



Osprey Approach: Manage Contract Work Forms List Values for Legal Aid Reporting

This help guide was last updated on
Jun 6th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=17589>



The guide will show you how to manage your Contract Work Forms

Sometimes, the LAA will introduce new codes or discontinue old ones which are required for reporting. In this event, you can amend the codes as necessary.

Managing the LAA codes for reporting the CRM6 or CMRF

Navigate to Case Management > Contract Work Forms > Manage Lists.

Osprey Approach
Osprey Approach Test

Global search

Supervisor | Financial Periods

Current Year: 26. Year Start: 01/01/2024. Year End 31/12/2024
 Current Period: 4 of 12
 Current Period Dates: 01/04/2024 to 30/04/2024
 Current Posting Date : 12/04/2024

CASE MANAGEMENT

Key Dates
 Dossier
 Document Production
 Contacts & Organisations
 Workflows
 Debt Recovery

Contract Work Forms

RTAPI Claims
 Run IHT Forms
 Searchflow
 Lexis Forms
 SDLT Forms
 Matter History New
 InfoTrack

scheduled for this period.
 ticking.

Available

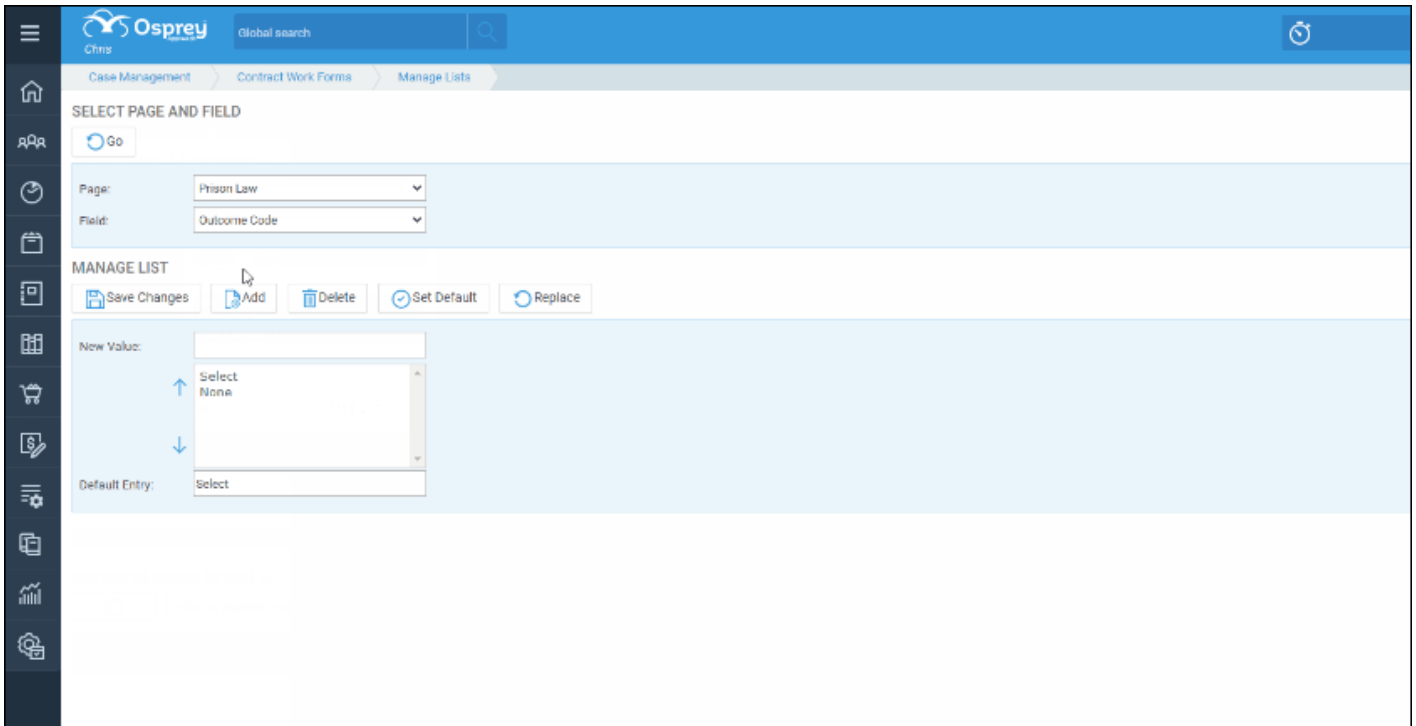
	PERIOD END DATE
	01/08/2024
	31/12/2024
	31/12/2024
	30/11/2024

Manage Lists

CRM List Defaults

	30/09/2024
	31/08/2024
	31/07/2024
	30/06/2024
	31/05/2024

In the 'Page' drop down, select the relevant page that you want to check or add a value for. Then select the field.



Add new codes

In the Manage List section, enter the value you want to add into the 'New Value' box. Ensure that the code part of the value is at the beginning. Where reporting a CRM6, Osprey will use the first few characters for populating your online submission file. Please refrain from using / characters in these codes. For example use 'None' rather than N/A - special characters can cause the spreadsheet to error. Click 'Add' when you are done.

Your new value will be added to the bottom of the existing list. To move it into a new position in the list, select it from the list box. Then use the up or down arrows to move it to the desired position.

Click 'Save Changes' to ensure your new entry is saved into the list.

Case Management > Contract Work Forms > Manage Lists

SELECT PAGE AND FIELD

Go

Page: Civil Contract Work

Field: Matter Type 1

MANAGE LIST

Save Changes Add Delete Set Default Replace

New Value:

- IASA - Asylum - Stage 2a (CLR)
- CLEX - Freedom of expression or
- CLPD - Prohibition of discriminatic
- CLAL - Administrative law
- CLOT - Public Law Other
- MARB - Arbitration
- MCPT - Contentious probate

Default Entry: Please select

Delete codes

If you wish to delete an entry, select it from the list box, and click Delete. Click Save Changes when you are done.

Case Management > Contract Work Forms > Manage Lists

SELECT PAGE AND FIELD

Go

Page: Civil Contract Work

Field: Matter Type 1

MANAGE LIST

Save Changes Add Delete Set Default Replace

New Value:

- MHAR - Harassment (non-franchi
- MNUI - Nuisance/trespass (non-h
- MWIL - Non-family wills
- MCON - Change of name
- MOTH - Miscellaneous Other
- XXXX - XNew Test

Default Entry: Please select

Edit codes

If you wish to edit an entry, double click it from the list box. This will copy the detail into the New Value box. Edit the entry, and click Replace. Click Save Changes when you are done.

Case Management > Contract Work Forms > Manage Lists

SELECT PAGE AND FIELD

Go

Page: Investigations

Field: Police/Court Ident

MANAGE LIST

Save Changes Add Delete Set Default Replace

New Value: C6013A - BALHAM HIGH ROAD YOUTH

- C25885
- C121
- test
- RD009
- NE001
- C6013A

Default Entry: Select

Set a default value

If you wish to set a default value for any of the form fields, select it from the list box. Then click Set Default, then Save Changes. When you fill in your contract work pages, this value will be automatically populated into the relevant field.

SELECT PAGE AND FIELD

Go

Page: Investigations

Field: Police/Court Ident

MANAGE LIST

Save Changes

Add

Delete

Set Default

Replace

New Value: C6013A - BALHAM HIGH ROAD YOUTH

- C25885
- C121
- test
- RD009
- NE001
- C6013A - BALHAM HIGH ROAD YC

Default Entry: Select