



Osprey Approach: Reports: Consolidated Matters

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The latest version is always online at
<https://support.ospreyapproach.com/?p=60346>

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This guide explains how to generate an importable CSV file for upload to the LAA portal for Civil work

Set up your client and matter

To be able to generate a Consolidated Matter report, your matters must have all of the following filled.

- Client forename and surname in the client details area
- UFN
- Franchise Category (licensed and set to type Civil in Supervisor > Code Setup > Franchise Categories)
- Remuneration type that relates to civil work
- Time recording entries and ledger entries as relevant

Fill in the Personal Data information

Navigate to Case Management > Contract Work Forms. Select the Personal Data page, and click Edit, then fill in the details and Save.

CONTRACT WORK 

Select Form Required:  Edit

Age	<input type="text" value="30"/>	Ethnic Origin	<input type="text" value="01 - White British"/>
Client Date of Birth	<input type="text" value="20/02/2019"/>	Gender	<input type="text" value="Male"/>
Disability Monitoring	<input type="text" value="Y"/>		

Fill in the Civil Contract Work information

From Case Management > Contract Work Forms, select Civil Contract Work and click Edit. Fill in all the details as relevant. For help with adding any missing codes, see the Manage Contract Work Forms list values for Legal Aid reporting guide.

The Date Concluded is used when running the report to determine which matters to show.

CONTRACT WORK ▾

Select Form Required:  Edit

Area of Law	<input type="text" value="MAT - Family"/>	Date Concluded	<input type="text" value="20/02/2019"/>
Unique Client No	<input type="text"/>	Matter Type 1	<input type="text" value="FAMA - Divorce/Judicial"/>
Matter Type 2	<input type="text" value="FADV - Client is seeking a"/>	Stage Reached	<input type="text" value="BA - First meeting"/>
End Point 2 (obsolete)	<input type="text"/>	Outcome Code	<input type="text" value="FD - Client referred to me"/>
Tolerance Indicator	<input type="text" value="Yes"/>	Case Stage level	<input type="text" value="FPL01 - Test"/>
Value of Costs/Damage Recovered	<input type="text" value="100.00"/>	Local Authority Number	<input type="text" value="124351"/>
Client Type	<input type="text" value="P - Parent"/>	Adjourned Hearing Fee	<input type="text" value="0.00"/>
Additional Travel Payments	<input type="text" value="Y - Yes"/>	Meetings Attended?	<input type="text" value="MEET01 - 1"/>
Detention Centre	<input type="text" value="Please Select"/>	CMRH/Oral Phone	<input type="text" value="Please Select"/>
Procurement Area	<input type="text" value="PA00137 - Midlands & E"/>	Access Point	<input type="text" value="AP00152 - Greater Nottir"/>

Fill the relevant work type pages

If your matter relates to Immigration, select the Civil Immigration page under Case Management > Contract Work:

CONTRACT WORK ▾

Select Form Required:  Edit

AIT Hearing Centre	<input type="text"/>	Home Office UCN	<input type="text"/>
Substantive Hearing	<input type="text"/>	CMRH oral	<input type="text"/>
CMRH telephone	<input type="text"/>	HO Interview	<input type="text"/>
Immigration CLR Code	<input type="text"/>	Immigration CLR Date	<input type="text"/>
Claim Type	<input type="text"/>	Prior Authority Ref	<input type="text"/>
			Legacy Case <input type="text"/>

Or for Associated CLS, fill the page below:

CONTRACT WORK ▼

Select Form Required: Associated CLS ▼  Edit

Class	<input type="text"/>	Stage Reached	<input type="text"/>
Outcome Code	<input type="text"/>	Offence Code	<input type="text"/>
Number of Suspects	<input type="text"/>	No Police/Court Attendances	<input type="text"/>
Police/Court Ident	<input type="text"/>	Duty Solicitor	<input type="text"/>
Youth Court	<input type="text"/>		

Check that your branch information is correct

In Supervisor > System Setup > Branches, edit each of your branches in turn and ensure that your LAA Supplier number and CLS Schedule number are set correctly:



This branch cannot be archived because is linked to live matters.

Branch
Description:

Malvern

Branch
Weighting(%):

50.00

Location:

Non-London



TM User Id:

LAA Supplier
No:

938820048

CRM Contract
No:

xx/987654/x

CRM Schedule
No:

crm/sched/num

CLS Schedule
No:

NANNNA/MEDI2010/19

Run your reports

You can now begin running the reports.

Navigate to Reports > Miscellaneous > Contract Work, and choose the report you want to print:

REPORT PARAMETERS

Run

Report:	Controlled Matter Start ▼
Start Date:	Controlled Matter Start
	Consolidated Matters - FamH
	Immigration Reports
	Consolidated Matters - MenH
	Consolidated Matters - TFF
	CRM 6 & CRM 11 - Contract Work Reports
	CRM 7 - NS Fee Contract Work

Select the Start Date (this will be the earliest date which you have set under Date Concluded in the Civil Contract Work page), Branch (of the matters) and Currency as relevant, then click Run:

REPORT PARAMETERS

Run

Report:	Consolidated Matters - FamH ▼
Start Date:	20/02/2019 
Branch:	ALL ▼
Currency:	Pound Sterling ▼

The report will open, you can print it if required, and Export to CSV for online submission:

The printer settings will need to be changed to Landscape to print this report properly

Office Schedule No: / /

FamH- Consolida

Case Reference Number	Case Start Date	Case ID	UFN	Client Forename	Client Surname
C00040/1	20/02/2019	001	200219/001	Chelsea	Campbell (Test Civil I Δ