



Osprey Approach: Reports: Consolidated Matters

This help guide was last updated on
May 31st, 2024

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



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: Personal Data

Edit

Age

30

Ethnic Origin

01 - White British

Client Date of Birth

20/02/2019

Gender

Male

Disability Monitoring


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: **Civil Contract Work** ▾  Edit

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

AIT Hearing Centre		Home Office UCN	
Substantive Hearing		CMRH oral	
CMRH telephone		HO Interview	
Immigration CLR Code		Immigration CLR Date	
Claim Type		Prior Authority Ref	
Legacy Case			

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:

 Reload Data |  Print Page |  Print All |  Export For Online Submission

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

Office Schedule No: / /

FamH- Consolidated

Case Reference Number	Case Start Date	Case ID	UFN	Client Forename	Client Surname
C00040/1	20/02/2019	001	200219/001	Chelsea	Cannell (Test Civil 1 & 2)