

Osprey Approach: Reports: CRM7

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<https://support.ospreyapproach.com/?p=60359>

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This guide will take you through generating the CRM7 report

Where a matter has become a non-standard fee, you can claim this as a CRM7 using the Stage Reached codes of PROG (Representation order – non-standard fee) or PROM (Revised Standard Fee (designated areas): Non-Standard Fee). To generate a CRM7 you will have needed to complete your matter using the steps below.

Set up your matter

Ensure you have selected an appropriate remuneration for the matter, and added a UFN.


Complete your time recording



The table below shows the current standard fees and their limits. Ensure that the time recorded (excluding Travel and Waiting) has exceeded the Higher Standard Fee Limit figure for the category selected. You can check this by running a detailed Billing Guide from Time Recording > Time Billing > Billing Guide.

Higher and Lower Standard Fees Table for cases that have a representation order that is on/after 30/09/2022				
	Lower Standard Fee (£)	Lower Standard Fee Limit (£)	Higher Standard Fee (£)	Higher Standard Fee Limit (£)
Designated Area Standard Fees				
Category 1A	£286.02	£313.19	£542.58	£542.63
Category 1B	£232.53	£313.19	£500.99	£542.63
Category 2	£397.14	£538.02	£831.85	£896.59
Undesignated Area Standard Fees				
Category 1A	£223.88	£313.19	£474.15	£542.63
Category 1B	£182.01	£313.19	£437.81	£542.63
Category 2	£321.37	£538.02	£737.08	£896.59

Fill in the Contract Work pages


To successfully generate a CRM7, you must have filled in all fields on the Personal Data page



CONTRACT WORK 

Select Form Required:   Edit

Age	<input type="text" value="A"/>	Ethnic Origin	<input type="text" value="01 - White British"/>
Client Date of Birth	<input type="text" value="22/07/1973"/>	Gender	<input type="text" value="Male"/>
Disability Monitoring	<input type="text" value="Y"/>		

the Proceedings page

CONTRACT WORK 

Select Form Required:   Edit

Class	<input type="text" value="Proceedings"/>	CDS Standard Fee	<input type="text" value="RCAT 2"/>
Stage Reached	<input type="text" value="PROG - Representation on"/>	Category 1 Subcategory	<input type="text" value="1EW - Either Way"/>
Offence Code	<input type="text" value="01 - Off Agst Person"/>	Number of Suspects	<input type="text" value="1"/>
No Police/Court Attendances	<input type="text" value="2"/>	Police/Court Ident	<input type="text" value="C1695 - Forest of Dean (C"/>
Outcome Code	<input type="text" value="CP04 - Trial: acquitted"/>	Duty Solicitor	<input type="text" value="No"/>
Youth Court	<input type="text" value="No"/>	Representation Order Date	<input type="text" value="29/03/2022"/>
MAAT Id	<input type="text" value="7236729"/>		

And finally ensure you have entered the Date Concluded on the Proc Completed row. Leave Proc Completed set to No, as running the CRM7 report will set this to Yes to mark the case as complete.

CONTRACT WORK

Select Form Required:
Class Completion
Edit

Inv Completed	No	Date Concluded	
Proc Completed	No	Date Concluded	31/05/2022
Apps/Rev Completed	No	Date Concluded	
Prison Completed	No	Date Concluded	
CLS Completed	No	Date Concluded	

Note that the values selected in the above pages will differ depending on your client and the nature of their case.

Run the report

To generate your CRM7, navigate to Reports > Miscellaneous > Contract Work Reports. Select CRM7 - NS Fee Contract Work from the drop down list, ensure the correct branch is selected, and click Run.

REPORT PARAMETERS

☒ Run

Report:	CRM 7 - NS Fee Contract Work
Start Date:	19/12/2023
Branch:	Hereford
Currency:	Pound Sterling

The matter selection screen will now appear. You can only run one CRM7 at a time. Click Select alongside the matter you wish to run, tick any mileage that you want to allocate, and click Run.

