

Osprey Approach: Reports: CRM7

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The latest version is always online at
<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				
	<i>Lower Standard Fee (£)</i>	<i>Lower Standard Fee Limit (£)</i>	<i>Higher Standard Fee (£)</i>	<i>Higher Standard Fee Limit (£)</i>
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:   Edit


Inv Completed	<input type="text" value="No"/>	Date Concluded	<input type="text"/>
Proc Completed	<input type="text" value="No"/>	Date Concluded	<input type="text" value="31/05/2022"/>
Apps/Rev Completed	<input type="text" value="No"/>	Date Concluded	<input type="text"/>
Prison Completed	<input type="text" value="No"/>	Date Concluded	<input type="text"/>
CLS Completed	<input type="text" value="No"/>	Date Concluded	<input type="text"/>


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:	<input type="text" value="CRM 7 - NS Fee Contract Work"/>
Start Date:	<input type="text" value="19/12/2023"/> 
Branch:	<input type="text" value="Hereford"/>
Currency:	<input type="text" value="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.

Run | Close

Please only select ONE CRM 7 matter to run at a time. If more than ONE is ticked, ONLY the first one will be run.

Disb:

Mileage:

1

CLIENT	MATTER	F/E	UFN	SURNAME	INITIALS	CLASS	CAT	CAT VALUE	SELECT
DU00000001	2	MAB	050522/001	Duritz	A	REPRES	CDS7	0.00	Select

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Excel will open, and your CRM7 can be found on the CRM7 tab of the document.

Protect - Personal Information

CRM7

Legal Aid Agency

Non-Standard Fee Contract Work Assessment Form

This form must be submitted to your processing office
Please complete in block capitals

Please tick if you are appealing provisional assessment

Summary of Claim

Surname and Initial: Duritz A - DU00000001/2

UFN: 0 5 0 5 2 2 / 0 0 1

Provider number: 0 E 4 2 5 K 2

Stage Reached: P R O G

Outcome Code: C P 0 4

Matter Type: 0 1

Equal Opportunities Monitoring: 0 1 M Y

Profit Costs: £ 1,061.83

Disbursements: £ 0.00

Travel: £ 0.00

Waiting: £ 0.00

Date class of work closed: 31/05/2022

Number of defendants represented: 1

Number of court attendances: 2

Court Identifier: C1695

For office use only

Profit Costs Allowed: £

Disbursements Allowed: £

Travel Allowed: £

Waiting Allowed: £

Counsel's Account Number:

Counsel's Fees Claimed (Net): £

Counsel's VAT Claimed: £

Schedule of time spent
Complete in chronological order.

Fee earner's initials	Date dd mm yy	Travel hrs:mins	Waiting hrs:mins
MAB	21 07 22		
MAB	21 07 22		
MAB	21 07 22		
MAB	21 07 22		
MAB	21 07 22		