



Osprey Approach: Running Lexis Smart Forms (App)

This help guide was last updated on
Jul 30th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=53160>



This guide will show you how to run Lexis smart forms in the app

Osprey Approach offers integration with Lexis Nexis Smart Forms, allowing you to run their library of legal forms through Osprey.

Please note that you must have an account with Lexis Nexis and will require Adobe Reader to be set as your default PDF viewer to view the forms.

Generating a Lexis Form

Navigate to Document Production and select the Lexis Nexis Forms tab.

You will see a list of Lexis Smart Forms relevant to the kind of work you are doing.

The screenshot displays the Osprey app interface. On the left is a dark sidebar with navigation options: OSPREY BROWSER, OSPREY HOME, CLIENT & MATTERS, TIME RECORDING, CASE MANAGEMENT, CLIENT LEDGERS, BANKS & JOURNALS, REPORTS, and SUPERVISOR. The main content area shows a top status bar with 'Today's Units: 0', 'Today's Time: 00h:00m', and 'Today's Value: £0.00'. Below this is a 'Workflow Status Bar' and a document header: 'Document Production - D00004/3 (Doe John/CONPUR - p/o 318 Chiswick High Road, W4 5TF) FE: DAVID WT: CONPUR'. Action buttons include 'Change Client/Matter', 'Email', 'Conflict of Interest', 'Enable Client Web Access', 'Send SMS', and 'Document Production'. A tabbed interface shows 'STANDARD LETTERS', 'LEXIS NEXIS FORMS' (highlighted), 'PDF', and 'EXCEL'. A 'Description' field is empty. A 'Search' button is present. The list of forms includes: 'PA1P - Probate application' (Template - lcpa1p.pdf), 'AS1 - TEST FIELDS' (Template - lras1.pdf), 'N1 mapping' (Template - lcn1.pdf), and 'Completion Information and Requisitions on Title (Expandable version)' (Template - lsta13_exp.pdf).

If any forms are missing, please speak to your system supervisor who will be able to easily add them to the list.

Left click on the Lexis Smart Form to automatically save a copy to your matter history ready for printing or distributing.

Today's Units: 0
 Today's Time: 00h:00m
 Today's Value: £0.00

Global search

Workflow Status Bar

Document Production - D00004/3 (Doe John/CONPUR - p/o 318 Chiswick High Road, W4 5TF) FE: DAVID WT: CONPUR

Save With Time Recording Save Without Time Recording

Template
 PA1P - Probate application

Folder
 In Tray Items
 Matter History
 > 0_Adelini
 > 0_Adelini

Custom Type
 Please select...

Description
 PA1P - Probate application

Retention Period
 Please select...

Automatic Time Recording

You can amend the description, assign the form to a folder and set a retention period if required.

Select Save to add the form to the Matter History.

Editing the Lexis Nexis form

Navigate to your Matter History. The form which has just been saved will appear at the top of the list.

Today's Units: 0
 Today's Time: 00h:00m
 Today's Value: £0.00

Global search

00:00:44 / 0

Workflow Status Bar

Case Management - D00004/3 (Doe John/CONPUR - p/o 318 Chiswick High Road, W4 5TF) FE: DAVID WT: CONPUR

Change Client/Matter Email Conflict of Interest Enable Client Web Access Send SMS Document Production

KEYDATES DOCUMENTS WORKFLOWS

+ Add Document + Add Note Request Signature (DocuSign) Global

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION	RETENTION PERIOD	DETAILS	CREATED DATE	
	95157	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF		PA1P - Probate application	15/12/2022	tr
	93307	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF	2 weeks	CCL	23/05/2022	tr
	66228	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF		Client D00004: Matter 3: Restored by dave.	16/03/2021	d
	66227	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF		Email from system: Correspondence from Osprey Appr...	16/03/2021	d
	66226	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF		_Blank Letter to Client	16/03/2021	d
	66223	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF		InfoTrack - Hazard Summary Report - 1711 Leek Road	16/03/2021	d

Right-click on the form to bring up the item menu.

If you wish to make amendments, select Check Out.

Select the tick box to download a local copy, then select the option to 'Check Out'.

CHECK OUT

Comment

If the Lexis Smart Form has been mapped by a system supervisor, any data captured within Osprey can be automatically populated into the form.

<p>Provide the full name(s) of the person(s) applying to change the register. Where a conveyancer lodges the application, this must be the name(s) of the client(s), not the conveyancer.</p>	<p>6 The applicant: Miss Becky Fox</p>
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Close and save the form locally and then right-click on the form in the Matter History.

Select the option to Check In.

CHECK IN

Comment

Select the button to the right of the File box and select your locally saved form.

Comments are required when checking in. Select the Check In button to upload the latest reversion of the form to your Matter History.