Osprey Approach: Setting Matters for Review (App)

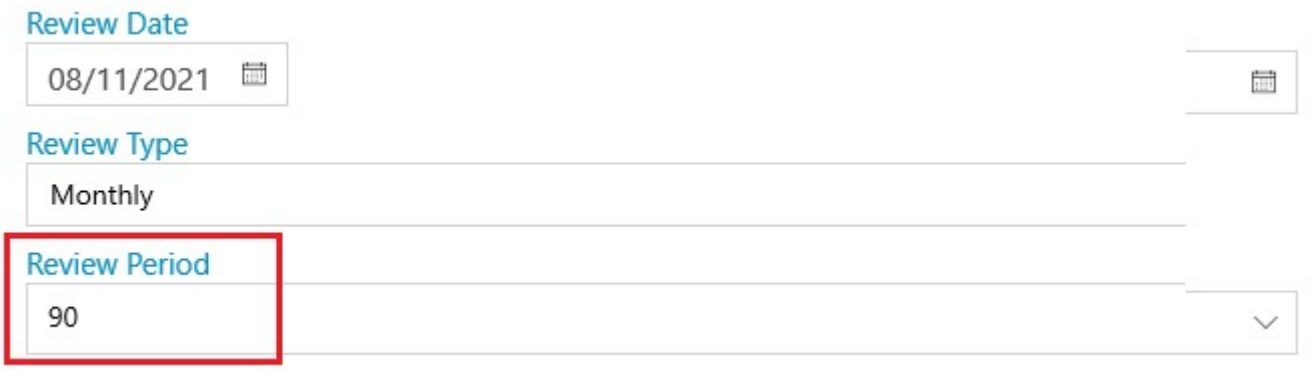
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The latest version is always online at
https://support.ospreyapproach.com/?p=53111

Osprey can be set up to flag matters which need reviewing based on a regular review date, or where they have become dormant. These matters will show on the Home page in Osprey for users who are also fee earners. You can also set the review range which allows you to specify how far into the future you want to see matters for review.

Set dormant matters to review based on Last Movement Date

To set up a matter to automatically display on the fee earner's home page, navigate to the Clients and Matters area , edit your matter, and set the *Review Period only* as a number of days. For example, if you want to flag the matter to review after 90 days of inactivity, enter 90 here.



When the matter has not been worked on for 90 days, it will appear in the Fee Earner's Matters for Review on the Home page.

e.g. If you have a matter with a Last Movement Date (LMD) of 05/03/2022 and today's date is 05/06/2022 and the Review Period is set to 90, a reminder will be displayed, as it is longer than 90 days since the matter was worked on. If a Review Period is set and the LMD is blank, a reminder will be displayed.

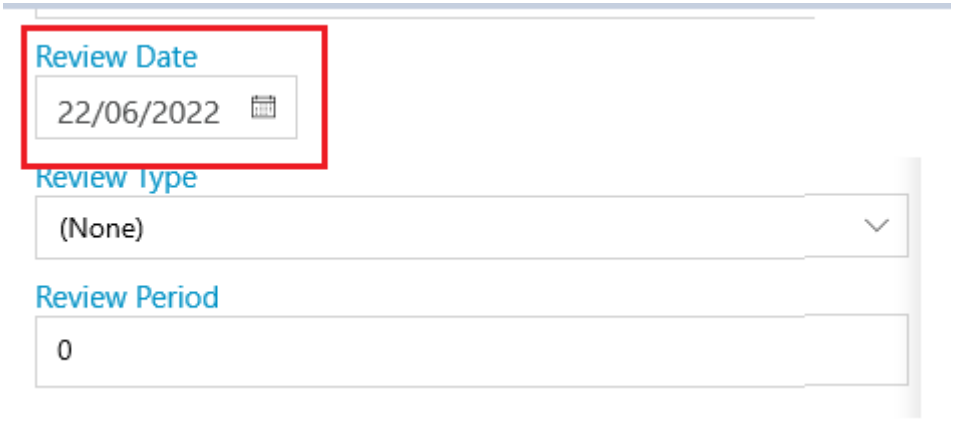
Osprey subtracts the Review Period number from today's date, and then compares the result to the LMD. So in the example above, 05/06/2022 minus 90 = 07/03/2022. This date is compared to the LMD, in this case 05/03/2022.

If the date is greater than or equal to the LMD the review reminder will be displayed every day until an amendment is made to the Matter and the LMD is updated.

Set matters to review based on a date and/or a frequency

You can also set up reviews to appear on the date you specify, and at regular intervals thereafter.

From the Client & Matters area of Osprey, edit your matter, and set the *Review Date* as the date you would like to review the matter:



When a matter is set with JUST a Review Date and no Review Type, the matter will remain in the list until the review date is amended.

If you wish to set a regular interval during which to review your matters, you can use the Review Date and Type combination. Set the Review Date as the first date you'd like to review your matter on, and the Review Type as one of the following:

Qualifier	Review Date	Brought Up On
(blank)	20/08/2008	20/08/2008 and every day until the Next Review date is re-set
Weekly	01/01/2008	07/01/2008, 14/01/2008 etc.
Monthly	21/03/2008	21/04/2008, 21/05/2008 etc.
Bi-monthly	01/03/2008	15/03/2008, 29/03/2008 etc.
Quarterly	03/03/2008	03/06/2008, 03/09/2008 etc.
Annual	01/01/2008	01/01/2009, 01/01/2010 etc.

Viewing Matters for Review

Navigate to the Osprey Home page to view your Matters for Review. Matters are colour coded to easily identify future (green), current (orange) and overdue (red) dates. This list is interactive, by clicking on the line of the matter you want to review, the matter will be automatically loaded for you. and you will be directed to the Matter details page.

