Osprey Approach: Setting Matters for Review

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Osprey™ Approach

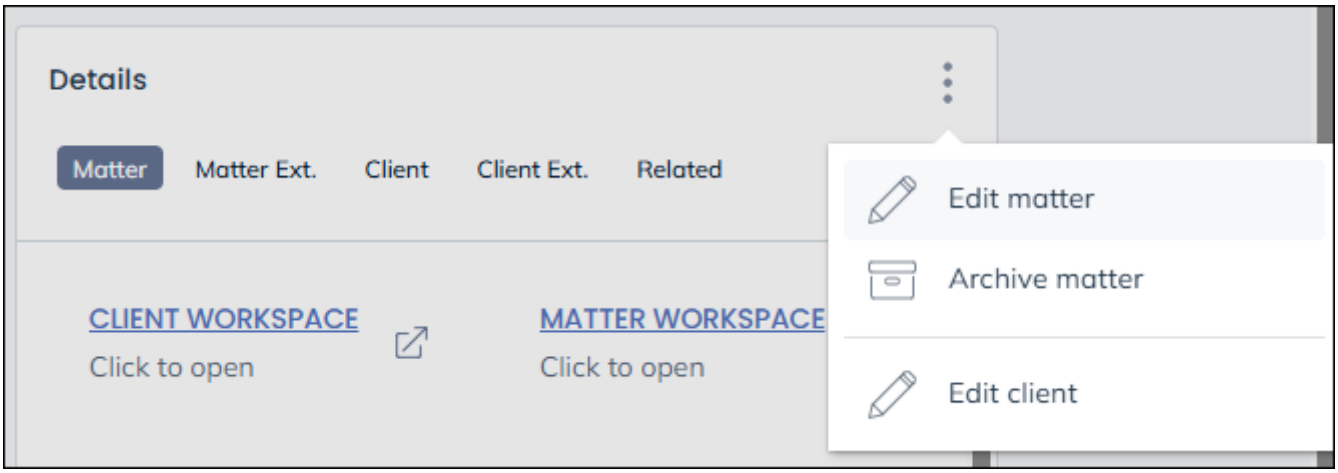
Osprey can be set up to flag matters which need reviewing based on a regular review date, or where they have become dormant.

This guide will take you through how to set a review date on these matters

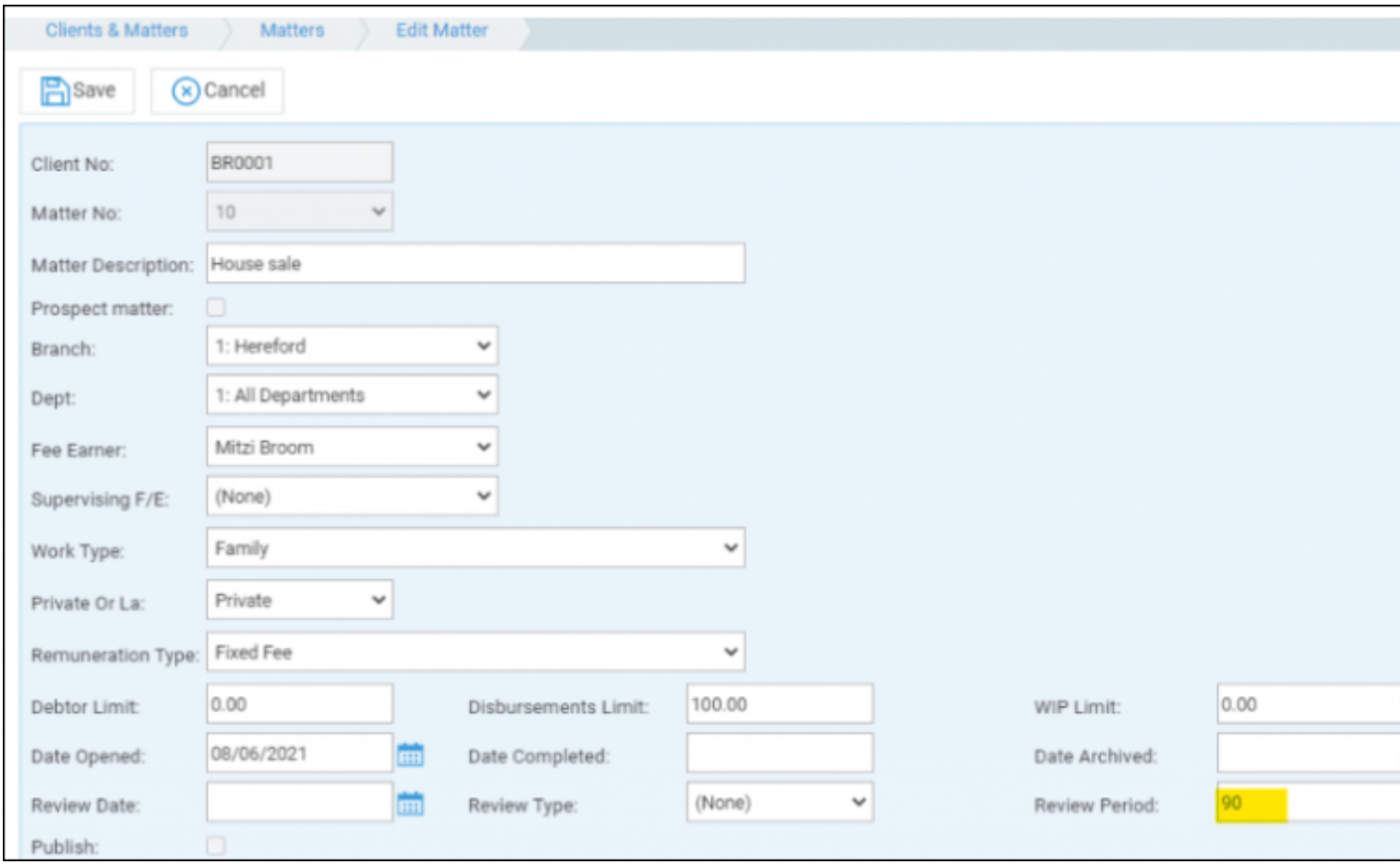
These matters will show on the Home page in Osprey for users who are also fee earners. You can also set the review range. This allows you to specify how far into the future you want to see matters for review.

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 matter workspace 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.

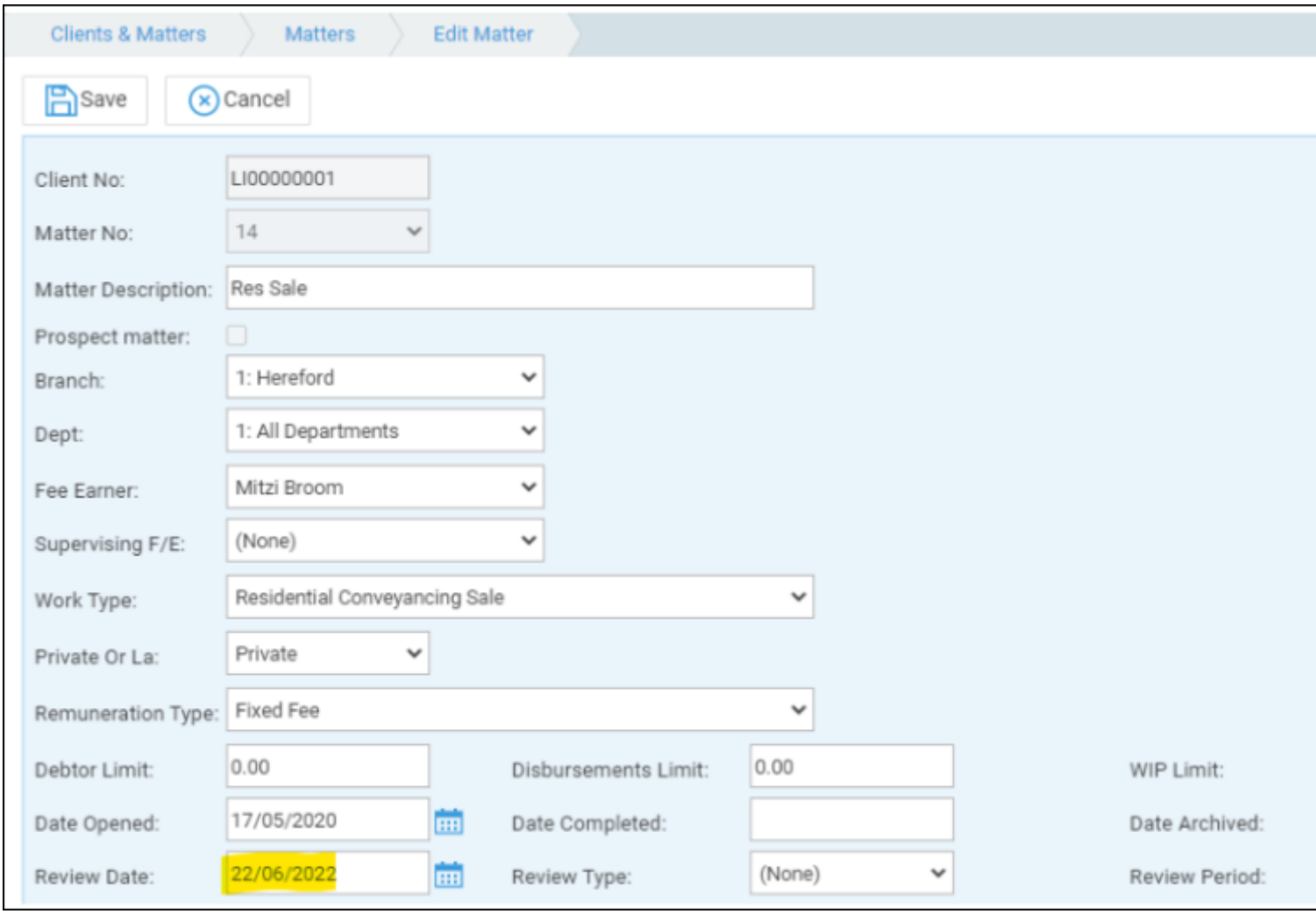
Osprey subtracts the Review Period number from today's date, and then compares the result to the LMD. So in the example above, 05/06/2022 minus 90 = 07/03/2022. This date is compared to the LMD, in this case 05/03/2022.

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 Matter workspace area of Osprey, edit your matter, and set the *Review Date* as the date you would like to review the matter:



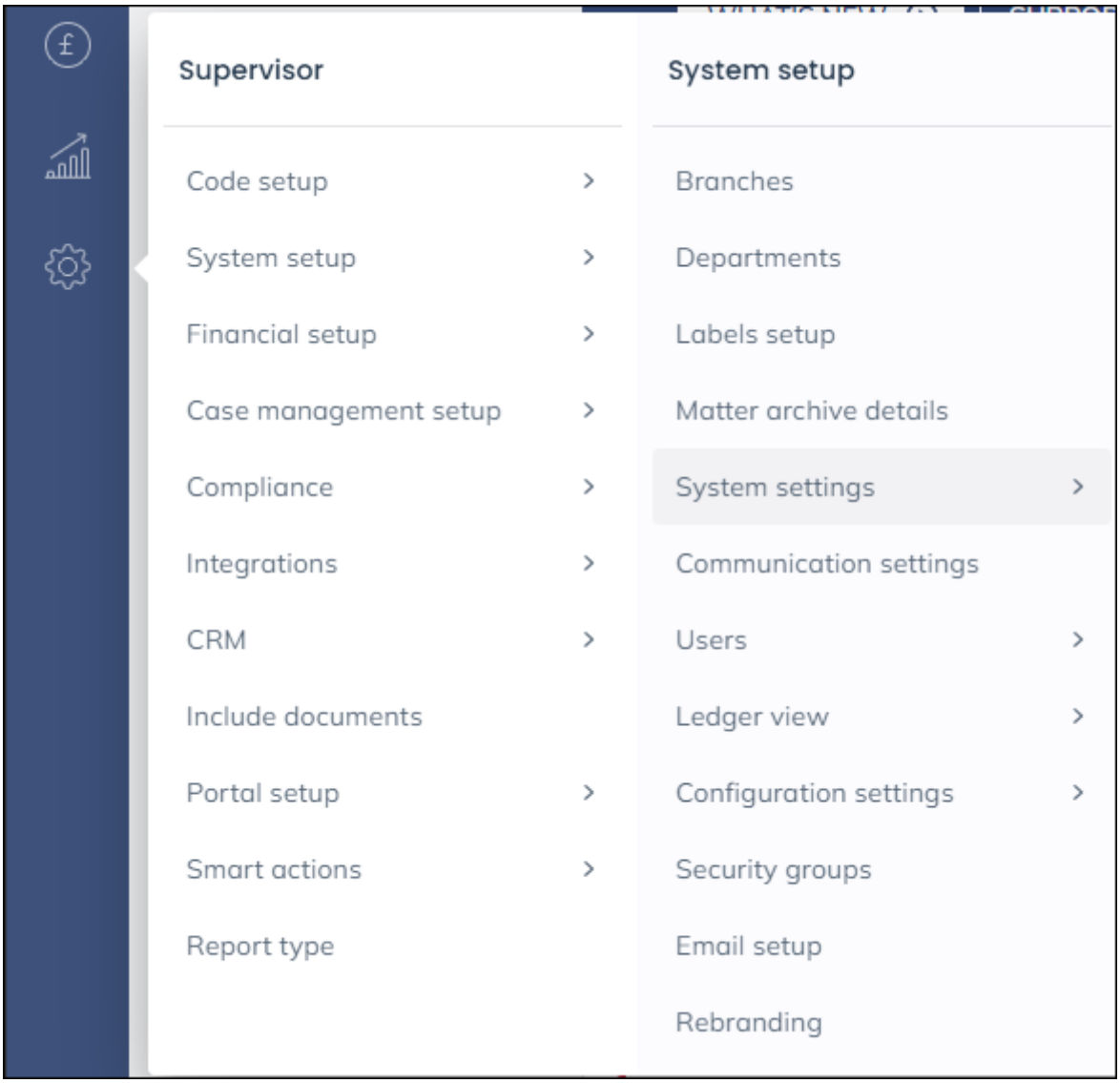
When matters are set with Review Dates only, it remains in the list until the review date is amended.

You may also set a regular interval during which to review your matters using the Review Date and Type combination. Set the Review Date as the first date you'd like to review your matter on. Then set 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 d
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.

Setting the Review Range

Navigate to Supervisor > System Setup > System Settings.



The Review Range is shown on this screen. Click Edit in the top left of the screen if you wish to amend it.

Entering a value in here will determine when Matters for Review using a date with no qualifier will appear. The value to enter is in days. By entering a value of 30 in the Review Range box, the matter for review will appear in your list 30 days before the date it is set for. If the value for Review Range is set to 0 the matter will appear on the review date set.

Viewing Matters for Review

Navigate to the Home page to view your Matters for review. Matters are colour coded to easily identify future (green), current (orange) and overdue (red) dates.

By clicking on the line of the matter you want to review, the details panel will show on the right-hand side.

The LMD column will either display the file opening date or the date of the most recent client ledger posting - Whichever was the most recent.

The Time LMD column will display the date of the last posting on the time ledger.

The Matter workspace will also display the review date for current matter.