



# Osprey Approach: Setting Matters for Review

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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 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.

The screenshot shows the 'Edit Matter' form in the Osprey system. The form is titled 'Clients & Matters > Matters > Edit Matter'. It includes a 'Save' button and a 'Cancel' button. The form fields are as follows:

Client No:	BR0001
Matter No:	10
Matter Description:	House sale
Prospect matter:	<input type="checkbox"/>
Branch:	1: Hereford
Dept:	1: All Departments
Fee Earner:	Mitzi Broom
Supervising F/E:	(None)
Work Type:	Family
Private Or La:	Private
Remuneration Type:	Fixed Fee
Debtor Limit:	0.00
Disbursements Limit:	100.00
WIP Limit:	0.00
Date Opened:	08/06/2021
Date Completed:	
Date Archived:	
Review Date:	
Review Type:	(None)
Review Period:	90
Publish:	<input type="checkbox"/>

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.

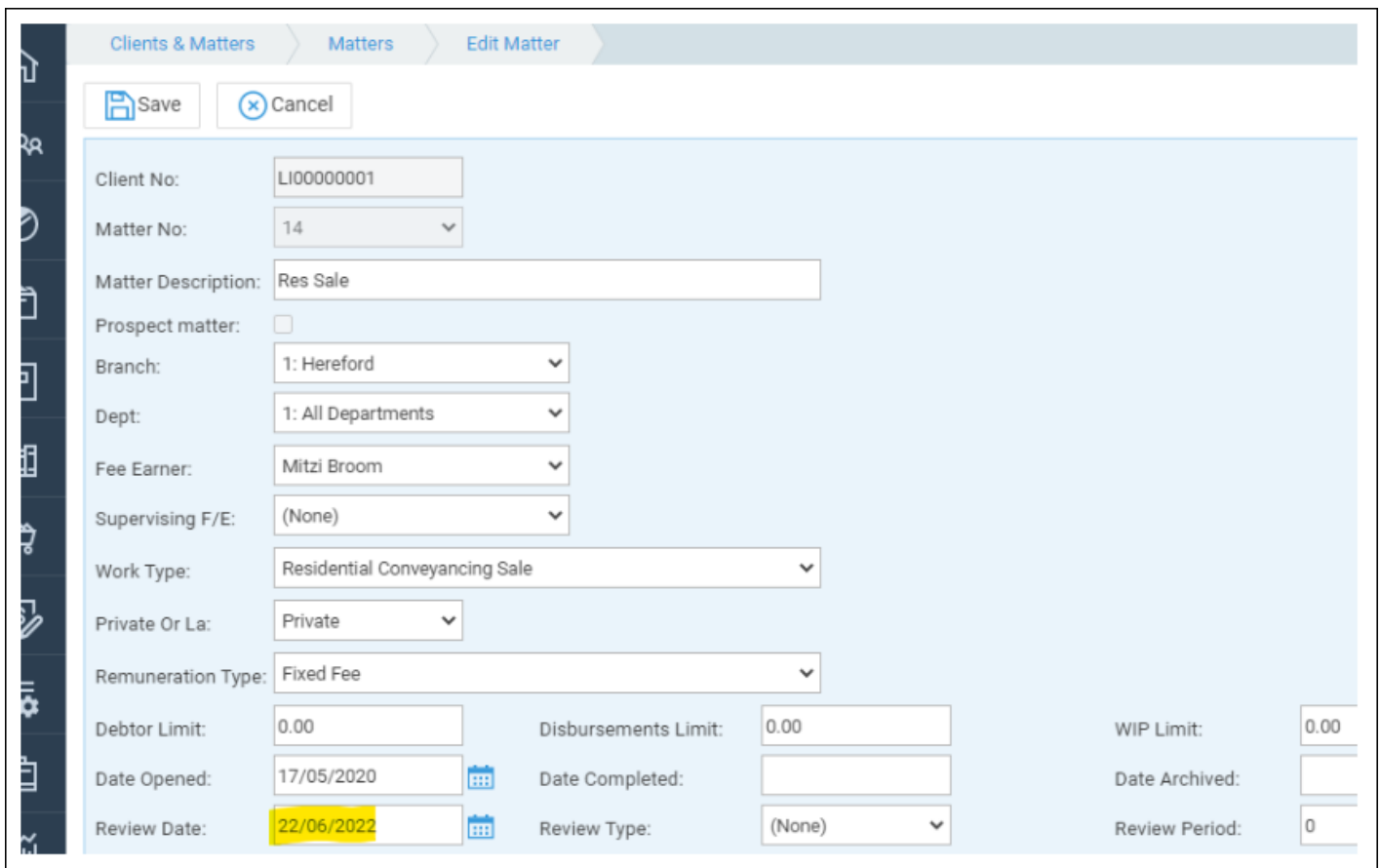
Osprey subtracts the Review Period number from today's date, and then compares the result to the LMD. So in the example above, 05/06/2022 minus 90 = 07/03/2022. This date is compared to the LMD, in this case 05/03/2022.

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:



The screenshot shows the 'Edit Matter' form in the Osprey system. The form is titled 'Clients & Matters > Matters > Edit Matter' and includes 'Save' and 'Cancel' buttons. The fields are as follows:

Client No:	L100000001
Matter No:	14
Matter Description:	Res Sale
Prospect matter:	<input type="checkbox"/>
Branch:	1: Hereford
Dept:	1: All Departments
Fee Earner:	Mitzi Broom
Supervising F/E:	(None)
Work Type:	Residential Conveyancing Sale
Private Or La:	Private
Remuneration Type:	Fixed Fee
Debtor Limit:	0.00
Disbursements Limit:	0.00
WIP Limit:	0.00
Date Opened:	17/05/2020
Date Completed:	
Date Archived:	
Review Date:	22/06/2022
Review Type:	(None)
Review Period:	0

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 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.

## 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 Osprey 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 matter will be automatically loaded for you. You will be directed to the Matter details page.

MATTERS FOR REVIEW									
F/E	CLIENT	MATTER ↓	MATTER DESCRIPTION	REVIEW DATE	TYPE	PERIOD	LMD	TIME LMD	SUP F/E?
MAB	LI0000001	15	WB	21/06/2022		0	17/05/2021		•
MAB	LI0000001	14	Res Sale	22/06/2022		0	17/05/2021		•
MAB	LI0000001	13	Res Pur			90	17/05/2021		•

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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.