

Osprey Approach: Using the Dossier (App)

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The latest version is always online at
<https://support.ospreyapproach.com/?p=44865>

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Dossier fields allow you to capture information you require to be able to progress and complete your client's matters, when can then be reused to populate documents and email templates, perform searches, or even dictate which actions should run from within a workflow.

As each firm will work differently, your system supervisor may configure Osprey to use one or more of the below methods.

Client or Matter Level

Dossiers may be set to be at a Client Level or a Matter Level.

Client level will relate to the client themselves and can capture information that would not change between areas of law.

Examples of Client Level Dossier fields: *Date of Birth, National Insurance Number, Passport Number, Company Registration Number.*

Matter Level will relate to the work being carried out, that would only be applicable for the matter.

Examples of Matter Level Dossier: *Property Sale Price, Name of Police Officer in attendance, date of incident*

Extensions

Extensions allow specific dossier fields to be captured whilst adding the client into Osprey.

Client extensions will appear at the bottom of the client screen and can be set up to display if the client is an individual, a company, or either.

Client Extension
Communication Method
Please Select
ID Provided?
Please Select
ID 1
Please Select
ID 2
Please Select
Client Gender
Please Select

Matter Extensions will be linked to a specific work type but work in a similar way.

When adding a matter, a matter extension will appear at the bottom of the screen. This section may contain fields that are linked to various dossier pages.

Matter Extension

BK Purchase Address

Estate Agent

(None selected)

Estate Agent Ref

Other Party 1 Full Name

Neil Braithwaite

Other Party 1 address

Other Party 2 Full Name

Capture this information where possible and click Save.

If you require to amend any of these fields, you can edit the client details page, or matter details page respectively.

Questionnaires

Questionnaires provide another format for you to be able to capture information and can even be sent out via the client web portal, to be completed by the client or associate directly.

These are produced through workflows, which can be accessed from Case Management, and selecting the Workflows tab.

OSPREY BROWSER

OSPREY HOME +

CLIENT & MATTERS +

TIME RECORDING +

CASE MANAGEMENT —

Contract Work Forms
Contacts
Organisations
Case Bundle
Packages
Searchflow
Infotrack
Coadjute

Client had completed workflow - Please archive

Case Management - 100003/1 (O'Wilson/Purchase 6 Anfield Road) FE: AG WT: FWRCP

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

KEYDATES
DOCUMENTS
WORKFLOWS

Load Workflow
Remove All

Search workflow task

Client Level Workflows

File Opening/Data Entry FWRCP (InfoTrack Purchase Residential Conveyancing Workflow v3)

Display a message to the user:Enter as much information as you hold into the following questionnaires. An opportunity to add fur

Allocate a Custom Questionnaire:Number of Parties FWRCP

Allocate a Custom Questionnaire:Purchaser 1 FWRCP

Allocate a Custom Questionnaire:Purchaser 2 FWRCP

Allocate a Custom Questionnaire:Purchaser 3 FWRCP

Dossier Pages

Any data captured via the Questionnaire or extensions are saved into dossier fields. Dossier pages hold the fields and can contain up to 20 dossier fields per dossier page.

To access matter level dossier pages, navigate to Client/Matter > Dossier Matter Level/
If you need to access the client dossier pages, navigate to Client/Matter > Client Details > Dossier Client Level

Dossier Pages - 100003/1 (O'Wilson/Purchase 6 Anfield Road) FE: AG WT: FWRCP

Change Client/Matter
Email
Conflict of Interest
Enable Client Web Access
Send SMS
Document Production
Add Matter
Edit Matter
Client Contact Details
Dossier Matter Level
Notes Matter Level
Client Details
Archive

Page Id	Description
RC_OCCUPIER	Occupier Details RC
RC_ORGANISATION	Organisations RC
RC_PROPDDETAIL	Property Details RC
RC_PURCH1	Purchaser 1 RC
RC_PURCH2	Purchaser 2 RC
RC_PURCH3	Purchaser 3 RC
RC_PURCH4	Purchaser 4 RC

Left click on the dossier page you wish to open. All linked dossier fields will appear. You will be able to make any adjustments and click Save.



Save

Solicitor Title

Mr

Solicitor First Name

John

Solicitor Second Name

Solicitor Surname

Jones

Solicitor Telephone

01234 567890

Solicitor Email

john@jones.com

Solicitor Firm Name

Jones and Jones

Solicitor DX

DX 12345

Solicitor Building Name

The Oaks

Solicitor Street Number

Solicitor Street Name

High street

Solicitor Town

Townington

Solicitor County

Countryside

Solicitor Postcode

AB1 2CD

Solicitor DX 2