

Osprey Approach: Undertakings

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The latest version is always online at https://support.ospreyapproach.com/?p=43601

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Designed to be used as its own "matter". Record standard and non-standard undertakings. Parties to the undertaking, discharge criteria and value if relevant, can be recorded and Key dates allow open undertakings to be monitored and kept on top of. Reports allow outstanding undertakings to be monitored by COLP to ensure that compliance is adhered too.

ALLOCATE A CUSTOM QUESTIONNAIRE

RELATED MATTER

Please enter the details of the matter to which the undertaking relates

Number of Related Matter

Name of Related Client

Department Undertaking relates

Please Select

Please Select

Your Departments Here

Office Undertaking Relates to

Please Select

Please Select

Your Departments Here

Fee Earner of Related Matter

Please Select

Please Select

Your Fee Earners Here

🗸 Submit

Cancel

UNDERTAKING DETAILS

Date Undertaking Made

Select a date	

Undertaking Type

Please Select

Please Select

Standard

Non-Standard

Undertaking Category

Please Select

Please Select

Monies Held to Order

Return of Documents

Payment of Our Costs

Payment of Third Party Costs

Discharge of Mortgage

Other

Undertaking Given or Received

Please Select

Please Select

Given

Received

Who Undertaking Made to / Received from

Person recording undertaking

Please Select

Please Select

Your Staff Here

Fee Earner responsible for Undertaking

Please Select

Please Select

Your Fee Earners Here

Undertaking Details

NON-STANDARD UNDERTAKING

Ha	as Non Standard Undertaking Been Approved by App			
	Please Select	\sim		
	Please Select			
•	Yes			
1	No			
1	Not applicable			
Submit Cancel				

ALLOCATE A CUSTOM QUESTIONNAIRE

DISCHARGE DETAILS

If discharge is possible but delayed, select "Outstanding" If Discharge is not possible ever, please select "Discharge Not Possible"

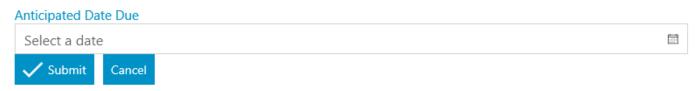
Status of Undertaking

Please Select		~		
Please Select			l	
Outstanding	standing			
Discharged	charged			
Discharge Not	Discharge Not Possible			
🗸 Submit	Cancel			

ALLOCATE A CUSTOM QUESTIONNAIRE

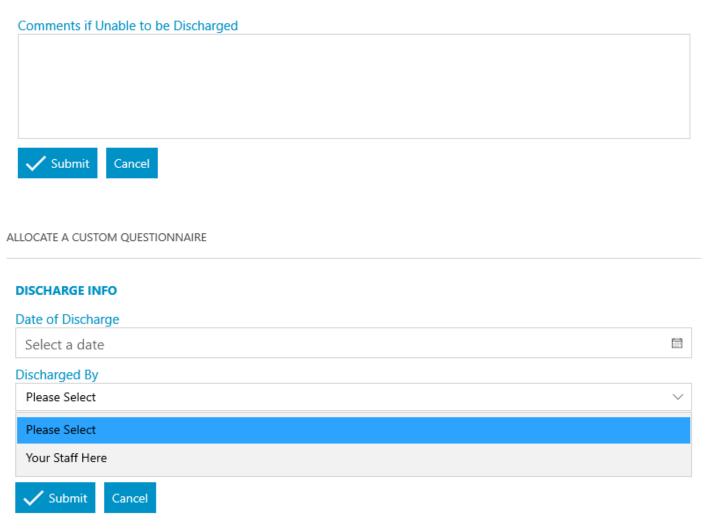
DISCHARGE DELAYED

If discharge of undertaking has been delayed, update Anticipated Discharge Date below



DISCHARGE NOT POSSIBLE

Enter details including any actions performed, if the undertaking will not be discharged



Undertaking Note

UNDERTAKING - { MERGEFIELD UT_DISCHARGE_UT_STATUS }

Matter Details	
Matter Number:	<pre>{ MERGEFIELD UT_DETAILS_UT_CL_MAT }</pre>
Fee Earner:	<pre>{ MERGEFIELD UT_DETAILS_UT_MAT_FE }</pre>
Client Name(s):	<pre>{ MERGEFIELD UT_DETAILS_UT_CL_NAME }</pre>
Department:	{ MERGEFIELD UT_DETAILS_UT_DEPT }
Office:	{ MERGEFIELD UT_DETAILS_UT_OFFICE }
Undertaking Details	
Date Undertaking Made	{ MERGEFIELD UT_DETAILS_UT_DATE }
Undertaking Type	{ MERGEFIELD UT_DETAILS_UT_TYPE }
Undertaking Category	{ MERGEFIELD UT_DETAILS_UT_CAT }
{ IF { MERGEFIELD	{ MERGEFIELD UT_DETAILS_UT_REC_MADE }
UT_DETAILS_UT_GIV_REC } = "Given"	
"Made to" "Received from" }	
Recorded By	{ MERGEFIELD UT_DETAILS_UT_PER_REC }
Fee Earner Responsible	{ MERGEFIELD UT_DETAILS_UT_RES_FE }
Details of Undertaking	{ MERGEFIELD UT_DETAILS_UT_DETAILS }
Financial Value of Undertaking	<pre>{ MERGEFIELD UT_DETAILS_UT_FIN_VAL \# £#,##.00}</pre>
Discharge Criteria	{ MERGEFIELD UT_DETAILS_UT_DIS_CRIT }
Anticipated Discharge Date of Undertaking	{ MERGEFIELD UT_DETAILS_UT_ANT_DUE }
Client has Agreed the Undertaking?	{ MERGEFIELD UT_DETAILS_UT_CL_AGREE }
Undertaking Confirmed in Writing?	{ MERGEFIELD UT_DETAILS_UT_WRITING }
Undertaking Unambiguous?	{ MERGEFIELD "UT_DETAILS_UT_UNAMBIG" }
Non-Standard Undertaking Approved by	<pre>{ MERGEFIELD UT_DETAILS_UT_SUP_APP }</pre>
Appropriate Person?	
{ IF { MERGEFIELD UT_DISCHARGE_UT_STAT	
Date of Discharge	{ MERGEFIELD UT_DISCHARGE_UT_DIS_DATE }
Discharged By	{ MERGEFIELD UT_DISCHARGE_UT_DIS_BY }
Comments as to why unable to be	<pre>{ MERGEFIELD UT_DISCHARGE_UT_DIS_NOT_POSS }</pre>
discharged	

_"}

<u>Notes</u>