# Osprey Approach: Undertakings

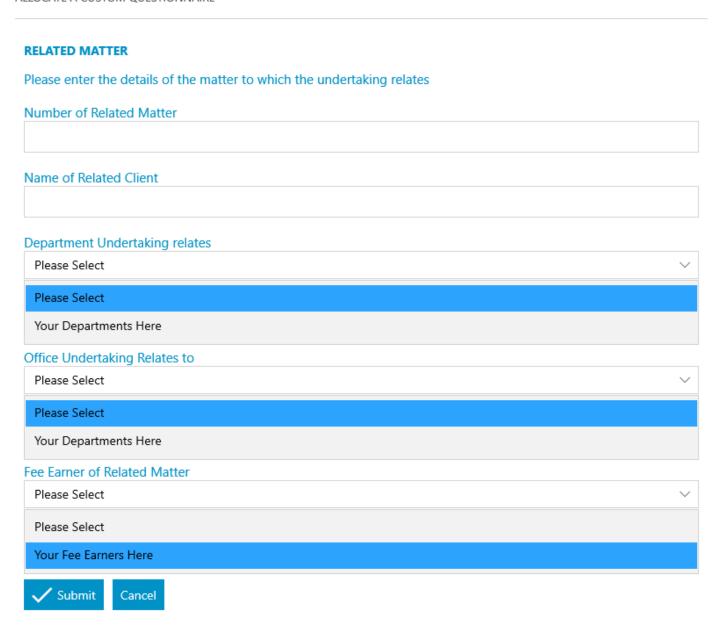
This help guide was last updated on Sep 20th, 2023

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



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



## **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

Has Non Standard Undertaking Been Approved by App

Please Select

Yes

No

Not applicable

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

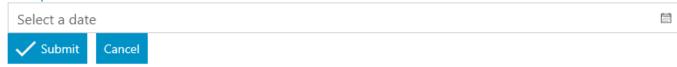


ALLOCATE A CUSTOM QUESTIONNAIRE

#### **DISCHARGE DELAYED**

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

Anticipated Date Due



#### **DISCHARGE NOT POSSIBLE**

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

Comments if Unable to be Discharged

Submit Cancel

#### ALLOCATE A CUSTOM QUESTIONNAIRE



## **Undertaking Note**

### UNDERTAKING - { MERGEFIELD UT DISCHARGE UT STATUS }

#### **Matter Details**

Matter Number:	{ MERGEFIELD UT_DETAILS_UT_CL_MAT }
Fee Earner:	{ MERGEFIELD UT_DETAILS_UT_MAT_FE }
Client Name(s):	{ MERGEFIELD UT_DETAILS_UT_CL_NAME }
Department:	{ MERGEFIELD UT_DETAILS_UT_DEPT }
Office:	{ MERGEFIELD UT DETAILS UT OFFICE }

#### **Undertaking Details**

OTTAC TEACHER	
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 }
<pre>UT_DETAILS_UT_GIV_REC } = "Given"</pre>	
"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	{ MERGEFIELD UT_DETAILS_UT_FIN_VAL \# £#,##.00}
Discharge Criteria	{ MERGEFIELD UT_DETAILS_UT_DIS_CRIT }
Anticipated Discharge Date of Undertaking	(MEDICELE DATE DETAILS LIT ANT DUE)
	{ 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	{ MERGEFIELD UT_DETAILS_UT_SUP_APP }
Appropriate Person?	

#### { IF { MERGEFIELD UT\_DISCHARGE\_UT\_STATUS } = "Outstanding" "" "Discharge Details

Date of Discharge	{ MERGEFIELD UT_DISCHARGE_UT_DIS_DATE }
Discharged By	{ MERGEFIELD UT_DISCHARGE_UT_DIS_BY }
Comments as to why unable to be discharged	{ MERGEFIELD UT_DISCHARGE_UT_DIS_NOT_POSS }

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