



Osprey Approach: PII Claims and Circumstances

This help guide was last updated on
Aug 11th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=43603>



Designed to be used as its own “matter”. Record PII Claims and circumstances in osprey, recording related matter details, parties and details of the purported error and losses. Record findings of your investigations and details of any settlements. Reports allow COLP/COFA and senior management to monitor claims and being able to report by date allows for easier completion of PI renewals and accreditations.

ALLOCATE A CUSTOM QUESTIONNAIRE

RELATED MATTER

Related Matter Number (If Relevant)

Fee Earner of Matter

Please Select

Please Select

Your Fee Earners Here

Department

Please Select

Please Select

Your Departments Here

Branch

Please Select

Please Select

Your Branches Here

Practice Area

Please Select

Please Select

Conveyancing

Wills

Probate

Related Complaint Number (If Relevant)

 Submit

Cancel

CLAIM DETAILS

Internal Claim Handler

Please Select

Please Select

Your Staff Here

Claim Type

Please Select

Please Select

Claim

Circumstance

Claimant

None selected

None selected



Claimant(s) Status

Please Select

Please Select

Client

Executor

Beneficiary

Date Identified

Select a date



Identified By

Please Select

Please Select

Your Staff Here

Date Purported Error Occurred

Select a date



Summary of Claim or Circumstance

Details of Proceeding Events

Description of Purported Loss

Additional Defendant(s) (If Any)

CLAIM INVESTIGATION

Claimant

None selected

None selected

Claimant(s) Status

Please Select

Please Select

Client

Executor

Beneficiary

Date Purported Error Occurred

Select a date

Summary of Claim or Circumstance

Details of Proceeding Events

Description of Purported Loss

Additional Defendant(s) (If Any)

Report to the Insurers Required

Please Select

Please Select

Yes

No

Not applicable

PI Claim Investigation Complete

Please Select

Please Select

Yes

No

Not applicable

Submit

Cancel

INSURER DETAILS

Insurer

None selected

▼

🔍

✎

+

None selected

Insurer Contact

None selected

▼

🔍

✎

+

None selected

Insurer & Policy Number

Please Select

▼

Please Select

Insurer Name - Policy No

Policy Year

Please Select

▼

Please Select

2016 - 2017

2017 - 2018

2018 - 2019

2019 - 2020

2020 - 2021

2021 - 2022

2022 - 2023

Insurer Reference

✓ Submit

Cancel

ADVICE RECEIVED

Details of Insurers Advice

Insurer Reference

Insurers Solicitors

None selected

None selected



Insurers Solicitors Contact

None selected

None selected



Insurers Solicitors Reference

Excess Payable

0.00

Insurers Loss Reserve

0.00

Defence Costs Paid so far

0.00

Claim Status

Please Select

Please Select

Open - Not Reported

Open - Reported to Insurers

Closed - Not Reported

Closed - Reported to Insurers

 Submit

Cancel

ADVICE RECEIVED

Details of Insurers Advice

Insurer Reference

Insurers Solicitors

None selected

None selected



Insurers Solicitors Contact

None selected

None selected



Insurers Solicitors Reference

Excess Payable

0.00

Insurers Loss Reserve

0.00

Defence Costs Paid so far

0.00

Claim Status

Please Select

Please Select

Open - Not Reported

Open - Reported to Insurers

Closed - Not Reported

Closed - Reported to Insurers

 Submit

Cancel

SETTLEMENT OFFER

Financial Offer for Settlement

0.00

Other Resolution Offered

✓ Submit

Cancel

CLAIM UPDATE

Summary of Claim or Circumstance

Details of Proceeding Events

Description of Purported Loss

Additional Defendant(s) (If Any)

Financial Settlement Demanded

0.00

Other Resolution Demanded

Proceedings Issued

Please Select

Please Select

Yes

No

Not applicable

✓ Submit

Cancel

CLOSING DETAILS

Date Closed

Select a date

Final Financial Claim Settlement

0.00

Final Resolution Offered

Date Claim Paid

Select a date

Remedial Action Taken

✓ Submit

Cancel

Blank Letter to Insurer

{INCLUDETEXT

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Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ QUOTE { DATE \@ "d MMMM yyyy" } }

{ MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_title } { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_initials } { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_surname } { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_address }

Dear { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_title } { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_surname }

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME!*UPPER }

{INCLUDETEXT

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Letter to Insurers solicitors

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Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }

Your Ref: { MERGEFIELD PII_INSURER_PII_INS_SOL_REF }

{ QUOTE { DATE \@ "d MMMM yyyy"} }

{ IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "{ MERGEFIELD PII_INSURER_PII_INS_SOLS_name }
{ MERGEFIELD PII_INSURER_PII_INS_SOLS_address }" "{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_title } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_initials } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname }
{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_compname }
{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_address }
}

Dear { IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "Sirs" "{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_title } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname }" }

Re: { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_forename } { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_surname } - { MERGEFIELD PII_INSURER_PII_INS_SOL_REF }

Yours { IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "faithfully" "Sincerely" }

**{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME!*UPPER }**

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Letter to Claimant

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Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }

Your Ref: { MERGEFIELD PII_INSURER_PII_INS_SOL_REF }

{ QUOTE { DATE \@ "d MMMM yyyy"} }

{ IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "{ MERGEFIELD PII_INSURER_PII_INS_SOLS_name }
{ MERGEFIELD PII_INSURER_PII_INS_SOLS_address }" "{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_title } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_initials } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname }
{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_compname }
{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_address }
}

Dear { IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "Sirs" "{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_title } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname }" }

Re: { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_forename } { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_surname } - { MERGEFIELD PII_INSURER_PII_INS_SOL_REF }

Yours { IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "faithfully" "Sincerely" }

**{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME!*UPPER }**

{INCLUDETEXT

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