

# Osprey Approach: Performing a Conflict of Interest Search (Browser)

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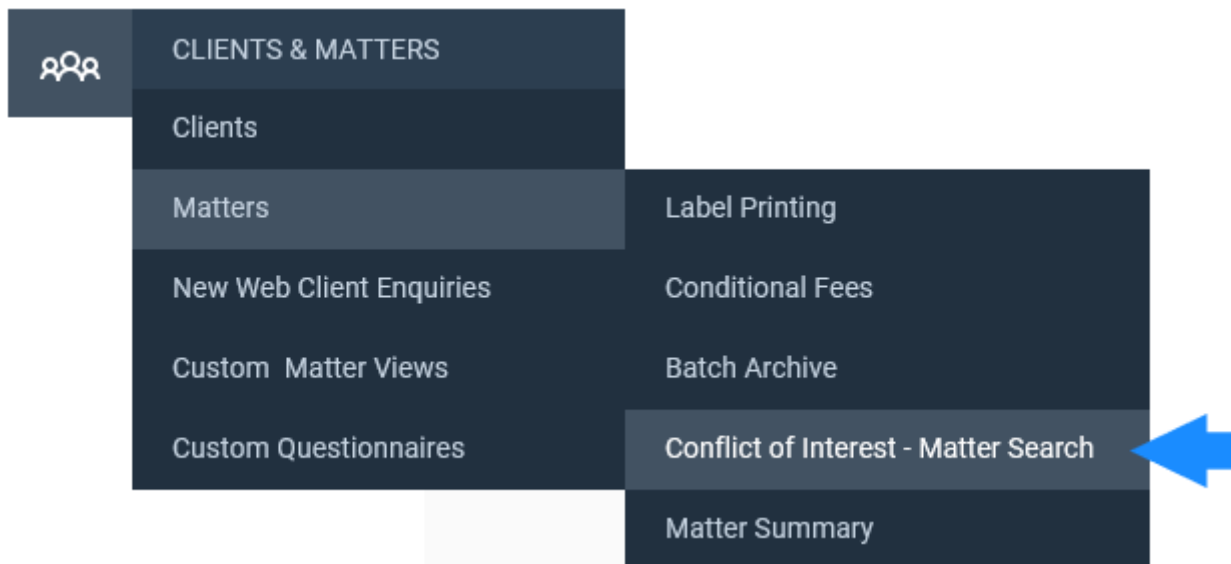
The latest version is always online at  
<https://support.ospreyapproach.com/?p=309>



A Conflict Check is available in Osprey to ensure that you do not add a client who is already present on the system, or another side in the relevant case.

Conflict of interest searches should be carried out whenever you add a new matter in order to ensure that the other side is not already listed as a client on your system.

To run a Conflict of Interest Search,



Select Clients & Matters > click Matters > Conflict of Interest - Matter Search.

## Client Search

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To search for duplicate Client details, ensure that the radio button is highlighted as below

- ☒ Client
- ☐ Dossier
- ☐ Client & Dossier

Then select the Next button.

Enter the details you wish to check for. Please note that you will need to select 'Yes' from the 'Include Archives' drop-down list to search archived files.

A supervisor level user will be able to edit a system switch, to allow archived files to be included in the conflict search by default, rather than the user having to select 'Yes' from the list.

Surname

Initials

Forename

House

Post Code

Fee Earner

Any

Worktype

Any

Matter Description

Include Archives

Yes

Please put ".\*" for a likeness search. e.g ..Smith

Select 'OK' to perform the search and bring up the conflicts.

Save

Client:

Matter:

SEARCH RESULTS

Search | Print

Client Search found 52 possible conflicts. Search criteria: Name: Johnson Forename: % Matter: % Street: % Town: % Fee Earner: Work Type: Inc Archives: Y

Export

Cancel

Search...

CLIENT	MATTER	INITIALS	SURNAME	FORENAME	MATTER DESCRIPTION	FEE EARNER	WORKTYPE	PRIVATE/	SELECT
J00005	1	M	Johnson	Matthew	Client considering action against employer	JE	EMP	P	<div></div>
J00018	1	RJ	Johnson	Rob	Purchase of 10 Spring Lane	RJ	TK_RCP	P	<div></div>
J00018	2	RJ	Johnson	Rob	Sale of 44 High Street	RJ	RCS	P	<div></div>
J00018	3	RJ	Johnson	Rob	Standard Will	RJ	WILL	P	<div></div>
J00018	4	RJ	Johnson	Rob	Child custody for Johnson	RJ	TK_CHL	P	<div></div>
J00018	5	RJ	Johnson	Rob	Clinical Negligence for Johnson	RJ	TK_CN	P	<div></div>
J00018	6	RJ	Johnson	Rob	Criminal Magistrates Court Not Guilty	RJ	TK_CRIM	L	<div></div>
J00018	7	RJ	Johnson	Rob	Divorce - Johnson vs Johnson	RJ	TK_DIV	P	<div></div>
J00018	8	RJ	Johnson	Rob	Debt Recovery for Johnson	RJ	TK_DR	P	<div></div>
J00018	9	RJ	Johnson	Rob	Employee Breach of Contract	RJ	TK_EME	P	<div></div>

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Select the Print button if you wish to print out the results or Search to select a matter to save your conflict search to. Click on the Select icon to go to the relevant matter overview.

This bar will show the criteria used in the search.

Client Search found 52 possible conflicts. Search criteria: Name: Johnson Forename: % Matter: % Street: % Town: % Fee Earner: Work Type: Inc Archives: Y

To save the results into the Matter History, ensure that the relevant client and matter number is selected, then select Save and click OK when a prompt appears. We can now see that the conflict search has been saved to the Matter History as a web page which can be viewed showing the criteria used and results.

FAVORITE	TYPE	REF NUMBER	CLIENT NO	CLIENT SURNA...	MATTER NO	MATTER DESCIP...	DETAILS	CREATED DATE	CREATED BY
q All ▾	q	q	q	q	q	q	q	q	q
★	📄	4546	J00005	Johnson	1	Client considerin...	Conflict Of Interest. Search criteria Client Filte...	16/07/2019 11:21:56	Steve

Search criteria Client Filters: Name: Johnson Forename: % Matter: % Street: % Town: % Fee Earner: Work Type: Inc Archives: Y

Client_no	Matter_no	Surname	Forename	Matter_description	Fee_earner_id	Work_id	Private_or_la	Initials
J00005	1	Johnson	Matthew	Client considering action against employer	JE	EMP	P	M
J00018	1	Johnson	Rob	Purchase of 10 Spring Lane	RJ	TK_RCP	P	RJ
J00018	2	Johnson	Rob	Sale of 44 High Street	RJ	RCS	P	RJ
J00018	3	Johnson	Rob	Standard Will	RJ	WILL	P	RJ
J00018	4	Johnson	Rob	Child custody for Johnson	RJ	TK_CHL	P	RJ
J00018	5	Johnson	Rob	Clinical Negligence for Johnson	RJ	TK_CN	P	RJ
J00018	6	Johnson	Rob	Criminal Magistrates Court Not Guilty	RJ	TK_CRM	L	RJ
J00018	7	Johnson	Rob	Divorce - Johnson vs Johnson	RJ	TK_DIV	P	RJ
J00018	8	Johnson	Rob	Debt Recovery for Johnson	RJ	TK_DR	P	RJ

## Dossier Search

We will now look at the Dossier search. Highlight the Dossier radio button and select Next.

- ☐ Client
- ☒ Dossier
- ☐ Client & Dossier

Select the page and field you wish to search by selecting the relevant entries in the drop-down lists. Then select a Search Type.

EQUAL To will return results that exactly match the specified criteria.



LIKE will return results that include the specified criteria but are not necessarily an exact match.

Place the data you wish to search for into the Value box.

Page	Details of Employee	▼
Field	National Ins Number	▼
Search Type	EQUAL TO	▼
Value	AB112234C	
Logical Operator	AND	▼

Then select 'Add'.

Your search will appear here. You may add more criteria if you wish.

PAGE ID	FIELD ID	FILTER	EDIT	DELETE
EMPLOYEE_DETS	NINUMBER	= 'AB112234C'		

You may refine your criteria search if you wish. The AND setting will enable you to search for results matching all set criteria.

Alternatively, use OR if you wish to find matches for more than one criteria.

Click OK to run the search. As with the Client search, you can now print or save to the Matter History should you wish.

## Client & Dossier Search

You are also able to run a combined Client and Dossier Search, which will first ask for client details to search by, then will go through the dossier search directly afterwards. This option can be used to find a specific client and other side combination.

Remember, the conflict searches DO NOT search archived matters by default, so you must select them if you wish to include them in your search results.

There are also other ways to [search for clients](#)