# Osprey Approach: CRM6 and CRM7 checklist

This help guide was last updated on
Dec 19th, 2023

The latest version is always online at
https://support.ospreyapproach.com/?p=1896

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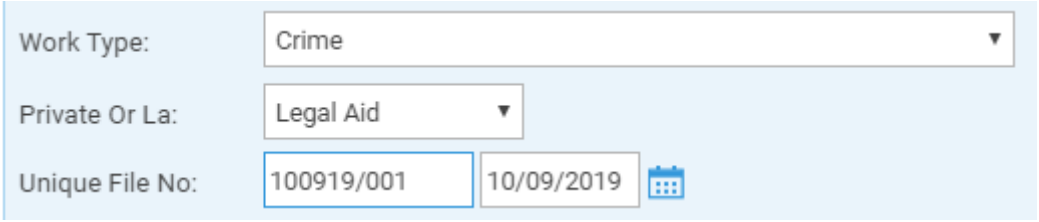
Osprey™ Approach

If matter requiring billing on the CRM6 or CRM7 is not appearing on the list of matters awaiting billing then you can follow this process.

The reason for this is because some essential information is missing or has been incorrectly set; check that each of the following are set up correctly for the matter.

## Ensure your matter has a UFN

Ensure that you have selected matter type Legal Aid along with the appropriate Franchise Category in order for the UFN field to be available.




## Ensure your time postings have been entered using an appropriate Remuneration Type

You can print the Billing Guide report to check the Remuneration Type for each posting



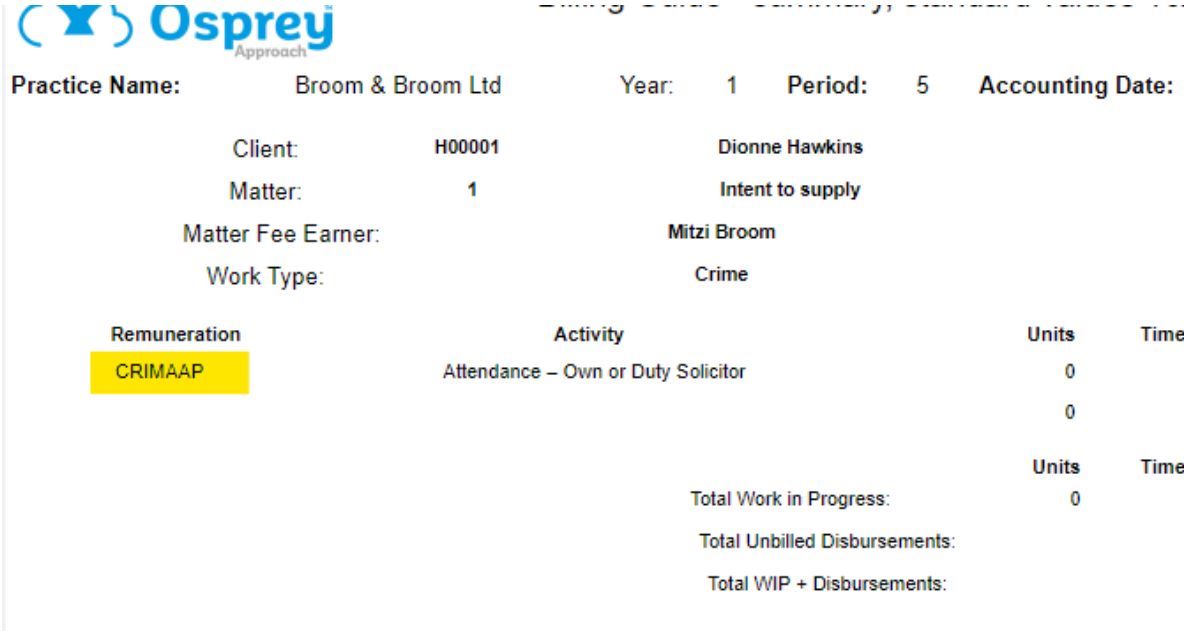
**TIME RECORDING**

Prospect Time Recording

Time Sheets

Time Billing

- Create Bill Template
- Print Bills
- View Billed Time
- Billing Guide



Practice Name: Broom & Broom Ltd Year: 1 Period: 5 Accounting Date:

| | | |
|---|---|---|
| Client: | H00001 | Dionne Hawkins |
| Matter: | 1 | Intent to supply |
| Matter Fee Earner: | | Mitzi Broom |
| Work Type: | | Crime |

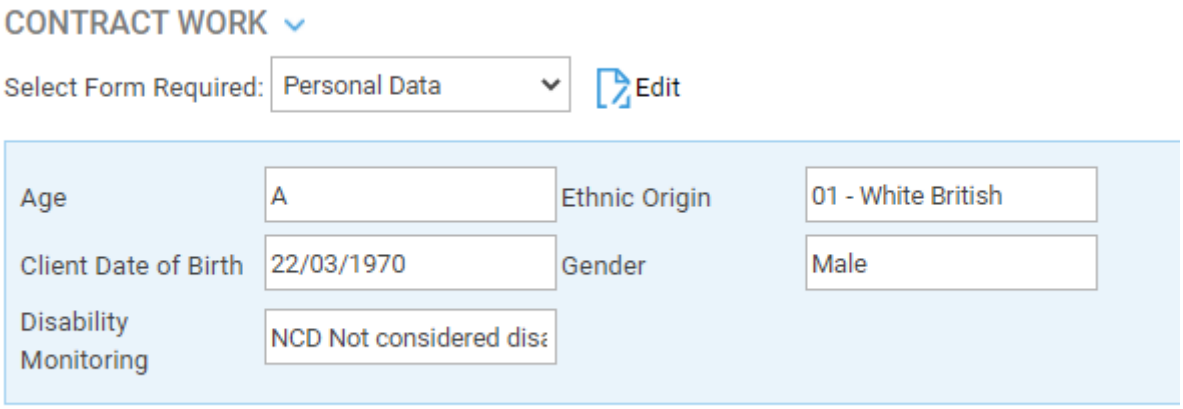
| Remuneration | Activity | Units | Time |
|---|---|---|---|
| CRIMAAP | Attendance – Own or Duty Solicitor | 0 | |
| | | 0 | |

| | Units | Time |
|---|---|---|
| Total Work in Progress: | 0 | |
| Total Unbilled Disbursements: | | |
| Total WIP + Disbursements: | | |

- Prison Law use PRISAA or PRISADV
- Investigations Class use CRIMAA, CRIMAAP or CRIMWFD
- Proceedings Class use CRIMAASCRO, CRIMAAMC, CRIMCDS, CRIMRMC, CRIMRHC
- Appeals & Reviews use ARAA or ARRDC

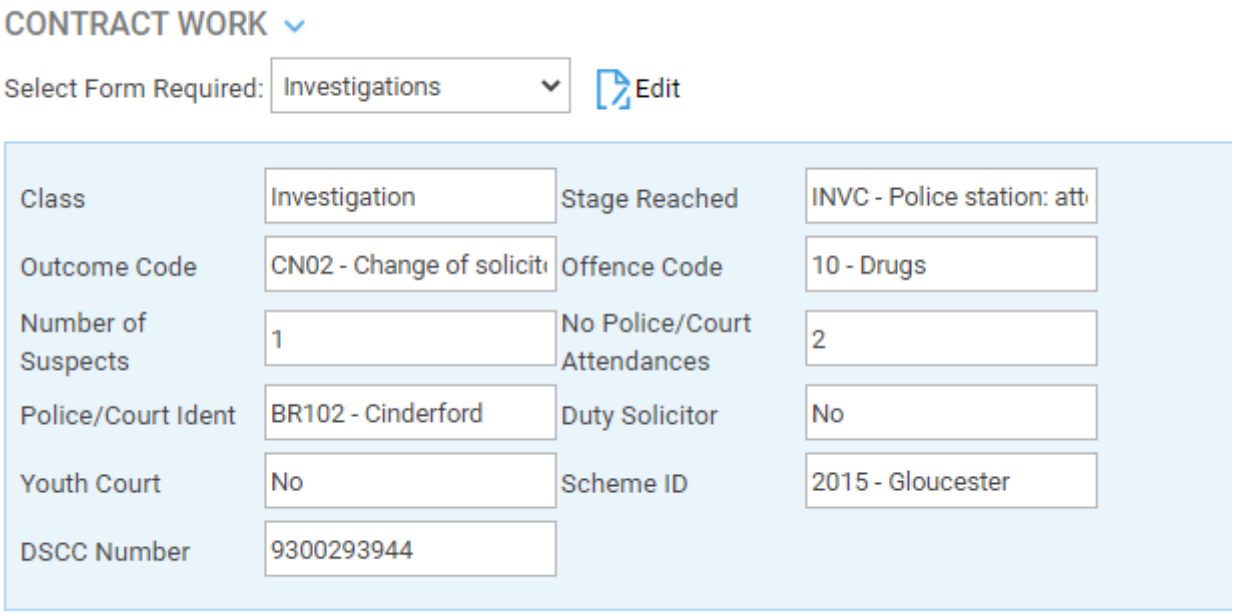
## Ensure that the Personal Data page is filled in

Navigate to Case Management > Contract Work Forms and select Personal Data from the Select Form Required box.



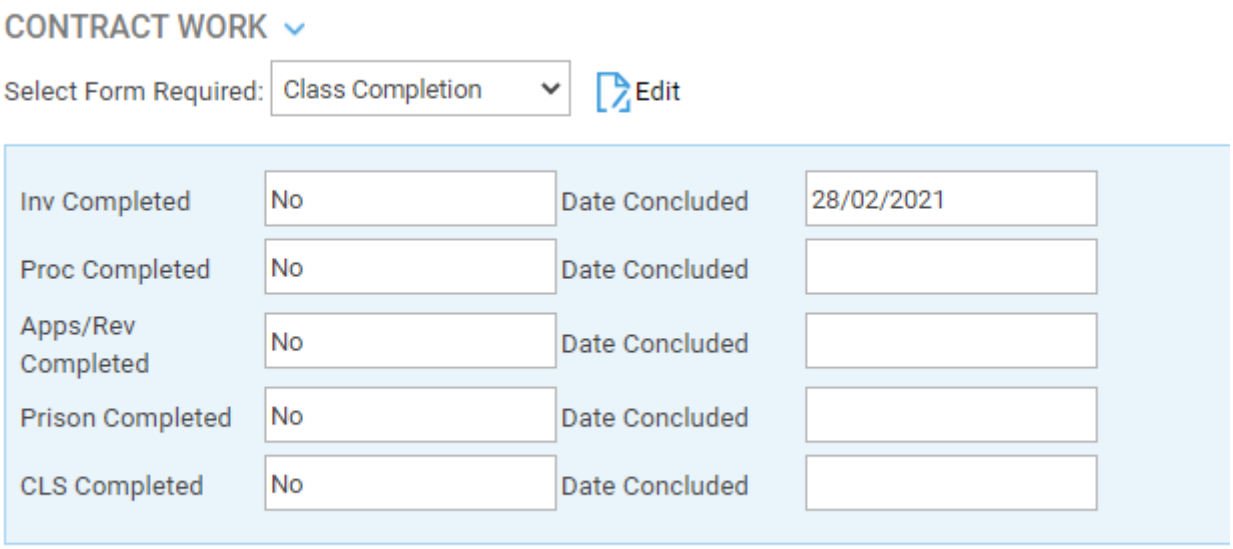

## Ensure that you have correctly filled the appropriate page depending on the class of work

Case Management > Contract Work Forms > Investigations/Proceedings/Prison Law etc. You should ensure that an Outcome code has been selected, if the LAA do not require an Outcome code (e.g. Duty Solicitor) select 'None'




## Ensure that the Date Concluded is set on the appropriate class in the Class Completion page

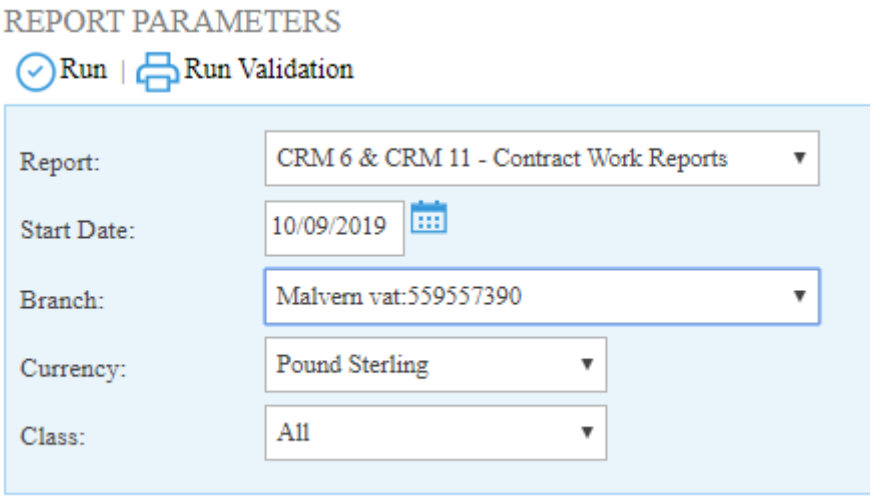
Case management > Contract Work Forms and select Class Completion:




Ensure also that the reporting status is set to No (this will be set to Yes automatically when the CRM6 report is run).

## Ensure you have selected the correct branch when running the report

The CRM6 report is run by branch. If the matter you are expecting to see does not appear, check the matter details in the matter to ensure that you are selecting the same branch as the matter is set up on.




# Is it a CRM7?

Tick Show Unavailable Matters when you have run validation - any CRM7 matters will appear here.

If a Proceedings Class matter exceeds the higher limit for Standard Fees there will be a memo entry on the list of matters for CRM6 when Show Unavailable Matters is ticked, showing the matter flagged for CRM7. You will need to run the CRM7 report from Reports > Miscellaneous > Contract Work Reports in order to report this matter.

