

How to produce the forms for the Legal Services Commission (Civil)

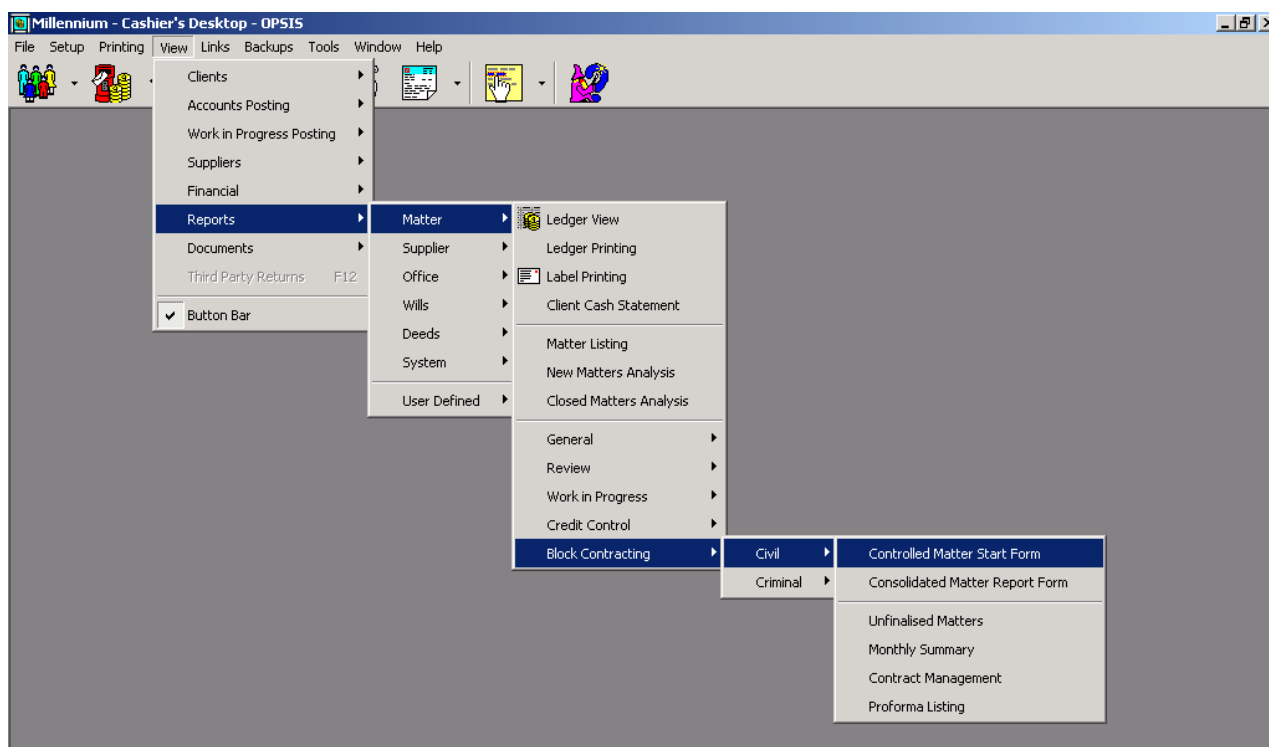
Within Millennium you can produce the following form(s) for the *Legal Services Commission*.

Controlled Matter Start Form

Controlled Matter Report Form (*commonly known as 'CMRF'*)

Both of these reports can be found by clicking on:-

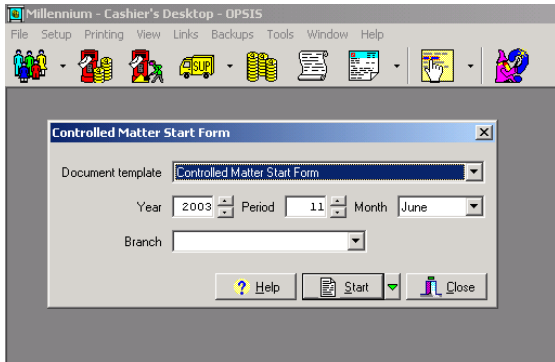
View>Reports>Matter>Contracting>Civil (see below)



To run the **‘Controlled Matter Start Form’**

Follow the steps above and then click on **‘Controlled Matter Start Form’**

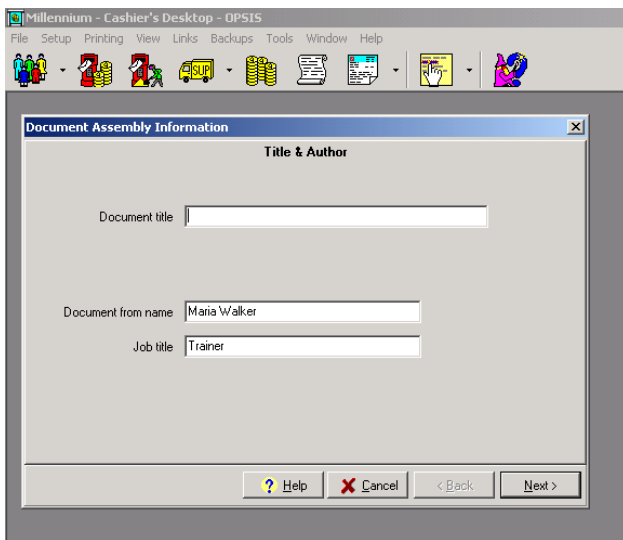
This will open up the following screen:-



The screen will always default to your previous month. Change the period number if you would like to see the report for the month you are currently working on.

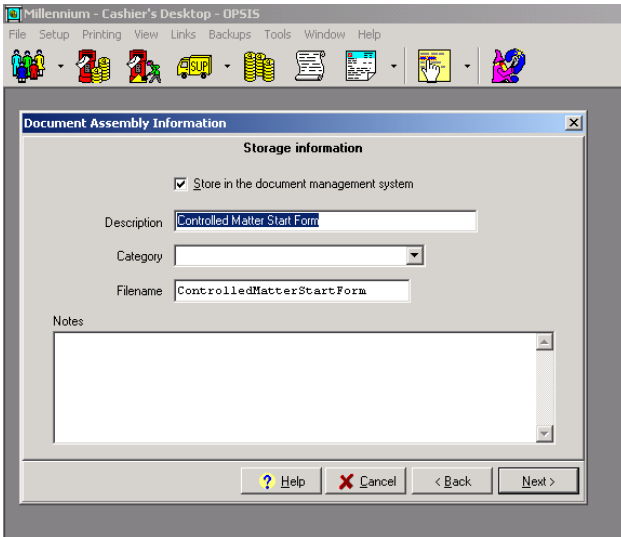
Now click on **‘Start’**

This will open up the following screen:-



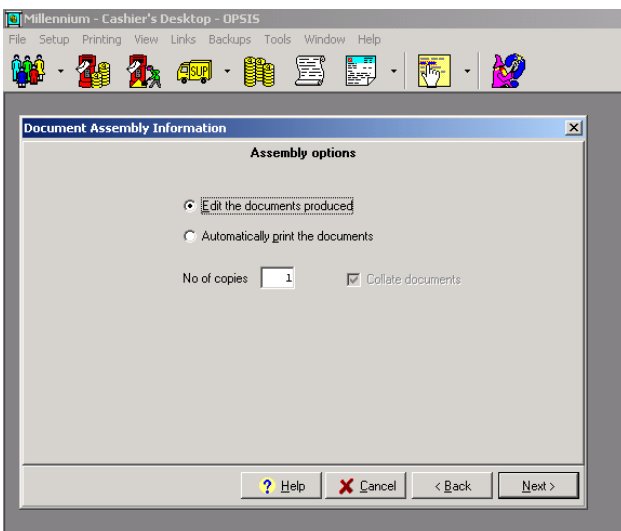
Click on **‘NEXT’**

This will open up the following screen:-



Leave all the descriptions as they appear in the boxes
Click on **‘NEXT’**

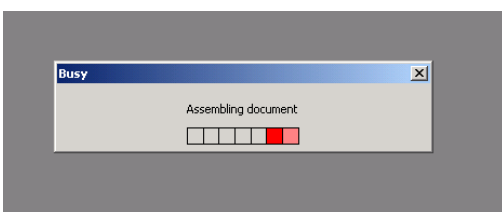
This will open up the following screen:-



By leaving the setting on **‘Edit the documents produced’** when the form opens up in Word, you have the opportunity to change any of the details

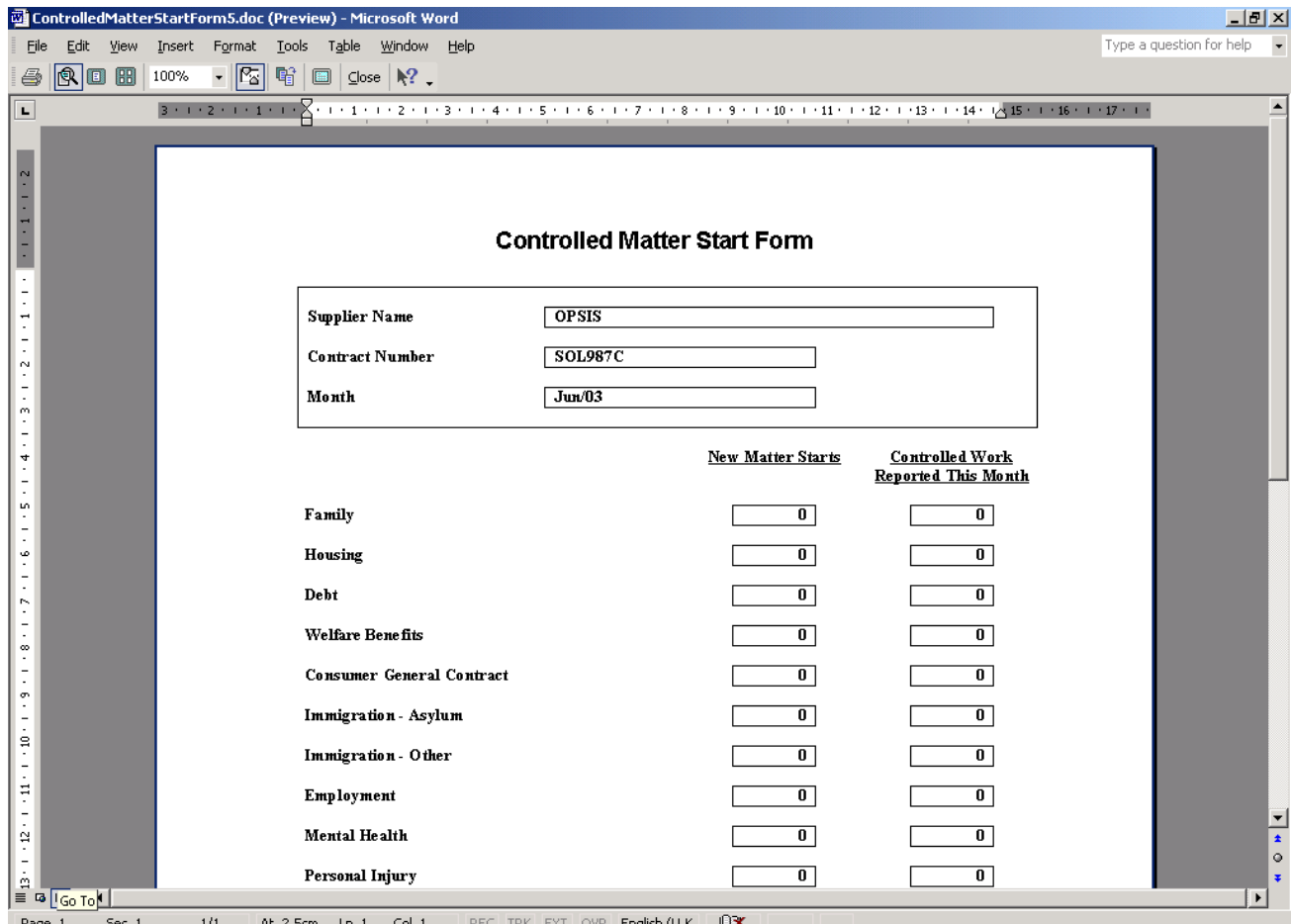
By changing the setting to **‘Automatically print the documents’** when the document is actually produced, the form will print out straight away, then bring straight back into Millennium.

Click on **‘NEXT’**



Microsoft Word will then open up, and whilst your system is producing the form, a message will pop up similar to that above.

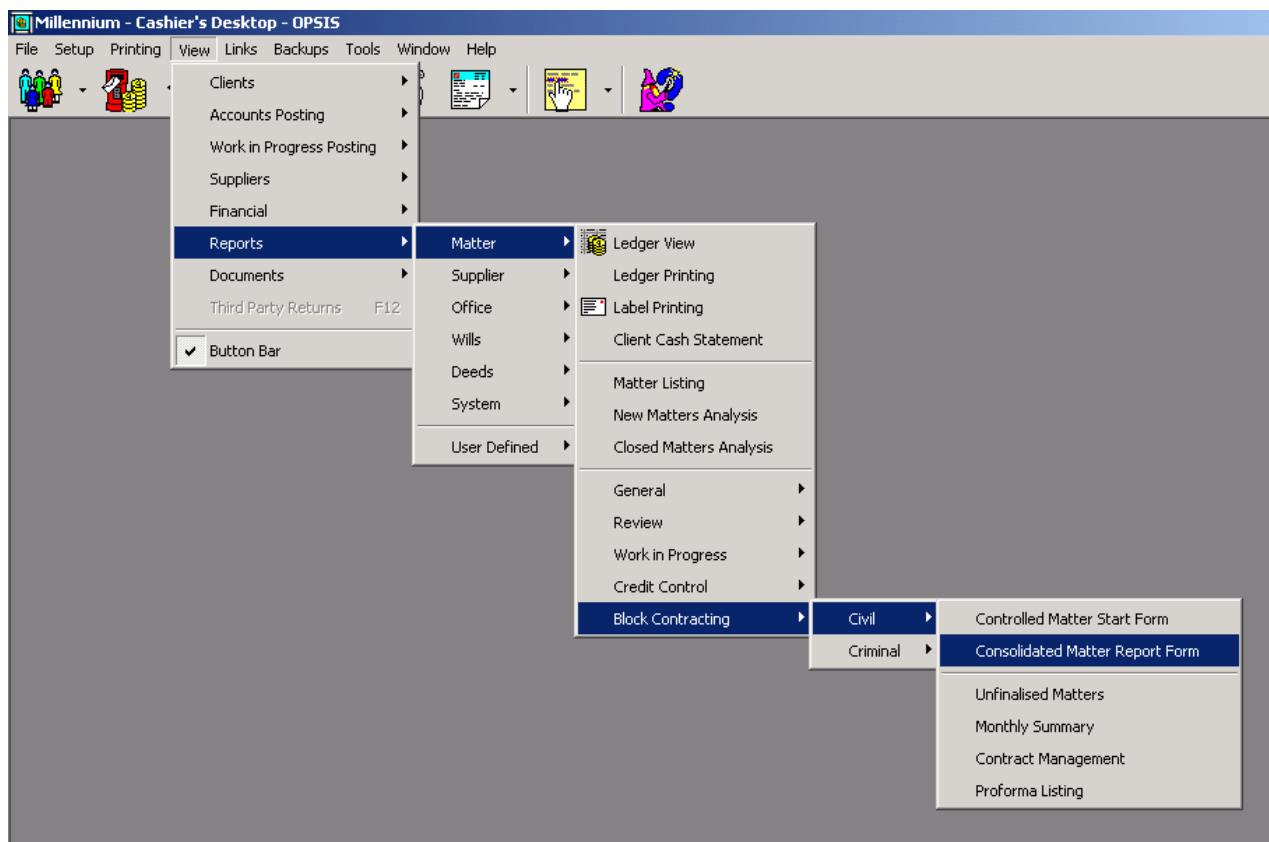
Your document will then appear in Word as below:-



This can now be printed out, and send to the Legal Services Commission as required.

To produce the ‘**Consolidated Matter Report Form**’.

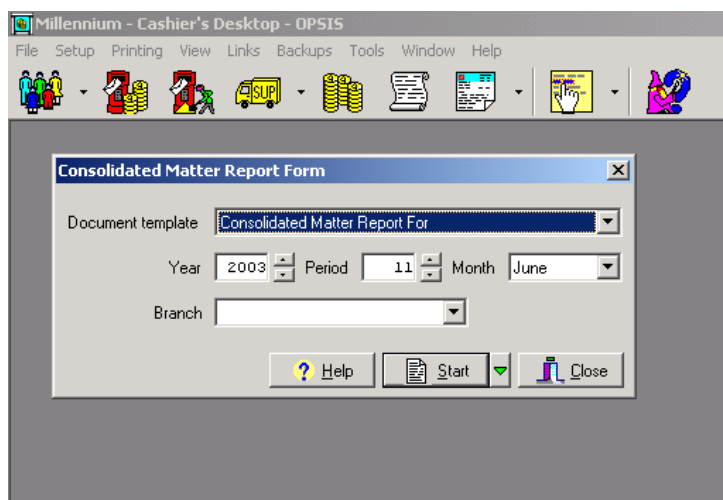
Go to **View>Reports>Matter>Contracting>Civil** (see below)



To run the ‘**Controlled Matter Report Form**’

Follow the steps above and then click on ‘**Controlled Matter Report Form**’

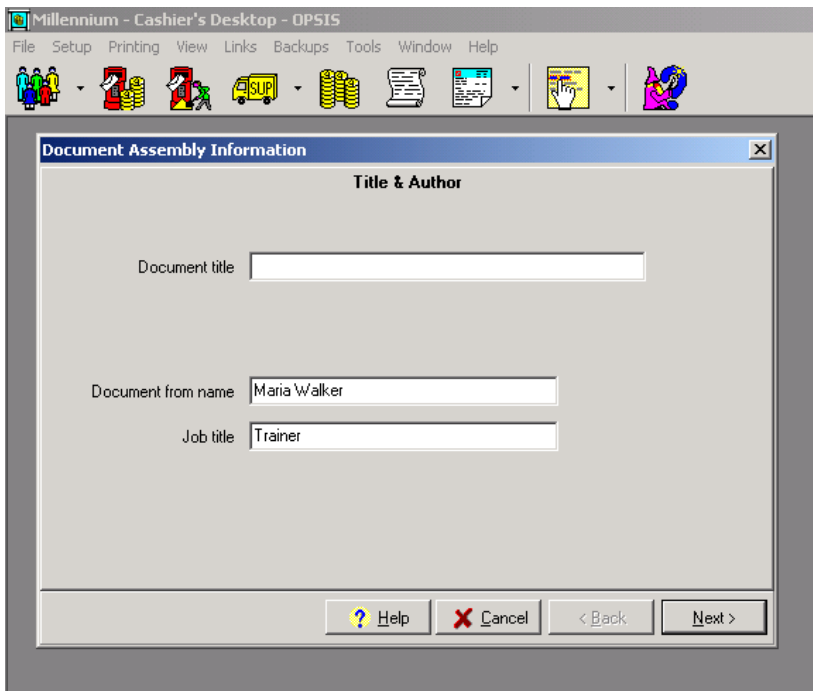
This will open up the following screen:-



The screen will always default to your previous month. Change the period number if you would like to see the report for the month you are currently working on.

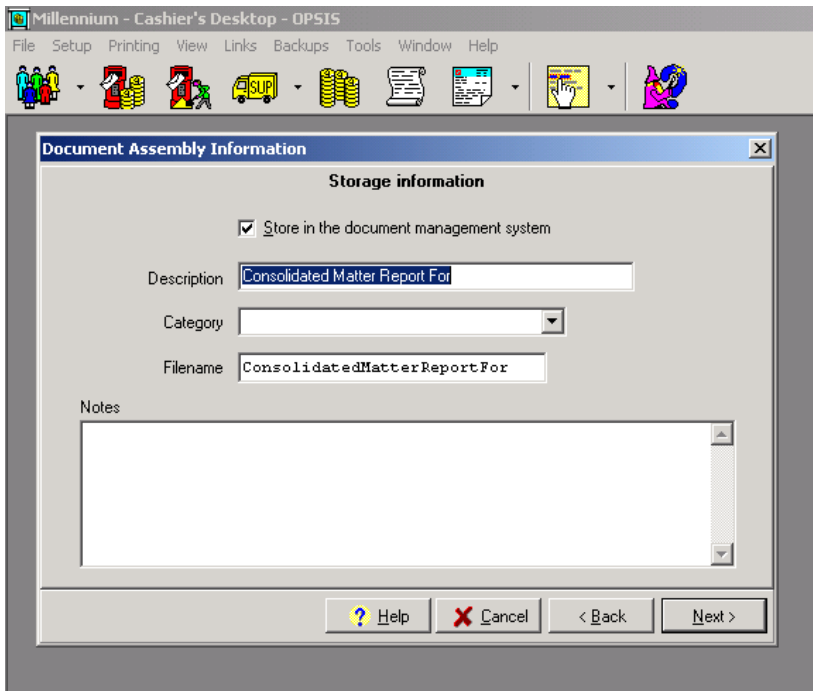
Now click on ‘Start’

This will open up the following screen:-



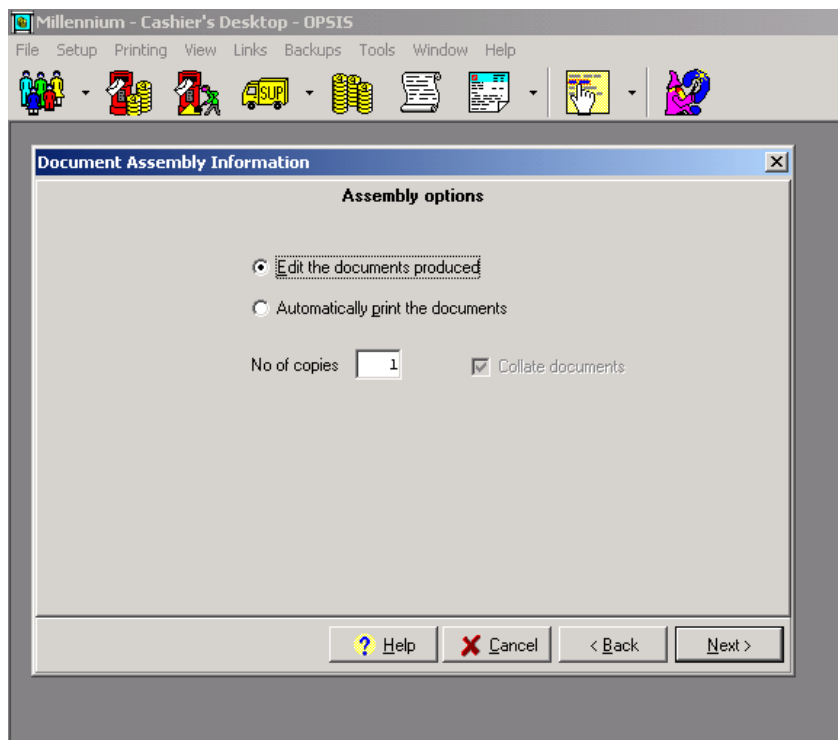
Click on ‘NEXT’

This will open up the following screen:-



Leave all the descriptions as they appear in the boxes
Click on ‘NEXT’

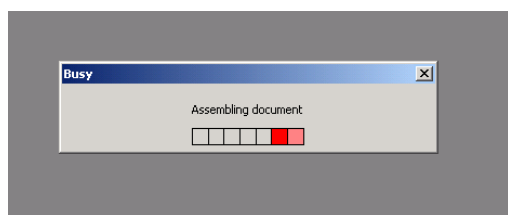
This will open up the following screen:-



By leaving the setting on ‘**Edit the documents produced**’ when the form opens up in Word, you have the opportunity to change any of the details

By changing the setting to ‘**Automatically print the documents**’ when the document is actually produced, the form will print out straight away, then bring straight back into Millennium.

Click on ‘**NEXT**’



Microsoft Word will then open up, and whilst your system is producing the form, a message will pop up similar to that above.

Your document will then appear in Word as below:-

ConsolidatedMatterReportFor4.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Type a question for help

85% Normal + 2 pt Times New Roman 2 B I U

Consolidated Matter Report Form

Contract No: SOL987C Month Jul / 2004 Sheet 1 of 1

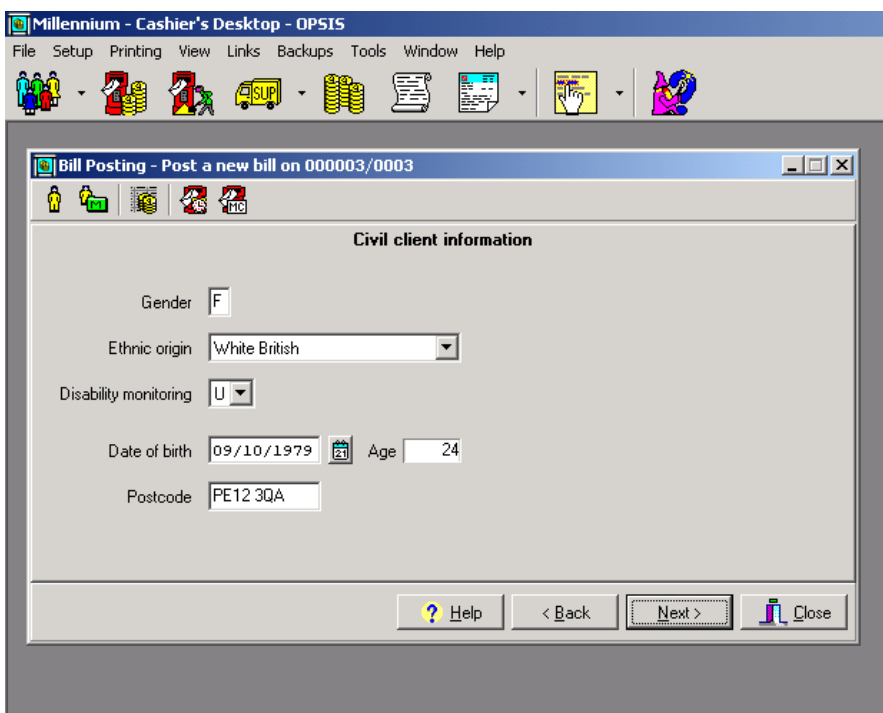
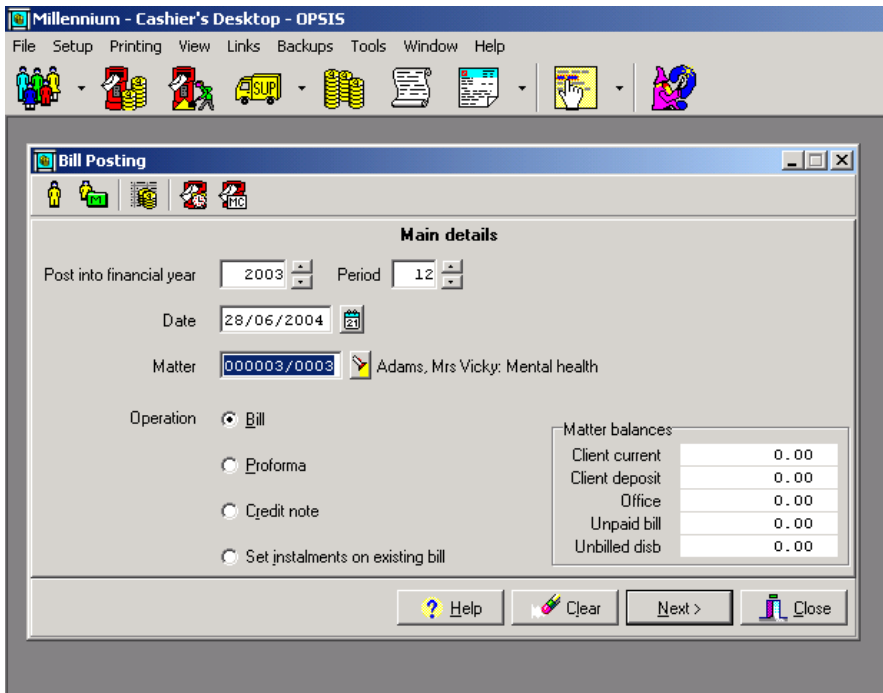
Case Reference	Client Name	Manager Case Number (Management & Administration only)	Case Type	Ethical region	Practice location	Agency	Postcode	Date Opened	Matter types Part I	Matter types Part II	Time (hours)	Profit costs	Disbursements	Counsel	End Point
000003/0002	Adams V.		F	01	U	A		02/02/2004	LAAS	BAI	0	£ 117.50	£ 0.00	£ 0.00	
000003/0003	Adams V.		F	01	U	A		05/05/2004	MHAF	PAT	0	£ 587.50	£ 587.50	£ 0.00	S P C
													Total Page Value	£ 1292.50	

Page 1 Sec 1 1/1 At 4.3cm Ln 1 Col 1 REC TRK EXT OVR English (U.K)

This can now be printed out, and send to the Legal Services Commission as required.

Within **Millennium** a report is produced at the end of each bill that has been entered which can be kept on the inside of your file. This will show what figures were used when billing.

You access this you will need to go through the billing screens as follows:-



Millennium - Cashier's Desktop - OPSIS

File Setup Printing View Links Backups Tools Window Help

Bill Posting - Post a new bill on 000003/0003

Civil claim information

Matter description: Mental health

SPAN description: Mental Health

Open date: 05/05/2004

SPAN types: Problem with treatment/care on release/aftercare

Client is patient (sectioned or not):

Work finished date: 28/06/2004 Immigration & asylum no:

SPAN end point 1: S Matter Concluded Otherwise

SPAN end point 2: P Significant Wider Public Benefits Achieved

SPAN end point 3: C Putting Case For The Client

Help < Back Next > Close

Millennium - Cashier's Desktop - OPSIS

File Setup Printing View Links Backups Tools Window Help

Bill Posting - Post a new bill on 000003/0003

Disbursements not yet paid out (future disbursements)

Totals: Non-VATable 0.00 VATable 0.00 VAT 0.00

Detail 1	Detail 2	Amount	VAT code	VAT	CF

+ Add - Remove

Detail: Amount (inc. VAT) 0.00

VAT code: Non VAT-able

Counsel fees VAT amount 0.00

Help < Back Next > Close

Millennium - Cashier's Desktop - OPSIS

File Setup Printing View Links Backups Tools Window Help

Bill Posting - Post a new bill on 000003/0003

Civil fee calculation

	Recorded	Claim	VAT	Total
Profit costs	278.66	278.66	48.77	327.43
Disbursements	13.50	13.50	2.36	15.86
Total claim	292.16	292.16	51.13	343.29
Disbursements				15.86
Counsel				0.00
Matter credit limit				0.00

Help < Back Next > Close

Millennium - Cashier's Desktop - OPSIS

File Setup Printing View Links Backups Tools Window Help

Bill Posting - Post a new bill on 000003/0003

Fee earner fee allocation

Total fee 278.66

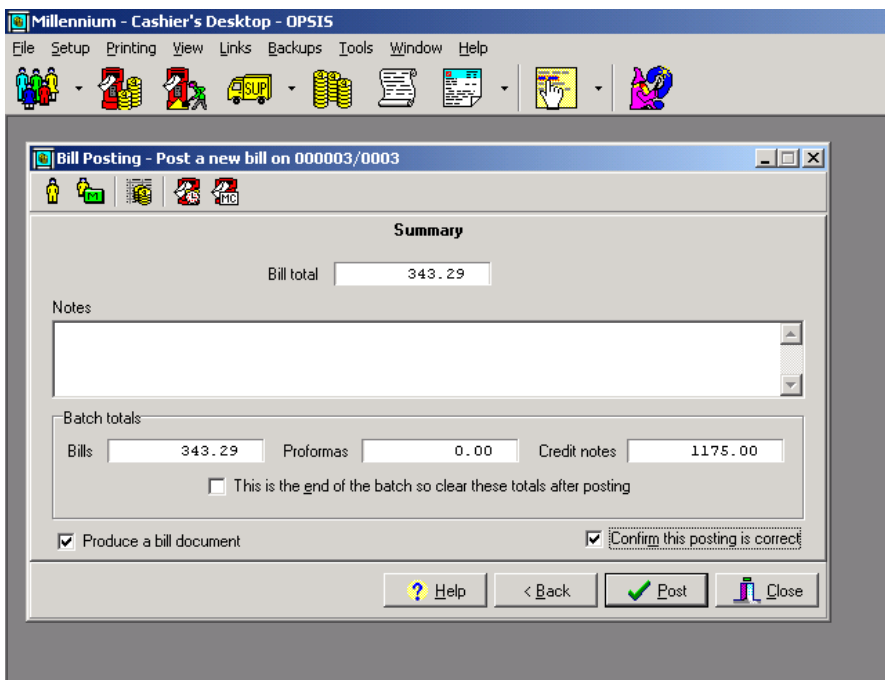
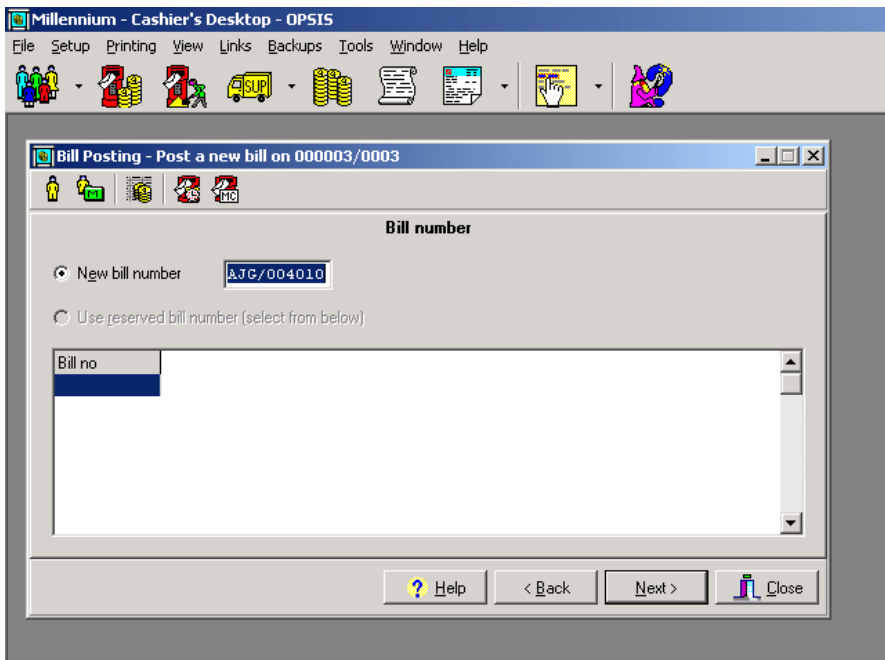
The following fee earners will have a share of the fee

Code	Name	Share
AJG	A. J. Grabbit	278.66

Share 278.66

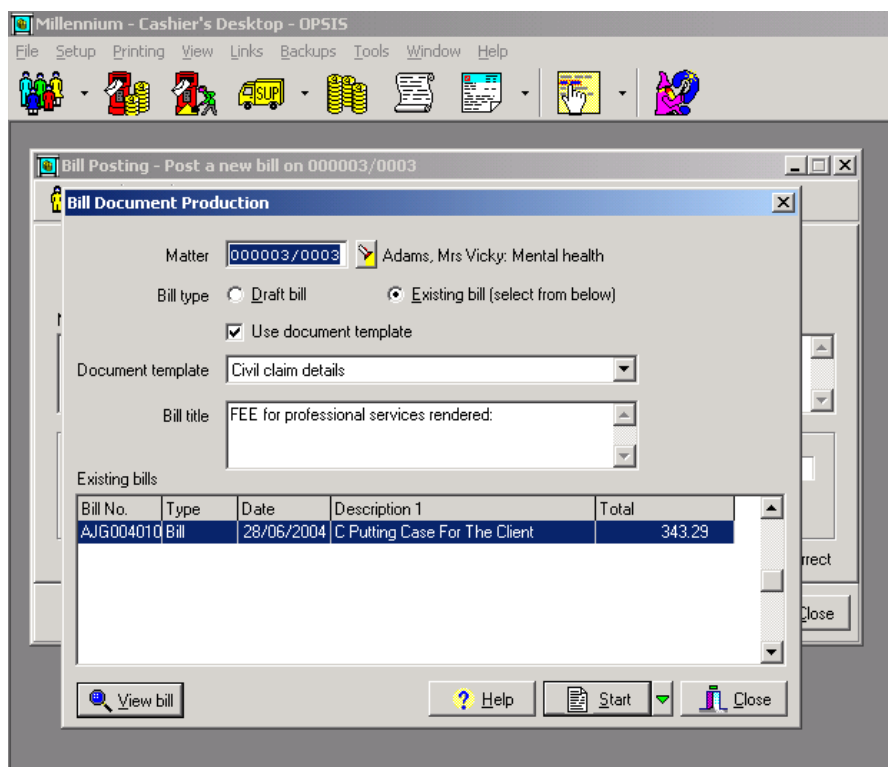
+ Add - Remove Adjust Pro rata

Help < Back Next > Close



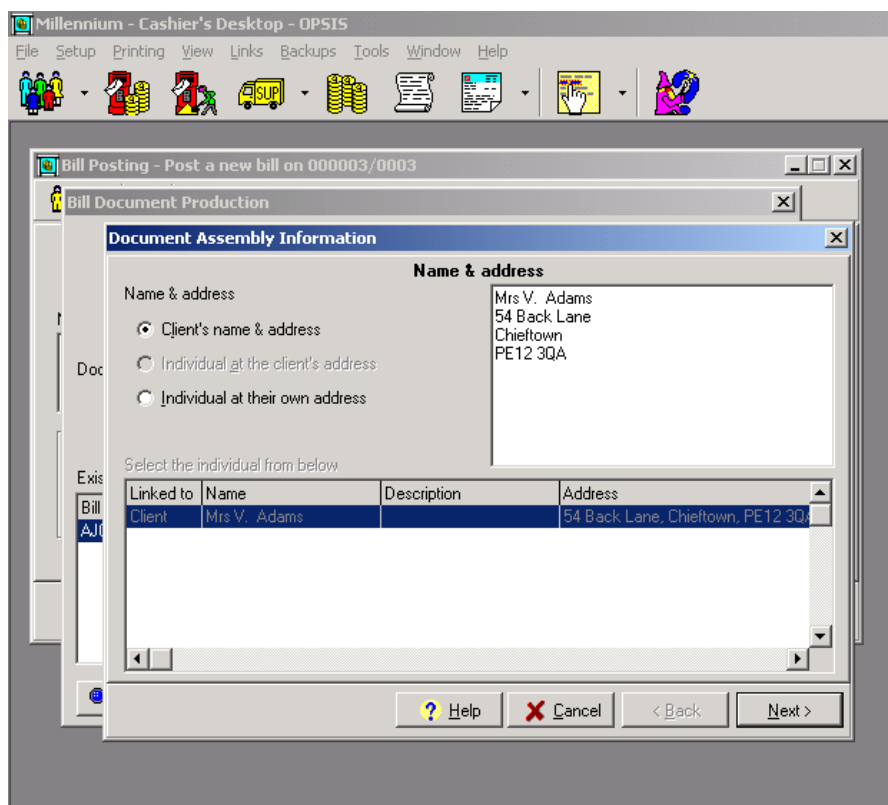
Before clicking on 'Post' the 'Produce a bill document' will need to be ticked as shown above.

Now 'Post' and the following screen will appear:-

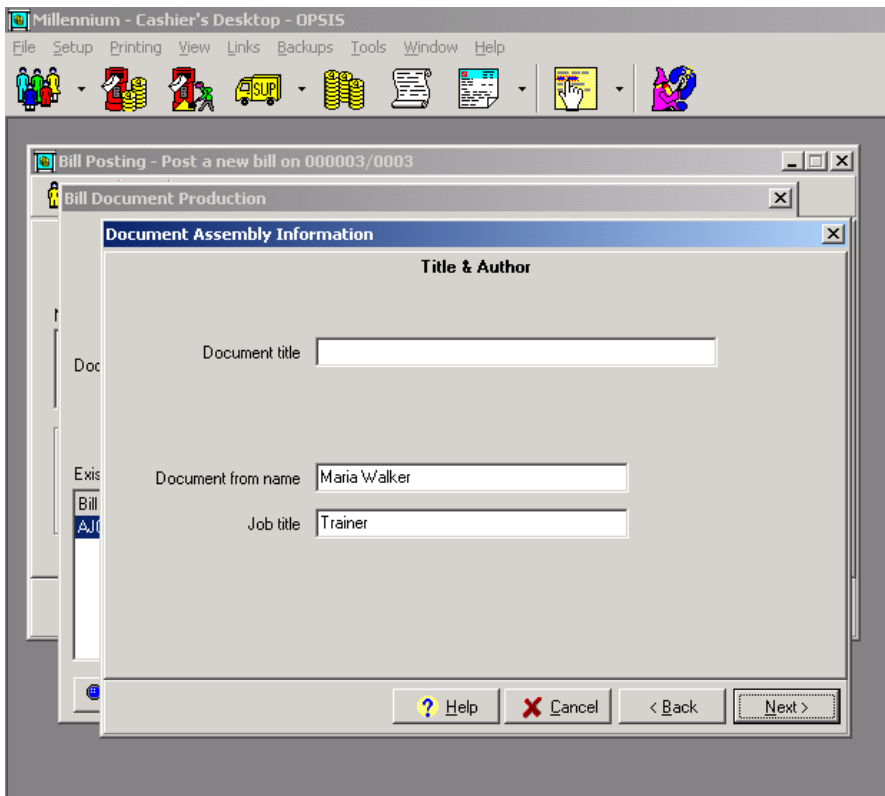


Generally the defaults can be left as they are, so **'Start'** needs to be clicked

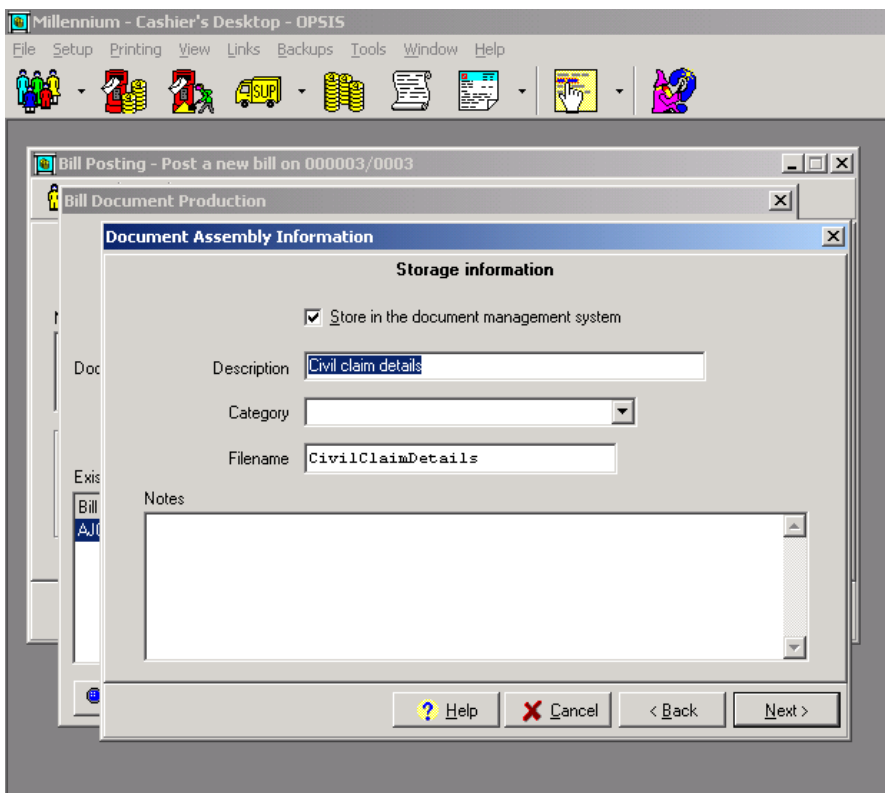
The following screen will now appear:-



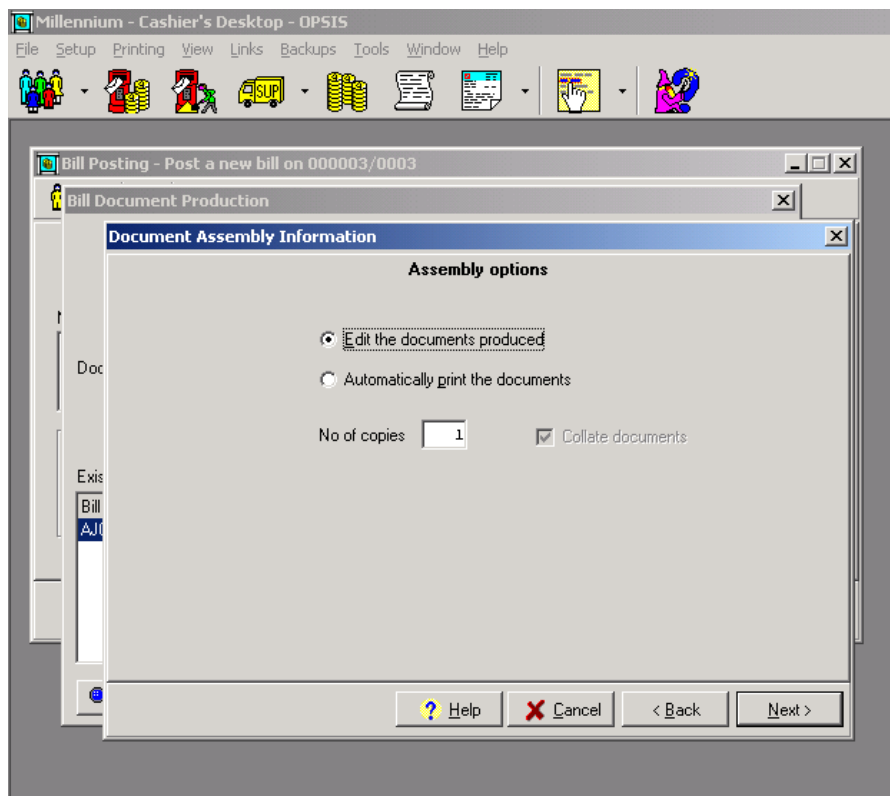
Click on **'NEXT'**



Leave all the descriptions as they appear in the boxes
Click on 'NEXT'



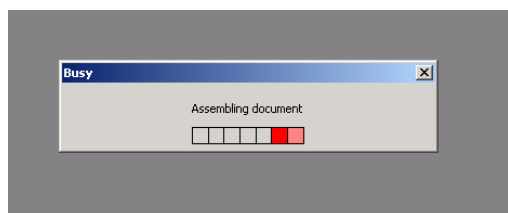
Leave all the descriptions as they appear in the boxes
Click on 'NEXT'



By leaving the setting on **‘Edit the documents produced’** when the form opens up in Word, you have the opportunity to change any of the details

By changing the setting to **‘Automatically print the documents’** when the document is actually produced, the form will print out straight away, then bring straight back into Millennium.

Click on **‘NEXT’**



Microsoft Word will then open up, and whilst your system is producing the form, a message will pop up similar to that above.

Your document will then appear in Word as below:-

ClaimDetails.doc (Preview) - Microsoft Word

Edit View Insert Format Tools Table Window Help

50% Close

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16

Civil Claim Details

Client name: Adams, Mrs Vicky Client/Matter Code: 000000003

Civil Client Info motion	
Subcategory: Writ/Insub	Order: P
Date of file: 09/01/09	Age: 48
Periodic: PE123Q4	Usage: Civil Practice (1 month) and 600 hours (max 600)

Civil Clm Info motion	
Matter description: Mental health	
SPNY description: Mental Health	
Order date: 05/05/09	
SPNY type: P/B/Case with a case/variation order/interim	
	Client a person (person of an act)
Work federal date: 08/06/09	
SPNY and para. 1: Mental Capacity Order/wise	
SPNY and para. 2: Significant Writs Public Statute Adversal	
SPNY and para. 3: Planning Case For The Client	

Bill/Event	
Client/Matter code: 000000003	
Bill date: 08/06/09	
Bill number: A10000010	
Bill period: 200912	

CRN Bill Summary				
	Revised	Chk in	Chk in Use	Chk in Total
Practitioner	276.00	276.00	48.77	227.23
Disbursements	13.50	13.50	2.36	15.86
Costs/Chk in	250.00	250.00	51.13	198.87
Case cost	0.00			
Matter resolution	0.00			