

File Review Note

Review Status:	«FR_DETAIL_FR_STATUS»
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File Review Details

Matter Number of File Reviewed:	«FR_DETAIL_FR_MATTER»
Fee Earner of File Reviewed:	«FR_DETAIL_FR_FEE_EARN»
Supervising Fee Earner of File Reviewed:	«FR_DETAIL_FR_SUP_FEE_EARN»
Department of File Reviewed:	«FR_DETAIL_FR_DEPT»
Office of File Reviewed:	«FR_DETAIL_FR_OFFICE»
Reason for Review:	«FR_DETAIL_FR_REV_REASON»
Date of File Review:	«FR_DETAIL_FR_DATE_REVIEW»
Name of Person Carrying Out File Review:	«FR_DETAIL_FR_REVIEWER»
Status of Person Carrying Out File Review:	«FR_DETAIL_FR_STAT_REVIEW»

Compliance Review

Client Due Diligence Completed?	«FR_INIT_REV_FR_CDD_COMP»
ID Obtained?	«FR_INIT_REV_FR_ID_OBTAIN»
Was Engagement Letter Sent?	«FR_INIT_REV_FR_CC_SENT»
Date Engagement Letter Sent?	«FR_INIT_REV_FR_D_CC_SENT»
Was Engagement Letter Signed and Returned?	«FR_INIT_REV_FR_CC_RET»
Date Engagement Letter Signed and Returned?	«FR_INIT_REV_FR_D_CC_RET»
Costs Estimate Given and Updated if Necessary?	«FR_INIT_REV_FR_COSTS»
Current Status of the Matter Easily Identifiable?	«FR_INIT_REV_FR_CURRENT_STAT»
Any Undertakings Have Been Recorded?	«FR_INIT_REV_FR_UNDER_REC»
All Outstanding Undertakings Discharged?	«FR_INIT_REV_FR_UNDER_DIS»

Legal Review

Matter Progressed in a Timely Manner	«FR_INIT_REV_FR_MAT_PROG»
Course of Action Offered/Taken Correct	«FR_INIT_REV_FR_COURSE_ACT»
All Appropriate Courses of Actions Considered	«FR_INIT_REV_FR_ALL_OPTS»
Accurate Legal Advice Given	«FR_INIT_REV_FR_QUAL_ACC»
Appropriate Legal Advice Given	«FR_INIT_REV_FR_QUAL_APP»
Complete Legal Advice Given	«FR_INIT_REV_FR_QUAL_COMP»

File Management Review

All Key Dates Recorded Correctly	«FR_INIT_REV_FR_KEY_DATES»
File Closed According to Procedure	«FR_INIT_REV_FR_FILE_CLOSED»
File Properly Maintained	«FR_INIT_REV_FR_FILE_MAINT»

File Review Outcome

Any corrective action required	«FR_CORR_ACT_FR_CORR_ACT»
Details of Corrective Action Required	«FR_CORR_ACT_FR_CORR_ACT_REQ»
Further Review Required	«FR_CORR_ACT_FR_FUR_REV»