File Review Note

Review Status:	{ MERGEFIELD FR_DETAIL_FR_STATUS }

File Review Details

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

Compliance Review

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

Legal Review

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

File Management Review

All Key Dates Recorded Correctly	{ MERGEFIELD FR_INIT_REV_FR_KEY_DATES }
File Closed According to Procedure	{ MERGEFIELD FR_INIT_REV_FR_FILE_CLOSED }
File Properly Maintained	{ MERGEFIELD FR_INIT_REV_FR_FILE_MAINT }

File Review Outcome

Any corrective action required	{ MERGEFIELD FR_CORR_ACT_FR_CORR_ACT }
Details of Corrective Action Required	{ MERGEFIELD FR_CORR_ACT_FR_CORR_ACT_REQ }
Further Review Required	{ MERGEFIELD FR_CORR_ACT_FR_FUR_REV }