COMMUNITY USER GUIDE

OUTSIDE COUNSEL CONTRACTS

October 29, 2020

Office of the Attorney General of Texas
Financial Litigation and Charitable Trust Division
## Table of Contents

**Contents**

Community Overview ................................................................................................................................... 4  
Agencies and Member Institutions ........................................................................................................... 4  
Activities and General Workflow........................................................................................................... 4  
Working in the Community ....................................................................................................................... 5  
Navigating to the Outside Counsel Contracts Community ....................................................................... 5  
Registration ............................................................................................................................................... 5  
Register for community access to your Agency .................................................................................... 5  
You can register as one of the following three roles depending on your agency responsibilities .............. 6  
  Requesting a new Agency .......................................................................................................................... 8  
Logging into the Community ................................................................................................................... 9  
  Login as a Registered User ......................................................................................................................... 9  
  Resetting your Password as a Registered User ....................................................................................... 9  
  Logging out of the Community .................................................................................................................. 10  
Requests to Retain .................................................................................................................................... 11  
  Working with a Request to Retain (“RTR”) .............................................................................................. 11  
  Creating a New Request to Retain ........................................................................................................... 13  
  Creating a Draft of you RTR ..................................................................................................................... 14  
  Editing a Draft RTR .................................................................................................................................. 18  
    Validation ................................................................................................................................................ 19  
  Working with Files ..................................................................................................................................... 20  
  Withdrawing the RTR ............................................................................................................................... 23  
  Submitting your RTR .............................................................................................................................. 25  
  Managing an existing RTR ....................................................................................................................... 27  
Managing Contracts .................................................................................................................................. 28  
  Viewing Contracts ................................................................................................................................... 28  
Contract Amendment .................................................................................................................................. 31  
  Working with a Request to Amend .......................................................................................................... 31  
  Creating a New Request for Amendment ............................................................................................... 33
Creating a Draft of your Request for Amendment ................................................................. 34
Validation .............................................................................................................................. 38
Submitting your Request for Amendment ........................................................................... 44
Withdrawing the Request for Amendment ............................................................................ 46
Managing an existing Request for Amendment ..................................................................... 48
Voucher Request .................................................................................................................. 49
Working with a Request for Voucher Approval ................................................................. 49
Creating a New Request for Voucher Approval ................................................................. 51
Creating a Draft of your Request for Voucher Approval .................................................... 52
Validation .............................................................................................................................. 56
Submitting your Request for Voucher Approval ................................................................. 62
Withdrawing the Request for Voucher Approval ................................................................. 65
Managing an existing Request for Voucher Approval ......................................................... 65
Community User Administration .......................................................................................... 66
Managing User Access Requests ......................................................................................... 66
Approving User Access Requests ....................................................................................... 68
Rejecting User Access Requests ........................................................................................ 70
Managing User Access Rights ............................................................................................ 71

Note: This application works best when accessed via the Google Chrome internet browser.
Community Overview
The Outside Counsel Contracts Community ("Community") provides state agencies, universities, and institutions of higher education with the ability to manage their interactions with the Office of the Attorney General ("OAG") regarding Outside Counsel Contracts. Through the Community, users may submit and manage requests for outside counsel contracts, requests for contract amendment, and requests for voucher approval. Community users can also manage additional users within their own organization, including providing those users with access appropriate for the activities they will perform within Community.

Agencies and Member Institutions

**Agencies** are the primary organization within Community. A user can only access contract information for an Agency for which they have registered and been granted access. An Agency can be designated as a Member Institution, which will always be subordinate to a parent Agency. Parent Agencies can access voucher information from any and all subordinate Member Institutions; Member Institutions can only access their own voucher information.

Member Institutions only have the ability to manage their own internal users and submit requests for voucher approval under the Parent Agency’s contracts. Member Institutions do not have the option or ability to view contracts or request contracts or amendments. Only Parent Agencies can view current contracts, request new contracts, or request modifications to existing contracts through an amendment.

This design allows Member Institutions to register for accounts and submit vouchers under their own institutions. To reiterate, because Member Institutions are all under the Parent Agency, they can submit vouchers under Parent Agency contracts, but only see requests from their own institution.

Activities and General Workflow
Based on their specific roles, Community users can perform the following activities through Community:

- Manage Agency users and user roles
- Create and submit Requests to Retain Outside Counsel
- Request contract modifications through Amendments
- Submit Request for Voucher Approval of Invoices

**Note:** Hovering over a Tooltip (indicated by ✉️) provides context-sensitive information relative to current activity.
Working in the Community

Navigating to the Outside Counsel Contracts Community
Access the Outside Counsel Contracts Community from the link on the OAG website.

https://www.texasattorneygeneral.gov/divisions/financial-litigation/outside-counsel-contracts

Note: Bookmark the URL for easy access.

Registration
Register for community access to your Agency

1. Select “Register” from the login page.
2. Select your Agency using the Agency Search drop down.

Using the “Search for an Agency” tool

a. Search for the Agency for which you wish to register by entering the agency name or some part of the agency name and either selecting “Enter” on your keyboard or by selecting the “Search” button. This will present you with a list of possible matches from which to select.

b. Alternatively, you leave the search box blank and either selecting “Enter” on your keyboard or by selecting the “Search” button. This will return a list of all agencies in the Community from which to select.

Note: If your Agency is not in the list of Agencies, you may request that it be added. See the section “Request to Add Agency”.

2. Select a Role within the Agency from the Role dropdown.

You can register as one of the following three roles depending on your agency responsibilities.

- **Agency Head** – The Agency Head is responsible for administering the rights for users with Contract and Voucher Requester roles for their agency. Additionally, the Agency Head for Parent Agencies and independent agencies will also have the rights of the Contract and Voucher Requester role. By contrast, Agency Heads of Member Institutions will only have the additional rights of the Voucher Requester role. The Agency Head is the only role which must be approved by the OAG, but an Agency Head can add additional Community Users for their Agency (see the User Administration section, below). A Community user may register as Agency Head for more than one Agency, but an Agency can only have one Agency Head. An Agency Head can delegate their responsibility by providing administrative rights to a registered Agency user as required. Each Agency is responsible for selecting its own Agency Head based on who would be in the best position to monitor users and review and approve
system access requests. For more information about managing user access requests, please see the Community User Administration section of this guide.

- **Contract and Voucher Requester.** By default, a Contract and Voucher Requester has access to all Community activities except for user administration. However, an Agency Head may grant them administrative access in exceptional circumstances. Agencies may have more than one Contract and Voucher Requester.

- **Voucher Requester.** A Voucher Requester may only view and submit information and documents related to requests for voucher approval for their Agency. An Agency may have more than one Voucher Requester. A Voucher Requester is not required if a user with the Contract and Voucher Requester role will manage Voucher Requests for the agency.

**Note:** A user may register for different roles within different Agencies.

3. Enter your information and select “Register”. You will receive a confirmation email that your registration request has been submitted and another with your login information once your request has been approved, either by the OAG (if you are an Agency Head) or by your Agency Head (if you are a Contract and Voucher Requestor or a Voucher Requestor). See the User Administration section, below, for more details.
The following screen is displayed confirming your submission.

![Confirmation Screen](image)

**Requesting a new Agency**

If your agency is not yet in the Community,

1. Select “Request a New Agency”

![Request New Agency Screen](image)

2. Enter the requested information and select “Request”. You will receive a confirmation email that your request has been submitted to the OAG for evaluation and another notifying you that you may register with the new Agency once the OAG has approved your request.
Logging into the Community
Login as a Registered User

1. Enter your user ID and password and select “Log in” and you will be taken to your Community Home Page with a listing of agencies for which you have registered and been approved.

Resetting your Password as a Registered User
1. Select “Forgot password?” at the bottom of the Login page.
2. Enter the username you received when you registered for Community access and select “Reset Password”. You will receive an email notification with instructions to reset your password.

Logging out of the Community
1. Select the Icon in the top right of any page.
2. Select Logout from the dropdown.
Requests to Retain
Working with a Request to Retain (“RTR”)

1. Log in to the Community

The list of agencies you have access to are displayed with your rights within the agency. If the agency you need is not displayed or you don’t have the rights you need, you may request changes to your Community access by selecting the “Request Additional Access” button.

2. Select the link for the agency you need to work with from the Agency Name column.

3. Select the “Contracts” button to manage Requests to Retain, Contracts and Amendments
4. Select the “Request to Retain” button from the Contract Management Section to display a list of existing RTRs for your agency.
Creating a New Request to Retain

1. Select “New” to display the new RTR screen and enter the required information or attach the required files (See Working with Files).
Creating a Draft of your RTR

Creating a draft of your RTR allows you to save your work and complete the RTR later. To save a draft of your RTR you must at least enter the start and end dates of the proposed contract.
Save

1. Select “Save” to save a draft of your RTR. Your RTR is saved as a draft and appears in “View” mode.
2. Select “Edit” to continue editing the current draft RTR.
3. Select “Return” to return to the list of RTRs. Your draft RTR will appear on the list in draft status.
Editing a Draft RTR
1. Select “View” on the row of the draft RTR you want to continue editing.
Validation
Any time work is saved, validation is run in the background to update a list of remaining items which must be entered or attached before the RTR can be submitted to OAG for approval. The Validation results are displayed at the bottom of the new RTR screen.
Working with Files
The following files must be attached to pass validation and allow for submission:

- Affirmation Statement
- Conflicts Disclosure
- Eligibility to Practice Law

Other files may be required depending on your selections while filling out the RTR. They will be identified as required when you attempt to save the RTR.

Attaching Files
1. Select “View Files” while viewing the draft to go to the files section. (View Files is not available while in edit mode).

2. Select “Add File” to go to the Add File dialogue.
3. Select file type from the File Type dropdown and select “Next”.

![Add File dialog box](image)
4. Select “Upload File”, choose the file you want to upload, and select “Open”.

Alternatively, you can drag and drop your files to the File upload area

Note: The file upload will begin immediately
This screen will display showing the progress of your file upload.

Once the file has been uploaded it will be displayed in the Files section.

Withdrawing the RTR
The RTR can be withdrawn prior to submission to the OAG.
1. Select “Withdraw” while viewing the draft. (Withdraw will not display in Edit mode)
Submitting your RTR

Once all the required items have been provided and no more items are listed in the validation section “Submit” is displayed.

1. Select “Submit” to submit the RTR to the OAG for review.
2. Select “Return” and the contract amendment will be displayed in the Contract Amendments List with a status of Submitted.
Managing an existing RTR

1. Select “View” to work with an RTR. If the RTR is still in draft mode, you may make edits until you have submitted the RTR for review. Submitted RTRs can only be viewed; they cannot be edited. However, if the RTR is returned to you with a request for edits, you will then be able to edit the information/data in the RTR or add/replace files as requested.

Note: Only files uploaded or created in the system after Oct. 31, 2020 will viewable.
Managing Contracts

Viewing Contracts

You can view contracts that have been executed by going to the Contracts tab. You can also initiate an Amendment or Voucher Request directly from the Contracts page.

1. Log in to the Community

The list of agencies you have access to are displayed with your rights within the agency. If the agency you need is not displayed or you don’t have the rights you need, you may request changes to your Community access by selecting the “Request Additional Access” button.

2. Select the link for the agency you need to work with from the Agency Name column.

3. Select the “Contracts” button to manage Requests to Retain, Contracts and Amendments
4. Select “Contracts” from the Contract Management Section to display a list of executed Contracts for your agency.

5. Select “View” on the row of the Contract you want to view.
You can view the most recent contract detail as per the last executed amendment. Additionally, you can initiate the following tasks:

1. Select “View Files” to see the files attached to the contract, including the executed contract itself, if available.

**Note:** Only files uploaded or created in the system after Oct. 31, 2020 will viewable.

2. Select “Create Amendment” to create a Contract Amendment Request as described in the Amendment Request Section of this document.
3. Select “Create Voucher” to create a Voucher Request as described in the Voucher Request Section of this document.
Contract Amendment
Working with a Request to Amend

1. Log in to the Community

The list of agencies you have access to are displayed with your rights within the agency. If the agency you need is not displayed or you don’t have the rights you need, you may request changes to your Community access by selecting the “Request Additional Access” button.

2. Select the link for the agency you need to work with from the Agency Name column.

3. Select “Contracts”
4. Select “Contract Amendment” from the Contract Management Section to display a list of existing Requests for Amendment for your agency.
Creating a New Request for Amendment

1. Select “New” to display the new Request for Amendment screen and enter the required information or attach the required files (See Working with Files).
Creating a Draft of your Request for Amendment

Creating a draft of the Request for Amendment allows you to save your work and complete the Request for Amendment later. To save a draft of your Request for Amendment you must enter a valid Contract ID.

1. Enter a valid Contract ID for the Agency and select Enter. If the contract number entered is a valid contract for your agency, the contract will be displayed. Select the Contract Number. (You will be unable to amend an expired contract)
Save

1. Select “Save” to save a draft of your Request for Amendment. Your Request for Amendment is saved as a draft and appears in “View” mode.
Edit

1. Select “Edit” to continue editing your draft Request for Amendment.
Return

1. Select “Return” to return to the list of Requests for Contract Amendment. Your draft Request for Amendment will appear in the list in draft status.
Validation

Any time work is saved, validation is run in the background to update a list of remaining items which must be entered or attached before the Request for Amendment can be submitted. The Validation results are displayed at the bottom of the new screen.
Once you have entered all required information the validation section will let you know that the Amendment is valid and thus may be submitted to OAG for review.
Working with Files

Attaching Files

1. Select “View Files” while viewing the draft to go to the files section. (View Files is not available while in edit mode).

2. Select “Add File” to go to the Add File dialogue.
3. Select file type from the File Type dropdown and select “Next”.

![Image of Add File dialog box]

Once your request has been validated, click the 'Submit' button to send your request to the OAG.
4. Select “Upload File”, choose the file you want to upload, and select “Open”.

Alternatively, you can drag and drop your files to the File upload area

Note: The file upload will begin immediately
This screen will display showing the progress of your file upload.

Once the file has been uploaded it will be displayed in the Files section.
Submitting your Request for Amendment

Once all the required items have been provided and no more items are listed in the validation section “Submit” is displayed.

1. Select “Submit” to submit the Request for Amendment to the OAG for review.
2. Select “Return” and the contract amendment will be displayed in the Contract Amendments List with a status of Submitted.
Withdrawing the Request for Amendment

The Request for Amendment can only be withdrawn prior to submission to the OAG.

1. Select “Withdraw” while viewing the draft. (Withdraw will not display in Edit mode)
2. Enter the reason for withdrawing the request and select “Save”
Managing an existing Request for Amendment

1. Select “View” to work with a Request for Amendment. If the Request for Amendment is still in draft mode, you may make edits until you have submitted the Request for Amendment for review. Once you have submitted the Request for Amendment you can only view the Request for Amendment. However, if the Request for Amendment is returned to you with a request for edits, you will be able to edit the Request for Amendment as requested.

Note: Only files uploaded or created in the system after Oct. 31, 2020 will viewable.
Voucher Request
Working with a Request for Voucher Approval

1. Log in to the Community

The list of agencies you have access to are displayed with your rights within the agency. If the agency you need is not displayed or you don’t have the rights you need, you may request changes to your Community access by selecting the “Request Additional Access” button.

2. Select the link for the agency you need to work with from the Agency Name column.
3. Select “Vouchers” to display a list of existing Requests for Voucher Approval for your agency.
Creating a New Request for Voucher Approval

1. Select “New” to display the new Request for Voucher Approval screen and enter the required information or attach the required files (See Working with Files).
Creating a Draft of your Request for Voucher Approval

Creating a draft of the Request for Voucher Approval allows you to save your work and complete the Request for Voucher Approval later. To save a draft of your Request for Voucher Approval you must enter a valid Contract ID and select “Enter”. If the Contract ID is valid it will display to left under Contract ID.
Save

1. Select “Save” to save a draft of your Request for Voucher Approval. A draft of your voucher request will be displayed in “View” mode.
2. Select “Edit” to continue editing your Request for Voucher Approval
Return

1. Select “Return” to return to the list of Requests for Voucher Approval. Your draft Request for Voucher Approval will appear in the list in draft status.
Validation
Any time work is saved, validation is run in the background to update a list of remaining items which must be entered or attached before the Request for Voucher Approval can be submitted. The Validation results are displayed at the bottom of the new screen.
Once you have entered all required information the validation section will let you know the Request for Voucher Approval is valid and thus may be submitted to OAG for review.
Working with Files
At least one invoice must be attached to pass validation and allow for submission:

Attaching Files
1. Select “View Files” while viewing the draft to go to the files section. (View Files is not available while in edit mode).

2. Select “Add File” to go to the Add File dialogue.
3. Select file type from the File Type dropdown and select “Next”.

![Add File dialog box with 'Select One' dropdown and 'Next' button]
4. Select “Upload File”, choose the file you want to upload, and select “Open”.

Alternatively, you can drag and drop your files to the File upload area

Note: The file upload will begin immediately
This screen will display showing the progress of your file upload.

Once the file has been uploaded it will be displayed in the Files section.
Submitting your Request for Voucher Approval

Once all the required items have been provided and no more items are listed in the validation section “Submit” is displayed.

1. Select “Submit” to submit the Request for Voucher Approval to the OAG for review.
After submission the Request for Voucher Approval will be displayed on the Requests for Voucher Approval List with a status of Submitted.
If the date the Request was Approved by the agency is more than twenty-five days after receipt of the invoice(s) from outside counsel, you will be requested to supply a reason before completing the submission.
Withdrawing the Request for Voucher Approval
The Request for Voucher Approval can only be withdrawn prior to submission to the OAG.
1. Select “Withdraw” while viewing the draft. (Withdraw will not display in Edit mode)

Managing an existing Request for Voucher Approval

1. Select “View” to work with an existing Request for Voucher Approval. If the Request for Voucher Approval is still in draft mode, you may make edits until you have submitted the Request for Voucher Approval. Once you have submitted the Request for Voucher Approval you can only view the Request for Voucher Approval. However, If the Request for Voucher Approval is returned to you with a request for edits you will be able to edit the Request for Voucher Approval as requested.

Note: Only files uploaded or created in the system after Oct. 31, 2020 will viewable.
Community User Administration
Every Agency must have a “Head of Agency” user to work within Community. The Head of Agency has the responsibility for approving or rejecting user access requests for Community access to perform roles within their agency. In addition to managing user access requests they can change the rights of a registered user as needed by their agency. For instance, a user can be given the right to manage user roles in behalf of the Head of Agency while they remain in another role.

Managing User Access Requests
1. Log into the Community (Head of Agency)
2. Select the Admin button from your Community Homepage to administer your agency user rights.

3. Select “User Access Requests” to view a listing of all user access requests for the agency and their status.
4. Select “View” on the row of the Pending Request you wish to evaluate.
Approving User Access Requests

1. Select “Approve”. The User Access Request List will display with the user’s request status updated to Approved.
They are now a registered user of the Community for your agency.
Rejecting User Access Requests

1. Select “Reject” and a pop-up will be displayed requesting the reason for rejection.

2. Enter the reason for rejecting the User Access Request and select “Save”. The User Access Request List will display with the user’s request status updated to Rejected. The requester will receive an email notifying them of the rejection and reason.
Managing User Access Rights

1. Select “User Access” to display a list of registered users and their rights.

2. Select “View” on the row of the user you want to change permissions.
3. Select or deselect the rights of the user by checking or unchecking the checkboxes and select “Save”. The changes to the user’s rights are displayed on the User Access List.