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# COMMUNITY USER GUIDE

## OUTSIDE COUNSEL CONTRACTS

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October 29, 2020

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

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**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.

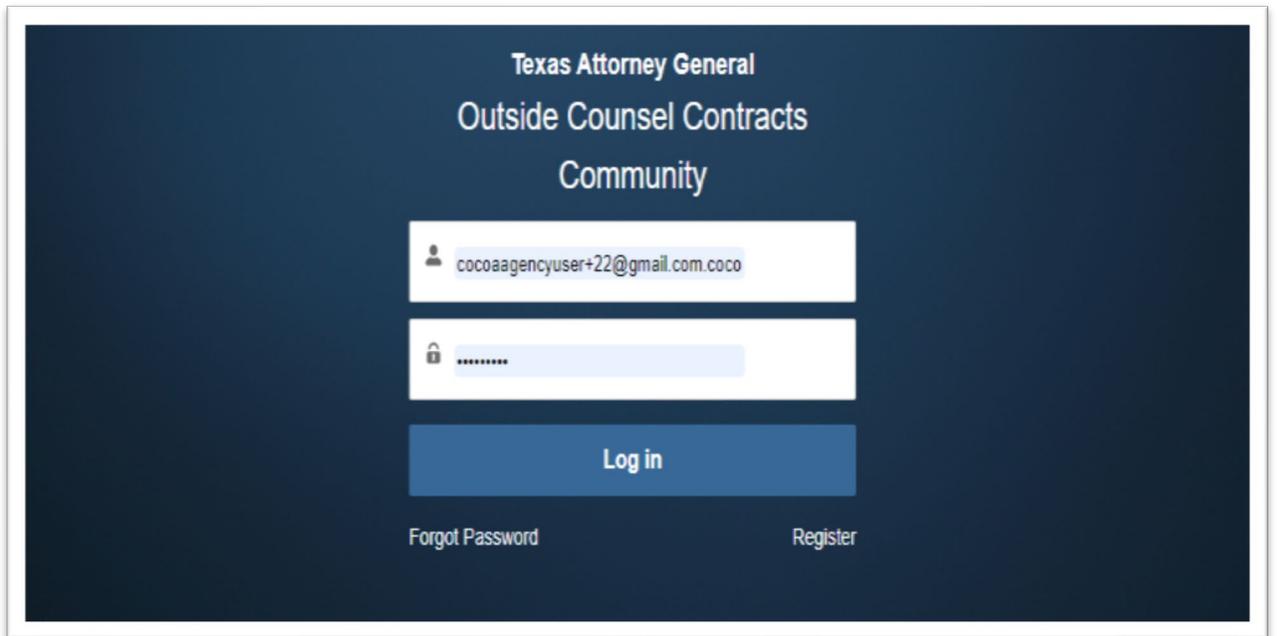
<https://www.texasattorneygeneral.gov/divisions/financial-litigation/outside-counsel-contracts>

**Note:** Bookmark the URL for easy access.

### Registration

Register for community access to your Agency

1. Select “Register” from the login page.

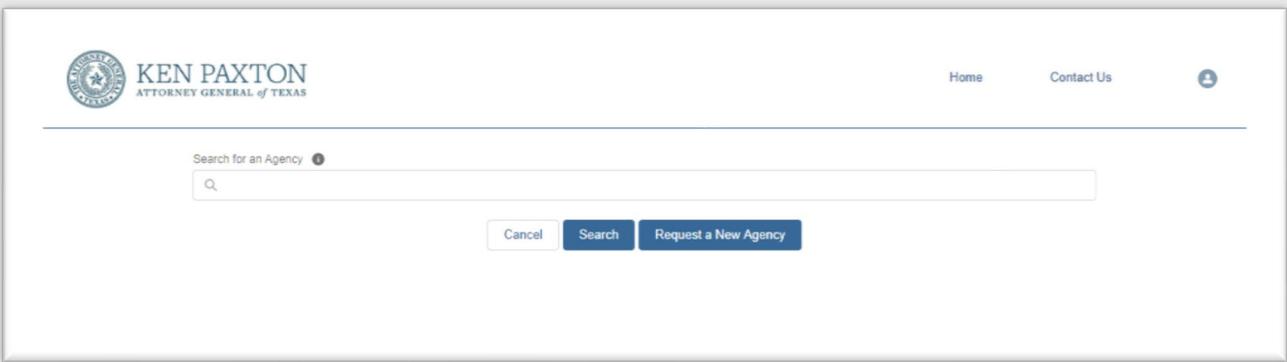


The screenshot shows a dark blue login page for the Texas Attorney General's Outside Counsel Contracts Community. At the top, the text reads "Texas Attorney General", "Outside Counsel Contracts", and "Community". Below this, there are two input fields: the first contains the email address "cocoaagencyuser+22@gmail.com.coco" and the second contains a masked password "\*\*\*\*\*". A blue "Log in" button is positioned below the password field. At the bottom of the page, there are two links: "Forgot Password" on the left and "Register" on the right.

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.

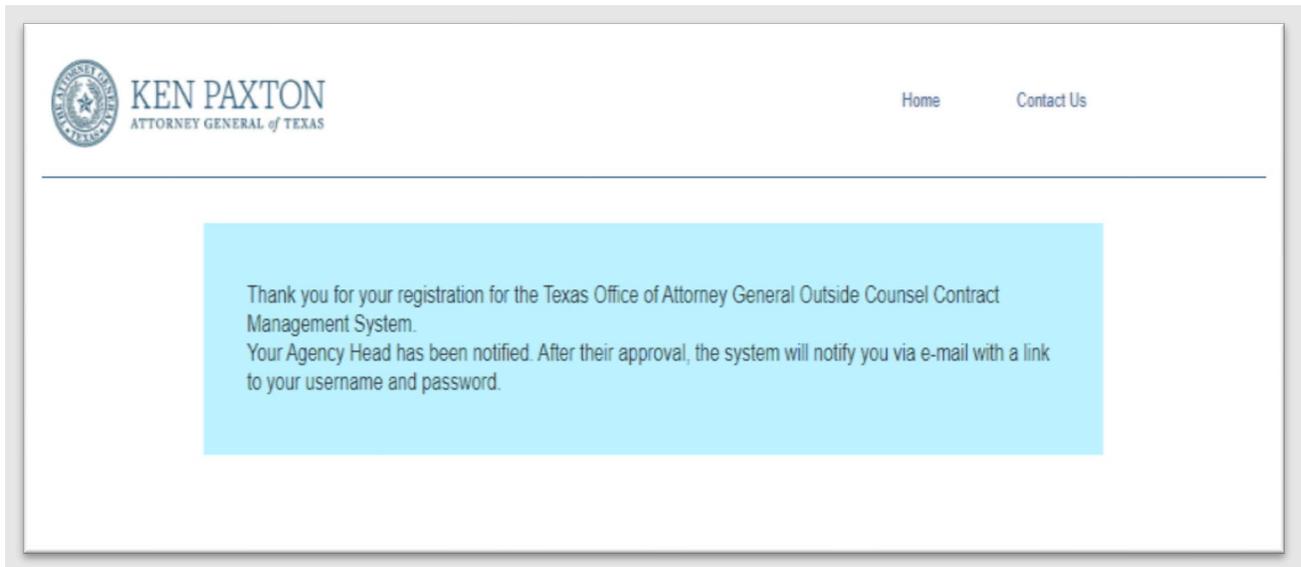
3. Enter your information and select “Register”. You will receive a confirmation email that your registration request has been submitted and another with your login information once your request has been approved, either by the OAG (if you are an Agency Head) or by your Agency Head (if you are a Contract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

The screenshot shows a registration form on the Ken Paxton Attorney General of Texas website. The header includes the state seal and the text 'KEN PAXTON ATTORNEY GENERAL of TEXAS', along with 'Home' and 'Contact Us' links. The form contains the following fields and options:

- Search for an Agency:** A search bar with the text 'Mount' and a clear button.
- Agency Name:** A dropdown menu showing 'Mount Pilot (400)'.
- \*Role:** A dropdown menu showing 'Contract and Voucher Requester'.
- Title:** A text input field containing 'Division Chief'.
- \*First Name:** A text input field containing 'Andy'.
- \*Last Name:** A text input field containing 'Taylor'.
- \*Phone:** A text input field containing '5555555555'.
- \*Email:** A text input field containing 'cocoaagencyuser+22@gmail.com'.

At the bottom of the form are two buttons: 'Cancel' and 'Register'.

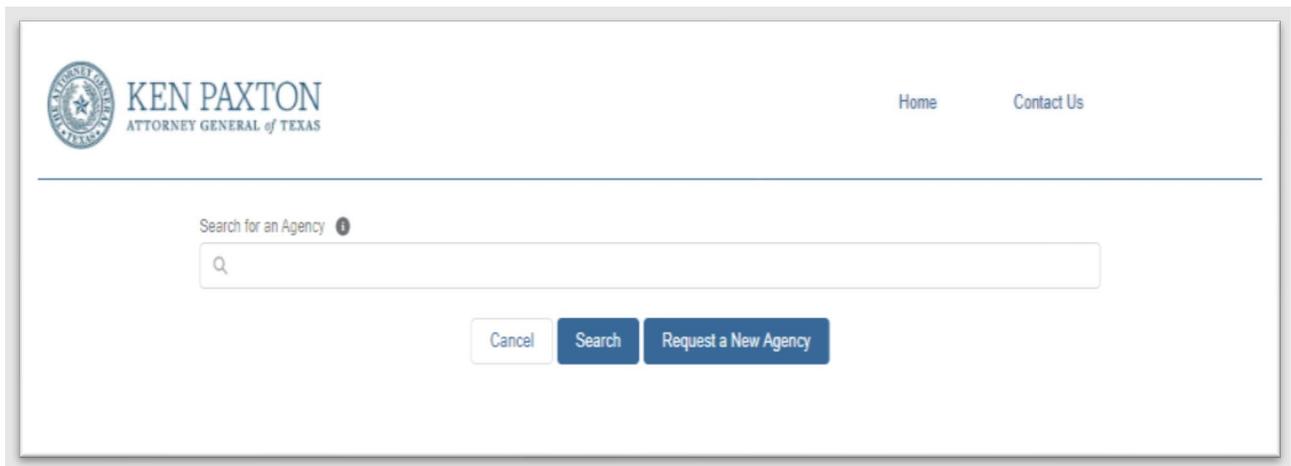
The following screen is displayed confirming your submission.



## Requesting a new Agency

If your agency is not yet in the Community,

1. Select "Request a New Agency"

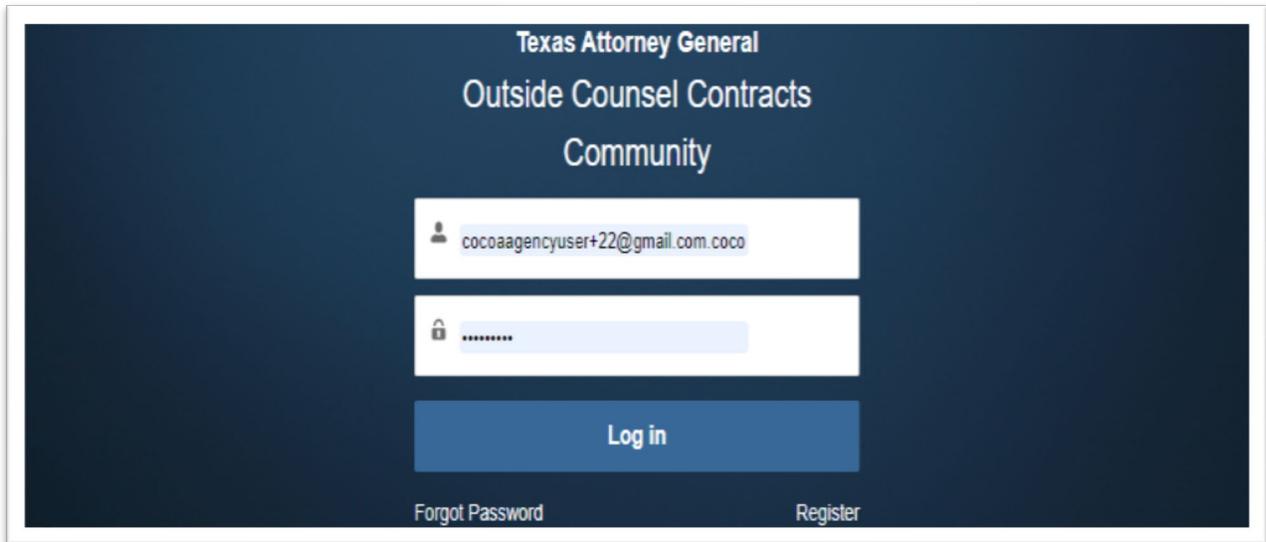


2. Enter the requested information and select "Request". You will receive a confirmation email that your request has been submitted to the OAG for evaluation and another notifying you that you may register with the new Agency once the OAG has approved your request.

## Logging into the Community

### Login as a Registered User

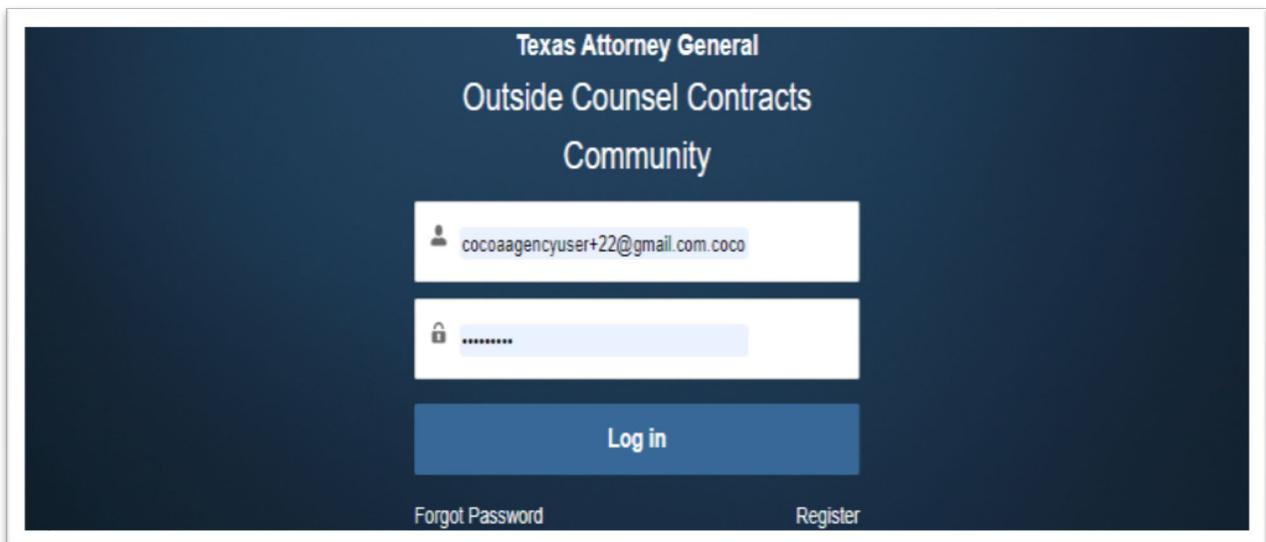
1. Enter your user ID and password and select “Log in” and you will be taken to your Community Home Page with a listing of agencies for which you have registered and been approved.



The screenshot shows the login page for the Texas Attorney General Outside Counsel Contracts Community. The page has a dark blue background with white text. At the top, it reads "Texas Attorney General", "Outside Counsel Contracts", and "Community". Below this, there are two input fields: the first contains the email address "cocoaagencyuser+22@gmail.com.coco" and the second contains a masked password "\*\*\*\*\*". A blue "Log in" button is positioned below the password field. At the bottom of the page, there are two links: "Forgot Password" on the left and "Register" on the right.

### Resetting your Password as a Registered User

1. Select “Forgot password?” at the bottom of the Login page.



This screenshot is identical to the one above, showing the login page for the Texas Attorney General Outside Counsel Contracts Community. It features the same header, input fields for email and password, a "Log in" button, and "Forgot Password" and "Register" links at the bottom.

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.

**PASSWORD RESET**

To reset your password, we'll need your username.  
We'll send password reset instructions to the email  
address associated with your account.

Username

**Reset Password**

[Cancel](#)

### Logging out of the Community

1. Select the Icon in the top right of any page.
2. Select Logout from the dropdown.

**KEN PAXTON**  
ATTORNEY GENERAL of TEXAS

[Home](#) [Contact Us](#)

**Outside Counsel Contracts**

**Your Agency Access**

| Agency Name  | Agency Number | Active                              | Agency Head                         | Admin Access                        | Contract Access                     | Voucher Access                      |
|--------------|---------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Mayberry RFD | 950           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Mount Pilot  | 951           | <input checked="" type="checkbox"/> |
| Pixley       | 952           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |

[Request Additional Access](#)

- Home
- My Profile
- My Settings
- Messages
- My Account
- Contact Support
- Logout

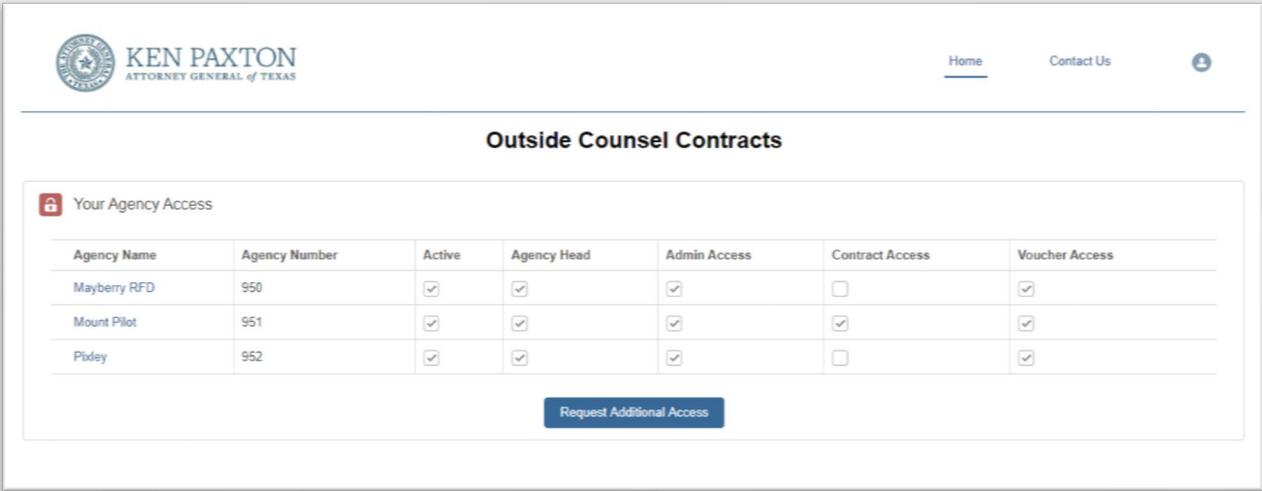
## Requests to Retain

### 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.

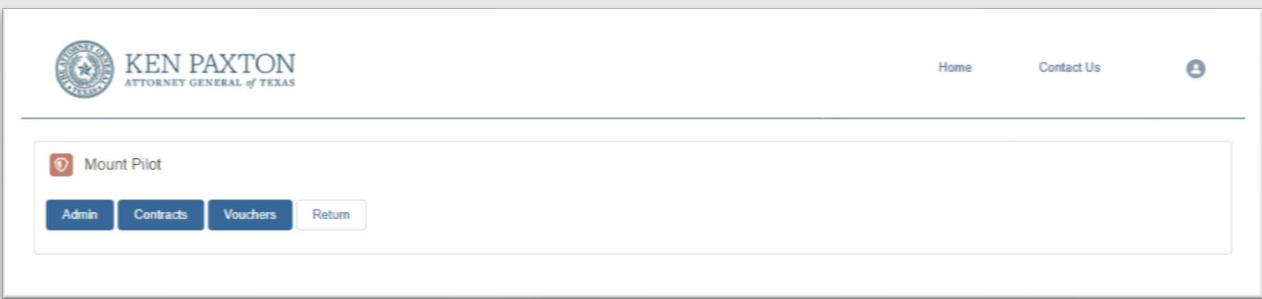


The screenshot shows the 'Outside Counsel Contracts' page. At the top left is the logo for Ken Paxton, Attorney General of Texas. To the right are links for 'Home' and 'Contact Us'. The main heading is 'Outside Counsel Contracts'. Below this is a section titled 'Your Agency Access' with a lock icon. It contains a table with the following data:

| Agency Name  | Agency Number | Active                              | Agency Head                         | Admin Access                        | Contract Access                     | Voucher Access                      |
|--------------|---------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Mayberry RFD | 950           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Mount Pilot  | 951           | <input checked="" type="checkbox"/> |
| Pixley       | 952           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |

Below the table is a blue button labeled 'Request Additional Access'.

#### 3. Select the “Contracts” button to manage Requests to Retain, Contracts and Amendments



The screenshot shows the 'Mount Pilot' agency page. At the top left is the logo for Ken Paxton, Attorney General of Texas. To the right are links for 'Home' and 'Contact Us'. The main heading is 'Mount Pilot'. Below this are four buttons: 'Admin', 'Contracts', 'Vouchers', and 'Return'. The 'Contracts' button is highlighted in blue.

4. Select the “Request to Retain” button from the Contract Management Section to display a list of existing RTRs for your agency.

Mount Pilot

Admin Contracts Vouchers Return

Contract Management

Requests To Retain Contracts Contract Amendments

Requests to Retain List New

Filter

| Actions              | Request Number | Request ID    | Requester Name | Law Firm            | Start Date  | End Date     | Status  | Created Date |
|----------------------|----------------|---------------|----------------|---------------------|-------------|--------------|---------|--------------|
| <a href="#">View</a> | 00000555       |               | Andy Taylor    |                     | Aug 1, 2020 | Aug 31, 2020 | Draft   | Aug 12, 2020 |
| <a href="#">View</a> | 00000487       | 2021-951-0004 | Andy Taylor    | Thomas J Henry Plus | Sep 1, 2020 | Aug 31, 2021 | Pending | Jun 23, 2020 |
| <a href="#">View</a> | 00000267       |               | Andy Taylor    |                     | Sep 1, 2019 | Aug 31, 2020 | Draft   | May 15, 2020 |

## 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).

The screenshot shows the 'New Request to Retain' form within the Ken Paxton Attorney General of Texas portal. The header includes the state seal and the text 'KEN PAXTON ATTORNEY GENERAL of TEXAS', along with 'Home' and 'Contact Us' links. The main content area has a 'Mount Pilot' button and a 'New Request to Retain' button with 'Cancel' and 'Save' options. A blue informational box contains instructions: 'Pursuant to Title 1, Chapter 57 of the Texas Administrative Code, please fill out this Request to Retain Outside Counsel to the best of your knowledge. Once filled out, click "Save" in order to add attachments. Once your request has been validated, click the "Submit" button to send your request to the OAG. Please see our Letter to State Agencies and Prospective Outside Counsel if you have any questions.' A legend indicates that an asterisk (\*) denotes a required field. The form fields include: '\* Start Date' (required, with a red border and error message 'Start Date is required'), '\* End Date', '\* Intellectual Property Exemption' (checkbox), and '\* Source of All Funds'.

### Creating a Draft of you 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.

The screenshot shows the Ken Paxton Attorney General of Texas website interface. At the top left is the logo and name 'KEN PAXTON ATTORNEY GENERAL of TEXAS'. To the right are links for 'Home' and 'Contact Us'. Below the header, there are two main sections: 'Mount Pilot' and 'New Request to Retain'. The 'New Request to Retain' section includes a 'Cancel' button and a 'Save' button. A blue informational box contains text about the request process and a note that an asterisk indicates a required field. Below this is a dark blue header for the 'Request' form. The form includes two date pickers: '\* Start Date' (set to Sep 1, 2020) and '\* End Date' (set to Aug 31, 2021). There is also a checkbox for 'Intellectual Property Exemption' and a text input field for 'Source of All Funds'.

**KEN PAXTON**  
ATTORNEY GENERAL of TEXAS

Home Contact Us

Mount Pilot

New Request to Retain Cancel Save

**i** Pursuant to Title 1, Chapter 57 of the Texas Administrative Code, please fill out this Request to Retain Outside Counsel to the best of your knowledge. Once filled out, click "Save" in order to add attachments. Once your request has been validated, click the "Submit" button to send your request to the OAG. Please see our Letter to State Agencies and Prospective Outside Counsel if you have any questions. **\* indicates a required field**

**Request**

\* Start Date **i**  **i**

\* End Date **i**  **i**

Intellectual Property Exemption **i**

Source of All Funds **i**

Save

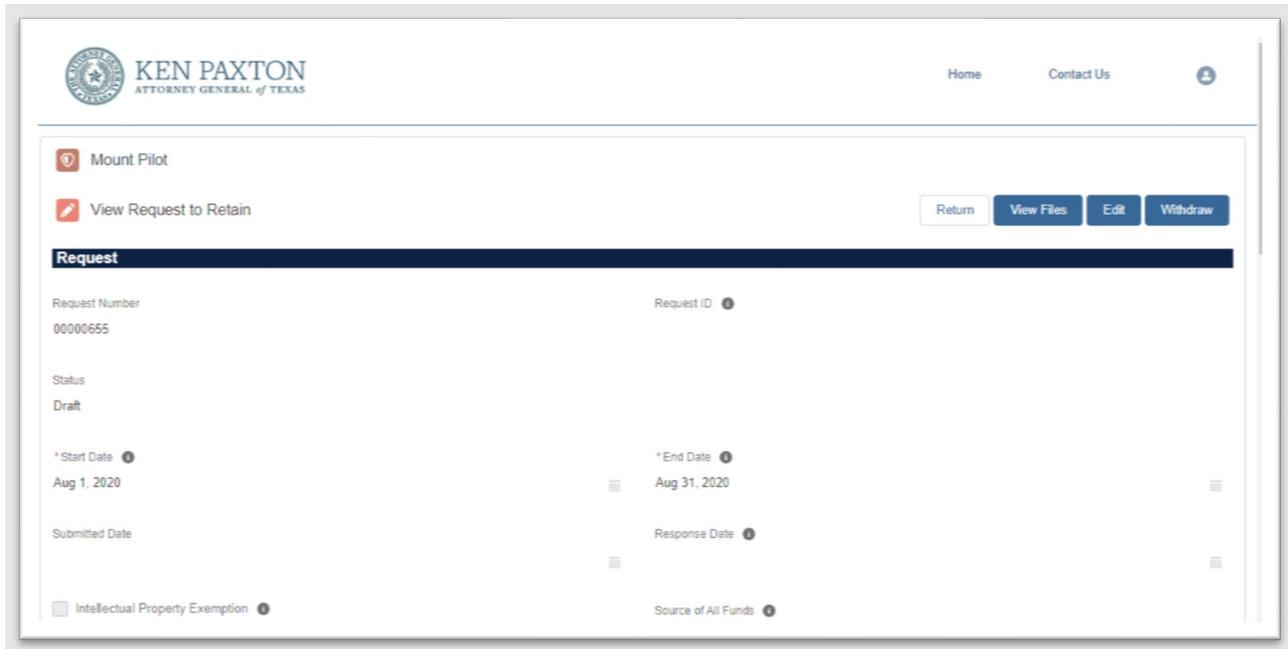
1. Select "Save" to save a draft of your RTR. Your RTR is saved as a draft and appears in "View" mode.

The screenshot shows the Mount Pilot web application interface. At the top left is the logo for Ken Paxton, Attorney General of Texas. Navigation links for 'Home' and 'Contact Us' are at the top right. The main content area is titled 'View Request to Retain' and includes buttons for 'Return', 'View Files', 'Edit', and 'Withdraw'. Below this is a 'Request' section with the following details:

|  |                     |
|--|---------------------|
| Request Number   | Request ID          |
| 00000407   |                     |
| Status   |                     |
| Draft  |                     |
| *Start Date  | *End Date           |
| Sep 1, 2020  | Aug 31, 2021        |
| Submitted Date   | Response Date       |
|  |                     |
| <input type="checkbox"/> Intellectual Property Exemption | Source of All Funds |

Below the request details is a 'Requesting Agency' section.

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.

The screenshot displays the Mount Pilot web application interface. At the top left is the Ken Paxton Attorney General of Texas logo. Navigation links for "Home" and "Contact Us" are in the top right. The main content area is titled "Mount Pilot" and includes tabs for "Contracts", "Vouchers", and "Return". Below this is a "Contract Management" section with tabs for "Requests To Retain", "Contracts", and "Contract Amendments". The "Requests to Retain List" section features a "New" button and a "Filter" input field. A table lists the following data:

| Actions              | Request Number | Request ID    | Requester Name    | Law Firm       | Start Date  | End Date     | Status    | Created Date |
|----------------------|----------------|---------------|-------------------|----------------|-------------|--------------|-----------|--------------|
| <a href="#">View</a> | 00000407       |               | Andy Taylor       |                | Sep 1, 2020 | Aug 31, 2021 | Draft     | Oct 13, 2020 |
| <a href="#">View</a> | 00000278       |               | Harold Beasley    |                | Sep 1, 2020 | Sep 30, 2020 | Withdrawn | Sep 18, 2020 |
| <a href="#">View</a> | 00000236       |               | Martha Washington |                | Jul 1, 2020 | Jul 31, 2020 | Denied    | Jul 27, 2020 |
| <a href="#">View</a> | 00000233       | 2020-400-0193 | test              | Thomas Holcomb | Jul 1, 2020 | Jul 31, 2020 | Approved  | Jul 27, 2020 |

### Editing a Draft RTR

1. Select "View" on the row of the draft RTR you want to continue editing.

The screenshot displays the Mount Pilot web application interface. At the top left is the Ken Paxton Attorney General of Texas logo. Navigation links for 'Home' and 'Contact Us' are in the top right. The main content area is titled 'Mount Pilot' and includes tabs for 'Contracts', 'Vouchers', and 'Return'. Below this is a 'Contract Management' section with tabs for 'Requests To Retain', 'Contracts', and 'Contract Amendments'. The 'Requests to Retain List' section features a 'Filter' input field and a 'New' button. A table lists four requests with columns for Actions, Request Number, Request ID, Requester Name, Law Firm, Start Date, End Date, Status, and Created Date.

| Actions              | Request Number | Request ID    | Requester Name    | Law Firm       | Start Date  | End Date     | Status    | Created Date |
|----------------------|----------------|---------------|-------------------|----------------|-------------|--------------|-----------|--------------|
| <a href="#">View</a> | 00000407       |               | Andy Taylor       |                | Sep 1, 2020 | Aug 31, 2021 | Draft     | Oct 13, 2020 |
| <a href="#">View</a> | 00000278       |               | Harold Beasley    |                | Sep 1, 2020 | Sep 30, 2020 | Withdrawn | Sep 18, 2020 |
| <a href="#">View</a> | 00000236       |               | Martha Washington |                | Jul 1, 2020 | Jul 31, 2020 | Denied    | Jul 27, 2020 |
| <a href="#">View</a> | 00000233       | 2020-400-0193 | test              | Thomas Holcomb | Jul 1, 2020 | Jul 31, 2020 | Approved  | Jul 27, 2020 |

## 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.

**Validation**

Valid Request

Items Required

- Designated Attorney Name is required.
- Designated Attorney Phone is required.
- Designated Attorney Email is required.
- Authorized Agency Signatory Title is required.
- Authorized Agency Signatory Name is required.
- Authorized Agency Signatory Email is required.
- Law Firm is required.
- Law Firm Address is required.
- Notices Address is required.
- Law Firm Tax ID is required.
- Lead Attorney Name is required.
- Authorized Law Firm Signatory Title is required.
- Authorized Law Firm Signatory Name is required.
- Authorized Law Firm Signatory Email is required.
- Anticipated Legal Costs are required.
- Agency Pays Travel Time is required.
- Fee Schedule Rates Option is required.
- Billing Type is required.
- Discussed with OAG is required.
- RFQ Posted is required.
- Not Entering Text Scope of Services. Addendum A - Scope of Services Attachment is required.
- Affirmation Statement file is required.
- Conflicts Disclosure file is required.
- Eligibility to Practice Law file is required.

Updates Required

Return Top of Form Edit

Files Add File

## Working with Files

The following files must be attached to pass validation and allow for submission:

- Affirmation Statement
- Conflicts Disclosure
- Eligibility to Practice Law

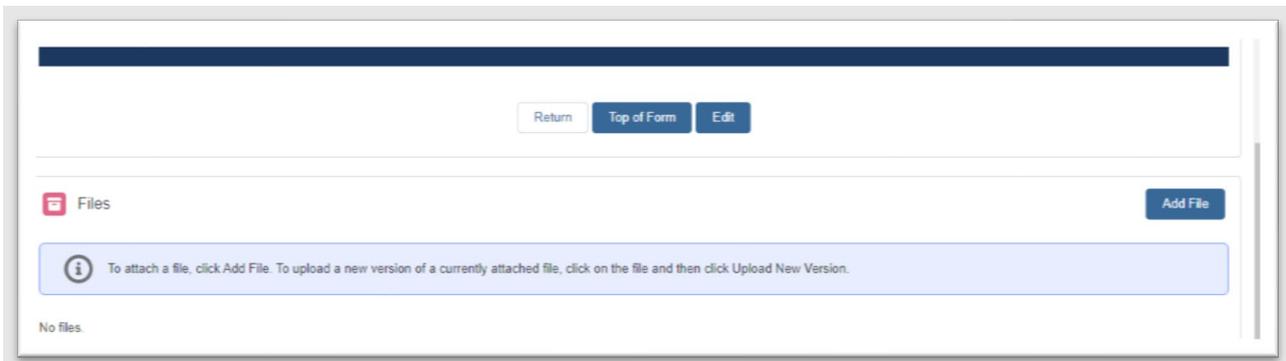
Other files may be required depending on your selections while filling out the RTR. They will be identified as required when you attempt to save the RTR.

### Attaching Files

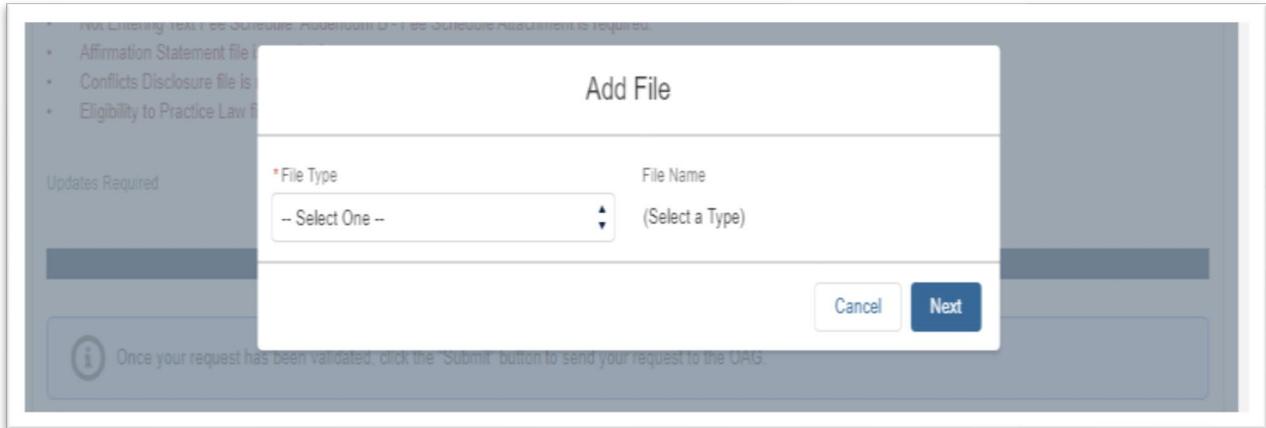
1. Select “View Files” while viewing the draft to go to the files section. (View Files is not available while in edit mode).



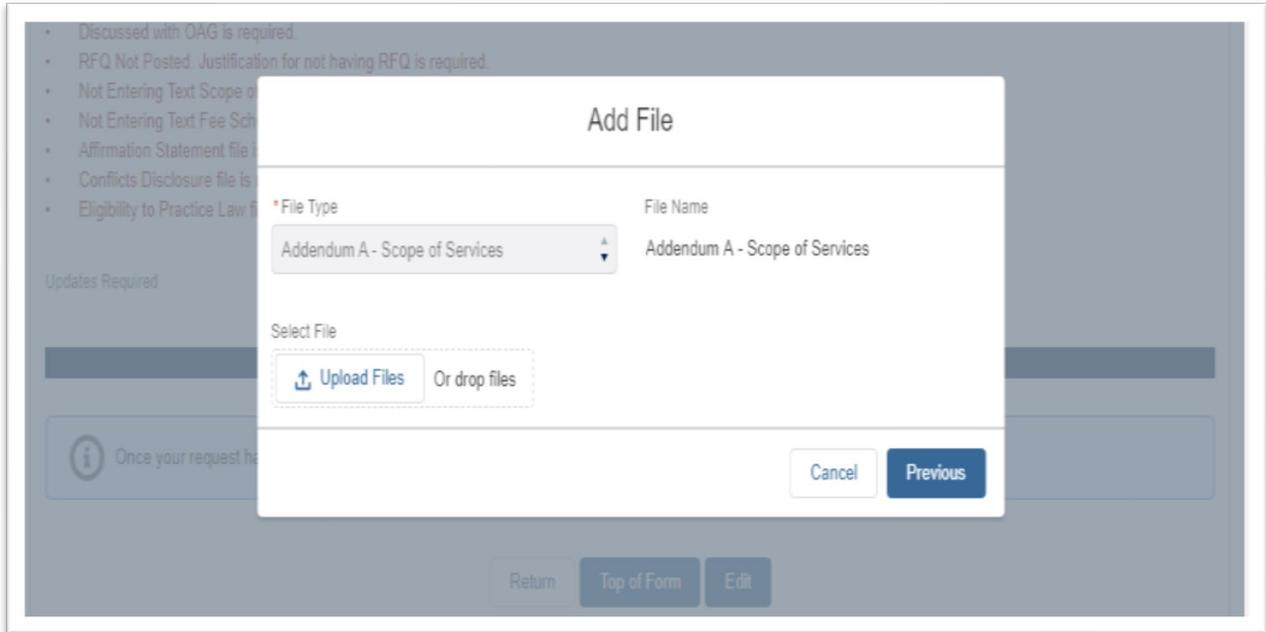
2. Select “Add File” to go to the Add File dialogue.



3. Select file type from the File Type dropdown and select “Next”.



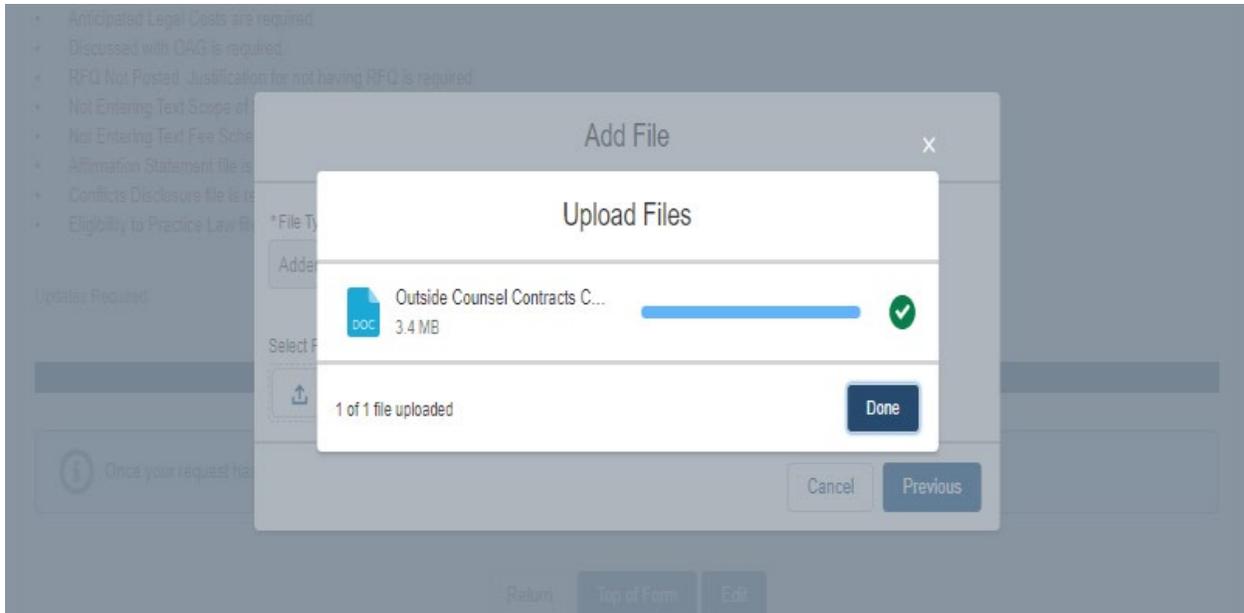
4. Select “Upload File”, choose the file you want to upload, and select “Open”.



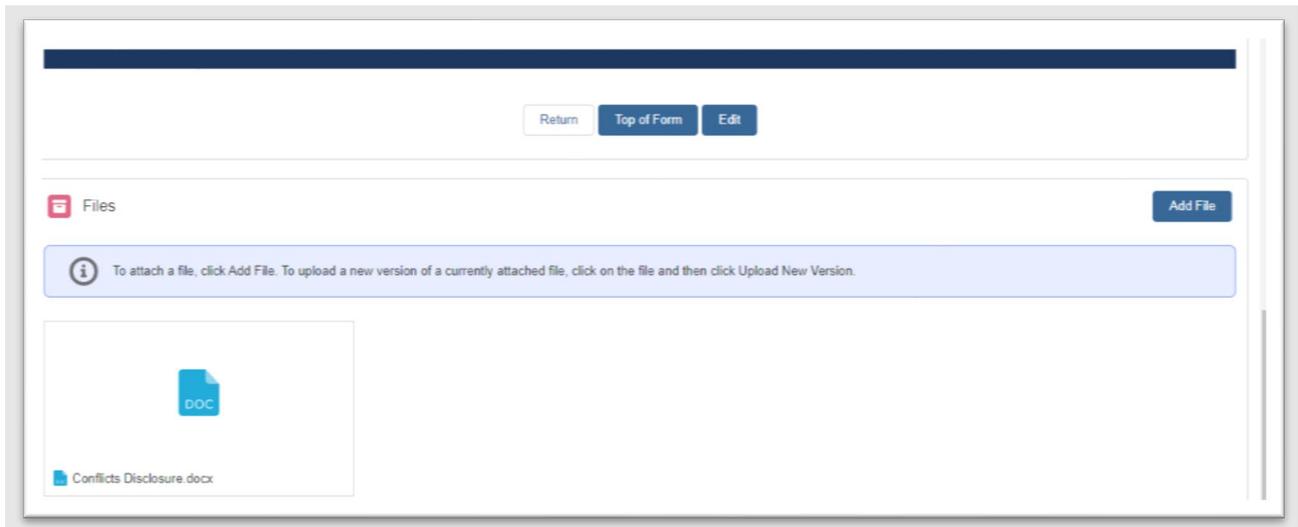
Alternatively, you can drag and drop your files to the File upload area

Note: The file upload will begin immediately

This screen will display showing the progress of your file upload.



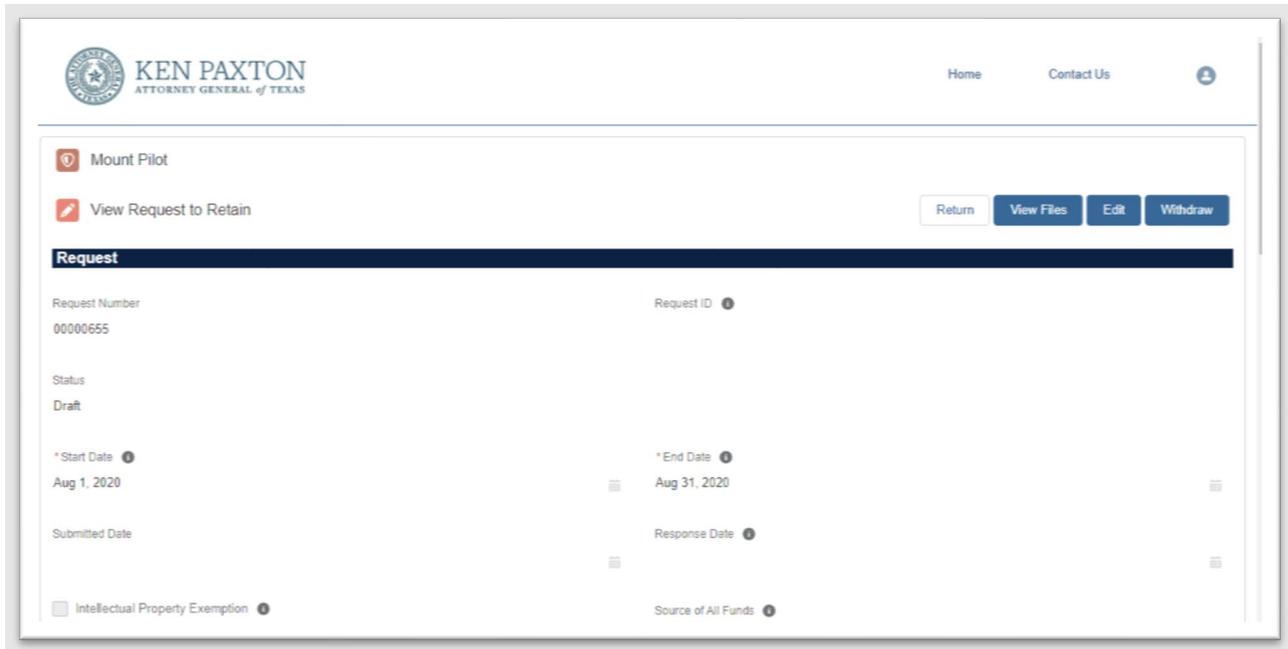
Once the file has been uploaded it will be displayed in the Files section.



### Withdrawing the RTR

The RTR can be withdrawn prior to submission to the OAG.

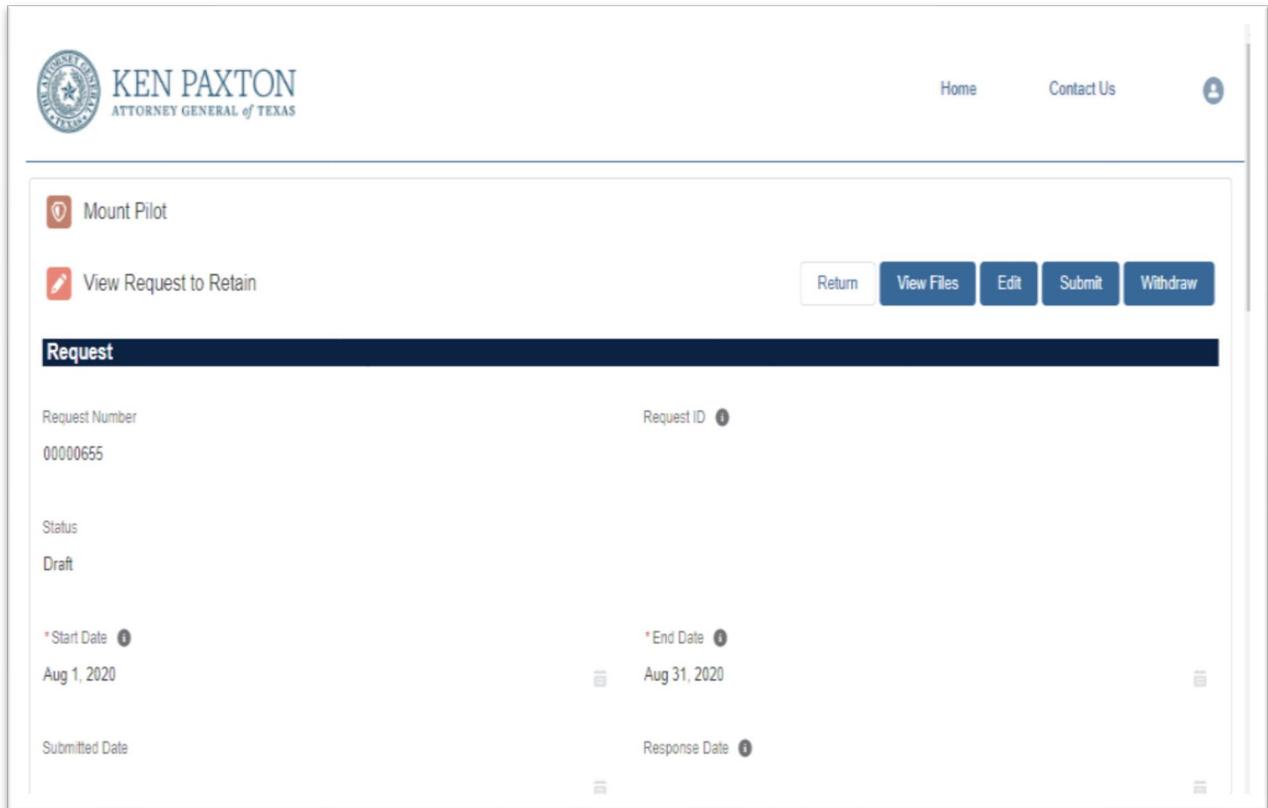
1. Select “Withdraw” while viewing the draft. (Withdraw will not display in Edit mode)



### 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.

**Mount Pilot**

Admin Contracts Vouchers Return

Contract Management

Requests To Retain Contracts Contract Amendments

Requests to Retain List [New](#)

Filter

| Actions              | Request Number | Request ID    | Requester Name | Law Firm            | Start Date  | End Date     | Status    | Created Date |
|----------------------|----------------|---------------|----------------|---------------------|-------------|--------------|-----------|--------------|
| <a href="#">View</a> | 00000655       |               | Andy Taylor    | Thomas J Henry      | Aug 1, 2020 | Aug 31, 2020 | Submitted | Aug 12, 2020 |
| <a href="#">View</a> | 00000487       | 2021-951-0004 | Andy Taylor    | Thomas J Henry Plus | Sep 1, 2020 | Aug 31, 2021 | Pending   | Jun 23, 2020 |
| <a href="#">View</a> | 00000267       |               | Andy Taylor    |                     | Sep 1, 2019 | Aug 31, 2020 | Draft     | May 15, 2020 |
| <a href="#">View</a> | 00000244       | 2019-951-0050 | Andy Taylor    |                     | Sep 1, 2019 | Aug 31, 2020 | Withdrawn | May 1, 2020  |
| <a href="#">View</a> | 00000243       | 2020-951-0149 | Andy Taylor    |                     | Sep 1, 2019 | Aug 31, 2020 | Withdrawn | May 1, 2020  |

## 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 be viewable.

| Actions              | Request Number | Request ID    | Requester Name | Law Firm            | Start Date  | End Date     | Status  | Created Date |
|----------------------|----------------|---------------|----------------|---------------------|-------------|--------------|---------|--------------|
| <a href="#">View</a> | 00000555       |               | Andy Taylor    |                     | Aug 1, 2020 | Aug 31, 2020 | Draft   | Aug 12, 2020 |
| <a href="#">View</a> | 00000487       | 2021-951-0004 | Andy Taylor    | Thomas J Henry Plus | Sep 1, 2020 | Aug 31, 2021 | Pending | Jun 23, 2020 |
| <a href="#">View</a> | 00000267       |               | Andy Taylor    |                     | Sep 1, 2019 | Aug 31, 2020 | Draft   | May 15, 2020 |

## Managing Contracts

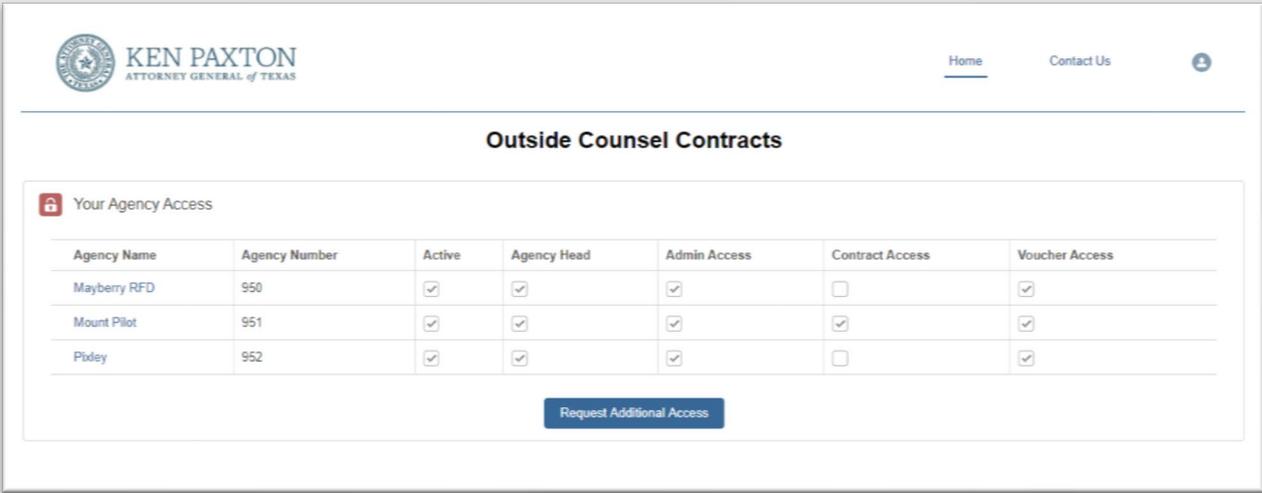
### Viewing Contracts

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.

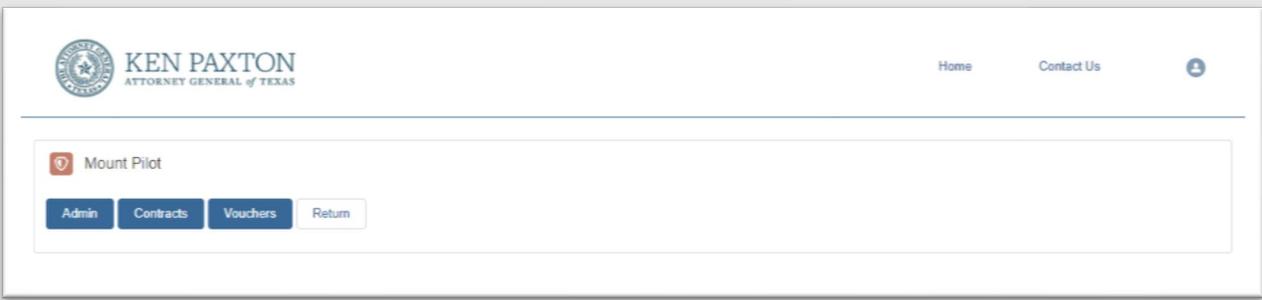


The screenshot shows the 'Outside Counsel Contracts' page. At the top left is the logo for Ken Paxton, Attorney General of Texas. To the right are links for 'Home' and 'Contact Us'. The main heading is 'Outside Counsel Contracts'. Below this is a section titled 'Your Agency Access' with a lock icon. It contains a table with the following data:

| Agency Name  | Agency Number | Active                              | Agency Head                         | Admin Access                        | Contract Access                     | Voucher Access                      |
|--------------|---------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Mayberry RFD | 950           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Mount Pilot  | 951           | <input checked="" type="checkbox"/> |
| Pixley       | 952           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |

Below the table is a blue button labeled 'Request Additional Access'.

#### 3. Select the "Contracts" button to manage Requests to Retain, Contracts and Amendments

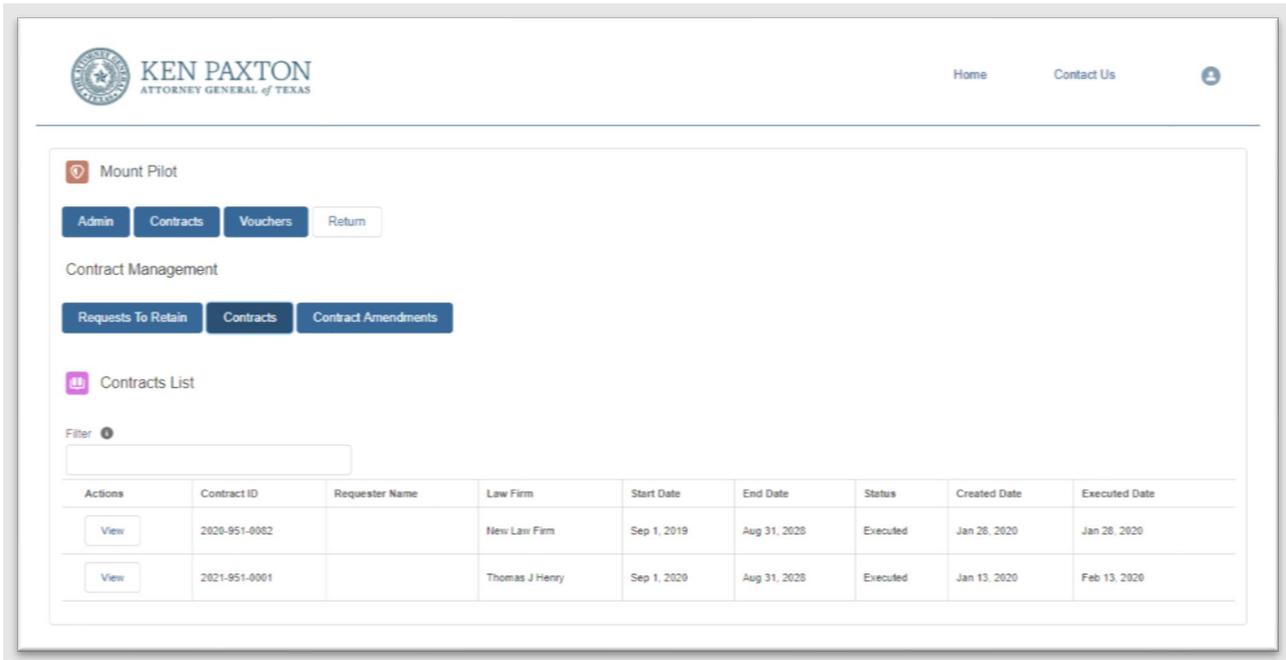


The screenshot shows the 'Mount Pilot' agency page. At the top left is the logo for Ken Paxton, Attorney General of Texas. To the right are links for 'Home' and 'Contact Us'. The main heading is 'Mount Pilot'. Below this are four buttons: 'Admin', 'Contracts', 'Vouchers', and 'Return'.

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.

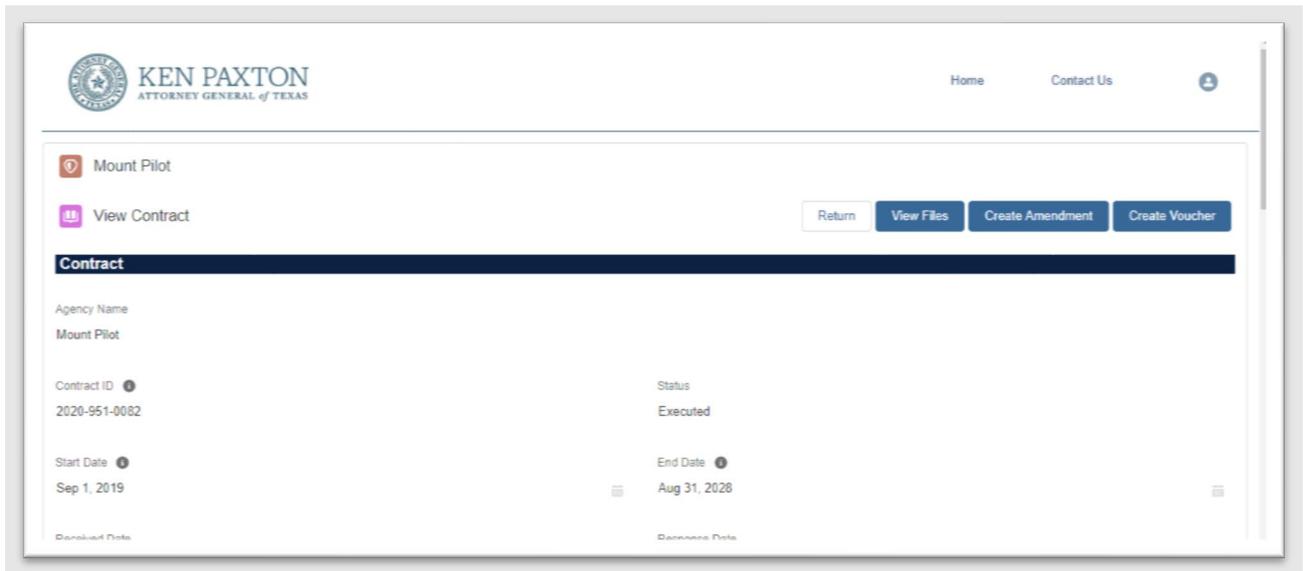


You can view the most recent contract detail as per the last executed amendment. Additionally, you can initiate the following tasks:

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 be 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.



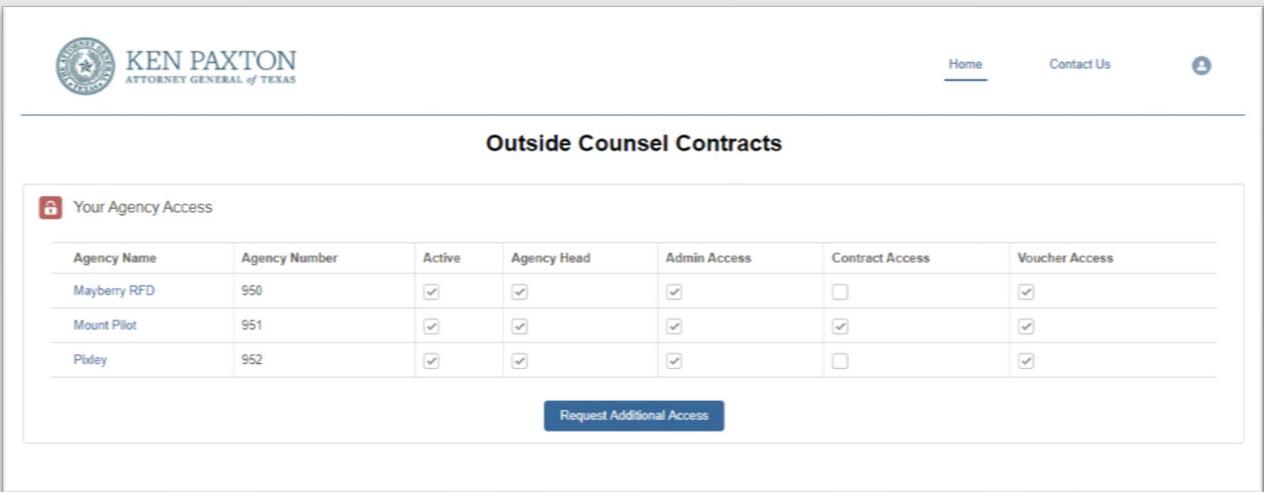
## Contract Amendment

### 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.

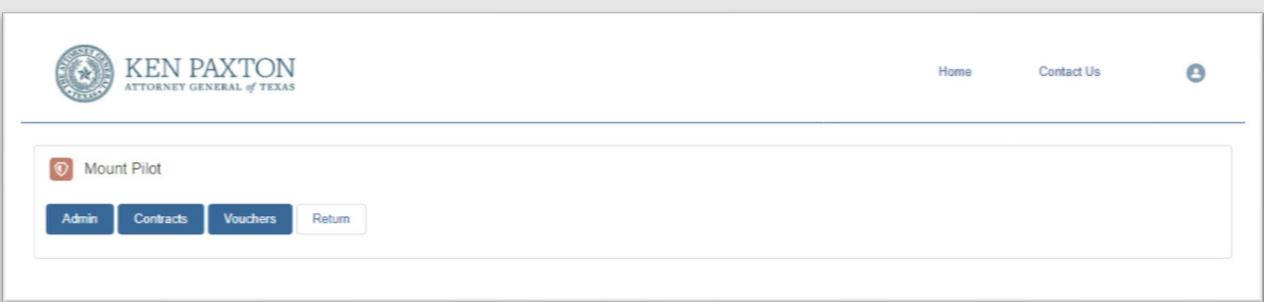
#### 2. Select the link for the agency you need to work with from the Agency Name column.



The screenshot shows the 'Your Agency Access' section of the 'Outside Counsel Contracts' page. It features a table with columns for Agency Name, Agency Number, Active, Agency Head, Admin Access, Contract Access, and Voucher Access. Below the table is a 'Request Additional Access' button.

| Agency Name  | Agency Number | Active                              | Agency Head                         | Admin Access                        | Contract Access                     | Voucher Access                      |
|--------------|---------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Mayberry RFD | 950           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Mount Pilot  | 951           | <input checked="" type="checkbox"/> |
| Pixley       | 952           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |

#### 3. Select "Contracts"



The screenshot shows the 'Mount Pilot' agency access page. It features a navigation bar with buttons for 'Admin', 'Contracts', 'Vouchers', and 'Return'.

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

The screenshot displays the Mount Pilot web application interface. At the top left is the logo for Ken Paxton, Attorney General of Texas. Navigation links for 'Home' and 'Contact Us' are in the top right. The main content area is titled 'Mount Pilot' and contains a navigation menu with 'Admin', 'Contracts', 'Vouchers', and 'Return'. Below this is the 'Contract Management' section with buttons for 'Requests To Retain', 'Contracts', and 'Contract Amendments'. The 'Contract Amendments List' section features a 'New' button and a 'Filter' input field. A table below lists two contract amendments.

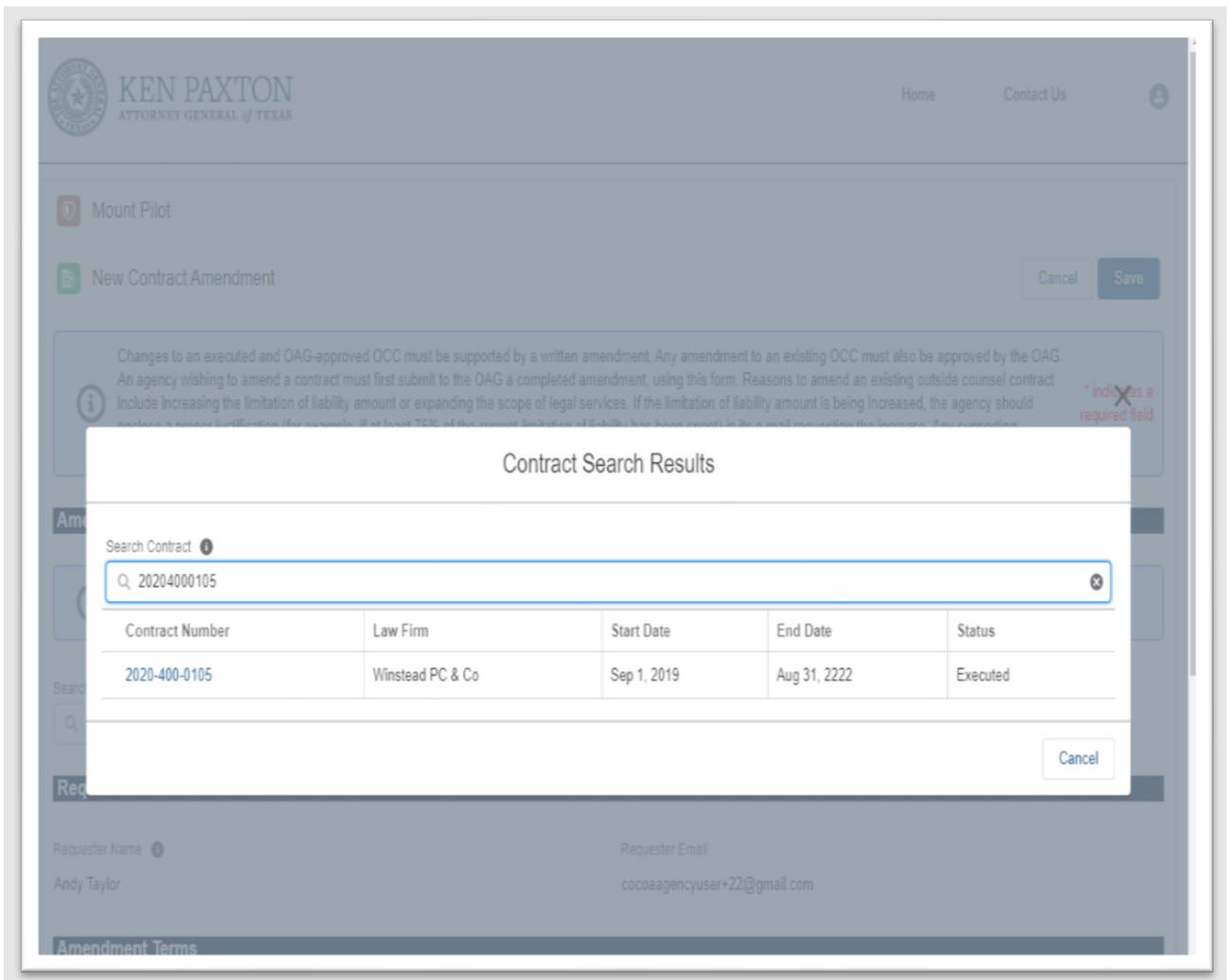
| Actions              | Amendment ID | Contract ID   | Requester Name | Status   | Created Date | Executed Date |
|----------------------|--------------|---------------|----------------|----------|--------------|---------------|
| <a href="#">View</a> | 00000092     | 2021-951-0001 |                | Executed | Feb 13, 2020 | Mar 30, 2020  |
| <a href="#">View</a> | 00000091     | 2020-951-0082 |                | Executed | Feb 13, 2020 | Feb 27, 2020  |



### Creating a Draft of your Request for Amendment

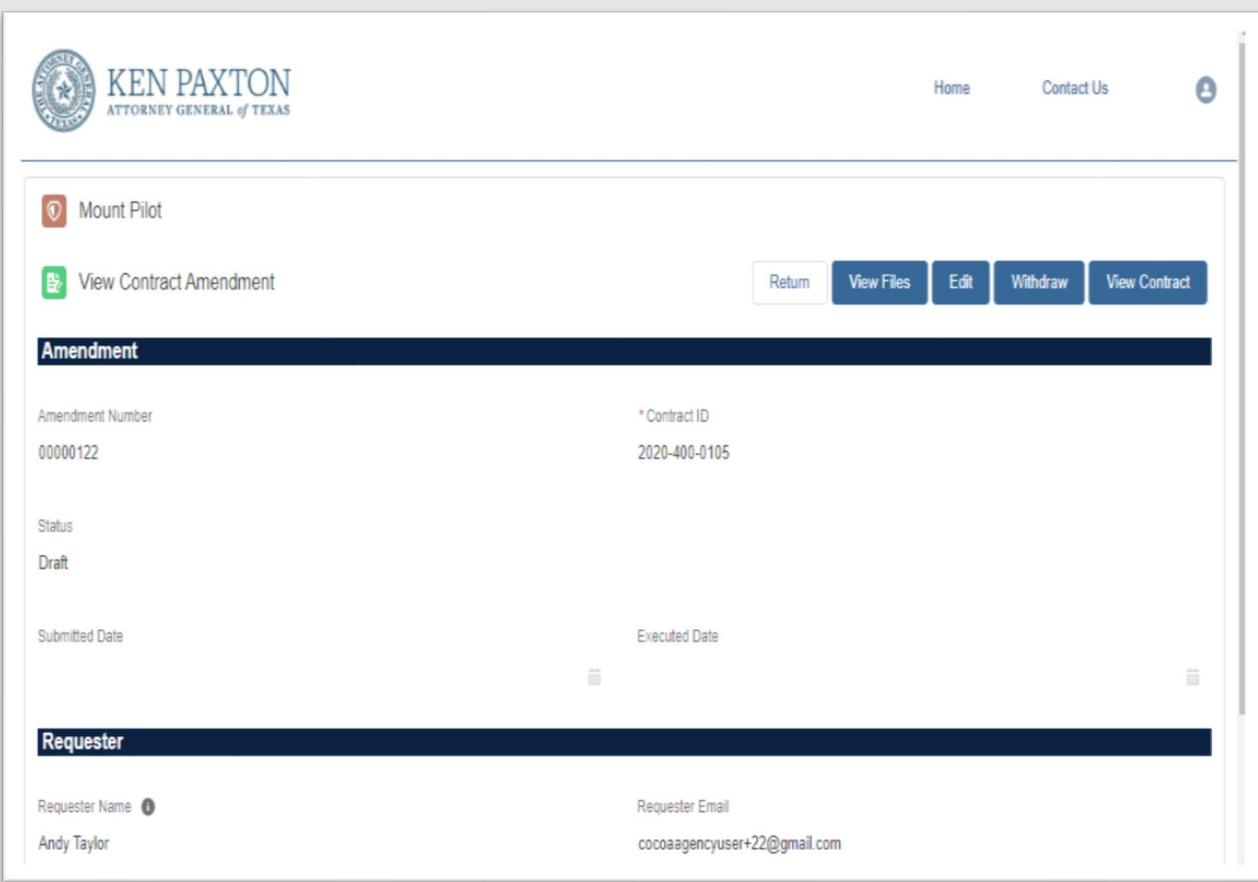
Creating a draft of the Request for Amendment allows you to save your work and complete the Request for Amendment later. To save a draft of your Request for Amendment you must enter a valid Contract ID.

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.



**KEN PAXTON**  
ATTORNEY GENERAL of TEXAS

Home Contact Us

Mount Pilot

View Contract Amendment

Return View Files Edit Withdraw View Contract

**Amendment**

|                  |               |
|------------------|---------------|
| Amendment Number | * Contract ID |
| 00000122         | 2020-400-0105 |
| Status           |               |
| Draft            |               |
| Submitted Date   | Executed Date |

**Requester**

|                  |                              |
|------------------|------------------------------|
| Requester Name ⓘ | Requester Email              |
| Andy Taylor      | cocoaagencyuser+22@gmail.com |

Edit

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

**KEN PAXTON**  
ATTORNEY GENERAL of TEXAS

Home Contact Us

Mount Pilot

View Contract Amendment

Return View Files Edit Withdraw View Contract

**Amendment**

|                  |               |
|------------------|---------------|
| Amendment Number | * Contract ID |
| 00000199         | 2020-951-0082 |
| Status           |               |
| Draft            |               |
| Submitted Date   | Executed Date |

**Requester**

|                |                              |
|----------------|------------------------------|
| Requester Name | Requester Email              |
| Andy Taylor    | cocoaagencyuser+15@gmail.com |

**Amendment Terms**

Specify Section/Addendum to be Amended

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.

The screenshot displays the Ken Paxton Attorney General of Texas website. The header includes the Ken Paxton logo and the text "KEN PAXTON ATTORNEY GENERAL of TEXAS". Navigation links for "Home" and "Contact Us" are visible in the top right corner. The main content area is titled "Mount Pilot" and contains three tabs: "Contracts", "Vouchers", and "Return". Below these tabs is a "Contract Management" section with three buttons: "Requests To Retain", "Contracts", and "Contract Amendments". The "Contract Amendments List" section features a "Filter" dropdown menu and a "New" button. A table below the filter displays the following data:

| Actions              | Amendment Number | Contract ID   | Requester Name    | Status    | Created Date | Executed Date |
|----------------------|------------------|---------------|-------------------|-----------|--------------|---------------|
| <a href="#">View</a> | 0000122          | 2020-400-0105 | Andy Taylor       | Draft     | Oct 13, 2020 |               |
| <a href="#">View</a> | 0000053          | 2020-400-0105 | Martha Washington | Submitted | Jul 30, 2020 |               |

## 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.

The screenshot shows a web form with the following elements:

- Two unchecked checkboxes: "Change in Agency Signatory" and "Change in Law Firm Signatory".
- A dark blue horizontal bar with the word "Validation" in white text.
- One unchecked checkbox: "Valid Amendment".
- A section titled "Items Required" containing a bulleted list:
  - Specify Section/Addendum to be Amended is required.
  - Brief Summary of Requested Changes is required.
  - Contract is Amended as Follows is required.
- A section titled "Updates Required" with a dark blue horizontal bar below it.
- At the bottom, three buttons: "Return" (white with grey border), "Top of Form" (dark blue), and "Edit" (dark blue).

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.

**KEN PAXTON**  
ATTORNEY GENERAL of TEXAS

Home Contact Us

Mount Pilot

View Contract Amendment

Return View Files Edit Submit Withdraw View Contract

**Amendment**

|                  |               |
|------------------|---------------|
| Amendment Number | * Contract ID |
| 00000122         | 2020-400-0105 |
| Status           |               |
| Draft            |               |
| Submitted Date   | Executed Date |
|                  |               |

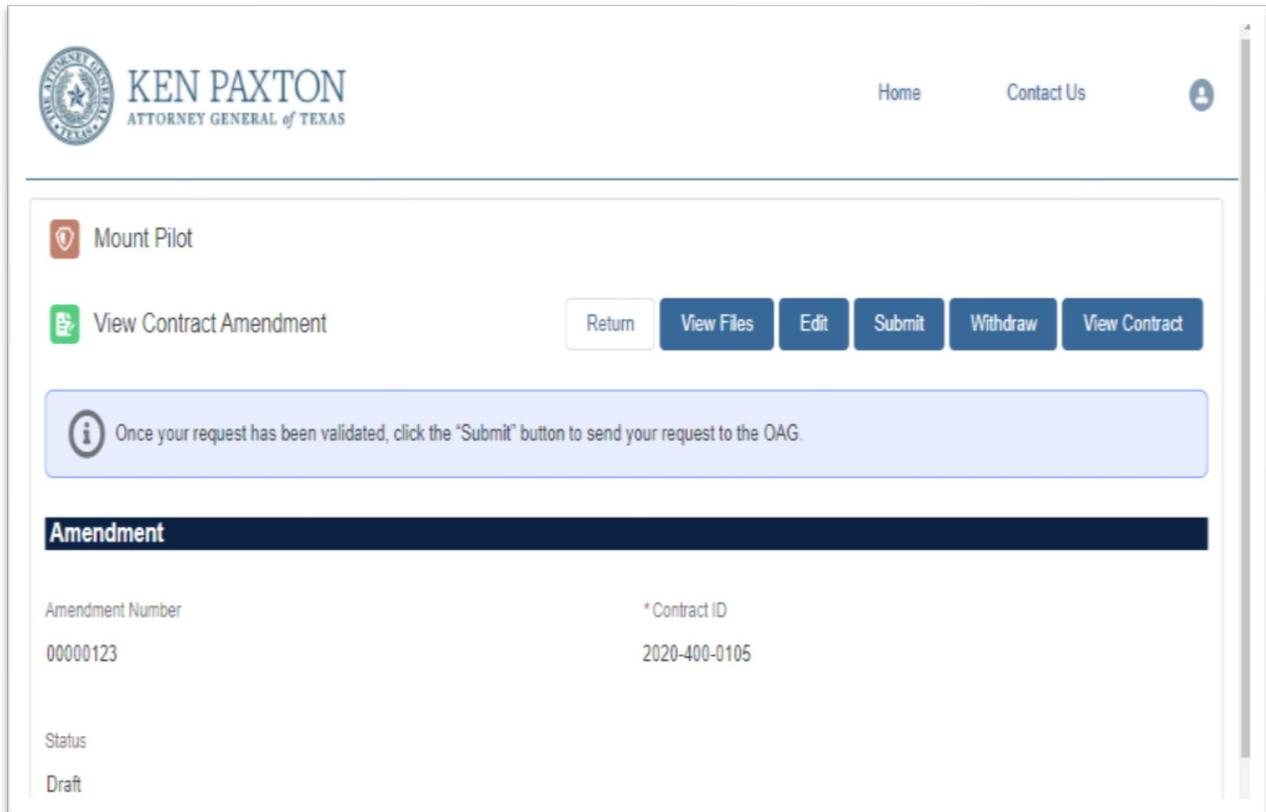
**Requester**

|                |                 |
|----------------|-----------------|
| Requester Name | Requester Email |
|                |                 |

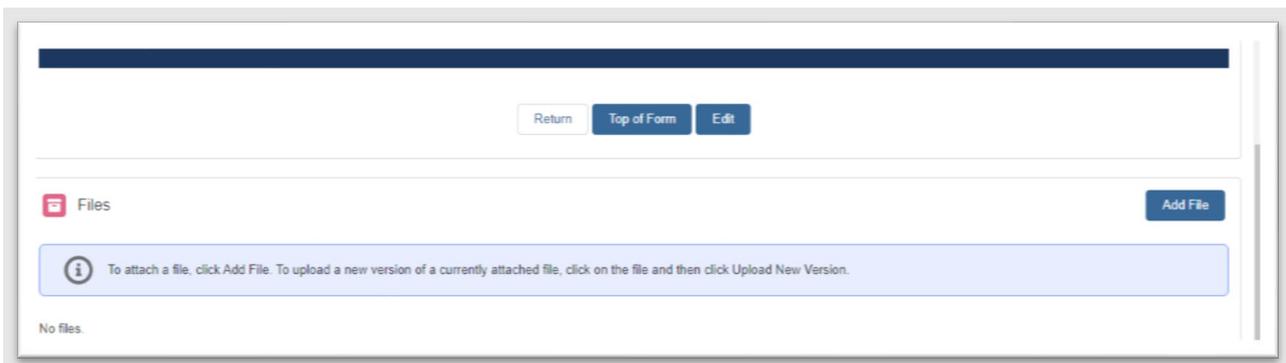
## Working with Files

### Attaching Files

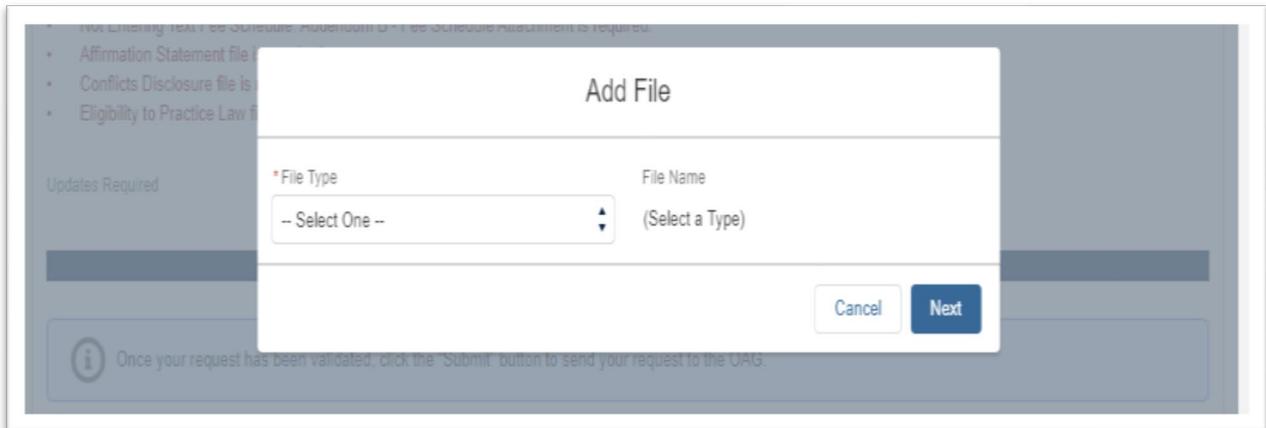
1. Select “View Files” while viewing the draft to go to the files section. (View Files is not available while in edit mode).



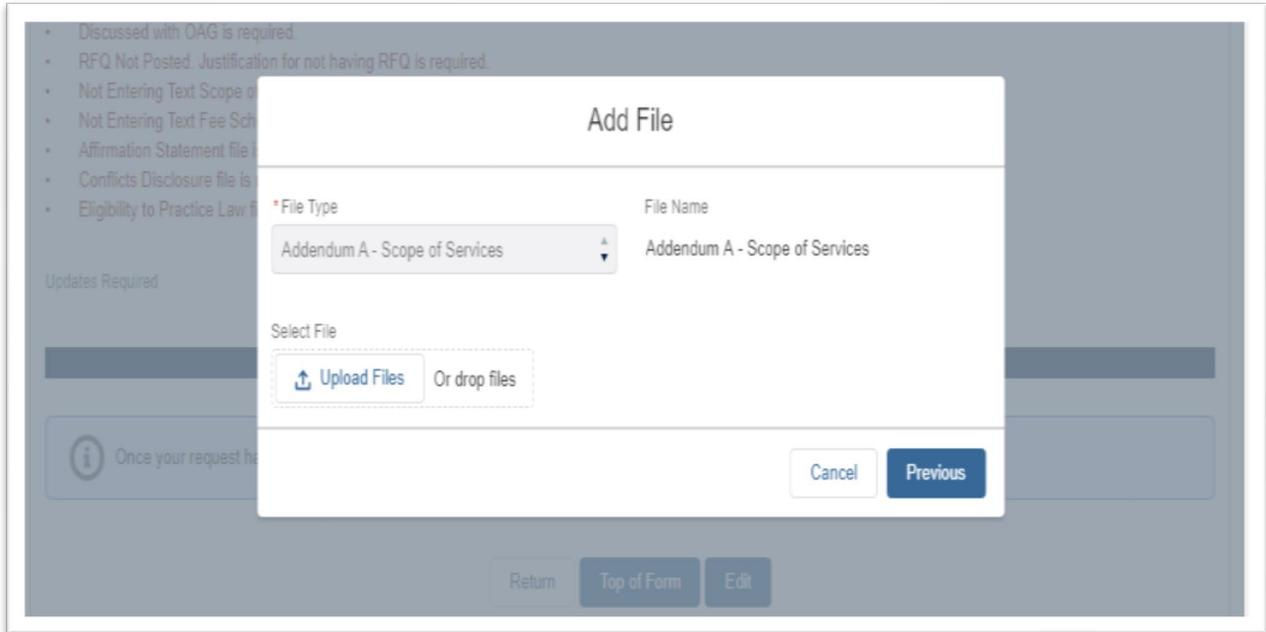
2. Select “Add File” to go to the Add File dialogue.



3. Select file type from the File Type dropdown and select “Next”.



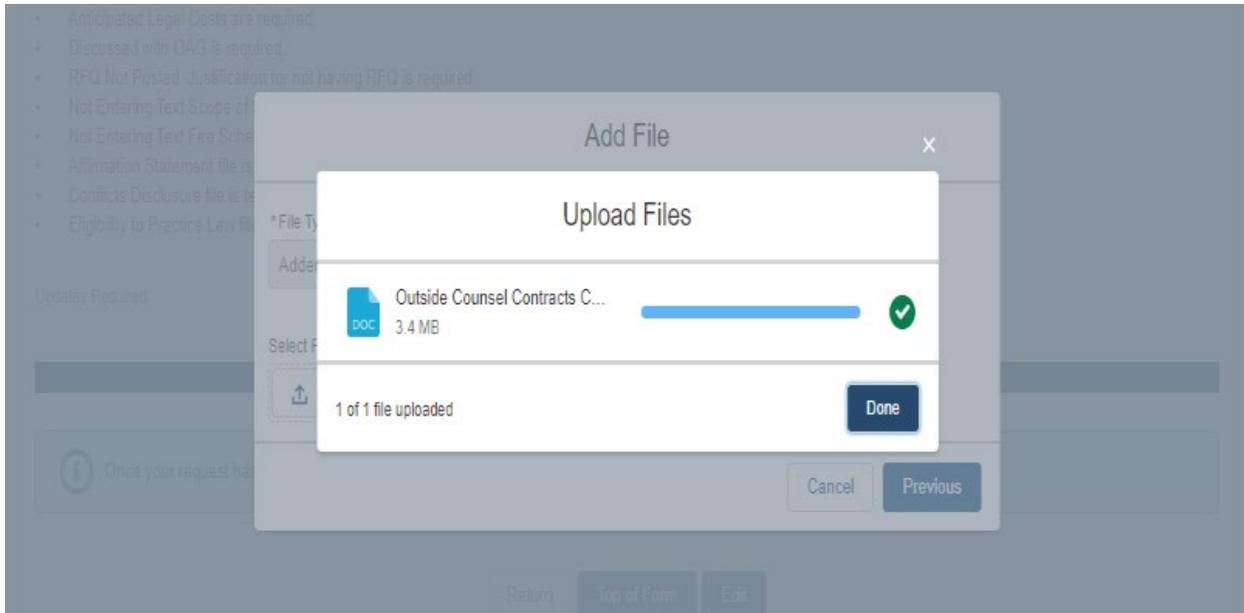
4. Select “Upload File”, choose the file you want to upload, and select “Open”.



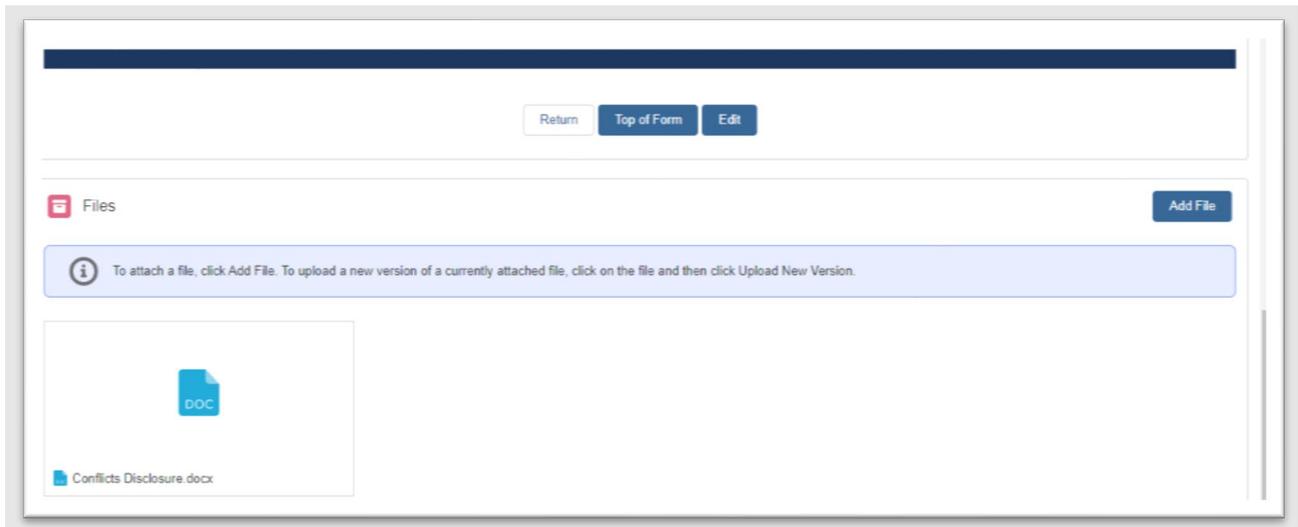
Alternatively, you can drag and drop your files to the File upload area

Note: The file upload will begin immediately

This screen will display showing the progress of your file upload.



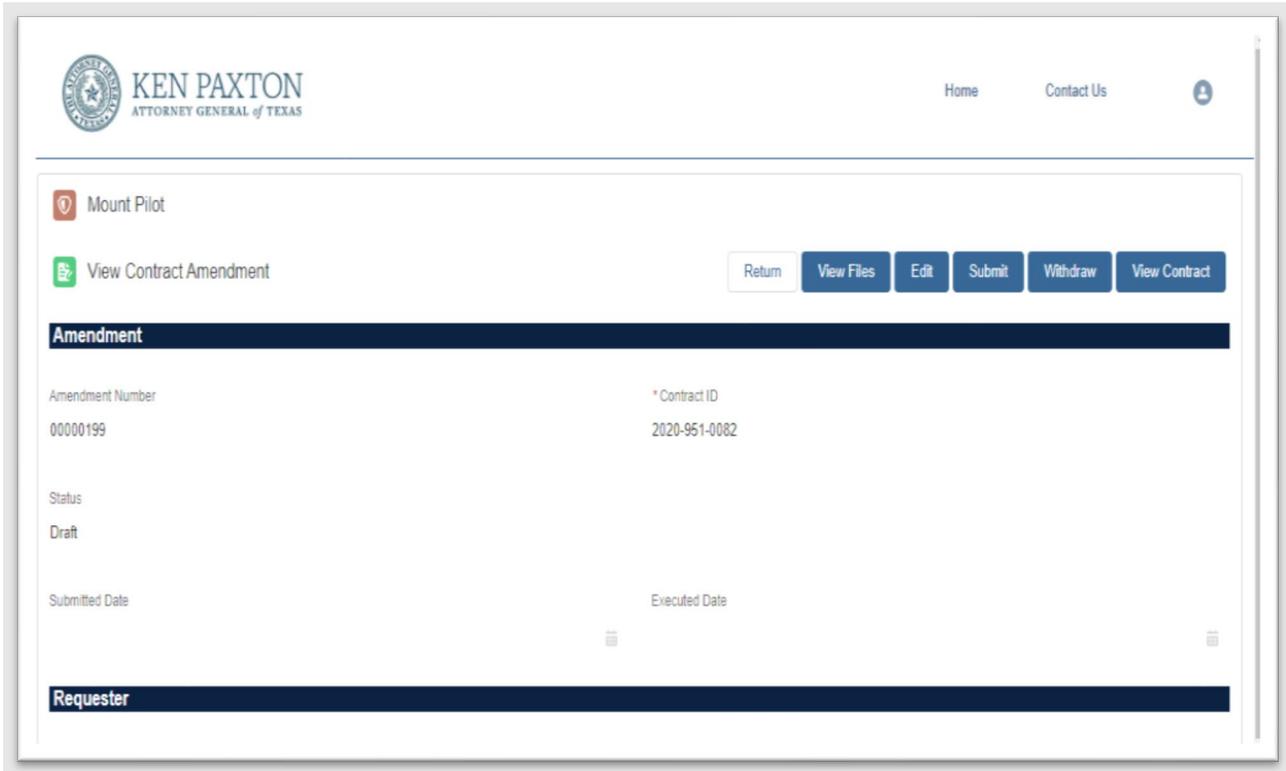
Once the file has been uploaded it will be displayed in the Files section.



## 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.

The screenshot displays the Ken Paxton Attorney General of Texas website. The header includes the state seal and the text "KEN PAXTON ATTORNEY GENERAL of TEXAS". Navigation links for "Home" and "Contact Us" are visible. The main content area is titled "Mount Pilot" and contains several tabs: "Contracts", "Vouchers", and "Return". Below these are sections for "Contract Management" with tabs for "Requests To Retain", "Contracts", and "Contract Amendments". The "Contract Amendments List" section features a "New" button and a "Filter" input field. A table below lists contract amendments with columns for Actions, Amendment Number, Contract ID, Requester Name, Status, Created Date, and Executed Date.

| Actions              | Amendment Number | Contract ID   | Requester Name    | Status    | Created Date | Executed Date |
|----------------------|------------------|---------------|-------------------|-----------|--------------|---------------|
| <a href="#">View</a> | 00000122         | 2020-400-0105 | Andy Taylor       | Submitted | Oct 13, 2020 |               |
| <a href="#">View</a> | 00000053         | 2020-400-0105 | Martha Washington | Submitted | Jul 30, 2020 |               |

## 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)

The screenshot displays the Ken Paxton Attorney General of Texas portal. At the top left is the logo and name "KEN PAXTON ATTORNEY GENERAL of TEXAS". To the right are links for "Home" and "Contact Us", and a user profile icon. Below the header, there is a "Mount Pilot" button and a "View Contract Amendment" button. A navigation bar contains buttons for "Return", "View Files", "Edit", "Withdraw", and "View Contract". The main content area is divided into two sections: "Amendment" and "Requester".

| Amendment        |               |
|------------------|---------------|
| Amendment Number | * Contract ID |
| 00000199         | 2020-951-0082 |
| Status           |               |
| Draft            |               |
| Submitted Date   | Executed Date |
|                  |               |

| Requester        |                              |
|------------------|------------------------------|
| Requester Name ⓘ | Requester Email              |
| Andy Taylor      | cocoaagencyuser+15@gmail.com |

2. Enter the reason for withdrawing the request and select “Save”

The screenshot displays a web interface for withdrawing a contract amendment. A modal window titled "Withdraw Contract Amendment" is centered on the screen. Inside the modal, there is a text input field labeled "\*Reason Withdrawn" with a blue border and a cursor. Below the input field are two buttons: "Cancel" and "Save". The background shows a partially visible form with fields for "Draft", "Submitted Date", "Requester" (with a value of "Andy Taylor"), and "Amendment Terms". A small email address "cocoagencyuser+22@gmail.com" is visible at the bottom of the modal.

## 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 be viewable.

The screenshot shows the Ken Paxton Attorney General of Texas website. The header includes the state seal, the name 'KEN PAXTON ATTORNEY GENERAL of TEXAS', and navigation links for 'Home' and 'Contact Us'. The main content area is titled 'Mount Pilot' and contains several navigation buttons: 'Contracts', 'Vouchers', and 'Return'. Below this is a 'Contract Management' section with buttons for 'Requests To Retain', 'Contracts', and 'Contract Amendments'. The primary section is 'Contract Amendments List', which includes a 'New' button and a 'Filter' input field. A table displays a list of contract amendments with columns for Actions, Amendment Number, Contract ID, Requester Name, Status, Created Date, and Executed Date.

| Actions              | Amendment Number | Contract ID   | Requester Name    | Status    | Created Date | Executed Date |
|----------------------|------------------|---------------|-------------------|-----------|--------------|---------------|
| <a href="#">View</a> | 00000123         | 2020-400-0105 | Andy Taylor       | Draft     | Oct 13, 2020 |               |
| <a href="#">View</a> | 00000122         | 2020-400-0105 | Andy Taylor       | Withdrawn | Oct 13, 2020 |               |
| <a href="#">View</a> | 00000053         | 2020-400-0105 | Martha Washington | Submitted | Jul 30, 2020 |               |
| <a href="#">View</a> | 00000051         | 2020-400-0109 | Martha Washington | Executed  | Jul 24, 2020 | Jul 24, 2020  |
| <a href="#">...</a>  | .....            | .....         | .....             | .....     | .....        | .....         |

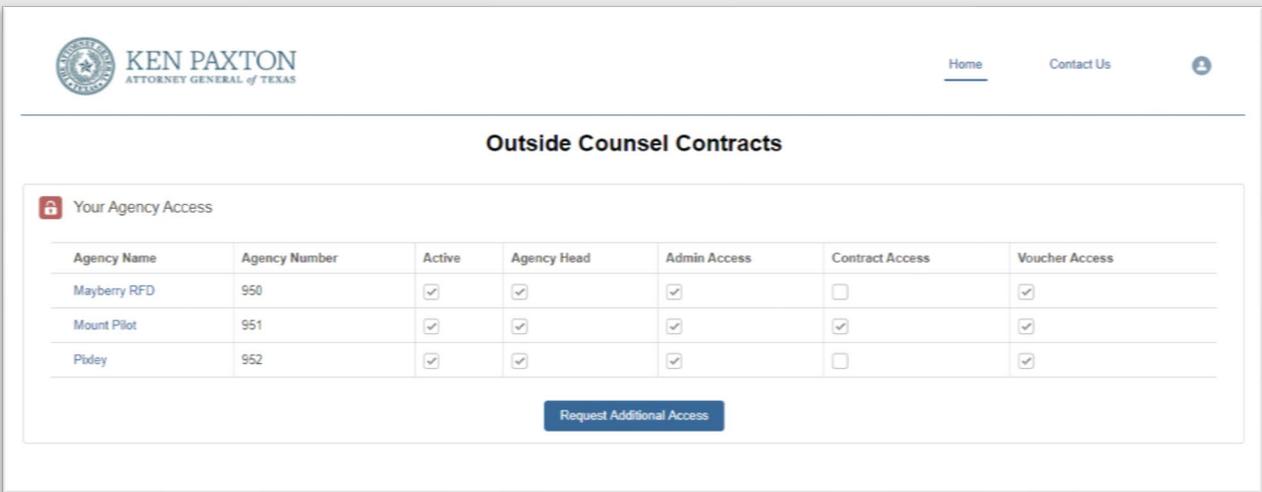
## Voucher Request

### 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.



The screenshot shows the 'Outside Counsel Contracts' page. At the top left is the logo for Ken Paxton, Attorney General of Texas. To the right are links for 'Home' and 'Contact Us'. The main heading is 'Outside Counsel Contracts'. Below this is a section titled 'Your Agency Access' with a lock icon. It contains a table with the following data:

| Agency Name  | Agency Number | Active                              | Agency Head                         | Admin Access                        | Contract Access                     | Voucher Access                      |
|--------------|---------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Mayberry RFD | 950           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Mount Pilot  | 951           | <input checked="" type="checkbox"/> |
| Pixley       | 952           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |

Below the table is a blue button labeled 'Request Additional Access'.

3. Select “Vouchers” to display a list of existing Requests for Voucher Approval for your agency.

Mount Pilot

Admin Contracts **Vouchers** Return

Requests for Voucher Approval List New

Filter

| Actions              | Voucher ID | Voucher Approval ID | Status    | Billing Start Date | Billing End Date | Created Date |
|----------------------|------------|---------------------|-----------|--------------------|------------------|--------------|
| <a href="#">View</a> | 00000296   | 2020-951-0082       | Draft     | Jul 28, 2020       | Aug 6, 2020      | Aug 13, 2020 |
| <a href="#">View</a> | 00000194   | 2020-951-0082       | Submitted | Jan 1, 2020        | Jan 31, 2020     | Feb 16, 2020 |

## 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).

The screenshot shows a web application interface for the Attorney General of Texas. At the top left is the logo for Ken Paxton, Attorney General of Texas. To the right are links for 'Home' and 'Contact Us', and a user profile icon. The main content area has a header with 'Mount Pilot' and 'New Request for Voucher Approval'. Below this is a 'Voucher' section with a blue bar. A light blue box contains an information icon and the text: 'Enter a complete Outside Counsel Contract number and hit Enter on your keyboard.' Below this are input fields for 'Contract Number', '\* Contract ID', 'Billing Start Date', and 'Billing End Date'. 'Cancel' and 'Save' buttons are located to the right of the 'New Request for Voucher Approval' header.

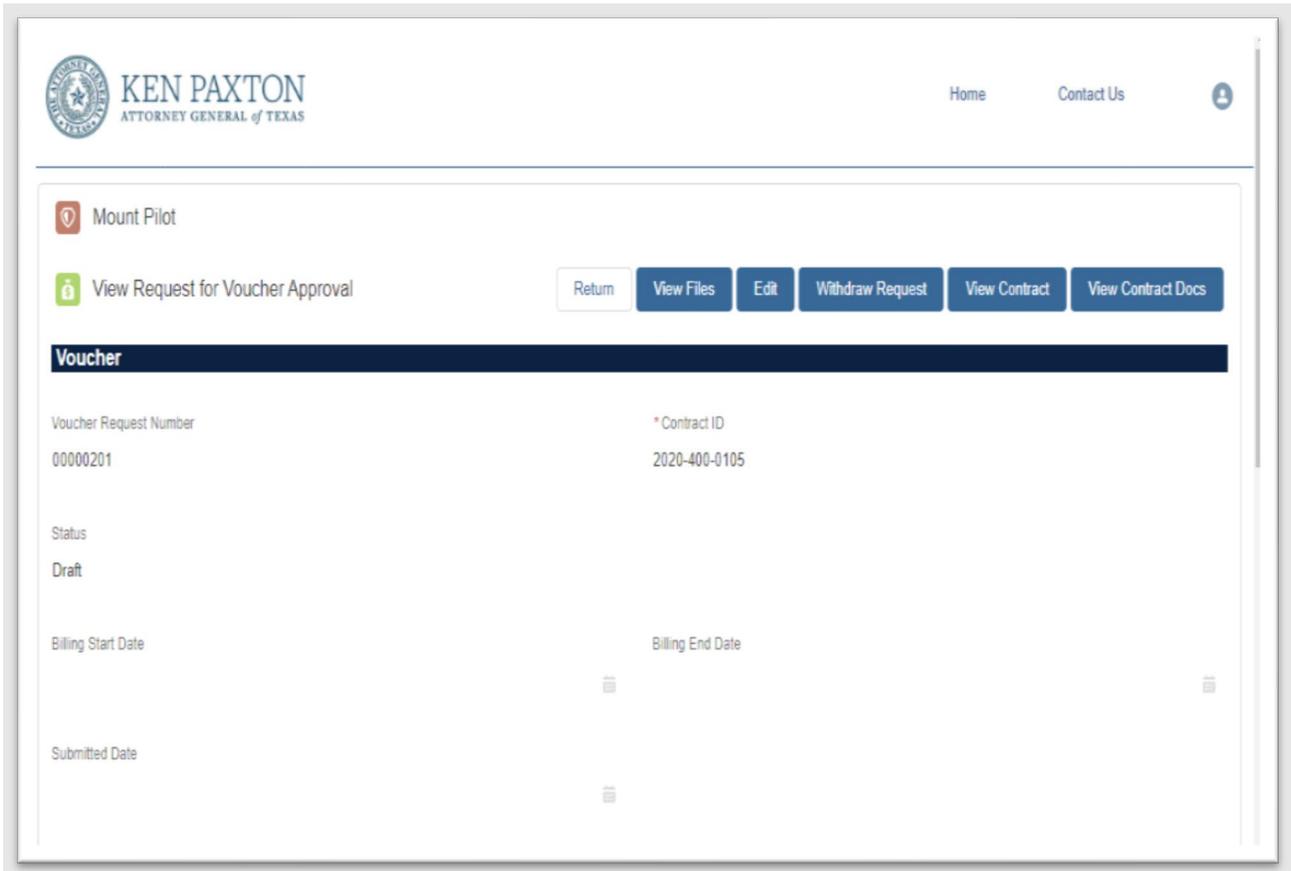
### Creating a Draft of your Request for Voucher Approval

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.

The screenshot shows the Ken Paxton Attorney General of Texas portal. At the top left is the logo and name 'KEN PAXTON ATTORNEY GENERAL of TEXAS'. To the right are links for 'Home' and 'Contact Us'. Below the header, there are two main sections: 'Mount Pilot' and 'New Request for Voucher Approval'. The 'New Request for Voucher Approval' section has a 'Cancel' button and a 'Save' button. Below this is a 'Voucher' section with a search bar. The search bar contains the text 'Search for an Outside Counsel Contract. Enter complete Contract ID and hit Enter on your keyboard.' Below the search bar, there is a 'Search for a Contract' input field and a '\* Contract ID' field containing the value '2020-400-0105'. At the bottom, there are two date pickers: 'Billing Start Date' and 'Billing End Date'.

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

The screenshot shows the Ken Paxton Attorney General of Texas website. The header includes the state seal and the text "KEN PAXTON ATTORNEY GENERAL of TEXAS". Navigation links for "Home" and "Contact Us" are present. A "Mount Pilot" logo is also visible. The main content area features a "View Request for Voucher Approval" section with a toolbar containing buttons for "Return", "View Files", "Edit", "Withdraw Request", "View Contract", and "View Contract Docs". Below this, a "Voucher" section displays the following information:

|                        |                  |
|------------------------|------------------|
| Voucher Request Number | * Contract ID    |
| 00000296               | 2020-951-0082    |
| Status                 |                  |
| Draft                  |                  |
| Billing Start Date     | Billing End Date |
| Jul 28, 2020           | Aug 6, 2020      |

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.

The screenshot displays the Mount Pilot web application interface. At the top left is the Ken Paxton Attorney General of Texas logo. Navigation links for 'Home' and 'Contact Us' are in the top right. Below the logo, there are three tabs: 'Contracts', 'Vouchers', and 'Return'. The 'Return' tab is active. Below the tabs is a section titled 'Requests for Voucher Approval List' with a 'New' button on the right. A 'Filter' input field is present. Below the filter is a table with the following data:

| Actions              | Voucher ID | Voucher Approval ID | Status    | Billing Start Date | Billing End Date | Created Date |
|----------------------|------------|---------------------|-----------|--------------------|------------------|--------------|
| <a href="#">View</a> | 00000201   | 2020-400-0105       | Draft     |                    |                  | Oct 13, 2020 |
| <a href="#">View</a> | 00000149   | 2020-400-0109       | Draft     | Sep 1, 2020        | Sep 30, 2020     | Sep 24, 2020 |
| <a href="#">View</a> | 00000148   | 2020-400-0109       | Submitted | Aug 1, 2020        | Sep 30, 2020     | Sep 24, 2020 |

## 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.

**Validation**

Valid Voucher

Items Required

- Billing Period Start Date is required.
- Billing Period End Date is required.
- Invoices are required.
- Non-Appropriated Funds Used is required.
- Agency-Tracked Total Paid-to-Date is required.
- Date Received by Agency is required.
- Date Approved by Agency is required.
- Agency Approver Title is required.
- Agency Approver Name is required.
- Agency Approver Email is required.
- At least one Invoice File Attachment is required.

Updates Required

[Return](#) [Top of Form](#) [Edit](#)

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.

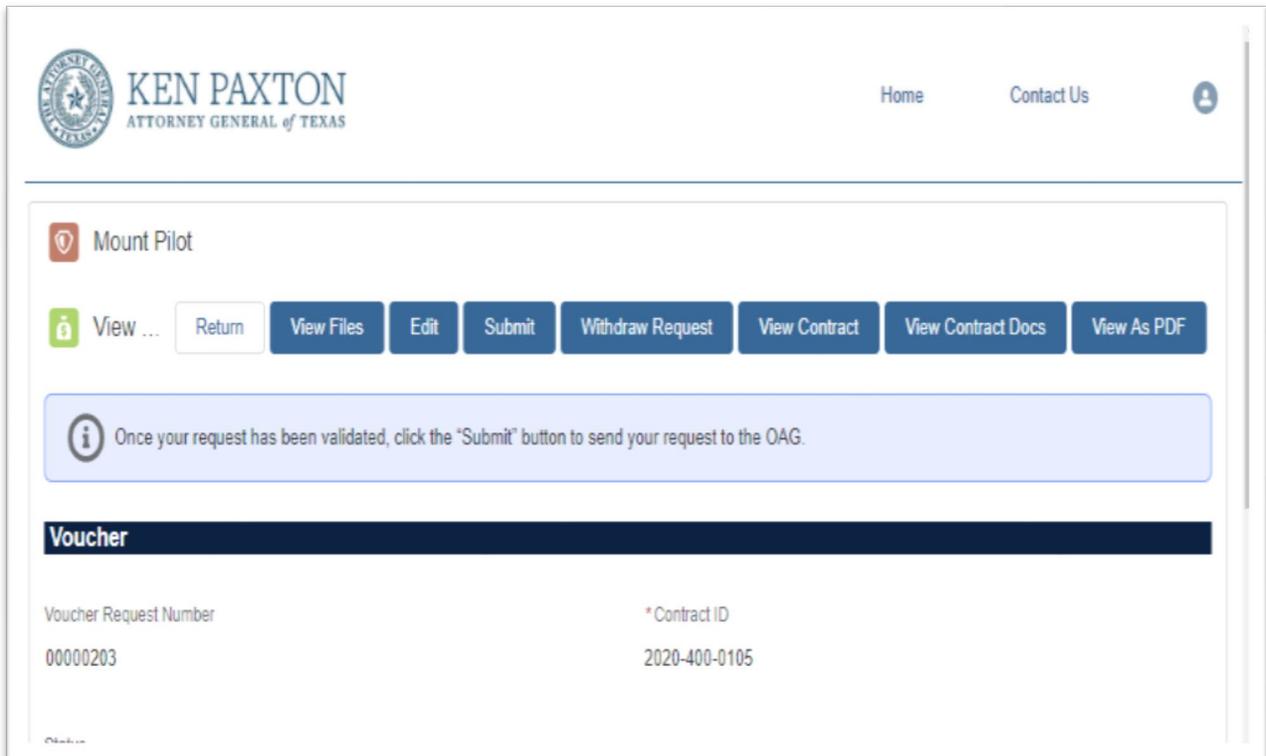
The screenshot shows a web form with three input fields at the top: a dropdown menu with 'Mr' selected, a text field containing 'I Approve', and a text field containing 'iapprove@gmail.com'. Below these fields is a dark blue header bar with the word 'Validation' in white. Underneath the header, there is a checked checkbox labeled 'Valid Voucher'. Below the checkbox, the text 'Items Required' is followed by the message 'All required items have been completed and your Request for Voucher Approval is valid.' Below this message, the text 'Updates Required' is followed by a dark blue horizontal bar. At the bottom of the form, there are four buttons: 'Cancel', 'Top of Form', 'Save', and 'Save & Continue'.

## Working with Files

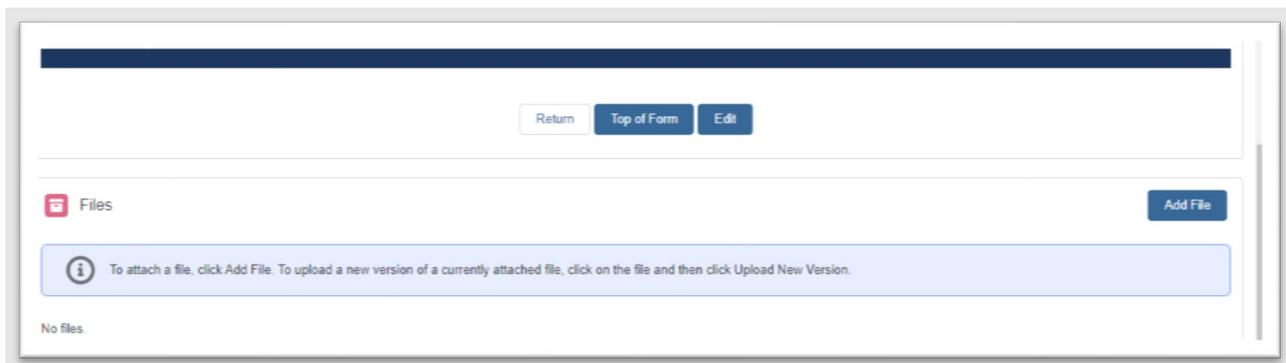
At least one invoice must be attached to pass validation and allow for submission:

### Attaching Files

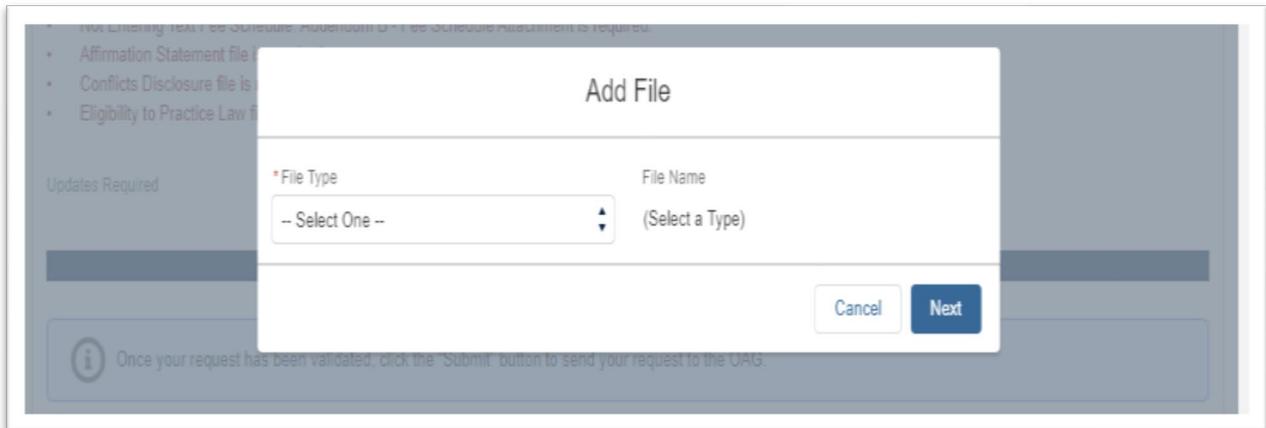
1. Select “View Files” while viewing the draft to go to the files section. (View Files is not available while in edit mode).



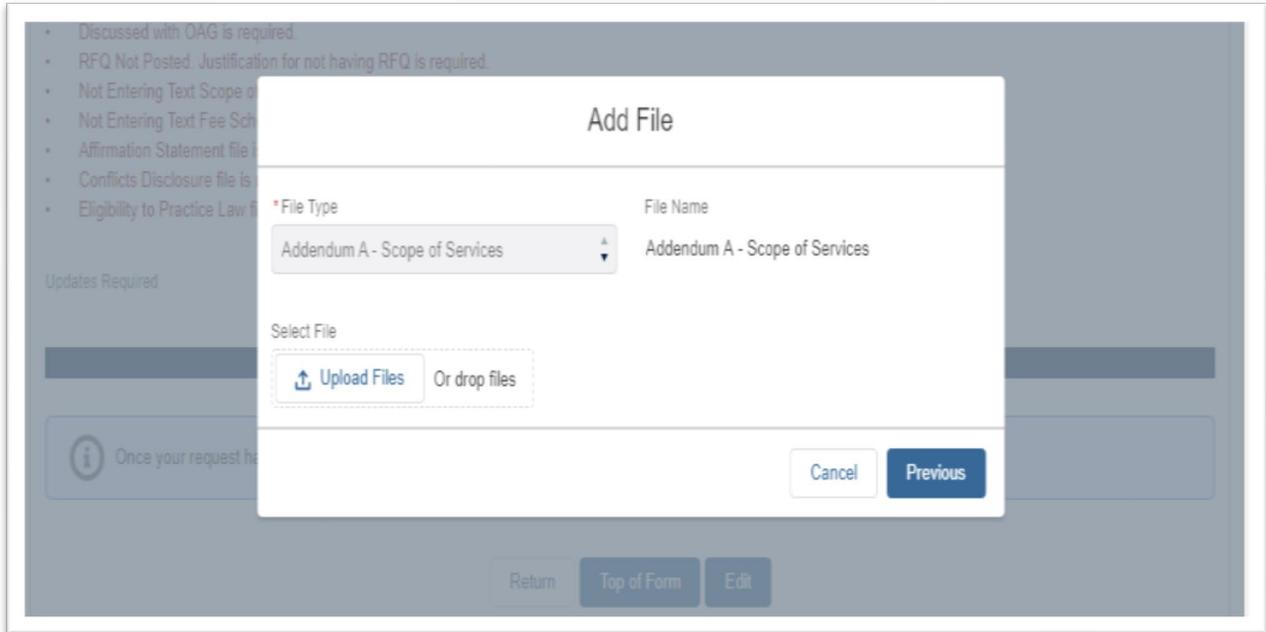
2. Select “Add File” to go to the Add File dialogue.



3. Select file type from the File Type dropdown and select “Next”.



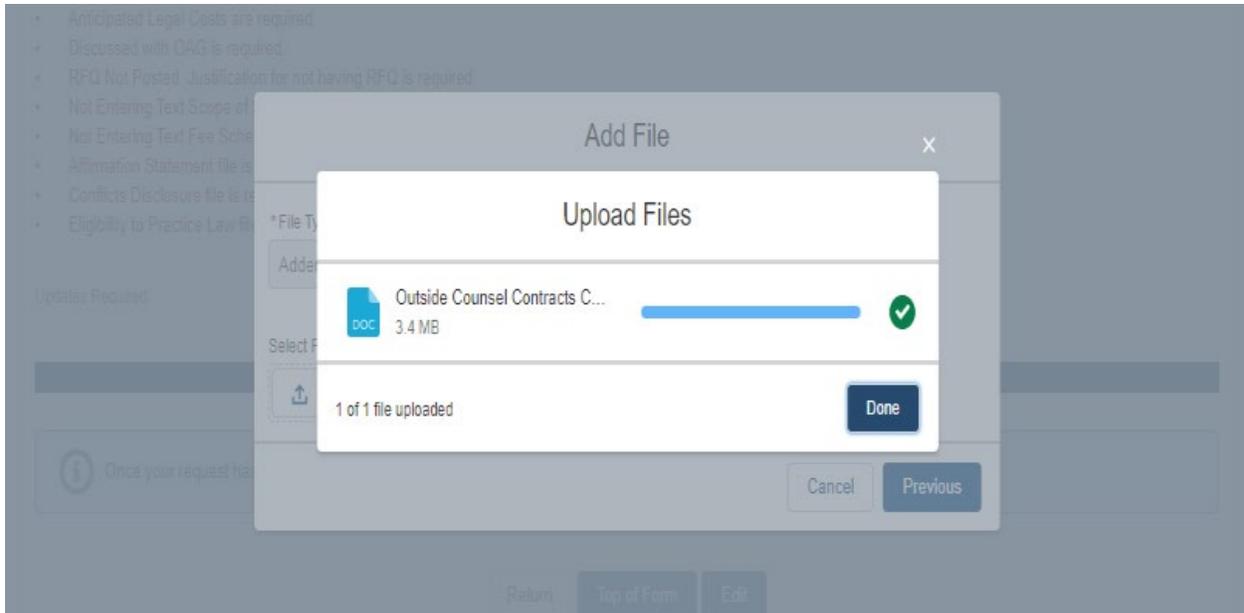
4. Select “Upload File”, choose the file you want to upload, and select “Open”.



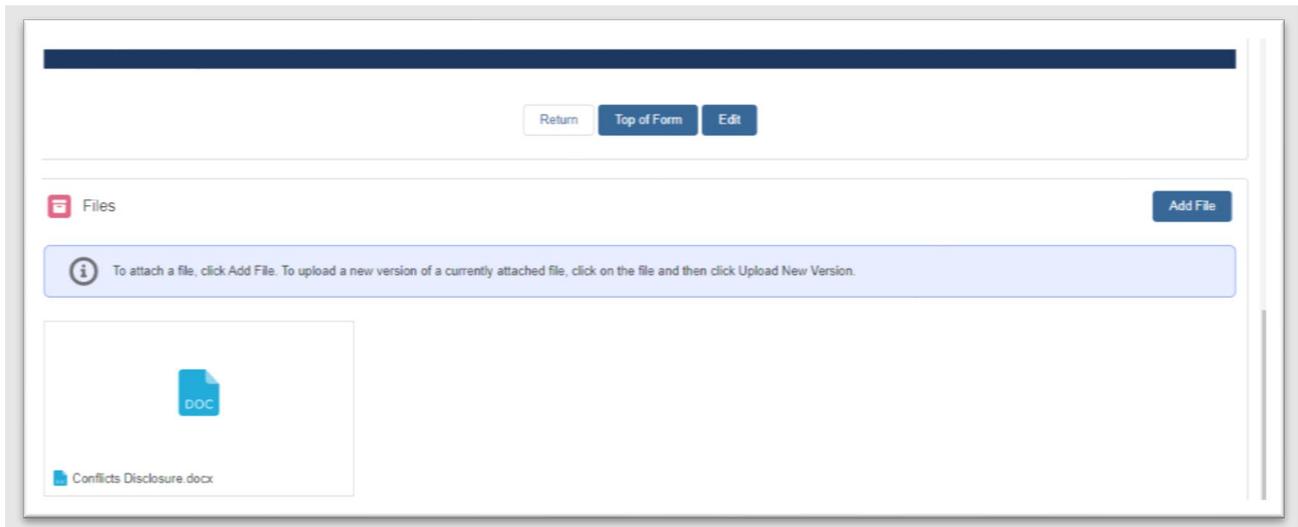
Alternatively, you can drag and drop your files to the File upload area

Note: The file upload will begin immediately

This screen will display showing the progress of your file upload.



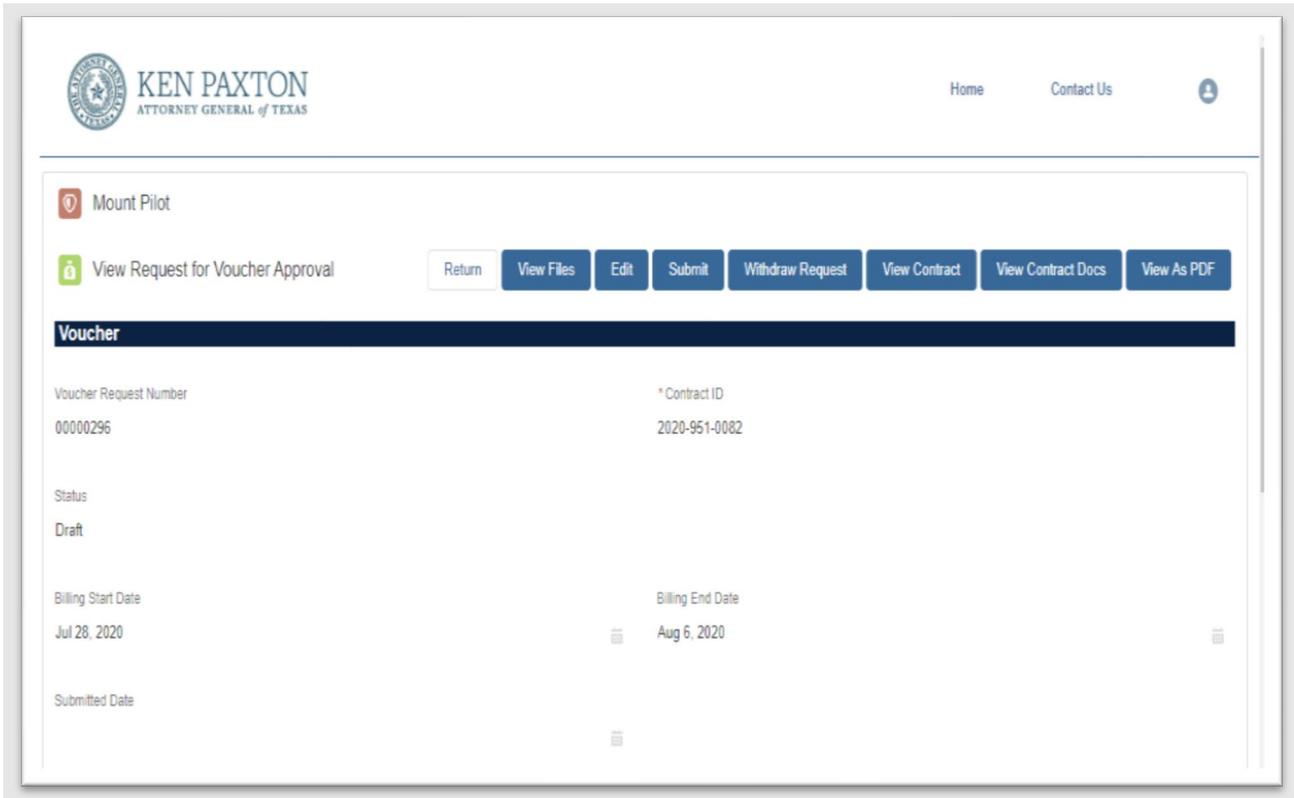
Once the file has been uploaded it will be displayed in the Files section.



### 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.





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.

The screenshot displays a web application interface for submitting a voucher request. A modal window titled "Submit Voucher Request" is centered on the screen. The background shows a sidebar with a "Validation" section containing a "Valid Voucher" checkbox and a main area with a "Justification for Late Voucher" text input field. The modal window contains the following elements:

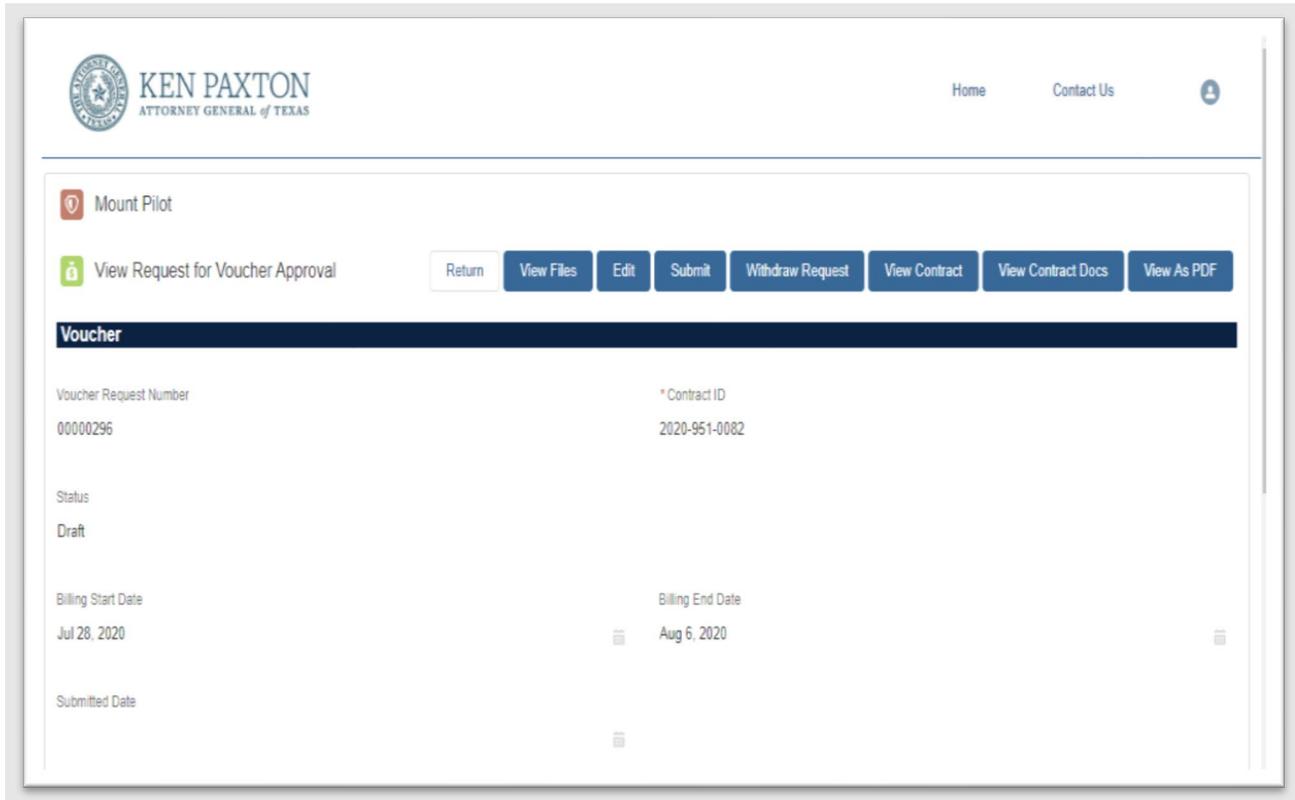
- Title:** Submit Voucher Request
- Validation Message:** A blue box with an information icon (i) and the text: "Voucher submitted more than 25 days after it was received by the Agency. Justification is required." To the right of this message, a red asterisk (\*) is followed by the text "indicates a required field".
- Input Field:** A text input field with a red border, containing the text "\* Justification for Late Voucher". Below the field, the text "Justification is required" is displayed in red.
- Buttons:** "Cancel" and "Save" buttons are located at the bottom right of the modal.

At the bottom of the background page, there are navigation buttons: "Return", "Top of Form", "Edit", and "Submit".

## 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 be viewable.

## Community User Administration

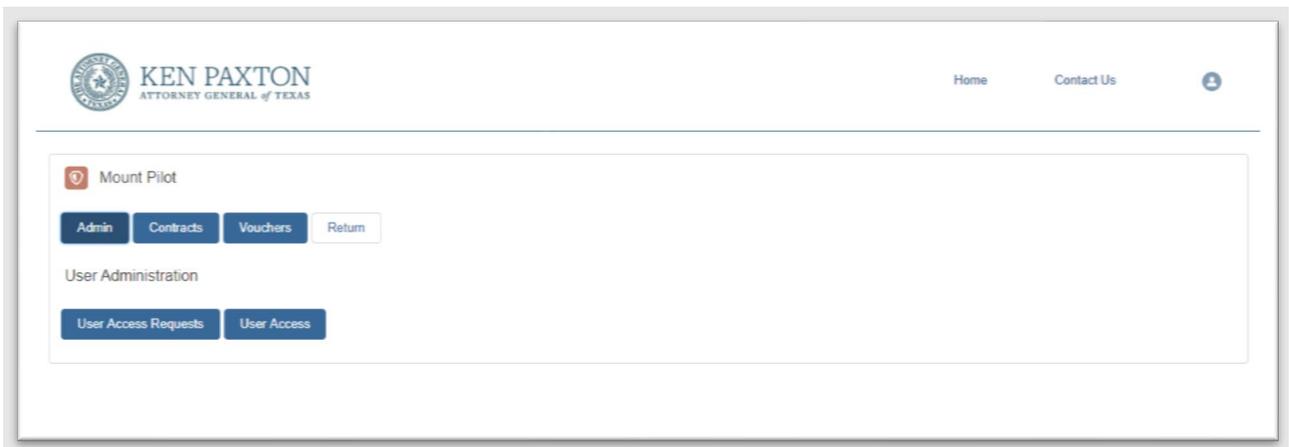
Every Agency must have a “Head of Agency” user to work within Community. The Head of Agency has the responsibility for approving or rejecting user access requests for Community access to perform roles within their agency. In addition to managing user access requests they can change the rights of a registered 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.

**KEN PAXTON**  
ATTORNEY GENERAL of TEXAS

Home Contact Us

Mount Pilot

Admin Contracts Vouchers Return

User Administration

User Access Requests User Access

User Access Requests List

Filter

| Actions              | Date Requested | Requester Title  | Requester Last Name | Requester First Name | Requester Phone | Requester Email              | Role                           | Status           |
|----------------------|----------------|------------------|---------------------|----------------------|-----------------|------------------------------|--------------------------------|------------------|
| <a href="#">View</a> | Sep 10, 2020   | Contract Manager | Barber              | Floyd                | 5555555555      | cocoaagencyuser+20@gmail.com | Contract and Voucher Requester | Pending approval |
| <a href="#">View</a> | Dec 11, 2019   | Aunt             | Taylor              | Bea                  | 2222222222      | cocoaagencyuser+16@gmail.com | Agency Head                    | Approved         |
| <a href="#">View</a> | Dec 9, 2019    | Sheriff          | Taylor              | Andy                 | 2222222222      | cocoaagencyuser+15@gmail.com | Agency Head                    | Approved         |
| <a href="#">View</a> | Dec 9, 2019    | Aunt             | Taylor              | Bea                  | 2222222222      | cocoaagencyuser+16@gmail.com | Agency Head                    | Approved         |

## Approving User Access Requests

1. Select “Approve”. The User Access Request List will display with the user’s request status updated to Approved.

The screenshot displays the Mount Pilot web application interface. At the top left is the Ken Paxton Attorney General of Texas logo. Navigation links for 'Home' and 'Contact Us' are in the top right. The main content area is titled 'Mount Pilot' and includes a navigation menu with 'Admin', 'Contracts', 'Vouchers', and 'Return'. Below this is the 'User Administration' section with 'User Access Requests' and 'User Access' buttons. The 'View User Access Request' form shows the following details:

|                 |                  |                      |                              |                     |                                |
|-----------------|------------------|----------------------|------------------------------|---------------------|--------------------------------|
| Request Number  | 00000624         | Date Requested       | Sep 11, 2020                 | Requester Last Name | Peoples                        |
| Requester Title | Contract Manager | Requester First Name | Peggy                        | Role                | Contract and Voucher Requester |
| Requester Phone | 5555555555       | Requester Email      | cocoaagencyuser+22@gmail.com |                     |                                |
| Status          | Pending approval | Reason Rejected      |                              |                     |                                |

Buttons for 'Cancel', 'Approve', and 'Reject' are located at the top right and bottom center of the form.

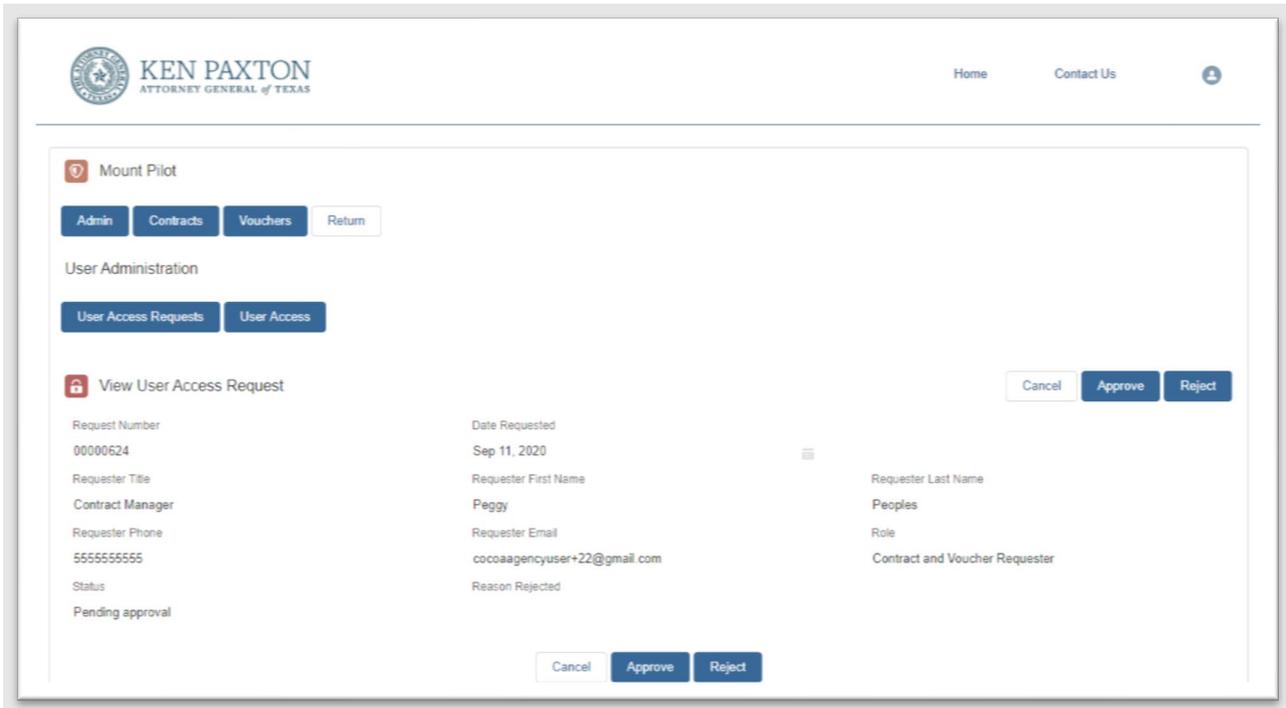
They are now a registered user of the Community for your agency.

The screenshot displays the Mount Pilot web application interface. At the top left is the logo for Ken Paxton, Attorney General of Texas. Navigation links for 'Home' and 'Contact Us' are in the top right. The main content area is titled 'Mount Pilot' and includes buttons for 'Admin', 'Contracts', 'Vouchers', and 'Return'. Below this is a 'User Administration' section with 'User Access Requests' and 'User Access' buttons. The 'User Access Requests List' section features a filter input field and a table with the following data:

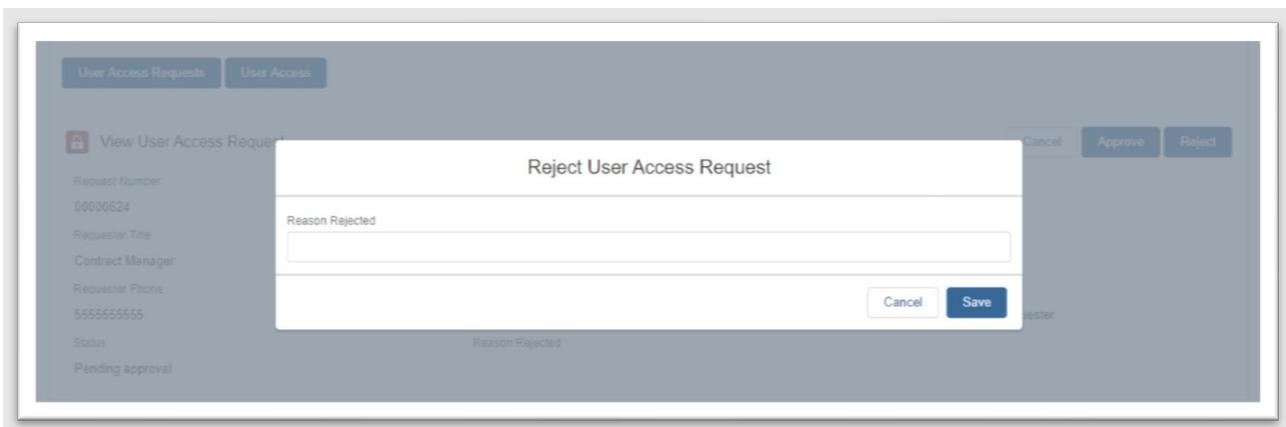
| Actions              | Date Requested | Requester Title  | Requester Last Name | Requester First Name | Requester Phone | Requester Email              | Role                           | Status           |
|----------------------|----------------|------------------|---------------------|----------------------|-----------------|------------------------------|--------------------------------|------------------|
| <a href="#">View</a> | Sep 10, 2020   | Contract Manager | Peoples             | Peggy                | 5555555555      | cocoaagencyuser+22@gmail.com | Contract and Voucher Requester | Pending approval |
| <a href="#">View</a> | Sep 10, 2020   | Contract Manager | Barber              | Floyd                | 5555555555      | cocoaagencyuser+20@gmail.com | Contract and Voucher Requester | Approved         |
| <a href="#">View</a> | Dec 11, 2019   | Aunt             | Taylor              | Bea                  | 2222222222      | cocoaagencyuser+16@gmail.com | Agency Head                    | Approved         |
| <a href="#">View</a> | Dec 9, 2019    | Sheriff          | Taylor              | Andy                 | 2222222222      | cocoaagencyuser+15@gmail.com | Agency Head                    | Approved         |
| <a href="#">View</a> | Dec 9, 2019    | Aunt             | Taylor              | Bea                  | 2222222222      | cocoaagencyuser+16@gmail.com | Agency Head                    | Approved         |

## 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.

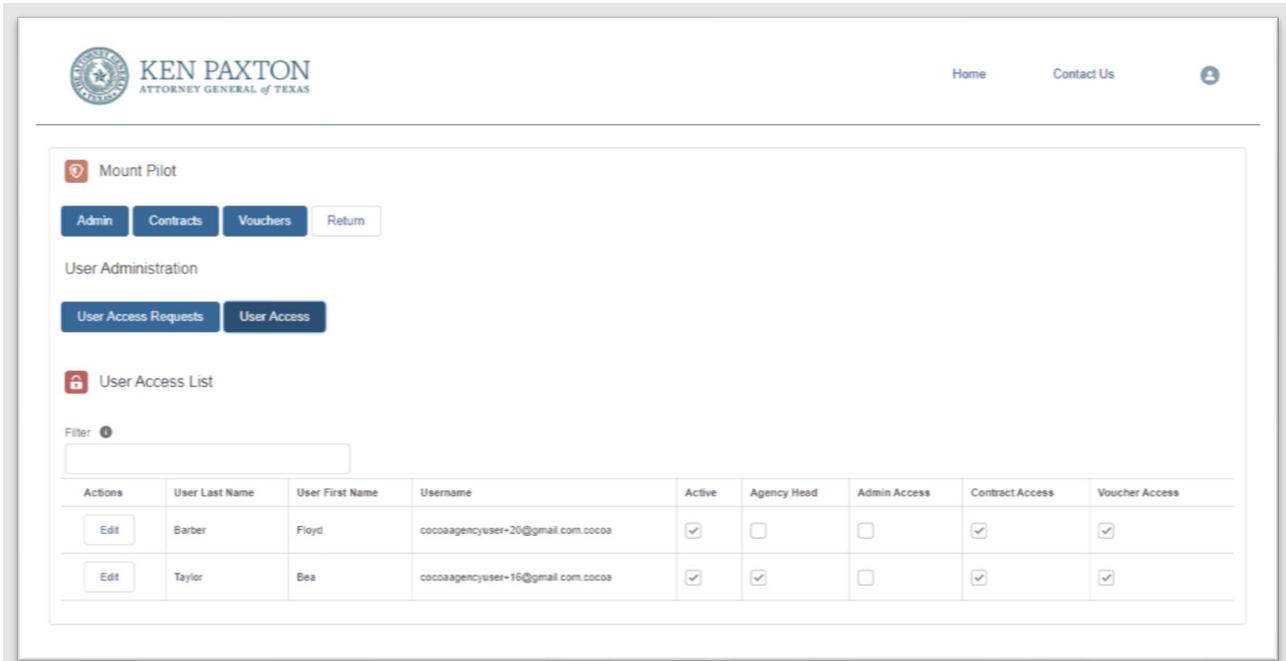


## Managing User Access Rights

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.

The screenshot shows the 'Edit User Access' form within the Mount Pilot application. The page header includes the Ken Paxton Attorney General of Texas logo and navigation links for 'Home' and 'Contact Us'. The main content area is titled 'Mount Pilot' and contains a breadcrumb trail: 'Admin' > 'Contracts' > 'Vouchers' > 'Return'. Below this is a 'User Administration' section with 'User Access Requests' and 'User Access' buttons. The 'Edit User Access' form displays the following information:

| User First Name | User Last Name | Username                           |
|-----------------|----------------|------------------------------------|
| Floyd           | Barber         | cocoaagencyuser+20@gmail.com.cocoa |

Below the user information, there are five checkboxes for user rights:

- Active
- Agency Head
- Admin Access
- Contract Access
- Voucher Access

At the bottom of the form are 'Cancel' and 'Save' buttons.