

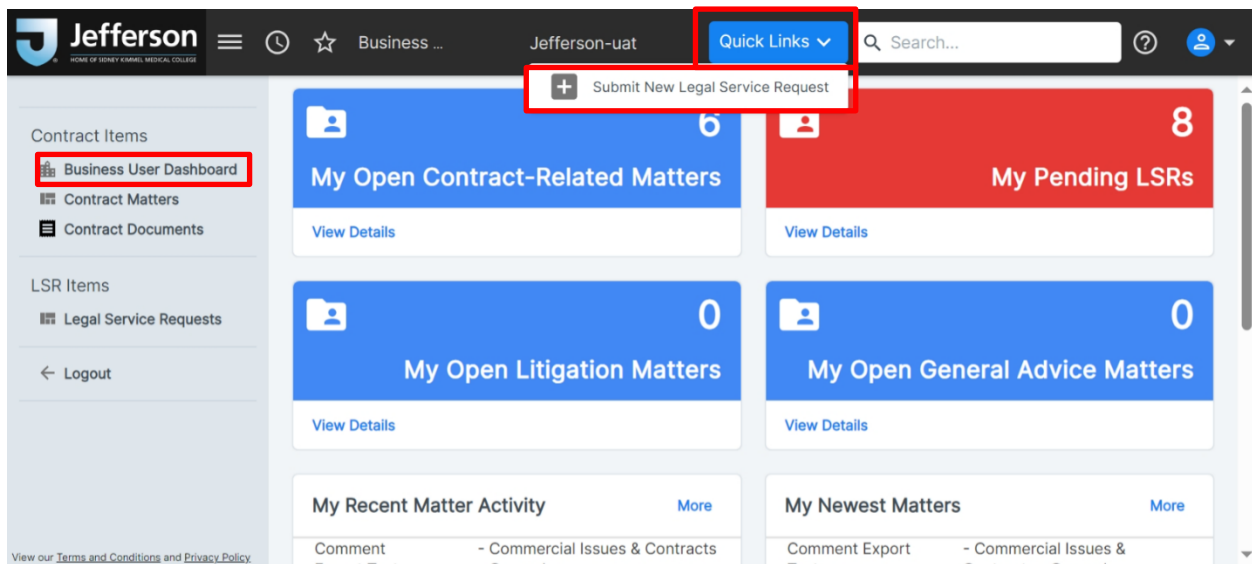


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A. Submit New Legal Service Requests

1. Access Onit Legal Service Request (LSR) portal by clicking this link: <https://jefferson.onit.com>. If the link does not open, you will have to copy and paste the link into your internet browser. Login using your Jefferson Single-Sign-On (SSO) credentials.
2. Your default home page will be the **Business User Dashboard**. Click the **Quick Links** dropdown and select **Submit New Legal Service Request**.



3. An LSR intake form launches. A red asterisk next to a field name indicates a Required field. Accurate and complete responses in all fields help Legal and Supply Chain properly assign your LSR to the appropriate subject matter expert.

Legal Service Request

[Create Request](#)

Legal Service Request Category *

Matter Type *

Opened On

Brief Description *

Jefferson Location related to LSR *

Are you the Primary Business Contact? Yes No

Secondary Business Contact?

Relevant attachment

Additional Documentation

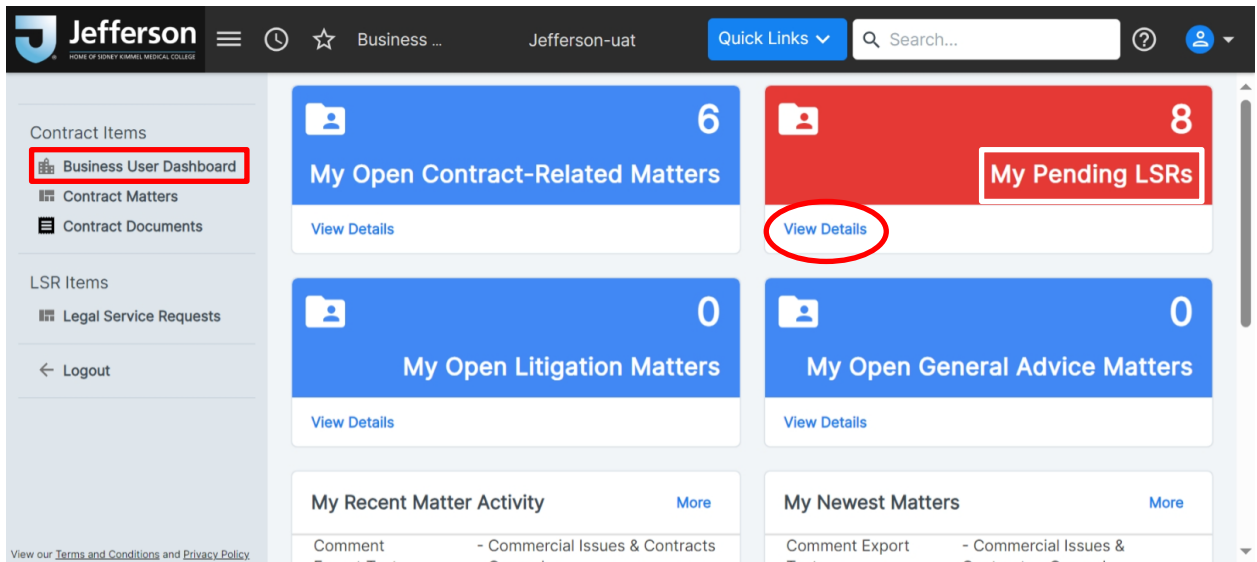
Additional Documentation

Additional Comments

- a. **Legal Service Request Category:** Select Contract-Related in dropdown.
 - b. **Matter Type and Matter Subtype:** Choose the appropriate Matter Type and Matter Subtype (see separate guide for Matter Type/Subtype relationships). **IMPORTANT NOTE: only LSRs with Matter Subtype: Supply Chain are routed to Supply Chain Management for assignment. All other LSRs are routed to Legal for assignment.**
 - c. **Brief Description:** Enter a description of your contracting need.
 - d. **Jefferson Location related to LSR:** Choose the Jefferson location that needs the contract.
 - e. **Are you the Primary Business Contact?:** Click 'No' only if you are submitting this request on behalf of someone else. The Primary Business Contact is the individual who will manage the contract relationship and receive notifications about upcoming expirations or auto-renewal deadlines.
 - f. **Secondary Business Contact?:** Check this box to include more Business Contacts who need to be involved in the contract negotiation.
 - g. **Attachments and Additional Comments:** Add all relevant documents (financials, third-party contract, etc.) and additional comments that will help the Attorney or Contract Administrator build or negotiate the contract.
4. Click **Submit**. Upon submission, a system generated notification will be sent to your inbox informing you the request has been submitted to Legal or Supply Chain for assignment.

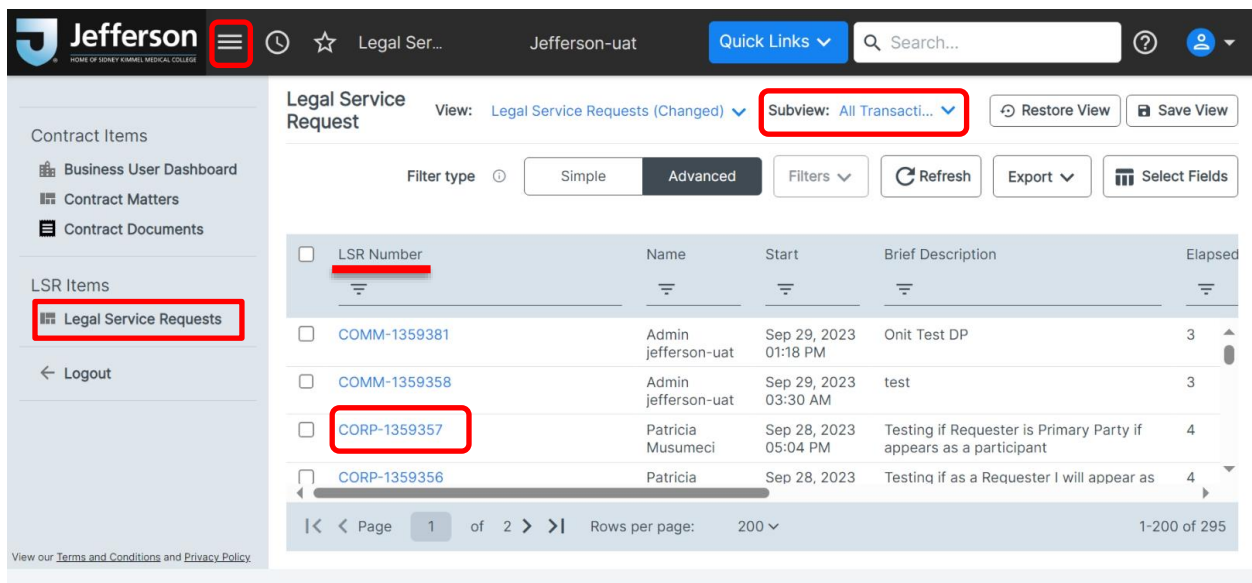
B. View Existing Legal Service Requests

- To view your pending LSR, navigate to the **Business User Dashboard** and click the “**View Details**” link in the **My Pending LSRs** widget to launch a grid view of your LSRs that are pending assignment.



The screenshot shows the Business User Dashboard with a sidebar on the left containing 'Contract Items' (Business User Dashboard, Contract Matters, Contract Documents) and 'LSR Items' (Legal Service Requests, Logout). The main area features four widgets: 'My Open Contract-Related Matters' (6 items), 'My Pending LSRs' (8 items, highlighted in red), 'My Open Litigation Matters' (0 items), and 'My Open General Advice Matters' (0 items). Each widget has a 'View Details' link. Below these are sections for 'My Recent Matter Activity' and 'My Newest Matters'.

- Alternatively, you can access a grid view of all LSRs (not just pending LSRs) by clicking on “**Legal Service Requests**” in the left-side Navigation Bar (if the Nav Bar is not visible, click the 3 vertical lines next to our logo). Make sure to select **My Transactions** in the **Subview** dropdown so only your LSRs are displayed. Open your **LSR Record** by clicking on the blue **LSR Number** that corresponds to that LSR.



The screenshot shows the 'Legal Service Request' grid view. The left sidebar has 'Legal Service Requests' highlighted in red. The main area shows a table of LSRs with the following data:

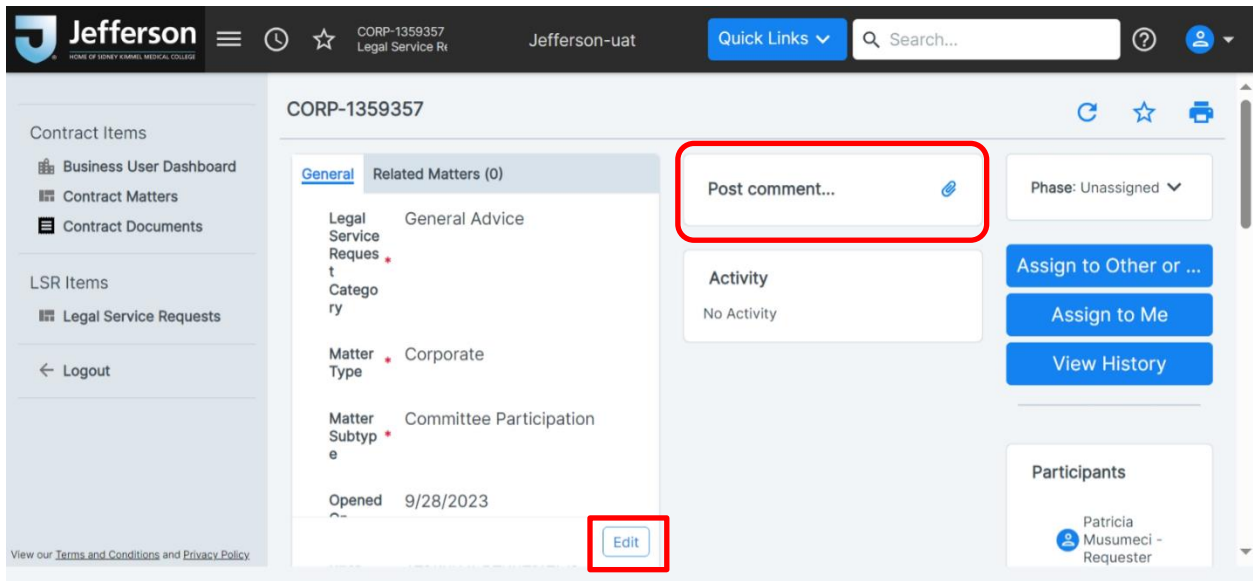
LSR Number	Name	Start	Brief Description	Elapsed
COMM-1359381	Admin jefferson-uat	Sep 29, 2023 01:18 PM	Onit Test DP	3
COMM-1359358	Admin jefferson-uat	Sep 29, 2023 03:30 AM	test	3
CORP-1359357	Patricia Musumeci	Sep 28, 2023 05:04 PM	Testing if Requester is Primary Party if appears as a participant	4
CORP-1359356	Patricia	Sep 28, 2023	Testing if as a Requester I will appear as	4

The table also includes a 'Subview: All Transacti...' dropdown and a 'Filter type' section with 'Simple' and 'Advanced' options. The bottom of the page shows pagination: 'Page 1 of 2' and 'Rows per page: 200'.

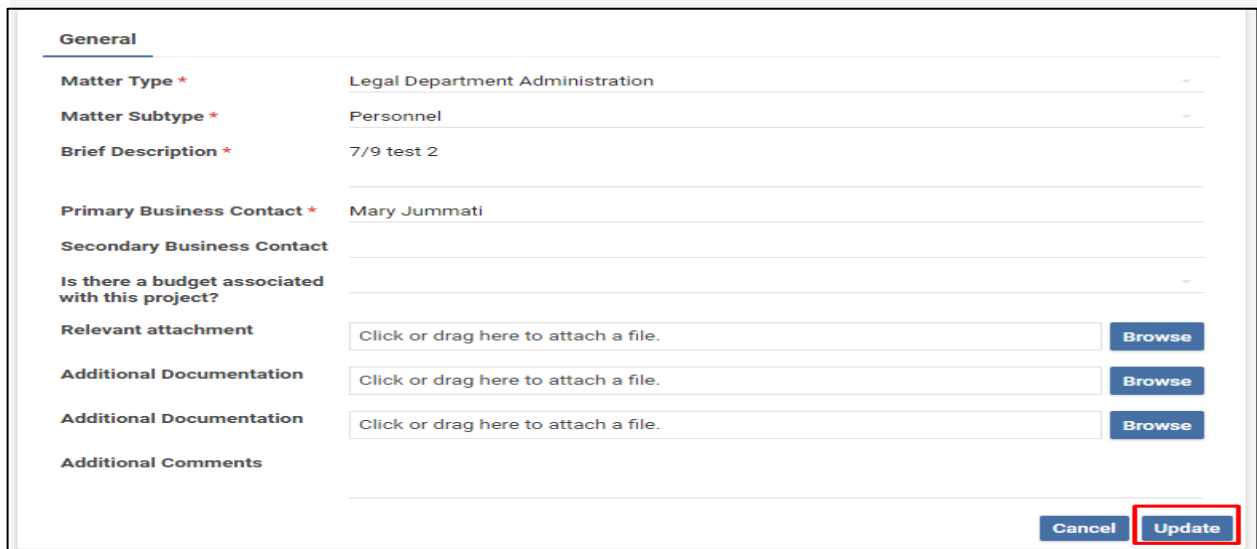
C. Edit Legal Service Requests

To edit existing LSR Records, follow the below steps:

1. Within your open LSR Record, you can edit most fields in the **General** tab by clicking the **Edit** button. When you are done editing, make sure you click the **Update** button. Your changes should be saved.
2. Use the **Collaboration Panel (Post comment...)** to add more information about your request, exchange messages with Legal or Supply Chain about your pending request, or to upload more attachments. Any comments and attachments that are posted to the LSR Record will be automatically exported to the Contract Record when the Law Reviewer (Legal) or Contract Administrator (Supply Chain) takes the assignment and creates the new Contract Record.



The screenshot shows the Jefferson CLM interface for a Legal Service Request (CORP-1359357). The record is in the 'General' tab. A red box highlights the 'Post comment...' button in the top right area. Another red box highlights the 'Edit' button at the bottom center of the record details. The record details include: Matter Type: Corporate, Matter Subtype: Committee Participation, and Opened: 9/28/2023. The right sidebar shows the 'Phase' as 'Unassigned' and a list of participants including Patricia Musumeci - Requester.



The screenshot shows the 'General' tab edit form for the Legal Service Request. The form fields are as follows:

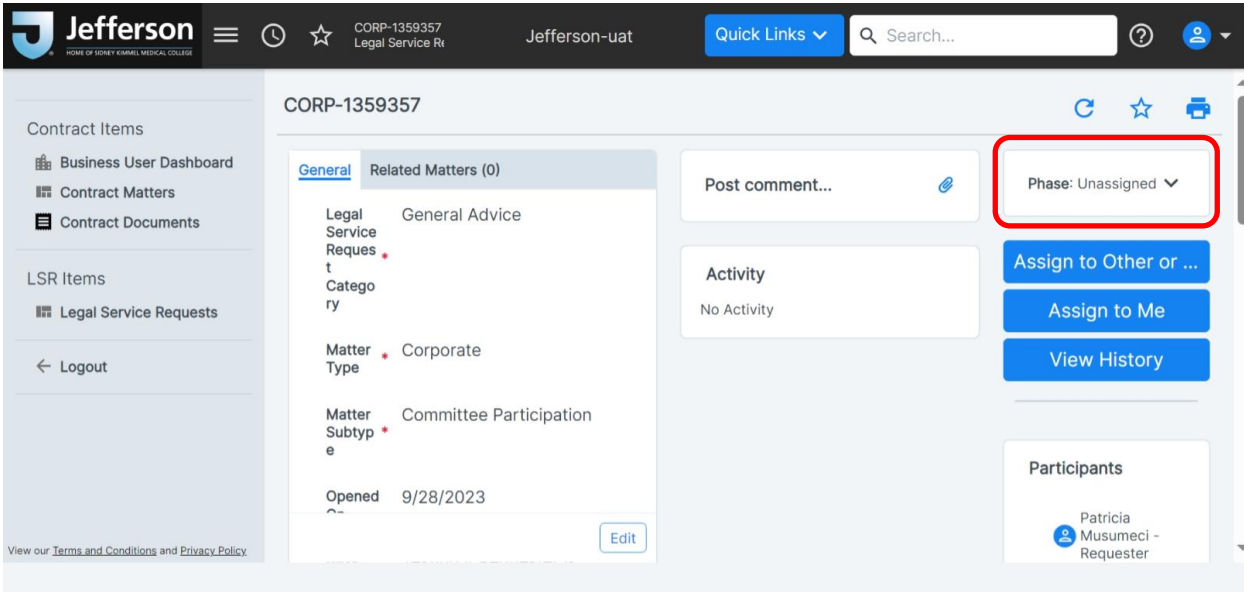
- Matter Type ***: Legal Department Administration
- Matter Subtype ***: Personnel
- Brief Description ***: 7/9 test 2
- Primary Business Contact ***: Mary Jummati
- Secondary Business Contact**: (empty)
- Is there a budget associated with this project?**: (empty)
- Relevant attachment**: Click or drag here to attach a file. [Browse]
- Additional Documentation**: Click or drag here to attach a file. [Browse]
- Additional Documentation**: Click or drag here to attach a file. [Browse]
- Additional Comments**: (empty)

At the bottom right, the 'Update' button is highlighted with a red box.

D. Phases of a Legal Service Request

There are five phases to your LSR submission. It is important to understand the meaning of each phase as additional action may be required from you.

1. **Unassigned:** your LSR has been submitted and is pending assignment by Legal or Supply Chain.
2. **With Attorney or With Contract Administrator:** your LSR has been assigned to an attorney or paralegal (Legal) or Contract Administrator (Supply Chain) and is currently in review.
3. **Awaiting Input from Business Partner:** the assigned attorney or contract administrator has reviewed the request and is requesting additional information from you.
4. **Contract Created:** the assigned attorney or contract administrator has created a new Contract Matter to manage your contract request through to completion. All Comments and Attachments from your LSR are automatically exported into the new Contract Matter created.
5. **Matter Created:** if your LSR is not related to a contract, then the attorney assigned to your LSR has reviewed your request and has promoted the request to a Legal Matter. Further work by the attorney will be managed in this new Legal Matter. All Comments and Attachments from your LSR are automatically exported in to the new Legal Matter created.
6. **Resolved Without Matter Creation:** the attorney or contract administrator resolved your request without having to create a new Contract Matter.

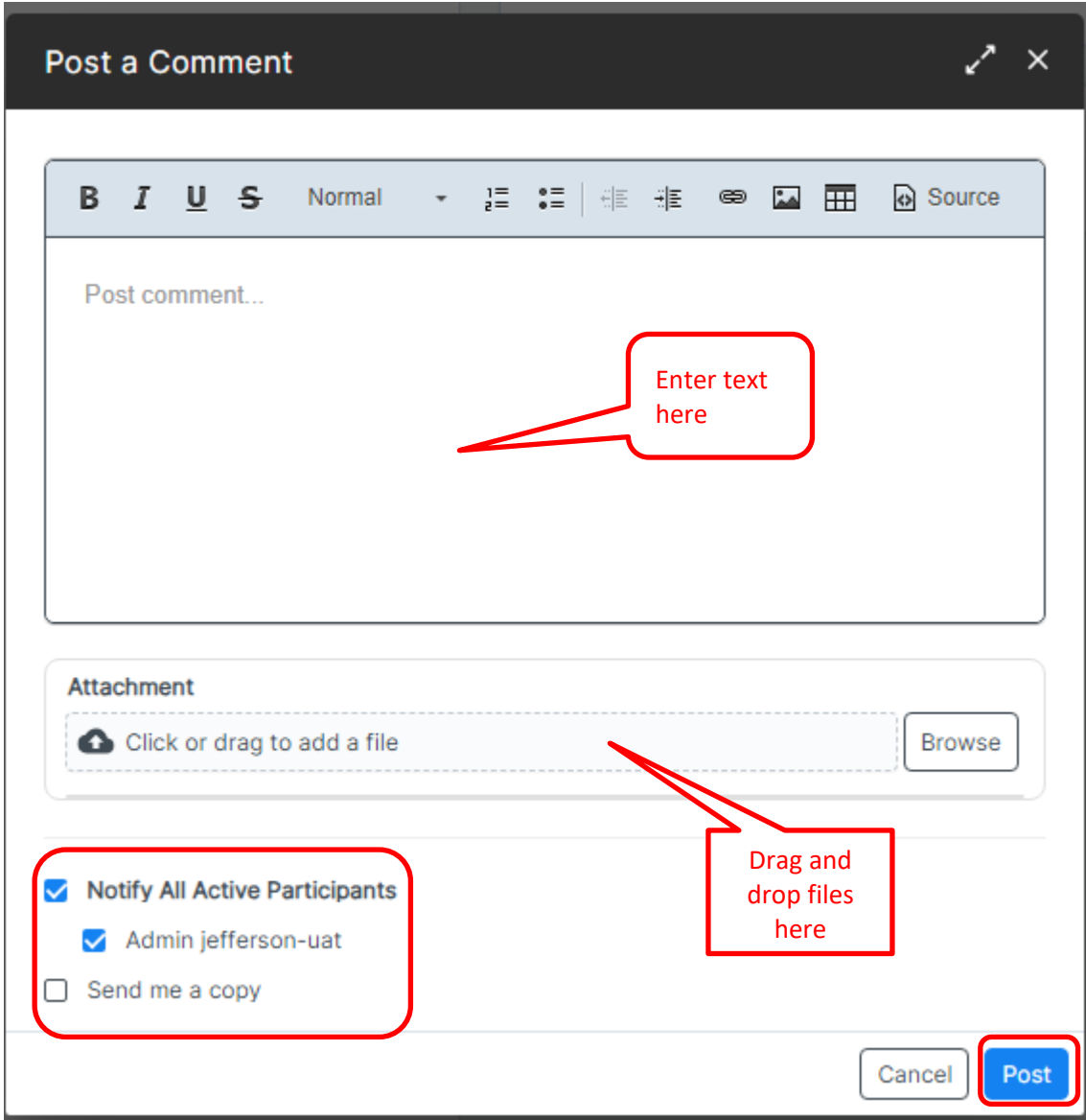


The screenshot displays the Jefferson CLM system interface for a Legal Service Request (LSR) with ID CORP-1359357. The interface includes a top navigation bar with the Jefferson logo, user information (Jefferson-uat), and search functionality. A left sidebar contains navigation options for Contract Items and LSR Items. The main content area shows the LSR details, including the phase 'Unassigned' (highlighted with a red box), and buttons for 'Assign to Other or ...', 'Assign to Me', and 'View History'. The 'Participants' section lists Patricia Musumeci as the requester.

E. Collaboration

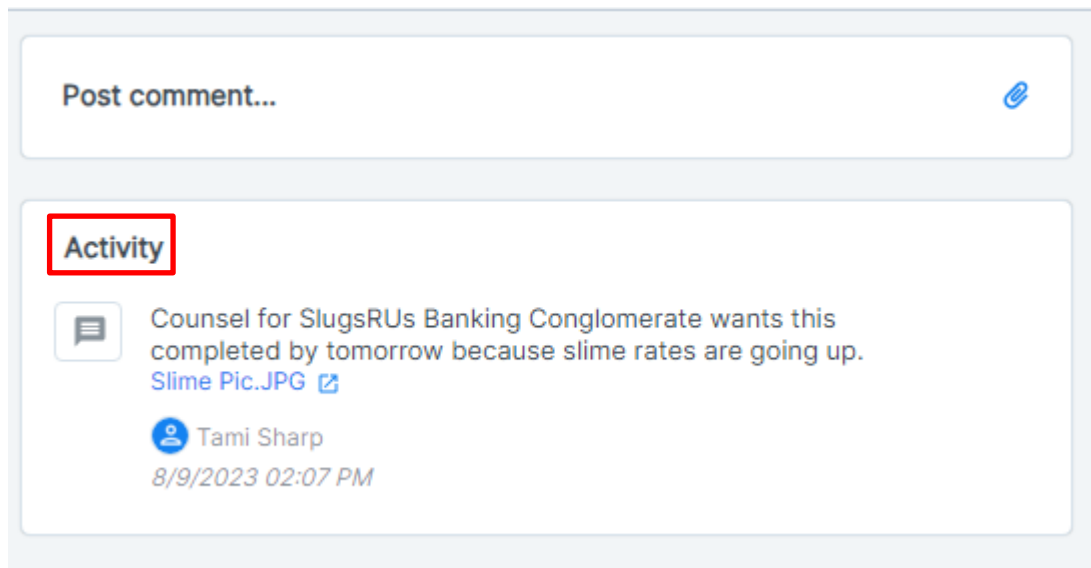
Your LSR Record has a **Collaboration Panel** that can be utilized to communicate with Legal or Supply Chain.

1. Open your LSR Record (see guide above) and click on the “Post comment...” pane.
2. A pop-up window will appear. Enter your comments in the text box and add more attachments (including emails) by simply dragging and dropping the email or document into the dotted line field. Or you can use the Browse button to pull a file from your system.
3. Use the check boxes at the bottom to determine who you want to notify about your new post or attachment.
4. When you are done, click the **Post** button.



The screenshot shows a 'Post a Comment' dialog box with a dark header bar containing the title and window controls. The main content area includes a rich text editor with a toolbar (Bold, Italic, Underline, Strikethrough, Normal, Bulleted List, Numbered List, Indent, Outdent, Link, Image, Table, Source) and a text input field with the placeholder 'Post comment...'. A red callout bubble points to this field with the text 'Enter text here'. Below the text area is an 'Attachment' section with a dashed border and a 'Browse' button. A red callout bubble points to this area with the text 'Drag and drop files here'. At the bottom left, there are three checkboxes: 'Notify All Active Participants' (checked), 'Admin jefferson-uat' (checked), and 'Send me a copy' (unchecked). A red callout bubble encloses these checkboxes. At the bottom right, there are 'Cancel' and 'Post' buttons, with the 'Post' button highlighted by a red callout bubble.

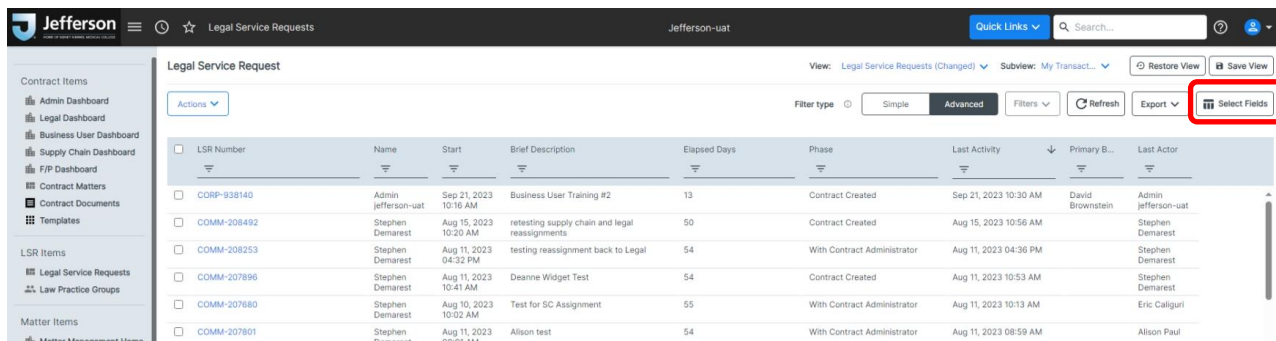
5. Your new comments and attachments are recorded in the **Activity Panel** of the LSR Record. All comments and attachments are automatically exported into the Activity Panel of any Contract Matter subsequently created.



F. Quick Tips

1. Grid Views

- i. You can customize your **Grid View** (see Section B above for screen shots) to display fields (Column Headers) that help you track your LSRs. Simply click the **Select Fields** button.



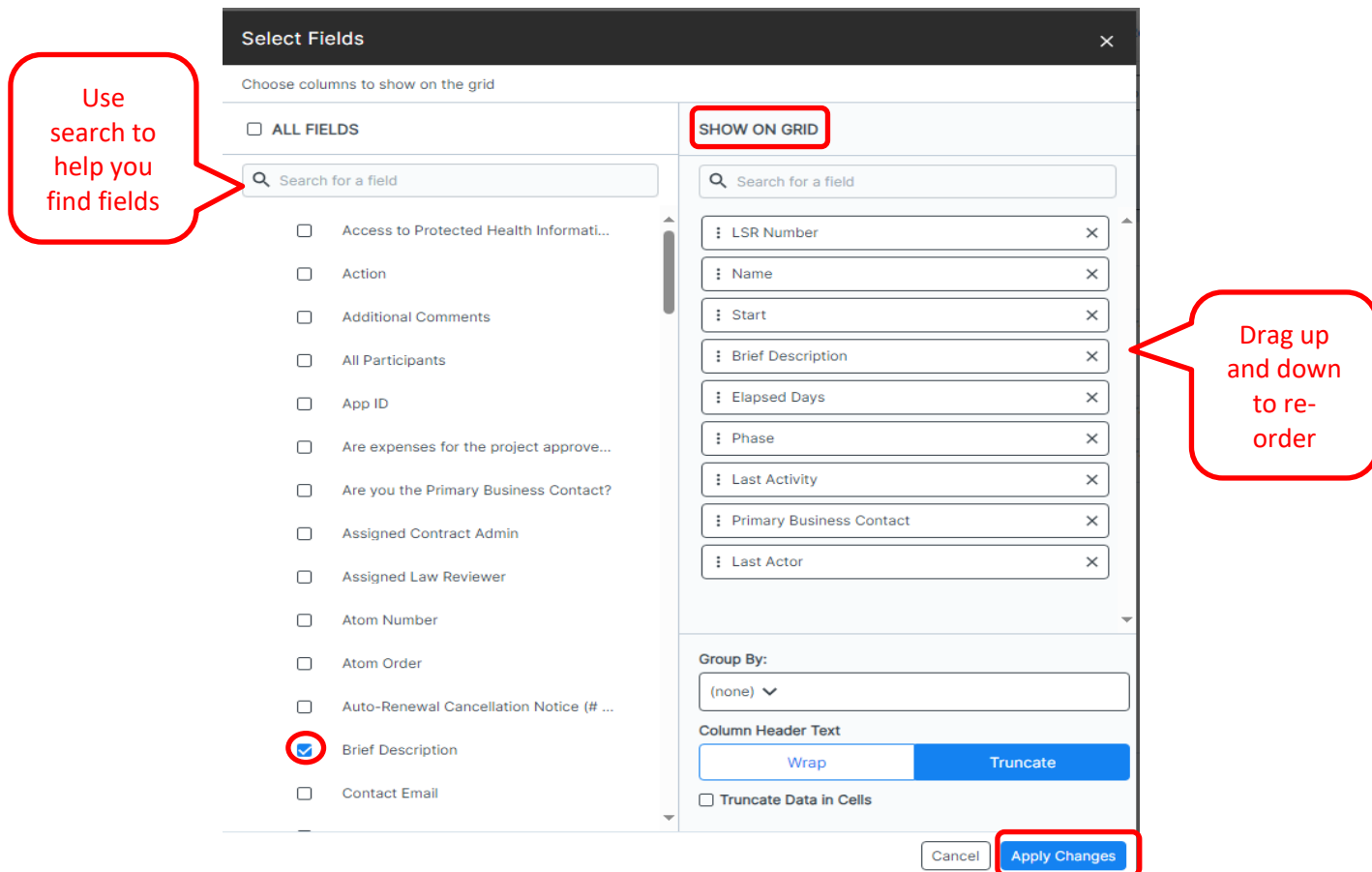
Legal Service Request

View: Legal Service Requests (Changed) Subview: My Transact... Restore View Save View

Filter type: Simple Advanced Filters Refresh Export Select Fields

LSR Number	Name	Start	Brief Description	Elapsed Days	Phase	Last Activity	Primary B...	Last Actor
<input type="checkbox"/> CORP-938140	Admin jefferson-uat	Sep 21, 2023 10:16 AM	Business User Training #2	13	Contract Created	Sep 21, 2023 10:30 AM	David Brownstein	Admin jefferson-uat
<input type="checkbox"/> COMM-208492	Stephen Demarest	Aug 15, 2023 10:20 AM	retesting supply chain and legal reassignments	50	Contract Created	Aug 15, 2023 10:56 AM		Stephen Demarest
<input type="checkbox"/> COMM-208253	Stephen Demarest	Aug 11, 2023 04:32 PM	testing reassignment back to Legal	54	With Contract Administrator	Aug 11, 2023 04:36 PM		Stephen Demarest
<input type="checkbox"/> COMM-207896	Stephen Demarest	Aug 11, 2023 10:41 AM	Deanne Widget Test	54	Contract Created	Aug 11, 2023 10:53 AM		Stephen Demarest
<input type="checkbox"/> COMM-207680	Stephen Demarest	Aug 10, 2023 10:02 AM	Test for SC Assignment	55	With Contract Administrator	Aug 11, 2023 10:13 AM		Eric Calguri
<input type="checkbox"/> COMM-207801	Stephen Demarest	Aug 11, 2023 08:01 AM	Allison test	54	With Contract Administrator	Aug 11, 2023 08:59 AM		Allison Paul

- ii. A new window opens. Select your desired field to be displayed by checking its box. Rearrange the order by dragging the selected fields up and down on the right side of window. Click **Apply Changes**.



Select Fields

Choose columns to show on the grid

ALL FIELDS

Search for a field

- Access to Protected Health Informati...
- Action
- Additional Comments
- All Participants
- App ID
- Are expenses for the project approve...
- Are you the Primary Business Contact?
- Assigned Contract Admin
- Assigned Law Reviewer
- Atom Number
- Atom Order
- Auto-Renewal Cancellation Notice (# ...
- Brief Description
- Contact Email

SHOW ON GRID

Search for a field

- LSR Number
- Name
- Start
- Brief Description
- Elapsed Days
- Phase
- Last Activity
- Primary Business Contact
- Last Actor

Group By: (none)

Column Header Text: Wrap Truncate

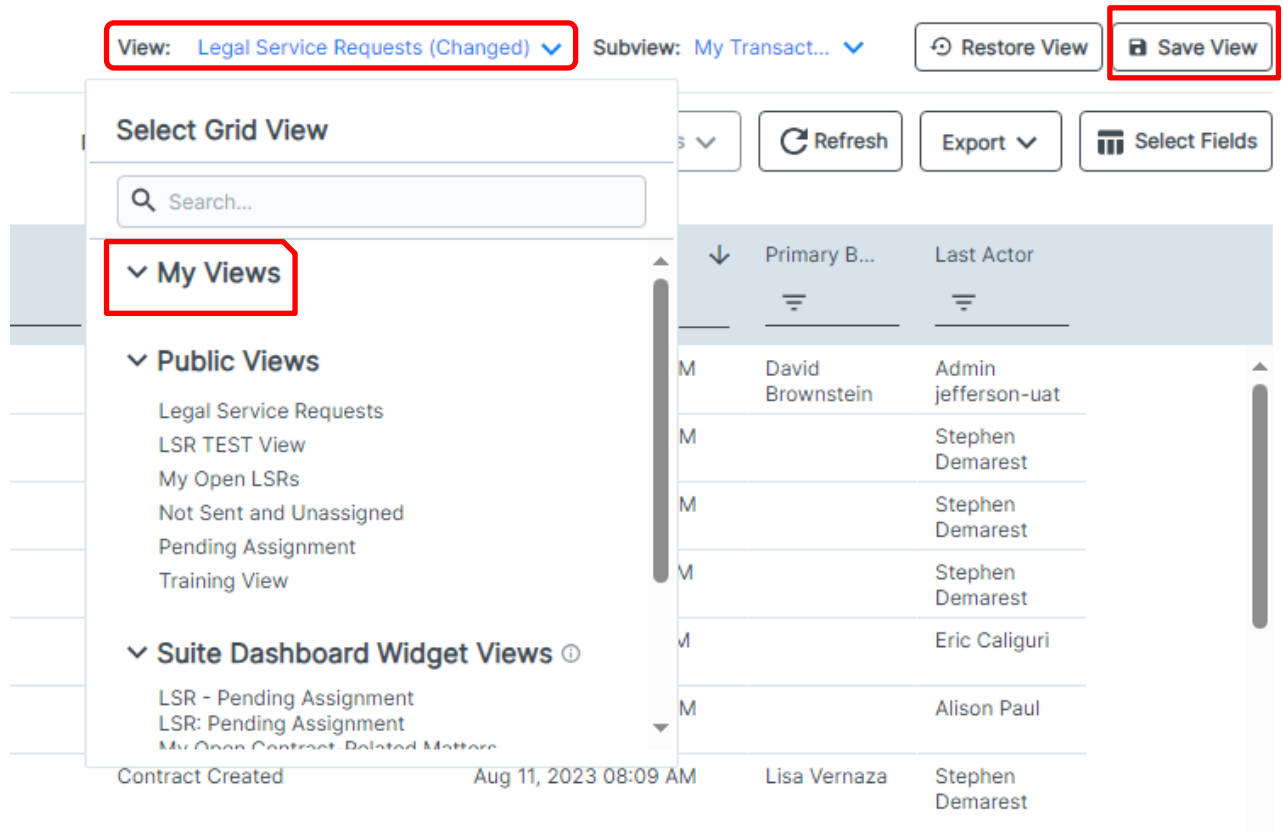
Truncate Data in Cells

Cancel Apply Changes

Use search to help you find fields

Drag up and down to re-order

- iii. Your revised Grid View will now display. You can also rearrange the columns in Grid View by clicking and dragging the column headers left and right.
- iv. Remember to save your new Grid View by clicking the **Save View** button. Your Saved View will be accessible in the **View** dropdown at the top of the page under **My Views**.

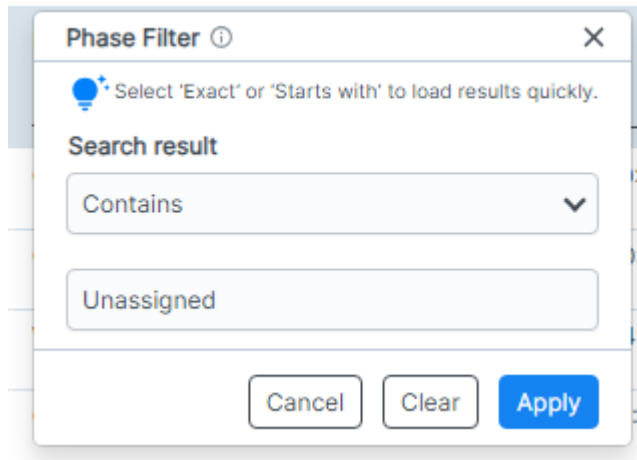
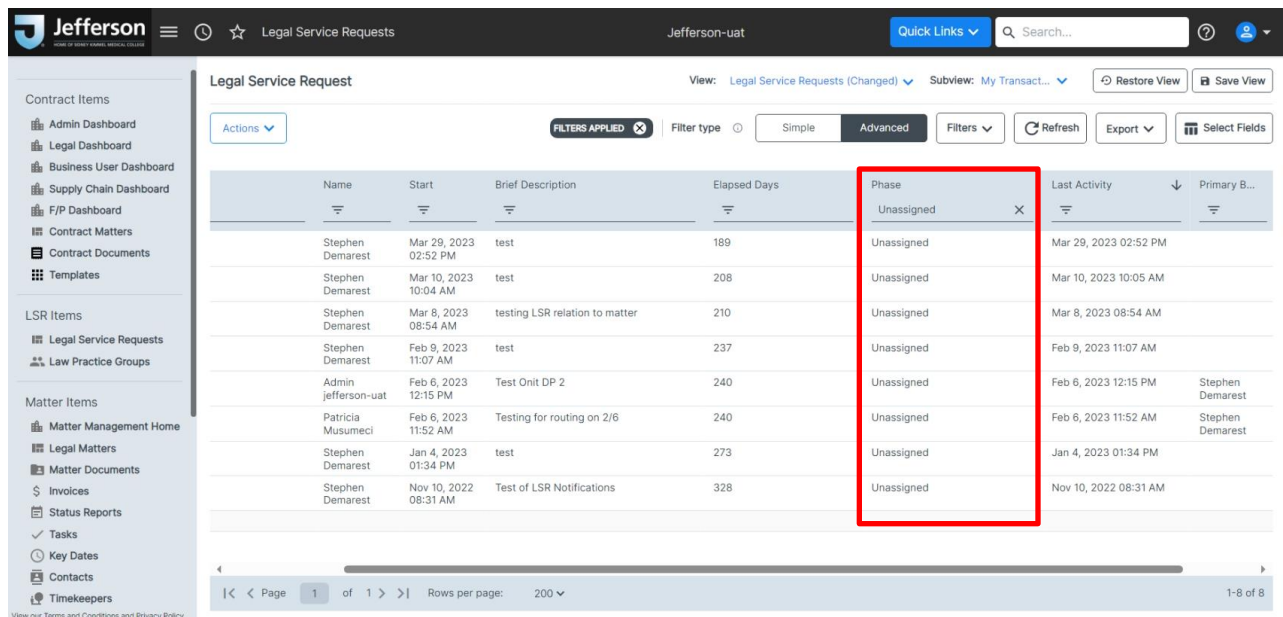


The screenshot shows the top navigation area of the application. At the top left, there is a 'View:' dropdown menu currently set to 'Legal Service Requests (Changed)'. To its right is a 'Subview:' dropdown set to 'My Transact...'. Further right are two buttons: 'Restore View' and 'Save View'. Below these is a 'Select Grid View' dropdown menu that is open, showing a search bar and three categories: 'My Views', 'Public Views', and 'Suite Dashboard Widget Views'. The 'My Views' category is highlighted with a red box. Below the dropdown, a table of data is visible with columns for 'Primary B...', 'Last Actor', and other details.

	Primary B...	Last Actor
M	David Brownstein	Admin jefferson-uat
M		Stephen Demarest
M		Stephen Demarest
M		Stephen Demarest
M		Eric Caliguri
M		Alison Paul
	Lisa Vernaza	Stephen Demarest

2. Filters

- i. You can also apply filters to Fields (Column Headers) in Grid View. The filter is accessible by clicking on the funnel (3 descending vertical lines) below the Column Header.
- ii. In the following example, the Phase Filter is being used to only display those LSR Records that are in Unassigned Phase. Once applied, only the LSRs where phase equals Unassigned appears. To remove the filter, click the X near the funnel icon.

Name	Start	Brief Description	Elapsed Days	Phase	Last Activity	Primary B...
Stephen Demarest	Mar 29, 2023 02:52 PM	test	189	Unassigned	Mar 29, 2023 02:52 PM	
Stephen Demarest	Mar 10, 2023 10:04 AM	test	208	Unassigned	Mar 10, 2023 10:05 AM	
Stephen Demarest	Mar 8, 2023 08:54 AM	testing LSR relation to matter	210	Unassigned	Mar 8, 2023 08:54 AM	
Stephen Demarest	Feb 9, 2023 11:07 AM	test	237	Unassigned	Feb 9, 2023 11:07 AM	
Admin jefferson-uat	Feb 6, 2023 12:15 PM	Test Onit DP 2	240	Unassigned	Feb 6, 2023 12:15 PM	Stephen Demarest
Patricia Musumeci	Feb 6, 2023 11:52 AM	Testing for routing on 2/6	240	Unassigned	Feb 6, 2023 11:52 AM	Stephen Demarest
Stephen Demarest	Jan 4, 2023 01:34 PM	test	273	Unassigned	Jan 4, 2023 01:34 PM	
Stephen Demarest	Nov 10, 2022 08:31 AM	Test of LSR Notifications	328	Unassigned	Nov 10, 2022 08:31 AM	

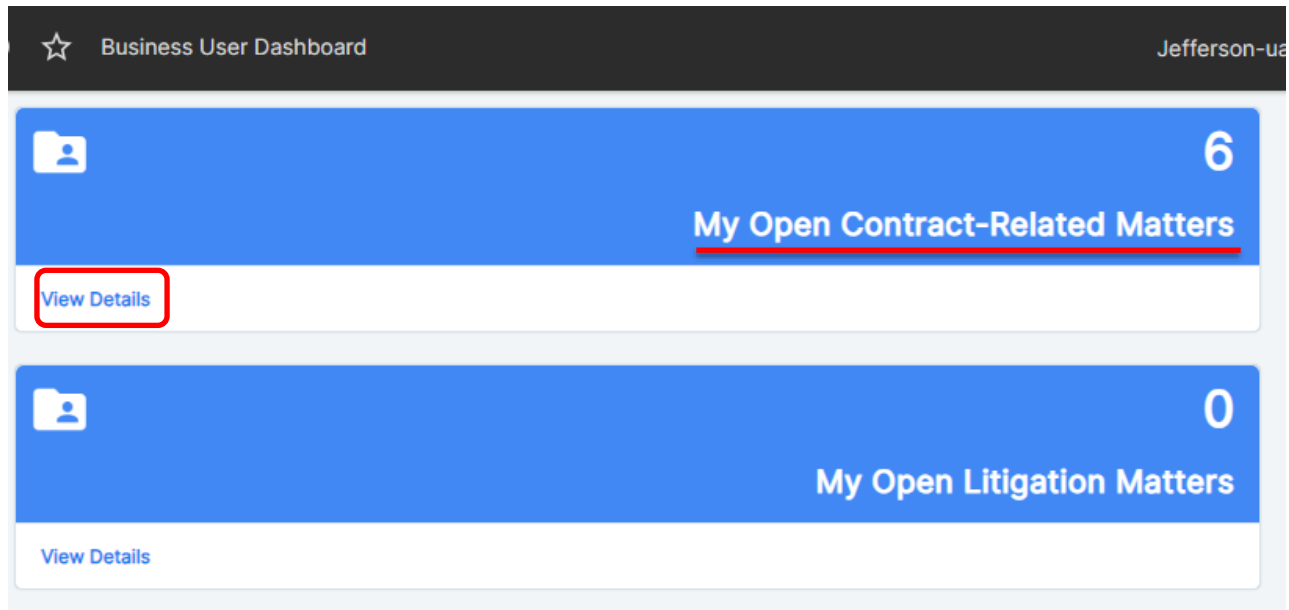
3. Sorting

- i. Columns can be sorted by ascending or descending order. Simply **click the column header** and the data will automatically sort. In the following example, by clicking the Phase column header, the data has been sorted in ascending order. To sort in descending order, click the Phase column header again.

Project Name	Matter Type	Matter Subtype	Phase	Last Action	Assigned Law Reviewer	Last Activity
COMM-69671	Commercial Issues & Contracts	General	Matter Created	Transaction Phase Change	viren.bhakta@unitedlex.com	Jul 6, 2018 08:24 AM
RESE-69718	Research	General	Matter Created	Closed Project	viren.bhakta@unitedlex.com	Jul 6, 2018 11:21 AM
COMM-69720	Commercial Issues & Contracts	Facilities Issues	Matter Created	Closed Project	viren.bhakta@unitedlex.com	Jul 6, 2018 11:35 AM
LITI-69725	Litigation	Billing/Reimbursement	Matter Created	Closed Project	viren.bhakta@unitedlex.com	Jul 6, 2018 11:49 AM
CORP-69765	Corporate	Bond Issues	Matter Created	Closed Project	viren.bhakta@unitedlex.com	Jul 16, 2018 09:59 AM
CORP-69766	Corporate	Committee Participation	Matter Created	Closed Project	viren.bhakta@unitedlex.com	Jul 9, 2018 11:12 AM
COMM-69775	Commercial Issues & Contracts	Facilities Issues	Matter Created	Closed Project	viren.bhakta@unitedlex.com	Jul 9, 2018 02:54 PM
COMM-69195	Commercial Issues & Contracts	Gift Agreements	Resolved Without Matter Creation	Closed Project	viren.bhakta@unitedlex.com	Jul 6, 2018 08:17 AM
REGU-69674	Regulatory	Facility Licensure and Accreditation	Resolved Without Matter Creation	Transaction Phase Change		Jul 5, 2018 04:08 PM
LABO-69719	Labor & Employment	Faculty & Professional Contracts	Resolved Without Matter Creation	Closed Project	viren.bhakta@unitedlex.com	Jul 6, 2018 11:38 AM
TRAN-69763	Transactions	Physician Practice Transactions	Unassigned	Email Sent		Jul 9, 2018 10:41 AM
EDUC-69764	Legal Department Administration	Personnel	Unassigned	Updated Project		Jul 9, 2018 11:36 AM
COMM-69965	Commercial Issues & Contracts	Construction Contracts	Unassigned	Email Sent		Jul 16, 2018 03:14 PM
COMM-69967	Commercial Issues & Contracts	Forms	Unassigned	Email Sent		Jul 16, 2018 03:17 PM

G. View My Contract Matters

If your Contract-Related LSR becomes a Contract Matter, you can view your open Contract Matters by navigating to your **Business User Dashboard** and clicking the **View Details** link within your **My Open Contract-Related Matters** widget.



The screenshot shows the 'Business User Dashboard' interface. At the top, there is a dark navigation bar with a star icon, the text 'Business User Dashboard', and a user identifier 'Jefferson-ua'. Below this, there are two main widgets. The first widget, titled 'My Open Contract-Related Matters', has a blue header with a folder icon and a count of '6'. The text 'My Open Contract-Related Matters' is underlined in red. Below the header is a white box containing a 'View Details' link, which is highlighted with a red rectangular border. The second widget, titled 'My Open Litigation Matters', has a blue header with a folder icon and a count of '0'. Below its header is a white box containing a 'View Details' link.