Legal Service Request Quick Reference Guide
For Onit CLM Business Users

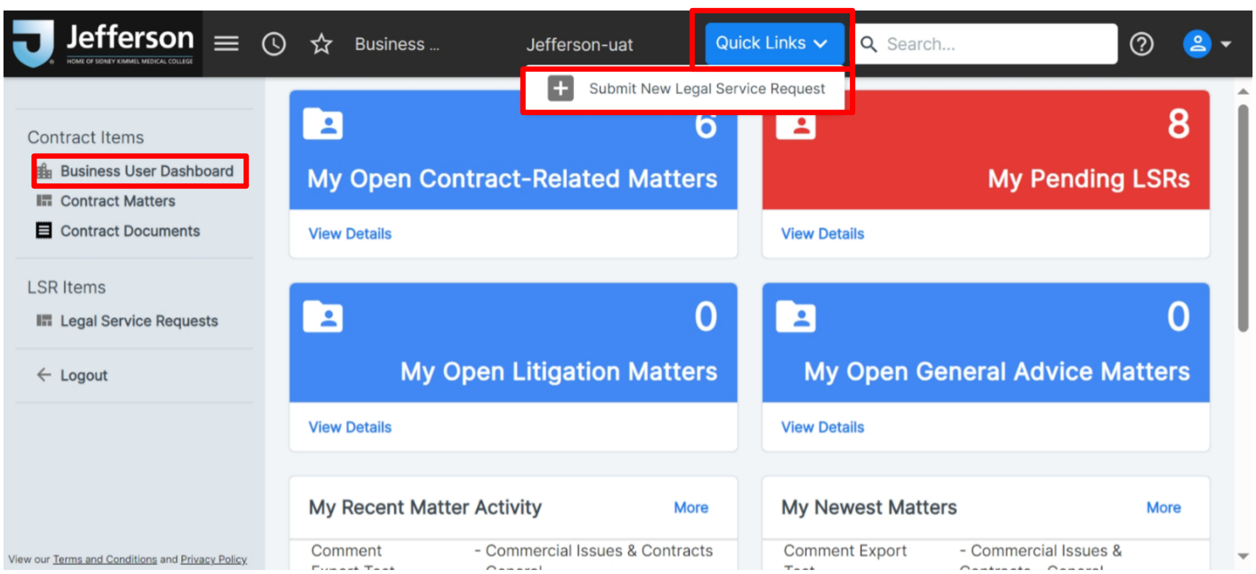
Contents

Last Revised: 10/09/2023

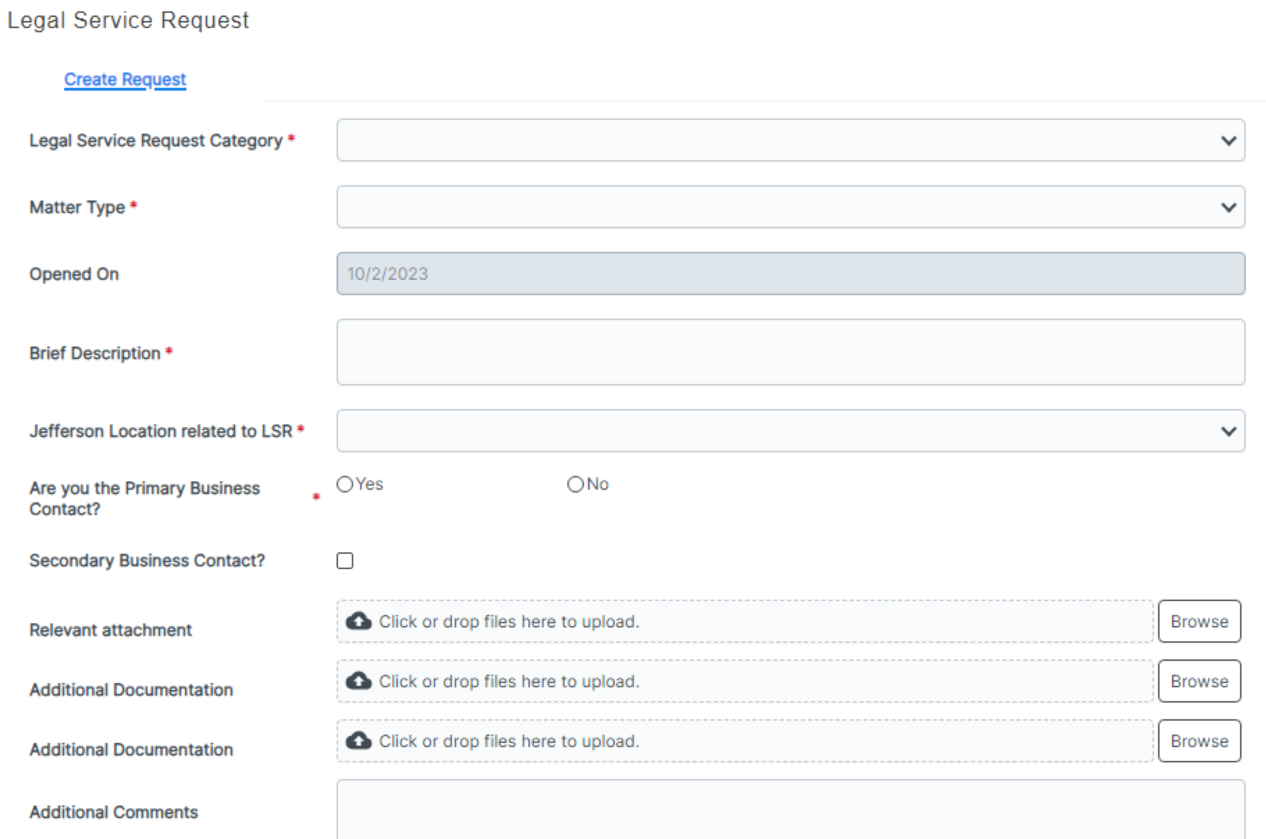
A. Submit New Legal Service Requests

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.

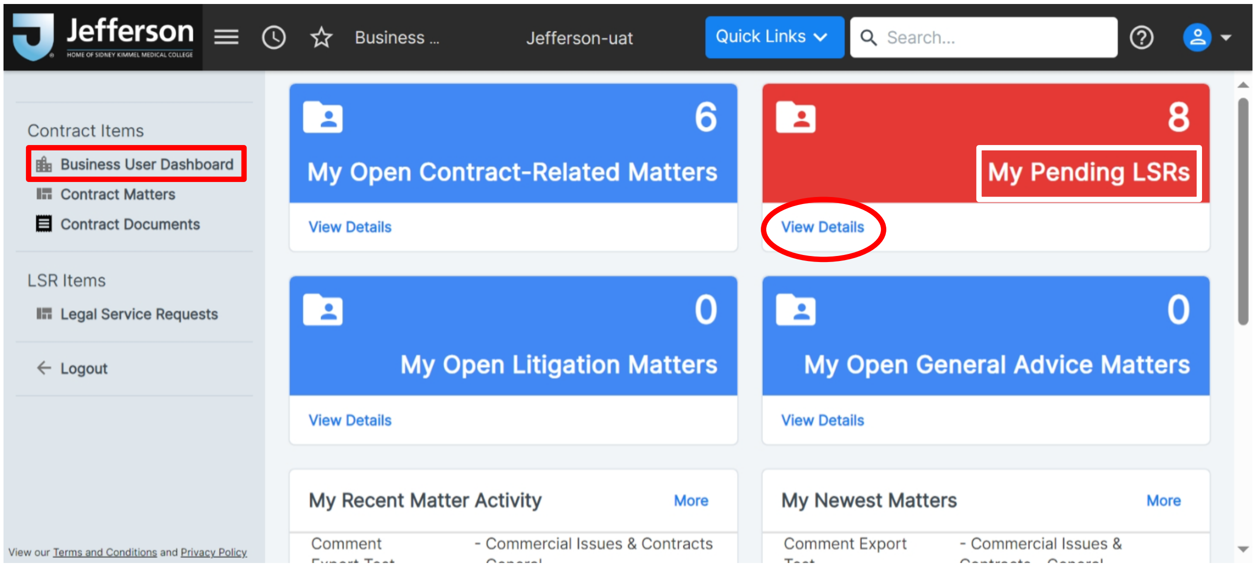


a. ***Legal Service Request Category***: Select Contract-Related in dropdown.
b. ***Matter Type and Matter Subtype***: Choose the appropriate Matter Type and Matter Subtype (see separate guide for Matter Type/Subtype relationships). **IMPORTANT NOTE**: only LSRs with **Matter Subtype: Supply Chain** 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.

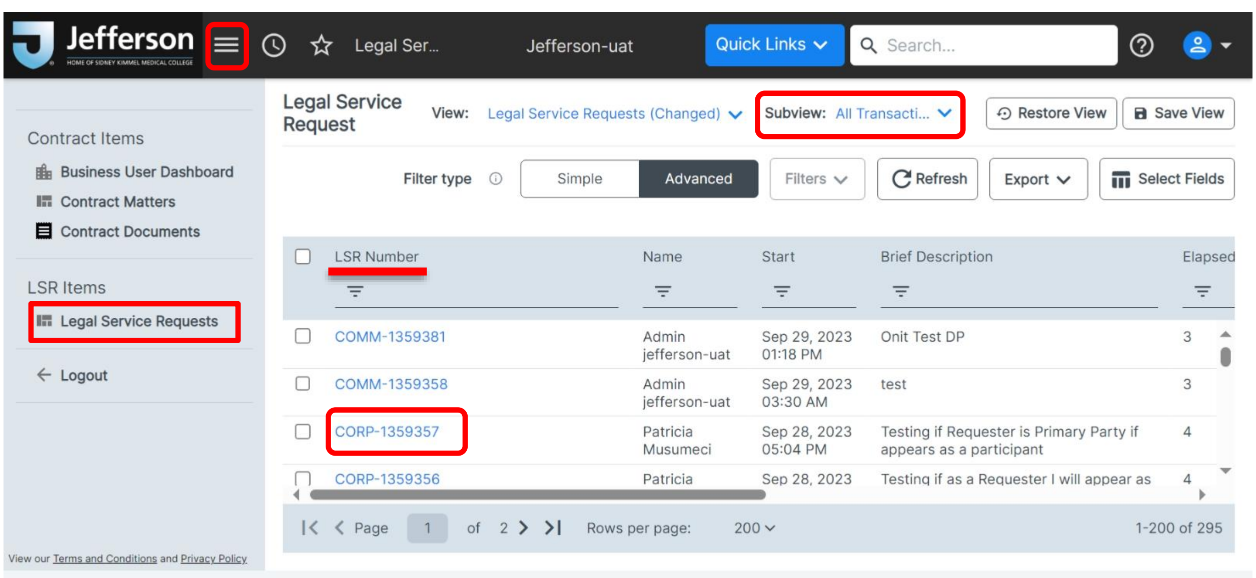
4. Click **Submit**. Upon submission, a system generated notification will be sent to your inbox informing you the request has been submitted to Legal or Supply Chain for assignment.

B. View Existing Legal Service Requests

1. 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.



2. 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.

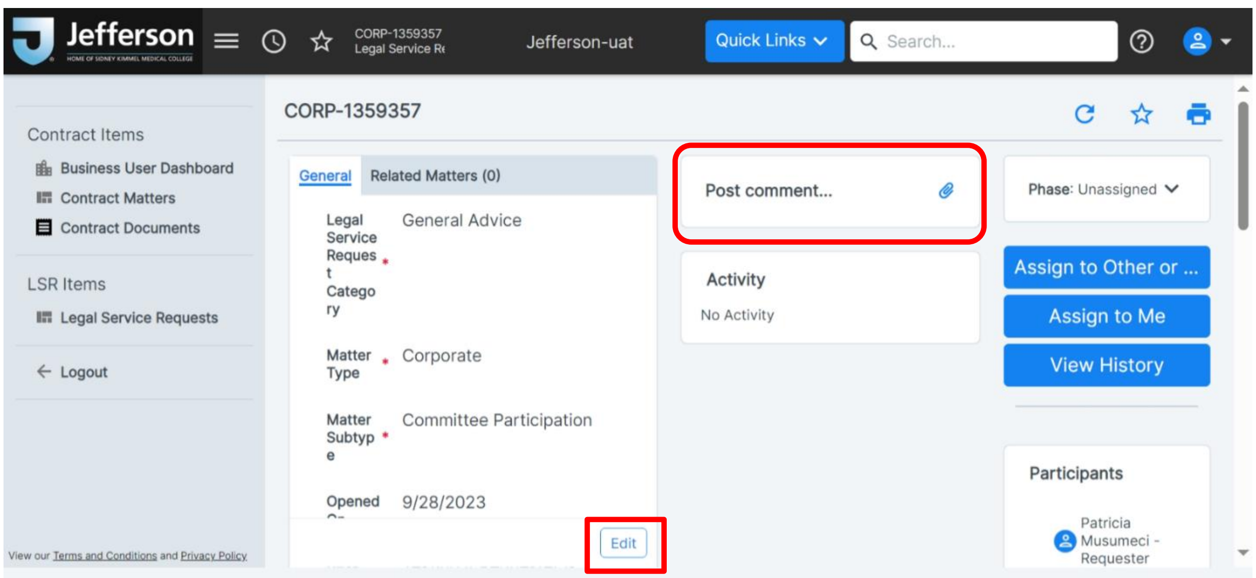


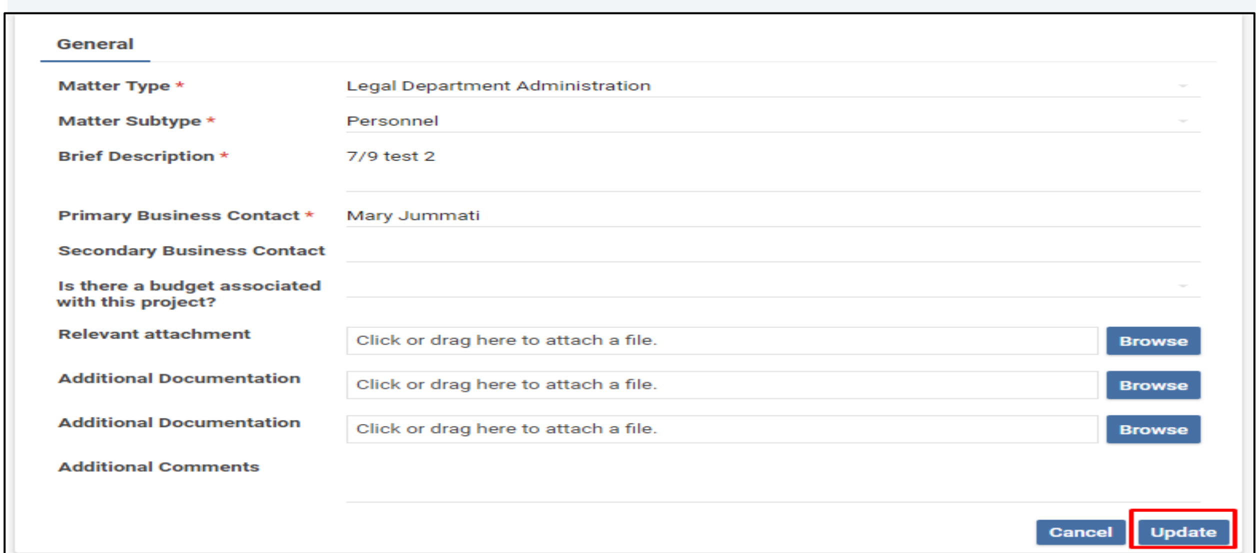
C. Edit Legal Service Requests

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.

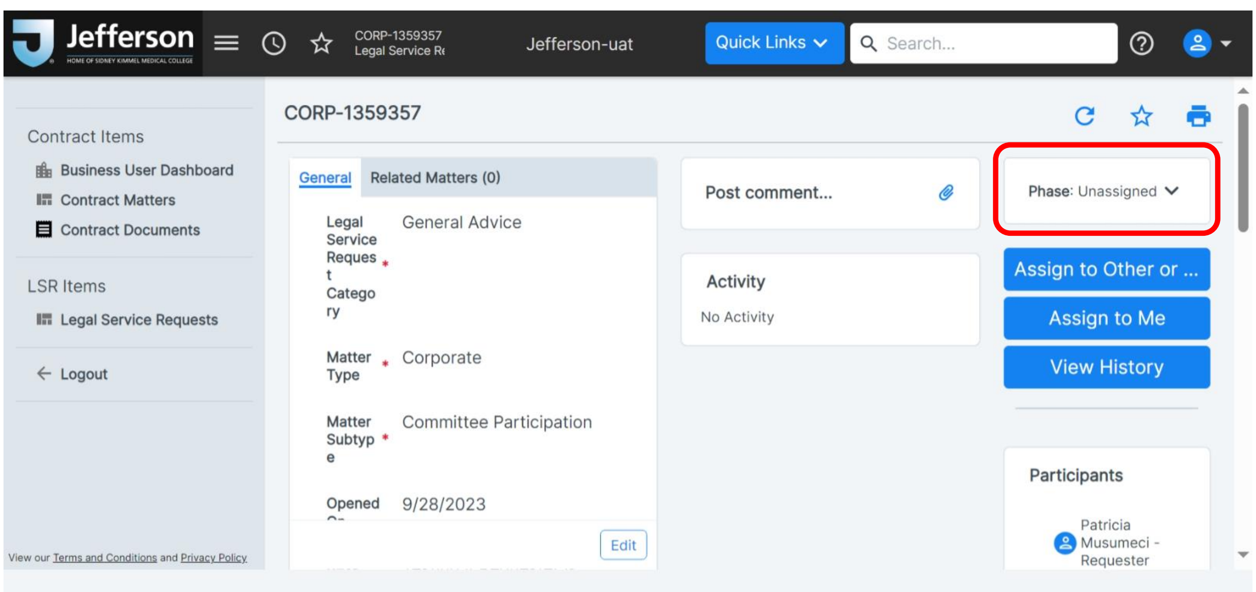




D. Phases of a Legal Service Request

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.

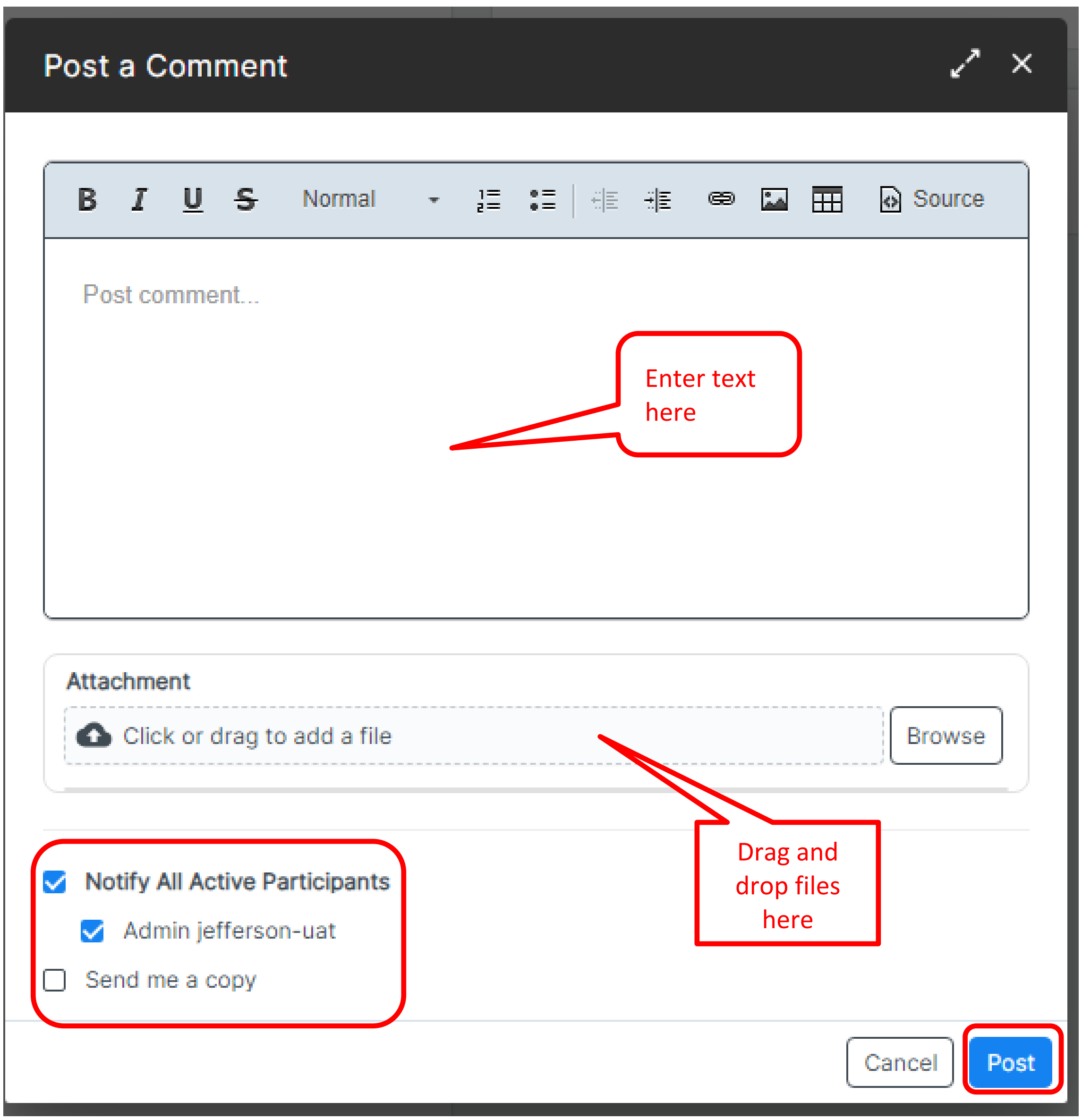
1. **Unassigned**: your LSR has been submitted and is pending assignment by Legal or Supply Chain.
2. **With Attorney or With Contract Administrator**: your LSR has been assigned to an attorney or paralegal (Legal) or Contract Administrator (Supply Chain) and is currently in review.
3. **Awaiting Input 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.



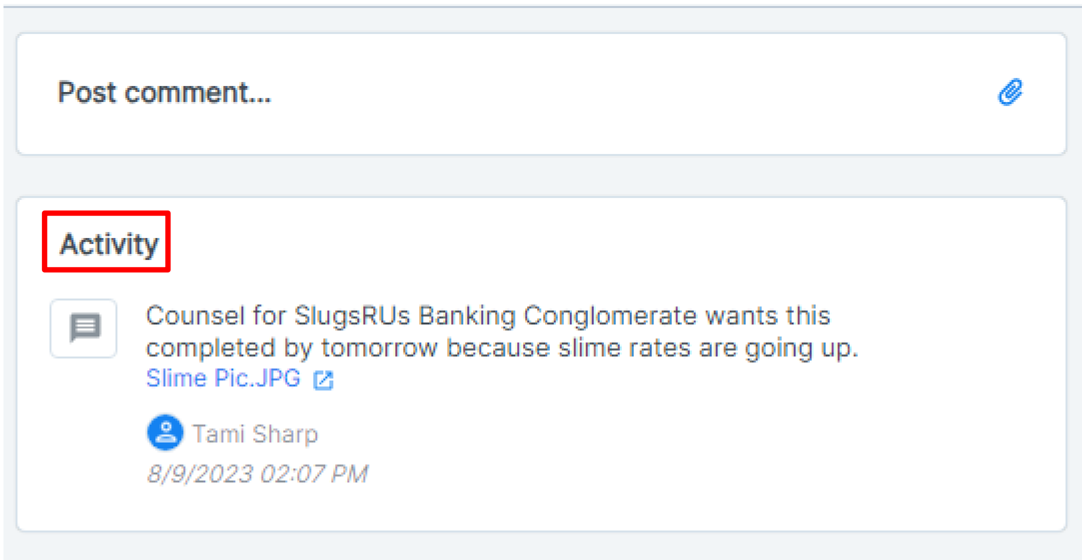
E. Collaboration

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.



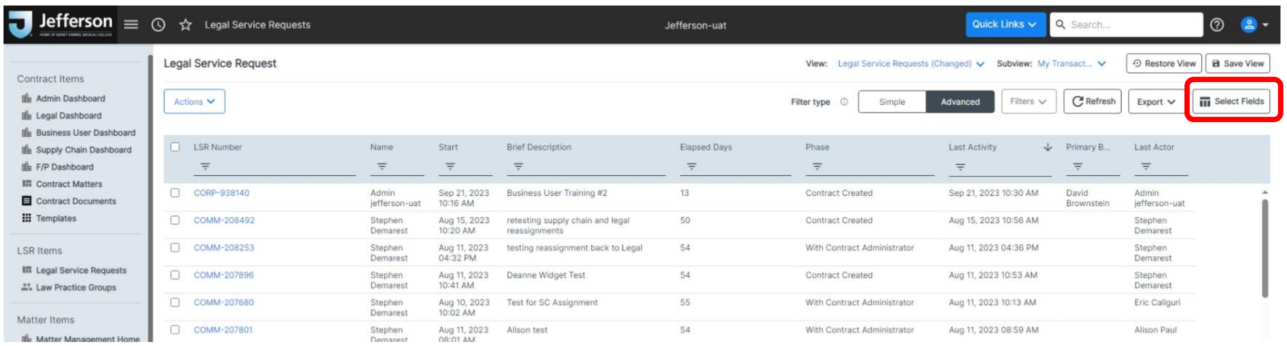
5. Your new comments and attachments are recorded in the **Activity Panel** of the LSR Record. All comments and attachments are automatically exported into the Activity Panel of any Contract Matter subsequently created.



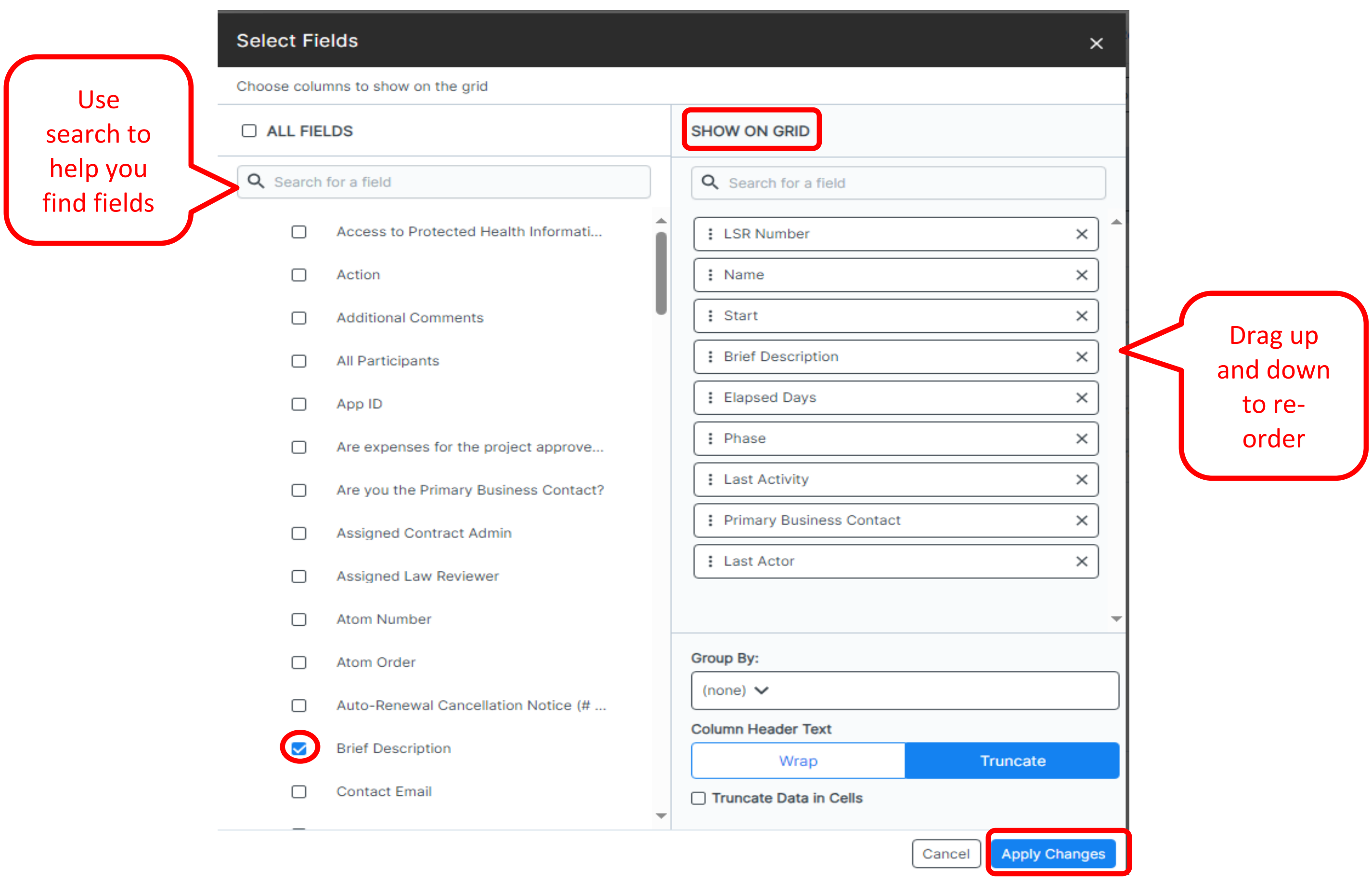
F. Quick Tips

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.

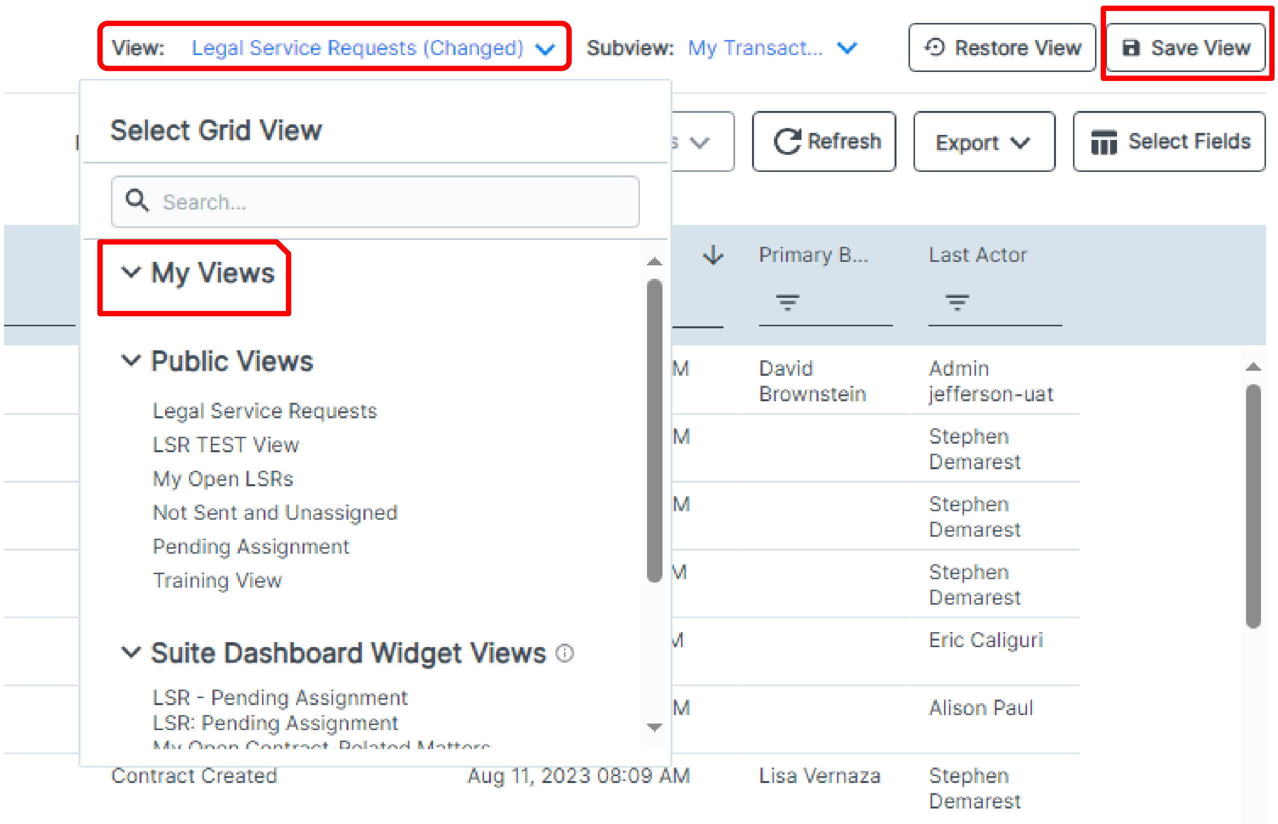


ii. A new window opens. Select your desired field to be displayed by checking its box. Rearrange the order by dragging the selected fields up and down on the right side of window. Click **Apply Changes**.



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.

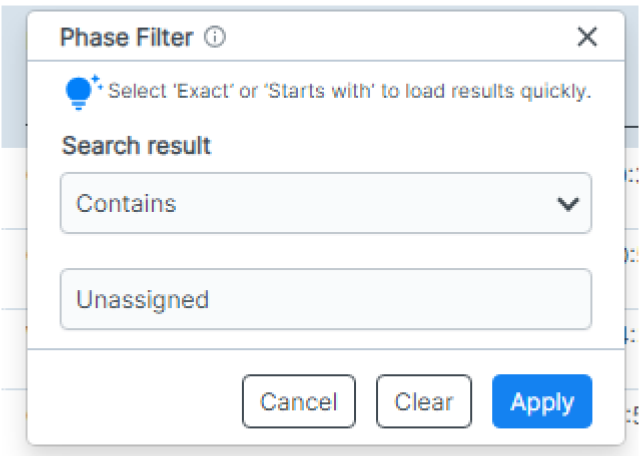
iv. Remember to save your new Grid View by clicking the **Save View** button. Your Saved View will be accessible in the **View** dropdown at the top of the page under **My Views**.

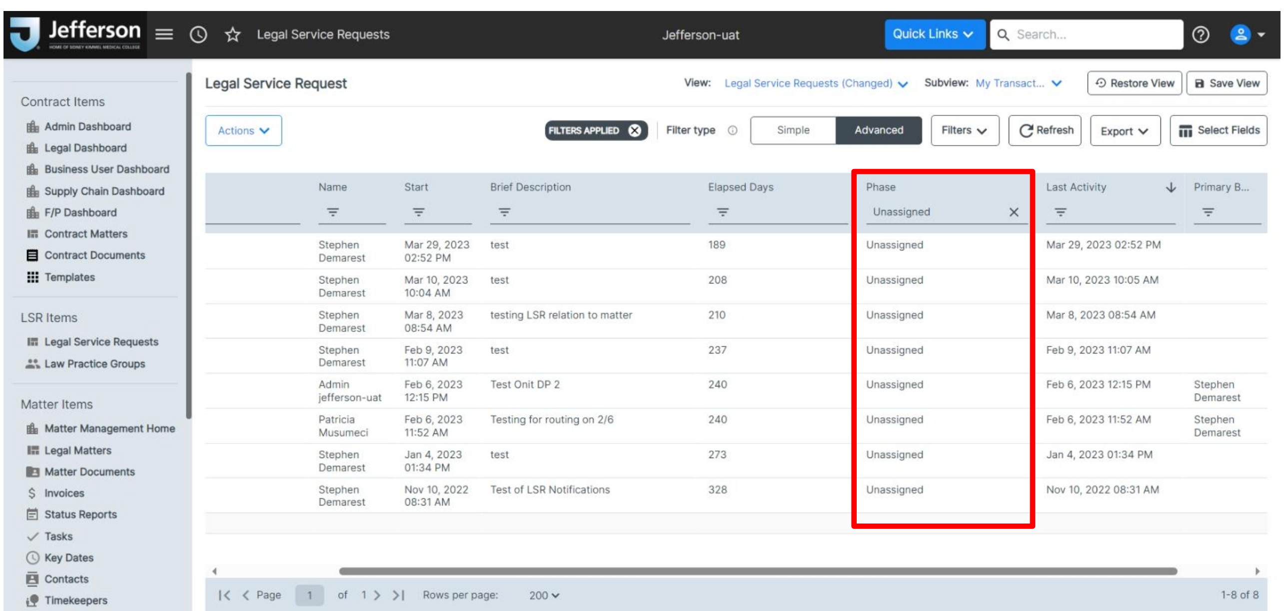


2. Filters

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.





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.