



V 0.4 - 30 August 2019

# **Whole of Australian Government Legal Services Panel**

## **Agency Portal User Guide**



## Document Control Information

### Document details

<b>Title</b>	Agency User Guide
<b>TRIM container</b>	18/4324-6
<b>TRIM reference</b>	19#305624DOC
<b>Client</b>	

### Revision History

Version	Date	Author	Comments
0.1	June 2019	Nic W-J.	Initial Draft
0.2	August 2019	Shah A.	Document was updated with screen shots
0.2	August 2019	Himmat S.	More updates to the document
0.3	August 2019	Nic W-J.	Updated with up to date information and screen shots.
0.4	August 2019	Sue M	Update with troubleshooting

### Related Documents

Document Title	TRIM Reference



## Table of Contents

Whole of Australian Government Legal Services Panel.....	1
Agency Portal User Guide .....	1
Document Control Information .....	2
Document details .....	2
Revision History .....	2
Related Documents.....	2
Introduction .....	4
Access to the Legal Services Panel Portal .....	5
User types .....	5
Initial Login.....	5
Two Step Verification.....	6
Accept the Terms of Service and Confidentiality Obligation .....	6
Forgotten Password.....	7
Method 1.....	7
Method 2.....	7
Administrators - User Management .....	7
Standard Agency users.....	9
LSP Search .....	9
Value Add Services Search .....	9
Viewing a Legal Services Provider Profile .....	10
Viewing your Agency Profile .....	11
Frequently Asked Questions .....	11
Contact Us.....	11
Panel Documentation .....	11



## Introduction

This guide is to support users of the Legal Services Panel (LSP) Portal. The target audience for this document is Commonwealth Agencies and their staff who will be accessing the Portal and this guide aims to provide information on how to use the Portal.

The whole of Australian Government legal services panel (the Panel) has been established by a competitive value for money process following an open approach to market. The Panel is managed by the Attorney General's Department and was established on 15 August 2019. The Panel is intended to better leverage the Commonwealth's purchasing power and improve efficiency in the Commonwealth's engagement with external legal services providers.

The Panel is mandatory for non-corporate Commonwealth entities subject to some flexibility mechanisms. Corporate Commonwealth entities or Commonwealth companies may choose to use the panel arrangements but must opt-in by signing a Deed of Participation.

Information about the panels for the specialised streams of Competition and Consumer law and Tax Technical Law, can be obtained by referring to websites managed by the [Australian Competition and Consumer Commission](#) and the [Australian Taxation Office](#).



## Access to the Legal Services Panel Portal

### User types

There are two types of users that can access the portal on behalf of an Agency:

- Standard user
- Administrator

A standard user will be able to:

- Search for Legal Services Providers
- Search for Value Add Services
- View general and Agency Frequently Asked Questions
- Access panel documentation
- View the Agency profile
- View other Agency staff members registered on the portal
- Change password

In addition to a standard user's access, an Administrator will be able to:

- Add users
- Modify a user's email address
- Reset a user's password
- Deactivate a user's account

### Initial Login

Users will be sent a link to their nominated email address to 'reset password'.

1. Click on the link and you will be taken to the 'reset password' screen on the Portal.
2. Enter your nominated email address, using the same email address that the 'reset password' link was sent to.
3. Enter a password, adhering to the following rules:
  - a. Must be a minimum of 10 characters long
  - b. Must include at least one numeric character
  - c. Must have one upper and one lower case alphabetical character, and
  - d. Must have one special character (i.e. \$ ! # @)
  - e. Please note for future password changes, it must not be the same password as your previous eight passwords
4. Once a password has been successfully reset, you will be taken back to the login screen.
5. To log in to your account, enter your email and new password.



### **Troubleshooting**

A user may receive an error message "Password reset link invalid" when attempting to set/reset their password if more than 24 hours has elapsed since the link was sent to the user's email address.

**Solution:** The user is advised to visit the Legal Services Panel Portal login page at <https://legalservicespanel.gov.au> click 'Log in' in the top right hand corner and click the "Forgot your password?" link.

When asked, the user must enter their Legal Services Panel Portal login email address. An automated email with a password reset link will be sent to the user's email address.

The user should follow the instructions in the email to reset their password. Users should always use a different password to the previous ones they may have used previously for the Legal Services Panel Portal.

### **Two Step Verification**

6. You will then be presented with the login code screen. The login code will have been sent to your nominated email address.
7. Please enter the login code (this will be six digits, for example: 123456) and select the 'Log in' button.

### **Accept the Terms of Service and Confidentiality Obligation**

1. Upon first logging in, you must read and accept the Terms of Service and Confidentiality Obligation. Document links have been provided for the following:
  - Head Agreement
  - Panel Guidance Material; and
  - Deed of Participation

**Please note**, for subsequent logins, you will not be required to select the 'Terms of Service' checkbox.



Once you have read and accepted (by selecting the checkbox) the Terms of Service and Confidentiality Obligation, select continue to proceed.

### In order to proceed, you must read and accept the following:

#### Terms of Service

Agencies and Legal Services Providers must be familiar with the Panel Head Agreement ([Head Agreement](#)) and the [Panel Guidance Material](#). Agencies that have opted-in to use the Panel must also be familiar with the Deed of Participation in the Whole of Australian Government Legal Services Panel Arrangement (Deed of Participation).

By ticking this box you acknowledge that you have read and agree to comply with the [Head Agreement](#), the [Panel Guidance Material](#) and the [Deed of Participation](#) (if relevant).

#### Confidentiality Obligation

The Legal Services Panel Portal contains Confidential Information about Legal Services Providers that is commercially sensitive, including pricing and performance information. Confidential Information must be used or disclosed in accordance with the confidentiality provisions in Clause 22 of the [Head Agreement](#).

By ticking this box you acknowledge that you have read clause 22 of the [Head Agreement](#) and agree to the confidentiality obligations.



## Forgotten Password

There are two methods to reset your password:

### Method 1

1. Go to the Legal Services Panel Portal log in screen, and select 'Forgot your password?'
2. Click on the link and you will be taken to the 'Forgot your password?' screen on the Portal.
3. Enter your nominated email address and a password recovery email link will be sent to your nominated email address.
4. Please follow the steps in the email to reset your password.

### Method 2

1. Approach one of your Agency's Legal Services Panel Administrator, and they can reset your password.
2. A password recovery email link will be sent to your nominated email address.
3. Please follow the steps in the email to reset your password.

## Administrators - User Management

As an Agency administrator in the Portal you have access to the User Management page. You will be able to add additional Agency staff members who require access to the portal. The steps are as follows:

1. Select the 'Dashboard' menu tab.
2. Select 'User Management'.
3. Select 'Create User'.



4. On the 'Create User' page, enter the name and email address of the new user.
5. A welcome email with a password recovery link will be sent to their email address. A user will have 24 hours to reset their password. After this time, the Administrator will need to reset the user's password to generate a new password recovery link.

The newly created user's account will be locked out until they reset their password. You can view the status of the account in the user management page. The account will display a yellow box with the words 'Locked out' until the user logs in for the first time.

Please note, accounts are created as Standard Users. Only a member of the OLSC Panel Administration team can upgrade an account type from a Standard User to an Administrator user for your Agency.

In addition to the above, if you require an Administrator account to be created from the outset, please contact [lspanel@ag.gov.au](mailto:lspanel@ag.gov.au)

Additional functions on the user management page include:

#### Email

- You can select a user's email address, which will launch your default email client.

#### Reset Password

- Selecting this option will present you with a confirmation page. If you wish to proceed, select 'Reset User Password'.
- This action will lock out the user account, which will prevent them from logging in until they set a new password. The user will receive an email to reset their password.
- The status of the user will be shown as 'Locked out' in the User Management page.

#### Edit User

- This will allow you to update the name or email address of the user

#### Deactivate

- You will have the ability to deactivate users that no longer need access to the portal by selecting the 'Deactivate' link. You will be presented with a confirmation page, and if you wish to proceed, select the 'Deactivate' button
- This action will lock out the user account, which will prevent them from logging in until you reactivate their account
- The status of the user will be shown as 'Deactivated User' in the User Management page

#### Reactivate

- This action will reactivate a deactivated user's account. You will be presented with a confirmation page, and if you wish to proceed, select the 'Reactivate User' button.
- The user will need to reset their password to unlock their account before they are able to log back in
- The status of the user will be shown as 'Locked out' in the User Management page until they reset their password.



## Standard Agency users

As a standard Agency user, you have access to the following:

### LSP Search

Select the 'Search' menu tab, which will take you to the search page. By default, you will be taken to the 'LSP Search' page, where all the Legal Service Providers (LSPs) will be displayed, and the Senior Associate level will be pre-selected.

Initially the results are condensed, and you will have a view of the Legal Services Provider name. You can select 'Expand All' to get an expanded view of what each Legal Services Provider is approved for in relation to the legal services panel.

Selecting 'Collapse All' will return you to the condensed view.

On this page, the following search types can be performed:

1. Type in a search term(s) in the free text search field, and this will filter the results based on your entry
2. You can narrow your search by selecting one or more individual criteria under the following headings:
  - Area of Law
  - Practice Area
  - Location
  - Rate / Levels

Your results will show any Legal Services Provider that match **all** the selected criteria.

You may also export the search results by selecting the 'Export to Excel' link. You must have a compatible application to open the file.

You can view an individual Legal Services Provider profile by either selecting 'View Profile' or clicking on their name.

### Value Add Services Search

Select the 'Value Add Services Search' link on the Search page to view the Value Add Services provided by Legal Services Providers. The initial view of the results are not filtered, and you have a view of all services.

You can sort the results by Legal Services Provider or Service. Alternatively, you can type in a search term in the search field to filter for results that contain your search term.



## Viewing a Legal Services Provider Profile

As mentioned previously, on the LSP search page, you are able to select a Legal Services Provider to view more in-depth information about them. There are four menu tabs you can select relating to their profile:

### Summary

You are able to view the firms contact details and their nominated representatives

### Areas of Law

You can view the Practice Areas and locations the firm is approved to provide services for. Also listed are the Key Personnel for each Area of Law the firm has nominated. Selecting a Key Personnel's name will take you to that individual's profile page.

### Rates

You can view the maximum rates that the legal services provider can charge for their approved Practice Area. If a rate isn't listed for a Practice Area, Level or Rate type, this means they have not been approved to provide services in that particular area.

### Value Add Services

Any Value Add Services the Legal Services Provider has been approved to offer will be listed on this page. Selecting the individual Value Add Service will allow you to view further details on it.



### **Viewing your Agency Profile**

This page will show you your Agency's profile. If details need to be updated, please contact [lspanel@ag.gov.au](mailto:lspanel@ag.gov.au).

### **Frequently Asked Questions**

If you have any general questions about the Panel or Portal, visit the FAQs page to see if your question can be answered. When you are logged in to the Portal, you can view Agency specific FAQs along with the General FAQs.

### **Contact Us**

If you require further assistance, please contact the Office of Legal Services Coordination (OLSC) via [LSPanel@ag.gov.au](mailto:LSPanel@ag.gov.au).

### **Panel Documentation**

The following panel documentation is available from the Home or the Dashboard page of the Portal:

- Panel Guidance Material
- Panel Areas of Law and Practice Areas
- Matrix of Legal Services Providers
- Head Agreement Template
- Request for Quote Template
- Order Template
- Factsheet: Panel Fee