

Adding a Co-Representative to a Bid Protest Case

Each party to a case can have **up to four representatives** who can file or retrieve case-related documents in EPDS. The *Parties* screen shows all the representatives associated with a bid protest case. **Note:** Please be advised that all representatives in a case must have an EPDS user account in order to access the case.

To add a co-representative:

1. Sign into EPDS. The *Dashboard* appears.

	Dashboard						🍘 Dashboa	rd > Active Cases
🏠 Active Cases								
File New Protest	Show 25 • entries				Filter Records : Show / hide columns			
	B-Number	Protester 👫	Filing Date 🚛	Agency 🕴	Due Date 👫	EPDS Cntrl # 1	Case Type 🛛 🕽 1	Case Status 🎝
	B-412740.1	HTG	Mar 22 2016 15:22:25 EDT	Department of Agriculture/Agriculture Research Service	06/30/2016	A-MQH1I	PROTEST	CLOSED
	B-412734.1	XYZ Test, LLC	Mar 30 2016 08:40:14 EDT	Administrative Conference of the United States	07/08/2016	A-BC6E8	PROTEST	OPEN
	B-123499.2	HTG	Apr 04 2016 18:21:18 EDT	Department of Agriculture/Agriculture Research Service	07/13/2016	A-MQH1I.2	SUPPLEMENTAL	OPEN

- From the *Dashboard*, locate the case to which you wish to add a representative. Note: You can use the Filter Records field to assist with performing a search.
- 3. Once the case is located, click its **B-Number** to open its *Case Docket Sheet*.

	Case Docket Sheet				
Active Cases					
Submit New Decuments	Case Type	SUPPLEMENTAL	GAO Attorney Name		
	Company Status	LARGE	GAO Attorney Email		
📽 Parties 🔶	Protester	HTG	GAO Attorney Phone Number		
Email Preferences	B-Number	B-123498.2	Days Remaining		
	Agency	Department of Agriculture/Agriculture Research	Case Status		
		Service	Protective Order Issued?		
	Intervenor(s)	INTERVENOR COMP4			
	Solicitation Number	unknown			
	Consolidated Protests				



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4. On the *Case Docket Sheet*, click the **Parties** tab in the Navigation Pane located at the left. The *Parties* screen appears.

Party	Information
PROTESTER (HTG) 56 Nevada Fort Collins Colorado 80526 United States	Primary Representative
	Vendor2 EPDS 1(111) 111-1111 epdsvendor2@gmail.com Vendor2 Firm Fort Collins Colorado 80525 United States
INTERVENOR (Intervenor Comp4) 56 Nevada Fort Collins, Colorado,	Primary Representative
80526 United States	Joe Smith 1(111) 111-1112 epdsvendor4@gmail.com Vendor4 Firm
	Fort Collins Colorado 80525 United States
	+ Add 2nd Rep.

5. In the *Parties* screen, click the **+ Add 2nd Rep** button in the Primary Representative section. The *Add Secondary Representatives* dialog box appears.

Add Secondary Representatives	Ø
Enter Representative Email Address	
	Send Invite Cancel

6. Enter the email address of the co-representative you would like to invite to join the case, and then click the **Send Invite** button.

Note: In order to invite a co-representative to join a case, he or she must have an EPDS user account. If they have an EPDS user account, then the system will automatically send an email to invite them to join the case. Upon signing into EPDS, the invite also will be prompted to indicate whether they would like to join the case.



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fou have been invited to jo	sin	
Case #	Protester	Do you accept this invitation

If the invitation to join the case is <u>accepted</u>, then the co-representative is granted access to the case and their information appears in the **Secondary Representative** section on the *Parties* screen

	Fort Collins Colorado 80525 United States	
INTERVENOR (Intervenor Comp4) 56 Nevada Fort Collins, Colorado,	Primary Representative	Secondary Representative
80526 United States	Joe Smith 1(111) 111-1112 epdsvendor4@gmail.com Vendor4 Firm	(970) © USDA
	Fort Collins Colorado 80525 United States	Fort Collins Colorado 80526 United States
	+ Add 2nd Rep.	× Delete

If the invitation to join the case is <u>declined</u>, then the person is not granted access to the case. However, for those who unintentionally declined their invitation, you can send them another invitation by repeating Steps 4 through 6.

IMPORTANT: If a person you invite to be a co-representative <u>has</u> <u>not</u> created a user account in EPDS, then an *Error* dialog box appears to alert you that an EPDS user account does not exist for that person. Click **OK** to close the dialog box. Once he or she creates an EPDS user account, you can then add them as a co-representative and invite them to join the case by repeating Steps 2 through 6.

P Error	9
There is no EPDS user account associated with that email. Please enter a different email address or check with the user you are attempting to add to see if the user has an account.	
ОК	