

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

Show 25 entries

Filter Records: Show / hide columns

B-Number	Protester	Filing Date	Agency	Due Date	EPDS Cntrl #	Case Type	Case Status
B-412740.1	HTG	Mar 22 2016 15:22:25 EDT	Department of Agriculture/Agriculture Research Service	06/30/2016	A-MQH1	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-123498.2	HTG	Apr 04 2016 18:21:18 EDT	Department of Agriculture/Agriculture Research Service	07/13/2016	A-MQH1.2	SUPPLEMENTAL	OPEN

2. 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

Case Type	SUPPLEMENTAL	GAO Attorney Name
Company Status	LARGE	GAO Attorney Email
Protester	HTG	GAO Attorney Phone Number
B-Number	B-123498.2	Days Remaining
Agency	Department of Agriculture/Agriculture Research Service	Case Status
Intervenor(s)	INTERVENOR COMP4	Protective Order Issued?
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, 80526 United States	Primary Representative 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
✖

✉ Send Invite
✖ Cancel

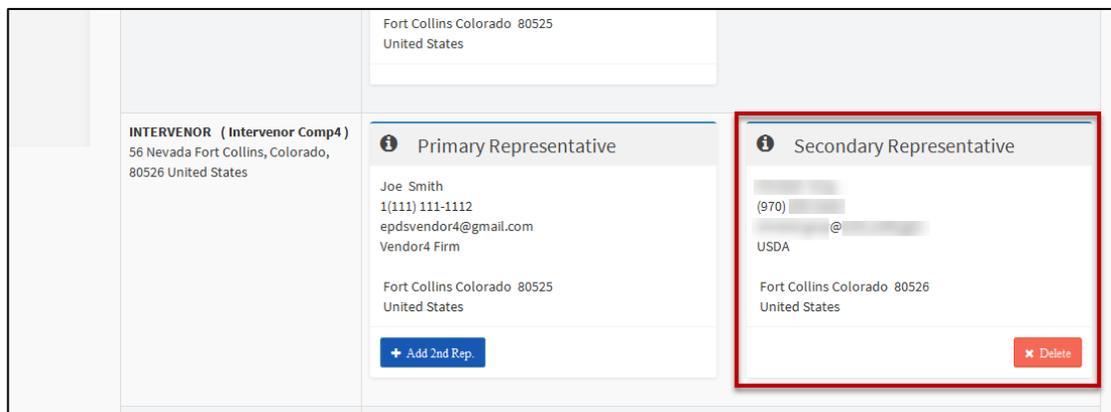
6. Enter the email address of the co-representative you would like to invite to join the case, and then click the **Send Invite** button.

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 invitee also will be prompted to indicate whether they would like to join the case.

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



If the invitation to join the case is declined, 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 has not 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.

