

# Missouri Public Service Commission

## EFIS – Submit New Case

To file a new case:

1. Log on to EFIS.
2. On the **Welcome Screen**, click the **'Filing/Submission'** menu.
3. Select the **'New Case'** link to open the **New Case Filing Screen**.



On the **New Case Filing Screen**, complete the following steps:

4. In the **'Utility Type'** field, select the applicable utility type from the drop-down list.
5. In the **'Type of Filing'** field, select the applicable type of filing from the drop-down list.
6. In the **'Type of Case'** field, select the applicable type of case from the drop-down list.
7. In the **'Filing on Behalf of'** field, select the applicable company from the drop-down list.
  - *The company list provided will contain only those companies for which you are designated as a contact. If you do not see the desired company in the list, contact the company, and ask them to add you as a contact; or notify the Data Center.*
  - *To select more than one company, press and hold the **'Ctrl'** key on your keyboard and select the next company from the drop-down list.*

The screenshot shows the 'New Case Filing' screen. At the top, there is a session timeout warning: 'SESSION TIMEOUT WARNING: Please be advised that when logged into EFIS, your EFIS session will time out (expire) after 20 minutes of inactivity. If your session times out, you will be returned to the logon screen (even if you were able to continue typing text or making entries on the screen). In addition, any data or attachments awaiting submission will be lost.' Below the warning, there are four required fields, each with a drop-down menu:

- \* **Utility Type**: Electric
- \* **Type of Filing**: Application
- \* **Type of Case**: Application for Certificate
- \* **Filing on Behalf of**: Electric Missouri, Inc-Investor(Electric) (highlighted), Doe Electric Cooperative, Inc.-Cooperative(Electric)

# Missouri Public Service Commission

## EFIS – Submit New Case

- In the 'Enter related case number(s) and/or tracking number(s)' field, input any applicable case or tracking number. Tab out of this field after entering the case number to show beside 'Selected Tracking Nos.'

**Note:** If you mistakenly entered an incorrect case or tracking number, click the 'Remove' button to remove the case number and reenter the correct case number in the 'Enter related case number(s) and/or tracking number(s)' field.

- If the type of case is a CLEC application, complete the following steps:
  - In the 'Service Area' field, select the applicable service area from the drop-down list.
  - Check the 'Type of Service Offered' box to select the type of service being offered.
- In the 'Style of Case' field, input the type of case style/case header.
- In the 'Title of Filing/Submission' field, input the title of the document, as it appears on the pleading.
- In the 'Clear and Concise Statement of Relief Requested' field, input a statement of relief, if applicable. If unknown or not applicable, input 'N/A'.
- In the 'Indicate Cite for Commission Authority' field, input the cite for commission authority. If unknown or not applicable, input N/A.
- In the 'Data Request Contact Person (Optional)' fields, input the name and e-mail address of the personal who will be responsible for responding to any Data Requests/Discovery Requests that may be issued to the filing party. This person will be the default contact for any Data Requests that are issued. If Data Requests are not anticipated for this case or if the Data Request Contact information is unknown at the time, this step may be skipped. (Please note: Only registered EFIS users will be able to respond to Data Requests.)
- Click the 'Continue' button to continue to the **Minimum Filing Requirements Screen**.

Enter related case number(s) and/or tracking number(s)  [Tab out to enter multiple case/tracking numbers.]

Selected Tracking Nos.

If type of case is CLEC application complete the following 2 fields.

\* Service Area

\* Type of Service Offered  Residential  Business  Prepaid

\* Style of Case   
(Allows only 500 characters)

\* Title of Filing/Submission   
(Allows only 500 characters)

\* Clear and Concise Statement of Relief Requested   
(Allows only 250 characters)

\* Indicate Cite for Commission Authority

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Data Request Contact Person (Optional)

First Name

Middle Initial

Last Name

E-mail Address

Sl.No.	Attachment(s)	Security Level
	<input type="button" value="Continue"/> <input type="button" value="Text"/>	

# Missouri Public Service Commission

## EFIS – Submit New Case

16. Click the 'Continue' button to continue the **Filing/Submission – Attachment(s) Screen**.



On the **Filing/Submission – Attachment(s) Screen**, complete the following steps:

17. Click the 'Browse' button to select the document(s) for attaching.

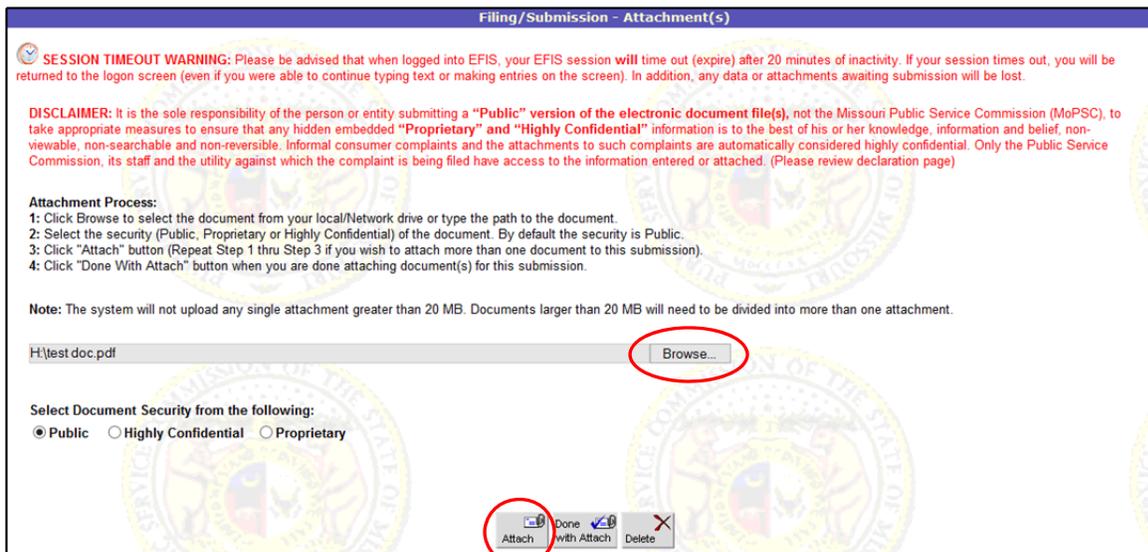
**Note:** File names and file paths cannot contain any special characters (%'&^\*#@) except an underscore or hyphen.

18. For the 'Select Document Security from the following:' option, click the applicable radio button to select the document's security level.

**Note:** It is the filer's responsibility to denote the correct security level on every document.

19. Click the 'Attach' button to attach the document.

**Note:** Multiple attachments may be made by selecting a document, its security level and then clicking the 'Attach' button.



# Missouri Public Service Commission

## EFIS – Submit New Case

20. Click the **Done with Attach** button after all the attachments have been uploaded.

**SESSION TIMEOUT WARNING:** Please be advised that when logged into EFIS, your EFIS session will time out (expire) after 20 minutes of inactivity. If your session times out, you will be returned to the logon screen (even if you were able to continue typing text or making entries on the screen). In addition, any data or attachments awaiting submission will be lost.

**DISCLAIMER:** It is the sole responsibility of the person or entity submitting a "Public" version of the electronic document file(s), not the Missouri Public Service Commission (MoPSC), to take appropriate measures to ensure that any hidden embedded "Proprietary" and "Highly Confidential" information is to the best of his or her knowledge, information and belief, non-viewable, non-searchable and non-reversible. Informal consumer complaints and the attachments to such complaints are automatically considered highly confidential. Only the Public Service Commission, its staff and the utility against which the complaint is being filed have access to the information entered or attached. (Please review declaration page)

**Attachment Process:**

- 1: Click Browse to select the document from your local/Network drive or type the path to the document.
- 2: Select the security (Public, Proprietary or Highly Confidential) of the document. By default the security is Public.
- 3: Click "Attach" button (Repeat Step 1 thru Step 3 if you wish to attach more than one document to this submission).
- 4: Click "Done With Attach" button when you are done attaching document(s) for this submission.

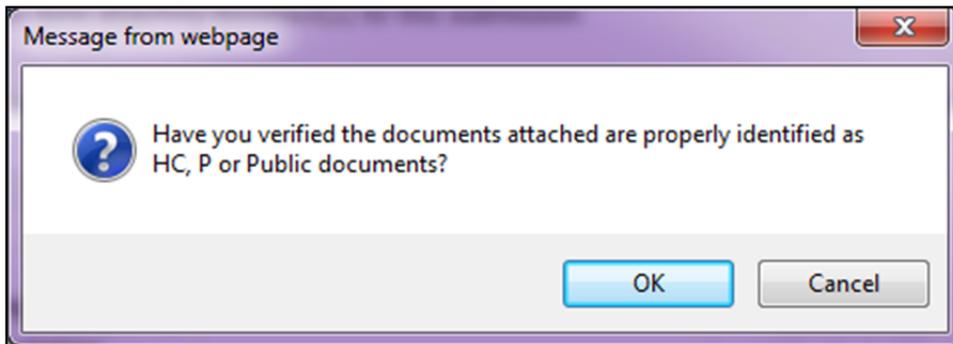
*To remove an item from the 'Attachment' list, click the 'Delete' checkbox and then click the 'Delete' button below.*

*The 'Attachment' list contains the 'Security Level' selected for each document.*

Delete	Attachments	Security Level
<input type="checkbox"/>	<a href="#">test.doc.pdf</a>	Public

Buttons: Attach, Done with Attach, Delete

21. After verifying the security levels on the attachment(s), click the **OK** button to continue to the **New Case Filing** screen.



# Missouri Public Service Commission

## EFIS – Submit New Case

Scroll to the bottom of the screen to proceed.

22. Click the **'Service List'** button to continue to the **Subscriber Input Screen** to set up the service list for the new case.

**Note:** The service list members will receive notification of all filings submitted in the case.

* Style of Case	In the Matter of the Application for Certificate of Service of Electric Missouri, Inc. <small>(Allows only 500 characters)</small>	
* Title of Filing/Submission	Application for Certificate of Service <small>(Allows only 500 characters)</small>	
* Clear and Concise Statement of Relief Requested	Application for Certificate of Service <small>(Allows only 250 characters)</small>	
* Indicate Cite for Commission Authority	4 CSR 240-28.030	
<b>Data Request Contact Person (Optional)</b>		
First Name	<input type="text"/>	
Middle Initial	<input type="text"/>	
Last Name	<input type="text"/>	
E-mail Address	<input type="text"/>	
SI.No.	Attachment(s)	Security Level
1	<a href="#">test.doc.pdf</a>	Public

On the Subscriber Input Screen, in the **Name of Party Section**, complete the following:

23. In the **'Company Name'** field, select the applicable company name from the drop-down list.
24. In the **'User Name'** field, select the applicable user name from the drop-down list.

**Note:** The drop down list will only list individuals who have been designated as a contact for the company. If the person who should be designated to receive the information is not listed, please contact the company and ask them to add that person as a contact; or notify the Data Center.

25. Click the **'Add'** button to add the user to the service list.
26. Repeat steps 23-25 until all parties have been added to the service list.

**Subscriber Input Screen**

\* Required Fields

**Name of Party**

\* Company Name: Electric Missouri, Inc.-Investor(Electric)

\* User Name: Doe John

(User ID is required to add a party to the subscriber Service List -- User ID may be obtained by completing EFIS Registration.)

Buttons: Add, Continue, Clear

# Missouri Public Service Commission

## EFIS – Submit New Case

27. After all service list members have been added, click the 'Continue' button to return to the **New Case Filing Screen**.

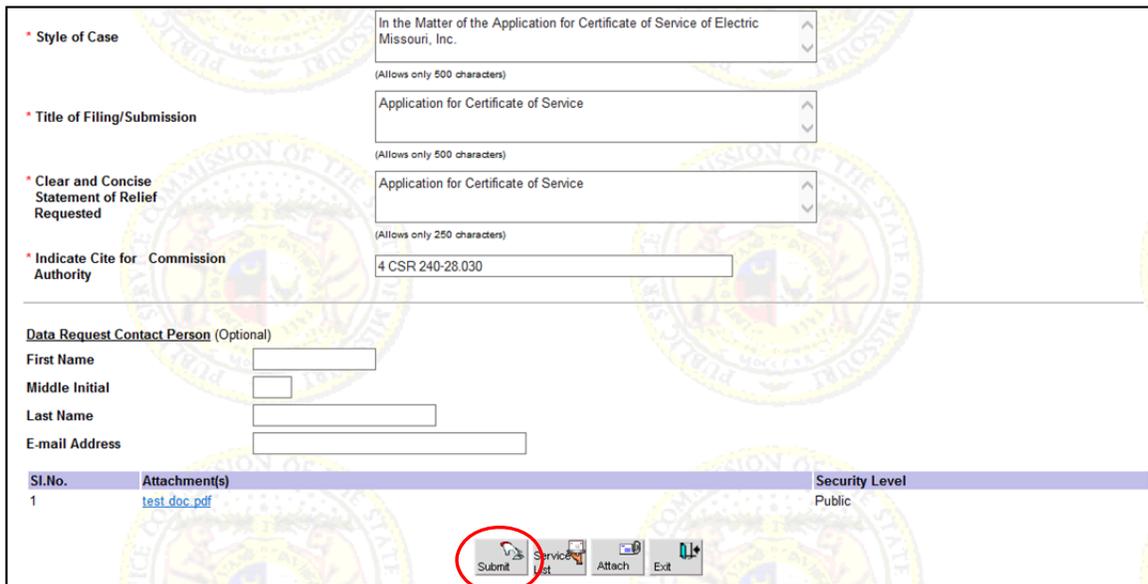


The screenshot shows the 'Subscriber Input Screen' with the following fields and controls:

- \* Required Fields**
- Name of Party**
- \* Company Name**: A dropdown menu with 'Select' as the current value.
- \* User Name**: A dropdown menu with 'Select' as the current value.
- A red note: *(User ID is required to add a party to the subscriber Service List -- User ID may be obtained by completing EFIS Registration.)*
- Buttons: 'Add', 'Continue', and 'Clear'.

Scroll to the bottom of the screen to proceed.

28. Click the 'Submit' button to submit the new case filing.



The screenshot shows the case filing form with the following fields and controls:

- \* Style of Case**: A dropdown menu with 'In the Matter of the Application for Certificate of Service of Electric Missouri, Inc.' selected. (Allows only 500 characters)
- \* Title of Filing/Submission**: A dropdown menu with 'Application for Certificate of Service' selected. (Allows only 500 characters)
- \* Clear and Concise Statement of Relief Requested**: A dropdown menu with 'Application for Certificate of Service' selected. (Allows only 250 characters)
- \* Indicate Cite for Commission Authority**: A text input field containing '4 CSR 240-28.030'.
- Data Request Contact Person (Optional)**: Fields for First Name, Middle Initial, Last Name, and E-mail Address.
- Attachment(s)** table:

Sl.No.	Attachment(s)	Security Level
1	<a href="#">test.doc.pdf</a>	Public

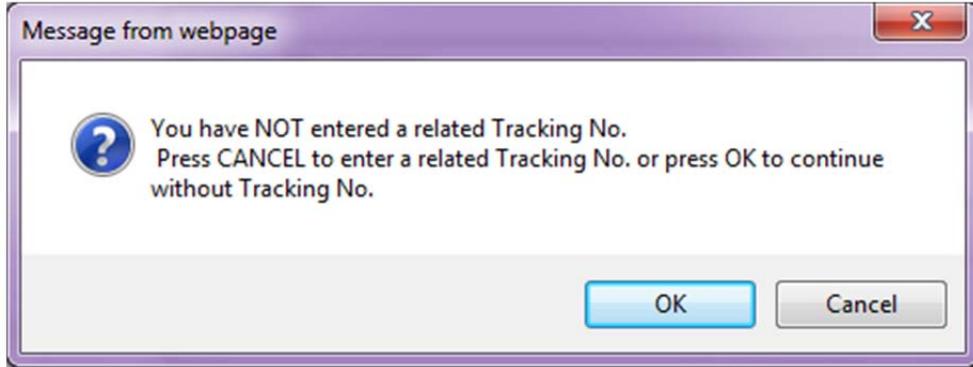
Buttons: 'Submit', 'Service List', 'Attach', and 'Exit'. The 'Submit' button is circled in red.

# Missouri Public Service Commission

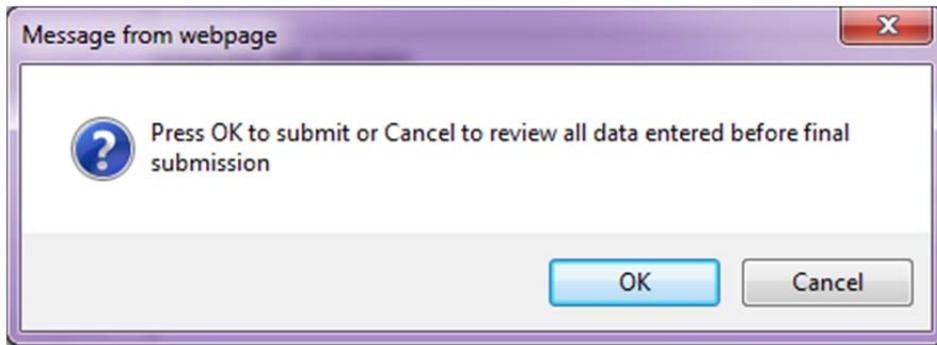
## EFIS – Submit New Case

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29. If a related case or tracking number was not entered in the 'Enter related case number(s) field', the following message will appear. If a related case or tracking number should be referenced, select '**Cancel**' to add it. If there is not a related case or tracking number, select '**OK**'.



30. Click the '**OK**' button to submit the filing or the '**Cancel**' button if changes need to be made.



A confirmation screen with the system-generated case number will appear.

31. Click the '**OK**' button to return to the **Filing/Submission Screen**.



For additional assistance, please contact the Data Center at 573-751-7496 (local to Jefferson City, MO) or [datacenter@psc.mo.gov](mailto:datacenter@psc.mo.gov).