QUICK START GUIDE

CALIFORNIA PUBLIC UTILITIES COMMISSION

ELECTRONIC FILING UPGRADE

August, 2015
INTRODUCTION

The California Public Utilities Commission has released a version of the web-based program used for submitting documents in formal proceedings.

These changes have been made to improve the filing experience.

The user interface has been simplified:

- There is now an easier login. The only requirement is an email address. Passwords are no longer required. If you have already registered, your current email address gives you access to the system.

- It is easier to enter information about the parties to a CPUC proceeding. A separate entry window for each party is used. After a party's information is complete, it appears in a tabular grid. That information can be edited or deleted.

- As PDF files are uploaded, a certificate of service is now mandatory for documents that require service. If attachments to a filing are used, multiple documents can be uploaded at the same time.

There is a new history screen:

- The complete filing history for the current user is now visible on one screen.

- There are instant reports on your filing’s status whether it has been accepted, rejected or is still awaiting processing by the CPUC.

- Information from a previous filing can be used to file again without re-entering new information.
Login screen

A password is no longer required. Using your email address will log you into the system.

Please Log In

Email

Password is no longer required

Login

Tab 1, Filer’s Information

The screen has been reorganized to distinguish between filing a new proceeding, filing in a continuing proceeding or resubmitting a previously-rejected transaction.

When filing in a continuing proceeding, the proceeding number will be verified. If the proceeding number is not valid, the filing cannot be submitted to the CPUC.
Tab 2, Cover Sheet

Party information is now entered through a popup form and the list of parties is in tabular format. When entering information about a party, the form distinguishes between a person and an organization.

![Add Participant Form](image)

Tab 3, Attachments

The screen has been reorganized to distinguish between the lead document and accompanying certificate of service, and any attachments submitted by the filer.

![Tab 3 Attachments](image)
**Section A** is for the lead document. There can be only one lead document. Depending on the document, a certificate of service is required. If the certificate is not attached, the filing cannot be submitted to the CPUC.

**Section B** is for one or more attachments. When the lead document, certificate of service (if required) and any optional attachments are uploaded, the Add to Filing button is activated.

Also under Section B, multiple documents can be uploaded at the same time.

**Section C** shows all documents submitted after the Add to Filing button is used. Unchecking the Use column removes the document from the submittal sent to the CPUC. The lead document can also be changed in this section.
Tab 4, Delivery

There are no changes in this tab.

History Screen

This screen shows the filing history for the current user. The screen is always ordered by filings awaiting processing by the CPUC, filings that have been accepted and filings that have been rejected. The list of documents can be filtered by a time period. The documents can be sorted by any column heading underlined in blue. The order of processing, acceptance and rejected will remain the same.

The buttons on the right will show all parties and will allow information from that filing to be used to file again in the same proceeding. If the filing data is reused, the filer will be returned to Tab 1, Filer's Information with the proceeding number already inserted. Information about the parties will be inserted on Tab 2, Cover Sheet. Information about specific parties can be edited. New parties can be added and existing parties deleted.
Supporting Documents

Testimony and workpapers can be uploaded as supporting documents. This feature is subject to approval by the presiding ALJ in specific proceedings.