**How To Training**

**For**

**Submit New Case or Filing**

The Case Filing module enables users to submit new cases and documents in electronic form for various types of matters to a document repository. New cases and document filings can be filed by authorized MPUC Staff and External Users with specifically applied access rights. To access the Case Filing Screen, authorized users should click on the **Case File link** on the Application Level Access Menu and select **Submit New Case or Filing**.

The user should enter the Case Filing details for processing a New Case filing. Some of the fields on this screen are mandatory entry fields as denoted by the red (**\***) asterisk; others fields are optional.

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### Submit New Case

**Objective:**

* Submit a Filing for a New Case

| **Step** | **Action** |
| --- | --- |
|  | From the **Home Page**, click on **Case File** 🡪 **Submit a New Case or Filing** on the access menu list |
|  | Select the **New Radio Button**  |
|  | In the **Add New Case Section*** Select from the drop down lists the following:
* **Utility/Industry Type**
* **Utility/Industry Subtype**
* **Case Type**
* **Case Subtype**
* To select a Pertaining to Utility/Company
* Click on **Add link**
* Click on **Search Button** to display all utilities/companies matching the previously selected Utility/Industry Type and Subtype

Select Utility/Company **Checkbox** and click on **Select Button*** Verify that the **Case Title** has been auto populated in multiline text box and can be edited
 |
|  | In the **Filing Information Section** * Enter **Description of Filing** in multiline test box
* **Date Filed** will be system populated with current date
* **Filed By** will be system populated with name of logged in External Registered User

To add **Representing Utility/Company*** **Filing Party Radio Button** for **Representing Utility/Company** should be selected by default
* Click **Add link** to display listing of Utilities/Companies Represented by the logged in user.
* Select applicable **Checkbox(es)**
* Click on **Select Button** to add selection
* If selection needs to be **Removed**
* Click on Utility/Company Name
* Click on **Remove link**
 |
|  | **Note:** If the utility/company that the logged in user represents is not displayed in Utility/Company Listing user should:* Go to **Home Page**
* **Click on Update Contact Information** and go to the bottom of the screen to update Representing
* Click on **Add hyperlink**

 |
|  | * **Search** for Representing Utility/Company
* Select **Checkbox** associated with Utility/Company that needs to be added to logged in users Representing list
* Click on **Select Button**
* To continue with New Case Filing go to **Case File** 🡪**Submit New Case or Filing Screen (**See Step 1 above**)**

 |
|  | To add filing for **Representing Self** (individual)* Select **Filing Party Radio Button** for **Representing Self**
	+ **Filed By** was system populated and will be used for “Representing Self”
	+ **Update Contact Information hyperlink** is displayed if filer information requires editing
 |
|  | In the **Statutory Reference Section*** Enter mandatory **Title** in textbox
* Enter mandatory **Section** textbox
* Click on **Add Button**
 |
|  | In the **MPUC Rule Reference Section*** Enter optional **Title** in textbox
* Enter optional **Section** intextbox
* Click on **Add Button**
 |
|  | In the **Add Public Document Section** * Select **Document Type** and **Document** **Subtype** from the drop down lists
* Enter **Document** **Title** in the multiline textbox
* Click on **Attach Non-Confidential Document(s) Button**

* **Click on Browse and** select the document you wish to attach
* Click on **Open**
* Click on **Done**
* Selected document should be displayed in the **Attached Documents grid**
* By clicking on Red **X** associated with attached document, the document can be deleted prior to submitting the filing
* Click on **Submit Button**
 |
|  | Case Filing Confirmation Message displayed* Case Number generated
* Email Notifications distributed to
	+ Notification List
	+ Active Party List
	+ Assigned MPUC Staff
 |

### Submit Filing in an Existing Case

**Objective:**

* Submit a Filing for an Existing Case

| **Step** | **Action** |
| --- | --- |
|  | From the **Home Page**, click on **Case File** 🡪 **Submit New Case or Filing** on the access menu list |
|  | **Existing Radio Button** should be selected by default |
|  | Enter the **Existing Case No.** in Text Box  |
|  | Click on **Go** |
|  | In the **Filing in Existing Case Section** existing case details will be displayed* Existing Case No.
* Utility/Industry Type
* Utility/Industry Subtype
* Case Type
* Case Subtype
* Pertaining to Utility/Company|
* Case Title
* Check if this is a Compliance Filing **Checkbox**
 |
|  | In the **Filing Information Section** * Enter **Description of Filing** in multiline test box
* **Date Filed** will be system populated with current date
* **Filed By** will be system populated with name of logged in External Registered User

To add **Representing Utility/Company*** **Filing Party Radio Button** for **Representing Utility/Company** should be selected by default
* Click **Add link** to display listing of Utilities/Companies Represented by the logged in user.
* Select applicable **Checkbox(es)**
* Click on **Select Button** to add selection
* If selection needs to be **Removed**
* Click on Utility/Company Name
* Click on **Remove link**
 |
|  | **Note:** If the utility/company that the logged in user represents is not displayed in Utility/Company Listing user should:* Go to **Home Page**
* **Click on Update Contact Information** and go to the bottom of the screen to update Representing
* Click on **Add hyperlink**

 |
|  | * **Search** for Representing Utility/Company
* Select **Checkbox** associated with Utility/Company that needs to be added to logged in users Representing list
* Click on **Select Button**
* To continue with New Case Filing go to **Case File** 🡪**Submit New Case or Filing Screen (**See Step 1 above**)**

 |
|  | To add filing for **Representing Self** (individual)* Select **Filing Party Radio Button** for **Representing Self**
	+ **Filed By** was system populated and will be used for “Representing Self”
	+ **Update Contact Information hyperlink** is displayed if filer information requires editing
 |
|  | In the **Add Public Document Section** * Select **Document Type** and **Document** **Subtype** from the drop down lists
* Enter **Document** **Title** in the multiline textbox
* Click on **Attach Non-Confidential Document(s) Button**

* **Click on Browse and** select the document you wish to attach
* Click on **Open**
* Click on **Done**
* Selected document should be displayed in the **Attached Documents grid**
* By clicking on Red **X** associated with attached document, the document can be deleted prior to submitting the filing
 |
|  | To file a Confidential document, click on **Attach Confidential Document(s) Button*** Click on **Browse** andselect the **Confidential Document** you wish to attach
* Select **Document Type** and **Document Subtype** from drop down list
* Enter **Document Title** in multiline text box
* Click on **Attach Button**

**Attach Confidential Document(s) pop-up window is displayed*** Click on **Browse** andselect the Confidential Document you wish to attach
* Click on **Browse** and select the **Redacted Version Document** you wish to attach
* Associate **Protective Order** by clicking on the hyperlink
* Click on **Done Button**
* Selected document should be displayed in the **Attached Documents grid**
* By clicking on Red *X* associated with attached document, the document can be deleted prior to submitting
 |
|  | * Click on **Submit Button**
 |
|  | Case Filing Confirmation Message displayed* Email Notifications distributed to
	+ Notification List
	+ Active Party List
	+ Assigned MPUC Staff
 |