**How To Training**

**for**

**Tariff Submission**

Submitter should be able to establish a New Tariff Book, (which will be done only once by a new company) Submit New Rate/Term in an Existing Book, and Submit Revision to Existing Rate/Term, Submit Complete Set of Rates/Terms, and View/Search Tariffs.

### Submit New Tariff Book

**Objective:**

* Submit New Tariff Book

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| **Step** | Action |
|  | * From the Home Page * Click on Tariff File from the Access Menu * From the Submenu, click on Submit New Tariff Book |
|  | * Establish New Tariff Book Screen will be displayed |
|  | User will be required to provide data in required ( \* ) fields in the following sections:  New Tariff Book   * + Utility/Industry Type (drop down list)   + Utility/Industry Subtype (drop down list)   + Pertaining to Utility (drop down list)   + Filed By (with lookup for Search Contact hyperlink)   + Effective Date (with calendar icon)   + Reference Case Number   + Explanation of Filing (multiline text box)   New Rate/Section   * + Tariff Type (drop down list)   + Rate Name (text box) (When Tariff Type is Rate ; Section Number disabled and vice versa)   + Section Number (text box)   + Reference Case No. (text box)   + Explanation of Tariff Change   + Rate/Section Description   + Effective Date (with calendar icon)   + Attach Document(s) Button   + Add Tariff Button (after attaching Rate Tariff user can click on button to append additional section for the Tariff)   + Back, Submit and Reset Buttons |
|  | * If user attempts to submit a tariff book which already exists, a message will be displayed to the Submitter – * “Tariff Book has already been established for the selected Utility Company. To make revision in existing book or add new Rate/Section, please select the appropriate Tariff Revision Screens.” * Filer will be required to submit tariff attachment as a PDF (Image on Text) document. |
|  | * On submit, a Tariff confirmation message will be displayed * Tariff Tracking Number will be generated (format TAR-YYYY-####, where LLL is the unique 3-digit code designated for Tariff Submissions) * Tariff submission will be routed to the Inbox 🡪 Tariff Queue of the Clerk of the Commission for processing * Email notification confirming receipt of successful tariff submission will be sent to the Clerk of the Commission and the Submitter of the tariff |

### Submit New Rate/Term

**Objective:**

* Submit New Rate or Section in Existing Tariff Book

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| **Step** | Action |
|  | * From the Home Page * Click on Tariff File from the Access Menu * From the Submenu, click on Submit New Rate/Term |
|  | * New Rate or Section in Existing Book Screen will be displayed |
|  | User will be required to provide data in required ( \* ) fields in the following sections:  New Rate or Section in Existing Tariff Book   * + Utility/Industry Type (drop down list)   + Utility/Industry Subtype (drop down list)   + Pertaining to Utility (drop down list)   + Filed By (with lookup for Search Contact hyperlink)   + Effective Date (with calendar icon)   + Reference Case Number   + Explanation of Filing (multiline text box)   New Rate/Section   * + Tariff Type (drop down list)   + Rate Name (text box) (When Tariff Type is Rate ; Section Number disabled and vice versa)   + Section Number (text box)   + Reference Case No. (text box)   + Explanation of Tariff Change   + Rate/Section Description   + Effective Date (with calendar icon)   + Attach Document(s) Button   + Add Tariff Button (after attaching Rate Tariff user can click on button to append additional section for the Tariff)   + Back, Submit and Reset Buttons |
|  | * Entry of each Rate/Section should be unique combination of tariff type and rate/section. User will be able add only one tariff for the same combination of Tariff Type/Rate/Section values. * On unsuccessful submission, submitter will receive a message that validation failed and the submission will not be submitted in the system. * Tariff submission will not be routed to the Clerk of Commission’s Tariff Queue. |
|  | * On successful submit, a Tariff confirmation message will be displayed * Tariff Tracking Number will be generated (format TAR-YYYY-####, where LLL is the unique 3-digit code designated for Tariff Submissions) * Tariff submission will be routed to the Inbox 🡪 Tariff Queue of the Clerk of the Commission for processing * Email notification confirming receipt of successful tariff submission will be sent to the Clerk of the Commission and the Submitter of the tariff |

### Revision to Existing Rate/Term

**Objective:**

* Submit Tariff Revision

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| **Step** | Action |
|  | * From the Home Page * Click on Tariff File from the Access Menu * From the Submenu, click on Revise Tariff |
|  | * Submit Revision To Rate/Section Screen will be displayed |
|  | User will be required to provide data in required ( \* ) fields in the following sections:  Submit Revision To Rate/Section   * + Utility/Industry Type (drop down list)   + Utility/Industry Subtype (drop down list)   + Pertaining to Utility (drop down list)   + Filed By (with lookup for Search Contact hyperlink)   + Effective Date (with calendar icon)   + Reference Case Number   + Explanation of Filing (multiline text box)   Revision to Rate/Section   * + Tariff Type (drop down list)   + Rate Name (Drop Down) (When Tariff Type is Rate ; Section Number disabled and vice versa)   + Section Number (Drop Down)   + Reference Case No. (text box)   + Explanation of Tariff Change   + Rate/Section Description   + Effective Date (with calendar icon)   + Attach Document(s) Button   + Add Tariff Button (after attaching Rate Tariff user can click on button to append additional section for the Tariff)   + Back, Submit and Reset Buttons |
|  | * When External Register User logs into the application, the system should be able to identify which company (ies) they should be able to submit tariff filings on behalf of * On the selection of the Utility/Industry Company, if Type is “Rate,” the Rate drop down list should be auto populated with the rates available in the tariff book for the selected Company * If Type is “Term,” the Section drop down list should be auto populated with the Section(s) available in the tariff book for the selected Company * User will be able to add more than one attachment(s) when filing a Revision to Rate/Section in Existing Book * Filer will be required to submit tariff attachment as a PDF (Image on Text) document. |
|  | * On successful submit, a Tariff confirmation message will be displayed * Tariff Tracking Number will be generated (format TAR-YYYY-####, where LLL is the unique 3-digit code designated for Tariff Submissions) * Tariff submission will be routed to the Inbox 🡪 Tariff Queue of the Clerk of the Commission for processing * Email notification confirming receipt of successful tariff submission will be sent to the Clerk of the Commission and the Submitter of the tariff |

### Submit Complete Set of Rates/Terms in Existing Book

**Objective:**

* Submit Complete Set of Rates/Terms

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| **Step** | Action |
|  | * From the Home Page * Click on Tariff File from the Access Menu * From the Submenu, click on Submit Complete Set of Rates/Terms |
|  | * Submit Complete Set of Rates/Terms will be displayed |
|  | User will be required to provide data in required ( \* ) fields in the following sections:  Complete Set of Rates/Sections   * + Utility/Industry Type (drop down list)   + Utility/Industry Subtype (drop down list)   + Pertaining to Utility (drop down list)   + Filed By (with lookup for Search Contact hyperlink)   + Effective Date (with calendar icon)   + Reference Case Number   + Explanation of Filing (multiline text box)   New to Rate/Section   * + Tariff Type (drop down list)   + Rate Name (Drop Down) (when Tariff Type is Rate ; Section Number disabled and vice versa)   + Section Number (Drop Down)   + Reference Case No. (text box)   + Explanation of Tariff Change   + Rate/Section Description   + Effective Date (with calendar icon)   + Attach Document(s) Button   + Add Tariff Button (after attaching Rate Tariff user can click on button to append additional section for the Tariff)   + Back, Submit and Reset Buttons |
|  | * When External Register User logs into the application, the system should be able to identify which company (ies) they should be able to submit tariff filings on behalf of * Submitter should be required to select Tariff Type: Rate or Term from mandatory drop down list. * Filer will be required to submit tariff attachment as a PDF (Image on Text) document. |
|  | * On successful submit, a Tariff confirmation message will be displayed * Tariff Tracking Number will be generated (format TAR-YYYY-####, where LLL is the unique 3-digit code designated for Tariff Submissions) * Tariff submission will be routed to the Inbox 🡪 Tariff Queue of the Clerk of the Commission for processing * Email notification confirming receipt of successful tariff submission will be sent to the Clerk of the Commission and the Submitter of the tariff |

### View or Search a Tariff

**Objective:**

* View rate/term in existing tariff book

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| **Step** | Action |
|  | * From the Home Page * Click on Tariff File from the Access Menu * From the Submenu, click on View/Search . |
|  | View Tariff Screen will display     * Click respective Radio Buttons to search by utility type or rate/section * Enter search criteria and click on View Button      * Search results will get display. Click on Rate/Section Number hyperlink to view the associated metadata and documents. |