To link a user to a company as their company representative:

> NOTE: Users must have a 'Professional Account' to be linked to the company.

1) Navigate to EFIS.
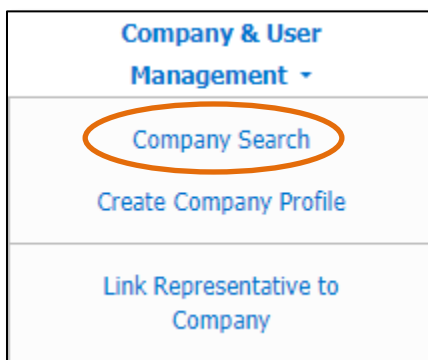2) Click the **Log In** link located in the *Header Links* in the upper, right-hand corner.

3) In the **Email Address** field, input the user's email address registered with their user account.
4) In the **Password** field, input the user's password.
5) Click the **Log In** button.

OPTION 1

1) Select the 'Company & User Management' tab.
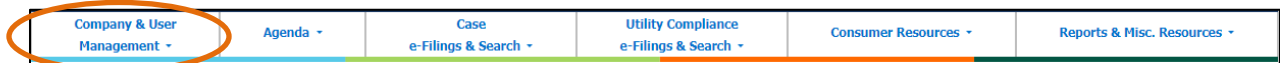
2) Select the 'Company Search' link.

3) Input the applicable search criteria.
4) Select the **Search** button; or click the **Clear** button to clear all fields and start over.

6) A list of companies matching the search criteria will be displayed below the Search button.
7) Click on the company name in the **Company** column to view the company's information.

8) In the *Representatives* section, click the **Request to be a Company Representative** button.

9) The **Name** field will auto populate to the user's name.
10) The **Company** field will auto populate to the company in which the user is requesting to be linked to.
11) In the **Representative Type** field, select the type of representative from the drop-down list.
12) In the **Address** field, select the address from the drop-down list.
   a) If the address is listed, skip to step 13.
   b) If the address isn't listed, click the **Add New** button below the field.

i) In the **Address Line 1** field, input the street and/or mailing address of the company.
ii) In the **Address Line 2** field, input an apartment, studio, or floor number, if applicable.
iii) In the **City** field, input the name of the city.
iv) In the **State** field, select the name of the state from the drop-down list.

> *NOTE: This field defaults to 'United States of America'.*

v) In the **Zip** field, input the zip code.
vi) In the **County** field, select the name of the county from the drop-down list.
vii) In the **Country** field, select the name of the country from the drop-down list.

> *NOTE: This field defaults to 'United States of America'.*

viii) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

Add Address ✕

Address Line 1	1234 Main St
Address Line 2	Apartment, studio, or floor
City	City
State	Missouri ⌄
Zip	Zip
County	(Select) ⌄
Country	United States of America ⌄

Submit   Clear

13) In the **Email Address** field, select the email address from the drop-down list.
   a) If the email address is listed, skip to Step 14.
   b) If the email address is not listed, click the **Add New** button to add a new address.

Email Address	(Select) ⌄
	➕ Add New

   i) In the **Email Address** field, input the email address.
   ii) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

Add Email Address ✕

Email Address	email@provider.com

Submit   Clear

14) In the **Phone** field, select the applicable phone number from the drop-down list.

a) If the phone number is listed, skip to step 15.
b) If the email address is not listed, click the **Add New** button to add a new address.

Phone	(Select) ⌄
	+ Add New

i) In the **Phone Type** field, select the type of phone from the drop-down list.
ii) For the **Is International** checkbox, check the box if the phone number is an international number.
iii) In the **Number** field, input the phone number with area code.
iv) In the **Extension** field, input an extension if needed.
v) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

Add Phone ✕

Phone Type	(Select) ⌄
Is International	☐
Number	(000) 000-0000
Extension	0000

Submit   Clear

15) After all fields have been completed, click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

Submit   Clear

OPTION 2

16) Select the 'Company & User Management' tab.

Company & User Management ▾	Agenda ▾	Case e-Filings & Search ▾	Utility Compliance e-Filings & Search ▾	Consumer Resources ▾	Reports & Misc. Resources ▾

17) Select the 'Link Representative to Company' link.

18) The user's name should auto populate in the **Name** field.
   a) If the user is needing to link another user as a company representative, click the **Find** button.
   b) If the user is linking themselves as a company representative, skip to step 5.

   c) In the *Person Search* input screen, input the applicable criteria to find the correct Official Representative.

   > NOTE: This user must have a 'Professional Account' already established in EFIS.

   d) Click the **Search** button; or click the **Clear** button to clear all fields and start over.

e) A list of users will be displayed at the bottom of the *Person Search* display screen.
   i) Select the applicable user by clicking the **Select** button beside the user's name.

19) In the **Company** field, input the name of the company. As the user begins to input the name, a list of companies matching the letters should begin to be listed. The user can finish inputting the full company name or select from the list.

20) In the **Representative Type** field, select the type of representative from the drop-down list.
21) In the **Address** field, select the address from the drop-down list.
    a) If the address is listed, skip to step 9.
    b) If the address isn't listed, click the **Add New** button below the field.

    ix) In the **Address Line 1** field, input the street and/or mailing address of the company.
    x) In the **Address Line 2** field, input an apartment, studio, or floor number, if applicable.
    xi) In the **City** field, input the name of the city.
    xii) In the **State** field, select the name of the state from the drop-down list.

> *NOTE: This field defaults to 'United States of America'.*

    xiii) In the **Zip** field, input the zip code.
    xiv) In the **County** field, select the name of the county from the drop-down list.
    xv) In the **Country** field, select the name of the country from the drop-down list.

> *NOTE: This field defaults to 'United States of America'.*

    xvi) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

Add Address ✕

Address Line 1	1234 Main St
Address Line 2	Apartment, studio, or floor
City	City
State	Missouri ⌄
Zip	Zip
County	(Select) ⌄
Country	United States of America ⌄

Submit   Clear

22) In the **Email Address** field, select the email address from the drop-down list.
    a) If the email address is listed, skip to Step 10.
    b) If the email address is not listed, click the **Add New** button to add a new address.

Email Address   (Select) ⌄
+ Add New

     i) In the **Email Address** field, input the email address.
    ii) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

Add Email Address ✕

Email Address   email@provider.com

Submit   Clear

23) In the **Phone** field, select the applicable phone number from the drop-down list.

a) If the phone number is listed, skip to step 11.
b) If the email address is not listed, click the **Add New** button to add a new address.

Phone   (Select)   ⌄
+ Add New

i)   In the **Phone Type** field, select the type of phone from the drop-down list.
ii)   For the **Is International** checkbox, check the box if the phone number is an international number.
iii) In the **Number** field, input the phone number with area code.
iv) In the **Extension** field, input an extension if needed.
v)   Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

Add Phone   ✕

Phone Type   (Select)   ⌄

Is International ☐

Number   (000) 000-0000

Extension   0000

                        Submit   Clear

24) After all fields have been completed, click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

                        Submit   Clear

For additional assistance, please contact the Data Center at (573) 751-7496 or dcsupport@psc.mo.gov.