



EFIS Guidance for Customizing Notifications

EFIS Guidance for Managing & Customizing Notifications

NOTE: The PSC discourages users from sharing user credentials with others individuals. Certain contact types, such as attorneys, data request contacts, case consultants, and official representatives are given a greater of level of user-functionality along with increased data access, including access to confidential and highly confidential documents. **Sharing user credentials with others may put data at risk.**

How to Customize Notifications:

There are various ways in which notification preferences can be customized for users. Some helpful techniques are provided below.

- Add an Alternate E-mail Address to Your User Account
- Change Your Default E-mail Address for EFIS Notifications
- Update Company Contact Information to Send Notifications to Different E-mail Addresses per Notification Type
- Create Custom Subscriptions

Add an Alternate E-mail Address to Your User Account:

1. [Login](#) to EFIS.
From the [Dashboard](#), click the 'Account' dropdown menu
2. Select the '**Account Summary**' option.



3. On the Account Summary display, click the 'Manage' button next to the Email heading.



4. On the Account Email List screen, click the '**Add Email Address**' option.



5. On the **Add Email Address** accordion, input an additional email address.



EFIS Guidance for Customizing Notifications

- If the e-mail address is to be the default e-mail address for EFIS notifications, *rather than the account e-mail address*, check the **'Default Notification Email'** box.

Add Email Address ▾

Items with an orange left border () are required.

Default Notification Email

Email Address

Submit Clear

- To save the changes, click the **'Submit'** button.

Change Your Default E-mail Address for EFIS Notifications:

- [Login](#) to EFIS.
- From the [Dashboard](#), click the 'Account' dropdown menu.
- Select the **'Account Summary'** option.

Dashboard Help

Account ▾

Company Representative Display Submission List

Account Summary

- On the **Account Summary** display, click the **'Manage'** button next to the 'Email' heading.

Email Manage

- On the **Account Email List** screen, check the **'Default Notification Email'** box next to the preferred e-mail address to receive EFIS notifications.

Account Email List

Default Notification Email	Email Address
<input type="checkbox"/>	johnjohn@gmail.com (Login) Close
<input checked="" type="checkbox"/>	john@gmail.com Close

Add Email Address ▾

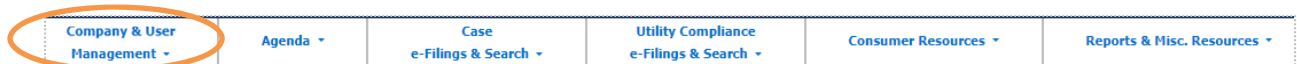


EFIS Guidance for Customizing Notifications

Update Company Contact Information to Send Notifications to Different E-mail Addresses per Notification Type

This option is available only to contacts who are linked to a company. To learn how to establish a link to a company, click the Help button on the page linked [here](#).

1. [Login](#) to EFIS.
2. Select 'Company & User Management' from the menu.



3. Click the '[Link Representative to Company](#)' option.



4. To **create a link** to a company representative or search for an existing representative, click the Help button on the page linked [here](#) and follow the instructions provided
5. The e-mail address for each company representative link can be **customized** by representative type, so that different types of notifications can be sent to different e-mail addresses for the user.

Users can designate those e-mail addresses when the company representative link is created or by simply editing the e-mail address in an existing company link.

For example: A user can elect to receive tariff notifications at a different e-mail address than their default email address. They could also elect to receive Data Request notifications at yet another e-mail address.



EFIS Guidance for Customizing Notifications

Link Representative to Company Help

Items with an orange left border () are required.

Name

Company

Representative Type

Address

Email Address

Phone

NOTE:
The combination of these two fields determines which notifications go where.

Create Custom Subscriptions:

Users can create custom subscriptions to receive additional notifications.

Please note these notifications are **separate** from notifications triggered by company links and are managed via the subscription link in the dashboard.

1. [Login](#) to EFIS.
2. Click the '[Dashboard](#)' link.
3. From the Dashboard, click the '[Email Subscription List](#)' menu item.
4. In the **Email Subscription List** screen, complete the fields under the '**Add Email Subscription**' accordion.

Email Subscription List

Add Email Subscription ▼

Items with an orange left border () are required.

Subscription Name Instructions

Submission Type

Notify How Often



EFIS Guidance for Customizing Notifications

5. For **Subscription Name** – Create any custom name you chose, for example: “Weekly Tariff Filings”.
6. In the **Submission Type** – select a type of notification from the list provided.
7. After the Submission Type is selected, additional fields related to the submission type will appear. These fields will allow users to further refine the specifications for the desired notifications.

Examples: A user could specify to receive a list of electric tariffs filings, or perhaps receive notifications of electric tariff filings for just a specific company.

Email Subscription List

Add Email Subscription ▾

Items with an orange left border () are required.

Subscription Name [Instructions](#)

Submission Type ▾
 ▾

Action ▾

Utility Type ▾

Company

Notify How Often ▾


8. After customizing the specifications, the user should determine the frequency of notifications from the ‘**Notify How Often**’ list.
 - **Once a day** (sends a single, daily digest email)
 - **Once a week** (sends a single, weekly digest email)
 - **As soon as possible** (sends emails as soon as the submission is submitted into EFIS)



EFIS Guidance for Customizing Notifications

9. After submitting the subscription specifications:

- The custom notification will appear in the users **Email Subscription List**.
- Users can **delete** a subscription at any time to stop receiving notifications.
- There is **no edit** functionality, so to modify a subscription, the user must create a new subscription and delete the one that needed modification.

Email Subscription List					
	<u>Subscription Name</u>	<u>Submission Type</u>	<u>Action</u>	<u>Additional Criteria</u>	<u>Notify How Often</u>
 Delete	Weekly Tariff Filings	Tariff	New Submission Created	Utility Type: Electric	Once a Week