



Link Company Representative

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

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

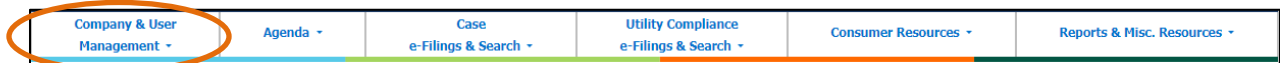
- 1) Navigate to EFIS.
- 2) Click the **Log In** link located in the *Header Links* in the upper, right-hand corner.



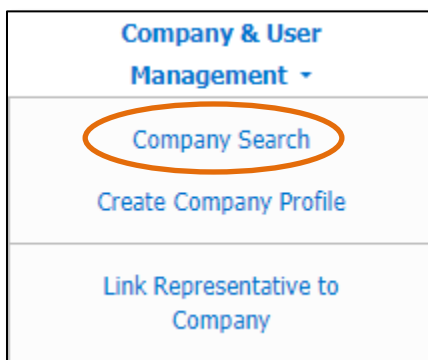
- 3) In the **Email Address** field, input the user's email address registered with their user account.
- 4) In the **Password** field, input the user's password.
- 5) Click the **Log In** button.

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.



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Company Search

Search Criteria Help

Utility Type (Select)	Company Type (Select)	Company <input type="text"/>	EFIS Company Status Both
		Include Related Companies: <input type="checkbox"/>	
Email Address <input type="text"/>	Address 1234 Main St	City <input type="text"/>	State (Select)
Zip <input type="text"/>	Country (Select)	Phone Number <input type="text"/>	Certification/Registration Status (Select)

Search Clear

- 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.

Search complete. The results are displayed below.

Search Clear

Returning 10 / 153

Company	Utility Type	Email	Address	Phone Number	EFIS Company Status	Certification/Registration	Parent Company	Doing Business As
Algonquin Power Company	Electric Company Type: Independent Power Producer		2845 Briston Circle Oakville, Ontario L6H 7H7 Canada (Primary)	Fax: (905) 465-4514 Work: (905) 465-4531	Open	Not Certified		
Ameren Illinois Company	Electric Company Type: Investor		300 Liberty Peoria, IL 61602 (Primary)	Toll Free: (800) 755-5000	Open	Not Certified		

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

Representatives Request to be Company Representative

	Representative Type	Name	Address	Email Address	Phone
View	Official Representative	Anderson, Todd	2845 Bristol Circle Oakville, Ontario L6H 7H7 Canada	todd.anderson@algonquinpower.com	Work: (905) 465-4531

- 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.



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Link Representative to Company Help

Items with an orange left border () are required.

Name	User, Professional
Company	Algonquin Power Company (Electric) (Independent Power Producer)
Representative Type	(Select) <input type="text"/>

- 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

Address Line 2

City

State

Zip

County

Country

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

- 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

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



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- 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.



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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.



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Person Search

Search Criteria ▾

Name	Address
<input type="text" value="First"/>	<input type="text" value="Address Line"/>
<input type="text" value="Middle"/>	<input type="text" value="City"/>
<input type="text" value="Last"/>	<input type="text" value="(Select State)"/>

- 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.

Person Search

Search Criteria ▾

Name	Address
<input type="text" value="Official"/>	<input type="text" value="Address Line"/>
<input type="text" value="Middle"/>	<input type="text" value="City"/>
<input type="text" value="Representative"/>	<input type="text" value="(Select State)"/>

Search complete. The results are displayed below.

Name	Address	Is Attorney
<input type="button" value="Select"/> Representative, Official	123 East Street Jefferson City, MO 65101	No

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.



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Items with an orange left border () are required.

Name User, John

Company

- 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.

Representative Type

Address

- 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.



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Add Address ✕

Address Line 1

Address Line 2

City

State

Zip

County

Country

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

- 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

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



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- 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.

A form field labeled "Phone" with a dropdown menu showing "(Select)" and a green "+ Add New" button below it.

- 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.

The "Add Phone" dialog box contains the following fields and controls:

- Phone Type**: A dropdown menu with "(Select)" selected.
- Is International**: An unchecked checkbox.
- Number**: A text input field with the placeholder "(000) 000-0000".
- Extension**: A text input field with the placeholder "0000".
- Submit** and **Clear** buttons at the bottom.

- 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.

A close-up of the "Submit" and "Clear" buttons from the previous form.

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