



## Add Utility Type to Existing Company

To add another utility type to an existing company:

**NOTE:** Users must have a 'Professional Account' and linked to the company they are filing on behalf of.

- 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.

- 6) Select the 'Company & User Management' tab.



- 7) Select the 'Company Search' link.



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



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The screenshot shows a 'Company Search' form with a 'Search Criteria' dropdown and a 'Help' button. The form contains several input fields: 'Utility Type' (dropdown), 'Company Type' (dropdown), 'Company' (text), 'Email Address' (text), 'Address' (text with '1234 Main St'), 'City' (text), 'State' (dropdown), 'Zip' (text), 'Country' (dropdown), 'Phone Number' (text), and 'EFIS Company Status' (dropdown). There is an 'Include Related Companies' checkbox and a 'Search' button.

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

Search complete. The results are displayed below.

Search Clear

Results to Excel

Returning 1 / 1

Company ^	Utility Type	Email	Address	Phone Number	EFIS Company Status	Certification/Registration	Parent Company	Doing Business As
<a href="#">Missouri Utility Company</a>	Electric Company Type: Investor	info@mouutilityco.com	123 East Street Jefferson City, MO 65101 (Primary)	Work: (123) 456-7890	Open	Not Certificated		

- 12) On the *Company Information* page, click the **Add New Utility Type +** button.

Company Information

Print Help

Company Missouri Utility Company Edit

Parent Company

Doing Business As

Company Information

Relationships Edit

No relationships have been recorded.

Electric Add New Utility Type +

Utility Type Electric Edit

Company Type Investor

Utility Information



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13) In the **Utility Type** field, select the applicable type of utility from the drop-down list. Once this field has been selected, an additional **Company Type** field will display.

14) In the **Company Type** field, select the applicable type of company from the drop-down list.

The screenshot shows a form with a blue header containing 'Electric' and 'Add New Utility Type +'. Below the header is a light blue box with the text 'Items with an orange left border ( ) are required.' There are two dropdown menus: 'Utility Type' with 'Gas' selected and 'Company Type' with '(Select)' selected. Both dropdown menus have an orange vertical bar on their left side.

15) In the **Address** section, complete the following:

- a) If the address is the same as the existing utility type, check the box under **Include on Company**.
- b) If the address is the primary address, check the box under **Primary**.

The screenshot shows the 'Address' section of the form. It features a table with the following columns: 'Include on Company', 'Primary', 'Address', 'City', 'State', and 'Zip'. The table contains one row of data: '123 East Street', 'Jefferson City', 'MO', and '65101'. There are checkboxes for 'Include on Company' and 'Primary', both of which are currently unchecked. A green '+ Add New' button is located at the bottom right of the table.

- c) If the address is not the same address as the existing utility type, click the **+ Add New** button.
  - i) On the **Add Address** input screen, complete the following information:
    - (1) For the **Primary** checkbox, uncheck the box only if the address entered will not be the primary address of the company.

*NOTE: If the address is not the primary address, a primary address must be added to complete the creation of the company profile.*

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

*NOTE: This field defaults to 'Missouri'.*

- (6) In the **Zip** field, input the zip code.



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- (7) In the **County** field, select the name of the county from the drop-down list.
- (8) In the **Country** field, select the name of the country from the drop-down list.

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

- (9) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.
- (10) Repeat steps 6 & 7 if an additional address is needed.

**Add Address** [Close]

**Primary**

**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**

- 16) In the *Email Address* section, complete the following:
  - a) If the email address is the same as the existing utility type, check the box under **Include on Company**.
  - b) If the email address is different than the existing utility type, click the **Add New** button.

**Email Address**

Include on Company	Email Address
<input type="checkbox"/>	info@mouilityco.com

**+ Add New**

- i) On the *Email Address* input screen, complete the following information:
  - (1) In the **Email Address** field, input the company's email address.
  - (2) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.
  - (3) Repeat steps 8 & 9 if an additional email address is needed.



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### Add Email Address ✕

Please enter an email address belonging to the company being registered. This field is not intended for personal email addresses.

Email Address

17) In the *Phone* section, complete the following:

- a) If the phone type and number are the same as the existing utility type, check the box under **Include on Company**.
- b) If the phone type and number are different than the existing utility type, click the **Add New** button.

### Phone

Check if phone information not available:

Include on Company	Phone Type	Number
<input type="checkbox"/>	Work	(123) 456-7890

- i) On the *Phone* input section, complete the following information:
  - (1) In the **Phone Type** field, select the applicable type of phone from the drop-down list.
  - (2) For the **Is International** checkbox, check the box if the phone number is an international number.
  - (3) In the **Number** field, input the phone number with area code.
  - (4) In the **Extension** field, input an extension if needed.
  - (5) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.
  - (6) Repeat steps 10 & 11 if an additional phone number is needed.



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**Add Phone** [Close]

Phone Type: (Select) [v]

Is International:

Number: (000) 000-0000

Extension: 0000

[Submit] [Clear]

18) In the *Representative* section, complete the following information:

- a) In the **Representative Type** field, select the type of company representative the user is from the drop-down list.

*NOTE: This field defaults to the type of representative the user currently has under the existing utility type.*

- i) If the type of representative selected is incorrect, select the applicable type of representative from the drop-down list.

**Representative**

Name	User, Professional

Representative Type: Official Representative [v]

b) In the **Address** field, select the address from the drop-down list.

- i) If the address is not already listed in the drop-down list, click the **Add New** button to add a new address.

Address: (Select) [v]

[+ Add New]

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

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

- (5) In the **Zip** field, input the zip code.
- (6) In the **County** field, select the name of the county from the drop-down list.



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(7) In the **Country** field, select the name of the country from the drop-down list.

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

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

The screenshot shows a form titled "Add Address" with a close button in the top right corner. The form contains the following fields:

- Address Line 1:** Text input field containing "1234 Main St".
- Address Line 2:** Text input field containing "Apartment, studio, or floor".
- City:** Text input field containing "City".
- State:** Drop-down menu showing "Missouri".
- Zip:** Text input field containing "Zip".
- County:** Drop-down menu showing "(Select)".
- Country:** Drop-down menu showing "United States of America".

At the bottom of the form are two buttons: "Submit" (blue) and "Clear" (white with blue border).

c) In the **Email Address** field, select the email address from the drop-down list.

i) If the email address is not listed, click the **Add New** button to add a new email address.

The screenshot shows a form field labeled "Email Address" with a drop-down menu showing "(Select)". Below the drop-down menu is a green button with a plus sign and the text "+ Add New".

(1) In the **Email Address** field, input the email address.

(2) 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 Email Address

Email Address

- d) In the **Phone** field, select the applicable phone number from the drop-down list.
  - i) If the phone number is not listed, click the **Add New** button to add a new phone number.

Phone

- (1) In the **Phone Type** field, select the type of phone from the drop-down list.
- (2) For the **Is International** checkbox, check the box if the phone number is an international number.
- (3) In the **Number** field, input the phone number with area code.
- (4) In the **Extension** field, input an extension if needed.
- (5) 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

Is International

Number

Extension

- 19) If the user is not the Official Representative of the company, the *Official Representative* section will be displayed, complete the following information:
  - a) In the **Name** field, select the **Find** button to select the Official Representative of the company.



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Official Representative

Please list the Official Representative who will be responsible for maintaining Company's/Firm's contact information.

Name

Representative Type Official Representative

- b) 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.*

- c) Click the **Search** button.

Person Search ×

Search Criteria ▾

**Name**

**Address**

▾

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



## Add Utility Type to Existing Company

### Person Search

Search Criteria ▾

<input type="text" value="Official"/>	<input type="text" value="Middle"/>	<input type="text" value="Address Line"/>
<input type="text" value="Representative"/>		<input type="text" value="City"/>
		<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

- e) In the **Address** field, select the address from the drop-down list.
  - i) If the address is listed, skip to step 13)f).
  - ii) If the address is not already listed in the drop-down list, click the **Add New** button to add a new address.

Address

- (1) In the **Address Line 1** field, input the street and/or mailing address of the company.
- (2) In the **Address Line 2** field, input any apartment, studio, or floor number.
- (3) In the **City** field, input the name of the city.
- (4) In the **State** field, select the name of the state from the drop-down list.

*NOTE: This field defaults to 'Missouri'.*

- (5) In the **Zip** field, input the zip code.
- (6) In the **County** field, select the name of the county from the drop-down list.
- (7) In the **Country** field, select the name of the country from the drop-down list.

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

- (8) 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** [X]

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]

- f) In the **Email Address** field, select the email address from the drop-down list.
  - i) If the email address is listed, skip to step 13)g).
  - ii) If the email address is not listed, click the **Add New** button to add a new address.

Email Address: (Select) [v]

[+ Add New]

- (1) In the **Email Address** field, input the email address.
- (2) 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** [X]

Email Address: email@provider.com

[Submit] [Clear]

- g) In the **Phone** field, select the applicable phone number from the drop-down list.
  - i) If the phone number is listed, skip to step 14.
  - ii) If the email address is not listed, click the **Add New** button to add a new address.



## Add Utility Type to Existing Company

Phone (Select) + Add New

- (1) In the **Phone Type** field, select the type of phone from the drop-down list.
- (2) For the **Is International** checkbox, check the box if the phone number is an international number.
- (3) In the **Number** field, input the phone number with area code.
- (4) In the **Extension** field, input an extension if needed.
- (5) 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

- 20) 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](mailto:dcsupport@psc.mo.gov).