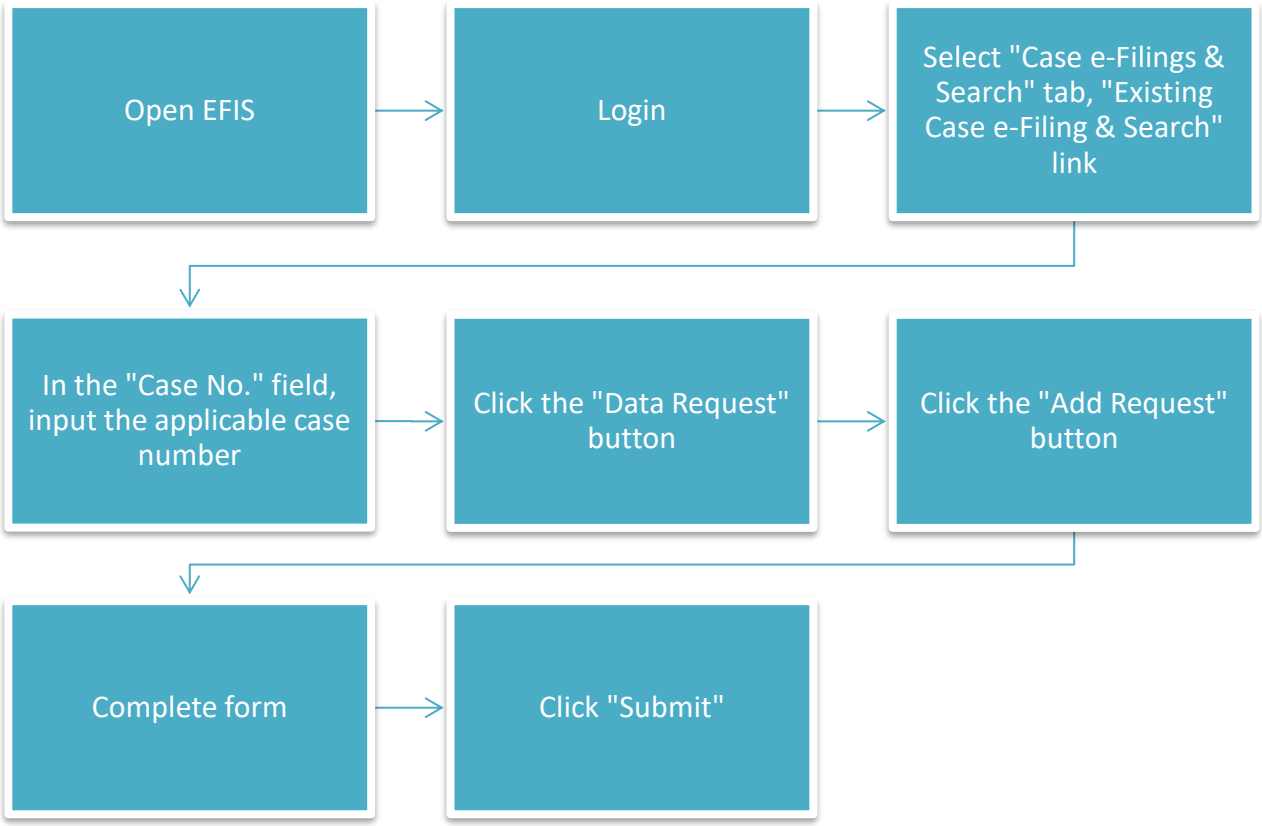
New Data Request

Data Requests are discovery for cases and some non-case submissions in EFIS. Data requests submitted in EFIS must involve the PSC. This means if the PSC Staff issues a data request to an external party or if the external party issues a data request to the PSC will it be submitted in EFIS. Data requests submitted from external party to external party cannot be submitted in EFIS.

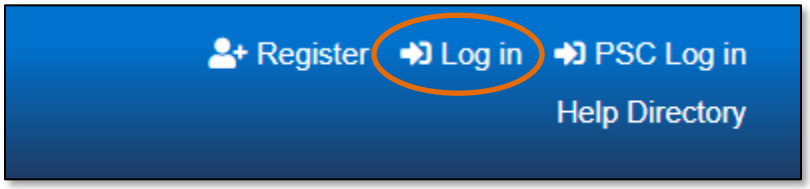
To submit a new data request in a Commission case:

AT-A-GLANCE:



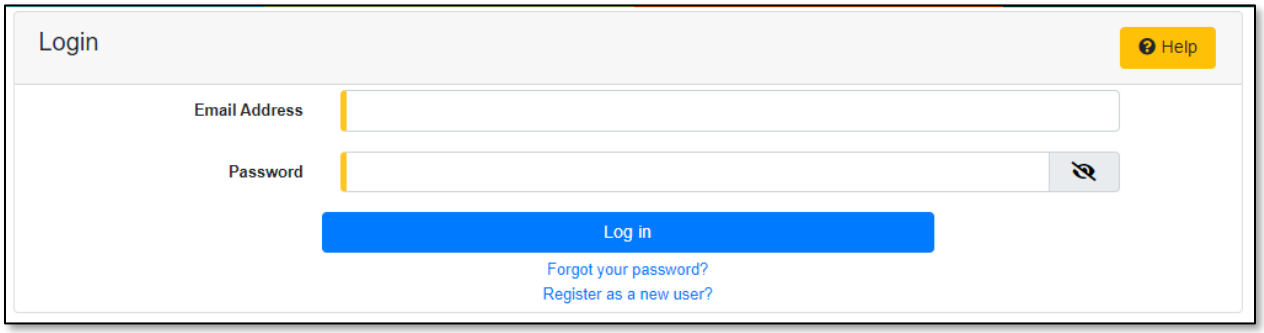
IN DETAIL:

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



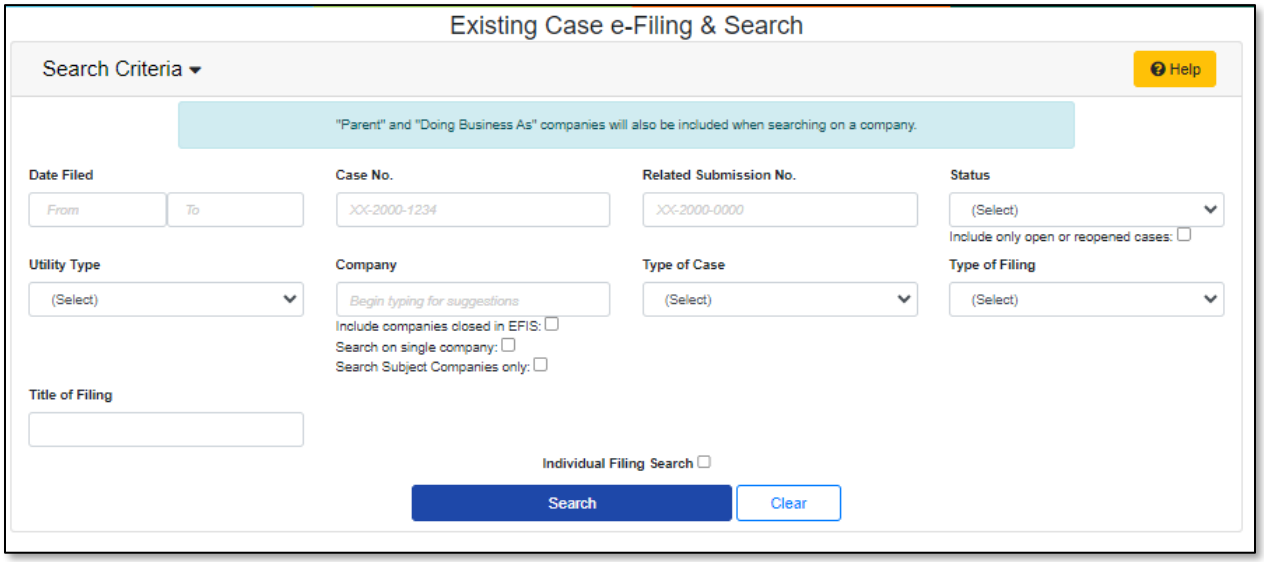
3) In the **Email Address** field, input the user's email address registered with their user account.
4) In the **Password** field, input the user's password.

5) Click the **Log In** button.

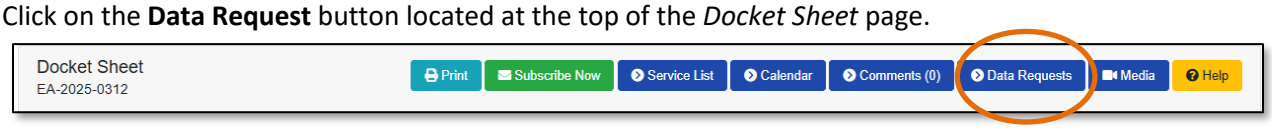


6) Select the 'Case e-Filings & Search' tab.
7) Select the 'Existing Case e-Filing & Search' link.

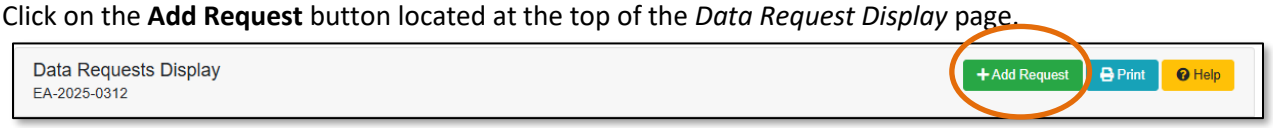
8) In the **Case No.** field, input and select the applicable case number.
9) Select the **Search** button; or click the **Clear** button to clear all fields and start over.



10) Click on the **Data Request** button located at the top of the *Docket Sheet* page.



11) Click on the **Add Request** button located at the top of the *Data Request Display* page.



12) The following fields will auto populate.
    a) **Submission No.**
    b) **Description**
    c) **Subject Company**
    d) **Style of Case**
    e) **Contact Person**
    f) **Due Date**
13) If the data request is a follow-up request to a previously issued data request, check the box labeled **Adding Sub Item No.:**. If the data request is not a follow-up, then skip to step 14.

    a) In the **Request No.** field, input the original data request number. *(Do not enter any sub numbers.)*

14) In the **Due Date** field, the date listed defaults to the due date according to the case calendar, amend if necessary.
15) In the **Issue** field, select the applicable issue from the drop-down list.

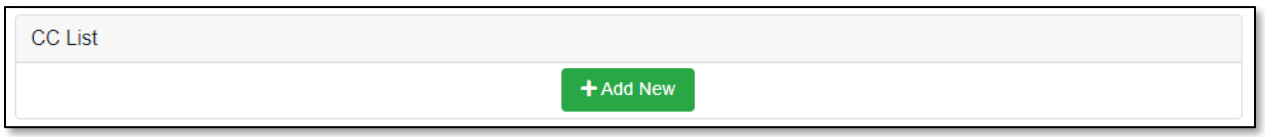
16) In the **Sub-Issue** field, select the applicable sub-issue from the drop-down list, if any.
17) In the **Sub-Issue 2** field, select the applicable sub-issue 2 from the drop-down list.

18) In the *Requested From* section, complete the following:
    a) The **Company** field will auto populate with 'MO PSC Staff'.
    b) The **Person** field will auto populate with the MO PSC Staff's lead attorney for the case.

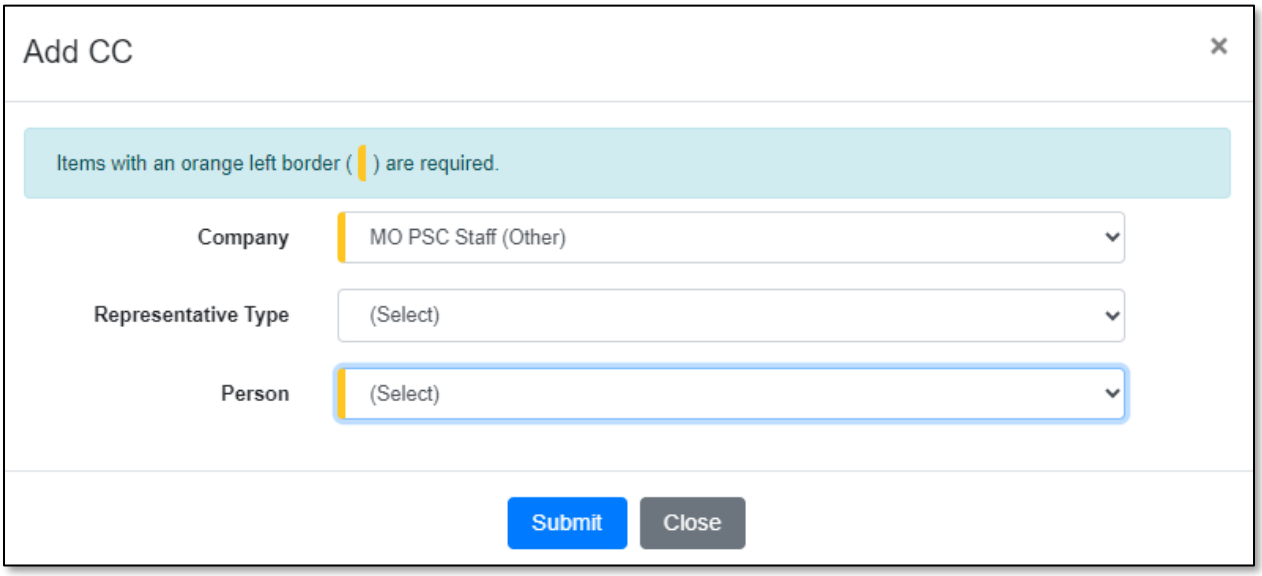
19) In the *Requested By* section, complete the following:
    a) In the **Company** field, select the applicable company from the drop-down list.
    b) The **Person** field will auto populate to the user logged in at the time of submission.
    c) In the **Email** field, select the applicable email address from the drop-down list.

20) In the **Brief Description** field, input a brief description of the data request.
21) In the **Description** field, input a description of the data request.
22) Check the box in front of **Check here to designate a Data Request as 'Highly Confidential'** if the data request is deemed highly confidential.
    a) A protective order must be submitted and approved in the case before a data request can be labeled highly confidential.
23) In the **Request Security** field, select the security level of the data request from the drop-down list.
24) If the data request is confidential or highly confidential, then the **Rationale** field must be completed by inputting a reasoning as to why the data request is labeled as such.

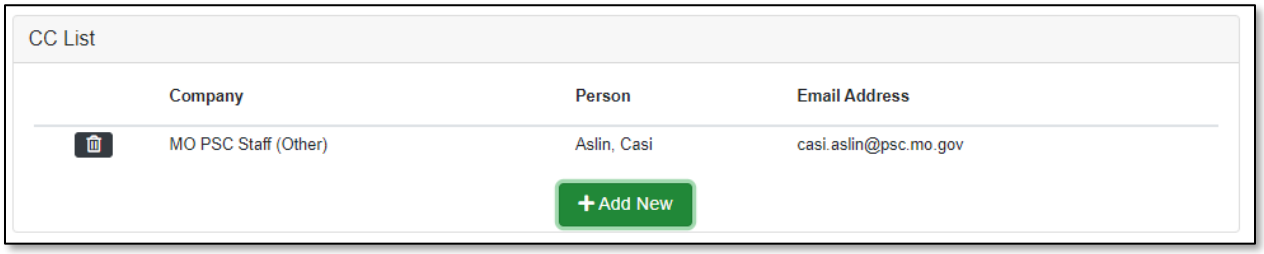
25) In the *CC List* section, click the **Add New** button if another user needs to be copied in on the data request.



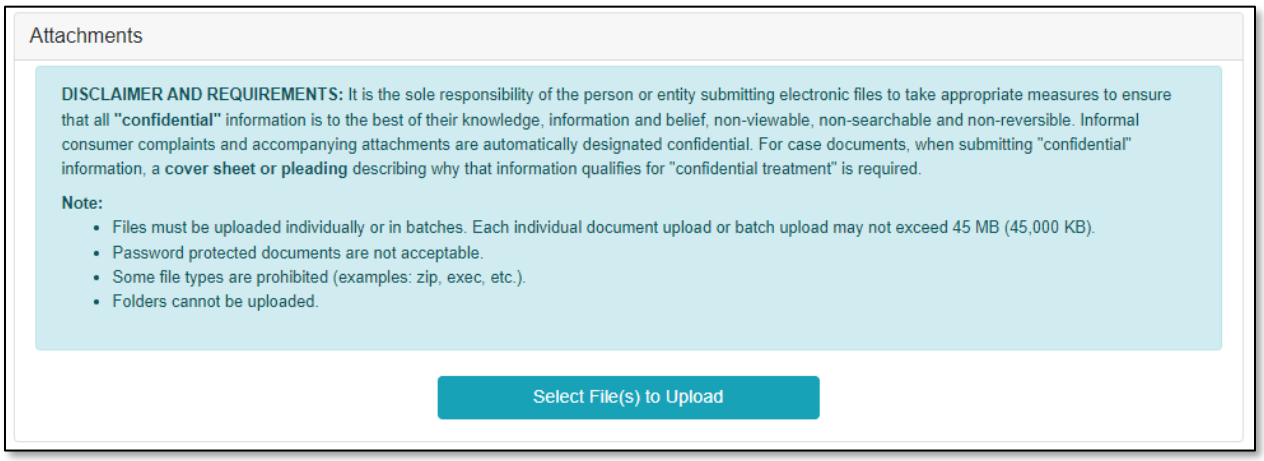
26) An *Add CC* pop-up message will be displayed. Complete the following:
   a) In the **Company** field, select the applicable company from the drop-down list.
   b) In the **Representative Type** field, select the type of representative from the drop-down list if the user needs to narrow their list for the next field.
   c) In the **Person** field, select the applicable person from the drop-down list.



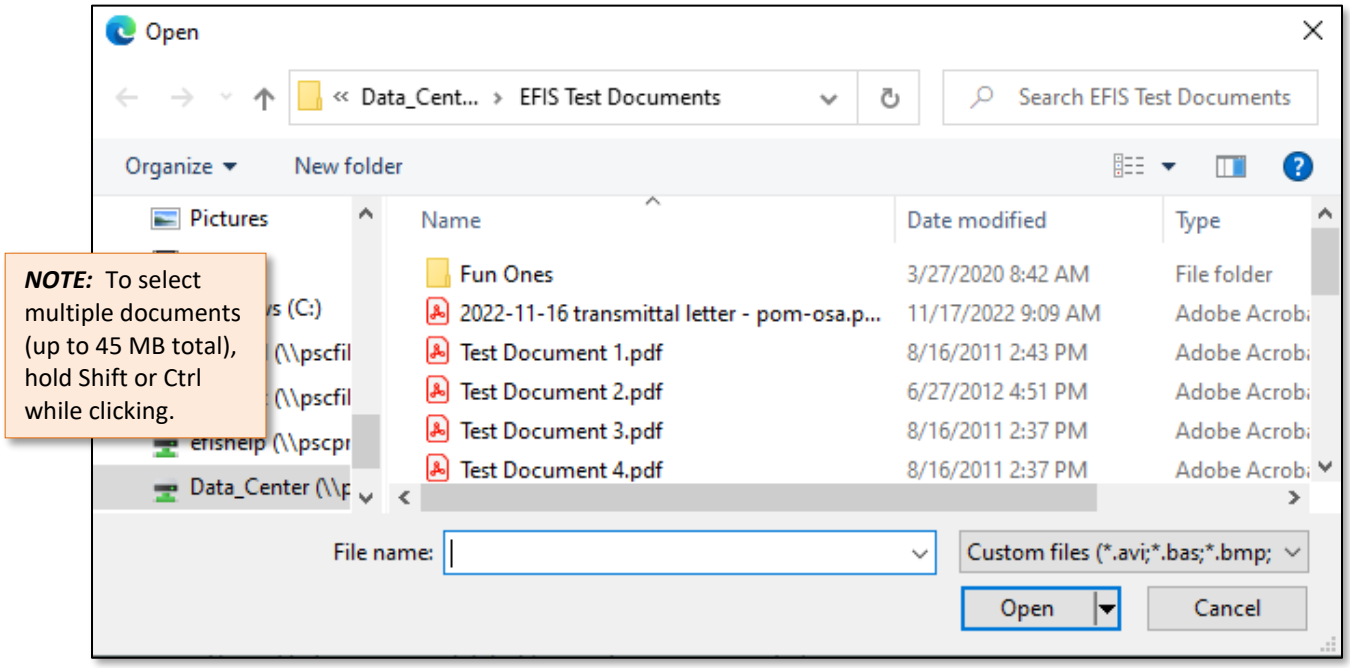
27) If additional users need to be copied in, click the **Add New** button and repeat the previous steps.



28) In the *Attachment* section, click the **Select File(s) to Upload** button to upload documents for the data request, if any.

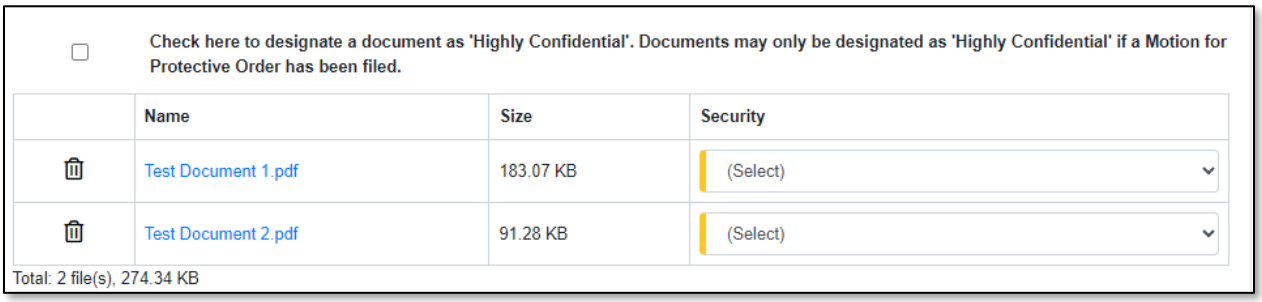


a) In the *Open Browser* window, select the document or documents to attach.

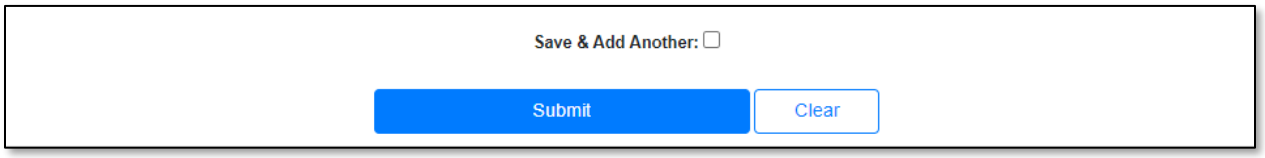


NOTE: To select multiple documents (up to 45 MB total), hold Shift or Ctrl while clicking.

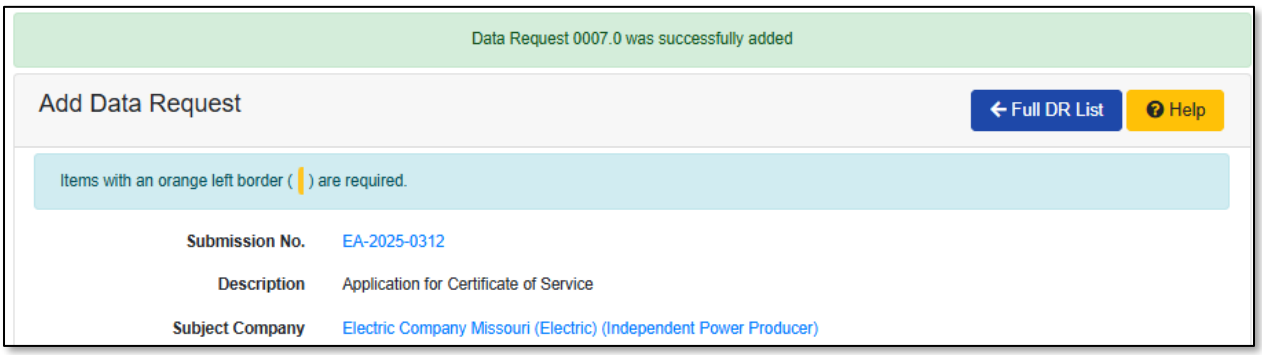
b) After selecting the document(s), users must select the security level for each document by selecting the **Security** field beside each document.
   i) If documents are deemed highly confidential, check the box above the document list labeled **Check her to designate a document…**
   ii) If the document(s) listed need to be removed, click the trash can in front of the document which needs to be removed.



29) Click the **Save & Add Another** box is users have multiple data requests to issue for the same case or non-case submission.
   a) Checking this box will auto populate certain fields according to the previous data request submission.
30) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

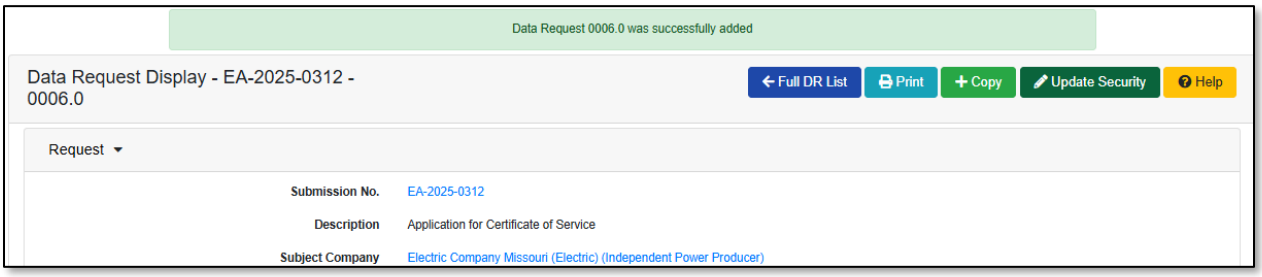


31) Once submitted, a message will be displayed at the top of the screen letting the user know the submission was successfully added.
    a) If the **Save & Add Another** check box was checked, then the user will be directed to the *Add Data Request* page.



    b) If the **Save & Add Another** check box was not checked, then the user will be directed to the *Data Request Display* page for the submission.
    c) The submitter can increase the document's security level within 14 calendar days by clicking the **Update Security** button.

> **NOTE:** Submitters can only increase a document's security level—they cannot lower it. For example, a document labeled as *Public* can be changed to *Confidential*, but to downgrade a *Confidential* document to *Public*, the submitter must contact the Data Center.



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