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## **BPA Secure Website**

### ***User Guide***

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**Bonneville Power Administration**

**October 2018**

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## **INTRODUCTION**

Bonneville's Secure Website is a document management and control application for use in BPA Proceedings. Official Parties, the Hearing Officer, and the Rate Hearing Clerk use the secure area of the Secure Website to submit and access all documents, including Exhibits, Data Requests, Data Responses, Motions, and Orders. Generally, the public has access to view all filed documents except Data Requests and Responses and certain other confidential or proprietary information.

Content and format requirements for filings submitted via the Secure Website are contained in Bonneville's Rules of Procedure. Please note that special procedural rules adopted by the Hearing Officer of a particular proceeding may contain additional filing requirements.

This document provides instructions for use of the Secure Website by Official Parties to a Bonneville proceeding.

## APPLICATION BASICS

### System Functionality

**The Secure Website allows representatives of Official Parties to:**

- Enter and submit Filings on behalf of their Party.
- Enter and send requests to another Party for information on Filings submitted by that Party.
- Respond to requests directed to their Party.
- View all Filings, Data Requests, Data Responses, and Orders.
- Receive email notification regarding the submission of Filings, Data Requests, Data Responses, and Orders.
- Receive communications from the Hearing Officer.
- Manage their user settings.

### Contacts

Some parts of the Secure Website reference the Rate Clerk. That function has been split into the Hearing Clerk, who assists the Hearing Officer, and the Rate Hearing Coordinator, who handles access to the Secure Website.

If you encounter a problem accessing the system or have log in/password problems, please contact the Rate Hearing Coordinator, whose contact information is provided in the Federal Register Notice initiating a particular proceeding.

For administrative or procedural questions, please contact the Hearing Clerk supporting the Hearing Officer, whose contact information is provided in the Federal Register Notice initiating a particular proceeding.

If you are experiencing technical problems with the BPA Secure Website, such as timing out or browser compatibility issues, please send an email to [webapplications@bpa.gov](mailto:webapplications@bpa.gov).

## BECOMING A PARTY TO A BONNEVILLE PROCEEDING

Any entity or person intending to become a party to a Bonneville proceeding must file a petition to intervene via Bonneville's Secure Website, which requires:

- 1) a filer's account;
- 2) access for that account to the proceeding in question;
- 3) a filing number; and
- 4) submission of the petition to intervene.

### New Accounts

- 1) Create an account by following the steps on pages 6-7. Included in the registration form is a request for access to a proceeding, which fulfills the second requirement above. If your party has not previously participated in a Bonneville proceeding, the Rate Hearing Coordinator will contact you to set up your party's two-letter code.
- 2) Create a filing number. For an explanation of Bonneville's filing number system, see pages 11-12 and Appendix A. To create a filing number for a petition to intervene, log in to the proceeding and select Generate a Filing Number under the Filings menu. Select the option for an original document, then choose **Official Posting** under the Upload Code and **Party Status: Letters and Documentation** under the Designation Code. The process for generating filing numbers is shown in more detail on pages 14-16. The generated filing code must be displayed in the footer of the petition.
- 3) To submit the petition to intervene, log in to the proceeding and select Submit Filing under the Filings menu. Select the upload code generated in the previous step, fill out the submission form, and upload the document. Before uploading the petition, please ensure that it meets the format and content requirements set forth in the Rules of Procedure §§ 1010.6 and 1010.11. The process for submitting documents via the Secure Website is shown in more detail on pages 16-18.
- 4) To participate in additional proceedings, follow the steps for existing accounts below.

### Existing Accounts

- 1) Request access to the new proceeding using your existing account email. The steps to request access to a new proceeding are shown on page 8.
- 2) Create a filing number (see pages 14-16) by logging into the proceeding and choosing the **Official Posting** Upload Code and **Party Status: Letters and Documentation** Designation Code. The generated filing code must be displayed in the footer of the petition.
- 3) Submit your petition to intervene. Ensure that it meets the format and content requirements set forth in the revised Rules of Procedure §§ 1010.6 and 1010.11.

## SECURE LOG IN AND ELECTRONIC SUBMISSION

### The Electronic Signature

Each account representing an Official Party to a proceeding will be assigned a password to access the Secure Website and validate the Party's identity. Once a Party has access to the system, documents may be electronically submitted into the proceeding. Consistent with a traditional handwritten signature on a paper document, an Electronic Signature is a method to sign an electronic message (Government Paperwork Elimination Act (GPEA), P. L. 105-277, Title XVII, §1709(1)). A document is electronically signed by the person whose name is on the signature block of a pleading pursuant to Rules of Procedure § 1010.11(b). The name in the pleading, the password, and clicking **Submit**, together, are considered the Party's Electronic Signature.

The Electronic Signature represents the Party's authorization to submit documents, including Exhibits, Data Requests, Data Responses, Motions, and any other Filings into the proceeding. Similar to when documents are submitted in paper form, documents submitted using the Secure Website are not considered as evidence unless admitted into evidence by the Hearing Officer. Data requests and responses are not part of the record or evidence unless moved into the record and evidence by an Official Party and admitted by the Hearing Officer.

Because the password authenticates the source of an electronic submission, it is vitally important for each Party to protect the privacy of their password so that unauthorized persons do not access the Secure Website or submit documents using the Party's account.

Parties should not include sensitive information in any document submitted through the Secure Website. Information in the document, including sensitive information, may be accessible to the public over the Internet. Refer to page 2 for filing documents under seal or for alternative filing options.

### Use of Cookies

Cookies are short text files placed on the computer's hard drive by a web site, usually without the user's knowledge. Cookies are not an executable program and do not adversely impact the computer. The Secure Website uses a session cookie to enable a Party to make filings electronically. A session cookie operates only for the duration of the browser session; when the user shuts down the browser, the cookie is released and disappears.

A Party will not be able to submit documents electronically if their browser is set to prevent any cookie from being sent to its system.

## GETTING STARTED

### Web Site Location

To access the Secure Website, enter the following URL in the **Address** bar of your browser:

<https://www.bpa.gov/secure/ratecase>

The Bonneville Secure Website screen displays:

**Rate Case Home**

- Rate Case Home
- View Documents
- Request Access
- User Guide
- Rules of Procedure

**Active Rate Cases**

For Technical Assistance, contact the BPA HELP Desk 24 hours a day at 503.230.4357 or 1.800.375.4912.

Rate Case Name	View Case Documents	Log In
2020 Transmission Terms and Conditions Tariff Proceeding	<a href="#">View Documents...</a>	<a href="#">Log In...</a>
2020 Joint Power and Transmission Rate Proceeding	<a href="#">View Documents...</a>	<a href="#">Log In...</a>

**Inactive Rate Cases**

Rate Case Name	View Rate Case Documents
2007 Power Wholesale Rate Case (including 2007 Supplemental Rate Case: beginning date 02-19-08)	<a href="#">View Documents...</a>
2008 Transmission Rate Case	<a href="#">View Documents...</a>
2008 Power Tiered Rate Methodology Rate Case	<a href="#">View Documents...</a>

From this screen you can view documents associated with various active and inactive proceedings. To access “read-only” copies of the documents associated with a particular proceeding, select the **View Documents** link that is located to the right of the case title.

### Active Rate Cases

Rate Case Name	View Case Documents	
2001 Transmission Test Rate Case	<a href="#">View Documents...</a>	Lo
2010 Power Test Wind Rate Case	<a href="#">View Documents...</a>	Lo
2055 Transmission Some Rate Case	<a href="#">View Documents...</a>	Lo

### Filing List

Rate Case:

Upload Code:

No Documents matching these selections were found

You are viewing page 1 of 0

A screen similar to this one will display, where you can filter for documents by proceeding name and Upload Code.

## CREATE A USER ACCOUNT

For full access to the Secure Website, you must create a user account.

- 1) At the Rate Case Home page, click the **Request Access** link in the left navigation bar. The following screen displays:

**Rate Case Home** ▶ **Request Access**

- Rate Case Home
  - View Documents
  - Request Access

**New Users:**  
If you have never used this system and would like to request access to a particular rate case, click the 'Create New Account' button below.

Create New Account Cancel

**Returning Users:**  
If you have used this system before and would like to access a new rate case, click the 'Request Rate Case Access' button below.

Request Case Access Cancel

- 2) Click the **Create New Account** button. The following screen displays:

**Account Information**  
User Information  
Contact Information  
Confirm Information  
Account Completed

Email:

Password:   
(at least 7 characters long of which at least one character must be non-alphanumeric (\*&%\$#@!))

Confirm Password:

Security Question:

Security Answer:

Previous Next Cancel

- 3) Fill in the fields and click the **Next** button. The following displays:

**Account Information**  
**User Information**  
Contact Information  
Confirm Information  
Account Completed

First:

MI:

Last:

Company:

Profession:

Requested Case: Select Rate Case... ▼

Previous Next Cancel



- 4) Fill in the fields. Select the active proceeding to which you are requesting access from the **Requested Case** drop-down list. Then, click the **Next** button. The following screen appears:

Account Information User Information **Contact Information** Confirm Information Account Completed

Address:

City:

State:

Zip:

Phone:

Fax:

- 5) Fill in the fields (the phone number must be in the format XXX-XXX-XXXX) and select Next. A summary screen displays showing the information you have provided:

Account Information User Information Information **Confirm Information** Account Completed

<b>Email:</b>	rateclerk@bpa.gov
<b>Question:</b>	What's your secret
<b>Answer:</b>	It's a secret
<b>Rate Case:</b>	2020 Joint Power and Transmission Rate Proceeding
<b>First Name:</b>	Rate
<b>MI:</b>	
<b>Last Name:</b>	Clerk
<b>Company:</b>	BPA
<b>Profession:</b>	Rate Clerk
<b>Address:</b>	905 NE 11th Avenue
<b>City:</b>	Portland
<b>State:</b>	OR
<b>Zip Code:</b>	97232
<b>Phone:</b>	503-230-3000
<b>Fax:</b>	

- 6) Click the **Finish** button. The following screen displays:

**Account Created!**

You will be contacted via email when your request has been evaluated by the Rate Clerk.

[Return to the Rate Case Home](#)

## REQUEST ACCESS TO A PROCEEDING

To request access to a proceeding if you already have a user account:

- 1) At the Secure Website Home page, click on the **Request Access** link in the left navigation bar. The following screen displays:

Rate Case Home ▶ Request Access

<ul style="list-style-type: none"><li>■ Rate Case Home</li><li>■ View Documents</li><li>■ Request Access</li></ul>	<p><b>New Users:</b> If you have never used this system and would like to request access to a particular rate case, click the 'Create New Account' button below.</p> <p><input type="button" value="Create New Account"/> <input type="button" value="Cancel"/></p>	<p><b>Returning Users:</b> If you have used this system before and would like to access a new rate case, click the 'Request Rate Case Access' button below.</p> <p><input type="button" value="Request Case Access"/> <input type="button" value="Cancel"/></p>
--	---	---

- 2) Click the **Request Case Access** button. The following screen displays:

Email:

Requested Case:

- 3) Enter the email address associated with your existing account in the **Email** field.
- 4) Select the active proceeding to which you want access from the **Requested Case** drop-down list and click **Finish**. The following screen displays:

**Account Updated!**

You will be contacted via email when your request has been evaluated by the Rate Clerk.

[Return to the Rate Case Home](#)

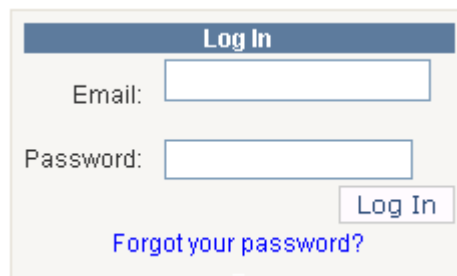
## LOGGING IN

Enter the secure log in area by clicking on the **Log In...** link located to the far right of the active proceeding title on the home page.

### Active Rate Cases

Rate Case Name	View Case Documents	Log In
2001 Transmission Test Rate Case	<a href="#">View Documents...</a>	<a href="#">Log In...</a>
2010 Power Test Wind Rate Case	<a href="#">View Documents...</a>	<a href="#">Log In...</a>
2055 Transmission Some Rate Case	<a href="#">View Documents...</a>	<a href="#">Log In...</a>

Under the Log In window, enter your email address and password then click the **Log In** button.



The image shows a 'Log In' window with a title bar. Below the title bar, there are two input fields: 'Email:' and 'Password:'. To the right of the 'Password:' field is a 'Log In' button. Below the input fields is a link that says 'Forgot your password?'. A red arrow from the 'Log In...' link in the table above points to this window.

After you log in, the **Change Party** screen displays if you are a member of more than one Official Party and/or Joint Party. From here, select the Party you wish to log in under. For this example, we will choose **BPA** by clicking on the word **Select** next to the BPA Party Code.

[Rate Case Home](#) > [Secure Filings Home](#) > [Account](#) > [Change Party](#) Welcome

- Rate Case Home
  - View Documents
  - Request Access
- Secure Filings Home
  - Filings
  - Discovery
  - Account

Party Code	Party Name
Select BPA	Bonneville Power Administration
Select JP1	Joint Party 1
Select JP2	Joint Party 2
Select Newester P	NWRP

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If you believe information on this site is missing or in error, please [Submit that comment here.](#)

The **Secure Filings Home** screen displays your name and the selected Party name in the upper right corner of the screen.

Rate Case Home ▶ Secure Filings Home

Welcome User | Logout  
Member of: **Bonneville Power Administration**

### BPA Rate Case Filing System

**Activity At A Glance:**  
As of Tuesday, October 23, 2007 3:17 PM:

BPA and Party Filings	8
Unanswered Data Requests:	8
Total Data Requests:	9

**My Party's Activity:**  
Activity for Bonneville Power Administration:

BPA and Party Filings	8
Unanswered Data Requests:	8
Total Requests Submitted:	0
Total Requests Received:	9

## Log In Difficulties

If you experience problems logging in (see below), or you feel that you do not have the permissions you need, contact the Rate Hearing Coordinator (refer to “[Contacts](#)”, page 2).

**Log In**

Email:

Password:

[Forgot your password?](#)

You do not have permission to submit filings to this rate case. Please contact the rate clerk.

## Logging Out

To logout of the Secure Website, click on the **Logout** link located at the top right of the screen. You will be returned to the main log in screen. Or, you can close Internet Explorer to exit the BPA Secure Website.

Advanced Search

Welcome, User Name | [Logout](#)

You can only be logged into one proceeding at a time. If you are participating in multiple contemporaneous proceedings, you need to log out of one proceeding in order to log into a different one using the steps above.



## Returning to the Secure Filings Home Page

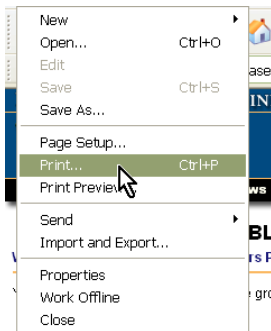
To return to the Secure Filings Home page from any secure screen, do one of the following:

**Note:** Remember that the **Rate Case Home** link takes you to the primary home page of the entire BPA Secure Website.

Click on the **Secure Filings Home** link in the left navigation bar.



## Printing with Secure Website



To print documents from the Secure Website, open the document. Then, go to **File** on the toolbar and select **Print (Ctrl+P)**.

The Secure Website also allows you to print screen views. Display the desired screen and select **Print (Ctrl+P)** on the toolbar.

## READING DOCUMENT AND DATA REQUEST CODES

### Filing Codes

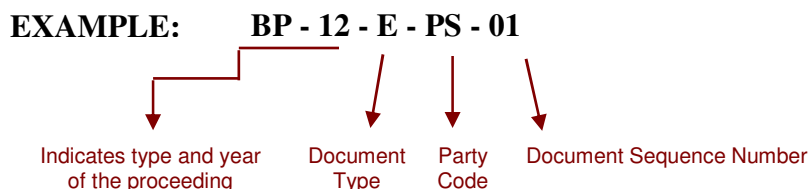
The Secure Website uses Filing Codes established through an Order by the Hearing Officer for all Filings, Data Requests, Data Responses and Orders.

Contact the Hearing Clerk for all questions concerning Filing Codes (refer to "[Contacts](#)," page 2).

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### Single Party Submissions

Filing Codes for documents are structured as follows:



The above Filing Code shows that:

- (a) The document is for the 2012 Joint Power and Transmission Rate Proceeding (BP-12).
- (b) The type of document being submitted is an Exhibit (E).
- (c) The party submitting the Exhibit is Power Services (PS).
- (d) This is the first Exhibit submitted by PS (01).

The Filing Code for a Motion would read: **BP - 12 - M - PS - 01**.

The Filing Code for an Order would read: **BP - 12 - HOO - 01**.

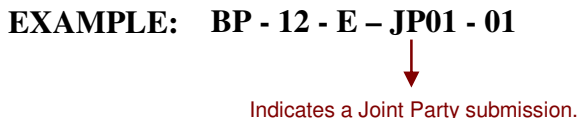
(Non-Party filings such as Hearing Officer Orders have no Party code.)

**Note:** Document sequence numbers for all Filings, Orders, Data Requests and Data Responses are automatically generated by the Secure Website. Please refer to **Generate Filing Number** on page 14.

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### Joint Party Submissions

If a Filing is submitted jointly, the Filing Code will show the Code **JP** indicating Joint Party. See the procedural rule regarding joint submissions.



### Filings with Multiple Volumes

If a Filing has multiple volumes, a designation of “V01”, “V02”, “V03”, and so forth, will follow the document sequence number.

**EXAMPLE: BP - 12 - E - BPA - 04 - V02**



Indicates this is the second volume of the fourth exhibit submitted.

---

### Errata Submissions

Errata, which are generally submitted separately from the original Filing, will have a designation of “E01,” “E02,” and so forth that will follow the document sequence number.

**EXAMPLE: BP - 12 - E - BPA - 04 - E01**

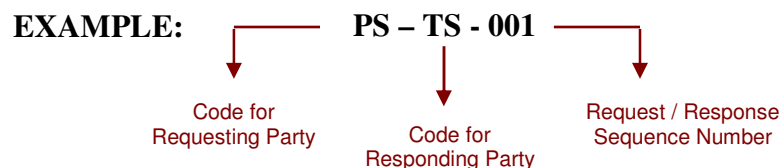


Indicates this is the first erratum of the fourth exhibit submitted

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### Data Request and Response Codes

Data Request and Data Response Codes are automatically generated by the Secure Website according to the following structure:



The above Code for a data request shows that:

- (a) The Requesting Party is PS.
- (b) The request is directed to the Responding Party TS.
- (c) This is the first consecutive request/response sequence number (001) submitted by PS to TS.

**Note:** Although the Data Response Code is always the same as the Data Request Code, email notifications clearly indicate whether the email is a Data Request or a Data Response. All parties have access to all requests and responses.

For a complete list of document designation codes, refer to “[Appendix A – Document Designation Codes](#),” page A-1.

## FILINGS

### Secure Filings Home Menu

Upon log in, the Secure Filings Home menu appears as shown on the left of the screenshot below. From this location you can access screens to perform all filing and discovery activities.

### View Filings

To view Filings, do the following:

- 1) Click on the **Filings** link (not the plus (+) symbol next to it) in the left navigation bar. The following screen displays:

### Steps To Submit A New Filing:

1. [Generate a Filing Number](#) (Filing --> Generate a Number)
2. Paste the generated number into your document in the appropriate locations (cover page, footers, headers, etc.)
3. [Upload the filing](#) (Filing --> Submit Initial Filing)
4. Filing information is saved, and a link is sent to all parties

### Steps To Submit Subsequent Volumes, Conformed Versions, Errata, Corrections To Errata:

1. [Generate a Secondary Filing Number](#) (Filing --> View My Filings) Click the 'Submit Secondary Filing' link next to the desired original document
2. Paste the generated number into your document in the appropriate locations (cover page, footers, headers, etc.)
3. [Submit Secondary Filings](#) (Filing --> Submit Secondary Filings)
4. Select the original filing's upload code from the drop-down. If you are submitting a correction to an errata, select that errata's filing code. For all others, select the original filing code
5. Enter volume, errata, correction to errata information, or mark the filing as a conformed copy
6. Upload the filing by clicking the 'Submit' button at the bottom of the Submit Secondary Filings page
7. Filing information is saved, and a link is sent to all Parties



- Click on the **View All Filings** link at the top middle of the screen.

#### Filing List

Party:

Upload Code:

Filing Code	Filing Title	Filing Type	Party	Date Filed	Upload Secondary Filing
TRC-01-E-BPA-1	<a href="#">Text Exhibit2</a>	BPA and Party Filings Exhibits, Studies, Testimony, Affidavits	Bonneville Power Administration	10/17/2007 12:12 PM	<a href="#">Add Secondary Filing...</a>
TRC-01-E-BPA-2		BPA and Party Filings Exhibits, Studies, Testimony, Affidavits	Bonneville Power Administration	10/16/2007 2:14 PM	<a href="#">Add Secondary Filing...</a>

## Generate Filing Number

To generate a Filing Number for an original filing:

- Log In to the proceeding for which you want to generate a Filing Number.
- The Change Party screen displays instead if you are representing multiple parties. In that case, click the **Select** link next to the name of the Party that is filing the document. For this example, we will select **BPA**.
- Expand the **Filings** heading in the navigation bar on the left by clicking on the plus (+) symbol.
- Click the **Generate a Filing Number** link. The following screen displays:

### Generate A Filing Number (Step 1)

<ul style="list-style-type: none"> <li>The document I am filing is an <b>original</b> document, and</li> <li>It is a <b>single-volume</b> filing, or the <b>first volume</b> in a multiple-volume filing.</li> </ul> <p>If <b>both</b> of the above are true click the button below:</p> <p><input type="button" value="Continue..."/></p>	<ul style="list-style-type: none"> <li>The document I am filing is an <b>errata</b> to an existing filing, or</li> <li>The document is a <b>conformed copy</b> of an original, or</li> <li>The document is a <b>correction</b> to an existing <b>errata</b>, or</li> <li>The document is a <b>second</b> or higher volume in a <b>multi-volume</b> filing, or</li> <li>The document is an <b>attachment</b> to an existing filing, or</li> <li>The document is an <b>appendix</b> to an existing filing.</li> </ul> <p>If <b>any</b> of the above are true click the button below:</p> <p><input type="button" value="Continue..."/></p>
--	--

- 5) Click the **Continue** button on the **left**. The following screen displays:

### **Generate A Filing Number (Step 1)**

---

Party Code*:	BPA
Upload Code*:	Select Upload Code ▼
Volume?*	Check to indicate that this filing is the first volume in a multi-volume filing. <input type="checkbox"/>

- 6) Click on the down-arrow next to the **Upload Code** field and select an Upload Code from the drop-down list. A screen similar to the following displays:

Party Code*:	BPA
Upload Code*:	BPA and Party Filings ▼
Designation Code*:	Select Designation Code ▼
Volume?*	Check to indicate that this filing is the first volume in a multi-volume filing. <input type="checkbox"/>

- 7) Click on the down-arrow next to the **Designation Code** field and select a Code from the drop-down list (refer to [Appendix A](#) for a description of all the designation codes). A screen similar to the following displays:

Party Code*:	BPA
Upload Code*:	BPA and Party Filings ▼
Designation Code*:	Exhibits, Studies, Testimony, Affidavits ▼
Volume?*	Check to indicate that this filing is the first volume in a multi-volume filing. <input type="checkbox"/>

- 8) If this is the first volume in a multi-volume Filing, click in the box next to **Volume**. If there are no volumes with the Filing, leave the box blank.
- 9) Click the **Get My Filing Number** button. The Filing number displays as follows:

The next available filing number for your party is:

**TRC-01-E-BPA-2**

Copy and paste this number into the footer of your document. This number has been reserved for your Party in the Secure Website system and will need to be included on each page of the document in order to be properly filed. When you are ready to file the document, select **Filings/Submit Filing** in the left navigation bar, then select this number from the **Select Upload Code** drop-down list.

## Submitting a Filing Document

To submit a Filing Document:


- 1) Log In to the proceeding for which you want to submit a Filing Document.
- 2) If you represent multiple parties, the Change Party screen displays. File a document on behalf of a specific Party by clicking the **Select** link next to that Party's Code. For this example, we will select **BPA**.
- 3) Expand the **Filings** heading in the left navigation bar by clicking on the plus (+) symbol.
- 4) Click the **Submit Filing** link. The following screen displays:

### Submit Filing

---

Select the upload code of the document you wish to file from the list of codes reserved for your party below:

Reserved  
Upload Codes:

Select Upload Code to File 

- 5) Select the Filing Number reserved for your filing from the drop-down list (this is the number you generated in the Generate Filing Number steps above). A screen similar to the following displays:

Select the upload code of the document you wish to file from the list of codes reserved for your party below:

Reserved Upload Codes:

Please fill in the information below to complete your filing.

Filing Title:\*  \*

# of Pages:\*  \*

Contact Email:

Related Filings:

Upload Document:\*

If all the **required** information has been entered in the above form, when you click the button below your information will be electronically signed and submitted on your behalf to all official parties.

**Note:** The amount of time required for the web server to process your submittal will depend on the size of any upload file and the speed of your internet connection.

- 6) Fill in the fields.  
**Note:** Fields with an asterisk (\*) next to them are required.
- 7) Click the **Browse** button and select the saved document you want to submit.
- 8) Select the file and click **Open**.

- 9) Click the **Click to Electronically Sign and File** button. The following screen displays:

Select the upload code of the document you wish to file from the list of codes reserved for your party below:

Reserved Upload Codes:

**Filing TRC-01-E-BPA-3 successfully filed.**

An email similar to the following is sent to you and the address specified in the **Contact Email** field:

**2001 Test Rate Case - Notice of E-Filed BPA and Party Filing**

BPA Rate Case

To: BPA Rate Case

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This is an automated message from the Bonneville 2001 Test Rate Case Website:  
<https://securedev.bpa.gov/RateCase>

PLEASE DO NOT RESPOND TO THIS EMAIL.

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To the Official Parties of the 2001 Test Rate Case:

Notice of Receipt of e-Filing with the Hearing Officer:

Participant Filing Date: 10/17/2007 2:28 PM

Participant Filing Number: TRC-01-E-BPA-3

Participant Filing Name: Test Spreadsheet2

Signed by: - Bonneville Power Administration

Filed by: :

Click here to view the Party Filing:  
<https://securedev.bpa.gov/RateCase/openfile.aspx?fileName=Test+Spreadsheet2.xls&contentType=application%2fvnd.ms-excel>

After you submit the filing, you are returned to the screen in the previous step. If you have created multiple filing numbers, you can select a different filing number from the drop-down list and submit a different document under that number by repeating Steps 6 through 9.

## Generate Secondary Filing Number

Use this procedure to generate a Secondary Filing Number if one of the following is true.

The document is:

- An erratum to an existing Filing.
- A conformed copy of an original.
- A correction to an existing erratum.
- A second or higher volume in a multi-volume Filing.
- An attachment to an existing Filing.
- An appendix to an existing Filing.

To generate a Secondary Filing Number:

- 1) Log In to the Rate Case for which you want to generate a Secondary Filing Number.
- 2) If you represent multiple parties, the Change Party screen displays. Select the Party for which you want to generate a Filing Number by clicking the **Select** link next to the Party Name.
- 3) Expand the **Filings** heading in the left navigation bar by clicking on the plus (+) symbol.
- 4) Click on the **Generate Filing Number** link. The following screen displays:

### Generate A Filing Number (Step 1)

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<ul style="list-style-type: none"><li>• The document I am filing is an <b>original</b> document, and</li><li>• It is a <b>single-volume</b> filing, or the <b>first volume</b> in a multiple-volume filing.</li></ul>	<ul style="list-style-type: none"><li>• The document I am filing is an <b>errata</b> to an existing filing, or</li><li>• The document is a <b>conformed copy</b> of an original, or</li><li>• The document is a <b>correction</b> to an existing <b>errata</b>, or</li><li>• The document is a <b>second</b> or higher volume in a <b>multi-volume</b> filing, or</li><li>• The document is an <b>attachment</b> to an existing filing, or</li><li>• The document is an <b>appendix</b> to an existing filing.</li></ul>
If <b>both</b> of the above are true click the button below:	If <b>any</b> of the above are true click the button below:
<input type="button" value="Continue..."/>	<input type="button" value="Continue..."/>

- 5) Click on the **Continue** button on the **right**. A screen similar to the following displays:

Filing Code	Filing Title	Filing Type	Party	Date Filed	Upload Secondary Filing
TRC-01-E-BPA-1	<a href="#">Text Exhibit2</a>	BPA and Party Filings Exhibits, Studies, Testimony, Affidavits	Bonneville Power Administration	10/17/2007 12:12 PM	<a href="#">Add Secondary Filing...</a>
TRC-01-E-BPA-2		BPA and Party Filings Exhibits, Studies, Testimony, Affidavits	Bonneville Power Administration	10/16/2007 2:14 PM	<a href="#">Add Secondary Filing...</a>
TRC-01-E-BPA-4	<a href="#">Text Exhibit3</a>	BPA and Party Filings Exhibits, Studies, Testimony, Affidavits	Bonneville Power Administration	10/17/2007 12:43 PM	<a href="#">Add Secondary Filing...</a>

- 6) Click on the **Add Secondary Filing** link on the line containing the Filing to which you want to add a Secondary Filing. A screen similar to the following displays:

**Generate Secondary Filing Number**

Filing Code: TRC-01-E-BPA-1

Secondary Type\*:

- 7) Select a Secondary Type from the drop-down list. The following Secondary Types (and their abbreviations) are listed:

- Appendix (AP)
- Attachment (AT)
- Conformed Copy (CC)
- Correction to Erratum (CE)
- Erratum (E)
- Volume (V)

A screen similar to the following displays:

Filing Code:	TRC-01-E-BPA-1	
Secondary Type*:	<input type="text" value="Attachment"/>	
Number Options:	<input type="radio"/> TRC-01-E-BPA-1-AT1 <input type="radio"/> TRC-01-E-BPA-1-AT1(1)	Select the first option if this filing is a new filing of the selected type. Select the second option if this is part of a multi-document filing (i.e. a very large document).

- 8) Select the desired Number Option and click the **Reserve My Filing Number** button.

**Note:** Read the descriptions to the right of the options to ensure you select the correct option.

- 9) A screen similar to the following displays:

**Filing Number TRC-01-E-BPA-1-AT1 was saved for your party.**

Filing Code:	TRC-01-E-BPA-1
Secondary Type*:	<input type="text" value="Select Type..."/>
The Filing Number You Selected Was:	
<b>TRC-01-E-BPA-1-AT1</b>	
<ul style="list-style-type: none"><li>• Copy Number</li><li>• Paste Into Document (or write it down for later)</li><li>• Click "Reserve My Filing" Button</li></ul>	

Copy this number and paste it into your document. This number has been reserved for your Party. When you are ready to file the document under this number, see [Submitting a Filing Document](#) on page 16.



## DISCOVERY

### View Discovery

To view all data requests and responses, click on the Discovery link (not the plus (+) symbol next to it) in the left navigation bar. The following screen displays:

#### Data Request And Response List

**Data Request and Response view:**

All Requests
  Answered Requests
  Unanswered Requests

Response is past due after seven (7) days.

Request (click to view)	Exhibit	Requesting Party	Responding Party	Date Filed	Response (click to view)
<a href="#">ATP-BPA-1</a>	TRC-01-E-BPA-3	A Test Party	Bonneville Power Administration	10/23/2007 9:12 AM	<a href="#">Create Response</a> Due by 10/30/2007
<a href="#">ATP-BPA-2</a>	TRC-01-E-BPA-5	A Test Party	Bonneville Power Administration	10/23/2007 9:15 AM	<a href="#">Create Response</a> Due by 10/30/2007
<a href="#">ATP-BPA-3</a>	TRC-01-E-BPA-4	A Test Party	Bonneville Power Administration	10/23/2007 9:16 AM	<a href="#">Create Response</a> Due by 10/30/2007
<a href="#">ATP-BPA-4</a>	TRC-01-E-BPA-1-AT1	A Test Party	Bonneville Power Administration	10/23/2007 9:17 AM	<a href="#">Create Response</a> Due by 10/30/2007
<a href="#">ATP-BPA-5</a>	TRC-01-E-BPA-1-AT1	A Test Party	Bonneville Power Administration	10/23/2007 9:18 AM	<a href="#">Create Response</a> Due by 10/30/2007

1 2

You are viewing page 1 of 2

Requests are listed in ascending order by date of submission. Use the radio buttons, Party dropdown, or the search function to filter the list as needed:

#### Data Request And Response List

**Data Request and Response view:**

Requesting Party:  ▼

All Requests
  Answered Requests
  Unanswered Requests

Items Per Page:

10 ▼

Search Filings:(Request or Exhibit)

## Submit a Data Request

The Secure Website allows an Official Party to submit Data Requests to another Party regarding any Filing the other Party has submitted. To submit a Data Request:

- 1) Expand the **Discovery** heading in the left navigation bar by clicking on the plus (+) symbol.
- 2) Click the **Submit Data Request** link. The Submit Data Request form displays: (An asterisk (\*) indicates the field is required for submittal.)

### Submit Data Request

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Filing\*:

Page Number(s)\*:

Line Number(s)\*:

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**Select preferred method of request submission:**

Upload request file  Complete online request form

- 3) Select a Filing number from the **Filing** drop-down list.
- 4) Enter the **Page Number(s)** and **Line Number(s)** that the request concerns. Numeric entries may be both consecutive and non-consecutive.
- 5) Select a preferred method of request:
  - If you select **Upload request file**, the following screen displays:

### Submit Data Request

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Filing\*:

Page Number(s)\*:

Line Number(s)\*:

---

**Select preferred method of request submission:**

Upload request file  Complete online request form

Upload Document:\*

Browse to the document you prepared that contains the data request and then click the **Submit Request** button.

- If you select **Complete online request form**, the following screen displays:

The screenshot shows a web form with the following elements:

- Filing\*:** A dropdown menu with "Select Filing" selected.
- Page Number(s)\*:** A text input field.
- Line Number(s)\*:** A text input field.
- Select preferred method of request submission:** Two radio buttons: "Upload request file" (unselected) and "Complete online request form" (selected).
- Request (paste text here)\*:** A large text area for pasting the request text.
- For questions regarding this request please submit the following information:** A section with a note: "(NOTE: A technical contact is optional; however if you do submit a technical contact, all fields are required.)".
- Name:** A text input field.
- Telephone:** Three text input fields for area code, number, and extension.
- Email:** A text input field.
- Submit Request:** A button at the bottom of the form.

Fill in the fields, and click the **Submit Request** button to send the data request.

**Note:** The data request is automatically directed to the Official Party that submitted the Exhibit.

**After you submit a data request, the Secure Website will:**

- Assign a Data Request Code to the request.
- Return you to the Home page and notify you that the request has been submitted:

**Thank you. Your request was submitted to all official parties.**

- Email the request to all Official Parties and any alternate contacts.

**Note:** If you receive a time out or other error message when submitting a data request, please do not refresh the page or click the back button to submit the request again, as this can lead to multiple identical requests. Instead, please check the list of data requests first to see if your data request was successfully submitted.

## Responding to a Data Request

Although all Parties are notified about and can view every Data Request, only the Party to which the request is directed should submit a response. This should be the same Party that submitted the Exhibit referred to in the request.

To enter and submit a response to a Data Request:

- 1) Expand the **Discovery** heading in the left navigation bar by clicking on the plus (+) symbol.
- 2) Click the **Respond to a Data Request** link. The following screen displays:

### Respond To A Data Request

Select Request\*:

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**Select preferred method of response submission:**

Upload response file  Complete online response form

- 3) Select a Request from the **Select Request** drop-down list. A screen similar to the following displays:

Select Request\*:

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**Request Detail**

**Request ID:** ATP-BPA-9 **Contact Name:**  
**Page Number:** 1 **Contact Phone:**  
**Line Number:** 1 **Contact Email:**  
**Exhibit Filing:** [TRC-01-E-BPA-1-AT2](#)  
**Request Text:**  
My question.

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**Select preferred method of response submission:**

Upload response file  Complete online response form

- 4) Select a preferred method of response:
- If you select **Upload response file**, the following screen displays:

The screenshot displays a web form with the following elements:

- A dropdown menu labeled "Select Request\*" with the value "ATP-BPA-9" selected.
- A section titled "Request Detail" with a horizontal line below it.
- Request information: "Request ID: ATP-BPA-9", "Page Number: 1", "Line Number: 1", and "Exhibit Filing: TRC-01-E-BPA-1-AT2".
- Contact information: "Contact Name:", "Contact Phone:", and "Contact Email:".
- Request text: "Request Text: My question."
- A section titled "Select preferred method of response submission:" with two radio buttons: "Upload response file" (selected) and "Complete online response form".
- An "Upload Document:\*" label followed by a text input field, a "Browse..." button, and an "Add File..." button.
- A section titled "Uploaded Files" below the input fields.

- Do the following:
- a) Click the **Browse** button and browse to the file.
  - b) Select the file and then click the **Open** button.
  - c) Click the **Add File** button.
  - d) Click the **Submit Response** button.

- If you select **Complete online response form**, the following screen displays:

Select Request\*: ATP-BPA-9

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**Request Detail**

**Request ID:** ATP-BPA-9  
**Page Number:** 1  
**Line Number:** 1  
**Exhibit Filing:** [TRC-01-E-BPA-1-AT2](#)  
**Request Text:**  
My question.

**Contact Name:**  
**Contact Phone:**  
**Contact Email:**

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**Select preferred method of response submission:**

Upload response file  Complete online response form

Response (paste text here)\*:

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**For questions regarding this response please submit the following information:**  
(NOTE: A technical contact is optional; however if you do submit a technical contact, **all** fields are required.)

Name:

Telephone:

Email:

Fill in the response fields and click the **Submit Response** button to send the response. (This action is considered to be an Electronic Signature.)

**After you submit a data response, the Secure Website will:**

- a) Return you to the Home page and notify you that the response has been served (see below).
- b) Email the response, including links, to all Official Parties.

**Respond To A Data Request**

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**Thank you.  
Your response  
to data request  
ATP-BPA-9 was  
submitted to all  
official parties.**

Select Request\*:

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**Select preferred method of response submission:**

Upload response file  Complete online response form

You can submit another response to a different request by selecting the **Request** from the **Select Request** drop-down list and repeating Step 4 above.

**Note:** If a response has been filled out, but not sent, and you select a different request to answer, you will lose all previous inputs on the Submit Data Response Form.

You can submit supplemental responses to already-answered data requests by selecting the request and following the previous steps again.

## Appendix A – Document Designation Codes

Please contact the Rate Case Clerk for all questions concerning document codes (refer to [“Contacts,”](#) page 2).

Code	Document
<b>A</b>	Final Documents (Draft Record of Decision, Administrator's Final Record of Decision, Hearing Officer's Certification of the Record)
<b>B</b>	Initial Briefs
<b>E</b>	Exhibits (Initial Studies, Initial Studies Documentation, Testimony, Rebuttal Testimony, Surrebuttal Testimony, and Cross-Examination Exhibits)
<b>FR</b>	Federal Register Notices
<b>FS</b>	Final Studies and Final Studies Documentation
<b>H</b>	Hearing Schedule
<b>I</b>	Indices
<b>M</b>	Procedural Matters (Motions to Strike, Responses, Notices, and Memoranda)
<b>O</b>	Orders
<b>P</b>	Pre-Hearing Briefs
<b>PR</b>	Informational Mailings
<b>Q</b>	Qualification Statements
<b>R</b>	Briefs on Exceptions
<b>S</b>	Party Status (Petitions to Intervene, Letters and Documentation)
<b>TA</b>	Transcripts of Oral Arguments
<b>TB</b>	Transcripts of Field Hearings
<b>TE</b>	Transcripts of Cross Examinations
<b>TPH</b>	Transcript of Pre-Hearing Conference
<b>W</b>	Public Comments and Reply Comments