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# Portal Overview Training Document

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**Activities & Discovery System  
Oregon Public Utility Commission**

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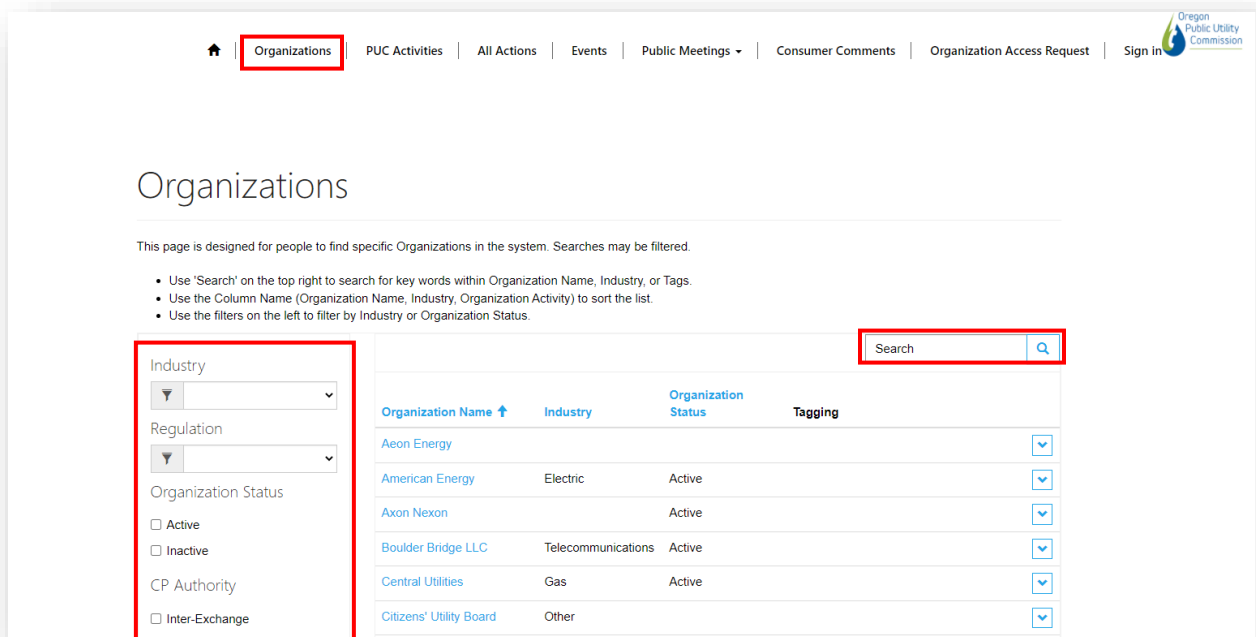
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## Introduction

To access the OPUC Activity and Discovery Test Portal, navigate to <https://puc-ads-test.powerappsportals.us/>



The **Organizations** tab allows users to view a list of all Organizations. Here you can **filter** and **search** the records to you desire.



The **PUC Activities** tab provides a list of PUC Activity (Docket) records. Here, users can filter the PUC Activity records based off status, organization, and date range. Click on a record to open it.

This page is designed for people to find specific PUC Activity in the system. Searches may be filtered:

- Use Search on the top right to search for key words within the PUC Activity Number, PUC Activity Name, Status, Tags, Created On.
- Use the Column Name (PUC Activity Number, PUC Activity Name, Status, Created On) to sort the list.
- Use the filters on the left to filter by PUC Activity Status, Organization (initiating the PUC Activity), and Date Range
  - Use Search on the top right to search for key words within the PUC Activity Number, PUC Activity Name, Status, Tags, Created On.
  - Use the Column Name (PUC Activity Number, PUC Activity Name, Status, Created On) to sort the list.
  - Use the filters on the left to filter by PUC Activity Status, Organization (initiating the PUC Activity), and Date Range

PUC Activity Number	PUC Activity Name	PUC Activity Status	Tags	Created On
AR-01070	Administrative Ruling	Open		3/7/2022 10:14 AM
EA-01069		Open		3/6/2022 9:50 PM
UII-01068		Open		3/6/2022 7:47 PM
EA-01067	PUC v Sylhet Energy	Open		3/6/2022 6:39 PM
UII-01066	Affiliated Demo	Open		3/6/2022 6:35 PM

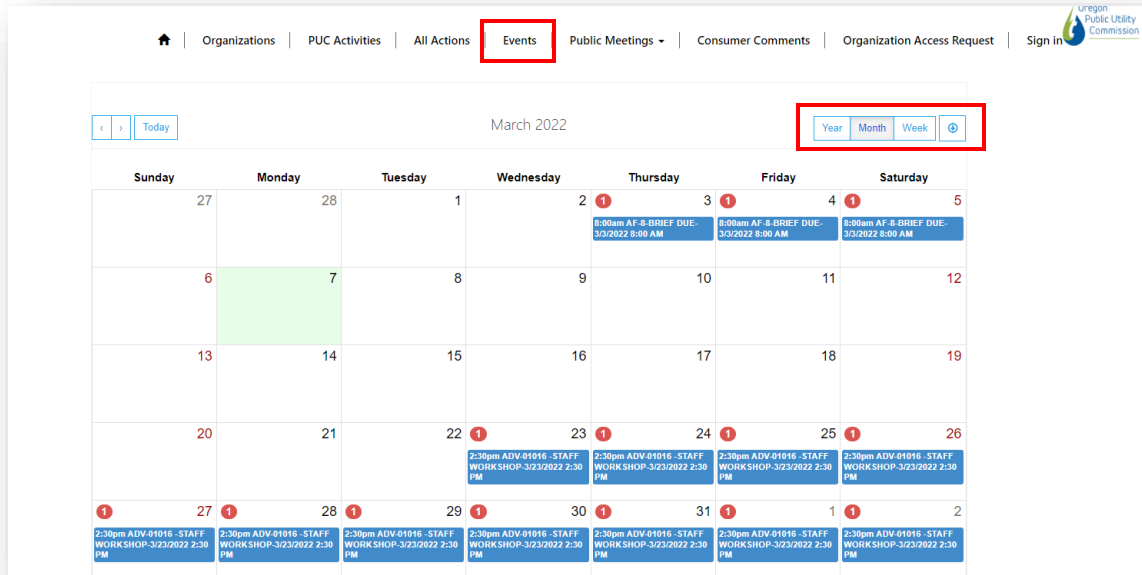
The **All Actions** tab allows users to view all Action records in ADS and filter their search. Click on a record to open it.

This page is designed for people to find specific Actions in the system. Searches may be filtered:

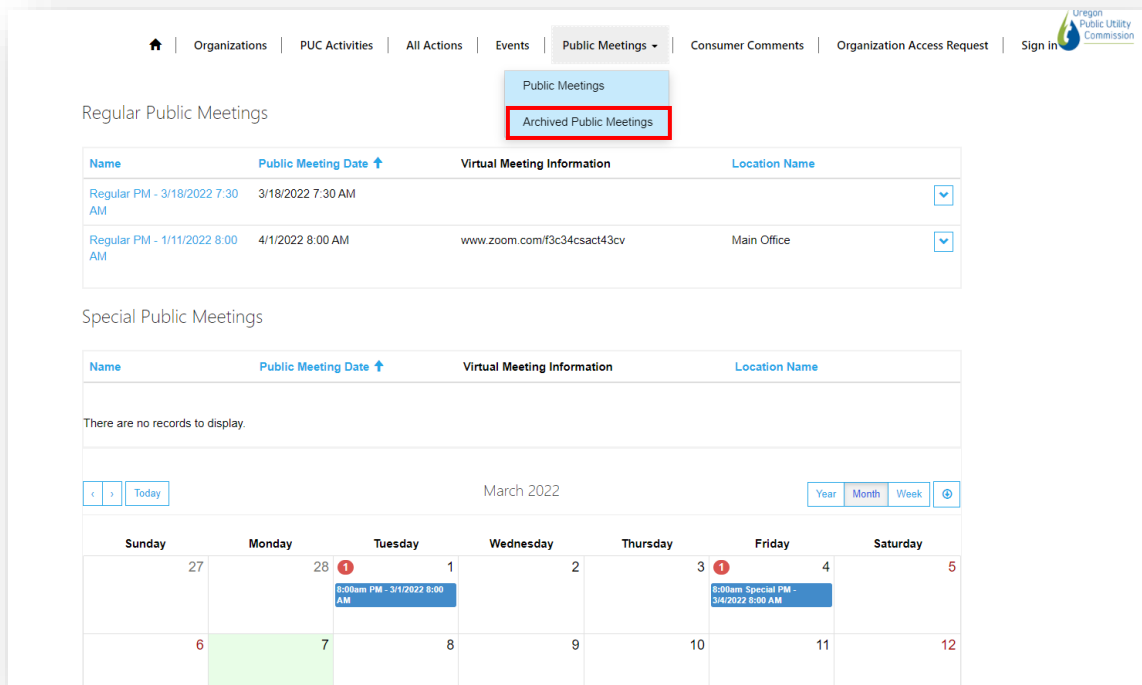
- Use 'Search' on the top right to search for key words within the PUC Activity Number, Action Group, Action Type, Submission Date, Tags.
- Use the column names - PUC Activity Number, Action Group, Action Type, Submission Date - to sort the list.
- Use the filters on the left to filter by Organization (initiating the PUC Activity), PUC Activity, Action Group, and Date Range.
- Actions prior to 2022 will not have tagging information.

Name	Action Group	Action Type	Submission Date	Accepted Date	Description	Tags	Includes Documents
ACT-22-00160	FILINGS/PLEADINGS - F	CP New Application	3/6/2022	3/6/2022	Sylhet Energy's application for 2022 CP		No
ACT-22-00159	FILINGS/PLEADINGS - F	INITIAL (APPLICATION, COMPLAINT, PETITION)	3/6/2022	3/6/2022	UAT DEMO	Southwest, UAT Demo	No
ACT-22-00156	FILINGS/PLEADINGS - F	INITIAL (APPLICATION, COMPLAINT, PETITION)	3/6/2022	3/6/2022	UAT Demo	Southwest, UAT Demo	No

The Events tab contains a list of Event records, as well as a calendar view that displays all upcoming Events. This **Calendar** view can be sorted by **Year**, **Month**, or **Week**.



The Public Meetings tab contains a drop-down menu that allows users to view both upcoming and past public meetings. These pages contain list views and calendar views of the public meetings.



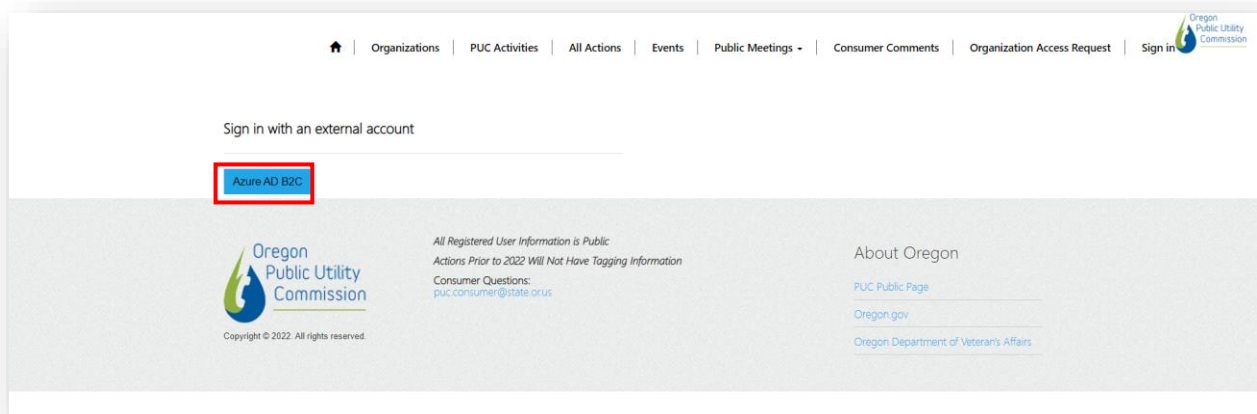
## General

Register as a New User on Portal

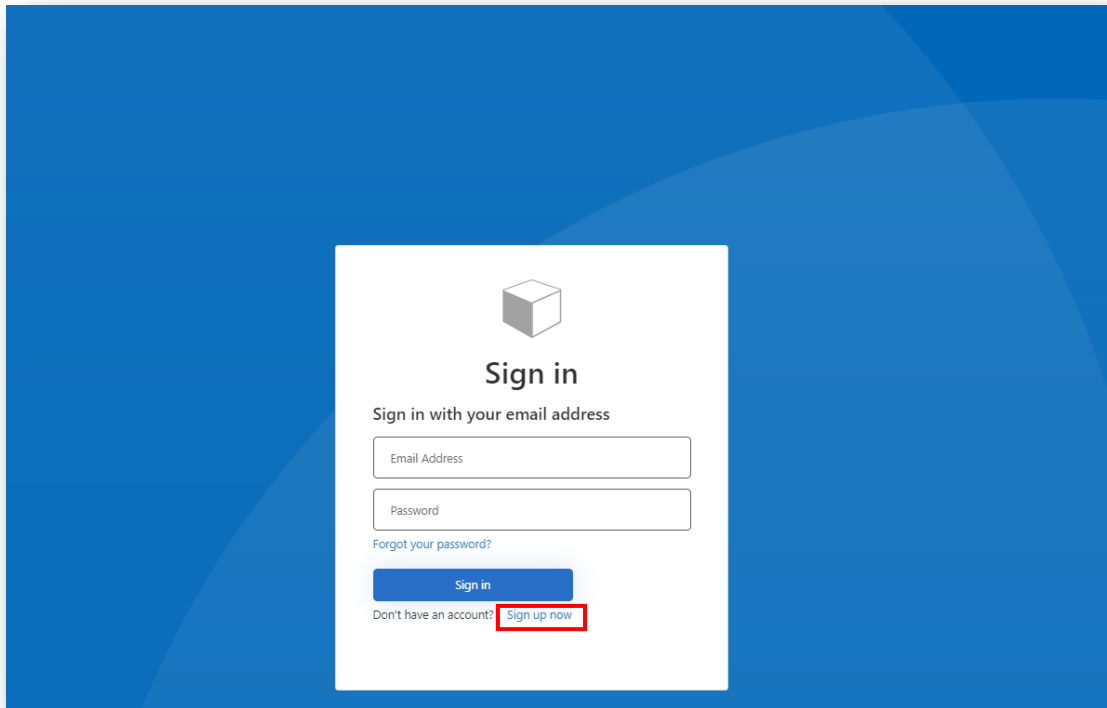
To register on the Oregon Public Utility Commission Activity & Discovery Portal, begin by clicking **Sign In**.




Click **Azure AD B2C**.



Next, click **Sign Up Now**.



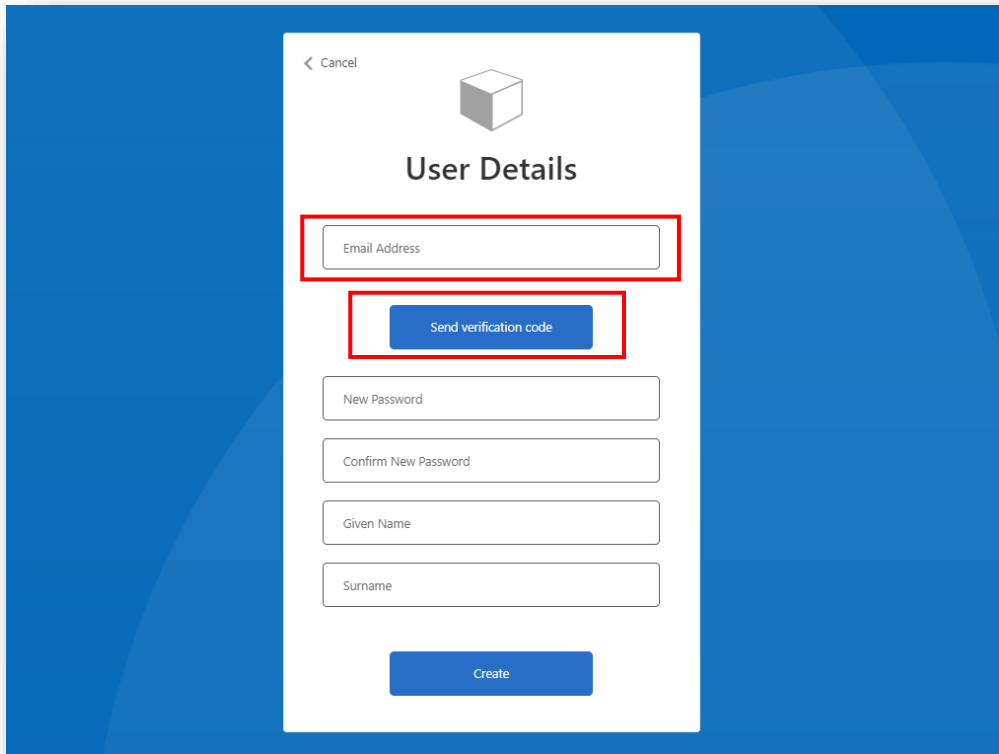


## Sign in

Sign in with your email address


  
  
[Forgot your password?](#)  
  
[Don't have an account?](#)

Enter your **Email Address** and then click **Send verification code**.



The image shows a mobile application interface for creating a user account. The screen has a blue background with a white central form titled "User Details". At the top left of the form is a back arrow and the word "Cancel". Below this is a 3D cube icon. The form contains several input fields and buttons. The "Email Address" field and the "Send verification code" button are highlighted with red rectangular boxes. Below these are fields for "New Password", "Confirm New Password", "Given Name", and "Surname". At the bottom of the form is a blue "Create" button.

< Cancel



### User Details

Email Address

Send verification code

New Password

Confirm New Password

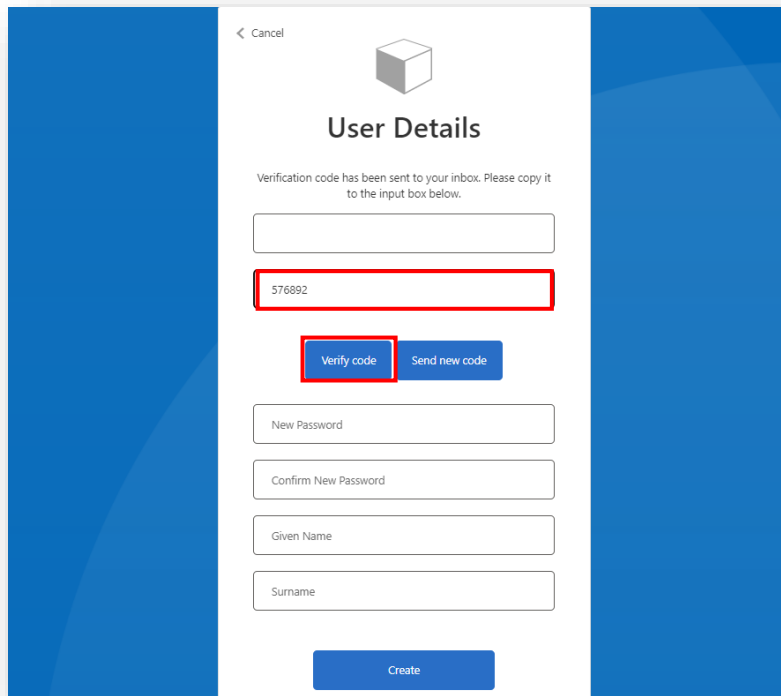
Given Name

Surname

Create

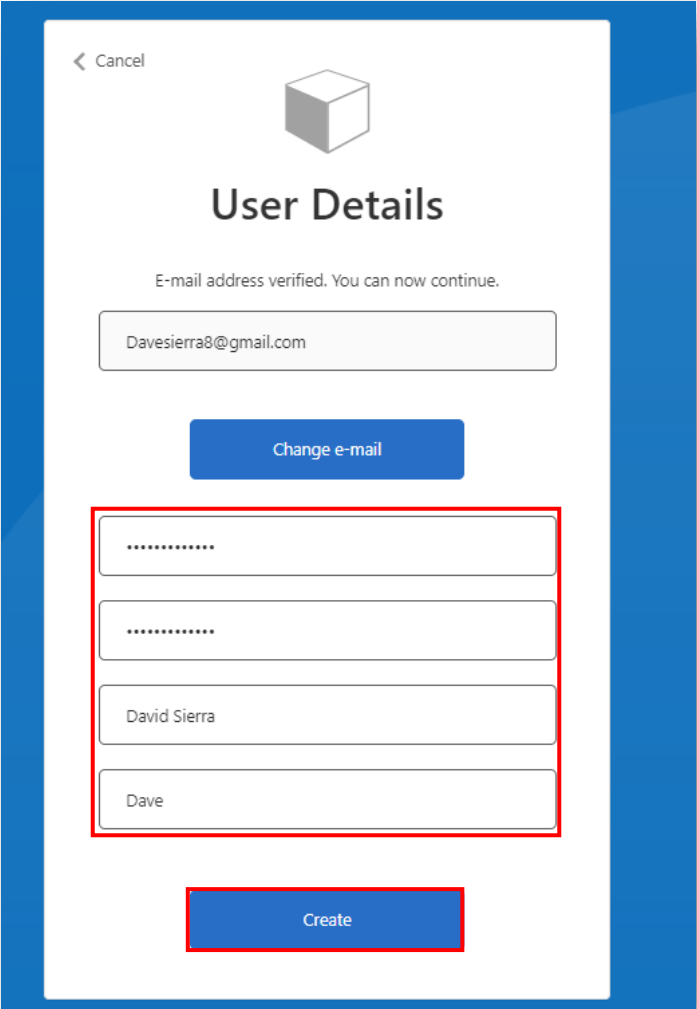


Enter the verification code you received via email, and click **Verify Code**.



The image shows a mobile application screen titled "User Details". At the top left, there is a back arrow and the text "Cancel". Below this is a 3D cube icon. The title "User Details" is centered. A message states: "Verification code has been sent to your inbox. Please copy it to the input box below." There are two input fields; the first is empty, and the second contains the number "576892" and is highlighted with a red border. Below the input fields are two buttons: "Verify code" (highlighted with a red border) and "Send new code". Further down are four more input fields labeled "New Password", "Confirm New Password", "Given Name", and "Surname". At the bottom center is a blue "Create" button.

Once completed, enter in **New Password**, **Confirm Password**, **Given Name** and **Surname**. Click **Create**.



The image shows a mobile application screen titled "User Details". At the top left is a back arrow and the word "Cancel". Below that is a 3D cube icon. The title "User Details" is centered. A message states "E-mail address verified. You can now continue." Below this is a text input field containing "Davesierra8@gmail.com". A blue button labeled "Change e-mail" is positioned below the email field. A red rectangular box highlights a group of four input fields: two password fields (each containing ten asterisks), a "Given Name" field containing "David Sierra", and a "Surname" field containing "Dave". Below the highlighted fields is a blue button labeled "Create", which is also highlighted with a red rectangular box.

Once the initial registration is complete, you will be brought back to the portal. Fill in the **Your Information** section on your profile.

The screenshot shows a web portal for the Oregon Public Utility Commission. The top navigation bar includes links for Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, and All Actions. The main heading is 'Profile'. On the left, there is a sidebar with a profile picture placeholder and a 'Security' section containing links for Change Password, Change Two-Factor authentication, and Manage External Authentication. The main content area is titled 'Your Information' and contains several form fields:

- First Name \***: John
- Last Name \***: Mickie
- Also Known As**: Johnathan
- E-mail \***: John.Mickie@akemail.com
- Business Phone \***: 879 - 412 - 7895
- Web Site**: https://www.xyz.domainname
- Fax**: N/A
- Contact Notes**: (Empty text area)
- Primary Organization**: (Empty text area)
- Address : Name**: Home Address
- Address : Street**: 15 Salem Pkwy
- Address : Street 2**: N/A
- City**: Keizer
- State/Province**: Oregon
- ZIP/Postal Code**: 97303

Scroll down, and fill in the bubbles to **Either Opt-in or Opt-out** of emails. Once completed, Click **Update**.

The screenshot shows a user profile page for the Oregon Public Utility Commission. The navigation bar includes: Home, Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Organization Access Request, All Actions, and the OPU Commission logo. The profile form contains the following fields:

- Address : Name**: Business Address
- Address : Street**: 15 Salem Pkwy
- Address : Street 2**: N/A
- City**: Keizer
- State/Province**: Oregon
- ZIP/Postal Code**: 97303

Below the address fields, the text reads: "You can opt in or out of receiving emails regarding the following email categories:"

The email preference options are:

- Opt-Out of All Emails**:  No  Yes
- Informational**:  Opt Out  Opt In
- Reminder**:  Opt Out  Opt In
- Approval**:  Opt Out  Opt In
- Review**:  Opt Out  Opt In
- Action Required**:  Opt Out  Opt In
- Assigned**:  Opt Out  Opt In

A blue "Update" button is located at the bottom left of the form, highlighted with a red box.

After creating an account, the user can easily log in the portal in the future by clicking on **Azure B2C**.

The screenshot shows the login page for the Oregon Public Utility Commission. The navigation bar includes: Home, Organizations, PUC Activities, All Actions, Events, Public Meetings, Consumer Comments, Organization Access Request, and Sign in (with the OPU Commission logo). The main heading is "Sign in with an external account". Below this heading, there is a blue button labeled "Azure AD B2C", which is highlighted with a red box. The footer contains the OPU Commission logo, copyright information, and links for "About Oregon", "PUC Public Page", "Oregon.gov", and "Oregon Department of Veteran's Affairs".

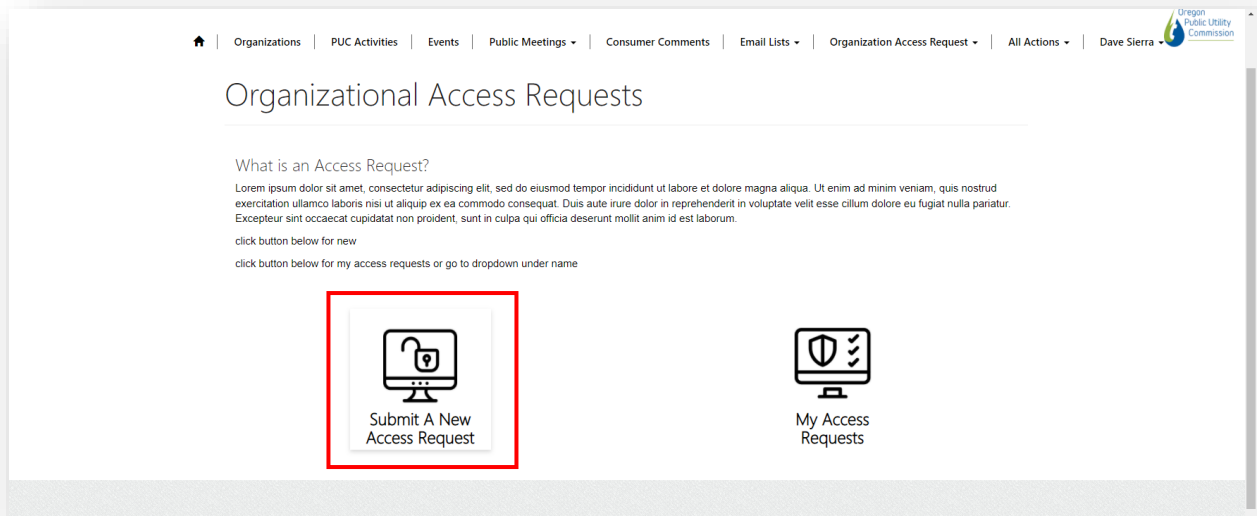
## Submit an Access Request

Once you have registered on the ADS Portal, if you would like to participate in PUC Activities and Discovery, you must first submit an access request to establish a role with your organization. You can request access as a Subscriber/View Only, a Filer, a Data Requestor, or Organization Administrator.

To submit an Access Request, navigate to the **Organization Access Request** drop down menu. Click **Organization Access Request**.



This brings you to the Access Requests landing page. Next, click the **Submit A New Access Request** image.



An Organization Access Request form will open. Input **Represented Organization**, **New Organization (if applicable)**, **Requested Access Role**, and **Description**. Once finished, **Submit** the record.

The screenshot shows the 'Organization Access Request' form. At the top, there is a navigation bar with links for Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, and All Actions. The user 'Dave Sierra' is logged in. The form title is 'Organization Access Request'. Below the title, there is a brief instruction: 'Use this form to establish Role in the system for the Represented Organization: Subscriber/View Only, Filer, Data Requestor, Administrator. If your organization is not listed in the lookup field for Represented Organization, please manually enter it in the New Organization field. Access Requests may require Organization or PUC Approval. Please plan for approval process time.'

The form contains the following fields:

- Represented Organization:** A text input field containing 'Aeon Energy' with a search icon and a clear button.
- New Organization:** A text input field containing 'N/A'.
- Is this your primary organization?:** Radio buttons for 'No' (selected) and 'Yes'.
- Requested Access Role:** A dropdown menu with 'Administrator' selected.
- Description:** A text area containing 'Need Access to Administrator Role for organization updates'.
- Submit:** A blue button at the bottom left, highlighted with a red box.

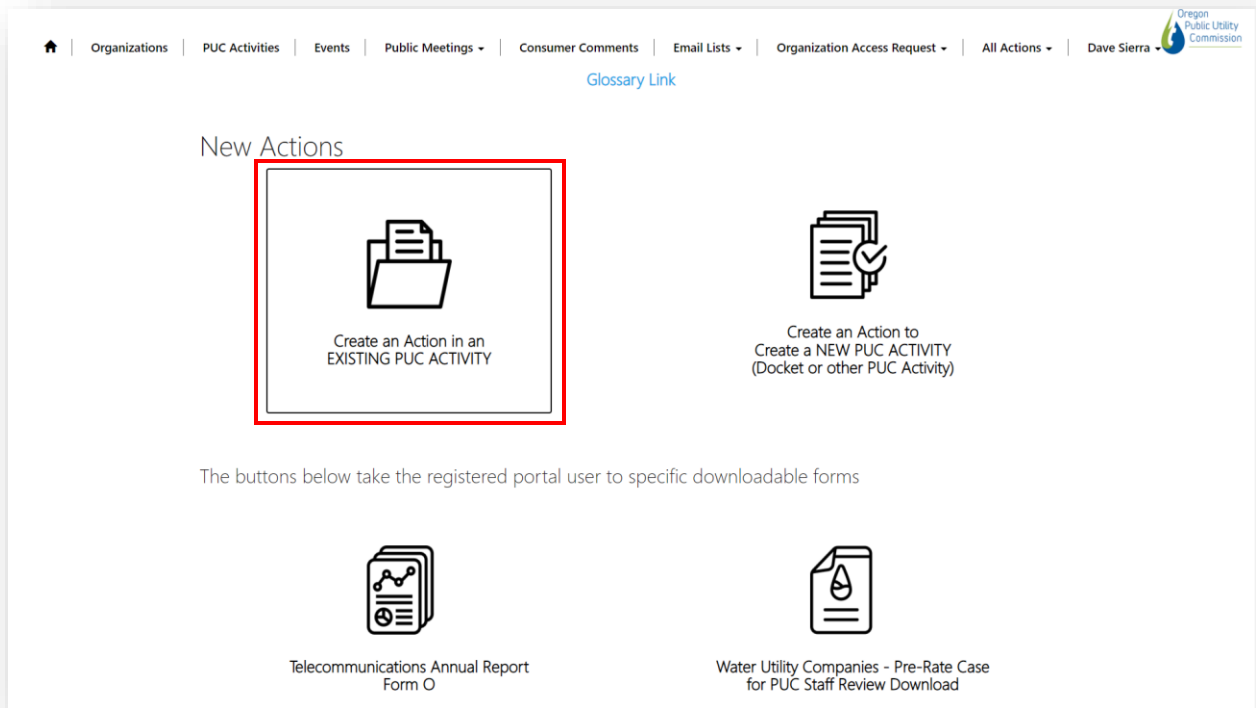
## Filer

Submit an Action Related to PUC activity

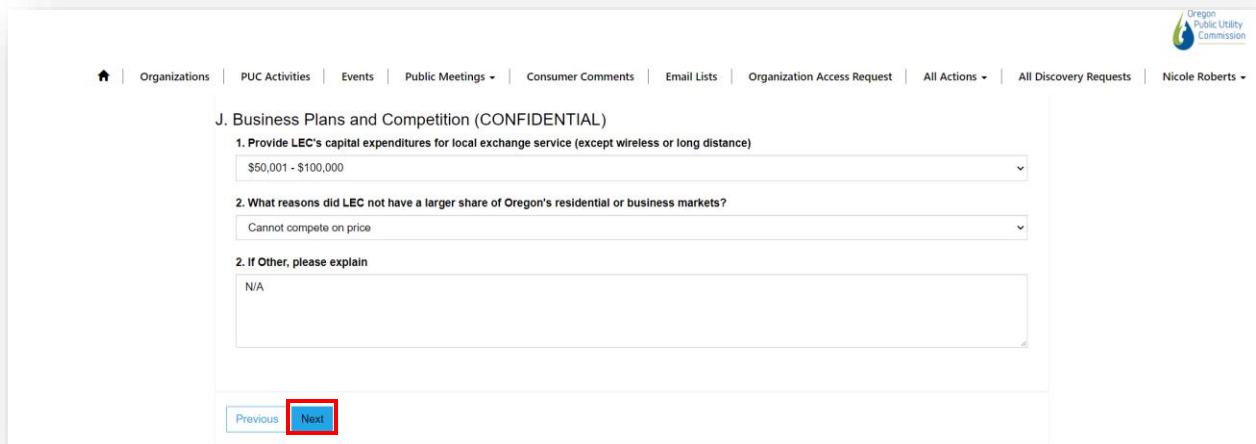
Navigate to the **All Actions** drop down menu and click **Submit an Action**.



Scroll down and select **Create an Action in an PUC Activity**.



Next fill out Form, and scroll down to bottom of page and click **Next**.





Add the **PUC Activity**, **Action Group**, and **Action Type**. Click **Next**.

The screenshot shows the Oregon Public Utility Commission website interface. At the top right is the logo for the Oregon Public Utility Commission. Below the logo is a navigation menu with the following items: Home, Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, All Actions, All Discovery Requests, and Nicole Roberts. The main heading of the page is "New PUC Activity Action - Manual". Below the heading are three input fields, each with a red box around it. The first field is labeled "PUC Activity" and contains the text "ADV-01043". The second field is labeled "Action Group" and contains the text "NOTICES - F". The third field is labeled "Action Type" and contains the text "COMMENTS/RESPONSE". Below these fields is a blue button labeled "Next", which is also highlighted with a red box.

Next, attach any **Related Documents** (if applicable) by clicking the **Carrot** and selecting **Upload Files**. Once Completed, click **Submit**.

Organizations | PUC Activities | Events | Public Meetings | Consumer Comments | Email Lists | Organization Access Request | All Actions | All Discovery Requests | Nicole Roberts

## New PUC Activity Action - Manual

PUC Activity *	Action Group *	Action Type *
ADV-01014	FILINGS/PLEADINGS - F	COMMENTS/RESPONSE

**Confidentiality** ↑

Confidential

Highly Confidential  **Upload Files**

Non-Confidential

Did you upload a redacted version of any Confidential or Highly Confidential documents?  
 No  Yes

Previous **Submit**

Once Submitted, a **Submission Completed Successfully** message will display.

Organizations | PUC Activities | Events | Public Meetings | Consumer Comments | Email Lists | Organization Access Request | All Actions | All Discovery Requests | Nicole Roberts

## New PUC Activity Action - Manual

Submission completed successfully.

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Copyright © 2022. All rights reserved.

All Registered User Information is Public  
Actions Prior to 2022 Will Not Have Tagging Information  
Consumer Questions:  
[puc.consumerinfo.state.or.us](http://puc.consumerinfo.state.or.us)

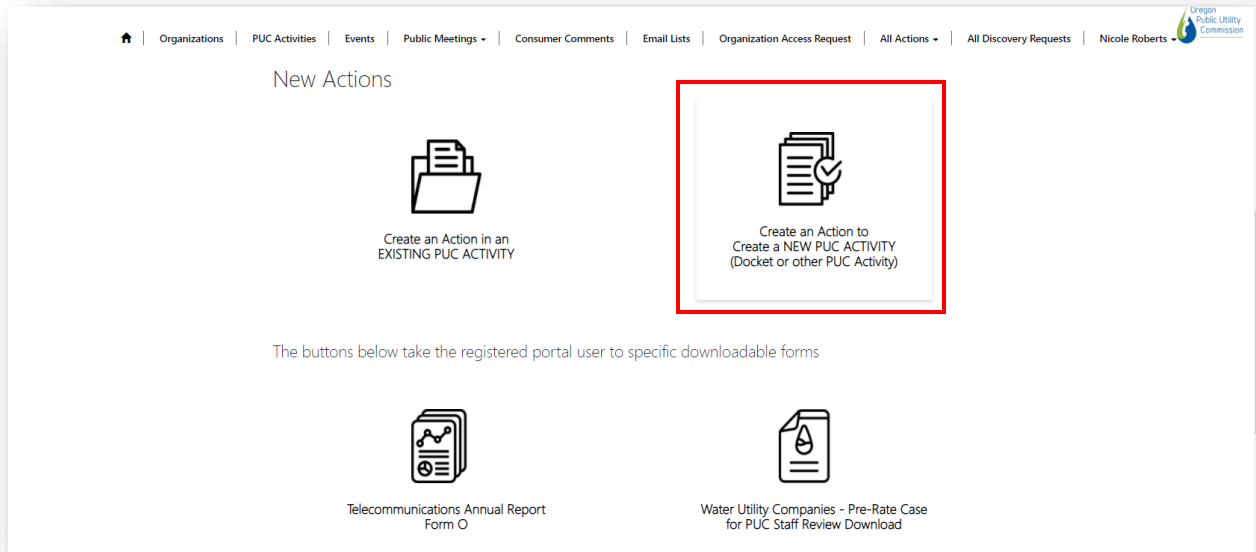
About Oregon  
[PUC Public Page](#)  
[Oregon.gov](http://Oregon.gov)  
[Oregon Department of Veterans Affairs](#)

Submit an Initial Action (File for a New Docket)

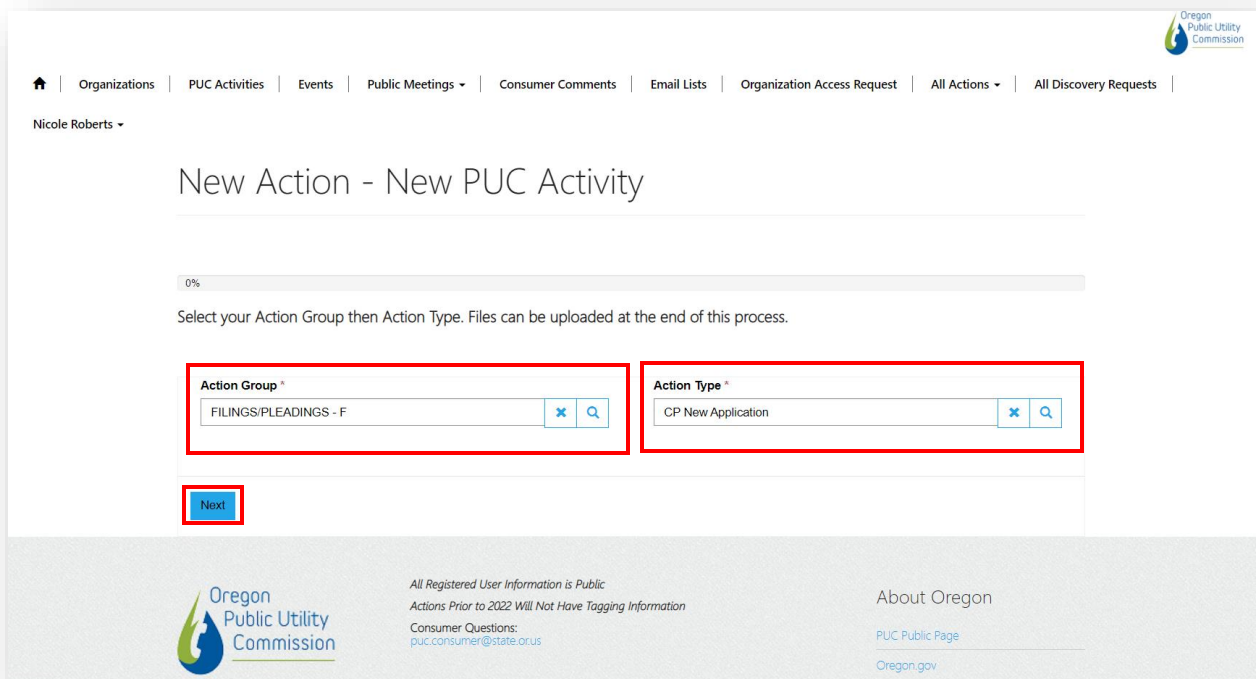
Navigate to the **All Actions** drop down menu and click **Submit an Action**.



Scroll down and select **Create an Action to Create a New PUC Activity**.



Next, enter information into both the **Action Group** and **Action Type**. Click **Next**.



Enter in the **Organization** you are representing and any other fields (if applicable). Click **Next**

Organizations | PUC Activities | Events | Public Meetings - | Consumer Comments | Email Lists | Organization Access Request | All Actions - | All Discovery Requests | Nicole Roberts - Oregon Public Utility Commission

## New Action - New PUC Activity

20%

Fill in a Description of your Action, i.e. "PGE's application for 2023 Rate Case."

Action Group	Action Type
FILINGS/PLEADINGS - F	CP New Application

Either select your Organization from the pop-up list in the "Organization" field or, if your Organization is not listed, input your new Organization name in the "New Organization Name" field. Do not update both fields.

**Organization** Southwest Power Corp

**New Organization Name**

**Description**  
CP App for Southwest Power Corp.

**Tags - separate each tag with a comma and a space. Ex. water, John Smith, 2022**  
CP APP, Southwest Power Corp.

**Duplicate this Action to another PUC Activity?**  
No

Fill out the rest of the form. The content of the form changes depending on which type of Action you are filing. When you complete the form, click **Next**.

No  Yes  
 c. Describe the User Group or Association at the STS location  
 N/A

**Conditions of a Certificate of Authority**  
 As a condition of a certificate of authority, applicant must comply with all applicable Commission rules and state law, as well as conditions listed in the certificate. For your convenience, following is a summary of some conditions from OAR 860 Divisions 32 and 33. Additional conditions may be specified in the certificate.

**Certificate holder must:**

- Provide only the telecommunications service authorized in the certificate.
- Respond in a timely manner to Commission inquiries.
- Notify the Commission of changes to the certificate holder's name, address, email, or telephone number.
- Maintain its books and records according to the applicable rules of the Commission, and keep its books and records open to inspection by the Commission to the extent necessary to verify information required of the certificate holder.
- Meet service standards set forth in applicable Commission rules, including OAR 860-032-0012.
- Submit required reports in a timely manner, and timely pay all Commission taxes, fees, assessments, access charges, and subsidies pursuant to Oregon law or Commission rules, orders, tariffs, or price lists.
- Pay an annual fee to the Commission pursuant to the Commission's rules. This fee will be based on the certificate holder's annual gross retail intrastate revenues and will be no less than \$100 per calendar year. Certificate holder must collect the fee by charging an equitable amount to each retail customer and describe the amount of the apportioned charge on each retail customer's bill, pursuant to the Commission's rules.
- Pay a quarterly amount to the Oregon Universal Service Fund based on a Commission-approved surcharge percentage assessed on all retail telecommunications services sold in Oregon pursuant to ORS 759.425(4).
- Ensure that the Residential Service Protection Fund surcharge is remitted monthly to the Commission. This surcharge is assessed against each paying retail subscriber at a rate that is set annually by the Commission.

**Applicant understands that all services provided must comply with all applicable rules and state law**  
 No  Yes

**Authorized Representative Signature:** David Sierra  
**Authorized Representative Title:** VP  
**Authorized Representative Signature Date:** 2/28/2022

[Previous](#) [Next](#)

To add contacts to the service list that will belong to this new PUC Activity when it is created, select **+ Add New Contact** to add a Contact to the ListServ.

New Action - New PUC Activity  
 60%

If you would like to add contacts to the ListServ, do so here.

Action Group	Action Type	Primary Organization (Contact)	Email (Contact)	Organization
FILINGS/PLEADINGS - F	CP New Application			

[+ Add New Contact](#)

There are no records to display.

[Previous](#) [Next](#)

Once selected, a form will display. Fill in **Contact**, **Represented Organization**, and **Description** (if applicable). Click **Submit**.

The screenshot shows a web application interface for the Oregon Public Utility Commission. A modal window titled "Create" is open, displaying a form with the following fields:

- Contact**: A dropdown menu with "Dave Sierra" selected. A red box highlights this field.
- Represented Organization**: A dropdown menu with "Aeon Energy" selected. A red box highlights this field.
- Description**: A text area containing "N/A".
- Submit**: A blue button at the bottom of the form. A red box highlights this button.

The background of the application shows a navigation menu with "Organizations" and "PU" selected, and a user profile for "Nicole Roberts". The footer contains the Oregon Public Utility Commission logo and contact information.

Next, attach any **Related Documents** (if applicable). Documents are separated by confidentiality level. When you've uploaded all necessary documents, click **Submit**.

80%

Upload your documents to the appropriate folder. If you are uploading a confidential or highly confidential document, you must also upload the redacted version of the document to the Non-Confidential folder.

### Related Documents

Action Group	Action Type
FILINGS/PLEADINGS - F	CP New Application

Confidentiality ↑

- Confidential
- Highly Confidential
- Non-Confidential

Did you upload a redacted version of any Confidential or Highly Confidential documents?

No  Yes

Previous Submit

Once Submitted, a **Submission Completed Successfully** message will display.

## New PUC Activity Action - Manual

Submission completed successfully.

**Oregon Public Utility Commission**  
Copyright © 2022. All rights reserved.

All Registered User Information is Public  
Actions Prior to 2022 Will Not Have Tagging Information  
Consumer Questions:  
puc.consumer@state.or.us

About Oregon  
[PUC Public Page](#)  
[Oregon.gov](#)  
[Oregon Department of Veterans Affairs](#)

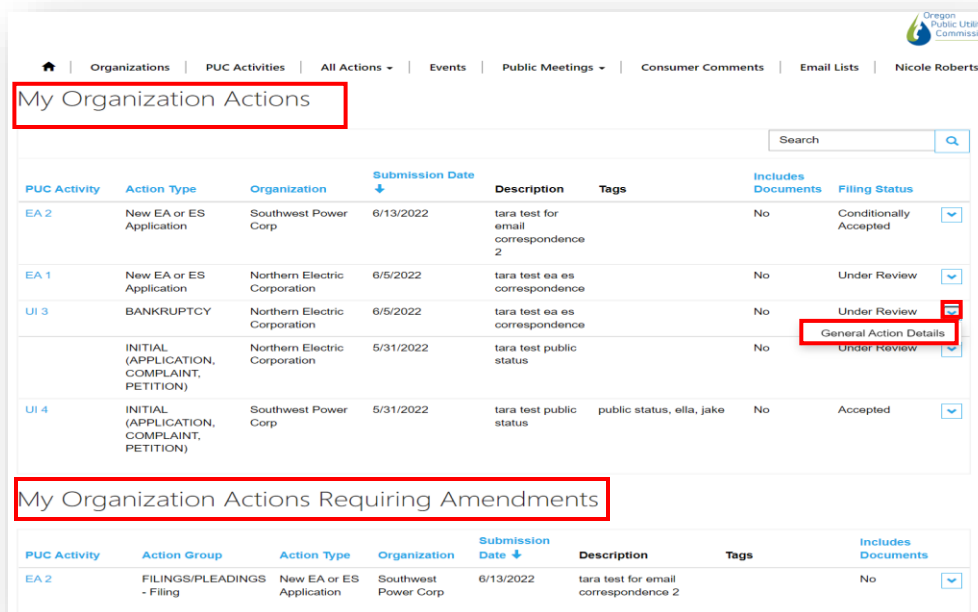


## Submit an Amendment to an Action

If PUC has requested that you amend an action you have previously filed, navigate to the **User** drop down menu and click **My Organizations Actions**.

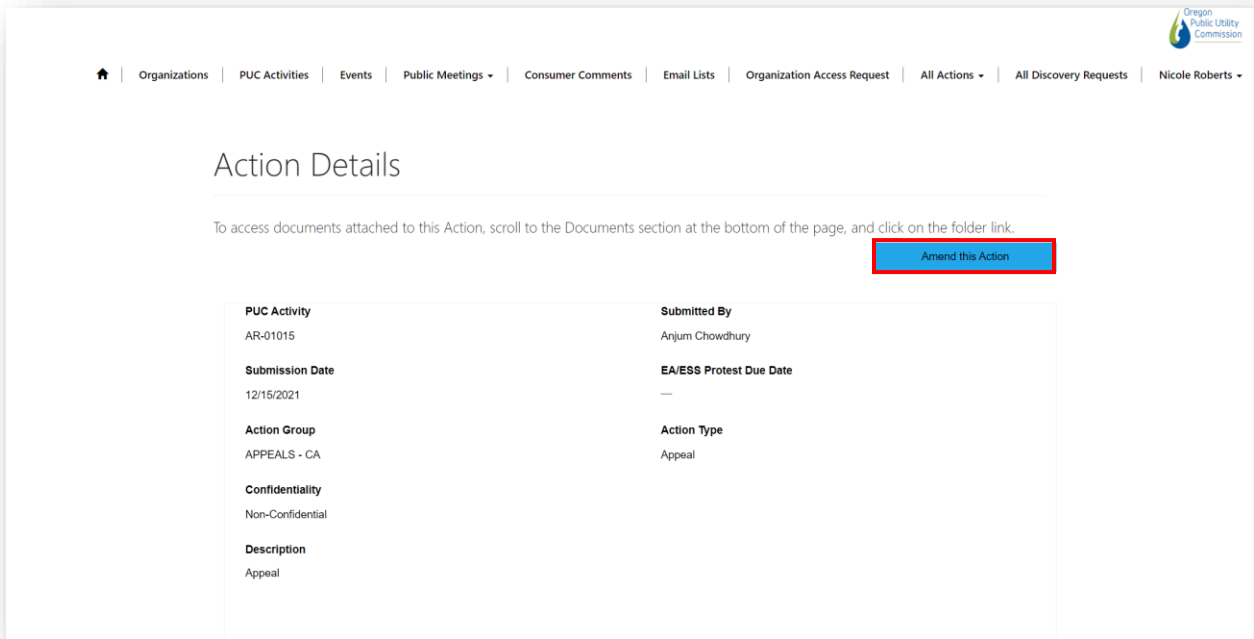


Organizations can amend their actions by navigating to the **My Organization Actions** page and opening an action from either the "**My Organization Actions**" list or the "**My Organization Actions Requiring Amendments**" list. Click the **Carrot** and Select the Record.

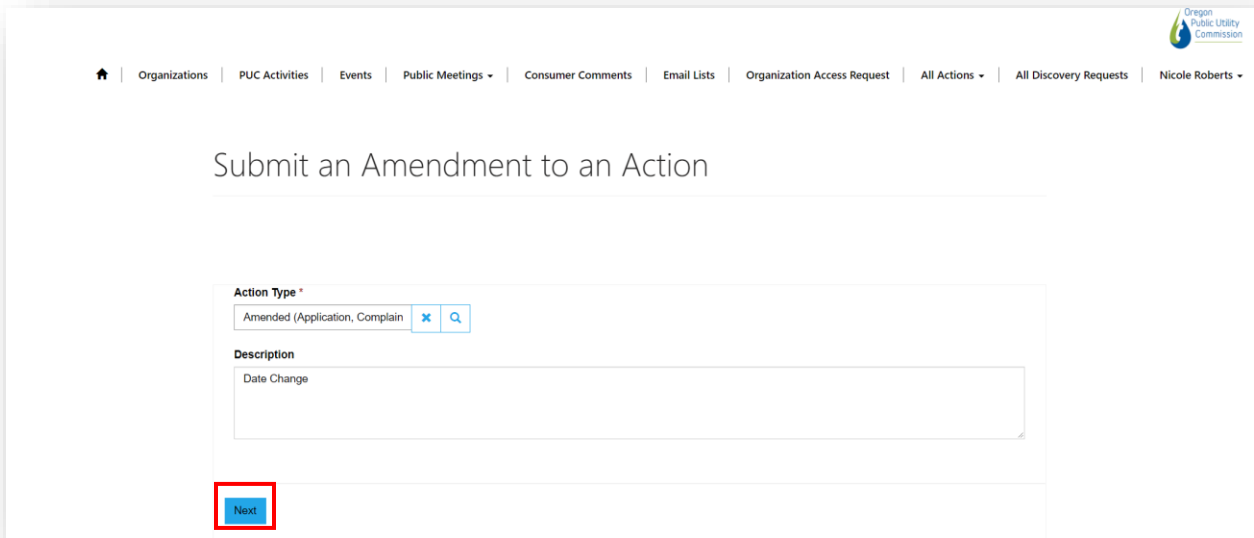


Opening the action record from either list will bring the user to the **Action Details** page, where there is a button labeled "**Amend this Action.**"

Review the Record and click **Amend This Action.**



Review, make any changes, and click **Next.**



Add **Tags** (if applicable) and click **Next**.

Submit an Amendment to an Action

Tab

Related Action	Action Group	Action Type
ACT-21-00090	FILINGS/PLEADINGS - F	Amended (Application, Complaint, Petition)

Tags - Separate each tag by a comma and a space. For Example - John Doe, water, 2022

Amendment, Filing

Previous Next

Add any **Documents** (if applicable) and click **Submit**.

Related Documents

Related Action	Action Group	Action Type
ACT-21-00090	FILINGS/PLEADINGS - F	Amended (Application, Complaint, Petition)

Confidentiality ↑

Confidential

Highly Confidential

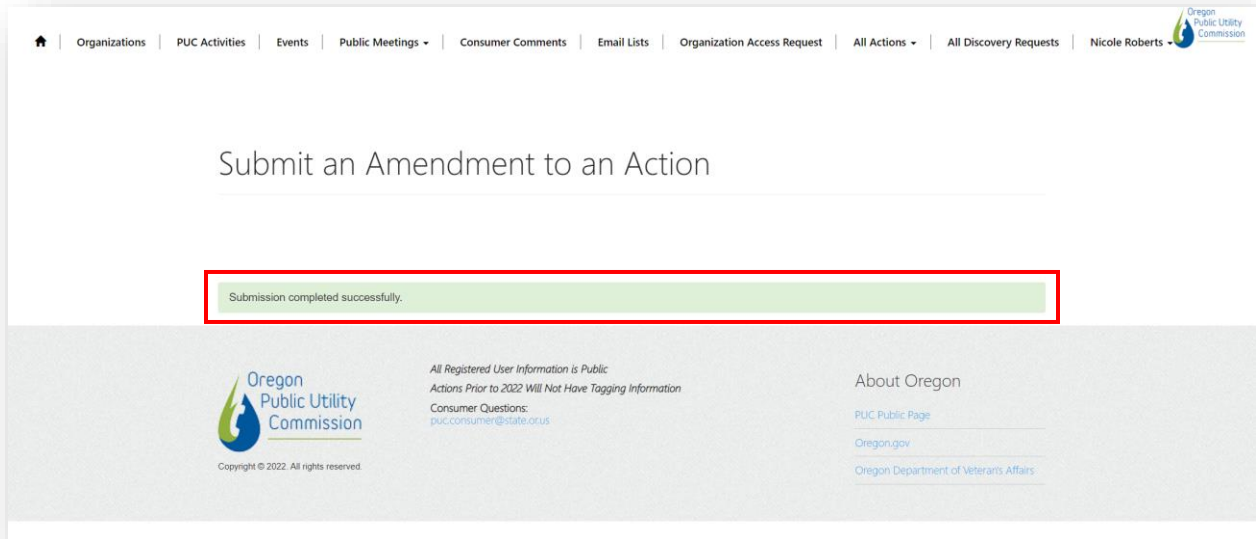
Non-Confidential

Did you file a redacted version of the

No  Yes

Previous Submit

Once Submitted, a **Submission Completed Successfully** message will display.

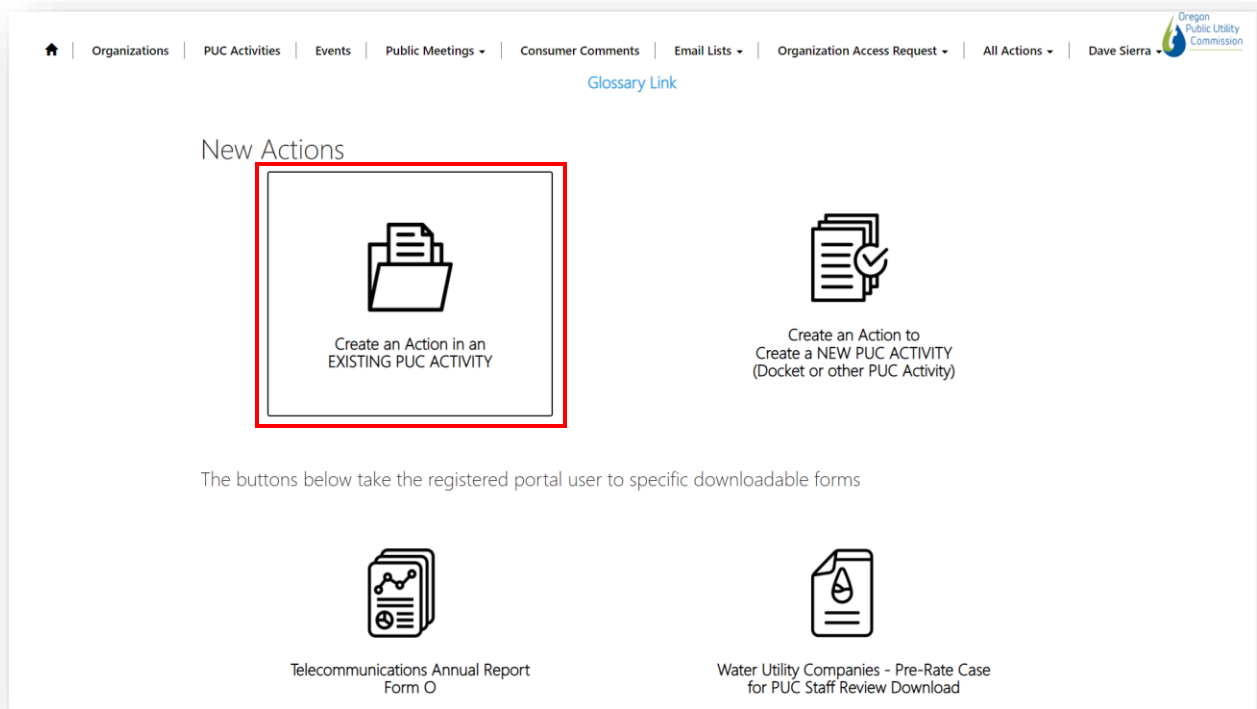


## Submit a Participant Comment

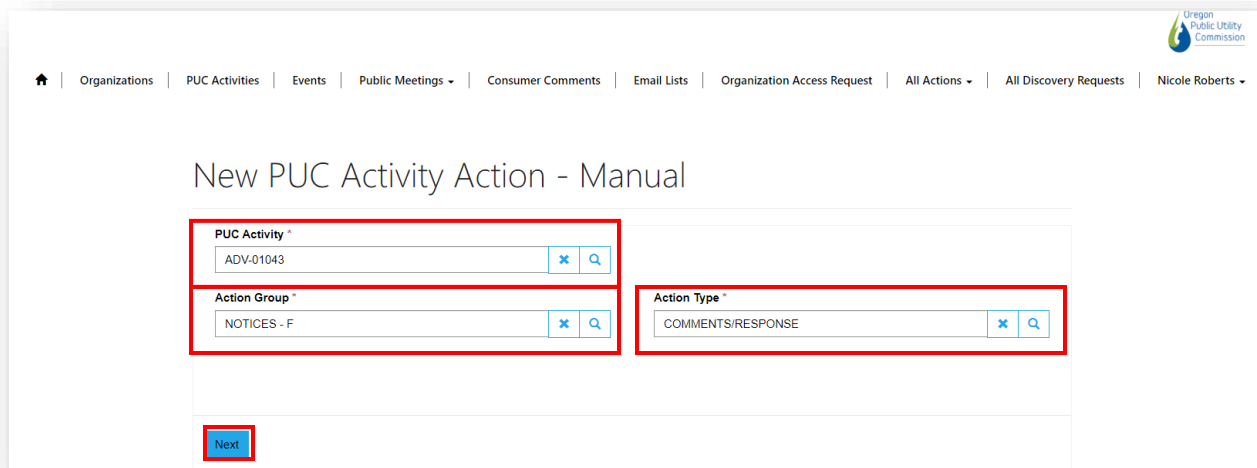
To submit a comment as a participant in a PUC Activity, navigate to the **All Actions** drop down menu and click **Submit an Action**.



Scroll down and select **Create an Action in an Existing PUC Activity**.



Next fill out **PUC Activity**, **Action Group**, and set **Action type** with the following values (Action Type = **Comments/Response**). Click **Next**.



Next, add the **Organization, Description, and Tags**. Then click **Next**.

Organization: Southwest Power Corp

Description: I have more additional information required for the PUC Activity.

Tags - separate each tag with a comma and a space. Ex. water, John Smith, 2022  
Southwest, Comment

Would you like to duplicate this Action to another PUC Activity?  
 Yes  
 No

Previous **Next**

Next, attach any **Related Documents** (if applicable) by clicking the **Carrort** and selecting **Upload Files**. Documents are separated by confidentiality level. Once Completed, click **Submit**.

Confidentiality ↑

Confidential **Upload Files**

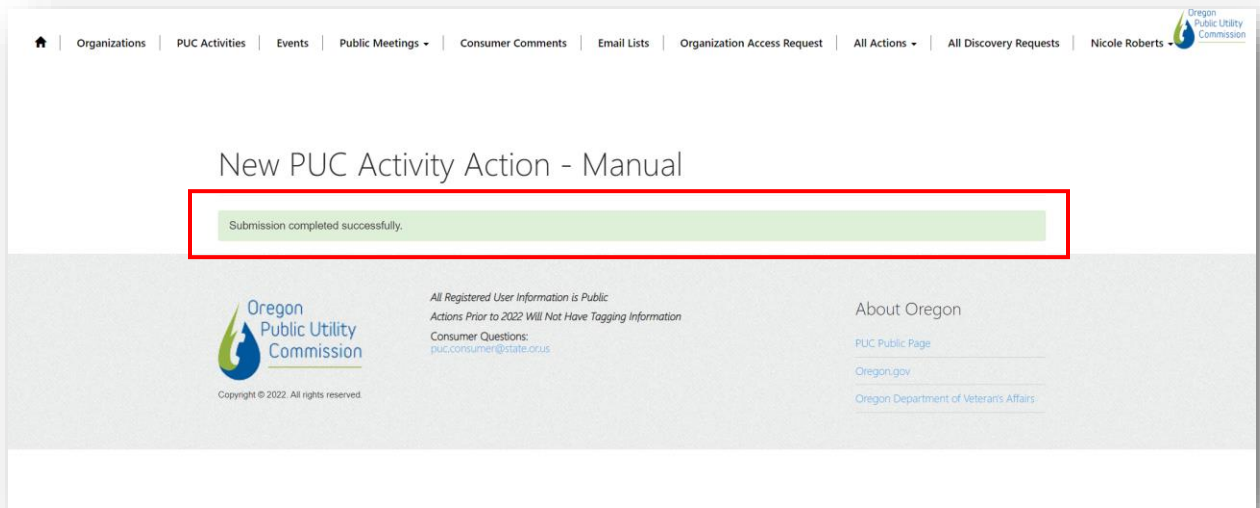
Highly Confidential

Non-Confidential

Did you upload a redacted version of any Confidential or Highly Confidential documents?  
 No  Yes

Previous **Submit**

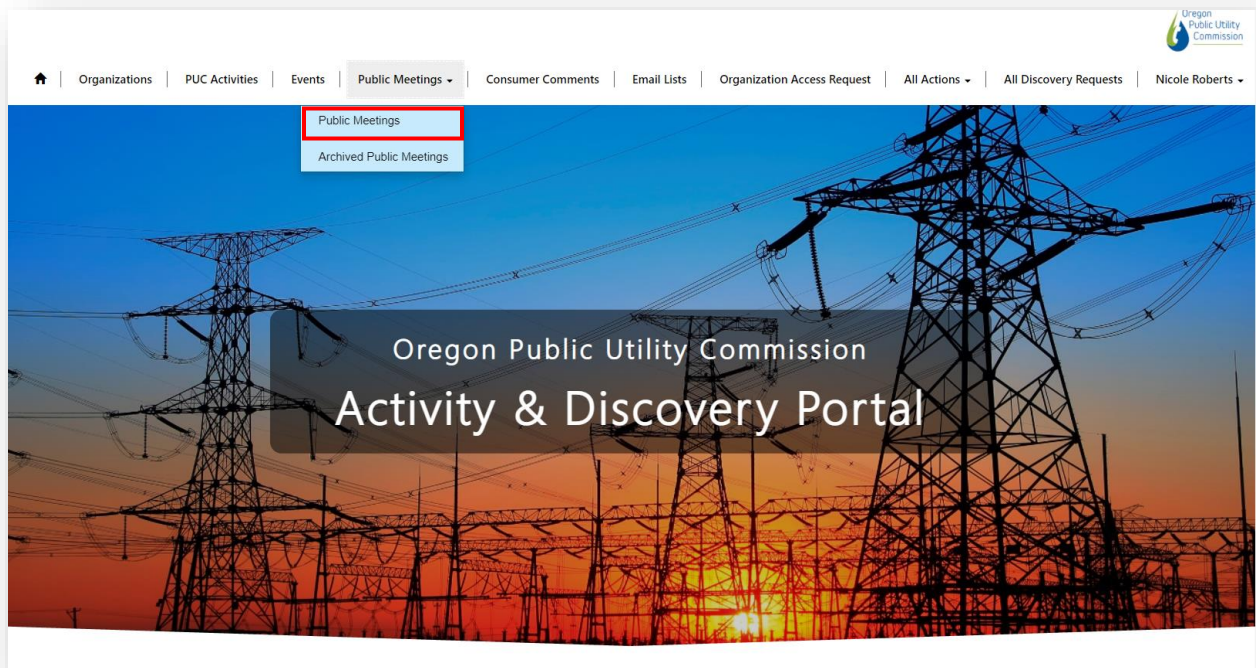
Once Submitted, a **Submission Completed Successfully** message will display.





## Submit a Public Meeting Action

To submit an action related to a Public Meeting, navigate to the **Public Meeting** tab and select **Public Meetings**.



Scroll down to the public meetings, click the **Carrot**, and select **View Details**.

Public Meetings - Upcoming

View below for a listing of all Commission Regular and Special Public Meetings, as well as select workshops hosted by PUC Staff.

- Commission Public Meetings include both Regular Public Meetings (held every other Tuesday morning), as well as Special Public Meetings scheduled and led by the Commission to address identified matters.
- In some cases, workshops scheduled and led by PUC Staff, hearings scheduled and led by the PUC's Administrative Hearings Division (AHD), or other events will be noticed as "Special Public Meetings" if more than one Commissioner plans to attend. This is to ensure compliance with the open public meetings law. Please note, Staff workshops, AHD hearings, and other events may be attended by a single Commissioner without being noticed as a "Special Public Meeting."
- PUC Staff workshops not attended by Commissioners may be listed here for convenience and transparency. However, not all Staff workshops and meetings are listed here, so be sure to view the schedule for a specific docket within [eDockets](#) or visit the appropriate section of the website for a separate listing of events.

Public comment is allowed in many, but not all, Commission Public Meetings and Staff workshops. View meeting agendas to determine if public comment will be accepted.

To view a more complete listing of PUC public meetings, workshops, conferences or public comment hearings, [search upcoming PUC events by week](#).

**NOTICE:** Due to COVID-19, public meetings listed below will be accessible by conference call or webinar. View the agenda for participation details. For public meetings utilizing the Zoom platform, please view these [Zoom instructions](#) to help ensure your participation

Regular Public Meetings

Name	Public Meeting Date ↑	Virtual Meeting Information	Location Name
Regular PM - 3/18/2022 7:30 AM	3/18/2022 7:30 AM		

Special Public Meetings

Name	Public Meeting Date ↑	Virtual Meeting Information	Location Name
Special PM - 3/4/2022 8:00 AM	3/4/2022 8:00 AM		

Next, scroll down and click the **Submit A Public Meeting Action** image.

Regular Public Meeting Details

The Oregon Public Utility Commission (PUC) is hosting this meeting remotely. The meeting is open to the public and accessible to persons with disabilities. To request accommodation, please email [puc.publicmeetings@puc.oregon.gov](mailto:puc.publicmeetings@puc.oregon.gov) or call 503-378-6611 at least 48 hours before the meeting.

The PUC may enter into an executive session during any public meeting to consider information exempt from disclosure by law under ORS 192.660(2)(f), or to consult with counsel under ORS 192.660(2)(h). **All executive sessions are closed to the general public.**

**Reports, Memos, Presentations**

These materials will be linked under the appropriate agenda item below when available.

**Questions?**

Send an email to [puc.publicmeetings@puc.oregon.gov](mailto:puc.publicmeetings@puc.oregon.gov) or call 503-378-6611.

**Public Comment**

The public may provide comment in the following ways:

- **By email** – [puc.publiccomments@puc.oregon.gov](mailto:puc.publiccomments@puc.oregon.gov)
- **By Mail** - Oregon Public Utility Commission, Attn: Public Comment, PO Box 1088, Salem OR 97308-1088
- **By Phone** - 503-378-6600 or 800-522-2404 or TTY 800-648-3458 weekdays from 8 a.m. - 5 p.m.

Public comment is allowed in many, but not all, Commission Public Meetings and Staff workshops. View meeting agenda to determine if public comment will be accepted.

Meetings are arranged by date, with the most recent at the top of the list. Click the name of the Regular or Special Public meeting to see the Agenda and associated Documents (Public Meeting Reports, Presentations, or other documents).

New Consumer Comment

Submit A Public Meeting Action

Select the **Action Group** and **Action Type** for this public meeting action.

Public Meeting Actions

**Action Group**  
FILINGS/PLEADINGS - F

**Action Type**  
Public Meeting Agenda Item Comment

**Description**  
Outstanding Items

**Tags** - Separate each tag by a comma and a space. For Example - John Doe, water, 2022  
Public Meeting Agenda Item, Public Meeting

Next

Add the **Organization** in which this comment will be associated to. Then add the **Public Meeting** and **Public Meeting Agenda Item**

Public Meeting Comment

**Organization**  
Northern Electric Corporation

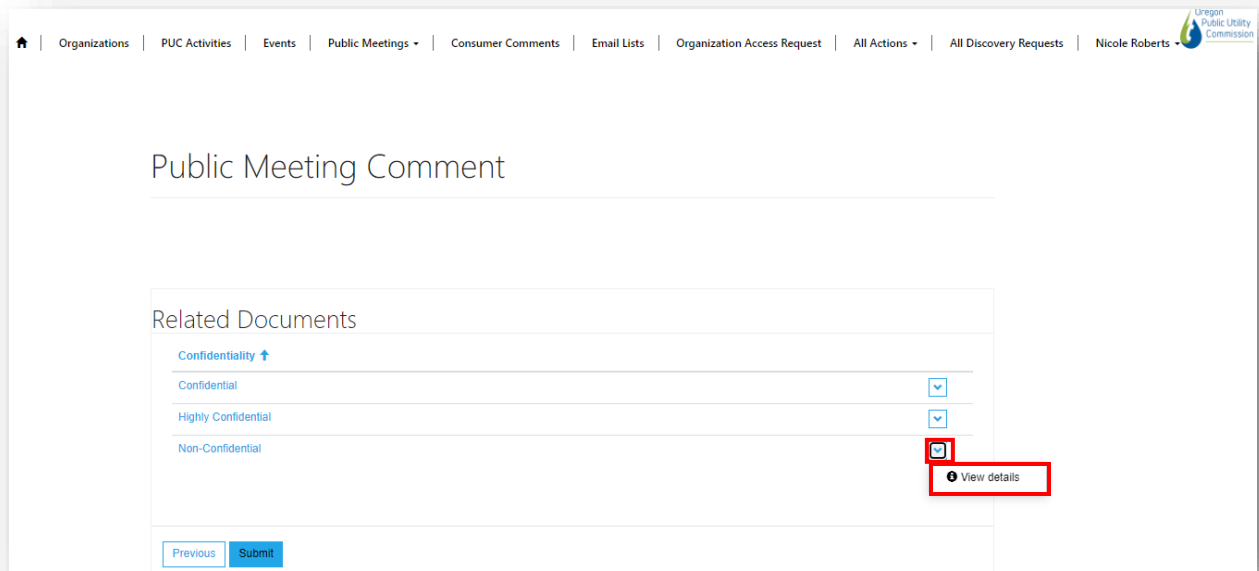
**Public Meeting**  
Regular PM - 3/18/2022 7:30 AM

**Public Meeting Agenda Item**  
p-45

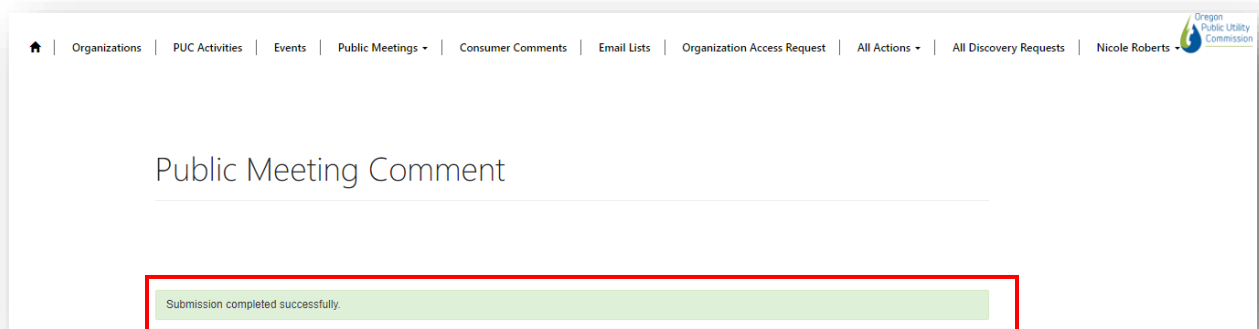
**Comment**  
In order for the meeting to take place we will need the required items. I've sent the item list over via email.

Previous Next

To attach any documents to the **Public Meeting Comment**, click the **Carrot** and select **View Details**.



Once Submitted, a **Submission Completed Successfully** message will display



## Data Requestor

Create a Discovery Request

Navigate to the **User** drop down menu and click **My Organization Discovery Requests**.



Click + New Discovery Request to add a new Discovery Request.

can search for DR number, activity, both date fields, both org fields

### My Organization Discovery Requests - Responding

Name	PUC Activity	Requesting Organization	Responding Organization	Request Date ↓	Due Date ↑	Confidentiality	Response Status	Tagging
DR Set 1: Boulder Bridge LLC - American Energy	UI-01017	Boulder Bridge LLC	American Energy	2/1/2022	2/15/2022	Non-Confidential	New	
DR Set 1: OPUC - Anjums New Org	01021	OPUC	American Energy	1/12/2022	1/26/2022	Non-Confidential	New	

### My Organization Discovery Requests - Requesting

Name	PUC Activity	Requesting Organization	Responding Organization	Request Date ↓	Due Date ↑	Confidentiality	Response Status	Tagging
DR Set 1: American Energy - North East Electric	UI-01017	American Energy	North East Electric	2/1/2022	2/15/2022	Non-Confidential	All Responses Provided	

Add the PUC Activity and Related Action (if applicable). Click Next.

## New Discovery Request

**PUC Activity \***

**Associated Action**

**Oregon Public Utility Commission**  
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All Registered User Information is Public  
Actions Prior to 2022 Will Not Have Tagging Information  
Consumer Questions:  
puc.consumer@state.or.us

About Oregon  
PUC Public Page  
Oregon.gov  
Oregon Department of Veteran's Affairs

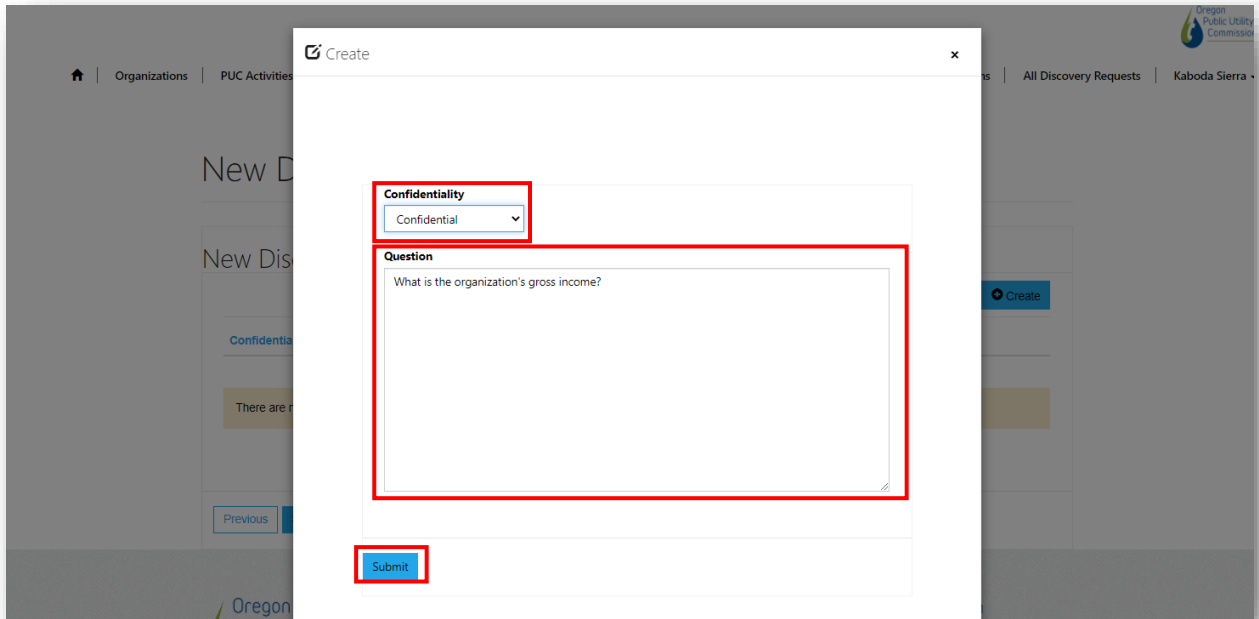
Next, input the **Requesting Organization** and the **Requesting Organization**. Once complete click **Next**.

The screenshot shows the 'New Discovery Request' form. At the top right is the Oregon Public Utility Commission logo and the user name 'Kaboda Sierra'. A navigation bar includes links for Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, All Actions, All Discovery Requests, and Kaboda Sierra. The main heading is 'New Discovery Request'. Below it are two search fields: 'Requesting Organization \*' containing 'American Energy' and 'Responding Organization \*' containing 'OPUC'. Below these are fields for 'Due Date' (3/15/2022), 'Description' (Information Required), and 'Tagging' (American Energy, OPUC). At the bottom left are 'Previous' and 'Next' buttons, with 'Next' highlighted by a red box.

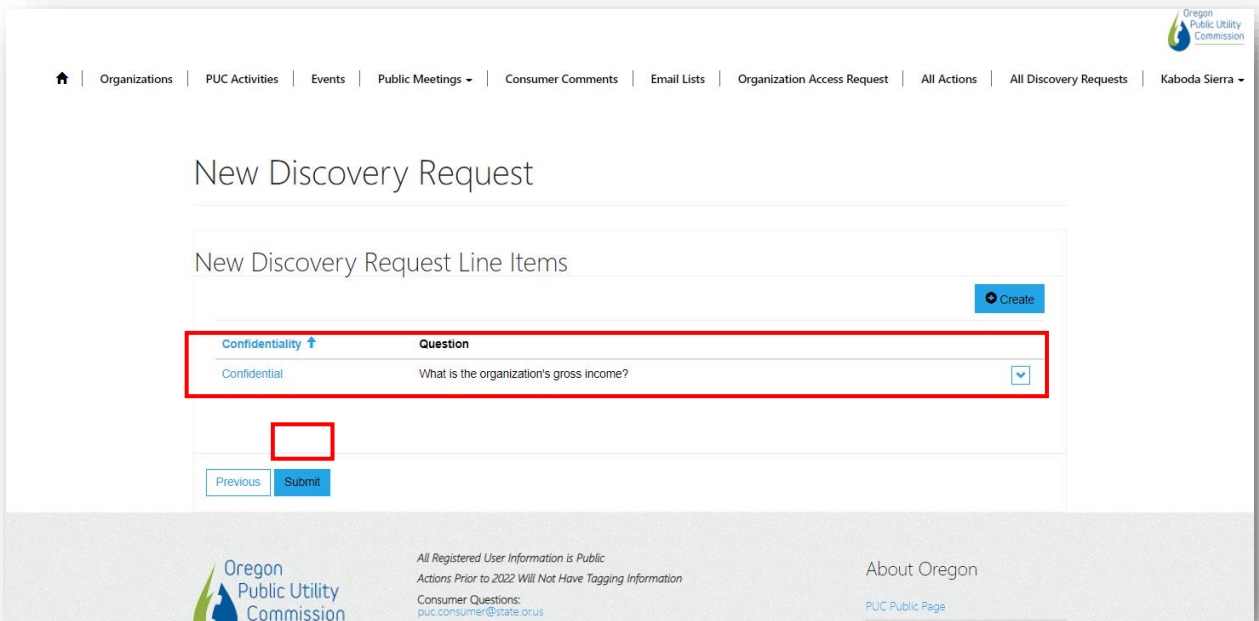
To add a **Discovery Request Line Item**. Click **+ Create**.

The screenshot shows the 'New Discovery Request Line Items' page. At the top right is the Oregon Public Utility Commission logo and the user name 'Kaboda Sierra'. A navigation bar includes links for Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, All Actions, All Discovery Requests, and Kaboda Sierra. The main heading is 'New Discovery Request Line Items'. Below it is a '+ Create' button highlighted with a red box. Below the button are columns for 'Confidentiality' and 'Question'. A yellow message box states 'There are no records to display.' At the bottom left are 'Previous' and 'Submit' buttons. The footer includes the Oregon logo, the text 'All Registered User Information is Public. Actions Prior to 2022 Will Not Have Tagging Information.', and 'About Oregon'.

Set the **Confidentiality** of the Discovery Request and add your **Question**. Click **Submit**.



The **Discovery Request Line Item** will display in the **Grid** if successfully added. Once you have added all the line items, click **Submit**.





## Respond to a Discovery Request

Navigate to the **User** drop down menu and click **My Organization Discovery Requests**.





To Respond to a Discovery Request, click the **Carrot**, then select **View Details**.

The screenshot shows the Oregon Public Utility Commission website interface. At the top, there is a navigation bar with links for Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, All Actions, All Discovery Requests, and Kaboda Sierra. The main heading is "My Organization Discovery Requests". Below the heading is a search bar with the text "can search for DR number, activity, both date fields, both org fields".

There are two main sections: "My Organization Discovery Requests - Responding" and "My Organization Discovery Requests - Requesting".

**My Organization Discovery Requests - Responding**

Name	PUC Activity	Requesting Organization	Responding Organization	Request Date	Due Date	Confidentiality	Response Status	Tagging
DR Set 1: Boulder Bridge LLC - American Energy	UI-01017	Boulder Bridge LLC	American Energy	2/1/2022	2/15/2022	Non-Confidential	New	 <a href="#">View details</a>
DR Set 1: OPUC - Anjums New Org	01021	OPUC	American Energy	1/12/2022	1/26/2022	Non-Confidential	New	

**My Organization Discovery Requests - Requesting**

Name	PUC Activity	Requesting Organization	Responding Organization	Request Date	Due Date	Confidentiality	Response Status	Tagging
DR Set 1: American Energy - OPUC	CP-01003	American Energy	OPUC	3/1/2022	3/15/2022	Non-Confidential	New	American Energy, OPUC
DR Set 1: American Energy - North East Electric	UI-01017	American Energy	North East Electric	2/1/2022	2/15/2022	Non-Confidential	All Responses Provided	

Next, at the bottom of the page, select the **Discovery Request Line item**.

Discovery Request Details

<b>PUC Activity</b> UI-01017	<b>Associated Action</b> ACT-21-00003
<b>Discovery Request Number</b> DR Set 1: Boulder Bridge LLC - American Energy	<b>Confidentiality</b> Non-Confidential
<b>Requesting Organization</b> Boulder Bridge LLC	<b>Requestor</b> Alex Desmond
<b>Responding Organization</b> American Energy	
<b>Request Date</b> 2/1/2022	<b>Due Date</b> 2/15/2022
<b>Description</b> —	<b>Tagging</b> —

Discovery Request Line Items

The list below may not include protected information if the user has not signed appropriate Protective Order.

Number	Confidentiality	Question	Response Status
<a href="#">Item - 1</a>	Non-Confidential	Need more PUC Activity Items	Response Requested

To respond to this item, click the **+ Create** button at the bottom of the page.

Discovery Request Line Item

Item - 1

<b>Data Request Number</b> DR Set 1: Boulder Bridge LLC - American Energy	<b>Line Item Number</b> Item - 1	<b>DR Response Status</b> Response Requested
<b>Question</b> Need more PUC Activity Items		

Discovery Request Responses

Click "Create" to submit a response for this request

Response Number	Response Type	Response	Created On	Confidentiality	Includes Documents
No Results Found					

[+ Create](#)

Enter the Initial **Response Type** and click **Next**.

The screenshot shows the 'Discovery Request Response' form. At the top, there is a navigation bar with links: Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, All Actions, All Discovery Requests, and Kaboda Sierra. The main heading is 'Discovery Request Response'. Below the heading, there is a note: 'If this response is an amendment to a previous response, please input the initial Discovery Request Response. Select "Next" to enter your response.' The 'Response Type' dropdown menu is highlighted with a red box and contains the option 'Initial Response'. Below the dropdown menu, the 'Next' button is also highlighted with a red box. At the bottom of the page, there is a footer with the Oregon Public Utility Commission logo, contact information, and links to 'About Oregon', 'PUC Public Page', 'Oregon.gov', and 'Oregon Department of Veteran's Affairs'.

Enter your **Response** in the provided text box and click **Next**.

The screenshot shows the 'Discovery Request Response' form. At the top, there is a navigation bar with links: Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, All Actions, All Discovery Requests, and Kaboda Sierra. The main heading is 'Discovery Request Response'. Below the heading, there is a note: 'Select "Next" to attach files on the next screen.' The form is divided into two columns: 'Discovery Request Line Item' and 'Question'. The 'Discovery Request Line Item' column contains 'Item - 1'. The 'Question' column contains 'Need more PUC Activity Items'. Below these columns, there is a large text box labeled 'Response' which is highlighted with a red box. The text box contains the text: 'The items you have requested have been sent over via email.' At the bottom of the page, there are two buttons: 'Previous' and 'Next', with the 'Next' button highlighted with a red box.

To add any documents associated with this response click the **Carrot** and select **Upload Files**. Once document is successfully uploaded, click **Submit**.

Organizations | PUC Activities | Events | Public Meetings | Consumer Comments | Email Lists | Organization Access Request | All Actions | All Discovery Requests | Kaboda Sierra

## Discovery Request Response

### Upload Files


Upload your documents to the appropriate folder; if you are uploading a confidential or highly confidential document, you must also upload the redacted version of the document to the Non-Confidential folder.

Confidentiality ↑	
Confidential	▼
Highly Confidential	▼
Non-Confidential	📄

Upload Files

Previous Submit

Following the submission, the **Response Status** of that Discovery Request will update to “All Responses Provided.”

[Home](#) | [Organizations](#) | [PUC Activities](#) | [Events](#) | [Public Meetings](#) | [Consumer Comments](#) | [Email Lists](#) | [Organization Access Request](#) | [All Actions](#) | [All Discovery Requests](#) | [Kaboda Sierra](#)


## My Organization Discovery Requests

can search for DR number, activity, both date fields, both org fields

### My Organization Discovery Requests - Responding

Name	PUC Activity	Requesting Organization	Responding Organization	Request Date ↓	Due Date ↑	Confidentiality	Response Status	Tagging
DR Set 1: Boulder Bridge LLC - American Energy	UI-01017	Boulder Bridge LLC	American Energy	2/1/2022	2/15/2022	Non-Confidential	All Responses Provided	
DR Set 1: OPUC - Anjams New Org	01021	OPUC	American Energy	1/12/2022	1/26/2022	Non-Confidential	New	

### My Organization Discovery Requests - Requesting


Name	PUC Activity	Requesting Organization	Responding Organization	Request Date ↓	Due Date ↑	Confidentiality	Response Status	Tagging
DR Set 1: American Energy - OPUC	CP-01003	American Energy	OPUC	3/1/2022	3/15/2022	Non-Confidential	New	American Energy, OPUC
DR Set 1: American Energy - North East Electric	UI-01017	American Energy	North East Electric	2/1/2022	2/15/2022	Non-Confidential	All Responses Provided	

Amend a Discovery Request Response

Navigate to the **User** drop down menu and click **My Organization Discovery Requests**.





To amend a response to a Discovery Request, click the **Carrot** than select **View Details**.

[Home](#) | 
 [Organizations](#) | 
 [PUC Activities](#) | 
 [Events](#) | 
 [Public Meetings](#) | 
 [Consumer Comments](#) | 
 [Email Lists](#) | 
 [Organization Access Request](#) | 
 [All Actions](#) | 
 [All Discovery Requests](#) | 
 Kaboda Sierra 

## My Organization Discovery Requests

can search for DR number, activity, both date fields, both org fields

My Organization Discovery Requests - Responding

Name	PUC Activity	Requesting Organization	Responding Organization	Request Date ↓	Due Date ↑	Confidentiality	Response Status	Tagging
DR Set 1: Boulder Bridge LLC - American Energy	UI-01017	Boulder Bridge LLC	American Energy	2/1/2022	2/15/2022	Non-Confidential	New	 View details
DR Set 1: OPUC - Anjums New Org	01021	OPUC	American Energy	1/12/2022	1/26/2022	Non-Confidential	New	

My Organization Discovery Requests - Requesting

Name	PUC Activity	Requesting Organization	Responding Organization	Request Date ↓	Due Date ↑	Confidentiality	Response Status	Tagging
DR Set 1: American Energy - OPUC	CP-01003	American Energy	OPUC	3/1/2022	3/15/2022	Non-Confidential	New	American Energy, OPUC
DR Set 1: American Energy - North East Electric	UI-01017	American Energy	North East Electric	2/1/2022	2/15/2022	Non-Confidential	All Responses Provided	



Next, at the bottom of the page, select the **Discovery Request Line item** you wish to amend.

Discovery Request Details

<b>PUC Activity</b> UI-01017	<b>Associated Action</b> ACT-21-00003
<b>Discovery Request Number</b> DR Set 1: Boulder Bridge LLC - American Energy	<b>Confidentiality</b> Non-Confidential
<b>Requesting Organization *</b> Boulder Bridge LLC	<b>Requestor</b> Alex Desmond
<b>Responding Organization *</b> American Energy	
<b>Request Date</b> 2/1/2022	<b>Due Date</b> 2/15/2022
<b>Description</b> —	<b>Tagging</b> —

Discovery Request Line Items

The list below may not include protected information if the user has not signed appropriate Protective Order.

Number	Confidentiality	Question	Response Status
<a href="#">Item - 1</a>	Non-Confidential	Need more PUC Activity Items	Response Requested

To amend this item, click the **+ Create** button at the bottom of the page.

Discovery Request Line Item

Item - 1

<b>Data Request Number</b> DR Set 1: Boulder Bridge LLC - American Energy	<b>Line Item Number</b> Item - 1	<b>DR Response Status</b> Response Requested
<b>Question</b> Need more PUC Activity Items		

Discovery Request Responses

Click "Create" to submit a response for this request

Response Number	Response Type	Response	Created On	Confidentiality	Includes Documents
No Results Found					

[+ Create](#)

Choose “Amended” as the **Response Type** and input the **Associated Response or Amendment**. Then, click **Next**.

Organizations | PUC Activities | Events | Public Meetings - | Consumer Comments | Email Lists | Organization Access Request | All Actions | All Discovery Requests | Kaboda Sierra -

## Discovery Request Response

If this response is an amendment to a previous response, please input the initial Discovery Request Response. Select "Next" to enter your response.

<b>Response Type *</b> Amendment	<b>Associated Response or Amendment *</b> RE-0001023
-------------------------------------	---

Next

**Oregon Public Utility Commission**  
Copyright © 2022. All rights reserved.

All Registered User Information is Public  
Actions Prior to 2022 Will Not Have Tagging Information  
Consumer Questions:  
puc.consumer@state.or.us

About Oregon  
[PUC Public Page](#)  
[Oregon.gov](#)  
[Oregon Department of Veteran's Affairs](#)

Enter your **Response** in the provided text box and click **Next**.

Discovery Request Response

Select "Next" to attach files on the next screen.

Discovery Request Line Item	Question
Item - 1	Need more PUC Activity Items

**Response \***

The Items you have requested have been sent over via email.

Previous **Next**

To add any documents associated with this response click the **Carrot** and select **Upload Files**. Once document is successfully uploaded, click **Submit**.

Discovery Request Response

Upload Files

Upload your documents to the appropriate folder. If you are uploading a confidential or highly confidential document, you must also upload the redacted version of the document to the Non-Confidential folder.

Confidentiality ↑

Confidential	▼
Highly Confidential	▼
Non-Confidential	▼

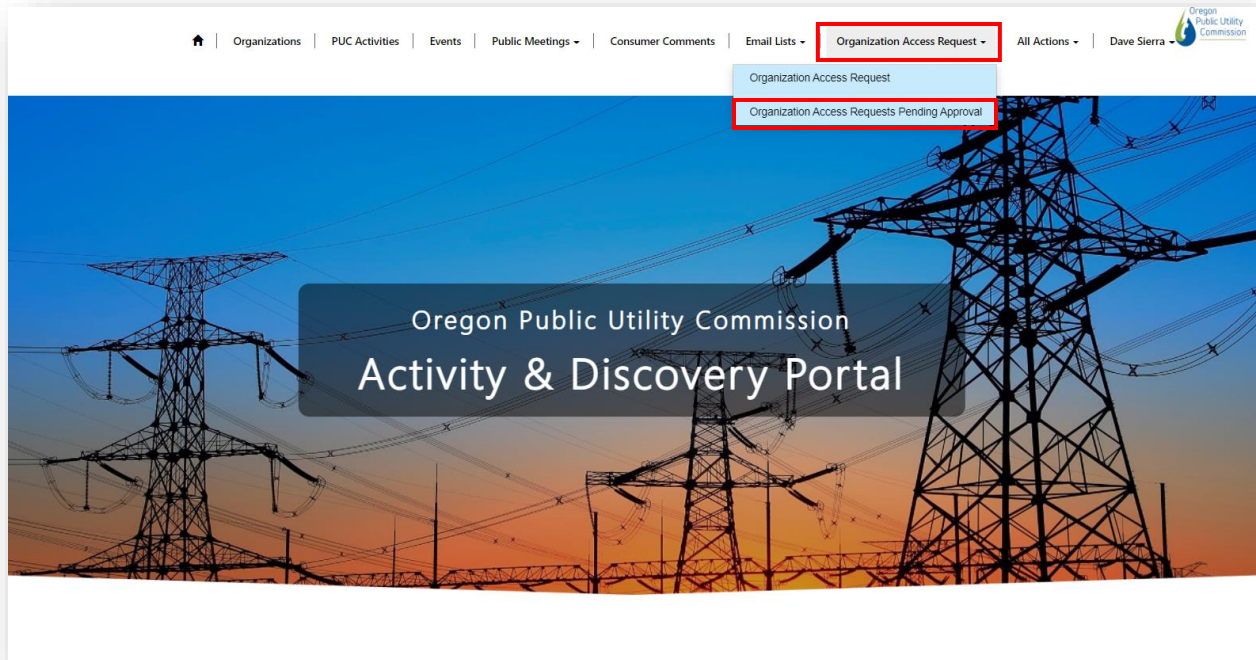
**Upload Files**

Previous **Submit**

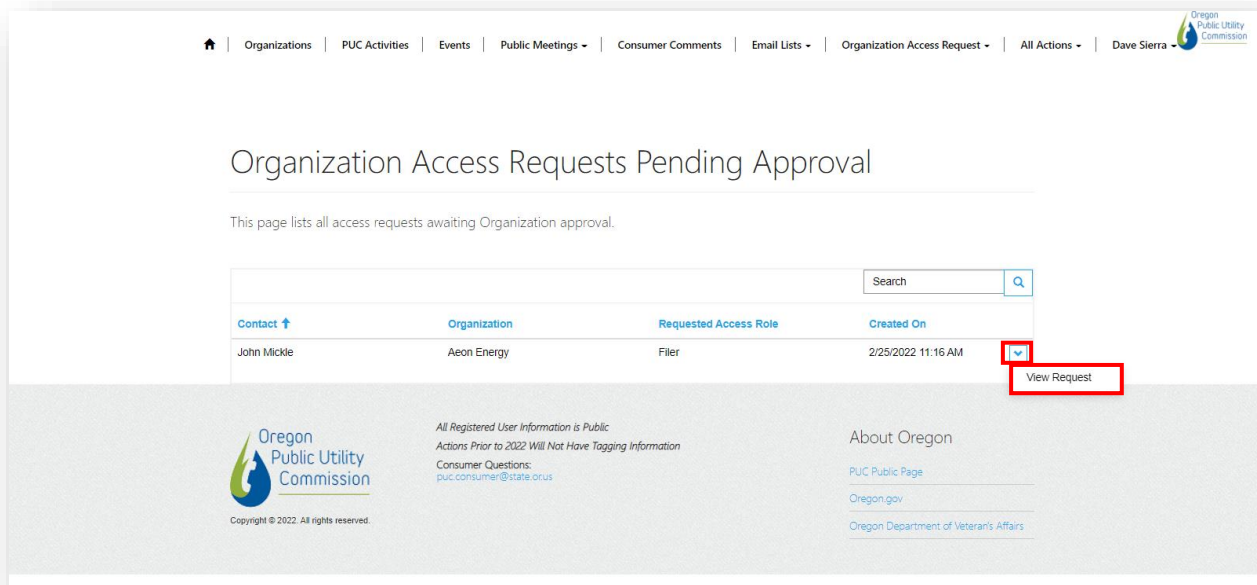
## Organization Administrator

Approve Access Requests for Your Organization

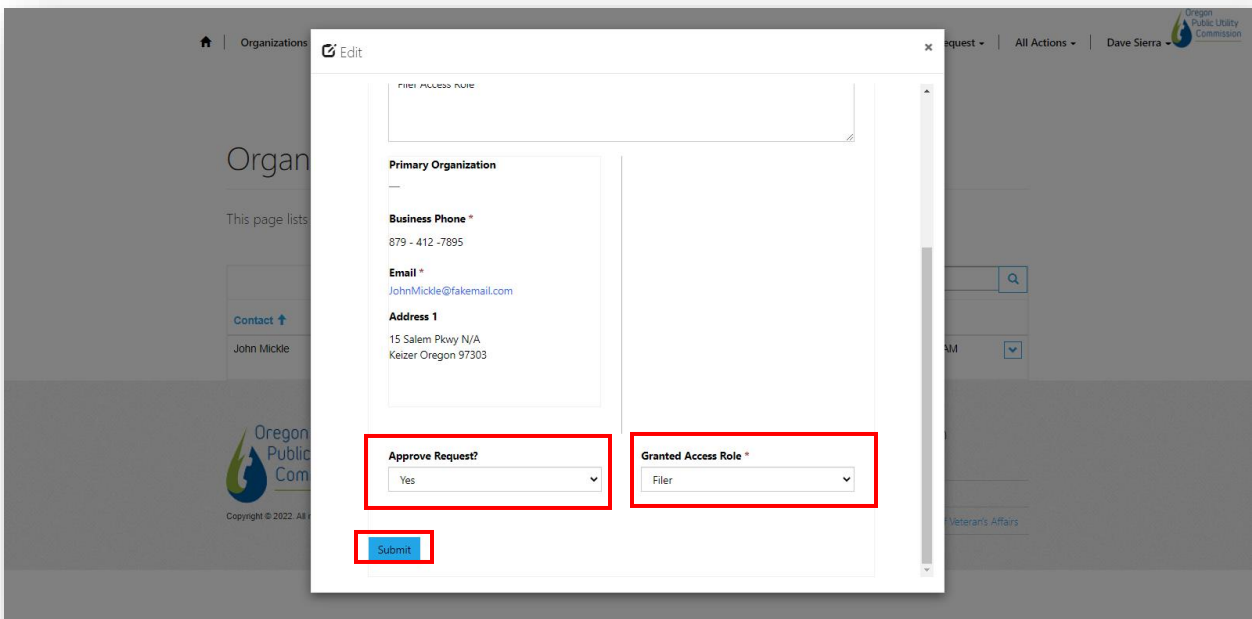
Any Access Requests submitted by members of your organization will require your approval, unless they are requests for the Organization Administrator role, which is approved by PUC. To see if you have any access requests that require approval for your organization, navigate to **Organization Access Requests** and Select **Organization Access Requests Pending Approval**.



The grid below displays all the organizations access requests pending approval. To view a record, click the **Carrot** and select **View Request**.



Review the Access Request. Once reviewed, scroll down to **Approve Request** and **Granted Access Role** and input your decision. Click **Submit**.




Edit Organization Contact Information

Navigate to the **User** drop down menu and click **My Organizations**.



Click on the **Carrot** and select **Administrator Details** to view the organization’s contact information.

[Home](#) | [Organizations](#) | [PUC Activities](#) | [Events](#) | [Public Meetings](#) | [Consumer Comments](#) | [Email Lists](#) | [Organization Access Request](#) | [All Actions](#) | [Dave Sierra](#)



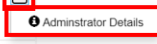


## My Organizations

### Roles

Granted Access Role	Organization ↑	Primary Organization ↓	Created On
Administrator	Aeon Energy	Yes	2/1/2022 10:49 AM
Data Requestor	Northeast	Yes	12/10/2021 2:41 PM
Data Requestor	Northeast	Yes	12/10/2021 2:48 PM
Administrator	Aeon Energy	No	2/24/2022 4:05 PM
Data Requestor	Northern Electric Corporation		10/5/2021 10:32 AM
Subscriber/View Only	South Studios		10/5/2021 9:58 AM

### Organizations

Use the dropdown menu on the right to select the details view based on your role.

Organization Name ↑	Industry ↑	Main Phone	Email	Address 1	
Aeon Energy		784-465-251		12 Salem Pkwy, Salem, Oregon, United States 12 Salem Pkwy Keizer 97303	 
Northeast	Telecommunications			87 Main Street Albany, New York 12207	
Northern Electric Corporation	Electric	789-687-1532	NoSup@fakemail.com	32 Easy St Tulsa, Oklahoma 65789	

The organization's contact information can be edited to meet the desired specifications.

Home | Organizations | PUC Activities | Events | Public Meetings | Consumer Comments | Email Lists | Organization Access Request | All Actions | Dave Sierra | Oregon Public Utility Commission

## My Organization Details (A)

### Aeon Energy

If any changes are made, click "save changes" at the bottom of the page

<b>Organization Name *</b>	<b>Organization Number</b>	<b>Industry</b>
Aeon Energy	—	—
<b>Regulation</b>		
—		

#### Contact Information - Aeon Energy

<b>Address 1: Street 1</b>		
<input type="text" value="12 Salem Pkwy, Salem, Oregon, United States"/>		
<b>Address 1: Street 2</b>		
<input type="text" value="12 Salem Pkwy"/>		
<b>Address 1: City</b>	<b>Address 1: State/Province</b>	<b>Address 1: ZIP/Postal Code</b>
<input type="text" value="Keizer"/>	<input type="text"/>	<input type="text" value="97303"/>
<b>Main Phone</b>	<b>Email</b>	<b>Fax</b>
<input type="text" value="784-465-251"/>	<input type="text"/>	<input type="text"/>
<b>Website</b>		
<input type="text"/>		



Edit Contacts in your Organization

Navigate to the **User** drop down menu and click **My Organizations**.



Click on the **Carrot** and select **Administrator Details** to view the organization's contact information.

The screenshot shows the 'My Organizations' page on the Oregon Public Utility Commission website. The page has a navigation bar at the top with links for Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, All Actions, and a user profile for Dave Sierra. Below the navigation bar is the heading 'My Organizations' and a sub-heading 'Roles'. The 'Roles' section contains a table with the following data:


Granted Access Role	Organization ↑	Primary Organization ↓	Created On
Administrator	Aeon Energy	Yes	2/1/2022 10:49 AM
Data Requestor	Northeast	Yes	12/10/2021 2:41 PM
Data Requestor	Northeast	Yes	12/10/2021 2:48 PM
Administrator	Aeon Energy	No	2/24/2022 4:05 PM
Data Requestor	Northern Electric Corporation		10/5/2021 10:32 AM
Subscriber/View Only	South Studios		10/5/2021 9:58 AM

Below the 'Roles' table is the 'Organizations' section, which includes the instruction: 'Use the dropdown menu on the right to select the details view based on your role.' The 'Organizations' table has the following data:

Organization Name ↑	Industry ↑	Main Phone	Email	Address 1
Aeon Energy		784-465-251		12 Salem Pkwy, Salem, Oregon, United States 12 Salem Pkwy Keizer 97303
Northeast	Telecommunications			87 Main Street Albany, New York 12207
Northern Electric Corporation	Electric	789-687-1532	NoSup@fakemail.com	32 Easy St Tulsa, Oklahoma 65789

A red box highlights the dropdown menu for the 'Aeon Energy' organization, which is currently set to 'Administrator Details'.

Scroll to bottom of the page and click on a **contact** in the **Company Contacts** grid.

Organizations | PUC Activities | Events | Public Meetings | Consumer Comments | Email Lists | Organization Access Request | All Actions | Dave Sierra 

### Contact Information - Aeon Energy

**Address 1: Street 1**

**Address 1: Street 2**

**Address 1: City**  **Address 1: State/Province**  **Address 1: ZIP/Postal Code**

**Main Phone**  **Email**  **Fax**

**Website**

### Company Contacts - Aeon Energy

Click on a Contact's name to view/edit their details. You may edit the details of any Contact when you are the Administrator of their Primary Organization.  
Select 'Remove Contact' from the right hand dropdown menu to remove the Contact's Role with this Organization.

Contact ↑	Role	Primary Organization	
<a href="#">Dave Sierra</a>	Portal Organization Administrator	Aeon Energy	▼
<a href="#">Dave Sierra</a>	Portal Organization Administrator	Aeon Energy	▼
<a href="#">John Mickle</a>	Portal Organization Filer	Aeon Energy	▼

[Save Changes](#)

Make Changes to the **Contact** record and click **Save Changes**.

Organizations | PUC Activities | Events | Public Meetings | Consumer Comments | Email Lists | Organization Access Request | All Actions | Dave Sierra | Oregon Public Utility Commission

## Contact Details

If any changes are made, click "save changes" at the bottom of the page

<b>First Name</b> John	<b>Middle Name</b> 	<b>Last Name *</b> Mickle
<b>Business Phone *</b> 879 - 412 -7895	<b>Email *</b> JohnMickle@fakemail.com	<b>Primary Organization</b> Aeon Energy
<b>Address 1: Street 1</b> 15 Salem Pkwy		
<b>Address 1: Street 2</b> N/A		
<b>Address 1: City</b> Keizer	<b>Address 1: State/Province</b> Oregon	<b>Address 1: ZIP/Postal Code</b> 97303
<b>Contact Notes</b>  		

**Granted Access Requests**

Granted Access Role	Organization ↑	Primary Organization ↓	Created On
Filer	Aeon Energy	Yes	2/25/2022 11:18 AM

[Save Changes](#)

## Remove a Contact's Access to your Organization

Organization Administrators have the ability to remove contacts from their organization entirely, or remove a particular role from a contact at their organization.

Navigate to the **User Name** drop down menu and click **My Organizations**.



Click on the **carrot** and select **Administrator Details** to view the organization’s contact information. If you do not see Administrator Details as an option, this means you require Administrator access to this organization before you can remove contacts from your organization.

The screenshot shows the 'My Organizations' page with the following data:

### Roles

Granted Access Role	Organization ↑	Primary Organization ↓	Created On
Administrator	Aeon Energy	Yes	2/1/2022 10:49 AM
Data Requestor	Northeast	Yes	12/10/2021 2:41 PM
Data Requestor	Northeast	Yes	12/10/2021 2:48 PM
Administrator	Aeon Energy	No	2/24/2022 4:05 PM
Data Requestor	Northern Electric Corporation		10/5/2021 10:32 AM
Subscriber/View Only	South Studios		10/5/2021 9:58 AM

### Organizations

Use the dropdown menu on the right to select the details view based on your role.

Organization Name ↑	Industry ↑	Main Phone	Email	Address 1
Aeon Energy		784-465-251		12 Salem Pkwy, Salem, Oregon, United States 12 Salem Pkwy Keizer 97303
Northeast	Telecommunications			87 Main Street Albany, New York 12207
Northern Electric Corporation	Electric	789-687-1532	NoSup@Fakemail.com	32 Easy St Tulsa, Oklahoma 65789

The dropdown menu for 'Aeon Energy' is open, showing the option 'Administrator Details'.

Scroll to bottom of the page, click on the **carrot** in the **Company Contacts** grid beside the contact/role you wish to remove, and select **Remove Contact**.

If a contact appears in the grid more than once, this means they have multiple roles at your organization. You can remove a specific role from a contact by only removing that line item, or you can remove the contact entirely by removing all line items for that contact.

The screenshot shows a web application interface with a navigation bar at the top containing links for Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, All Actions, and Dave Sierra. Below the navigation bar, there are two main sections: 'Contact Information - Aeon Energy' and 'Company Contacts - Aeon Energy'.

The 'Contact Information' section contains several form fields:

- Address 1: Street 1:** 12 Salem Pkwy, Salem, Oregon, United States
- Address 1: Street 2:** 12 Salem Pkwy
- Address 1: City:** Keizer
- Address 1: State/Province:** (empty)
- Address 1: ZIP/Postal Code:** 97303
- Main Phone:** 784-465-251
- Email:** (empty)
- Fax:** (empty)
- Website:** (empty)

The 'Company Contacts' section includes a brief instruction: "Click on a Contact's name to view/edit their details. You may edit the details of any Contact when you are the Administrator of their Primary Organization. Select 'Remove Contact' from the right hand dropdown menu to remove the Contact's Role with this Organization."

Contact ↑	Role	Primary Organization	
<a href="#">Dave Sierra</a>	Portal Organization Administrator	Aeon Energy	⌵
<a href="#">Dave Sierra</a>	Portal Organization Filer	Aeon Energy	⌵
<a href="#">John Mickle</a>	Portal Organization Filer	Aeon Energy	⌵

A red box highlights the 'Remove Contact' option in the dropdown menu for the second Dave Sierra entry.

## Consumer Comments

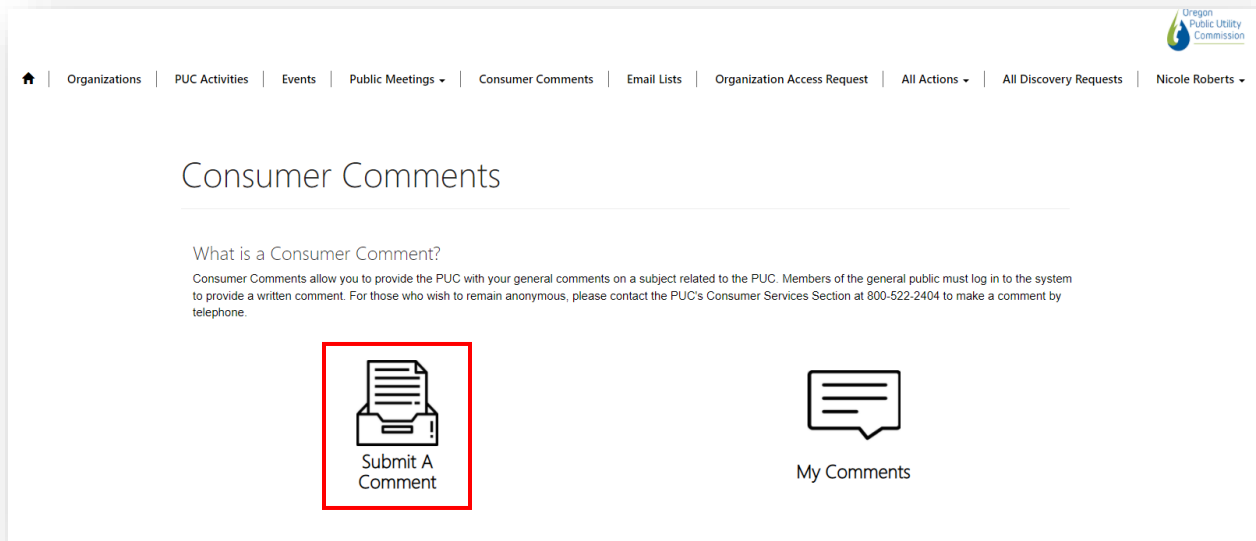
Submit a Consumer Comment

Click the **Consumer Comments** tab.

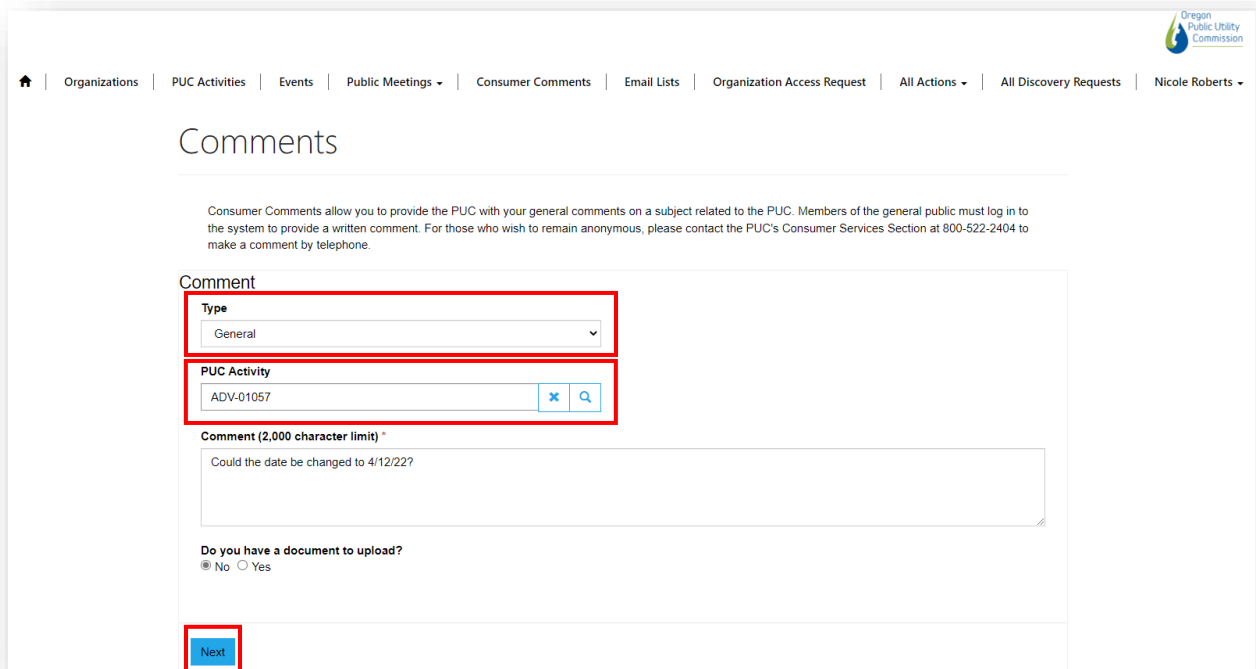




Click on **Submit A Comment**.



On the record, update the **Type** to General and if this comment is related to a PUC Activity, you can specify here. Input your comment, and click **Next**.



Once submitted, Comment will display in the **My Comments** grid.

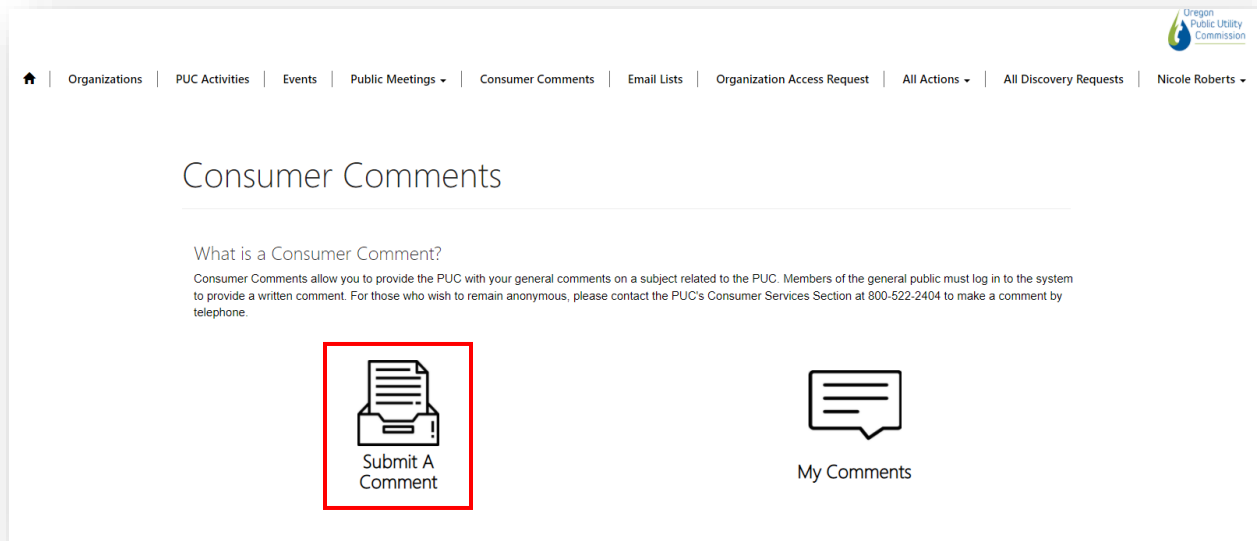
The screenshot shows the Oregon Public Utility Commission website. The navigation bar includes: Home, Organizations, PUC Activities, Events, Public Meetings, Consumer Comments (highlighted with a red box), Email Lists, Organization Access Request, All Actions, All Discovery Requests, and Nicole Roberts. The main content area features a 'My Comments' heading (also highlighted with a red box) and a table of comments.

Type	PUC Activity	Comment	Created On
General	ADV-01057	Could the date be changed to 4/12/22?	3/2/2022 10:13 AM
Public Meeting	ADV-01016	this is a consumer comment that tara and antara submitted to test this process	1/5/2022 3:08 PM

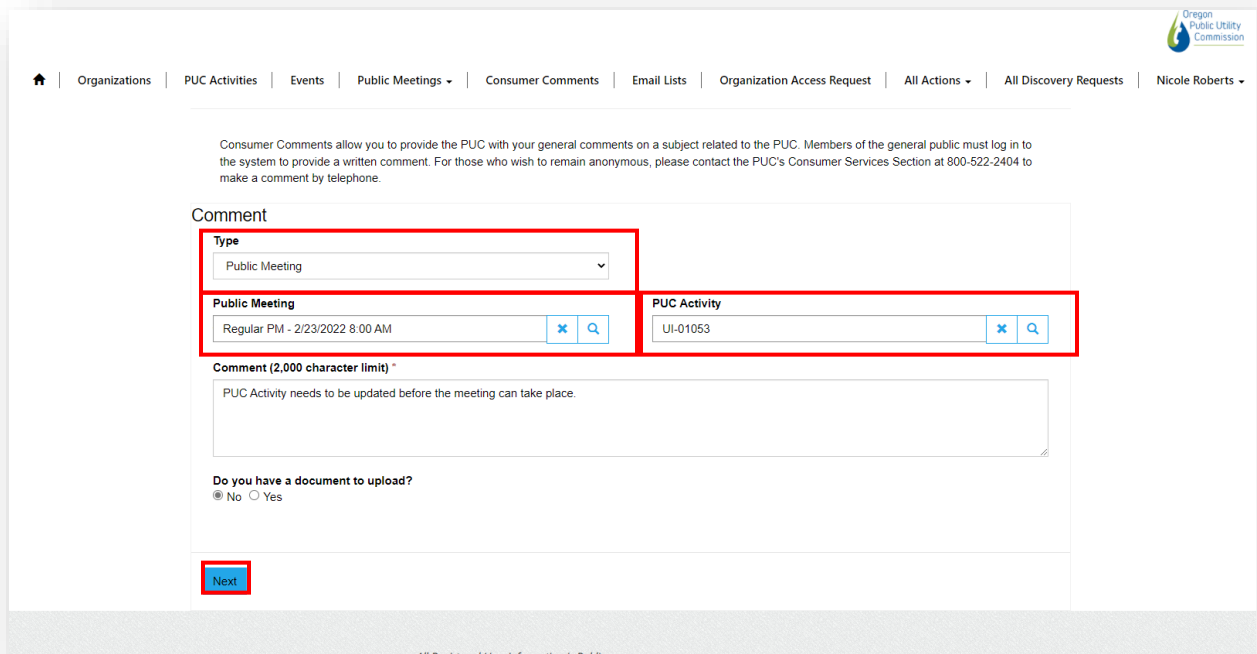
Submit a Consumer Comment Related to a Public Meeting  
Click the **Consumer Comments** tab.

The screenshot shows the Oregon Public Utility Commission website. The navigation bar includes: Home, Organizations, PUC Activities, Events, Public Meetings, Consumer Comments (highlighted with a red box), Email Lists, Organization Access Request, All Actions, All Discovery Requests, and Nicole Roberts. Below the navigation bar is a large banner image of power lines at sunset with the text: Oregon Public Utility Commission Activity & Discovery Portal.

Click on **Submit A Comment**.



On the record, update the **Type**, **Public Meeting**, and **PUC Activity**. Once added, input your comment, and click **Next**.



Once submitted, the comment will display in the **My Comments** grid.

The screenshot shows the Oregon Public Utility Commission website. At the top right is the logo for the Oregon Public Utility Commission. Below the logo is a navigation menu with the following items: Home, Organizations, PUC Activities, Events, Public Meetings, Consumer Comments, Email Lists, Organization Access Request, All Actions, All Discovery Requests, and Nicole Roberts. The main content area features a heading 'My Comments' enclosed in a red rectangular box. Below this heading is a table with the following data:

Type	PUC Activity	Comment	Created On	
Public Meeting	UI-01053	PUC Activity needs to be updated before the meeting can take place.	3/2/2022 11:01 AM	▼
General	ADV-01057	Could the date be changed to 4/12/22?	3/2/2022 10:13 AM	▼
Public Meeting	ADV-01016	this is a consumer comment that tara and antara submitted to test this process	1/5/2022 3:08 PM	▼

## Create Email List

Click **Email Lists** from sitemap.

The screenshot displays the Dynamics 365 interface for the 'ADS' application. The left-hand navigation pane includes sections for 'General', 'Filing Center', 'Discovery', 'Calendar', and 'Communication'. The 'Email Lists' option under the 'Communication' section is highlighted with a red rectangular box. The main content area is divided into two sections: 'Actions Pending AAG Review' and 'My Assigned Actions', both featuring data tables with search and filter options.

**Actions Pending AAG Review**

Name	PUC Activity	Action Group	Action Type	Submitted By	Reviewing AAG	Submission Date
ACT-22-00024	ADV-01016	ORDER	Order - CP Grant	Tara Duke	Dave Sierra	2/11/2022
ACT-21-00083	UI-01047	FILINGS/PLEADING: Amended (Applicati		Patricia Sorbi	Dave Sierra	2/11/2022
ACT-22-00115	UI-01053	APPEALS - CA	Appeal	Dave Sierra	Dave Sierra	2/1/2022
ACT-22-00089	UI-01017	RULINGS/MEMORA	LAW JUDGE CONFE	Antara Chowdhury	Dave Sierra	1/24/2022

**My Assigned Actions**

Name	Action Group	Action Type	Submission Date	Filing Status
ACT-22-00064	FILINGS/PLEADINGS - F	INITIAL (APPLICATION, COMPLAINT, PET	1/21/2022	Accepted
ACT-21-00084	FILINGS/PLEADINGS - F	BANKRUPTCY	12/15/2021	Conditionally Accepted

Click **New** from Ribbon.

The screenshot shows the Microsoft Dynamics 365 interface for the 'ADS' entity. The ribbon at the top includes buttons for 'Show Chart', 'Documents', 'New' (highlighted with a red box), 'Delete', 'Refresh', 'Email a Link', 'Flow', 'Run Report', and 'Excel Templates'. The main area displays a table titled 'Active Email Lists\*'. The table has columns for 'PUC Activity Number', 'Type', 'Name', 'Description', 'Last Used Date', and 'Modified On'. The table contains 18 rows of data, including entries for 'WGP-01045', 'UI-01054', 'UI-01053', 'UI-01051', and 'UI-01048'. The left sidebar shows navigation options like 'Contacts', 'Organizations', 'Users', 'Filing Center', 'PUC Activities', 'Actions', 'Consumer Comm...', 'Access Requests', 'Discovery', 'Discovery Requests', 'Calendar', 'Events', 'Public Meetings', 'ALJ Schedules', 'Communication', 'Emails', 'Email Lists', and 'Email Templates'. The bottom status bar shows 'ADS' and '1 - 50 of 254'.

PUC Activity Number	Type	Name	Description	Last Used Date	Modified On
WGP-01045	Staff List	PUC Activity Staff List	---	---	1/21/2022 9:28 AM
WGP-01045	ListServ	PUC Activity Service List	---	---	1/21/2022 9:28 AM
WGP-01045	Custom Subscription List	PUC Activity Subscription List	---	---	1/21/2022 9:28 AM
UI-01054	ListServ	PUC Activity Service List	---	---	2/8/2022 11:45 AM
UI-01054	Custom Subscription List	PUC Activity Subscription List	---	---	2/8/2022 11:45 AM
UI-01054	Staff List	PUC Activity Staff List	---	---	2/8/2022 11:45 AM
UI-01053	Custom Subscription List	PUC Activity Subscription List	---	---	2/1/2022 2:15 PM
UI-01053	Staff List	PUC Activity Staff List	---	---	2/1/2022 2:15 PM
UI-01053	ListServ	PUC Activity Service List	---	---	2/1/2022 2:15 PM
UI-01051	Custom Subscription List	PUC Activity Subscription List	---	---	1/24/2022 11:43 AM
UI-01051	Staff List	PUC Activity Staff List	---	---	1/24/2022 11:43 AM
UI-01051	ListServ	PUC Activity Service List	---	---	1/24/2022 11:43 AM
UI-01048	Custom Subscription List	PUC Activity Subscription List	---	---	1/23/2022 6:27 PM
UI-01048	Staff List	PUC Activity Staff List	---	---	1/23/2022 6:27 PM
UI-01048	ListServ	PUC Activity Service List	---	---	1/23/2022 6:27 PM

A new **Email List** record will open. Input the name, type, industry (if applicable), description, and tagging information.

The screenshot shows a software interface for creating a new email list. At the top, there is a navigation bar with icons for back, home, documents, save, save & close, new, and flow. Below this is the title 'New Email List' and a user profile for 'Dave Sierra' with fields for Owner, Name, PUC Activity, and Last Used Date. The 'General' section contains several input fields: 'Name', 'Type', 'Industry', 'Description', and 'Tag'. A text box at the bottom contains the instruction: 'Click "New List Contact" button to add contacts to this email list'.

Click **Save**. Once the Email List is saved, contacts can be added to the list.

The screenshot shows a software interface for creating a new email list. At the top, a toolbar contains several icons and labels: a back arrow, a home icon, 'Documents', a 'Save' button (highlighted with a red box), 'Save & Close', '+ New', and 'Flow' with a dropdown arrow. Below the toolbar, the main content area is titled 'New Email List - Unsaved'. On the right side of this area, there are several tabs: 'Dave Sierra' (Owner), 'ALJ Notification List' (Name), '---' (PUC Activity), and '---' (Last Used Date) with a dropdown arrow. The 'General' tab is selected and underlined. The form contains the following fields:

- Name:** A text input field containing 'ALJ Notification List'.
- Type:** A dropdown menu with 'Process List' selected. To its right is an 'Industry' field with '---' selected.
- Description:** A text input field containing 'List of ALJs who will receive notifications regarding orders.'
- Tag:** A section with three tags: 'ALJ x', 'Order x', and 'PUC x'. Below the tags is an empty text input field.

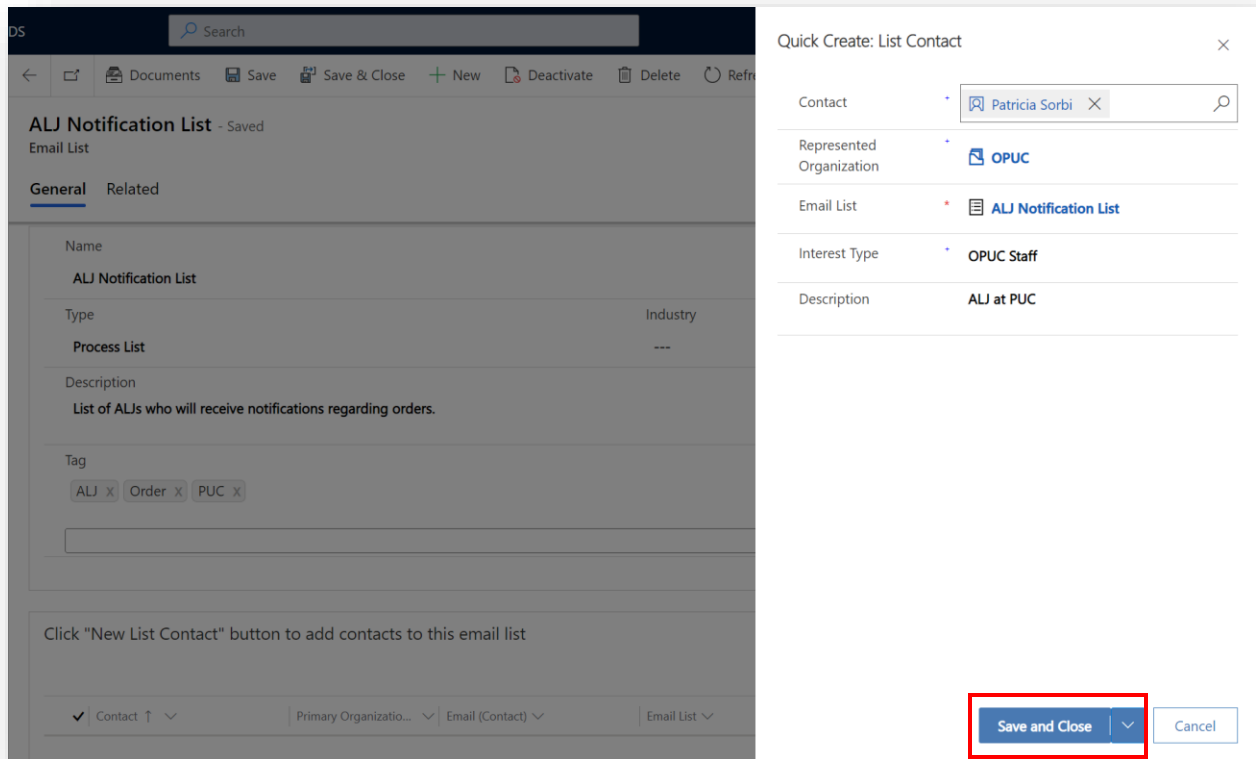
At the bottom of the form, there is a text box containing the instruction: 'Click "New List Contact" button to add contacts to this email list'.



Click **+ New List Contact** to add a new contact to this Email List.

The screenshot displays the 'ALJ Notification List' interface. At the top, there is a navigation bar with options like 'Documents', 'Save', 'New', 'Deactivate', 'Delete', 'Refresh', 'Check Access', 'Assign', 'Share', 'Email a Link', and 'Flow'. Below this, the title 'ALJ Notification List' is shown with 'Email List' underneath. The owner is listed as 'Dave Sierra'. There are tabs for 'Name', 'PUC Activity', and 'Last Used Date'. The 'General' tab is selected, showing details such as Name ('ALJ Notification List'), Type ('Process List'), Industry ('---'), and Description ('List of ALJs who will receive notifications regarding orders.'). There are also tags for 'ALJ', 'Order', and 'PUC'. Below the details, a message says 'Click "New List Contact" button to add contacts to this email list'. A toolbar contains a '+ New List Contact' button (highlighted with a red box), a 'Refresh' button, and a 'Flow' dropdown. Below the toolbar are several filter dropdowns: 'Contact', 'Primary Organization', 'Email (Contact)', 'Email List', 'Interest Type', 'Signed Protect...', 'Waive Paper S...', and 'Organization'. The main content area is empty, displaying 'No data available.'

A quick create form will appear. Input contact information and then click **Save and Close**.



Once added to the email list, the contact will appear in the grid below. Now this contact will receive any emails sent to this list.

The screenshot shows a web application interface for managing an 'ALJ Notification List'. At the top, there is a navigation bar with icons for Documents, Save, Save & Close, New, Deactivate, Delete, Refresh, Check Access, Assign, and Share. Below this, the page title is 'ALJ Notification List - Saved' and it identifies the owner as 'Dave Sierra'. There are tabs for 'General' and 'Related', with 'General' selected. The main content area displays details for the list: Name 'ALJ Notification List', Type 'Process List', Industry '---', and Description 'List of ALJs who will receive notifications regarding orders.' There are also tags 'ALJ', 'Order', and 'PUC'. Below the details, there is a section titled 'Click "New List Contact" button to add contacts to this email list' with a '+ New List Contact' button and a 'Refresh' button. At the bottom, a table displays a list of contacts. The first row is highlighted with a red border and contains the following data:

✓ Contact ↑ ↓	Primary Organizatio... ↓	Email (Contact) ↓	Email List ↓	Interest Type ↓	Signed Pro... ↓	Waive Pape... ↓	Organ
Patricia Sorbi	OPUC	patriciasorbi@aeonnexus.com..	ALJ Notification List	OPUC Staff	No	No	OPUC

## Subscribing to an Email list via Portal

If the Email list created is a Custom Subscription List or Industry List, the list can be subscribed to by the public via the OPUC Portal.

Navigate to the **Email List** Tab on the OPUC Portal.

Home | Organizations | PUC Activities | All Actions | Events | Public Meetings | Consumer Comments | **Email Lists** | Dave Sierra

Email Lists  
Manage Email Lists

### Email Lists

#### Subscription List

Click subscription list Name to subscribe, unsubscribe, or view the subscribers of a particular list.

Search [ ] [ ] [Download]

Name ↑	PUC Activity	Description	Tags
AB-2 suscription list			[ ]
ADV 001 Subscription List	ADV 001		[ ]
ADV 002 Subscription List	ADV 002		[ ]
ADV 003 Subscription List	ADV 003		[ ]
ADV 004 Subscription List	ADV 004		[ ]
ADV 005 Subscription List	ADV 005		[ ]

Click the **Carrot** and select **View Details**.

Home | Organizations | PUC Activities | All Actions | Events | Public Meetings | Consumer Comments | Email Lists | Dave Sierra

### Subscription List

Click subscription list Name to subscribe, unsubscribe, or view the subscribers of a particular list.

Search [ ] [ ] [Download]

Name ↑	PUC Activity	Description	Tags
AB-2 suscription list			[ ]
ADV 001 Subscription List	ADV 001		[ ]
ADV 002 Subscription List	ADV 002		[ ]
ADV 003 Subscription List	ADV 003		[ ]
ADV 004 Subscription List	ADV 004		[ ]
ADV 005 Subscription List	ADV 005		[ ]
ADV 10 Subscription List	ADV 10		[ ]
AR 1001 Subscription List	AR 1001		[ ]

Next, click **Subscribe**.

The screenshot shows the Oregon Public Utility Commission website. The navigation bar includes links for Organizations, PUC Activities, All Actions, Events, Public Meetings, Consumer Comments, Email Lists, and Dave Sierra. The main heading is 'Subscription List Details'. Below this, a message states: 'After subscribing, the Contacts list can take several minutes to update. Refresh the page after a few minutes or navigate to the "My Email Lists" page to confirm you have been added to the list.' A red 'Subscribe' button is visible. The details section shows the following information:

Name	Description	Tag
AB-2 suscription list	—	—

Below this is a 'Contacts' section with a table:

Contact ↑	Organization	Email (Contact)	Interest Type
Antara Chowdhury		antarachowdhury@aeonnexus.com	
Bryan Culver		test3@test.com	