

OCR ERF Instructions

***The OCR encourages users to open and upload documents using an individual ERF account. Please use the following instructions to open an individual ERF account and upload documents to ERF:**

How to Open an ERF Account:

1. Go to the Electronic Records Filing (ERF) website at <https://apps.psc.wi.gov/ERF/ERF/ERFhome.aspx>. Click on Account Management, then click the Create New Individual Account link under the Logon ID and Password boxes. Complete and submit the form to set up a username, logon ID, and password. The username is your name that will appear with your uploaded ERF documents. The logon ID and password is what you will enter to login into ERF. Next, go to instructions below for how to upload documents to ERF.

How to Upload Documents to ERF:

1. **Note: ERF only accepts pdf and Excel files.** For Excel files, if it is not a working spreadsheet (if all that is needed is the document image), then it should be filed in pdf format rather than Excel. Adobe Acrobat is the industry standard for creating pdf files to upload to ERF; however, there are other pdf writers available. Before uploading a pdf file to ERF, check the pdf document properties. Right click on the pdf, select Properties, then go to the Security tab. The Security Method must be set to No Security and Document Restriction Summary must be set to Allowed for all. If the Security tab is not set correctly, the document will not be accepted.

2. Once your logon ID and password are set up, go back to the ERF website link <https://apps.psc.wi.gov/ERF/ERF/ERFhome.aspx>. Click on Upload Document. Enter in your logon ID and password if you are not already logged in. Do not be alarmed if you get a Security Certificate alert. Our website is safe. Please continue. Once on the ERF upload screen, click on Public under Upload Documents.

3. If this is a new petition in which a docket number has not been set up yet, click on Existing Service Provider/New Docket Application. To find the utility id to enter, go to <https://apps.ocr.wi.gov/APPS/OCRapps/docket/search.aspx>. A list of active docket railroads and water carriers four digit id numbers will be listed here. Enter this four digit id number in ERF where it says Utility ID and click on Check Utility ID button.

4. If a docket number has already been set up, enter in the existing docket number under Docket ID and click on Check Docket button.

5. After clicking on Check Utility ID or Check Docket button, the railroad/water carrier name or docket title will appear in red on the right. If you forget to click these buttons, your documents will not upload.

6. Click on the Choose File button, select the pdf or Excel document you want uploaded to ERF from your computer, and click Open. Your file name should now appear to the right of this button, along with this file size listed further to the right.

7. Select the Document Type on the drop down menu. Then type in the title of the document under Description. If the document type or description is not specified, the document will not upload. See the following link for common ERF document type definitions. Note-This document mentions the PSC agency; the OCR uses these same ERF document types. If you have a question about which document type to use, please contact the OCR by email at OCR@wisconsin.gov. <https://apps.psc.wi.gov/ERF/ERF/documents/ERF%20Document%20Type%20Definitions.pdf>

8. Continue to add any additional pdf files you want to upload. You can add up to 10 files. Each individual file can be up to 20 MB; the limit for uploading 10 files at once is 100 MB. The individual file size is listed to the right of each upload to the left of the Remove file button. The total file size is listed above the Upload button. If ERF users go over the file upload limits, the file(s) will not be uploaded. If a file is too large to be uploaded, it can be split into smaller files. If you need to remove a file, click where it says Remove File in blue.

9. Once all the documents you want to upload have been added, hit the Upload button. If you need to cancel your upload for any reason, hit the Cancel button to the right of the Upload button. After clicking on the Upload button, you should get a message on the screen that your document(s) has/have been uploaded to ERF.

How to Subscribe to a Docket:

1. If you would like to receive an email notification for ALL documents filed in a docket, please enter the docket number and your email address, and click the Subscribe button at the following link: <https://apps.ocr.wi.gov/APPS/OCRapps/ERFEZsubscription/subscribe.aspx>

2. If you would like to receive email notifications when SPECIFIC documents are filed in ERF for a specific railroad, water carrier, or docket number:

*On the main ERF screen after logging in, click on Subscription Profile under the heading Subscription on the side menu.

*Click the Create New Subscription button. Choose the specific information you want to subscribe to.

*View the results of your subscription before saving by clicking the View Subscribe Result button.

*Click the Save Subscribe List button to activate your subscription.

*Click on Subscription Profile under the heading Subscription on the main ERF screen after logging in. Click on the links to edit or delete a subscription.

How to retrieve my ERF logon ID or password if I forget it:

Go to the Electronic Records Filing (ERF) website at

<https://apps.psc.wi.gov/ERF/ERF/ERFHome.aspx>. Click on Account Management. Under the Logon ID and Password boxes, click on the link for Change/Forget Password or Retrieve Logon ID.

What to do if I get locked out of my ERF account:

If users enters in the wrong logon ID or password too many times, they may get locked out of their ERF account. If this happens, go to the Electronic Records Filing (ERF) website at <https://apps.psc.wi.gov/ERF/ERF/ERFHome.aspx>. Click on Account Management. Under the

Logon ID and Password boxes, click on the link for Change/Forget Password or Retrieve Logon ID. After trying to change/reset your password and logging back in with your new password, if you are still locked out of your account, please contact the OCR via email at OCR@wisconsin.gov for assistance.

How to update my ERF username, logon ID, password, email address, mailing address, or phone number:

*On the main ERF screen after logging in, under the side menu heading User Maintenance, users can update their ERF account password or update ERF profile info such as username that appears in ERF next to uploaded ERF documents, logon ID, email address, mailing address, and telephone number.

ERF other helpful info:

*The electronic version will be the official copy of a filing. Generally, no paper documents are required of filers; the filing of paper documents is intentionally discouraged except where absolutely necessary. If a paper copy is required, filers will be notified.

*The time of service on the OCR is the time a submitter uploads a file to ERF, shown on the date/time stamp on the electronic file in the upper right hand corner.

*Staff of the OCR will review the documents uploaded to ERF and approve or reject them. When an ERF filing is accepted or rejected, the submitter will be notified via email. The email will include the document name, document type, received date, and file status. If a filing is rejected, the rejection reason will be included in the email.

*Appeals due to missed ERF filing deadlines caused by technical problems are decided by the Administrative Law Judge.

*To open and view pdf documents on the OCR website, users can do a free download of Adobe Acrobat Reader.

*On the ERF main screen after logging in, under the side menu heading Check Uploaded Status, users can view their pending, accepted, and rejected ERF documents.

For technical assistance with ERF, please contact the OCR via email at OCR@wisconsin.gov.