Investor Owned Utility Annual Report System - General Help File
Last Updated: 8/8/19

PSC ANNUAL REPORT HELP DESK

PSCIOUAnnualReports@wisconsin.gov

Web address for testing: http://apps.psc.wi.gov/vs2017/IOU_ARS/Logon.aspx

1. **Do not use the back button.**

2. **Use Internet Explorer to launch the website.**

3. **Fill out the schedules in the Suggested Order on the Schedule Listing.**
   Many schedules contain information that flows to or from a different schedule. If you try complete the schedules out of order you may encounter schedule checks that prevent you from saving your work.

4. **Save Early and Often.**
   Save frequently while working on a schedule. The system will not prompt you to save. The only times the system will automatically save your data is when you insert or delete an item on the schedules that allow inserts and deletes.

5. **Read the Schedule Headnotes**.
   The headnotes at the top of the schedule provide clarifying information for completing the schedule, please read them.

6. **Footnotes**
   a. Every schedule has a General Footnote for entering miscellaneous notes.

   b. When you click the schedule Footnote hyperlink, the system checks for items that require an explanation. If such items exist additional text entry boxes will appear with the General Footnote. All the additional items must have an explanation before the report can be submitted.

   c. Every footnote has a unique number. If you have a schedule that requires multiple footnote explanations, you may see footnote id numbers such as 12, 560, and 5002 all in the same schedule. This is normal.

7. **Derived Values (Hover over cell)**
   Hover over a cell to see what schedule a derived value comes from.

8. **You must move off the cell for the totals to recalculate.**
   If you change a value in a cell, the system will not recalculate the totals/calculated values until you move off the cell.

9. **Last Year Data not imported for all schedules.**
   Due to incomplete data and schedule modifications, last year's data could not be imported into certain schedules. Those schedules will need to be rekeyed for the 2018 annual report year. The 2018 data will feed forward into the 2019 and subsequent annual report years.

10. **Rows with None as description.**
    Some schedules have placeholder rows with None as the description. If you add another item to that account/category, you will need to delete the None row.

11. **Schedule Listing Sorting and Filtering**

    The schedule list can be sorted by clicking the column headers. You can also filter/restrict the schedules that appear in the list by selecting a section in the drop down box located in the top left corner of the Schedule Listing.

    Show Schedules in | All Sections ▽ |

12. **Schedule Status**
    a. To change a schedule status, you must open the schedule, change the status and then click Save or Save and Return.

    b. There is no programmatic difference between Not Started and In Progress. These options are provided for your convenience.

    c. Schedules may have multiple sets of edit checks. Some edit checks are dependent on the schedule status.

    d. All schedules must be set to Completed before the annual report can be submitted to the Public Service Commission. The schedule status will not save until you click the Save or Save and Return button.

    e. If you need to correct errors or edit data on a completed schedule, change the status back to In Progress and click Save, then make the changes. After you update the data, change the status back to Completed and click Save.

13. **Edit Checks**
    a. All edit checks must be corrected before the report can be submitted to the PSC.

    b. If the footnote id is 0 a value must be corrected in the schedule.

    c. If the footnote id is not zero, then an explanation must be entered in the schedule footnote.

14. **Zoom**
If an entire schedule does not fit on your computer screen and scrolling is difficult, consider using the browser's zoom feature to shrink the schedule. This may enable you to view the entire schedule without scrolling.

Completing and Submitting an Annual Report

1. Run and Clear Edit Checks
Before you can submit the annual report you must run the edit check listing from the Schedule Listing page. All edit checks must be cleared before the report can be submitted.

2. *Print Report* (Optional)
If you would like a PDF copy of the annual report you can click the Print Report hyperlink on the Schedule Listing page or wait until the report appears on the PSC web site. *NOTE: Requests via the Print Report hyperlink are processed every hour (including weekends and evenings).*

3. Submit Annual Report to PSC

a) When you are ready to send the report to the PSC, click the Submit Annual Report to PSC hyperlink on the Schedule Listing page.

b) Type your name and email in the boxes and click the Send button.

c) After you click the button, the system will display either a confirmation or failure screen. If you see the confirmation screen, your report has been received by the PSC. If you do not see the confirmation screen, you report has NOT been received by the PSC.

Public Service Commission of Wisconsin

Investor Owned Utility Annual Report System

Congratulations! Your annual report has been submitted successfully.

You may close the browser or go to the Logon Page to work on a different report.

Return to the Logon Page

NOTE: Reports should be posted on the PSC website approximately one working day after they are submitted.

Filing an Amended Annual Report
If you need to file an amended annual report before the filing deadline, simply log into the annual report system and select one of the options.

1. Modify and refile the most recent annual report.
   This option makes a copy of the last report submitted by the utility and allows the user to make changes to that report's data. The user will need to change the data and then rerun the edit checks and resubmit the annual report.

2. Create a new annual report.
   This option recreates the initial annual report for the filing year. The previous year's data will be populated, but nothing else. This option should only be used if the submitted annual report was so erroneous that the user has to start over from scratch.

Public Service Commission of Wisconsin

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Create New Report

What would you like to do?

I would like to modify and refile the most recent annual report.

I would like to create a new annual report.

Password Retrieval

TBD