GET TO KNOW

GOVLINK

# Georgia Public Service Commission

## Internal User Guide

# Welcome

## Welcome to GovLink!

This guide will help you use GovLink quickly and successfully, as well as give you an easy point of reference for those actions you may not perform every day.

This guide is a compliment to the videos you can watch at https://support.govlink.us/category/public-service-commission

Bookmark that page so you can visit often – we add new material as GovLink evolves.

Please ask questions and share your thoughts with us:
Chat online at https://public-service-commission.govlink.us
(Monday – Friday, 8:00 AM-5:00 PM MST)

Email to info@govlink.us
Call 844-LUV-4-GOV
(Monday – Friday, 8:00 AM-5:00 PM MST)

We're so excited to help you get the most out of GovLink and look forward to working with you!

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# Login Information

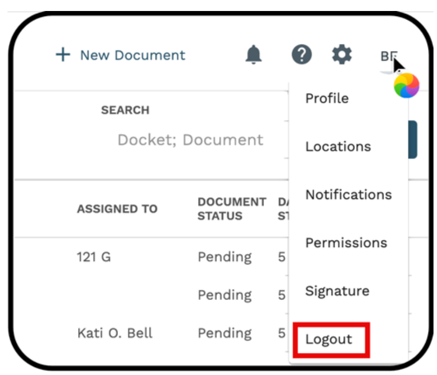
## Initial Login


- Visit [http://gapsc.govlink.us/](http://gapsc.govlink.us/)
- Enter your email address into the **Username** field and click **Next.**
- Click **Forgot Password**
- Enter your email address into the **Username** field and click **Send Reset Link**
- Look for a new email message that includes a link to reset your password.
- Click the link, choose a new password, and log in.

## Log In

- Visit [http://gapsc.govlink.us/](http://gapsc.govlink.us/)
- Enter your email address into the **Username** field and click **Next.**
- Enter your **Password** and click **Login.**
- Upon logging in, you will see your dashboard.

## Log Out




- To Log Out, click your initials in the top-right corner, then select Logout.

## Reset Password

- Visit [http://gapsc.govlink.us/](http://gapsc.govlink.us/)
- Enter your email address into the **Username** field and click **Next.**
- Click **Forgot Password**
- Enter your email address into the **Username** field and click **Send Reset Link**
- Look for a new email message that includes a link to reset your password.
- Click the link, choose a new password, and log in.

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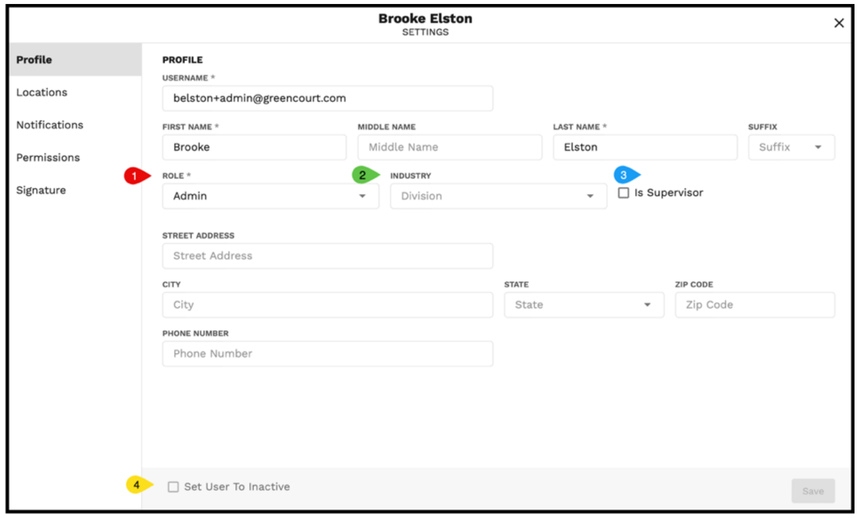
# User Account Settings

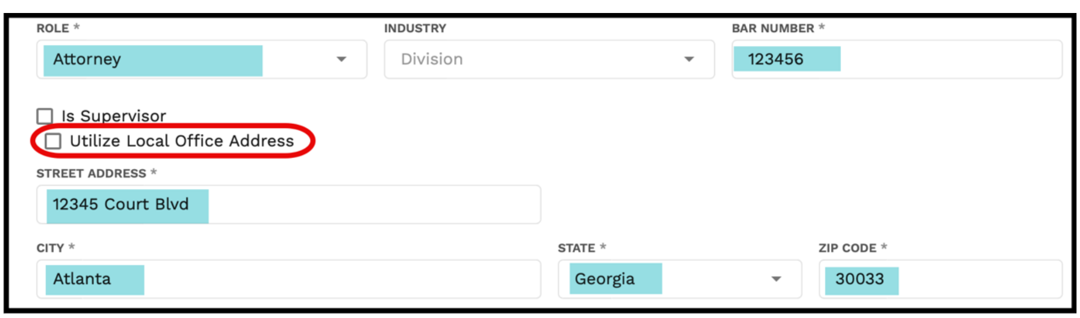
## Profile

The **Profile** tab captures required information –

Username, First Name, Last Name, Role and optional information – Middle Name, Suffix, Industry, Address Information, and Phone Number.




- **Role** - options include Admin, Attorney, Internal and External
- **Industry** – options include Administrative, Agents and Agency Licensing, Electric, Gas, and GUFPA.
- **Is Supervisor** – checking this box indicates the user is a supervisor.
- **Set User to Inactive** - checking this box indicates the corresponding user is not active in GovLink.




Selecting the **Role** of **Attorney** provides additional required fields – **Bar Number** and **Address Information**. There is also an optional field that can be checked to **Utilize Local Office Address**.

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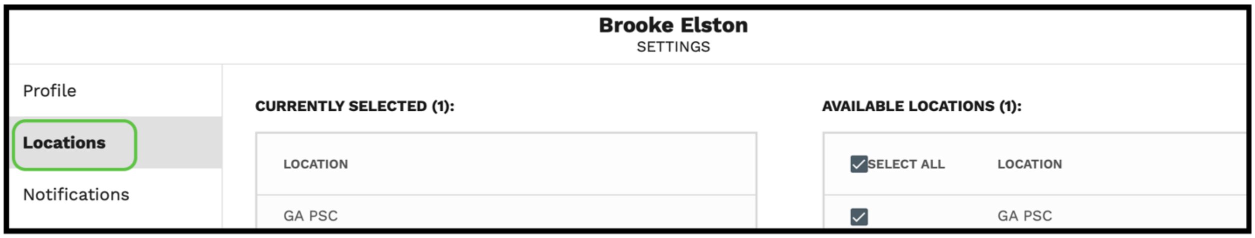
# Locations

**The Locations tab** captures the locations that are associated with the user. Add or remove a location by checking or unchecking the corresponding box.



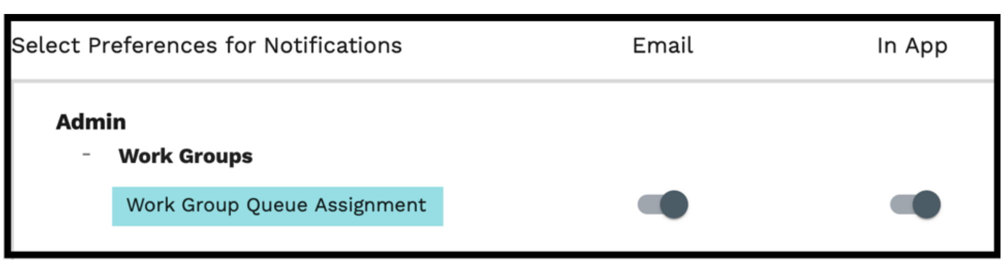

# Notifications

**The Notifications tab** controls the flow of email alerts for events tracked within the system.

- **Email** – Notifications are sent directly to the user's email address.
- **In App** – Notifications can be viewed on the user's dashboard when logged in to GovLink.

## <u>Admin – Work Groups:</u>

- **Work Group Que Assignment** – Will notify a user when a filing has been assigned to a work group, they are a member of.

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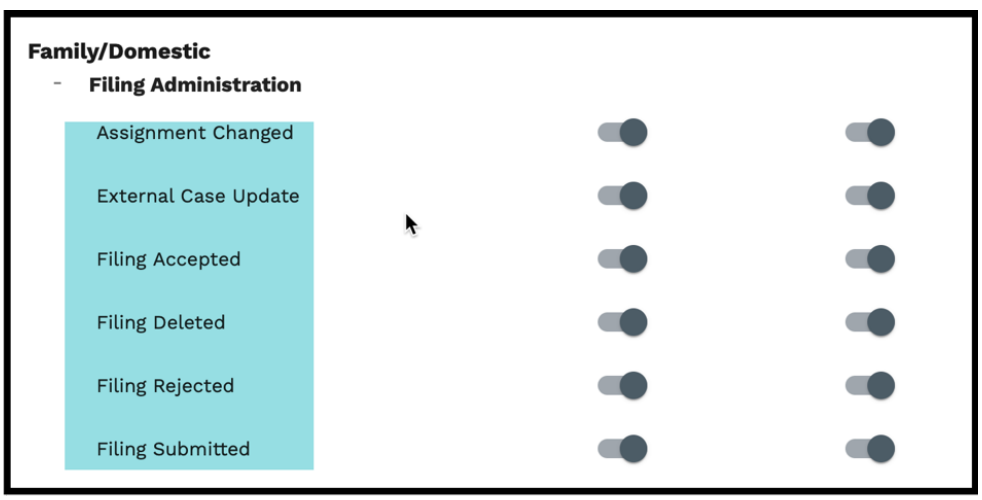
## Family/Domestic – Filing Administration:

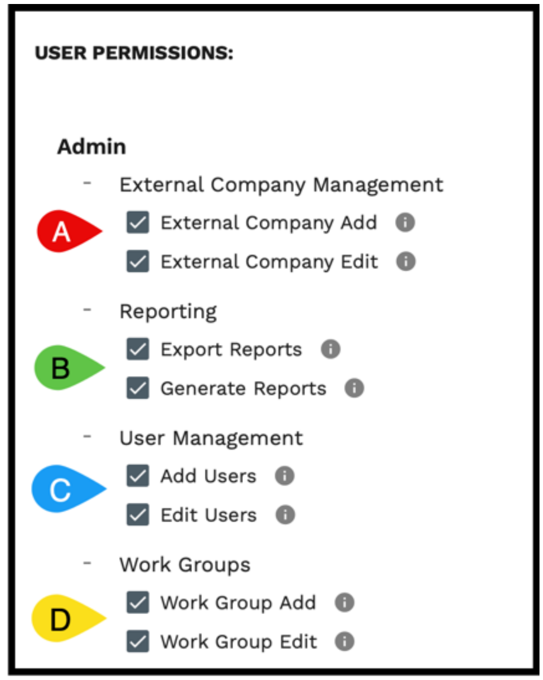
- **Assignment Change** – Once a filing is assigned to a different user, the notification will be sent to the user who created the filing, the assigned user, and anyone following that case.
- **External Case Update** – Occurs when someone external files into the case.
- **Filing Accepted** – Will notify users who created a filing and/or following a case when a filing is manually accepted.
- **Filing Deleted** – Will notify users who are following a case when a filing is deleted.
- **Filing Rejected** – Will notify users who are following a case when a filing is manually rejected.
- **Filing Submitted** – Will notify users who are following a case when a filing is downloaded and filed within GovLink.



# Permissions

## User Permissions: Admin

- **External Company Management** – Allows the user to add/edit external companies.
- **Reporting** – Allows the user to generate/export reports.
- **User Management** – Allows the user to add/edit users.
- **Work Groups** – Allows the user to add/edit work groups.



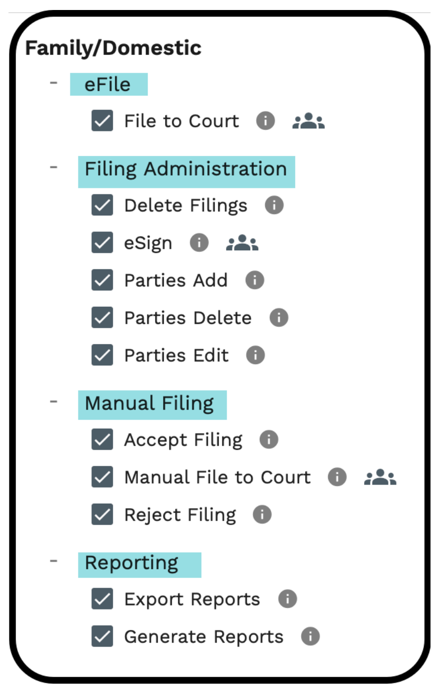

## User Permissions: Family/Domestic

### eFile

- **File to Court** - Allows the user to consent and file documents through their Court using GovLink. This permission is usually reserved for Attorneys.

### Filing Administration

- **Delete Filings** – Allows the user to delete filings created by other users when they are in the status of Unfiled or Rejected
- **eSign** – Allows the user to upload a signature for electronic signing of documents through GovLink. This permission is usually reserved for Attorneys.



- **Parties Add** – Allows the user to create Party/Parties on unfiled Filings.
- **Parties Delete** – Allows the user to delete Party/Parties on unfiled Filings.
- **Parties Edit** – Allows the user to edit Party Details on new, unfiled Filings. Depending on your Organization's setup, edits to Party Details may or may not update your Org's System of Record.

**Manual Filing**

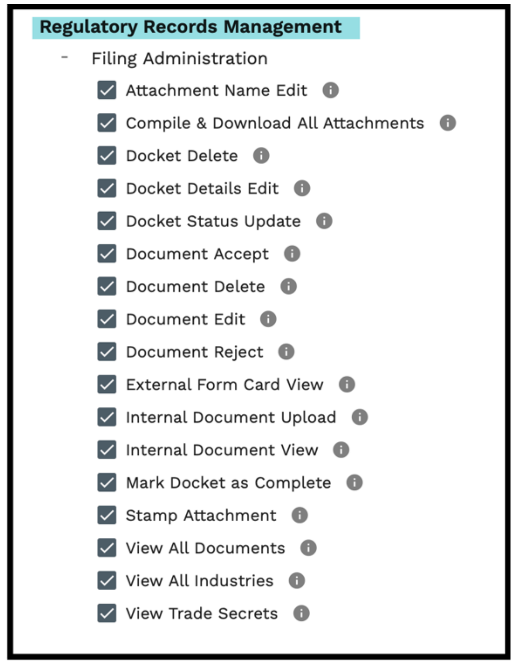
- **Accept Filing** – Allows the user to accept Filings that are manually submitted.
- **Manual File to Court** – Allows the user to consent, download, and manually file documents with their Court.
- **Reject Filing** – Allows the user to reject Filings that are manually submitted.

**Reporting**

- **Export Reports** – Allows the user to export reports.
- **Generate Reports** – Allows the user to generate reports.

## Regulatory Records Management

### Filing Administration




- **Attachment Name Edit** – Allows this user to change the attachment name for an uploaded attachment.
- **Compile and Download All Attachments** – Allows this user to compile and download all attachments on a docket.
- **Docket Delete** – Allows this user to delete a docket.
- **Docket Details Edit** – Allows this user to edit details on a docket such as Industry/Company.
- **Docket Status Update** – Allows the user to change the status of a docket.
- **Document Accept** – Allows the user to accept a document.
- **Document Delete** – Allows the user to delete a document.
- **Document Edit** – Allows the user to edit a document.
- **Document Reject** – Allows the user to reject a document.
- **External Form Card View** – Allows the user permission to view external forms.
- **Internal Document Upload** – Allows the user to upload Internal Documents.
- **Internal Document View** – Allows the user to view Internal Documents.

- **Mark Docket as Complete** – Allows the user to view and click **“Mark as Complete”** button to set docket status to **“Recommendation Complete”.**

- **Stamp Attachment** – Allows the user to stamp attachments.

- **View All Documents** – Allows the user to view all documents including **Pending** and **Rejected**.

- **View All Industries** – Allows the user to view all dockets and documents assigned to all industries.

- **View Trade Secrets** – Allows the user to view trade secret documents in **Document Category** and **Case Details**.

## Signature

The Signature Tab allows the user to upload a signature that can be utilized should they have Permission in settings.


*Note: JPG and PNG files are supported. It’s best to upload a file with a transparent background.*

# System Settings

## User Management

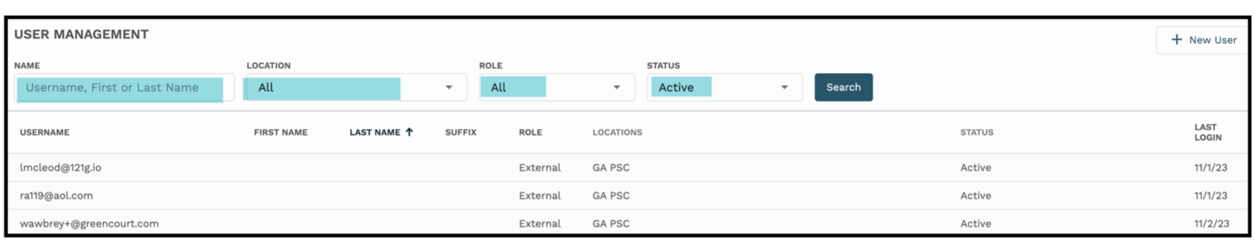
GovLink provides the tools to create new users and manage the settings for existing users:

- **Profile** - Username, Name, Role, Bar Number, Address, and Phone Number
- **Role** - Admin, Attorney, External, and Internal
- **Notifications** - Assignment updates, Filing Status, etc.
- **Permissions** - External Company Managements, Reporting, User Management
- **Signature** - Upload a signature file for users with Signing permission.

## User Management - Layout

For each user who has permissions to add or edit user accounts, a gray gear icon appears to the left of the user's initials.


- Click the gear, then select "**User Management**".
- The User Management page displays a list of all users associated. Find a specific user by utilizing the filters to search by Name, Location, Role, and Status.

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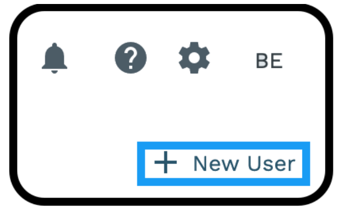
# Create a New User



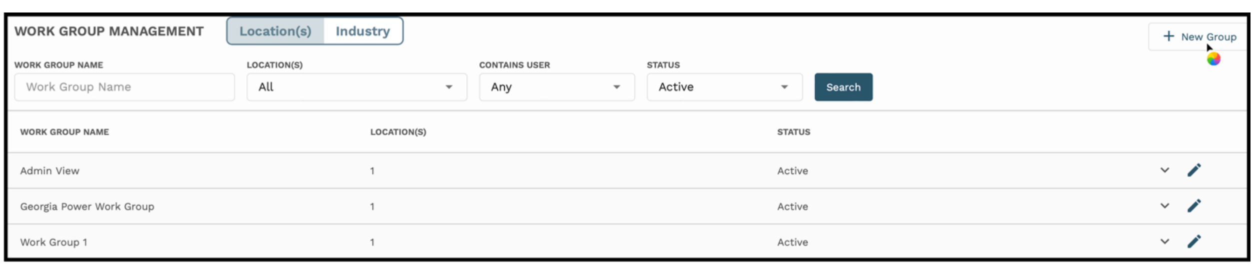

To add a new user that does not appear in GovLink:

- Click **New User**
- Complete the required information on the **Profile** tab.
- The email address must be unique to create the new user.
- Click **Save** to create the new user, this will trigger an email notification to the user.
- Proceed to the Locations, Notifications, and Permissions tabs. *Don't forget to save!*
- To close the window, click the **X** in the top right corner.

# Work Group Management

GovLink provides the tools to create new work groups and manage the profile information for existing work groups:

- **Work Group Information** – Workgroup Name and associated User are required data.

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# External Company Management

GovLink provides the tools to create new external companies and manage the profile information for existing companies:

- **Company Information** – Name, Type, External ID, Address, Phone Number

# External Company Management - Layout

For each user who has permissions to add or edit External Companies, a gray gear icon appears to the left of the user's initials.


- Click the gear, then select "**External Company Management**".
- The **External Company Management** page displays a list of all External Companies. Find a specific company by utilizing the filters to search by Name or Status.

# Documents

## Definitions

- **Attachment** – Attachments are various forms, letters and other paperwork that reside within a Document.
- **Document** – A Document consists of pertinent attachments that reside within a Docket. Documents can be categorized as Public or Trade Secret, dependent on whether the information disclosed is confidential.
- **Docket** – A Docket is essentially a folder that contains the Documents that have been filed to the Court.

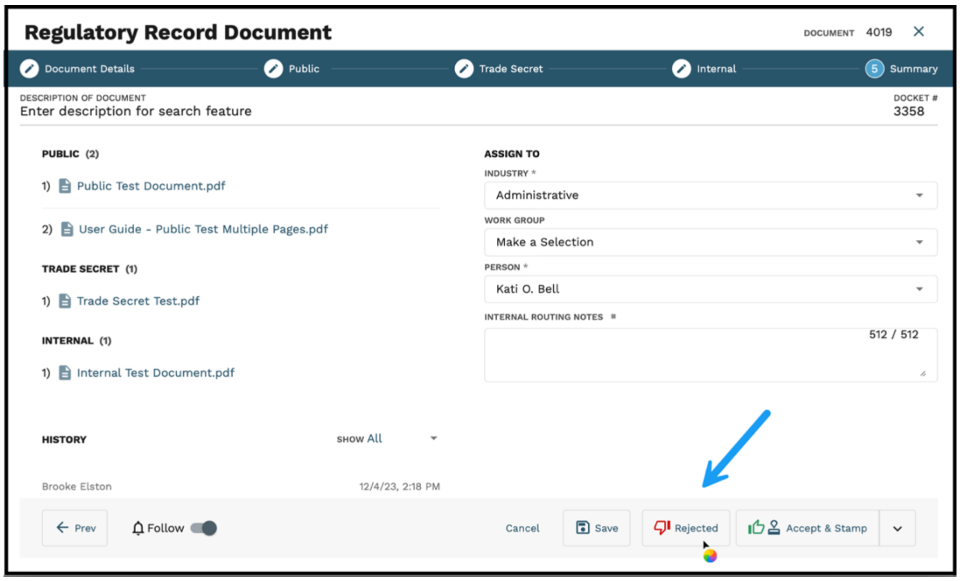
## Dashboard Filters

Once a user logs into GovLink, they will be taken to their Dashboard that contains their workflow. The user has multiple options to filter their Dashboard.

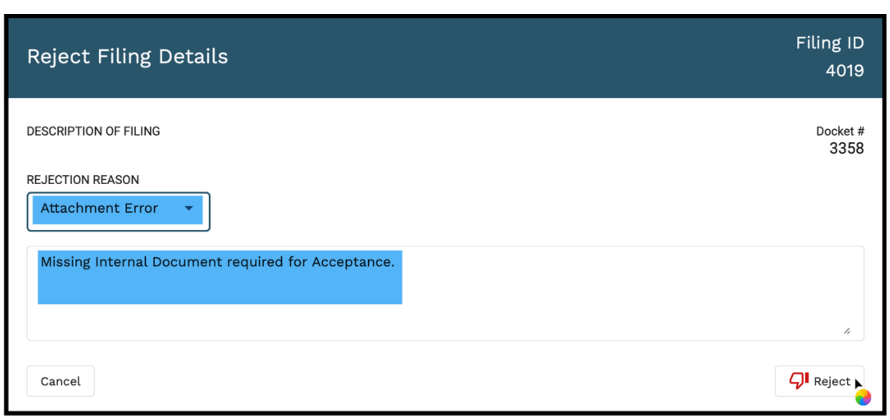

- **Document Status** – Users can select from **Pending**, **Accepted**, **Rejected**, or **All**
- **Industry** – Users can select from **Agents and Agency Licensing**, **Electric**, **Gas**, **GUFPA**, **Insurance Product Regulation**, **Legal**, **Power**, and **Safety Fire.**
- **Work Group** – User can filter by associated work groups.
- **Assigned To** – User can filter filings on their dashboard to see only Documents that have been assigned to a specific user. If you want to see filings that currently do not have a user assigned, select **"Any".**
- **Document Description** – This filter allows the user to search by the Document Description.
- **Search** – User can filter Documents by information such as the Docket or Document number.

# Rejecting a Submitted Document

- From the **User's Dashboard,** select the **Document** that should be rejected.
- Click on **Summary** in the Stepper or navigate using the **Next** button.
- Click **Rejected**




- Select **"Rejection Reason"** from the dropdown box.
  - Selection options are **Attachment Error**, **Incorrect Company Name**, **Incorrect Docket Number** or **Other.**
- Enter any additional information about the **Rejection** in the freeform text field.
- Click **Reject** to route the **Document** back to the submitter.

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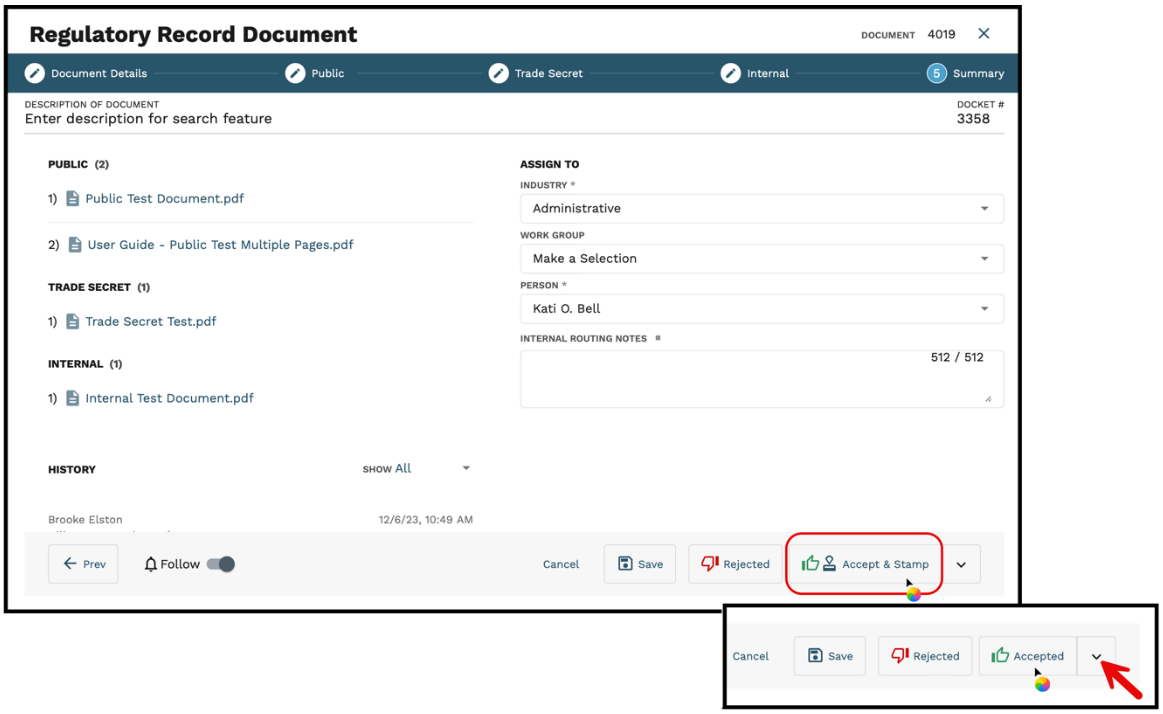
# Accepting a Submitted Document

- From the **User's Dashboard,** select the **Document** that should be accepted.
- Click on **Summary** in the Stepper or navigate using the **Next** button.
- Click **Accept and Stamp** OR Click the down arrow and select **Accepted.**

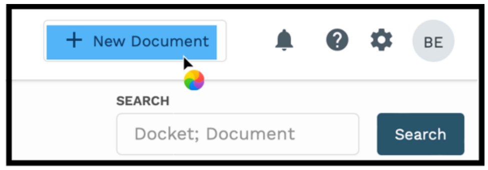



If the user chooses **Accept & Stamp,** they will be taken to **Step Two – Public** in the Document Stepper, where they have the option to choose what attachments they would like to stamp.

*To stamp any additional attachments, the user can utilize the Document Stepper to navigate to the correct attachment. Please note that Administration will need to stamp Document.*

# Create a New Document

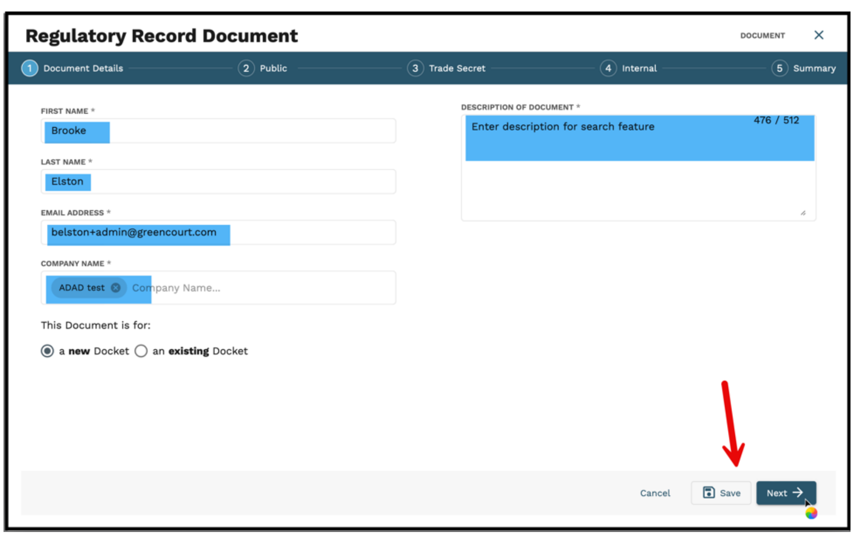
**To create a New Document –**




- Click the **New Document** button next to the user's initials on the top right of the screen.

**<u>Step One - Document Details</u>**

- Enter the **First Name**, **Last Name**, and **Email Address** of the individual creating the Document.
- Enter **Company Name**
    - If the name is already in the system, it will auto populate upon typing.
    - The user can enter more than one Company Name.
- Select whether the Document is for **"a new Docket"** OR **"an existing Docket"**.
    - If **"an existing Docket"** is selected, the user will then be able to type in the existing Docket number.
- Enter **Description of Document** in freeform field.
    - Data entered into this field can be found using the "Description" filter at a later point.
- Click **Next**
    - The user also has the option to click **"Save"** – the Document will be listed on the user's Dashboard under the **"Pending"** filter until further action is taken.

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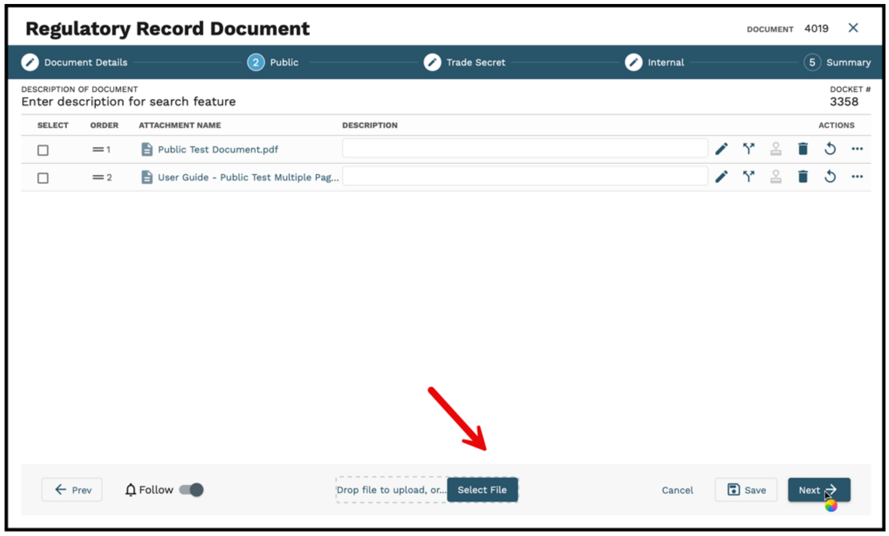
## Step Two - Public

- Click **“Select File”** or Drag and Drop to upload any Public attachments.
- Click **“Next”** to continue.




## Step Three – Trade Secret

- Click **“Select File”** to upload any Trade Secret attachments.
- Click **“Next”** to continue.


## Step Four – Internal

- Click **“Select File”** to upload any Internal document attachments.
- Click **“Next”** to continue.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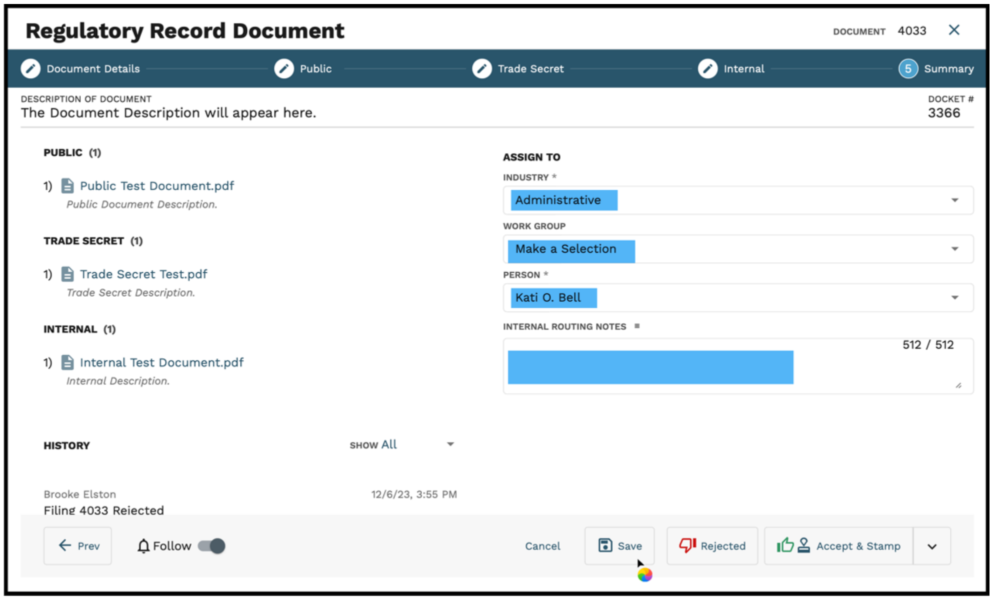
## Step Five – Summary

The **Summary** screen is where the user can access all information input in the **Regulatory Record Document** wizard, as well as the History of the Document.




**To Assign the Document for further review:**

- Select **Industry** dropdown to choose from the following options: **Administrative**, **Agents and Agency Licensing**, **Electric**, **Gas**, **GUFPA**, **Insurance Product Regulation**, **Legal**, **Power and Safety Fire.**

- If utilizing the **Work Group** feature in your workflow, select accordingly. Otherwise, keep the Make a Selection default setting.

- Select **Person** you wish to route the **Document** to from the dropdown.

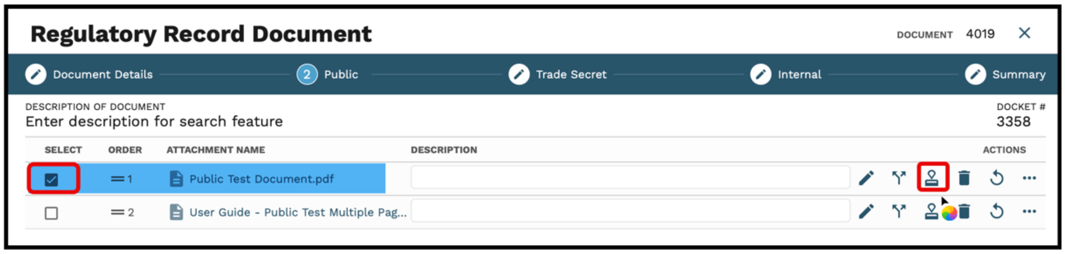
- Enter any **Internal Routing Notes** into the freeform field provided.

- Click **Save**

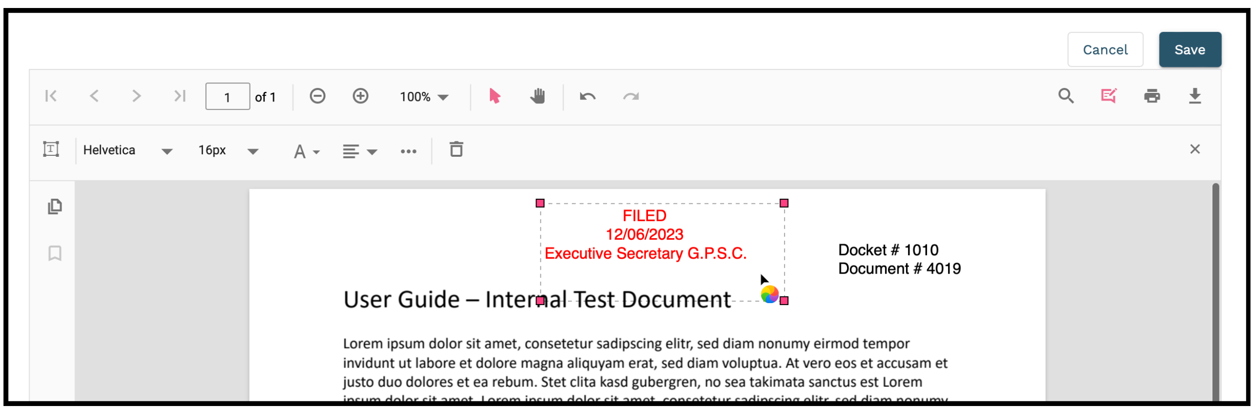
<u>The document will then be routed to the assigned Person for further action and Administration will need to stamp and approve.</u>

# Stamping a Document

- Select the check box next to the **Attachment** name.
- Select the **Stamp** icon.




The Attachment preview window will populate, and the user can move the stamp wherever they would like it to appear.

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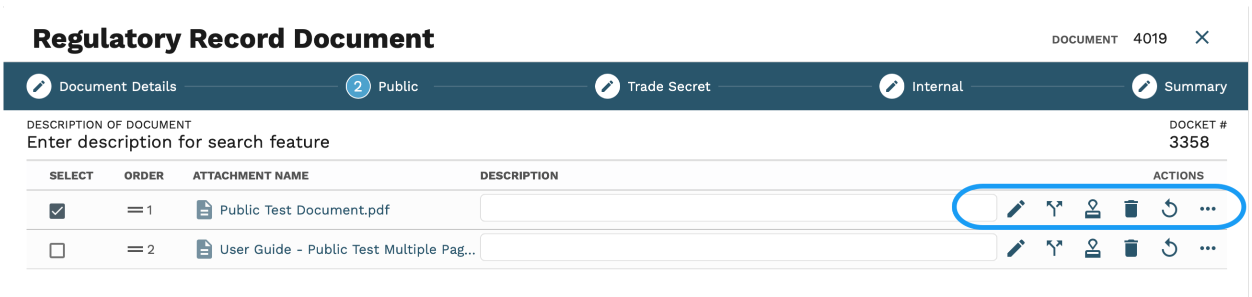
# Document Editing Tools

All Attachments added into the Document can be edited using the tools next to each Attachment.




- **Edit** – Click the Edit icon to make edits on the document.
- **Split** – Click the Split icon to split a multi-page document into separate documents.
- **Combine** - Select the documents and click the combine icon to merge documents.
- **Sign** – Click the Sign icon to insert electronic signatures/initials into the document.
- **Rework** – Click the ReWork icon to remove all signatures to a document and revert the document back to its original format.
- **Delete** – Click the Delete icon to delete an unfiled document.
- **Rotate** – Click the Rotate icon to turn individual pdf documents any direction within GovLink.

**Remember to click <u>Save</u> to save your progress and exit the wizard!**

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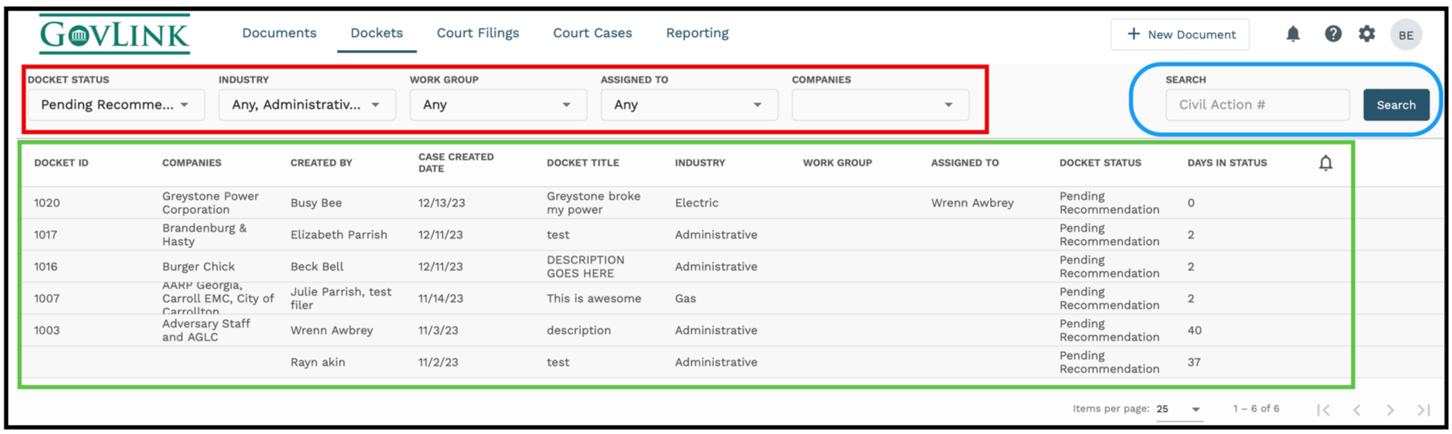
# Dockets

GovLink provides the ability for the user to access current and former Dockets, as well as maintain documents/attachments associated. This is also where the user will go to file a Docket.

## Dashboard/Filters




There are three main sections to the **Dockets** User Dashboard:

**Filters –**

The user can utilize the Filters to narrow down their search criteria.

- Docket Status – Archived, New, Rejected, Pending Recommendation, and Recommendation Complete
- Industry – Administrative, Agents and Agency Licensing, Electric, Gas, Power, Safety Fire or All
- Work Group – Contingent on process flow
- Assigned To – Custom Admin setting – filter by their own Dockets.
- Companies – Frequently used Companies

## Search –

The user can use the search box for specific External ID numbers, Docket numbers, etc.

## Docket List –

The User Dashboard is organized in multiple columns:

- Docket ID
- Companies
- Created By
- Case Created Date
- Docket Title
- Industry
- Work Group
- Assigned To
- Docket Status
- Days in Status
- Bell (Icon

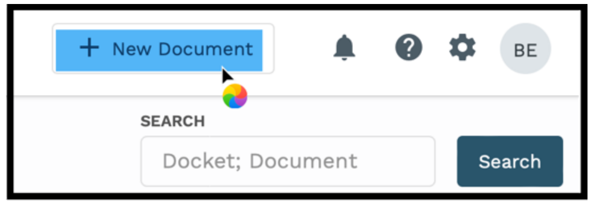
Selecting one of these columns will reorder the Dockets listed.

# Adding to an Existing Docket

To add Documents to an existing Docket –

- Locate the Docket number you want to add to.

- Click the **New Document** button next to the user's initials on the top right of the screen.




**<u>Step One - Document Details</u>**

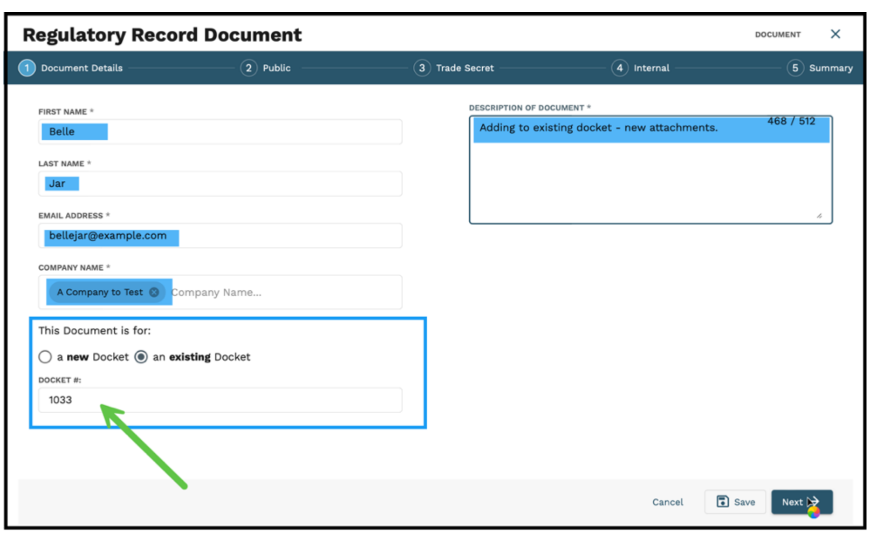
- Enter the **First Name**, **Last Name**, and **Email Address** of the individual creating the Document.

- Enter **Company Name**
    - If the name is already in the system, it will auto populate upon typing.
    - The user can enter more than one Company Name.

- Select **"Existing Docket"** and type in the existing Docket number.

- Enter **Description of Document** in freeform field.
    - Data entered into this field can be found using the "Description" filter at a later point.

- Click **Next**
    - The user also has the option to click **"Save"** – the Document will be listed on the user's Dashboard under the **"Pending"** filter until further action is taken.

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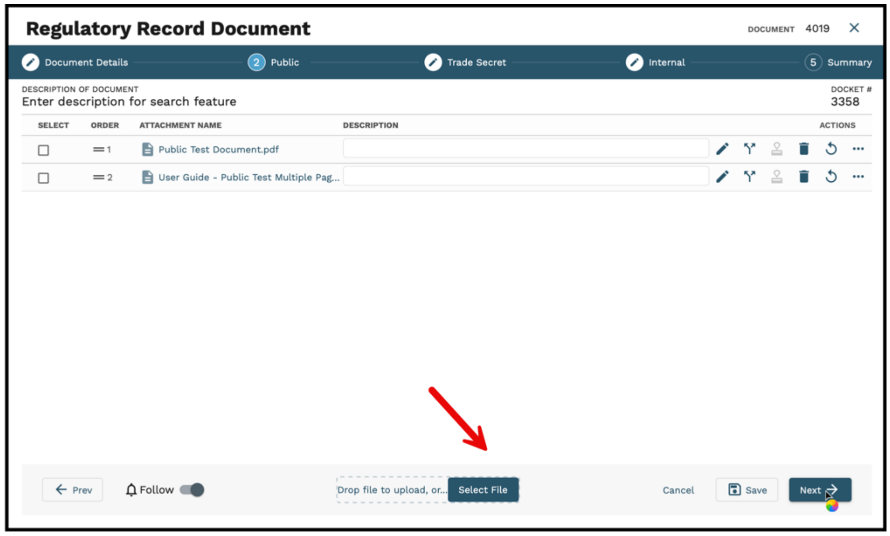
## Step Two - Public

- Click **“Select File”** or Drag and Drop to upload any Public attachments.
- Click **“Next”** to continue.




## Step Three – Trade Secret

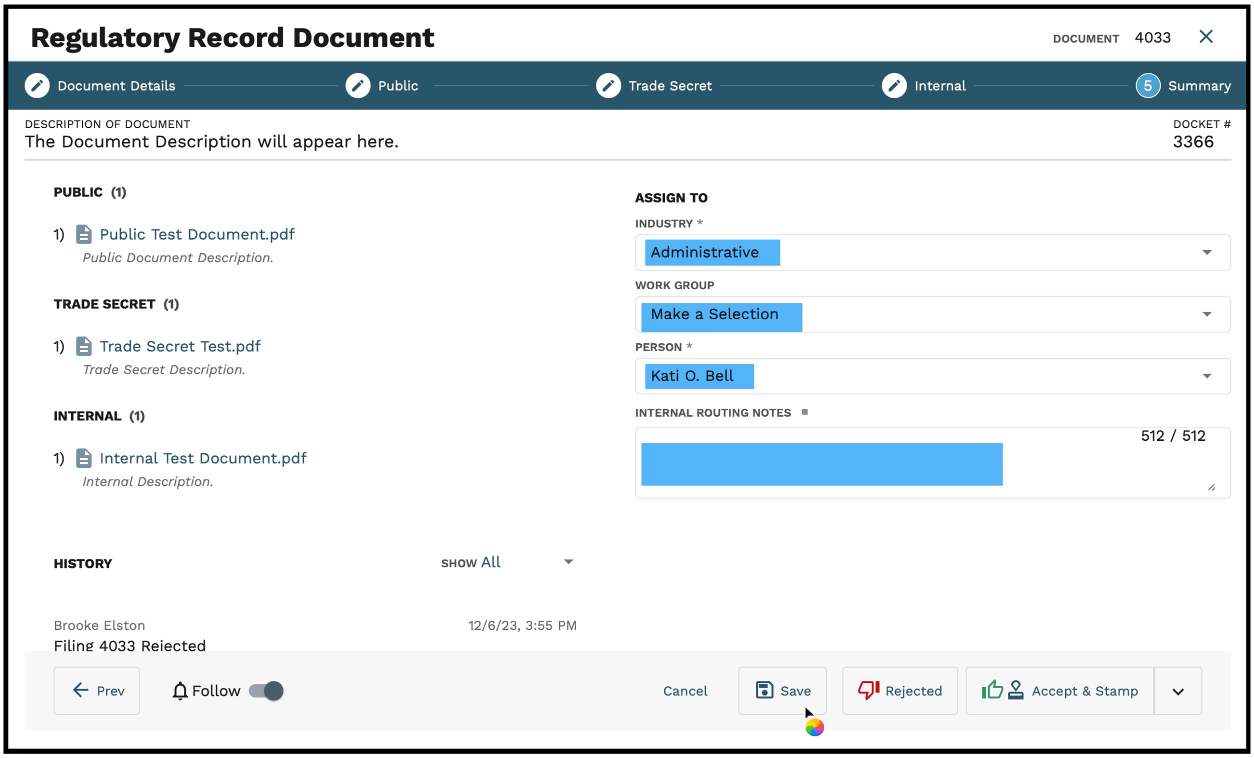
- Click **“Select File”** to upload any Trade Secret attachments.
- Click **“Next”** to continue.


## Step Four – Internal

- Click **“Select File”** to upload any Internal document attachments.
- Click **“Next”** to continue.

## Step Five – Summary

The **Summary** screen is where the user can access all information input in the **Regulatory Record Document** wizard, as well as the History of the Document.




**To Assign the Document for further review:**

- Select **Industry** dropdown to choose from the following options: **Administrative**, **Agents and Agency Licensing**, **Electric**, **Gas**, **GUFPA**, **Insurance Product Regulation**, **Legal**, **Power and Safety Fire.**
- If utilizing the **Work Group** feature in your workflow, select accordingly. Otherwise, keep the Make a Selection default setting.
- Select **Person** you wish to route the **Document** to from the dropdown.
- Enter any **Internal Routing Notes** into the freeform field provided.
- Click **Save**

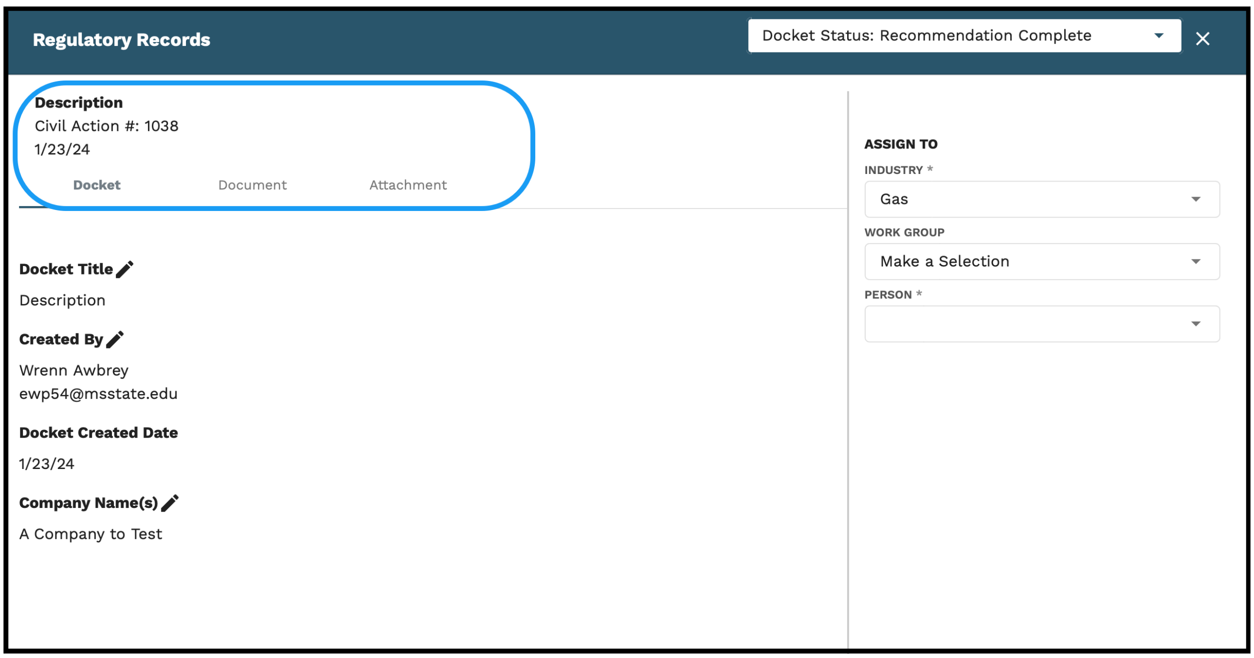
<u>The document will then be routed to the assigned Person for further action & Administration will need to stamp/approve.</u>

# Filing to Court

**To file to the court –**

- Locate the Docket containing the Documents that should be filed.

- Once the Docket is selected the Regulatory Records window will populate, providing the user the opportunity to review all associated details.




- Select **File to Court**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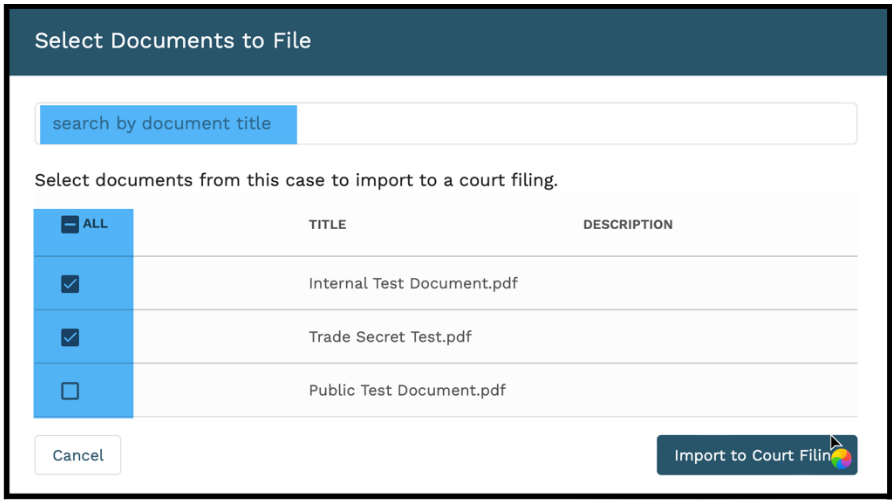
- Select the **Documents** to import to the court filing.
    - The user has the option to search by the title of the Document, select all Documents, or select each Document individually.

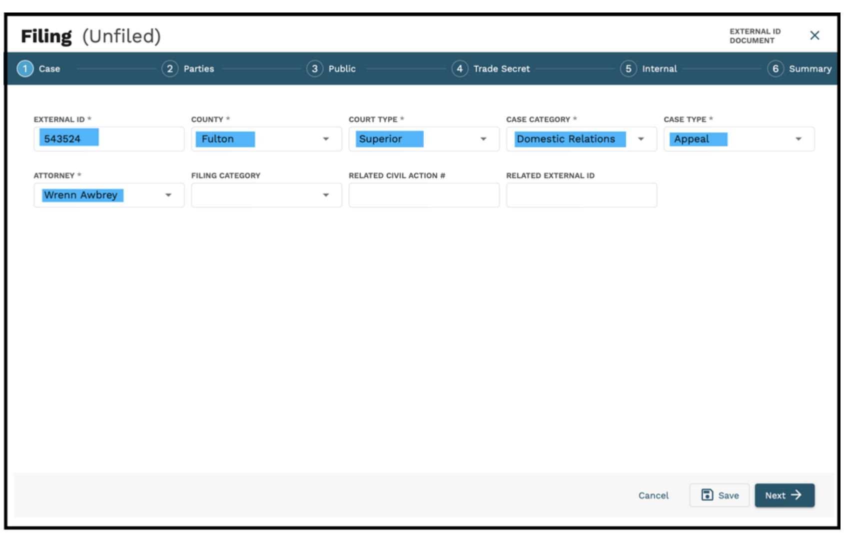
- Click **Import to Court Filing**




**<u>Step One - Case</u>**

- Enter the **Case Details**
    - **Required fields** – External ID, County, Court Type, Case Category, Case Type and Attorney.
    - Optional fields – Filing Category, Related Civil Action #, and Related External ID

- Select **Next**

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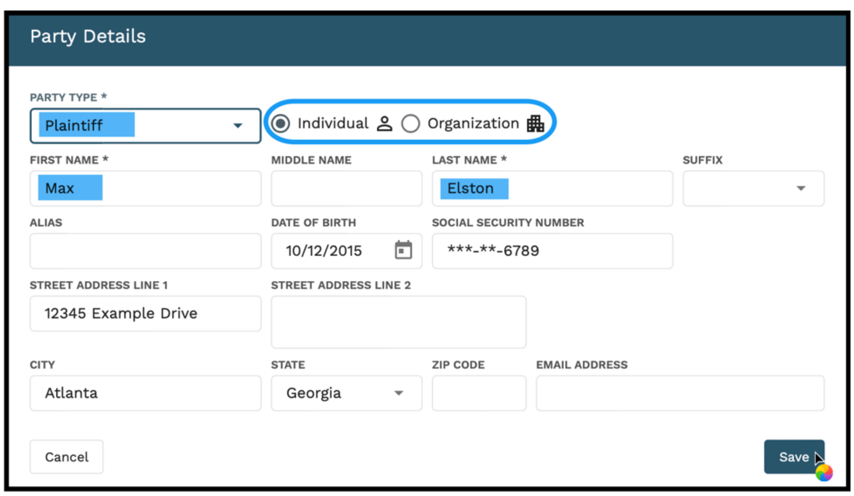
## <u>Step Two – Parties</u>

To Add Parties to the filing –

- Select **Add**
- Select **Party Type** (Plaintiff/Defendant]
- Select **Individual** or **Organization**
- Enter **Party Details**
    - Required fields for Individual:
        - Party Type
        - First Name
        - Last Name
    - Optional fields for Individual:
        - Middle Name
        - Suffix
        - Alias
        - Date of Birth
        - Social Security Number
        - Street Address, City, State and Zip Code
        - Email Address
    - Required fields for Organization:
    - Optional fields for Organization:
- Select **Save**

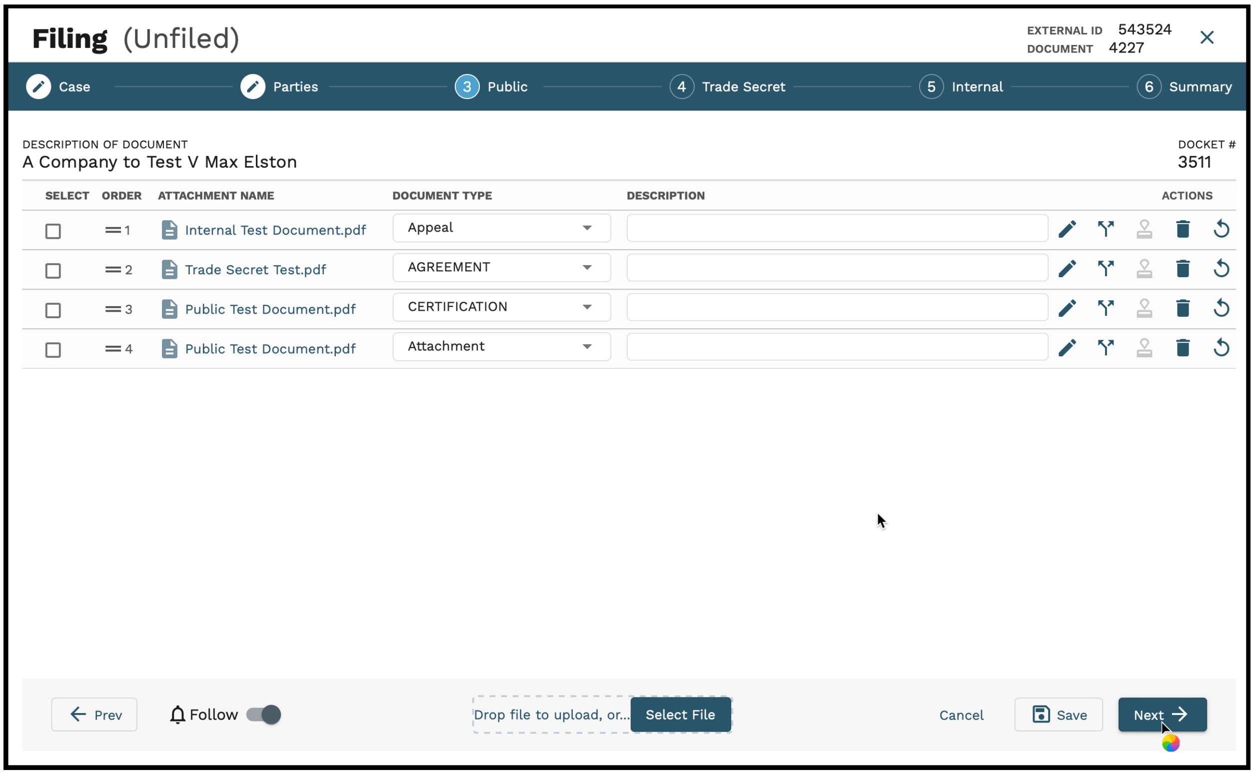



*To add any additional parties, Select **Add** and repeat the steps listed above.*

- Select **Next** to continue to **Step Three – Public**

## Step Three – Public

- Click **“Select File”** or Drag and Drop to upload any Public attachments.
- Click **“Next”** to continue.

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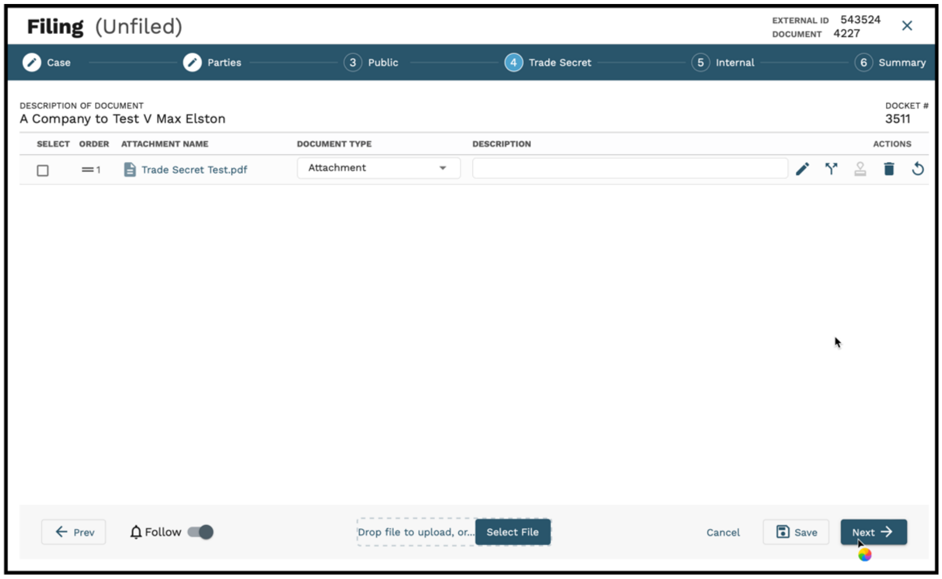
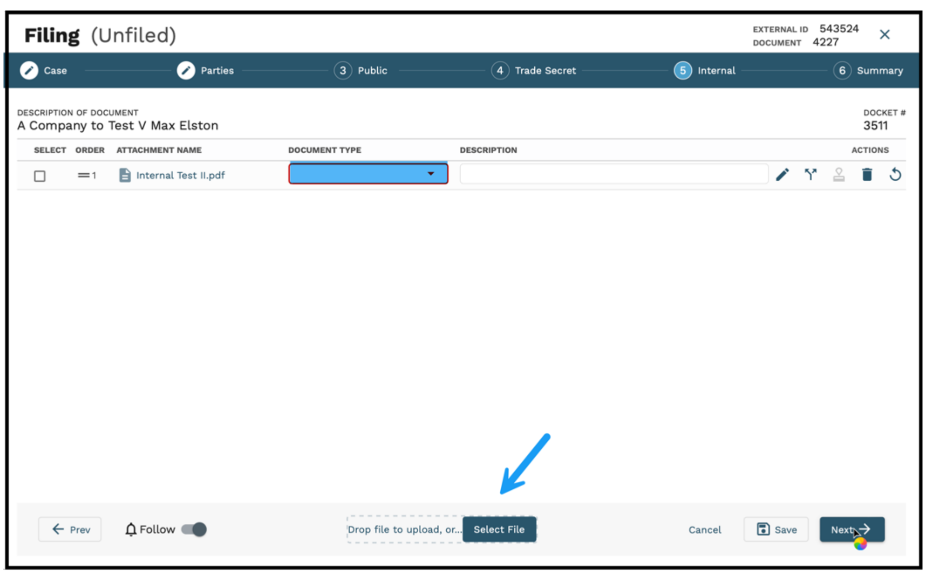
## Step Four – Trade Secret

- Click **“Select File”** or Drag and Drop to upload any Trade Secret attachments.
- Click **“Next”** to continue.




## Step Five – Internal

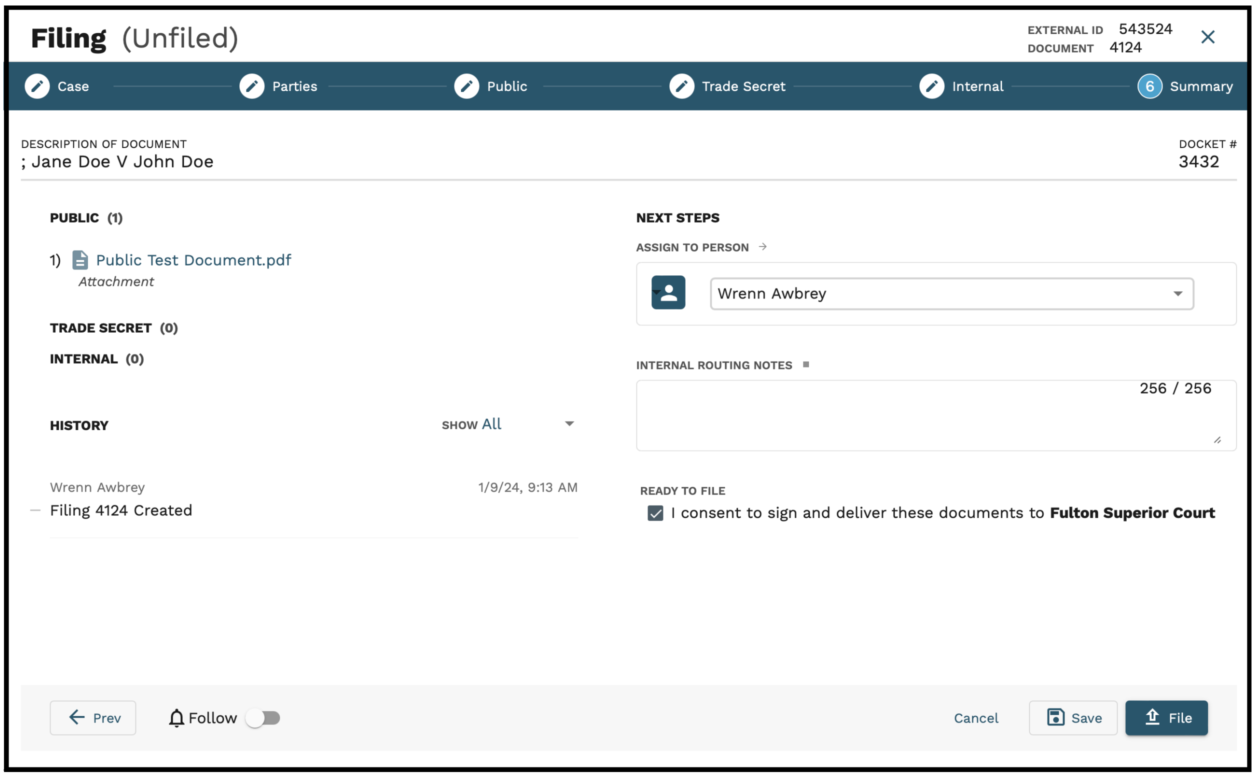
- Click **“Select File”** or Drag and Drop to upload any Trade Secret attachments.
- Click **“Next”** to continue.



## Step Six – Summary

After reviewing all the Filing information on the Summary screen, complete the “Next Steps”.

- Select the dropdown under **“Assign to Person”** and choose accordingly.
- Select the checkbox to consent to signing/filing the documents to the courts.
- Click **File**

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# Court Cases

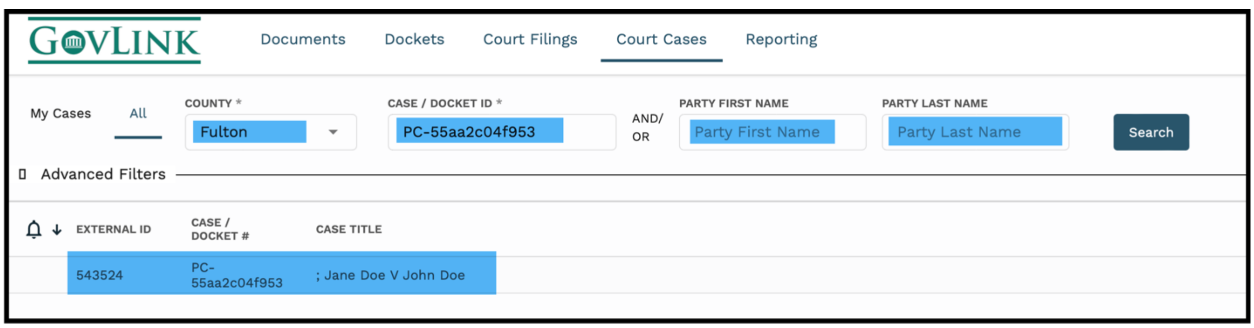
## Finding an Existing Case

**To find an Existing Case in GovLink –**

- Select **Court Cases** from the top of the screen.


The user must select to search within the following:

- **My Cases** – All cases in a specific county
- **All** – Will search all cases at that specific county, then:
    - the Case/Docket ID or part/all of a Party's First and Last names.




**Once the required fields have been filled, the Search button will become clickable.**

The user can also use the advanced filters and search by:

- External ID
- Party Type
- Party Entity
- Court Type
- Case Category
- Case Type

*Clicking on any Heading will sort the filters.*

need help?

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# Court Filings

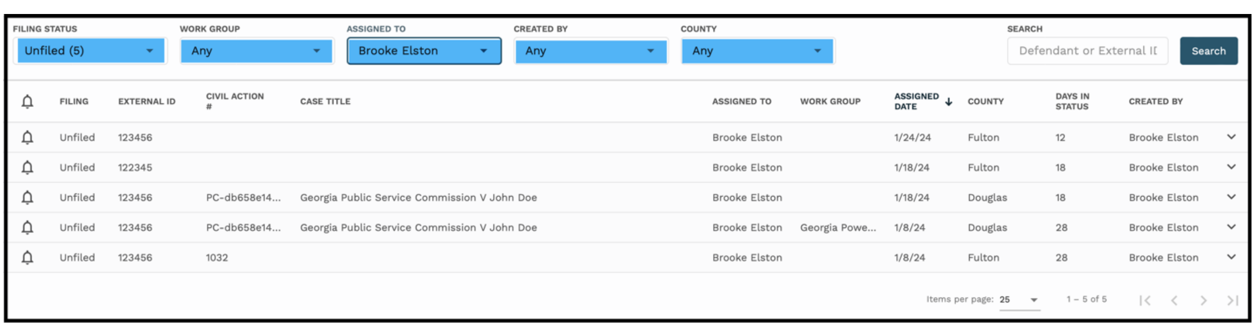
**To find a Court Filing in GovLink –**

- Select **Court Filings** from the top of the screen.


**<u>Filter Options –</u>**

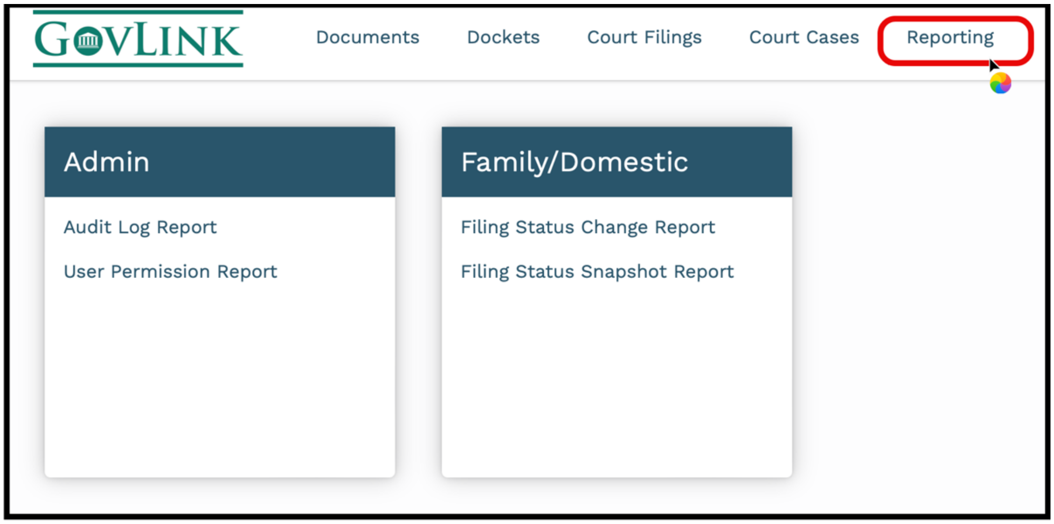
The user can use the filters to narrow down and locate specific Court Filings.

- **Filing Status** – Users can select from Filed, Unfiled, Accepted, Rejected or All.
- **Work Group** – Users can filter by associated work groups.
- **Assigned To** - Users can filter filings on their dashboard to see only Court Filings that have been assigned to a specific user. If you want to see filings that currently do not have a user assigned, select **"Any".**
- **Created By** – Users can filter by the creator of the Court Filing.
- **County** – Users can filter by the associated county.
- **Search** - User can filter Court Filings by information such as the Defendant or External ID.




| FILING | EXTERNAL ID | CIVIL ACTION # | CASE TITLE | ASSIGNED TO | WORK GROUP | ASSIGNED DATE | COUNTY | DAYS IN STATUS | CREATED BY |
|---|---|---|---|---|---|---|---|---|---|
| Unfiled | 123456 | | | Brooke Elston | | 1/24/24 | Fulton | 12 | Brooke Elston |
| Unfiled | 122345 | | | Brooke Elston | | 1/18/24 | Fulton | 18 | Brooke Elston |
| Unfiled | 123456 | PC-db658e14... | Georgia Public Service Commission V John Doe | Brooke Elston | | 1/18/24 | Douglas | 18 | Brooke Elston |
| Unfiled | 123456 | PC-db658e14... | Georgia Public Service Commission V John Doe | Brooke Elston | Georgia Powe... | 1/8/24 | Douglas | 28 | Brooke Elston |
| Unfiled | 123456 | 1032 | | Brooke Elston | | 1/8/24 | Fulton | 28 | Brooke Elston |

# Reports




## Admin

- **Audit Log Report** shows a user what actions have been taken on a filing based on location. This report can be filtered down by workgroup, user, action preformed, or case details.

- **User Permission Report** shows what users have what permission for a specified location.

## Family/Domestic

- **Filing Status Change Report** can show what filings are in a particular status in a selected time frame of a specified location.

- **Filing Status Snapshot Report** shows the number of filings that are in each status during a selected date and location.