



Office of the  
Chief Information  
Officer (OCIO)

# Trade Agreements Secretariat (TAS) Electronic Filing System (E-filing) End User Guide

October 2023

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## SECRETARIAT CONTACT INFORMATION

### **CUSMA Secretariat, Canadian Section**

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E-mail: [canada@can-mex-usa-sec.org](mailto:canada@can-mex-usa-sec.org)

### **TMEC Secretariat, Mexican Section**

Phone.: +52 55 57 29 91 00 Ext. 15011

E-mail: [ssmtlc@economia.gob.mx](mailto:ssmtlc@economia.gob.mx)

### **USMCA Secretariat, U.S. Section**

Phone: 202-482-5438

E-mail: [usa@can-mex-usa-sec.org](mailto:usa@can-mex-usa-sec.org)

Filings should be submitted to the U.S. or Canadian Sections **no later than 4:00 PM** ET on the day the filing is due. Filings should be submitted to the Mexican Section **no later than 4:00 PM** CST on the day the filing is due.

The normal business hours for the U.S. and Canadian Sections are 9:00 am to 5:00 pm Eastern Time (ET). The normal business hours for the Mexican Section are 9:00 am to 5:00 pm Central Standard Time (CST). Filings submitted outside of normal business hours will be reviewed and processed the next business day.

## Introduction

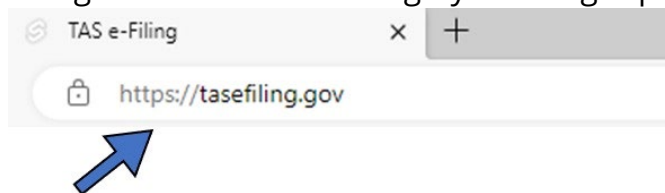
This end user guide provides detailed steps for navigating and using the TAS E-filing System. The guide instructs the user how to create an account, log into the system, request access to upload filings, upload a filing to the system, view and download filings, and submit and track administrative protective order applications.

## Creating an Account

To access the TAS E-filing System, the user must create an account.

### Signing Up

1. Navigate to the TAS E-filing System login page at <https://www.tasefiling.gov>.




2. Select the **Sign up Now** link below the blue Sign in button.

A screenshot of the TAS E-filing System sign-in page. At the top is the Department of Commerce International Trade Administration logo. Below the logo is the heading 'Sign in' and the instruction 'Sign in with your email address'. There are two input fields: 'Email Address' and 'Password'. Below the password field is a link that says 'Forgot your password?'. At the bottom left is a blue 'Sign in' button. To the right of the button is a link that says 'Don't have an account? Sign up now'. A blue arrow points from the 'Sign up now' link to the screenshot below.

3. Enter your email address, click **Send Verification Code**.

< Cancel



## User Details

Email Address \*

Send verification code

New Password \*

Confirm New Password \*

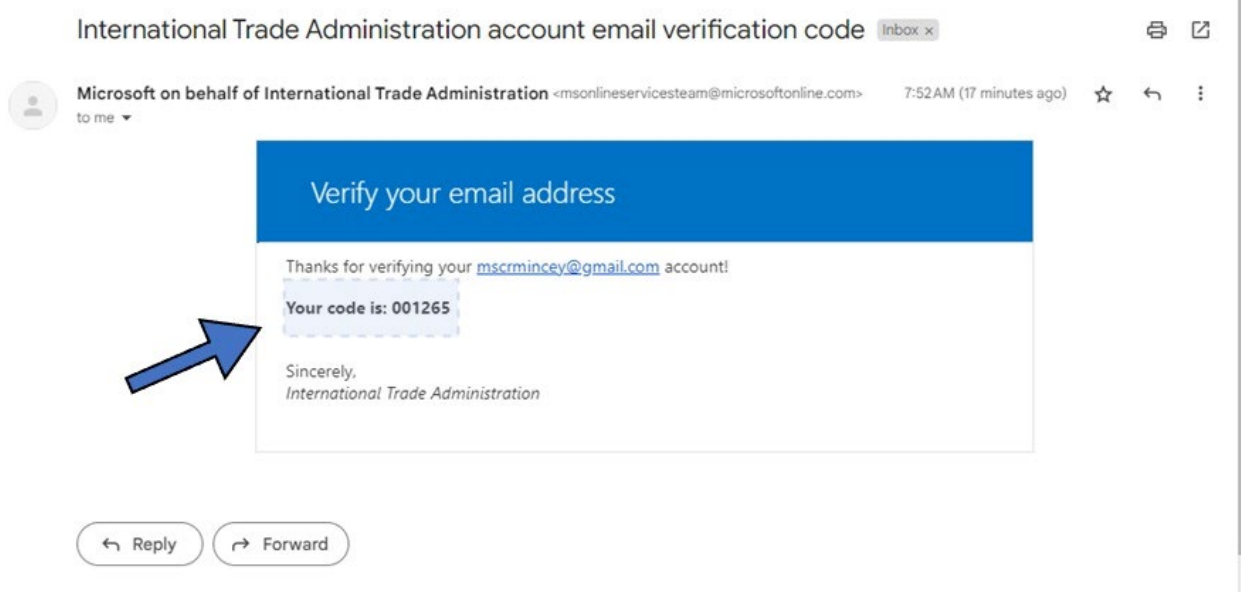
First Name

Last Name

Create

You will receive an email from **Microsoft on behalf of the International Trade Administration** that will contain the verification code.


4. Copy this code and return it to the TAS E-filing System site.



5. Enter the code in the space indicated, and then click the **Verify Code** button.

## User Details

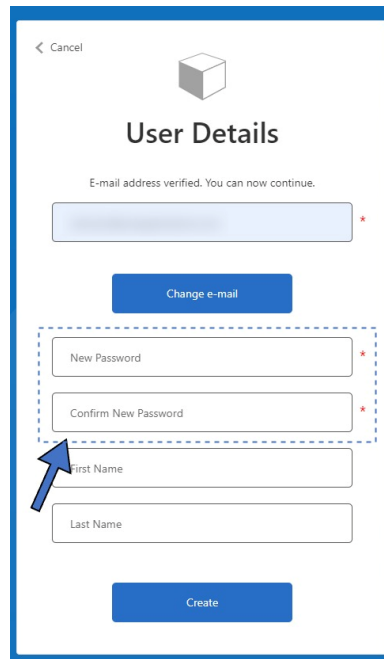
Verification code has been sent to your inbox. Please copy it to the input box below.



7. Enter a **new password** and enter the same password into **Confirm New Password** to confirm.
8. Enter your **First Name** and **Last Name**.
9. Click **Create**.

**NOTE:** The password must be between 8 and 64 characters. The password must have at least 3 of the following:

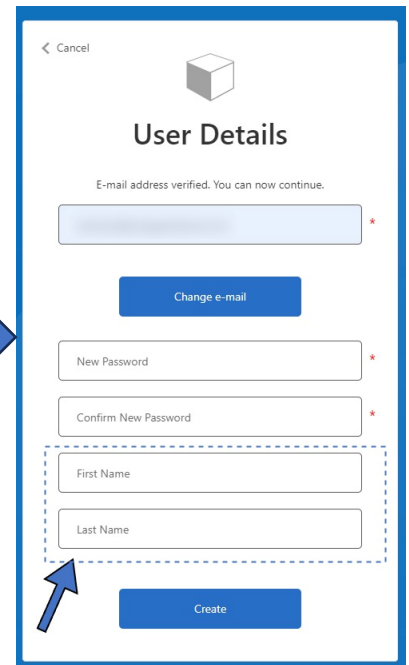
- a lowercase letter
- an uppercase letter
- a digit
- a symbol



< Cancel

### User Details

E-mail address verified. You can now continue.




< Cancel

### User Details

E-mail address verified. You can now continue.

## User Agreement

You are accessing a U.S. Government information system, which includes: 1) this computer, 2) this computer network, 3) all computers connected to this network, and 4) all devices and storage media attached to this network or to a computer on this network. You understand and consent to the following: you may access this information system for authorized use only; unauthorized use of the system is prohibited and subject to criminal and civil penalties; you have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system at any time and for any lawful Government purpose; the Government may monitor, intercept, audit, and search and seize any communication or data transiting or stored on this information system; and any communications or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose. This information system may contain Controlled Unclassified Information (CUI) that is subject to safeguarding or dissemination controls in accordance with law, regulation, or Government-wide policy. Creating an account and logging into this system constitutes acknowledgement of this warning.



INTERNATIONAL  
**TRADE**  
ADMINISTRATION

**Sign in**  
Sign in with your email address

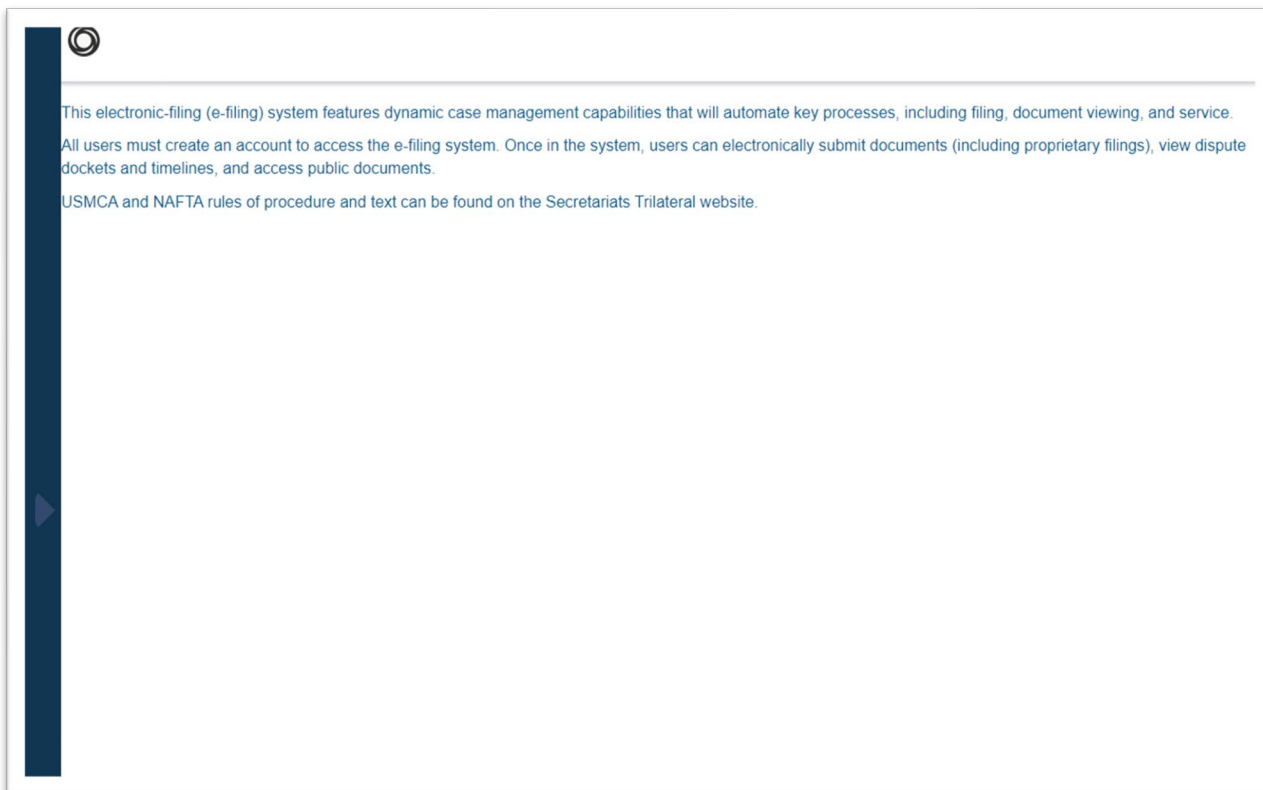
Email Address

You will see the User Agreement when initially logging in. Proceeding to sign into the TAS E-filing System means you are aware of and agree to the terms.

## Logging In Home Dashboard

Once the verification code has been verified, the Homepage displays for the user. As a new user, your permissions are defaulted to a public user role.

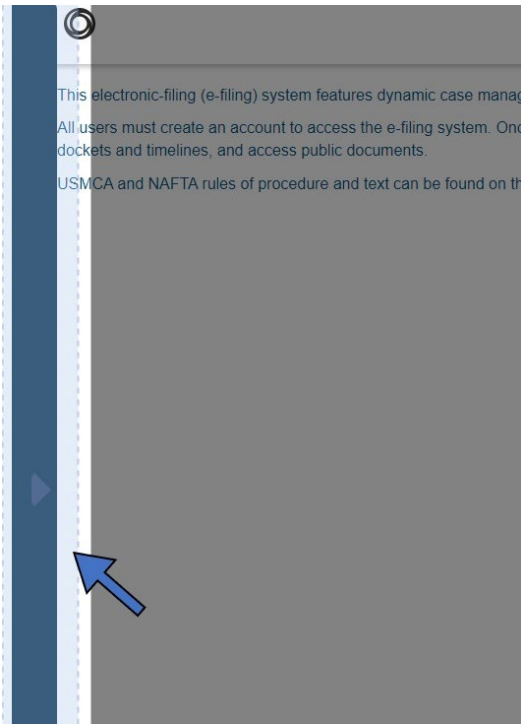





## Profile Page

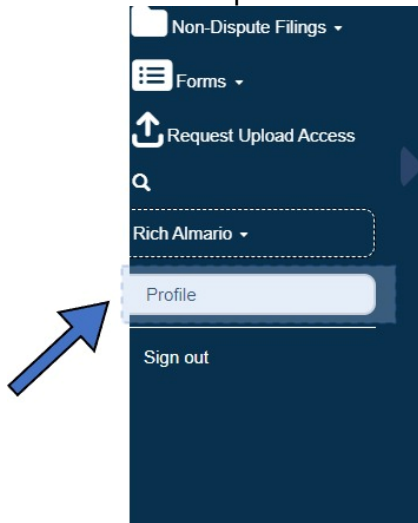
A user can update their profile information on their Profile page.

1. The user can navigate to the Profile page by clicking on the left navigation panel.





2.

3. Click the  dropdown arrow next the username to show the **Profile** button.




4. Proceed to the Profile page by clicking the **Profile** link. The page will then display **Your Information**.



Home > Profile

## Profile



Rich Almario

Profile

Security

Change Two-Factor authentication

Please provide some information about yourself.

The **First Name** and **Last Name** you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.

The **Email Address** and **Phone** number will not be displayed on the site.

Your **Organization** and **Title** are optional. They will be displayed with your comments and forum posts.

### Your Information

<b>First Name *</b>	<b>Last Name *</b>
<input type="text" value="Rich"/>	<input type="text" value="Almario"/>
<b>E-mail *</b>	<b>Title</b>
<input type="text" value="richard.almario@trade.gov"/>	<input type="text"/>
<b>Business Phone</b>	<b>Preferred Language</b>
<input type="text" value="Provide a telephone number"/>	<input type="text" value="English"/> <input type="button" value="x"/> <input type="button" value="Q"/>
<b>Country</b>	<b>Organization</b>
<input type="text"/>	<input type="text" value="ITA"/> <input type="button" value="x"/> <input type="button" value="Q"/>

### How may we contact you? Select all that apply

- ☒ Email
- ☒ Fax
- ☒ Phone
- ☒ Mail


Update

5. Complete the fields:

- **First Name:** Enter your first name.
- **Last Name:** Enter your last name.
- **E-mail:** This contains the e-mail address defined in the sign up.
- **Title:** Enter your title.
- **Business Phone:** Enter your business phone number.
- **Website:** Enter your website URL.
- **Organization:** Click the magnifying glass to lookup your organization and select the radio button of that organization to populate the field (*Note: Please see "Adding a new Organization" below if your organization is not already on the list*).
- **Country:** Select your country from the drop-down menu
- **Preferred Language:** Click the magnifying glass to lookup language options and select your preferred language.

### Adding a new Organization

A new organization can be created if the existing list does not contain your organization

1. Click on the  magnifying glass symbol next to the Organization field to open the organization modal screen.

- Click on the **New** button on the bottom left of the screen to open a new organization form modal.

Lookup records ✕


Search Q

Choose one record and click Select to continue

✓ Organization Name	Created On
<input type="radio"/> Inside U.S. Trade	9/7/2023 11:50 PM
<input type="radio"/> Mx-Porta	9/7/2023 11:50 PM
<input type="radio"/> Pine Ideas Ltd.	9/7/2023 11:50 PM
<input type="radio"/> Norton Rose Fulbright	9/7/2023 11:50 PM
<input type="radio"/> Millar Western Forest Products Ltd.	9/7/2023 11:50 PM
<input type="radio"/> Mid Valley Lumber Specialties Ltd.	9/7/2023 11:50 PM
<input type="radio"/> UC Davis	9/7/2023 11:50 PM

< 1 2 3 4 5 6 7 8 .. 40 >

New Select Cancel Remove value



3. This form contains the fields below. The **Organization Name** is required to complete the new record.
- a. Organization Name
  - b. Street Address
  - c. City
  - d. Country
  - e. State/Province
  - f. Zip Code

The screenshot shows a web form titled "Create a new record" with a close button (x) in the top right corner. The form contains the following fields:

- Organization Name \***: A text input field with a red asterisk indicating it is required.
- Street Address**: A text input field.
- City**: A text input field.
- Country**: A dropdown menu with a downward arrow icon.
- State/Province**: A text input field.
- Zip Code**: A text input field.

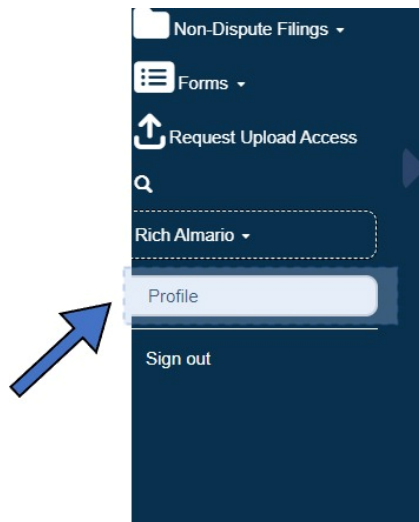
At the bottom of the form is a dark blue button labeled "Submit".

4. Press the **Submit** Button to create the new Organization. This action fills the Organization field for the User's profile.

6. Click the  **Update** button.

## Changing Preferred Language

1. Click Profile on the left-navigation menu to change the language that appears on the site for use.



2. Scroll down to **Preferred Language**.
3. Click on the magnifying glass to select the preferred language:
  - English
  - Spanish
  - French

### Preferred Language



## My Involved Disputes Dashboard

The My Involved Disputes page displays the user's active disputes summary list.

- Dispute Name: a shortened dispute number that can be clicked to open the dispute.
- Dispute number: the unique Secretariat file number for the dispute
- Agreement type: currently all agreement types are USMCA
- Dispute Type: Article 10.12 or Chapter 31, 31 A, or 31 B



My Involved Disputes

<div><div>Search</div><div>Q</div></div>			
Dispute Name	Dispute Number	Agreement Type	Dispute Type
Candace Thursday	CDA-USA-2023-10.12-09	USMCA	Article 10.12
Candace Friday	CDA-MEX-2023-10.12-04	USMCA	Article 10.12
DEMO	CDA-USA-2023-10.12-13	USMCA	Article 10.12
Candace Final Test	USA-CDA-2023-10.12-15	USMCA	Article 10.12
SL AD 88	USA-CDA-2023-31-09	USMCA	Chapter 31
PENDING DISPUTE	CDA-MEX-2023-10.12-02	USMCA	Article 10.12
Widgets from Canada	U.S.-CDA-2023-10.12-14	USMCA	Article 10.12
Energy Safeguard Measure	U.S.-MEX-2023-31-03	USMCA	Chapter 31
chicken tendies	USA-CDA-2023-31-08	USMCA	Chapter 31

## Using the Public Reading Room

All users have access to public documents in the TAS E-filing System. These documents can be found in the Public Reading Room.

1. Select the **Public Reading Room** option from the Leftmost navigation menu.



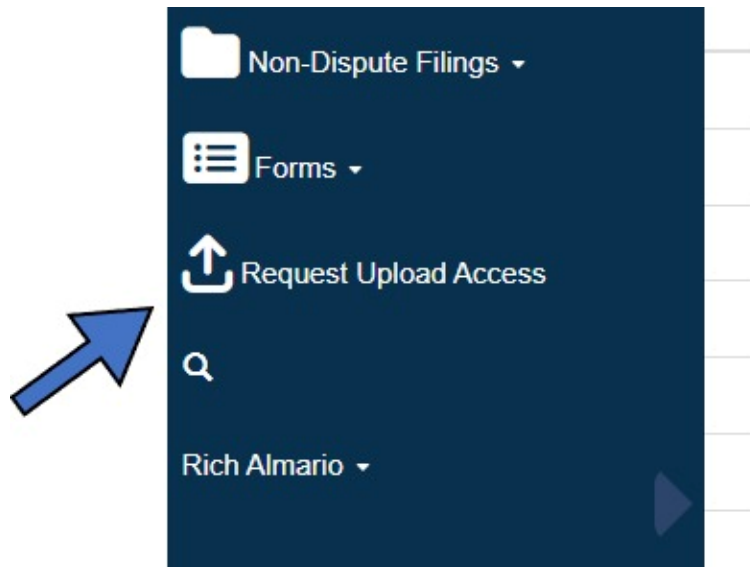
2. Select a **Dispute Name** to view the details from the Disputes list.

Dispute Name	Dispute Number	Agreement Type	Dispute Type
Candace Thursday	CDA-USA-2023-10.12-09	USMCA	Article 10.12
Candace Friday	CDA-MEX-2023-10.12-04	USMCA	Article 10.12
DEMO	CDA-USA-2023-10.12-13	USMCA	Article 10.12
Candace Final Test	USA-CDA-2023-10.12-15	USMCA	Article 10.12
SL AD 88	USA-CDA-2023-31-09	USMCA	Chapter 31
PENDING DISPUTE	CDA-MEX-2023-10.12-02	USMCA	Article 10.12

## Gaining Access to Upload Filings

Users that need to upload a filing should request upload access.

1. Navigate to the **Request Upload Access** link using the system's left navigation menu and click the link.



2. Complete the "Request Upload Access" form with the following information:

**Access Type:** Select the type of access type needed.

- Dispute
- Request for Panel Review
- Notice of Intent to Commence Judicial Review
- Request for Establishment of a Panel
- Request for Consultation

Please only Request Upload Access if you are involved in a dispute and need to submit a filing, or if you need to upload a Notice of Intent to Commence Judicial Review, Request for Consultations, Request for Panel Review, or Request for Establishment of a Panel.

A form titled 'Request Upload Access'. The first section is labeled 'Access Type' and contains a dropdown menu. A blue dashed box highlights the dropdown arrow, and a blue arrow points to it from the right. Below this is a 'Submit' button.

Complete the steps below if the Access Type is Dispute.

3. Click the **magnifying glass** in the Dispute field to select the Dispute.

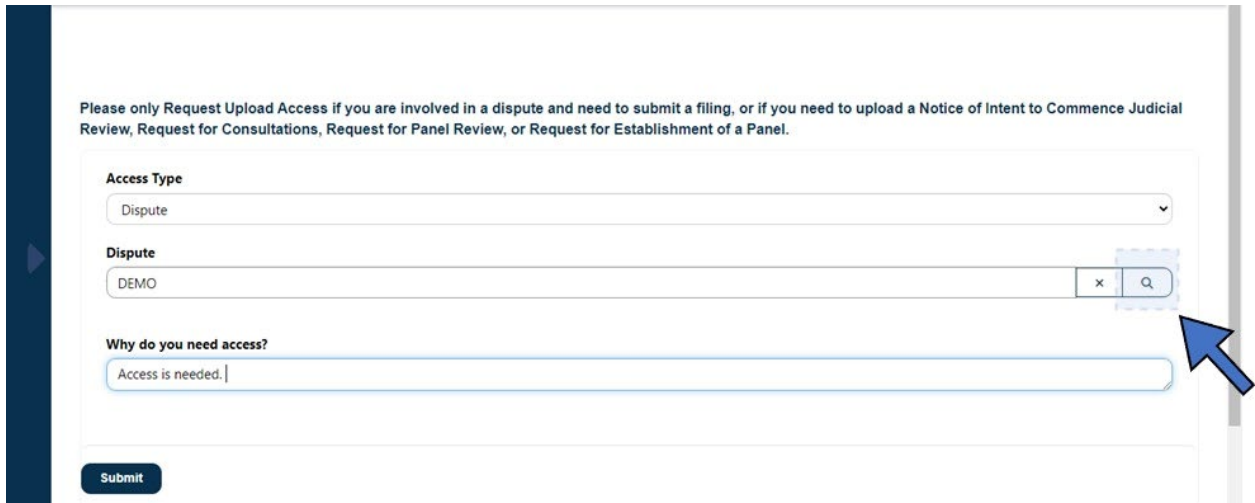
Please only Request Upload Access if you are involved in a dispute and need to submit a filing, or if you need to upload a Notice of Intent to Commence Judicial Review, Request for Consultations, Request for Panel Review, or Request for Establishment of a Panel.

**Access Type**  
 Dispute

**Dispute**  
 DEMO

**Why do you need access?**  
 Access is needed.

Submit



4. Select the Dispute from the pop-up modal menu by clicking the circle of the desired Dispute and then click the **Select** button to populate the Dispute field.

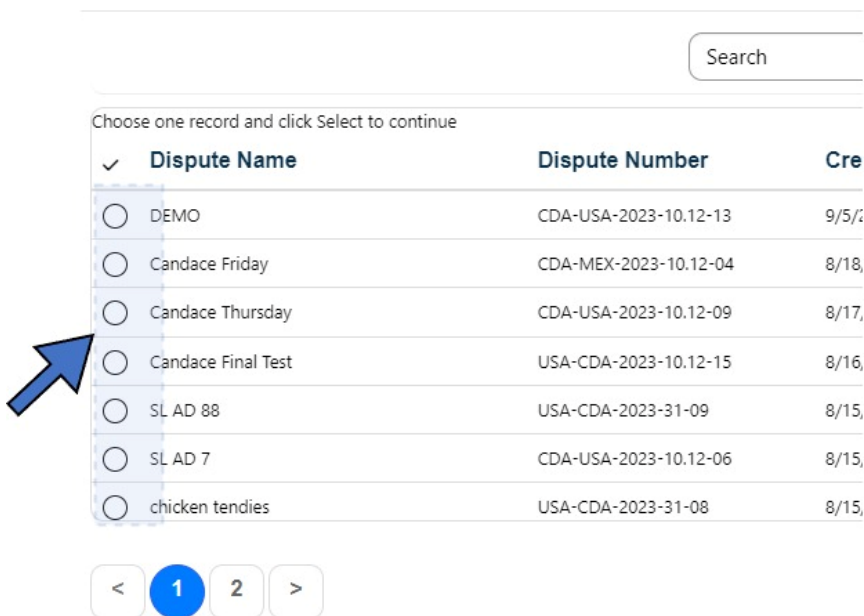
[Lookup records](#)

Search

Choose one record and click Select to continue

✓	Dispute Name	Dispute Number	Cre
<input type="radio"/>	DEMO	CDA-USA-2023-10.12-13	9/5/2
<input type="radio"/>	Candace Friday	CDA-MEX-2023-10.12-04	8/18,
<input type="radio"/>	Candace Thursday	CDA-USA-2023-10.12-09	8/17,
<input type="radio"/>	Candace Final Test	USA-CDA-2023-10.12-15	8/16,
<input type="radio"/>	SL AD 88	USA-CDA-2023-31-09	8/15,
<input type="radio"/>	SL AD 7	CDA-USA-2023-10.12-06	8/15,
<input type="radio"/>	chicken tendies	USA-CDA-2023-31-08	8/15,

< 1 2 >



5. **Why is Access needed?** Briefly explain why you need upload access in the text field.

**Why do you need access?**

To upload a filing to this dispute.

6. Press the **Submit** button to complete the **Request Upload Access**.
7. A new window will show after completing the form that the submission was completed successfully.

**Please only Request Upload Access if you are involved in a dispute and need to submit a filing, or if you need to upload a Notice of Intent to Commence Judicial Review, Request for Consultations, Request for Panel Review, or Request for Establishment of a Panel.**

Submission completed successfully.



Complete the steps below if the **Access Type** is the following:

- Request for Panel Review
- Notice of Intent to Commence Judicial Review
- Request for Establishment of a Panel
- Request for Consultation

An Example of **Request for Panel Review** is shown below:

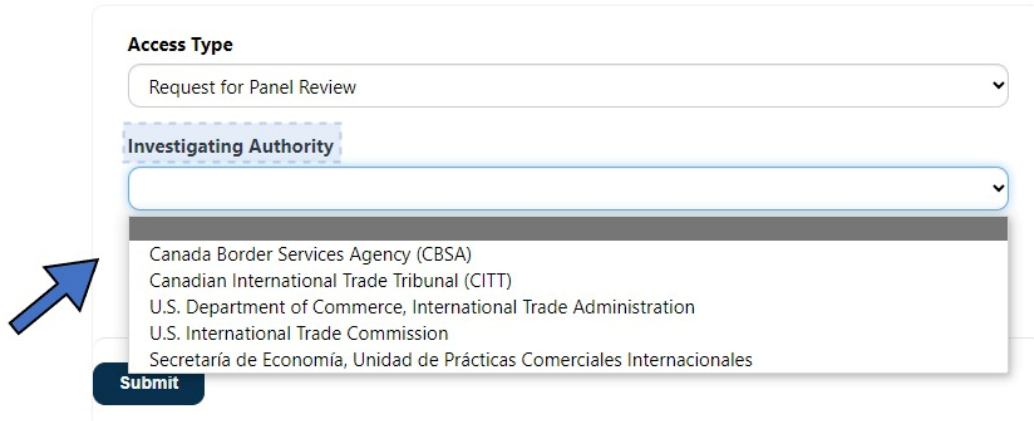
1. Select *Request for Panel Review* from the Access Type.

**Please only Request Upload Access if you are involved in a dispute and need to submit a filing, or if you need to upload a Notice of Intent to Commence Judicial Review, Request for Consultations, Request for Panel Review, or Request for Establishment of a Panel.**

The screenshot shows a web form with a dropdown menu labeled "Access Type". The dropdown is open, showing a list of options: "Dispute", "Request for Panel Review", "Notice of Intent to Commence Judicial Review", "Request for Establishment of a Panel", and "Request for Consultation". The option "Request for Panel Review" is highlighted with a blue background. A blue arrow points to this option. Below the dropdown is a dark blue "Submit" button.

2. Select the applicable Investigating Authority from the drop-down menu.

Please only Request Upload Access if you are involved in a dispute and need to submit a filing, or if you need to upload a Notice of Intent to Commence Judicial Review, Request for Consultations, Request for Panel Review, or Request for Establishment of a Panel.



**Access Type**

Request for Panel Review

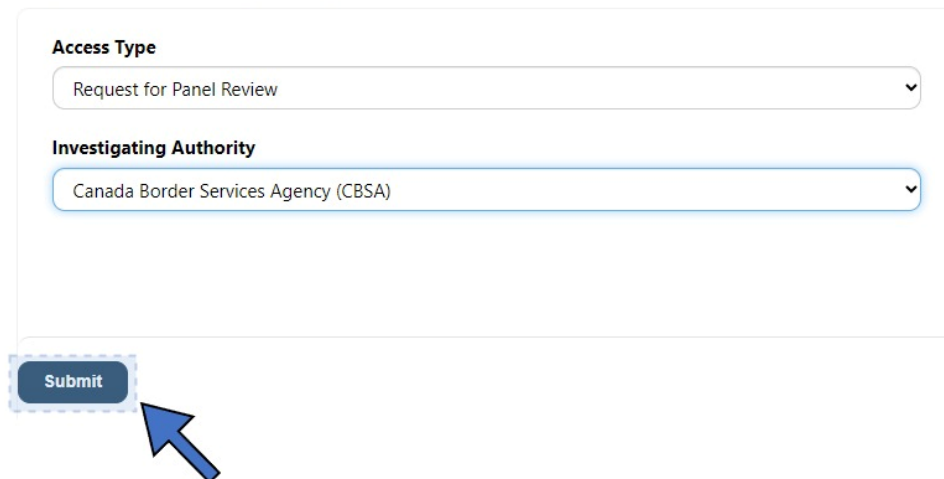
**Investigating Authority**

- Canada Border Services Agency (CBSA)
- Canadian International Trade Tribunal (CITT)
- U.S. Department of Commerce, International Trade Administration
- U.S. International Trade Commission
- Secretaría de Economía, Unidad de Prácticas Comerciales Internacionales

**Submit**

3. Click the **Submit** button.

Please only Request Upload Access if you are involved in a dispute and need to submit a filing, or if you need to upload a Notice of Intent to Commence Judicial Review, Request for Consultations, Request for Panel Review, or Request for Establishment of a Panel.



**Access Type**

Request for Panel Review

**Investigating Authority**

Canada Border Services Agency (CBSA)

**Submit**

## Submitting Filings

### General Filing Guidance

All filings submitted via the TAS E-filing System will be considered the “original version” for purposes of compiling the record of the dispute.

All filings should be submitted as searchable PDFs whenever possible. Documents submitted in other formats such as Microsoft Word, PowerPoint, and Excel are acceptable, and will be converted into PDFs for the approval process.

**Note:** When uploading an Excel file please follow the [‘Excel to PDF Conversion’](#) guidance at the end of this document.

The USMCA/CUSMA/T-MEC Secretariat’s normal business hours apply to filings submitted via the TAS E- filing System.

The normal business hours for the U.S. and Canadian Sections are 9:00 am to 5:00 pm Eastern Time (ET). The normal business hours for the Mexican Section are 9:00 am to 5:00 pm Central Standard Time (CST). Filings submitted outside of normal business hours will be reviewed and processed the next business day.

Filings should be submitted to the U.S. or Canadian Sections **no later than 4:00 PM** ET on the day the filing is due. Filings should be submitted to the Mexican Section **no later than 4:00 PM** CST on the day the filing is due.

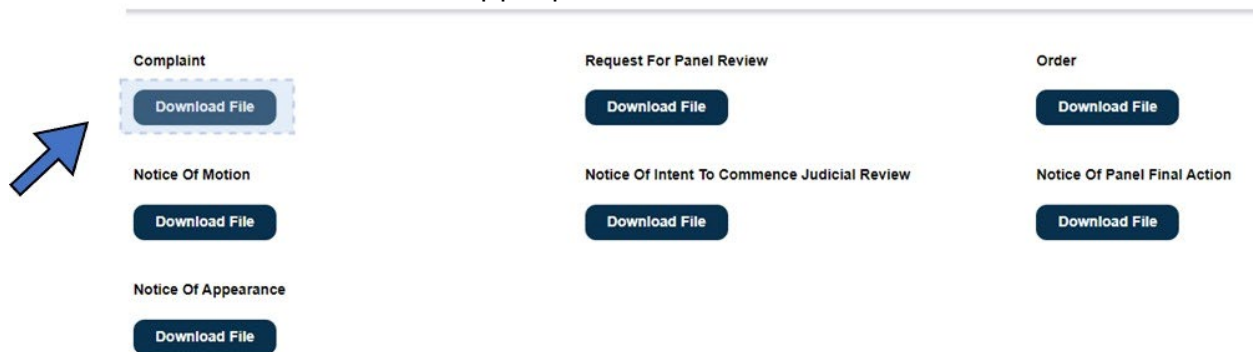
## Procedural Forms

Access USMCA procedural forms by completing the following steps:

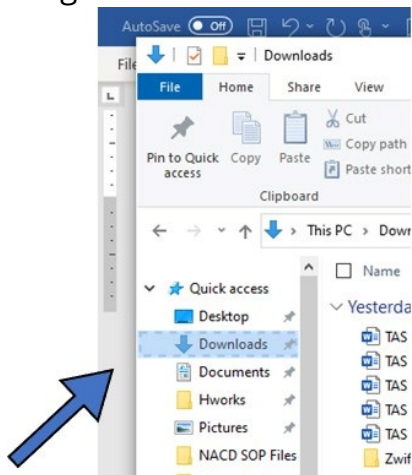
1. Navigate to the left-navigation menu and select **Forms**.
2. Select **Procedural Forms** from the drop-down menu.



3. Click **Download File** under the appropriate form.



4. Navigate to the **Downloads** files on your computer.





5. Open and complete the form.

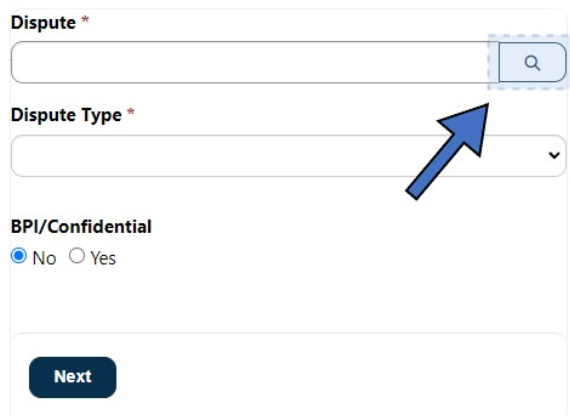
<i>COMPLAINT</i>	
1.	_____ (The name of the interested person filing the complaint)
2.	_____ (The name of counsel for the interested person, if any)
3.	_____ _____ _____ (The service address, as defined in Rule 5 of the Rules of Procedure for Article 10.12 (Review of Final Antidumping and Countervailing Duty Determinations) of the Agreement (Binational Panel Rules), including an electronic mail address, if any)
4.	_____ (The telephone number and electronic mail address of counsel for the interested person or telephone number and electronic mail address of the interested person, if not represented by counsel)

## Uploading a Filing to a Dispute

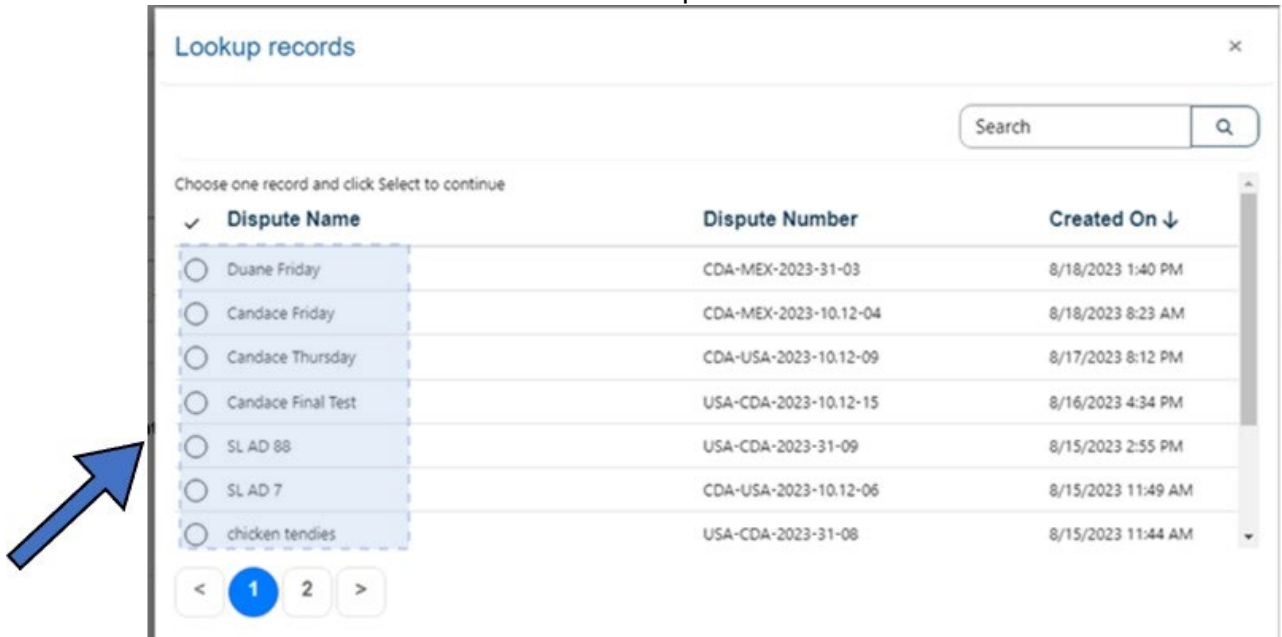
1. From the left navigation menu, click **Upload Filing** and then click **Dispute Filing**.



2. Click on the magnifying glass in the Dispute field.

A screenshot of a web form titled 'Dispute \*'. It contains three main sections. The first section is a text input field with a magnifying glass icon in a small box on its right side. The second section is labeled 'Dispute Type \*' and features a dropdown menu. The third section is labeled 'BPI/Confidential' and has two radio buttons: 'No' (which is selected) and 'Yes'. At the bottom of the form is a dark blue button labeled 'Next'. A blue arrow points from the left towards the magnifying glass icon in the first section.

3. Select the radio button beside the desired dispute and then click **Select**.



Lookup records

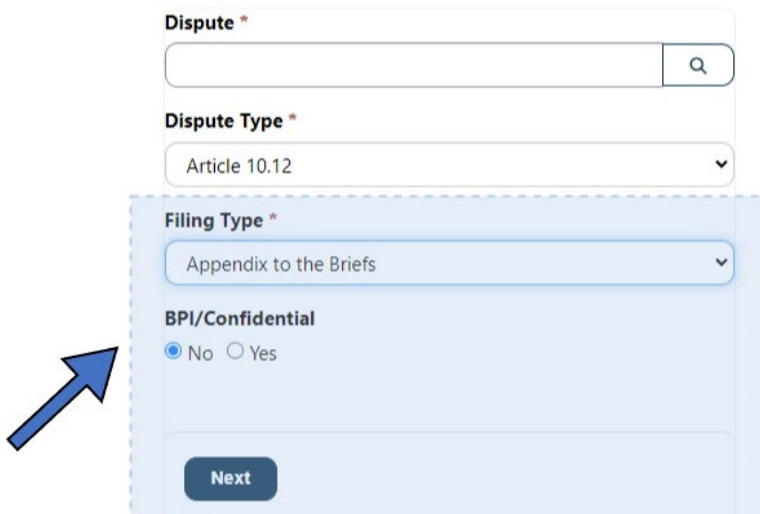
Search

Choose one record and click Select to continue

Dispute Name	Dispute Number	Created On ↓
<input type="radio"/> Duane Friday	CDA-MEX-2023-31-03	8/18/2023 1:40 PM
<input type="radio"/> Candace Friday	CDA-MEX-2023-10.12-04	8/18/2023 8:23 AM
<input type="radio"/> Candace Thursday	CDA-USA-2023-10.12-09	8/17/2023 8:12 PM
<input type="radio"/> Candace Final Test	USA-CDA-2023-10.12-15	8/16/2023 4:34 PM
<input type="radio"/> SL AD 88	USA-CDA-2023-31-09	8/15/2023 2:55 PM
<input type="radio"/> SL AD 7	CDA-USA-2023-10.12-06	8/15/2023 11:49 AM
<input type="radio"/> chicken tendies	USA-CDA-2023-31-08	8/15/2023 11:44 AM

< 1 2 >

5. Select **the Filing Type** from the dropdown menu and then move to the **BPI/Confidential** choice.



Dispute \*

Dispute Type \*

Article 10.12

Filing Type \*

Appendix to the Briefs

BPI/Confidential

☒ No ☐ Yes

Next

6. Select the circular button **No** or **Yes** for the BPI/Confidential option. If you select Yes then you will receive a confirmation dialog box that displays:  
*"BPI/Confidential flag has been selected. Please confirm this is correct."*

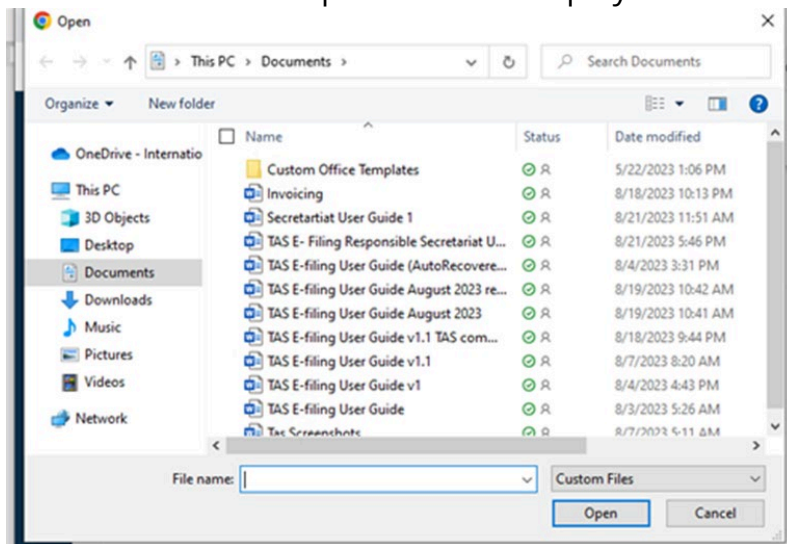
**tasstaging.powerappsportals.us says**

BPI/Confidential flag has been selected. Please confirm this is correct.

OK

Cancel

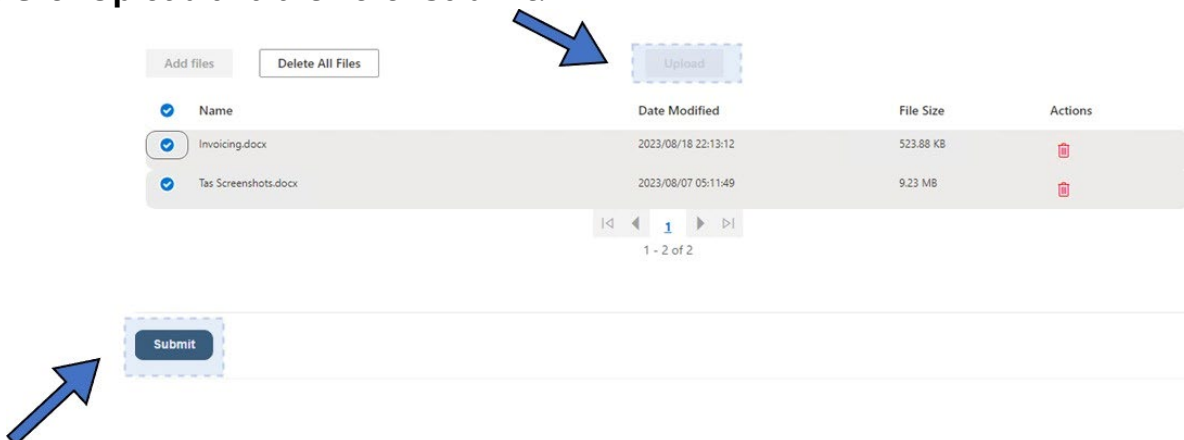
7. Click **Next**. The File Explorer will be displayed as shown.



8. Select the applicable file(s) from your computer.

9. Click **Open** on the file explorer.

10. Click **Upload** and then click **Submit**.



11. The “Submission completed successfully.” message will display.



## Uploading an Article 10.12 Request for Panel Review

1. Click **Upload Filing** from the left navigation menu and then click **Request for Panel Review**.



The Agreement Type is populated with **USMCA**.

The Dispute Type field will populate with **Article 10.12**.

A screenshot of a form with several fields. The first field is 'Agreement Type' with the value 'USMCA'. The second field is 'Dispute Type' with a dropdown menu showing 'Article 10.12'. Below these are three more dropdown menus: 'Responsible Section of the Secretariat', 'Involved Office', and 'Investigating Authority \*'. A blue arrow points from the left towards the 'Dispute Type' field. At the bottom of the form is a 'Next' button.

Agreement Type

USMCA

Dispute Type

Article 10.12

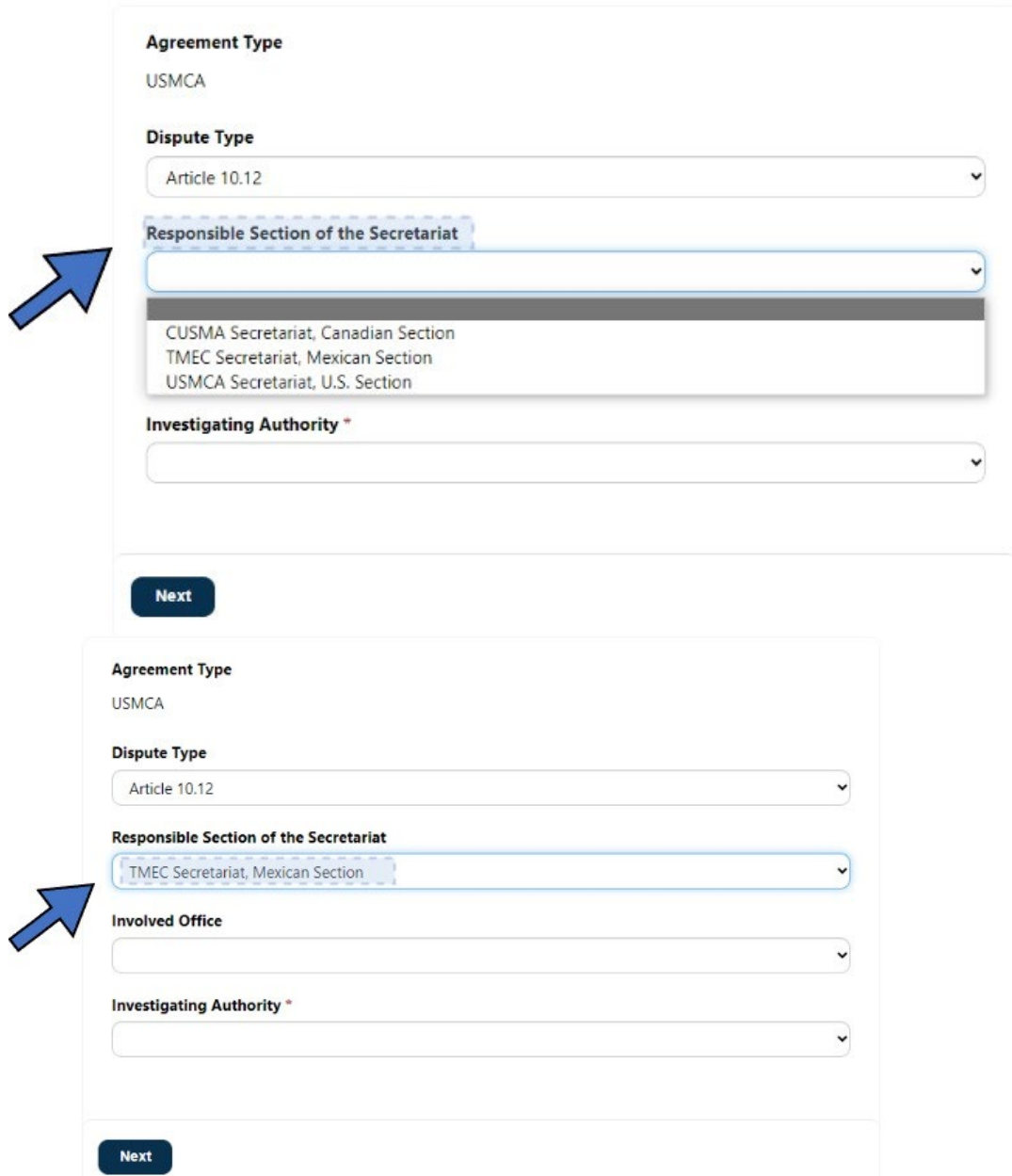
Responsible Section of the Secretariat

Involved Office

Investigating Authority \*

Next

2. Select the **Responsible Section of the Secretariat** from the drop-down menu.



The image displays two sequential screenshots of a web form, illustrating the selection process for the 'Responsible Section of the Secretariat'.

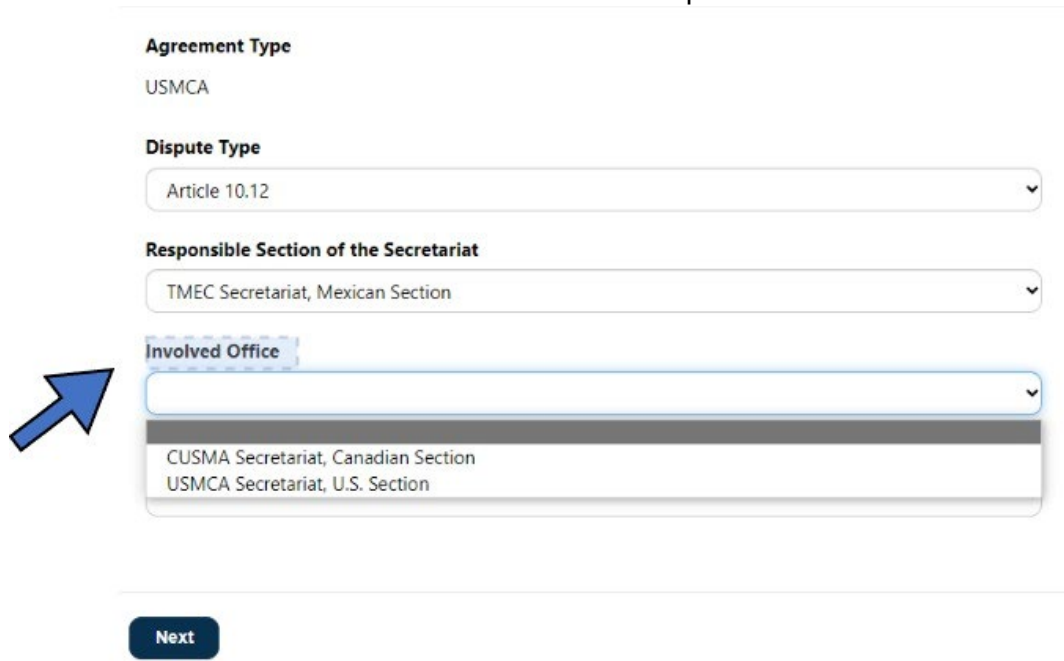
**Top Screenshot:**

- Agreement Type:** USMCA
- Dispute Type:** Article 10.12
- Responsible Section of the Secretariat:** The dropdown menu is open, showing three options: 'CUSMA Secretariat, Canadian Section', 'TMEC Secretariat, Mexican Section', and 'USMCA Secretariat, U.S. Section'. A blue arrow points to this dropdown.
- Investigating Authority \*:** (Empty dropdown)
- Next:** A dark blue button at the bottom.

**Bottom Screenshot:**

- Agreement Type:** USMCA
- Dispute Type:** Article 10.12
- Responsible Section of the Secretariat:** The dropdown menu is open, and 'TMEC Secretariat, Mexican Section' is selected. A blue arrow points to this dropdown.
- Involved Office:** (Empty dropdown)
- Investigating Authority \*:** (Empty dropdown)
- Next:** A dark blue button at the bottom.

3. Select the **Involved Office** from the drop-down menu.

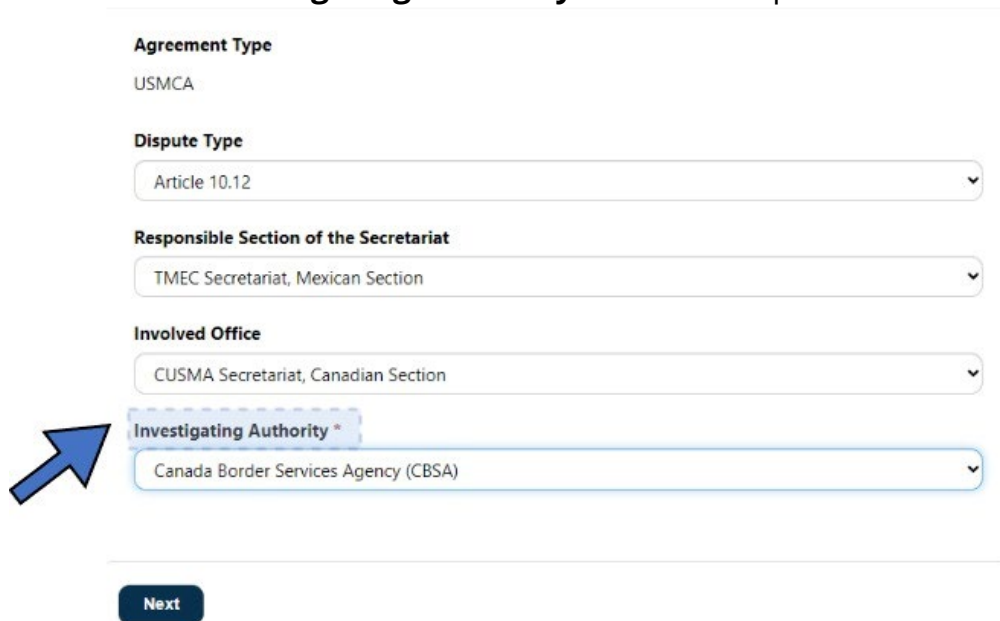


The screenshot shows a form with the following fields:

- Agreement Type**: USMCA
- Dispute Type**: Article 10.12
- Responsible Section of the Secretariat**: TMEC Secretariat, Mexican Section
- Involved Office**: A dropdown menu with a blue arrow pointing to it. The menu is open, showing two options: "CUSMA Secretariat, Canadian Section" and "USMCA Secretariat, U.S. Section".

At the bottom of the form is a **Next** button.

4. Select the **Investigating Authority** from the drop-down menu.



The screenshot shows a form with the following fields:

- Agreement Type**: USMCA
- Dispute Type**: Article 10.12
- Responsible Section of the Secretariat**: TMEC Secretariat, Mexican Section
- Involved Office**: CUSMA Secretariat, Canadian Section
- Investigating Authority \***: A dropdown menu with a blue arrow pointing to it. The menu is open, showing one option: "Canada Border Services Agency (CBSA)".

At the bottom of the form is a **Next** button.

The Filing Type field populates with Request for Panel Review.

6. Select the **BPI/Confidential radio** button.

7. Click the **Next** Button.




**Filing Type \***

Request for Panel Review ▼

**BPI/Confidential**

☒ No ☐ Yes

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




8. Click **Add Files**. The files from your computer display.

**Dispute**

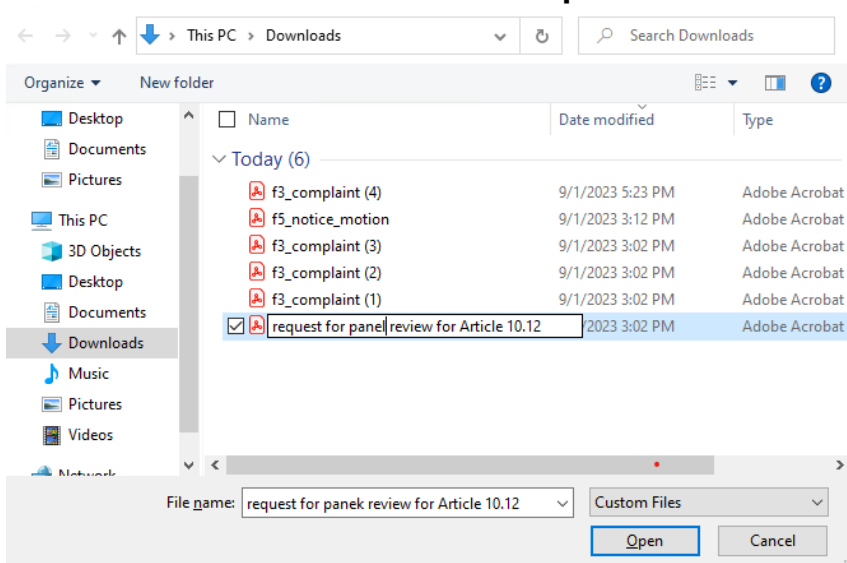
—

[Add files](#) [Upload](#)

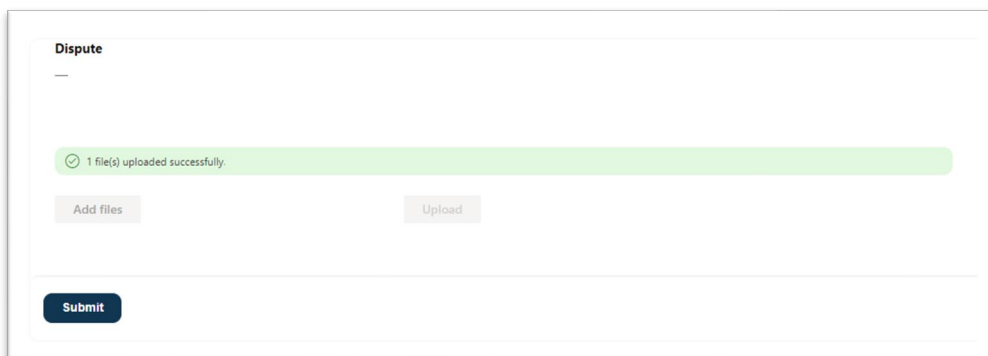
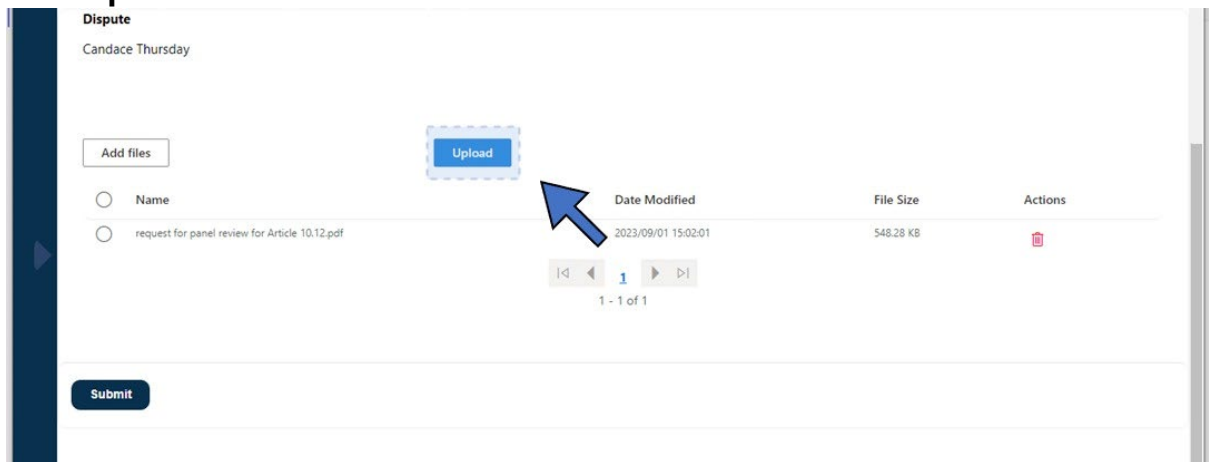
[Submit](#)



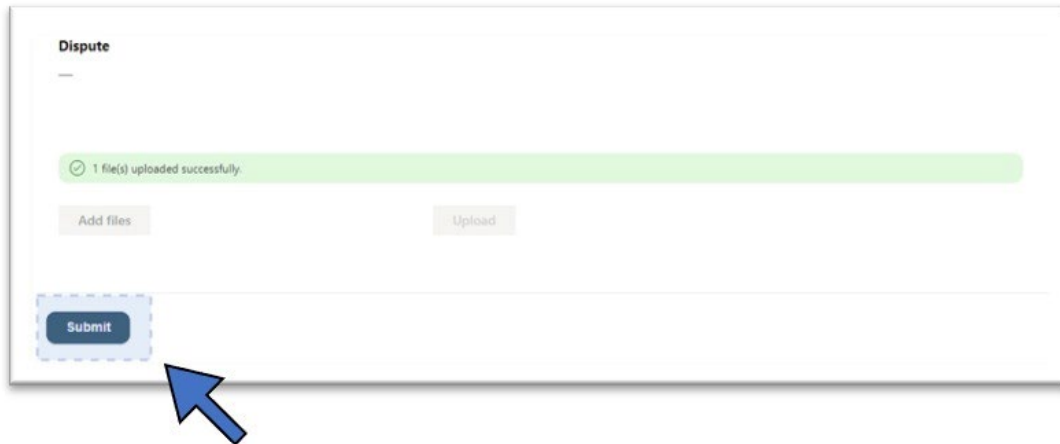
9. Select the file or files and then click **Open**.



10. Click **Upload**.



11. Click **Submit** when the upload process is complete.



12. The *"Submission completed successfully"* message will display.

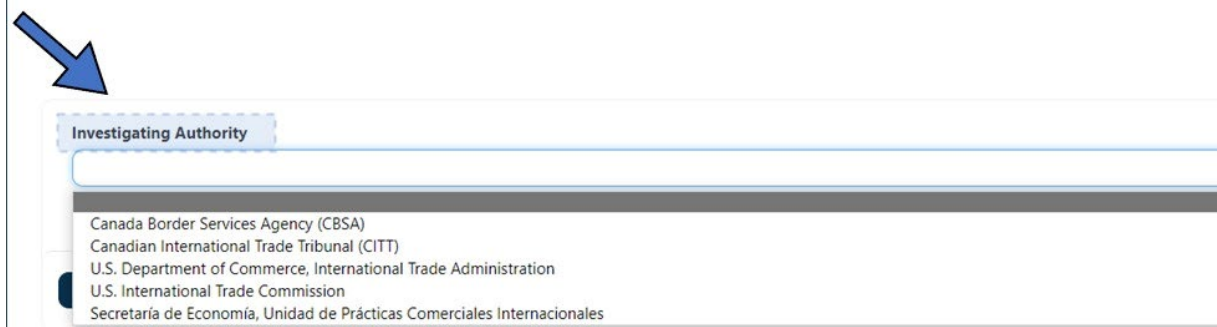
Submission completed successfully.

## Uploading an Article 10.12 Notice of Intent to Commence Judicial Review

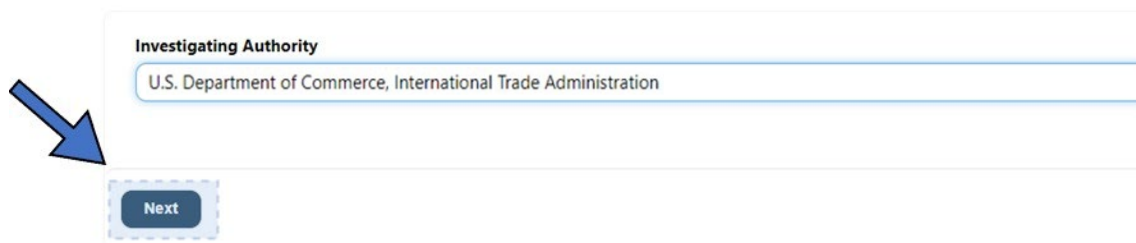
1. Click Upload Filing from the left navigation menu and then click **Notice of Intent to Commence Judicial Review**.



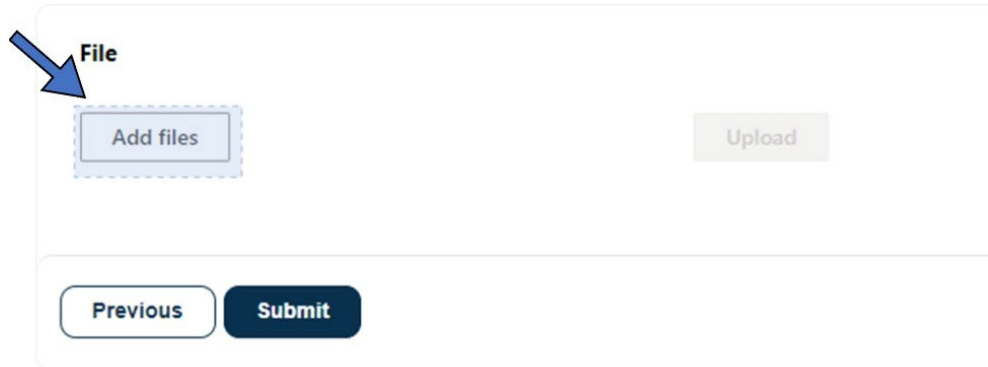
2. Select the **Investigating Authority** from the drop-down menu.



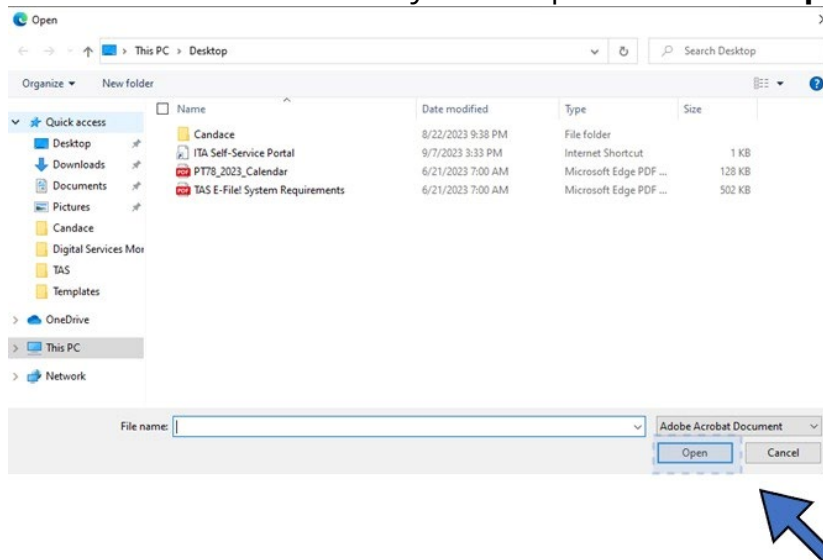
3. Click the **Next** button.



4. Click **Add Files**.

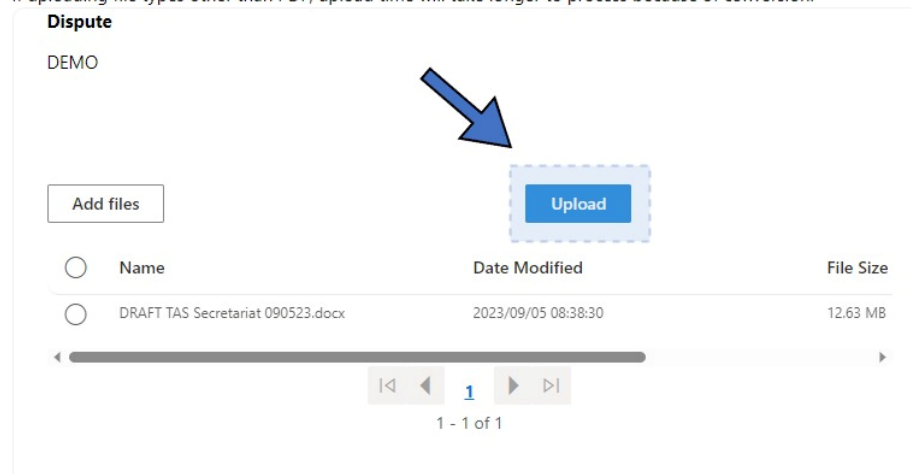


5. Select a file or files from your computer and click **Open**.



7. Click **Upload**.

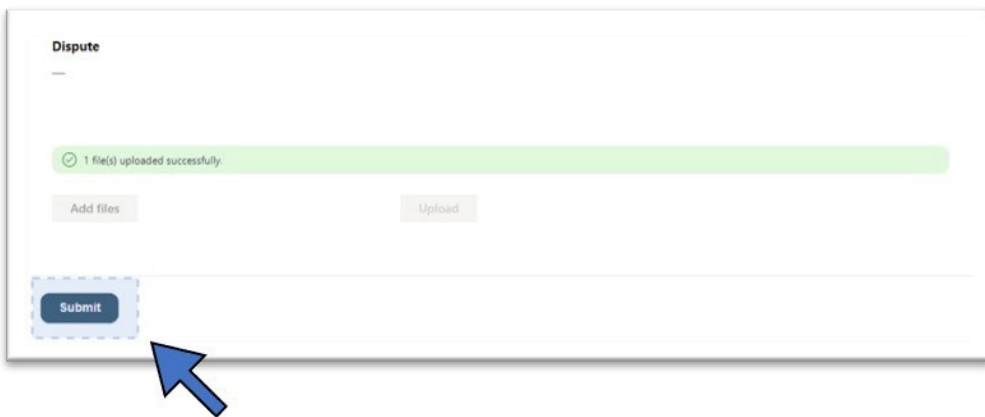
If uploading file types other than PDF, upload time will take longer to process because of conversion.





The screenshot shows a web form titled "Dispute". At the top, there is a green success message: "1 file(s) uploaded successfully." Below this message are two buttons: "Add files" and "Upload". At the bottom of the form is a dark blue button labeled "Submit".

8. Click the **Submit** button.



This screenshot is identical to the previous one, but with a blue arrow pointing to the "Submit" button, indicating the next step in the process.

The *"Submission completed successfully"* message will display.



The screenshot shows a wider view of the application interface. On the left is a dark blue vertical sidebar. At the top of the main content area is a circular icon. A green success message bar spans the width of the content area, displaying the text "Submission completed successfully."

## Uploading a Chapter 31 Request for Consultations

1. Select Upload Filing from the left navigation menu, and then select **Request for Consultations**.



2. Select a **Responsible Section of the Secretariat** by clicking the ▼ arrow in the Responsible Section of the Secretariat field.

A screenshot of a form field titled 'Responsible Section of the Secretariat'. The field is a white box with a blue border and a small downward arrow on the right. Below the field is a dropdown menu with a grey header bar. The menu contains three options: 'CUSMA Secretariat, Canadian Section', 'TMEC Secretariat, Mexican Section', and 'USMCA Secretariat, U.S. Section'.

- CUSMA Secretariat, Canadian Section
  - TMEC Secretariat, Mexican Section
  - USMCA Secretariat, U.S. Section
3. Click **Next**.

**Responsible Section of the Secretariat**

CUSMA Secretariat, Canadian Section ▼

**Next**

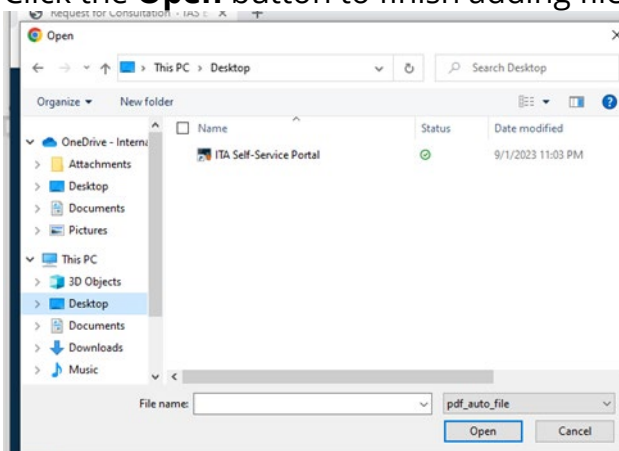
4. Click **Add Files**.

**Files**

**Add files** **Upload**

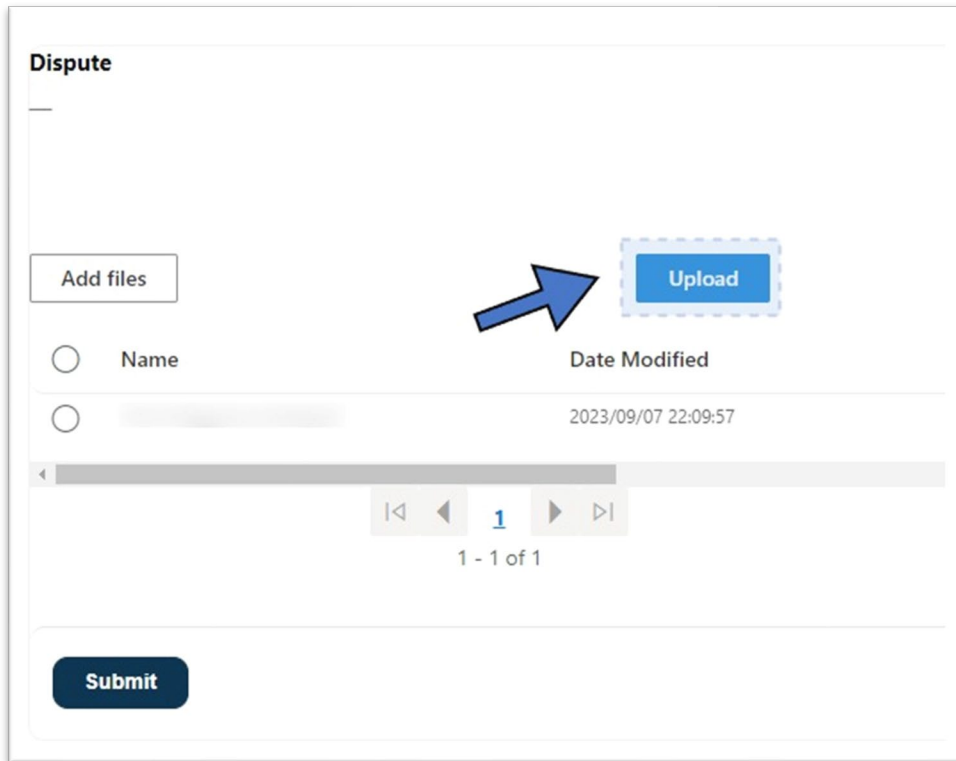
5. Select the applicable file(s) from your computer.

6. Click the **Open** button to finish adding files.



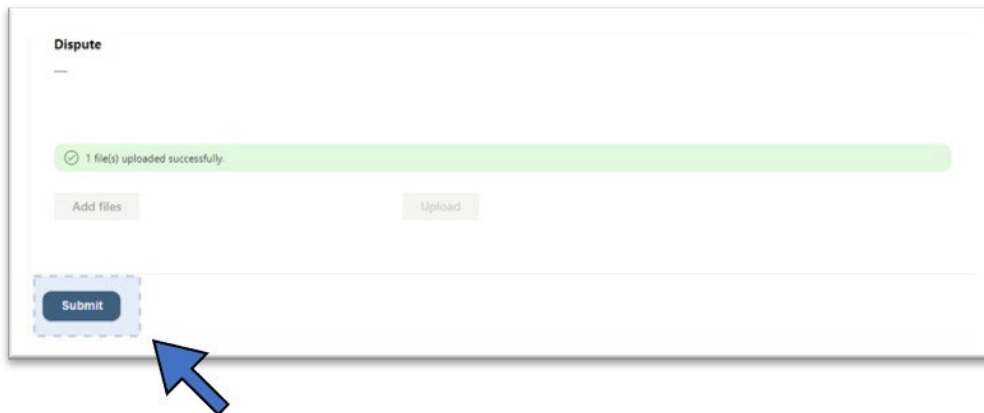


7. Click **Upload**. A *File(s) upload successfully* message displays.



The screenshot shows a web form titled "Dispute". At the top left is a text input field. Below it is a button labeled "Add files". To the right of this button is a blue button labeled "Upload", which is highlighted with a dashed blue border and a blue arrow pointing to it. Below the "Add files" button is a table with two columns: "Name" and "Date Modified". The table contains one row with a radio button in the "Name" column and the date "2023/09/07 22:09:57" in the "Date Modified" column. Below the table is a pagination bar showing "1 - 1 of 1". At the bottom left of the form is a dark blue button labeled "Submit".

8. Click the **Submit** button.



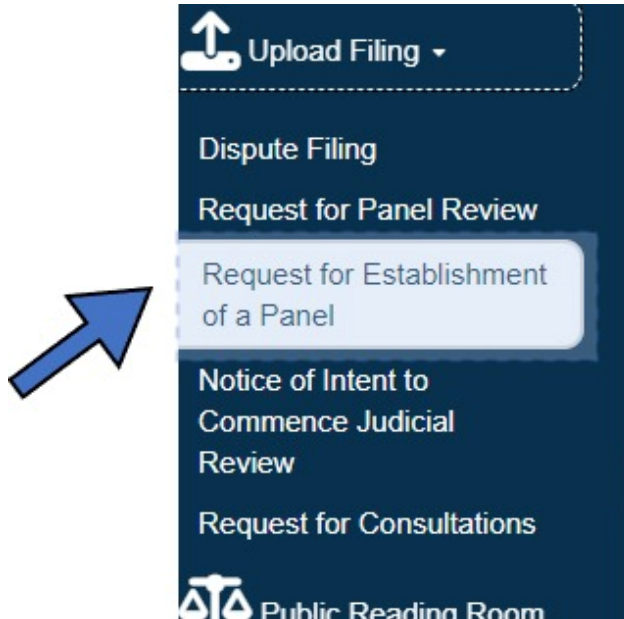
The screenshot shows the same "Dispute" form as before, but with a green success message at the top: "1 file(s) uploaded successfully." Below this message are the "Add files" and "Upload" buttons. The "Submit" button at the bottom left is now highlighted with a dashed blue border and a blue arrow pointing to it.

9. *Submission completed successfully* displays.

Submission completed successfully.

## Uploading a Chapter 31 Request for Establishment of a Panel

1. Select Home from the left navigation menu and click **Request for Establishment of a Panel**.

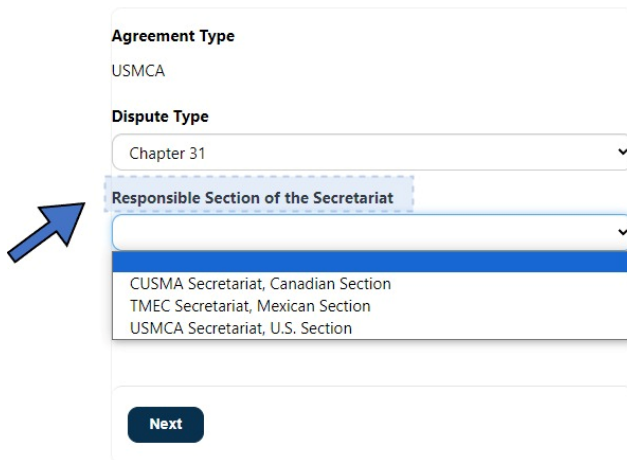


2. Select the **Dispute Type** from the drop-down menu:
  - Chapter 31
  - Chapter 31 A
  - Chapter 31 B

A screenshot of a web form. The 'Agreement Type' field is set to 'USMCA'. The 'Dispute Type' dropdown menu is open, showing 'Chapter 31' as the selected option. Below it, a list of options is visible: 'Chapter 31', 'Chapter 31A', and 'Chapter 31B'. The 'Involved Office' field is empty. At the bottom of the form is a dark blue 'Next' button. A blue arrow points from the left towards the 'Dispute Type' dropdown menu.

3. Select a **Responsible Section of the Secretariat** by clicking the arrow in the field:

- CUSMA Secretariat, Canada Section
- TMEC Secretariat, Mexican Section
- USMCA Secretariat, U. S. Section

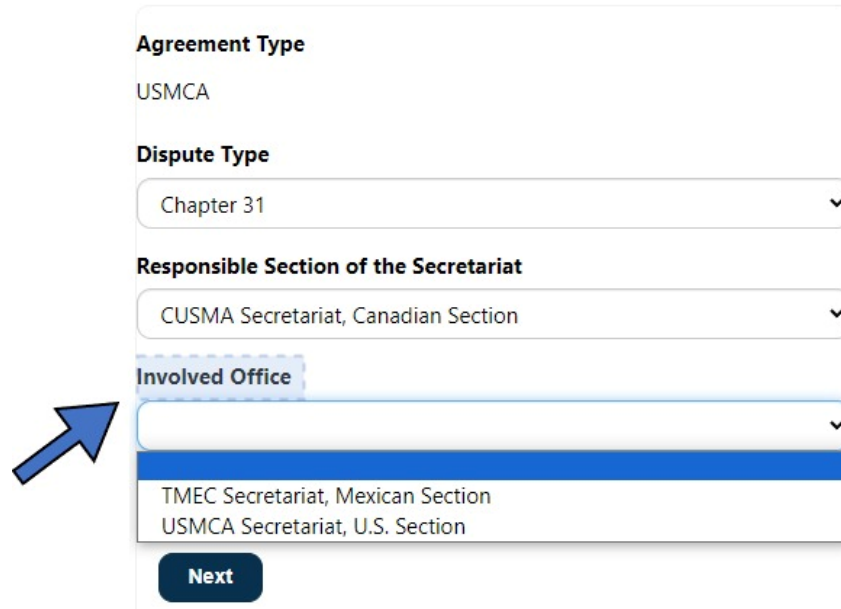


The screenshot shows a web form with the following fields:

- Agreement Type**: A text field containing "USMCA".
- Dispute Type**: A dropdown menu with "Chapter 31" selected.
- Responsible Section of the Secretariat**: A dropdown menu with a blue arrow pointing to it. The menu is open, showing three options: "CUSMA Secretariat, Canadian Section", "TMEC Secretariat, Mexican Section", and "USMCA Secretariat, U.S. Section".
- Next**: A dark blue button at the bottom.

4. Select the **Involved Office** from the drop-down menu:

- CUSMA Secretariat, Canada Section
- TMEC Secretariat, Mexican Section
- USMCA Secretariat, U. S. Section



**Agreement Type**  
USMCA

**Dispute Type**  
Chapter 31

**Responsible Section of the Secretariat**  
CUSMA Secretariat, Canadian Section

**Involved Office**

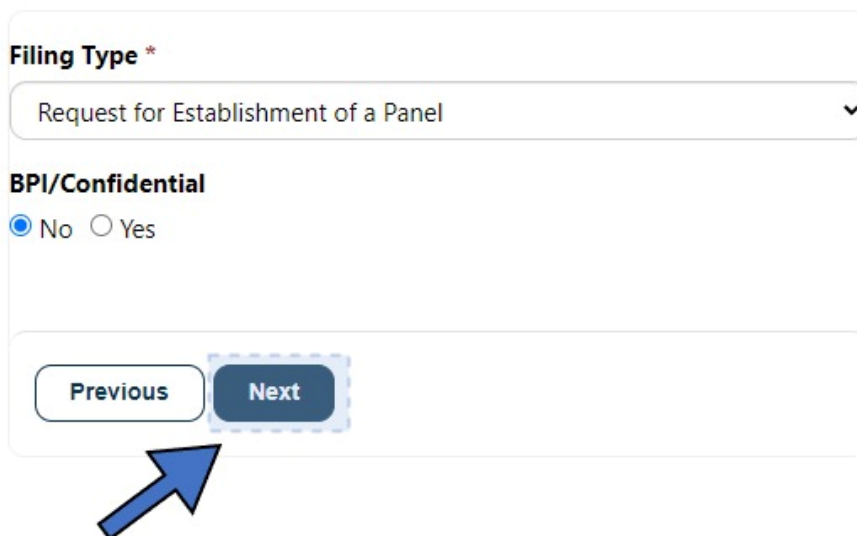
TMEC Secretariat, Mexican Section  
USMCA Secretariat, U.S. Section

**Next**

5. Click the **Next** button to confirm selection.

6. *Request for Establishment of a Panel* auto-populates as the **Filing Type**.

7. Click **Next**.

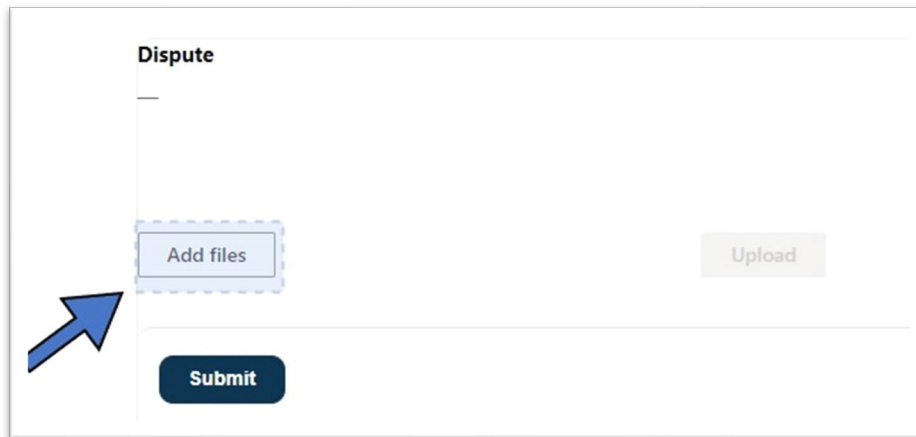


**Filing Type \***  
Request for Establishment of a Panel

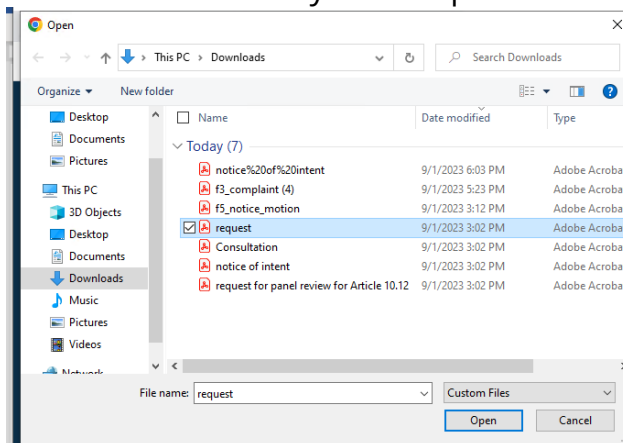
**BPI/Confidential**  
☒ No ☐ Yes

**Previous** **Next**

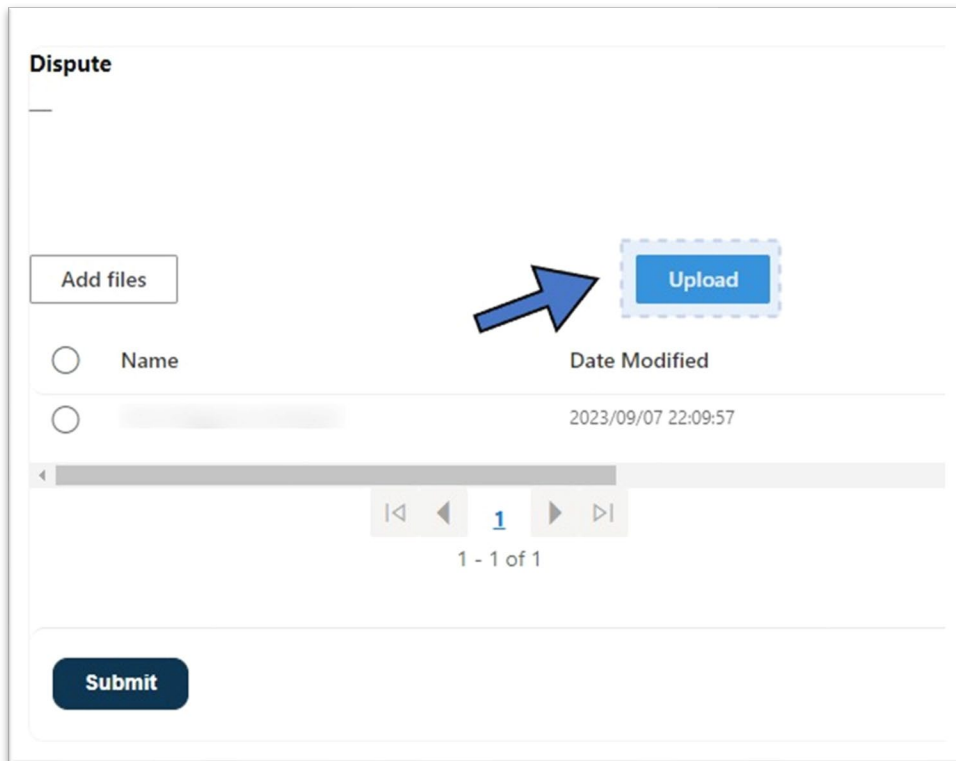
8. Click **Add Files** to select files from your computer.



9. Select the files from your computer. Then Click the **Open** button.

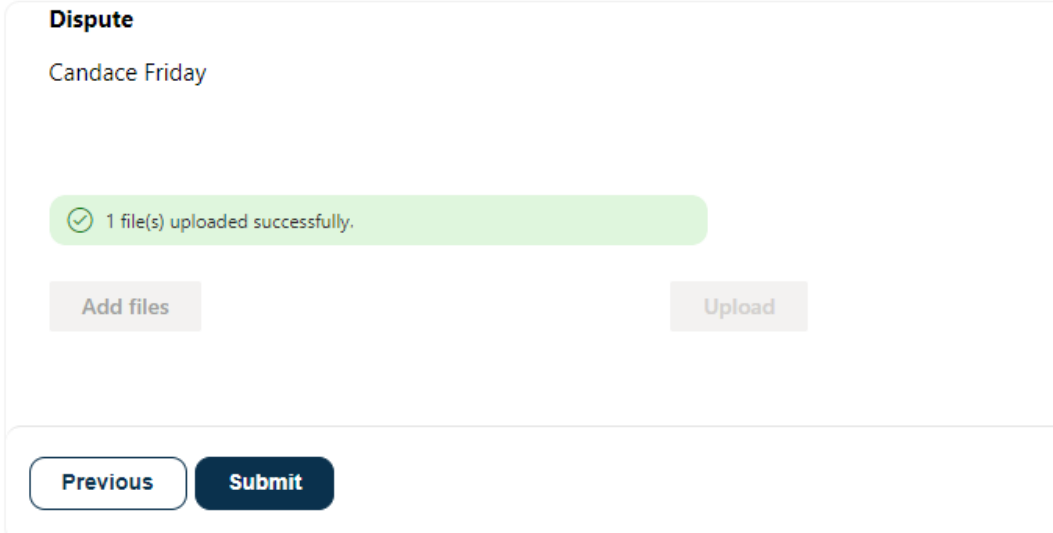


10. Click **Upload**. A *File(s) upload successfully* message displays.



The screenshot shows a web form titled "Dispute". At the top left is a text input field. Below it is a button labeled "Add files". To the right of this button is a blue "Upload" button, which is highlighted with a dashed blue border and a blue arrow pointing to it. Below the "Add files" button is a table with two columns: "Name" and "Date Modified". The table contains one row with a radio button in the "Name" column and the date "2023/09/07 22:09:57" in the "Date Modified" column. Below the table is a pagination bar showing "1" in a blue box, with navigation arrows and the text "1 - 1 of 1". At the bottom left of the form is a dark blue "Submit" button.

If uploading file types other than PDF, upload time will take longer to process because of conversion.



The screenshot shows the "Dispute" form after a successful upload. A green message box at the top says "1 file(s) uploaded successfully." with a checkmark icon. Below this are the "Add files" and "Upload" buttons, which are now disabled (grayed out). At the bottom of the form are two buttons: "Previous" and "Submit". The "Submit" button is dark blue and active, while "Previous" is white with a gray border.

11. Click **Submit**.


If uploading file types other than PDF, upload time will take longer to process because of conversion.

**Dispute**  
Candace Friday

✓ 1 file(s) uploaded successfully.

Add filesUpload

PreviousSubmit



12. *Submission completed successfully* displays.




Submission completed successfully.

## Dispute Details


Below is the dashboard view of the Disputes in the TAS E-filing System. This view is available from the home page if file upload privileges are granted.

### Dashboard View – My Involved Disputes

- Dispute Name – The user can click on the Dispute Name to open the Dispute.



### My Involved Disputes

Search 



Dispute Name	Dispute Number	Agreement Type	Dispute Type
Candace Thursday	CDA-USA-2023-10.12-09	USMCA	Article 10.12
Candace Friday	CDA-MEX-2023-10.12-04	USMCA	Article 10.12
Candace Final Test	USA-CDA-2023-10.12-15	USMCA	Article 10.12
SL AD 88	USA-CDA-2023-31-09	USMCA	Chapter 31
Duane Friday	CDA-MEX-2023-31-03	USMCA	Chapter 31
Widgets from Canada	U.S.-CDA-2023-10.12-14	USMCA	Article 10.12
Energy Safeguard Measure	U.S.-MEX-2023-31-03	USMCA	Chapter 31
chicken tendies	USA-CDA-2023-31-08	USMCA	Chapter 31


## Dispute Fields

### Viewing Dispute Details

To view dispute details, click on the Dispute Name.

The below fields are visible after clicking on a particular Dispute Name. The *Start Date* is the date on which the Request for Panel Review or Request for a Establishment of a Panel is filed.

<b>Dispute Number</b>	<b>Dispute Name *</b>
CDA-USA-2023-10.12-09	Candace Thursday
<b>Agreement Type</b>	<b>Dispute Type</b>
USMCA	Article 10.12
<b>Responsible Office</b>	<b>Involved Office</b>
CUSMA Secretariat, Canadian Section	USMCA Secretariat, U.S. Section
<b>Investigating Authority</b>	<b>Start Date</b>
Canadian International Trade Tribunal (CITT)	8/17/2023
<b>Docket</b>	



## Case Docket

The docket is located within the Dispute, as shown below.

### Docket

Filing Number ↓	Filing Type	BPI/Confidential	Filed By	Filed On	Docketed On	
04	Complaint	No	Candace Ellerbe	9/11/2023 3:41 PM	9/11/2023 3:50 PM	
03	Motion	No	Daniel Shin	9/11/2023 2:59 PM	9/11/2023 3:50 PM	
02	Notice of Appearance	No	Candace Ellerbe	9/8/2023 9:34 AM	9/11/2023 3:43 PM	
01	Notice of Appearance	No	Jimbo Crandall	9/8/2023 9:33 AM	9/11/2023 3:43 PM	

## Service List

The Service List is found below the Docket on the Dispute page.

Service List	
Service List	
Contact	Organization (Contact)
Grace Hickey	ITA

## Panelists

The Panelists list is found after the Service List on the Dispute page.

Panelists		
Contact	Role	BPI/Confidential
Symeon Hunter	Panelist	No

## Timeline

The Timeline is found below the Panelists on the Dispute page.

## Timeline

### Timeline

**10.12 Milestones**      **Due Date ↑**      **Modified On**      **Comments**

Request for Panel Review	8/17/2023	8/18/2023 7:24 AM	
Complaint	9/18/2023	8/18/2023 7:24 AM	
Notice of Appearance	10/2/2023	8/18/2023 7:24 AM	
Administrative Record	10/17/2023	8/18/2023 7:24 AM	
Complainant Brief	12/17/2023	8/18/2023 7:24 AM	
Response Brief	2/15/2024	8/18/2023 7:24 AM	
Reply Brief	3/3/2024	8/18/2023 7:24 AM	
Appendix to Brief	3/14/2024	8/18/2023 7:24 AM	
Oral Argument	4/3/2024	8/18/2023 7:24 AM	
Panel Decision	7/2/2024	8/18/2023 7:25 AM	

## My Filings

After logging into the system, **My Filings** is displayed if the user has file upload privileges granted. My Filings is a list of filings created by the user.


### My Filings

<div>Search </div>						
Dispute	Dispute Number	Agreement Type	Dispute Type	Filing Type	Filing Status	Filed On
<b>Candace Friday</b>	CDA-MEX-2023-10.12-04	USMCA	Article 10.12	Notice of Appearance	Pending for Review	9/8/2023 9:19 AM
<b>Candace Final Test</b>	USA-CDA-2023-10.12-15	USMCA	Article 10.12	Notice of Appearance	Pending for Review	9/8/2023 9:34 AM
<b>DEMO</b>	CDA-USA-2023-10.12-13	USMCA	Article 10.12	Appendix to the Briefs	Uploaded	9/8/2023 5:14 PM

## My Involved Disputes

**My Involved Disputes** is found below **My Filings**. This section allows you to quickly access disputes that you have uploaded a filing against or any disputes where you are part of the service, panelist or parties list. If you have not yet taken any of these actions, the My Involved Disputes section will be empty.

### My Involved Disputes

<div>Search </div>			
Dispute Name	Dispute Number	Agreement Type	Dispute Type
Candace Thursday	CDA-USA-2023-10.12-09	USMCA	Article 10.12
Candace Friday	CDA-MEX-2023-10.12-04	USMCA	Article 10.12
DEMO	CDA-USA-2023-10.12-13	USMCA	Article 10.12
Candace Final Test	USA-CDA-2023-10.12-15	USMCA	Article 10.12
SL AD 88	USA-CDA-2023-31-09	USMCA	Chapter 31
PENDING DISPUTE	CDA-MEX-2023-10.12-02	USMCA	Article 10.12
Widgets from Canada	U.S.-CDA-2023-10.12-14	USMCA	Article 10.12
Energy Safeguard Measure	U.S.-MEX-2023-31-03	USMCA	Chapter 31
chicken tendies	USA-CDA-2023-31-08	USMCA	Chapter 31

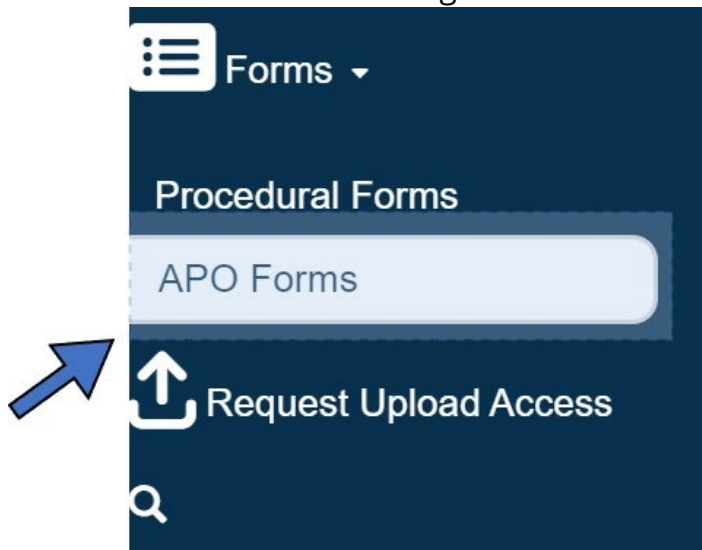
# Administrative Protective Order (APO) Application Submission

**Please note: This section applies to Administrative Protective Order applications to U.S. Investigating Authorities (ITC or DOC/ITA/E&C) only.**

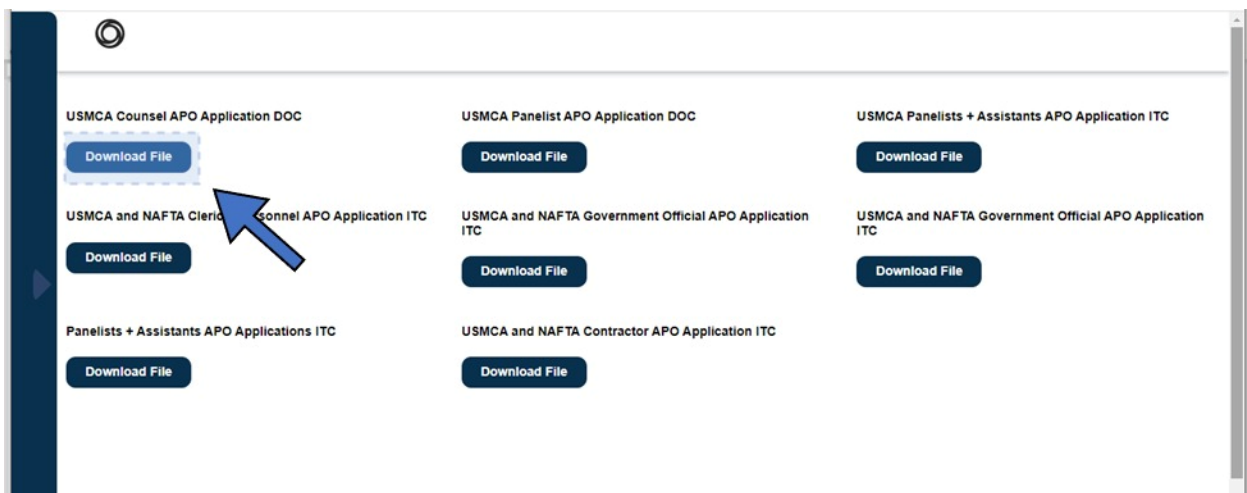
## Downloading and Completing APO Forms

Template APO forms (from the U.S. Investigating Authorities only) are available in the TAS E-filing System.

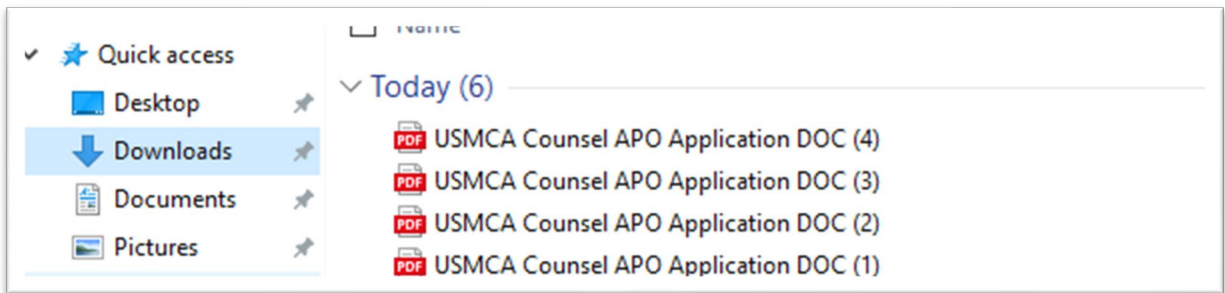
1. Click Forms from the left navigation menu and select **APO Forms** from the list.



2. Click **Download File** under the form you need. The selected form is downloaded immediately to your download location on your computer.



The downloaded files are shown below.

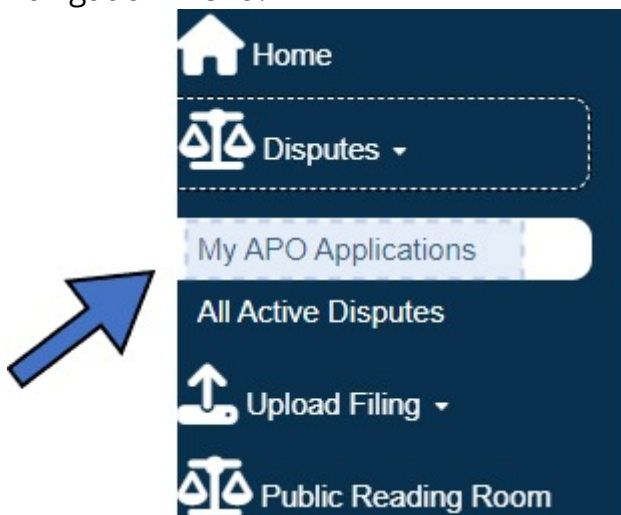
A screenshot of the Adobe Acrobat Pro DC interface. The title bar reads 'USMCA Counsel APO Application DOC.pdf - Adobe Acrobat Pro DC (32-bit)'. The menu bar includes File, Edit, View, E-Sign, Window, and Help. The toolbar shows various editing tools. The main content area displays a form titled 'United States Department of Commerce International Trade Administration Enforcement and Compliance'. Below the title, it says 'For counsel of record and other professionals.' The main heading of the form is 'PROTECTIVE ORDER APPLICATION FOR PROPRIETARY INFORMATION FOR BINATIONAL PANEL REVIEW UNDER ARTICLE 10.12 OF THE UNITED STATES-MEXICO-CANADA AGREEMENT (USMCA)'. The form includes several input fields: 'Trade' (with a line), 'Name of Panel Review' (with 'NAFTA' entered), 'Secretariat File No.' (with a line), and 'Application No.' (with a line). At the bottom left, there is a 'from' field with 'Tesla' entered and a 'Task View' button. The right sidebar shows the 'FORMAT' and 'OBJECTS' panels.

The forms can be completed on your computer using Adobe. Please note that the U.S. Department of Commerce/International Trade Administration/Enforcement & Compliance requires handwritten dates and signatures.

## Uploading and submitting an application: Two Options

To upload and submit an APO **to a U.S. Investigating Authority (ITC or DOC/ITA/E&C) only** complete the following steps:

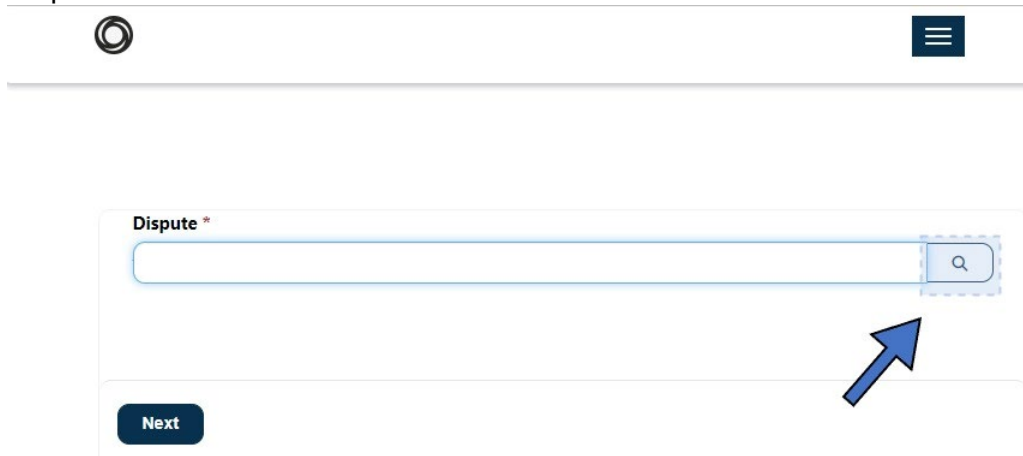
1. Select Disputes, and then select **My APO Applications** from the left navigation menu.



2. Click **Upload APO Application**.

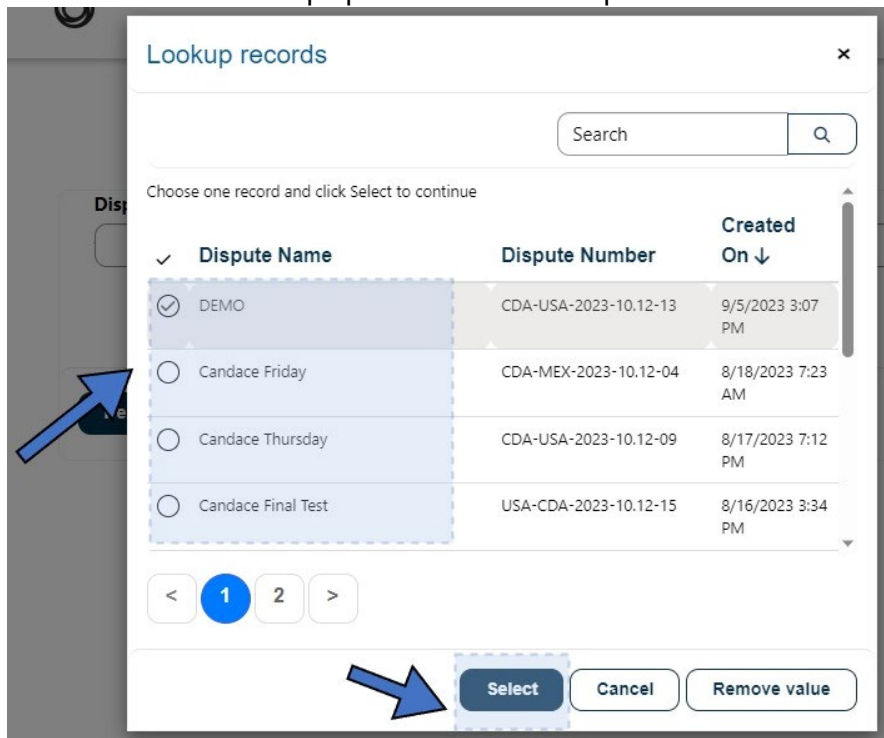


- Click the magnifying glass in the Dispute field to look up the applicable dispute.



The screenshot shows a form with a field labeled "Dispute \*". To the right of the text input is a magnifying glass icon inside a square button. A blue arrow points to this icon. Below the field is a dark blue button labeled "Next".

- Select the radio button beside the applicable dispute and then click **Select**. The selected choice populates in the Dispute field.



The screenshot shows a "Lookup records" dialog box. It has a search bar at the top. Below the search bar is a table with the following data:

✓ Dispute Name	Dispute Number	Created On ↓
<input checked="" type="radio"/> DEMO	CDA-USA-2023-10.12-13	9/5/2023 3:07 PM
<input type="radio"/> Candace Friday	CDA-MEX-2023-10.12-04	8/18/2023 7:23 AM
<input type="radio"/> Candace Thursday	CDA-USA-2023-10.12-09	8/17/2023 7:12 PM
<input type="radio"/> Candace Final Test	USA-CDA-2023-10.12-15	8/16/2023 3:34 PM

At the bottom of the dialog, there are three buttons: "Select", "Cancel", and "Remove value". A blue arrow points to the "Select" button. To the left of the "Select" button is a pagination control showing "1" in a blue circle, with "<" and ">" buttons on either side.



5. Click **Next**. The **APO File Type** field displays in the next step.



Dispute \*

DEMO

Next

6. Select the **APO File Type** from the drop-down menu:

- Initial
- Amendment
- Certificate of Destruction



Dispute

DEMO

APO File Type \*

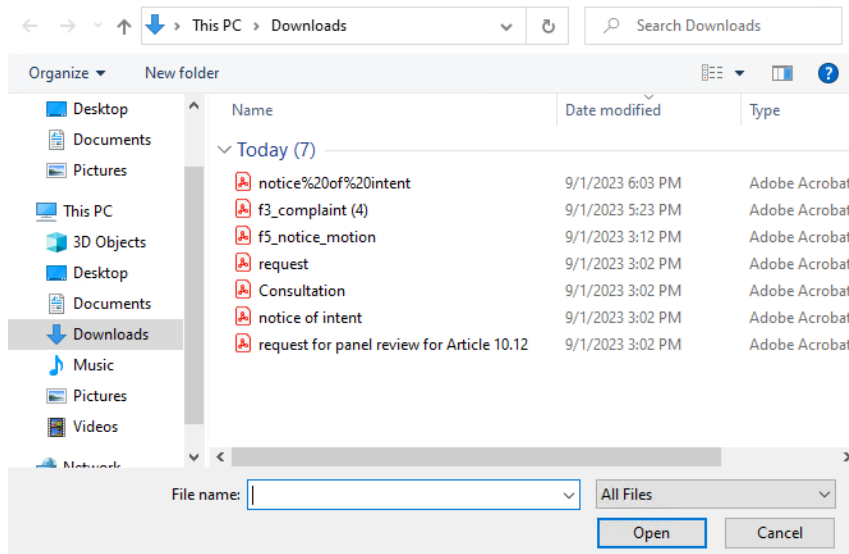
Initial Application

APO Application \*

Choose File No file selected

Previous Submit

7. Click **Choose File** to select the applicable file from your computer.
8. Select the applicable file, then click the **Open** button.

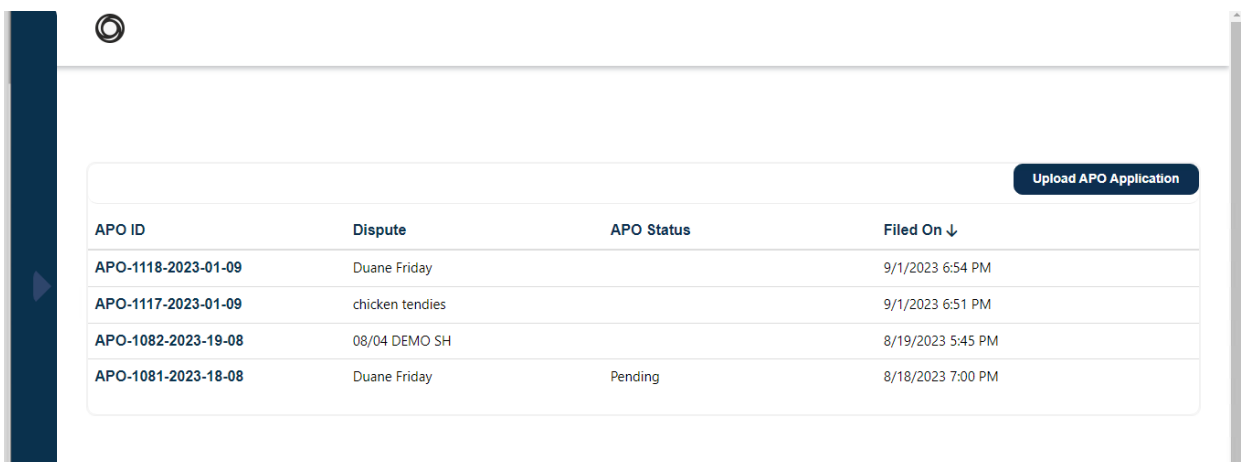


9. Click the **Submit** button. You will receive a *Submission Completed Successfully* message. Your application is now in **Pending** status on your **My APO Applications** page.

Submission completed successfully.

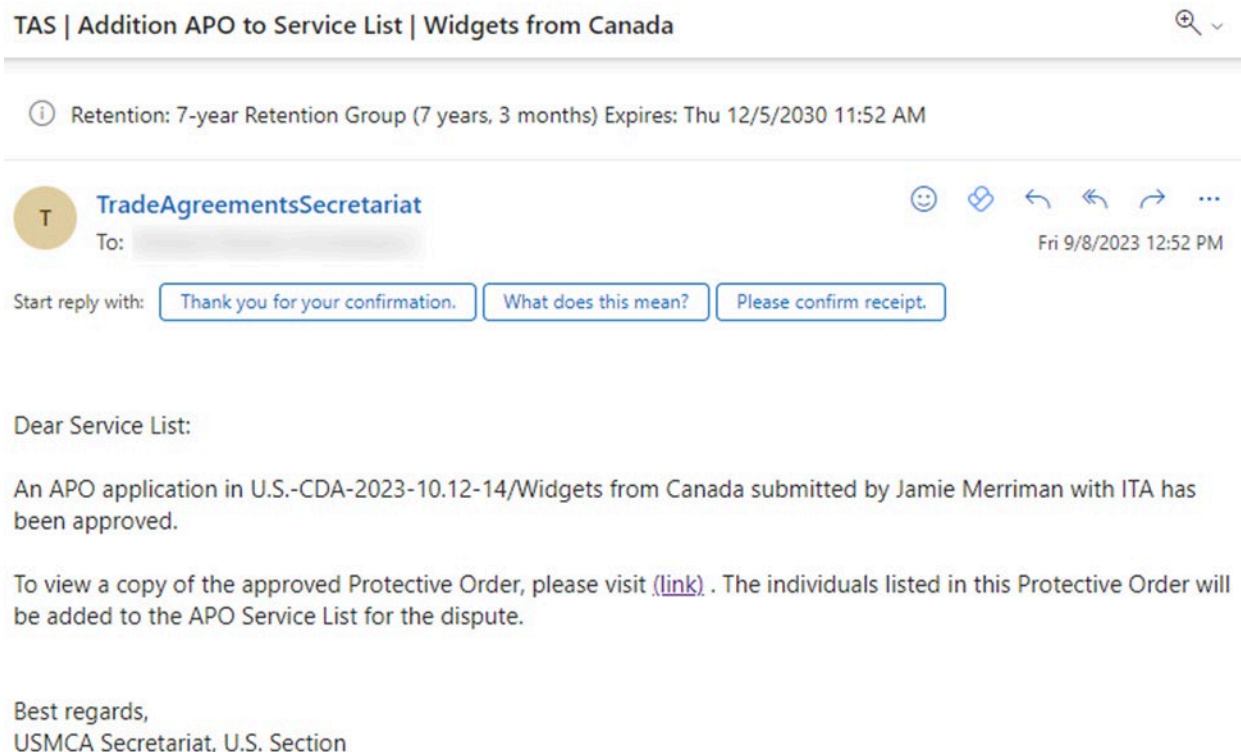
**My APO Applications** shows the new application in **Pending** status. You will receive an automated notification email indicating your APO application has been

received and will be reviewed by the Investigating Authority. In addition, the relevant Service List will be notified that an APO application has been submitted.

A screenshot of a web application interface. On the left is a dark blue vertical sidebar with a play button icon. The main area has a white background. At the top right is a dark blue button labeled 'Upload APO Application'. Below it is a table with four columns: 'APO ID', 'Dispute', 'APO Status', and 'Filed On ↓'. The table contains four rows of data. The first three rows have 'Pending' status, while the fourth row has 'Pending' status.

APO ID	Dispute	APO Status	Filed On ↓
APO-1118-2023-01-09	Duane Friday	Pending	9/1/2023 6:54 PM
APO-1117-2023-01-09	chicken tendies	Pending	9/1/2023 6:51 PM
APO-1082-2023-19-08	08/04 DEMO SH	Pending	8/19/2023 5:45 PM
APO-1081-2023-18-08	Duane Friday	Pending	8/18/2023 7:00 PM

Once the APO application is approved, the user and the Service List will receive an email notification of approval. **Note:** *If a user does not have an affiliation with an organization in their Profile, their organization will not appear in the email.*

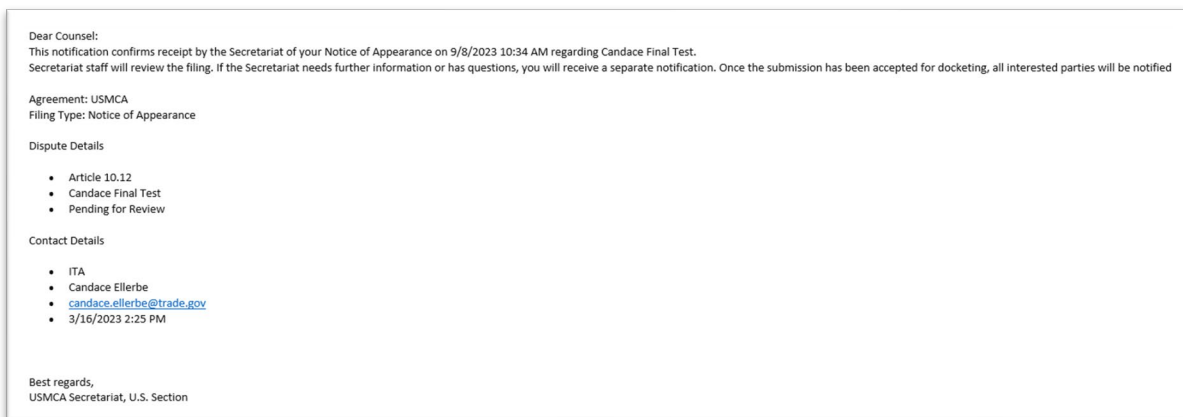
A screenshot of an email notification. The header shows 'TAS | Addition APO to Service List | Widgets from Canada' on the left and a search icon on the right. Below the header is a retention notice: 'Retention: 7-year Retention Group (7 years, 3 months) Expires: Thu 12/5/2030 11:52 AM'. The email body starts with a header from 'TradeAgreementsSecretariat' with a yellow circular icon containing the letter 'T'. Below this is a 'To:' field with a blurred email address. To the right of the header are icons for smiley face, lock, reply, reply all, and more options. The date 'Fri 9/8/2023 12:52 PM' is on the right. Below the header is a 'Start reply with:' section with three buttons: 'Thank you for your confirmation.', 'What does this mean?', and 'Please confirm receipt.'. The main body of the email starts with 'Dear Service List:' followed by a paragraph: 'An APO application in U.S.-CDA-2023-10.12-14/Widgets from Canada submitted by Jamie Merriman with ITA has been approved.' Then another paragraph: 'To view a copy of the approved Protective Order, please visit (link) . The individuals listed in this Protective Order will be added to the APO Service List for the dispute.' Finally, it ends with 'Best regards, USMCA Secretariat, U.S. Section'.

## Automated Notification with Prepopulated Application once a Notice of Appearance is Submitted

If you upload a Notice of Appearance to a Dispute where the U.S. Section is the Responsible Office, you will automatically receive an email with a prepopulated APO application form with a link to upload it.

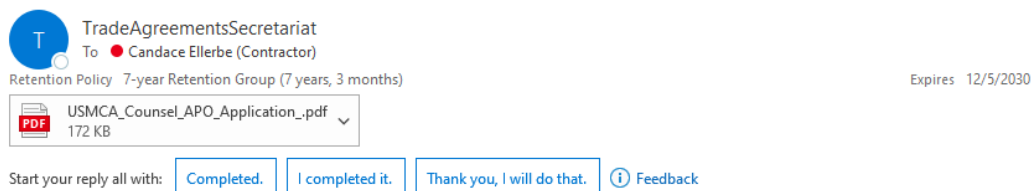
[\(Click here to view the process of uploading a Filing, such as a Notice of Appearance, to a Dispute\)](#)

Once the Notice of Appearance is submitted, the end user will receive a confirmation email, and the Service List will be notified.



The end user will subsequently receive an email indicating that the user can fill out an APO application if desired. The following image shows an example of the email to complete an attached APO application.

### APO Application



Please fill out this APO application and use the "Upload APO Application" from the link below. The appropriate investigating authority will be notified and take action.

[Click Here To Upload](#)

## Submitting an APO Application

Once the APO application is submitted, the Investigating Authority can *Accept* the application and the end user will receive a confirmation email.

Dear Candace Ellerbe:

An APO application in CDA-MEX-2023-10.12-04 submitted by has been approved.

To view a copy of the approved Protective Order, please visit [\[link\]](#) . The individuals listed in this Protective Order will be added to the APO Service List for the dispute.

Best regards,  
CUSMA Secretariat, Canadian Section

If the APO application is *Not Accepted with Comments* by the Investigating Authority, the end user will receive an email with a reason.

Dear 3:

Your APO application in Candace Final Test / USA-CDA-2023-10.12-15 has been returned for the following reason(s):

Testing the feature

Should you need further clarification, please contact [tasdevsecretariat@itaisinternationaltrade.onmicrosoft.com](mailto:tasdevsecretariat@itaisinternationaltrade.onmicrosoft.com) {IA'sOfficePhone}. You can submit a new APO application address the reasons via the TAS E-Filing System.

Best regards,  
USMCA Secretariat, U.S. Section

## Excel to PDF conversion

The new TAS E-filing System allows users to upload files in different formats, including Excel. While the original file format will be available, the System must also convert Excel files to PDF in order to place a watermark on the document during the docketing process. Making a few changes to your Excel files will improve their convertibility to PDF.

### Initial Changes

The following changes are recommended:

- **Word Wrapping**

Columns which contain cell data with long sentence structures are recommended to be word wrapped and the column width extended to improve readability.

- **Borders**

Borders can improve readability since the pdf conversion will not autogenerate borders. Printing Gridlines is an alternative option as well, but some formatting may overlap the gridlines.

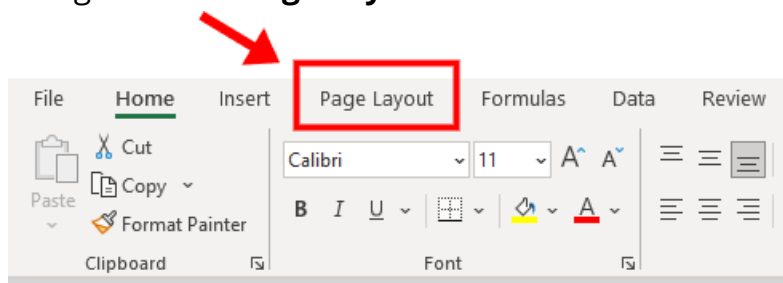
- **Text Size**

Aside from headings or cells with specific styling, a consistent text size is recommended throughout the document sheets.

### Page Formatting

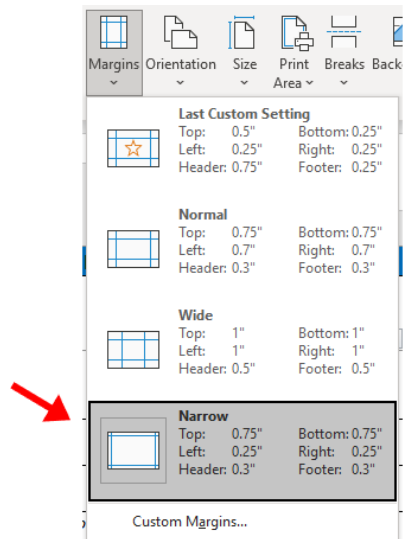
These next steps will set up the document for PDF conversion. These changes are required for every sheet within the document.

- 1) Navigate to the **Page Layout** Tab.

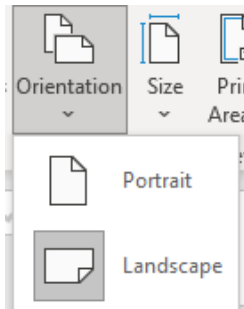


- 2) Set **Margins** to Narrow. This will still allow headers and footers or titles in the conversion. Smaller margins can be utilized but may cut off elements such as

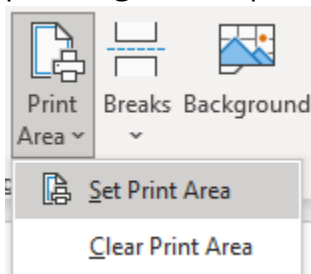
headers/footers.



- 3) For **Orientation**, if the width of the spreadsheet is crossing more than halfway of a 16:9 screen on 100% zoom, then it is recommended to use *Landscape* for the sheet. Otherwise, *Portrait* should be fine for most cases.

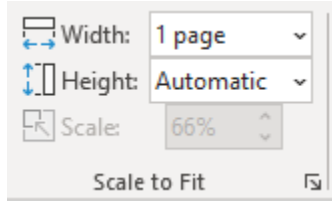


- 4) (Optional) Set the **Print Area** if there are cells outside of the sheet that are not required in the conversion. Pre-selecting the cells is required before pressing the set print area button.



- 5) To make sure that all columns are within one page, modify the **Scale to Fit** settings. Width should be one page, and the Height to Automatic. Scale will

grey out and automatically adjust to fit the columns into a single page.



6) The Document is now ready for PDF Conversion!

### Additional Considerations

- Set your zoom to at least 60%, and preferably 100%. Depending on the width of the sheet, if readability is required for a converted PDF that is scaled to fit the window, then anything below 60% may be difficult to read on some screens. 100% zoom will always be readable.
  - Certain devices may not show the scale percentage, so testing may be needed. One way to view what the pdf will look like is the using the Print preview of the sheet.
- If a row needs to be repeated, this setting can be changed in **Page Setup>Sheet** under Rows to repeat at top.

