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

Updated January 2024
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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. This allows the Responsible Office to contact you in case any corrections are needed before close of business.

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.

Once the Secretariat has docketed a filing, the TAS E-filing System will send an email notification to the filer and service list of the USCMA proceeding noting the docketing of the filing. This email notification satisfies the service requirements of the filer and TAS. Please note that Notice of Intent to Commence Judicial Review and Request for Consultation filings are not served by the TAS E-filing System. Therefore, service other than by means of the TAS E-filing System is required, and as such, the filer should consult the applicable Rules of Procedure.

In case of technical issues with the TAS E-filing System please contact the Responsible Office as soon as possible.
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://tasefiling.gov

2. Select the **Sign up Now** link below the blue Sign in button.
3. Enter your email address, click **Send Verification Code**.

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.

[Image of verification code input field]

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

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

[Diagram of user details input fields]
User Agreement

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.
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**.

Profile

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**

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rich</td>
<td>Almario</td>
</tr>
</tbody>
</table>

**E-mail**

richard.almario@trade.gov

**Business Phone**

Provide a telephone number

**Country**

Organization

**Preferred Language**

English

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

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

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

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

![Public Reading Room option](image)

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

<table>
<thead>
<tr>
<th>Dispute Name</th>
<th>Dispute Number</th>
<th>Agreement Type</th>
<th>Dispute Type</th>
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<td>CDA-MEX-2023-10.12-02</td>
<td>USMCA</td>
<td>Article 10.12</td>
</tr>
</tbody>
</table>

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

Complete the steps below if the Access Type is Dispute.
3. Click the **magnifying glass** in the Dispute field to select the Dispute.
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**

<table>
<thead>
<tr>
<th>Dispute Name</th>
<th>Dispute Number</th>
<th>Cre</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEMO</td>
<td>CDA-USA-2023-10.12-13</td>
<td>9/15</td>
</tr>
<tr>
<td>Candace Friday</td>
<td>CDA-MEX-2023-10.12-04</td>
<td>8/18</td>
</tr>
<tr>
<td>Candace Thursday</td>
<td>CDA-USA-2023-10.12-09</td>
<td>8/17</td>
</tr>
<tr>
<td>Candace Final Test</td>
<td>USA-CDA-2023-10.12-15</td>
<td>8/16</td>
</tr>
<tr>
<td>SL AD 88</td>
<td>USA-CDA-2023-10.12-06</td>
<td>8/15</td>
</tr>
<tr>
<td>SL AD 7</td>
<td>CDA-USA-2023-31.09</td>
<td>8/15</td>
</tr>
<tr>
<td>chicken tendies</td>
<td>USA-CDA-2023-31.06</td>
<td>8/15</td>
</tr>
</tbody>
</table>

5. **Why is Access needed?** Briefly explain why you need upload access in the text field.
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.
2. Select the applicable Investigating Authority from the drop-down menu.

3. Click the **Submit** button.
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.

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In case of technical issues with the TAS E-filing System please contact the Responsible Office as soon as possible.
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.

COMPLAINT

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

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

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

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

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

The Filing Type field populates with Request for Panel Review.

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

7. Click the **Next Button**.
8. Click **Add Files**. The files from your computer display.
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.
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.
8. Click the **Submit** button.

The “Submission completed successfully” message will display.
Uploading a Chapter 31 Request for Consultation or Third Party Notification

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.

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

3. Then select Request for Consultation or Third Party Notification for Participation by clicking the arrow in the File Type field.
4. Click **Next**.

5. After the screen loads, click **Add Files**.

6. Select the applicable file(s) from your computer.
7. Click the **Open** button to finish adding files.
8. Click **Upload**. A *File(s) upload successfully* message displays.

9. Click the **Submit** button.

10. *Submission completed successfully* displays and your document will be transmitted to the relevant Secretariat.
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
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
4. Select the **Involved Office** from the drop-down menu:
   - CUSMA Secretariat, Canada Section
   - TMEC Secretariat, Mexican Section
   - USMCA Secretariat, U. S. Section

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

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

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

9. Select the files from your computer. Then Click the **Open** button.
11. Click **Upload**. A *File(s) upload successfully* message displays.

12. Click **Submit**.
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.
**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.
Case Docket

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

<table>
<thead>
<tr>
<th>Filing Number</th>
<th>Filing Type</th>
<th>BPI/Confidential</th>
<th>Filed By</th>
<th>Filed On</th>
<th>Docketed On</th>
</tr>
</thead>
<tbody>
<tr>
<td>03</td>
<td>Motion</td>
<td>No</td>
<td>Daniel Shin</td>
<td>9/11/2023 2:59 PM</td>
<td>9/11/2023 3:50 PM</td>
</tr>
</tbody>
</table>
Service List

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

Panelists

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

Timeline

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

**Timeline**

<table>
<thead>
<tr>
<th>10.12 Milestones</th>
<th>Due Date</th>
<th>Modified On</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Panel Review</td>
<td>8/17/2023</td>
<td>8/18/2023 7:24 AM</td>
</tr>
<tr>
<td>Complaint</td>
<td>9/18/2023</td>
<td>8/18/2023 7:24 AM</td>
</tr>
<tr>
<td>Notice of Appearance</td>
<td>10/2/2023</td>
<td>8/18/2023 7:24 AM</td>
</tr>
<tr>
<td>Administrative Record</td>
<td>10/17/2023</td>
<td>8/18/2023 7:24 AM</td>
</tr>
<tr>
<td>Complainant Brief</td>
<td>12/17/2023</td>
<td>8/18/2023 7:24 AM</td>
</tr>
<tr>
<td>Response Brief</td>
<td>2/15/2024</td>
<td>8/18/2023 7:24 AM</td>
</tr>
<tr>
<td>Reply Brief</td>
<td>3/3/2024</td>
<td>8/18/2023 7:24 AM</td>
</tr>
<tr>
<td>Appendix to Brief</td>
<td>3/14/2024</td>
<td>8/18/2023 7:24 AM</td>
</tr>
<tr>
<td>Panel Decision</td>
<td>7/2/2024</td>
<td>8/18/2023 7:25 AM</td>
</tr>
</tbody>
</table>

**My Filings**

<table>
<thead>
<tr>
<th>Dispute</th>
<th>Dispute Number</th>
<th>Agreement Type</th>
<th>Dispute Type</th>
<th>Filing Type</th>
<th>Filing Status</th>
<th>Filed On</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEMO</td>
<td>CDA-USA-2023-10.12-13</td>
<td>USMCA</td>
<td>Article 10.12</td>
<td>Appendix to the Briefs</td>
<td>Uploaded</td>
<td>9/8/2023 5:14 PM</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Dispute Name</th>
<th>Dispute Number</th>
<th>Agreement Type</th>
<th>Dispute Type</th>
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<tr>
<td>Energy Safeguard Measure</td>
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<td>USMCA</td>
<td>Chapter 31</td>
</tr>
<tr>
<td>chicken tendies</td>
<td>USA-CDA-2023-31-08</td>
<td>USMCA</td>
<td>Chapter 31</td>
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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.

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

4. Select the radio button beside the applicable dispute and then click **Select**. The selected choice populates in the Dispute field.
5. Click **Next**. The **APO File Type** field displays in the next step.

6. Select the **APO File Type** from the drop-down menu:
   - Initial
   - Amendment
   - Certificate of Destruction

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.

**My APO Applications** shows the new application in **Pending** status. The filer and the Service List will receive an automated notification email indicating the APO application has been received and will be reviewed by the Investigating Authority. In
addition, when the protective order is issued, the TAS E-filing System will send a notification to the applicant and the Service List of the USCMA proceeding. This email notification satisfies the service requirements of the filer and TAS.

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.
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 including a template APO application that the user can complete if needed. The following image shows an example of the email to complete an attached APO application:
APO Application

TradeAgreementsSecretariat

To: Jamie Meniman (Federal)

Retention Policy: 7-year Retention Group (7 years, 3 months) Expires 4/8/2031

Start your reply all with: Please confirm receipt. Here is the information. Completed. Feedback

Thank you for submitting a Notice of Appearance through the TAS E-filing System. If you need to complete an application for an Administrative Protective Order (APO) in this dispute, please fill out the attached APO application template. Then use the link below and click on the "Upload APO Application" button to upload your application to the System. 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:

**TAS | Approved APO | TEST Dispute**

![Image of email with details]

Dear Jamie Merriman:

An APO application in USA-CDA-2023-10.12-01/TEST Dispute submitted by Jamie Merriman with ITA 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,
USMCA Secretariat, U.S. Section

If the APO application is **Not Accepted with Comments** by the Investigating Authority, the end user will receive an email providing an explanation. The user can then submit a new APO application.
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.