The Coordinated Interagency Transmission Authorizations and Permits (CITAP) Program Portal

User Guide for Project Proponents

CITAP User Guide for Project Proponents
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Grid Deployment Office
United States Department of Energy
Washington, D.C. 20585

CITAP Project Proponent User Guide

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Part 1: CITAP Portal Overview

System Requirements

- All CITAP Portal users must have a OneID account (see Part 2 section for step-by-step instructions).
- Recommended browsers: Firefox, Chrome, Edge, and Safari.
- An asterisk (*) indicates a required field or attachment. Leaving a required field or attachment incomplete will generate a red outline or red alert indicator, as shown in the example images. below.
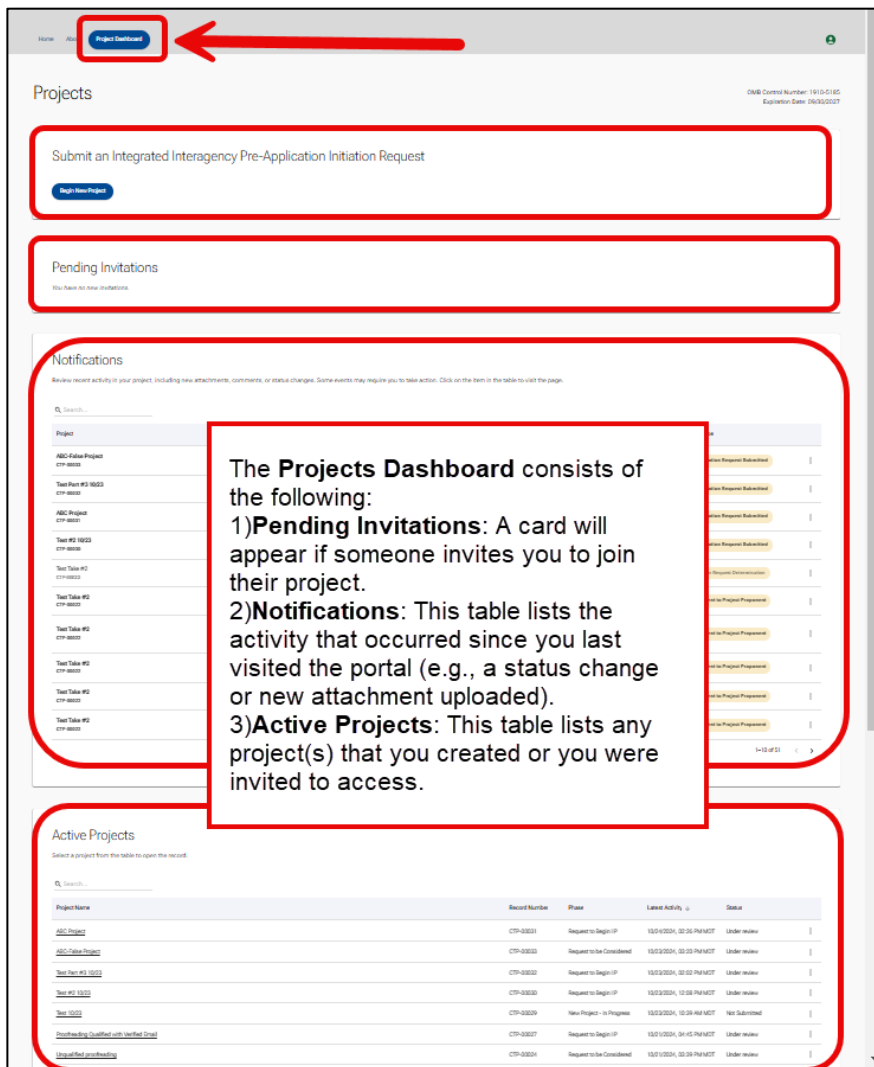
Image 1: Incomplete Fields

Orientation to Site

- ***Sign In/Sign Out*** buttons are located in upper right corner.
- Use the **Profile** page to revise how your name and organization are shown on the site, and to set and edit the email address for notifications.
- Returning CITAP Portal users can click the **Project Dashboard** tab to view your project(s).
  - Each project is listed with a unique **Record Number**.
  - Use the **Notifications** table to review the activity in your project since you last logged in.

Image 2: Project Dashboard

The **Projects Dashboard** consists of the following:

1) **Pending Invitations**: A card will appear if someone invites you to join their project.

2) **Notifications**: This table lists the activity that occurred since you last visited the portal (e.g., a status change or new attachment uploaded).

3) **Active Projects**: This table lists any project(s) that you created or you were invited to access.

Uploading Attachments

In the CITAP Portal, the project proponent communicates to the DOE representative by attaching files to the record.

- Use *Select File* to locate and select a file or drag and drop into the *Select File* area. (NOTE: Upload one attachment at a time.)
  - NOTE: When attaching files (revised or multiple), the filenames must not be the same to keep them separate; otherwise, an error appears "*A file with that name already exists*" and cannot be uploaded.
- Use the *+ Add Attachment* then *Upload* buttons to upload documents one at a time (see image 3).
- Use the *Description* field to provide a detailed description of the document for your reviewer. *Description* allows up to 25 characters. When uploading a long document, use the *Description* field to note the page number(s) where the reviewer will find the relevant information.
- If a document is uploaded with an error, upload a corrected version. Call the file "Revised" in the *Description* along with an explanatory note (see image 4).
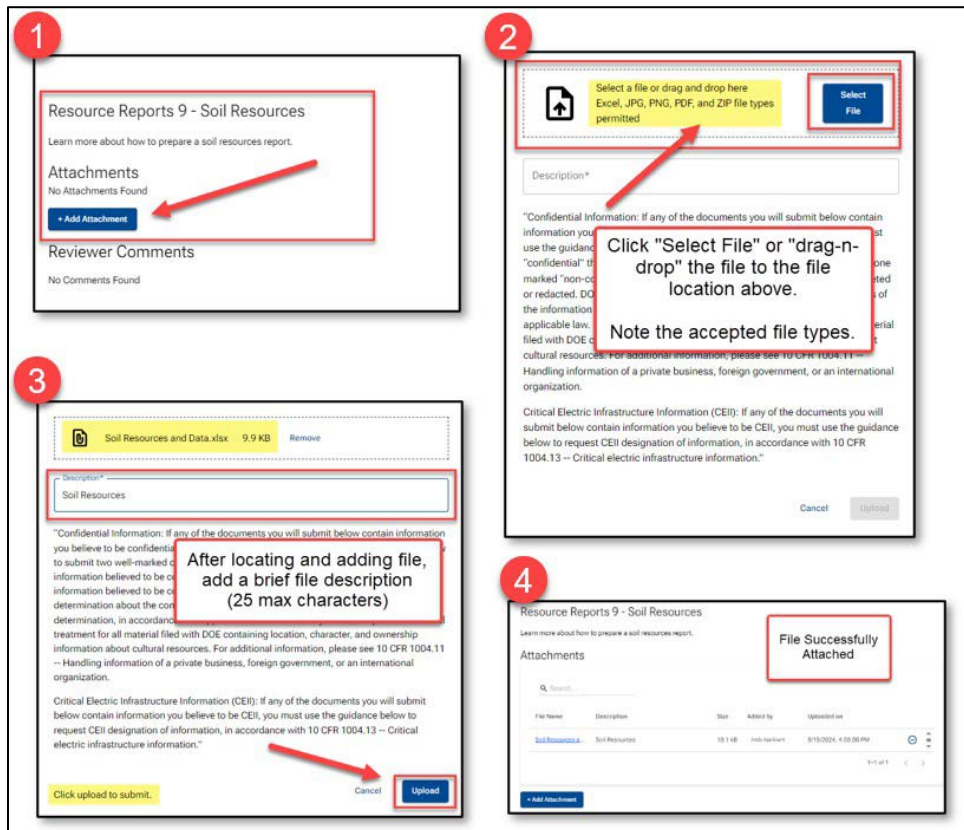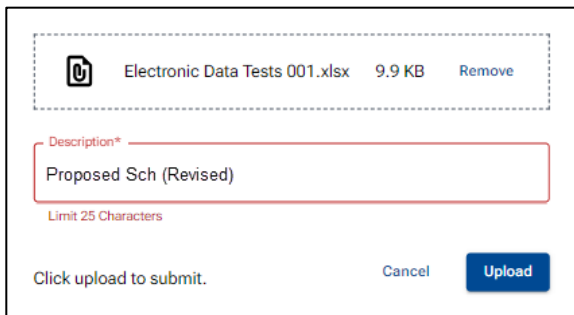
Image 3: Add Attachments

Accepted File Types

Upload attachments in the following formats:

- MS Excel
- Adobe PDF
- JPG
- PNG
- ZIP

There is no restriction on file size.

Editing Submitted Materials

Project proponents may wish to edit information submitted to the portal. Make this request through the portal through the steps below. Alternately, you can email your primary reviewer or citap@hq.doe.gov directly and explain the change you wish to make.

NOTE: All changes are a "request" for the change since your primary reviewer will review and accept the change.

1. **Remove an Attachment:** Click on the 3-dot icon located on the right end of the attachment row (see image 5). Selecting ***Request to Remove Attachment*** will prompt a pop-up confirmation window. You must provide a reason for making the change, then click the ***Request to Remove*** button (see image 6).
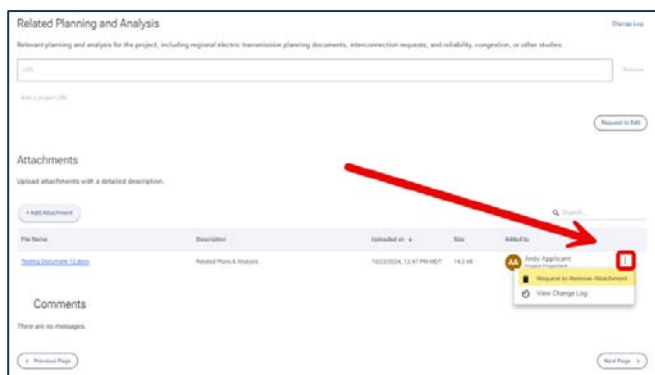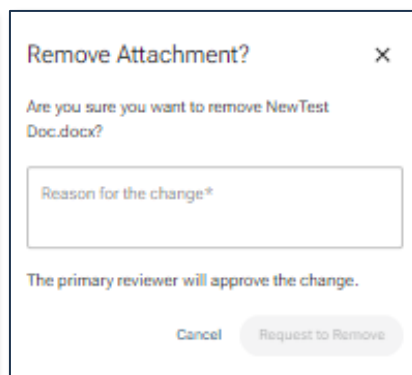
Image 5: Remove Attachment   *Image 6: Fill in the reason for the change before submitting the request.*
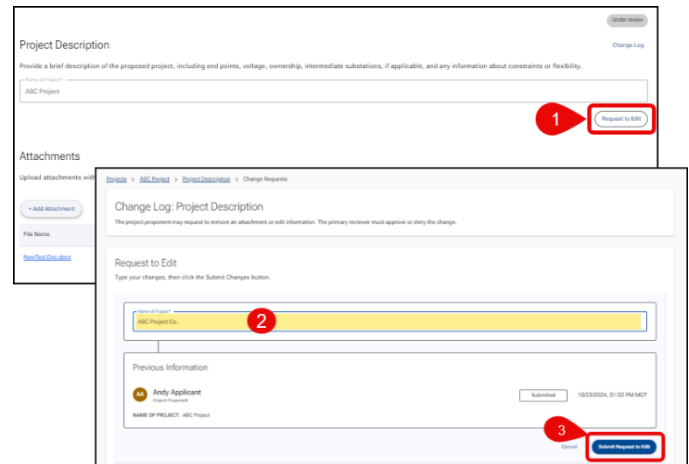
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2. **Editing Information:** Open the page containing the field to be modified, then click the *Request to Edit* button located near the field. This action opens the Change Log where you can retype the information. Click the *Submit Request to Edit* button to confirm and submit (see image 7).

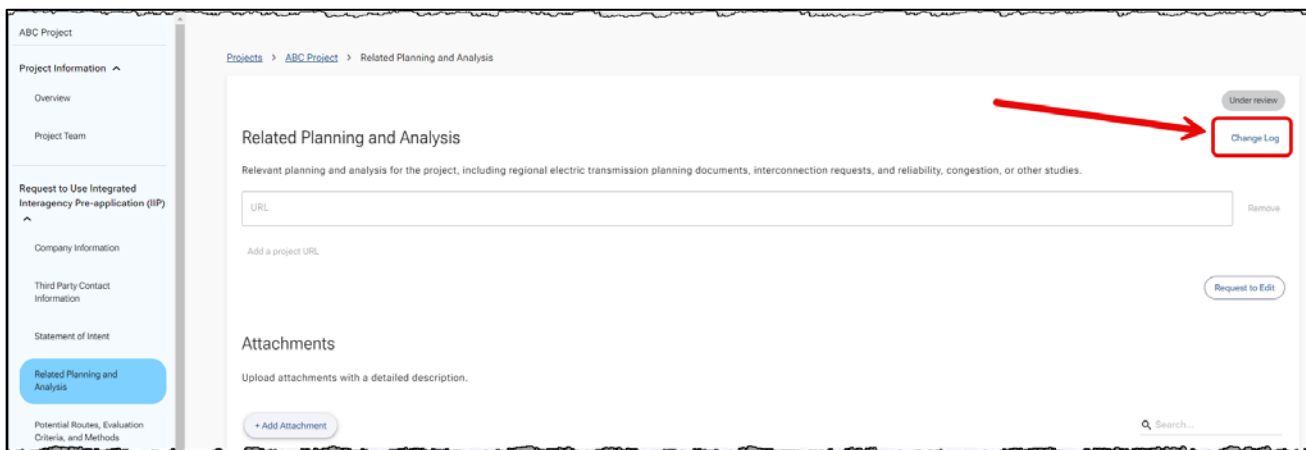> (NOTE: This only applies to the few pages with fillable fields.)

The request will be shown as **Pending,** until the DOE reviewer approves the change. Only then will you see the update on the main page.

To view all requested changes, click on the **Change Log** button located in the upper right corner of each page (see image 8).

From the **Change Log** you can check if your request is still pending and review previous changes. You can also choose to cancel a requested change (see image 9).

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Communication with DOE

Correspondence with your primary reviewer is critical for meeting the CITAP Program timeline. There are a few different means of communication:

Direct Communication

- Users can write to the DOE using the email citap@hq.doe.gov or directly email the primary reviewer assigned to the project.
- Include the project's Record Number in all emails.

Portal Comments

- The DOE reviewer will leave comments with instructions and information. The comments section appears on each page with attachments.
- Project proponents may not write a comment, you may respond by uploading an attachment.
- Each comment will include a status indicator.

Image 10: Reviewers will leave comments to the Project Proponent within the CITAP Portal.

Notification Emails

- Portal users will receive email notifications to alert them of activity on their project, for example, a reviewer left a comment or the status has been updated.

- The table on the Project Dashboard page lists all the notifications. Click any row of the table to go to that page, as shown in image 11 below.

- IMPORTANT: Project proponents will not receive these notifications until their email address is verified.

- The notification emails will only contain information on your project and are critical to participating in CITAP. If you select "unsubscribe" from the email footer, *you will no longer be able to open your project record in the portal.*

Image 11: Notifications section

Completing Your Profile

During your first time logging in, you'll be prompted to complete your profile with information, such as your full name (as you'd like it to appear on the site) your organization. If you have not verified your email, you will also be prompted to finish that process before you are able to open the project (see image 12.)

Image 12: Profile Incomplete Prompt
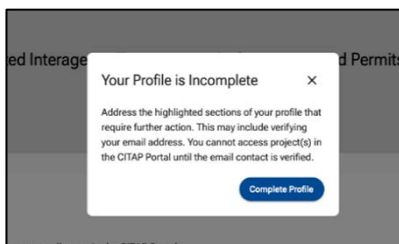
Accepting an Invitation

There are two ways to join a project record: Either by creating the project yourself, or by accepting an invitation to join a project.

1) You will receive an email from CITAP Portal (noreply@citap.gov)
2) Click the button in the email to open the webpage.
3) Log in to the CITAP Portal (for existing OneID accountholder)
   a. **Directions for creating new OneID users:** In the OneID pop-up window, choose ***Create an account*** and complete account information accordingly. For account creation instructions, see the user guide from Login.gov (https://www.login.gov/help/get-started/create-your-account/.
4) You will see a ***Pending Invitation*** with the project details. Click ***Accept***.
5) In the pop-up window, enter your preferred email address for notifications from the CITAP Portal. It can be different from the email address you use to login to the portal. (See image 13)

Image 13: Preferred Email Address Prompt
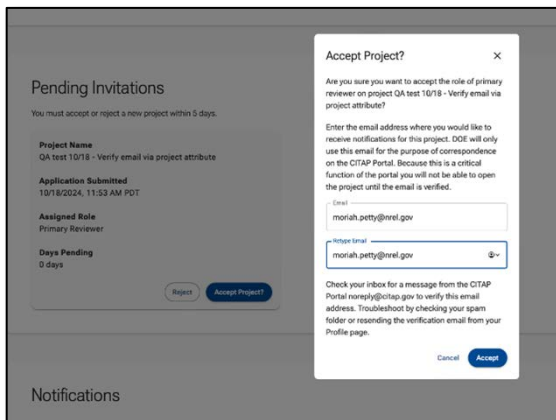
6) Check your email inbox for a message from CITAP Portal and verify your email.
7) You can now log into the CITAP Portal and access your projects under "Active Projects" in the Project Dashboard.

Verifying Your Email

Check your inbox for a message from CITAP Portal from noreply@citap.gov. It may be in your Spam/Junk folder.

When you click the button in the email, it will open a web browser to the CITAP Portal page. If you are not logged in, you will need to sign-in with your OneID credentials.

Once logged in, you will see the confirmation page (see image 14).

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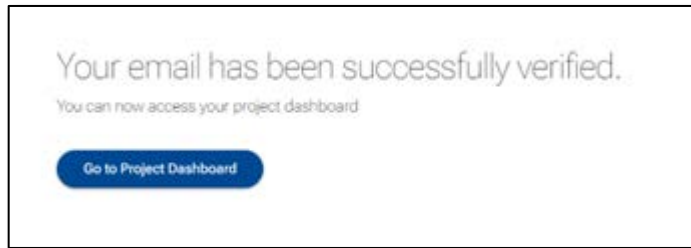
Troubleshooting Tips:

- The table will read **"Invite Pending"** until the email is verified.
- Review the email you typed into the field to ensure the spelling is correct.
- Click the button *Resend Verification Email*, if you don't see the message from CITAP in your inbox (see image 15 below).
- Emails only need to be verified one time. If you begin a new project with the same email address for notifications, you will not need to re-verify.

Image 15: Notification Settings

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Changing Your Email Address

To change an email address, go to the CITAP homepage and click on your **Profile** icon in the upper right corner, then select **Profile and Settings** from the drop-down menu.

Locate the **Notification Settings** section and the email address to modify. Type in the new email address and click *Save* (see image 16.)

Image 16: Changin Your Email Address

Status Indicators

Status indicators are used throughout the portal to help users track their project and provide additional information as needed (e.g., uploading a revised document).

- o **Under review** – Materials have been submitted and are under review by DOE and/or other agencies. This applies to information submittals, meeting requests, and materials such as resource reports.
- o **Meets requirements** – The project proponent can proceed to the next step. This applies to various steps, including eligibility for the IIP Process, meeting requests and materials such as resource reports.
- o **Does not meet requirements** – The project is not eligible to use the IIP Process, based on the information provided.
- o **Deficient (Needs additional information)** – DOE will provide a justification, and the project proponent can provide revised documents that address DOE's concerns for review.

Image 17: Status indicators
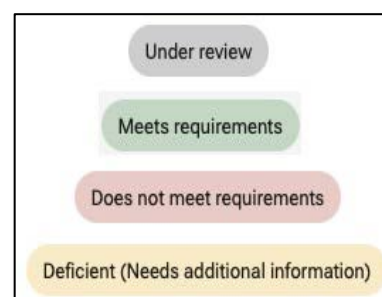
Managing Your Project Team

The individual who submits the initial request to use the IIP process is the only user automatically included in the project record. New contacts can be invited to the project record at any time and there is no limit to the number of contacts.

- Open the project from the **Project Dashboard**.
- Using the left navigation panel, select *Project Team*.
- Type in the contact's email address in the blank field and click *Invite* (see image 19). This will send email to the contact inviting them to create a profile in the CITAP Portal and access the project record.
  - o By refreshing the browser window, you will see the invitee listed on the table of Team Members with the yellow status indicator, **User Invite Pending**. (See image 18)
  - o The contact must open the invitation email and click the *Accept Invitation* button to verify acceptance.

Image 18: Status Indicators
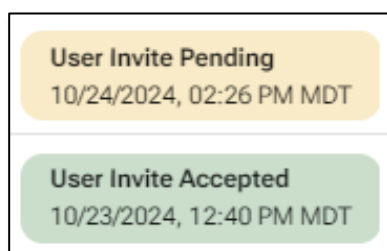
- Once the user accepts the invitation, the status on the table will update to **User Invite Accepted** and turn a green status color.

- NOTE: Contacts will not be able to access the project information until they accept the invitation.
- To **remove** a contact, locate the user on the Project Team Members table, and on the far right side is a 3-dot icon (see image 19.) Select that icon and click ***Remove user***. When a confirmation pop-up window appears, click ***Remove User*** button to save and remove that contact from the project. Project proponents are only able to remove other proponents, not the admin or reviewers.

Image 19: Manage Project Members

Confidential and Sensitive Information

Confidential Information: If any of the documents you submit contain information you believe to be confidential and exempt from disclosure, you must use the guidance linked below to submit two well-marked copies, one marked "confidential" that includes all the information believed to be confidential, and one marked "non-confidential" with the information believed to be confidential deleted or redacted. DOE will make its own determination about the confidential status of the information and treat it according to its determination, in accordance with applicable law. Please note you must request confidential treatment for all material filed with DOE containing location, character, and ownership information about cultural resources. For additional information, please see 10 CFR 1004.11 -- Handling information of a private business, foreign government, or an international organization.

Critical Electric Infrastructure Information (CEII): If any of the documents you submit contain information you believe to be CEII, you must use the guidance linked below to request CEII designation of information, in accordance with 10 CFR 1004.13 -- Critical electric infrastructure information.

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Part 2: Step-by-Step Instructions

Sign In

All CITAP Portal users **must** have a **OneID** account. You will be prompted to create a new account if you do not have OneID credentials.

1. Select the *Sign In* button on the CITAP Portal home page (image 20) to begin.
2. Agree to the *DOE Unauthorized Use* agreement (image 21) to continue.
3. Login using existing credentials or create a new account at the Login.Gov prompt:
   a) **New users:** In the pop-up *Login.Gov* window (image 22), choose *Create an account* and complete account information accordingly. For account creation instructions, see user guide: *https://www.login.gov/help/get-started/create-your-account/*.

   - **IMPORTANT**: This email is only used to securely confirm your identity and login to the CITAP Portal. You will choose a preferred email for notifications and the CITAP correspondence when you create your Profile.
   b) **Existing Account Holders:** In the pop-up window (image 22), choose *Sign in*. Use your pre-established credentials.

Image 20: CITAP homepage
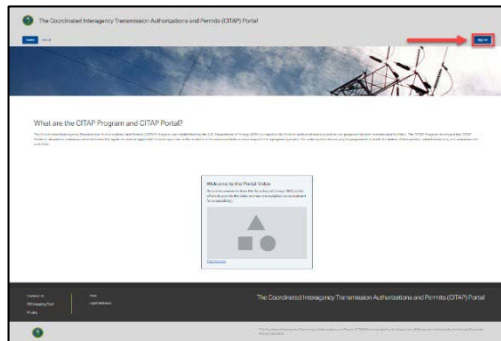
Image 21: Use agreement
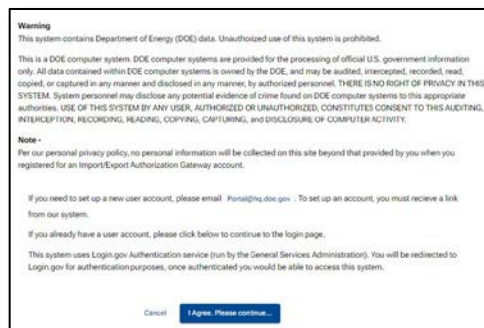
Image 22: OneID
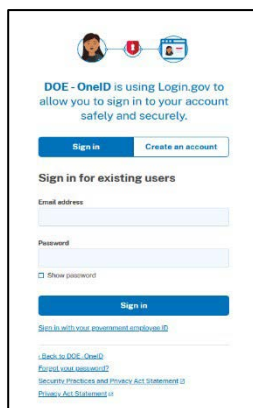
4. After successfully logging on, select *Begin a new project* from the home page.

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Begin a New Project

Project Attributes

After successfully logging on, select ***Begin a new project*** from the home page.

All project proponents must complete the **Project Attributes** questionnaire. These questions preliminarily establish if your project might be a qualifying project for the CITAP Program. Please note DOE will determine if your project is a qualifying project <u>after</u> reviewing your IIP Process Initiation Request.

After answering the (6) questions, type in a ***Project Name*** and complete the ***Contact Information*** section. NOTE: The email address used will be sent a validation notification that requires the user to respond. It is important that this validation is completed in order to access the project record and receive project update notices.

Select ***Submit*** after answering all the questions and a results window will appear. (See image 23)

Image 23: Project attributes

Questionnaire Results

1. If all answers are true, you may have a qualifying project. DOE will verify eligibility during the next step of the CITAP process.

    a. Select the **Project Dashboard** option to open the Active Project list.

    Image 24: Successfully Submitted
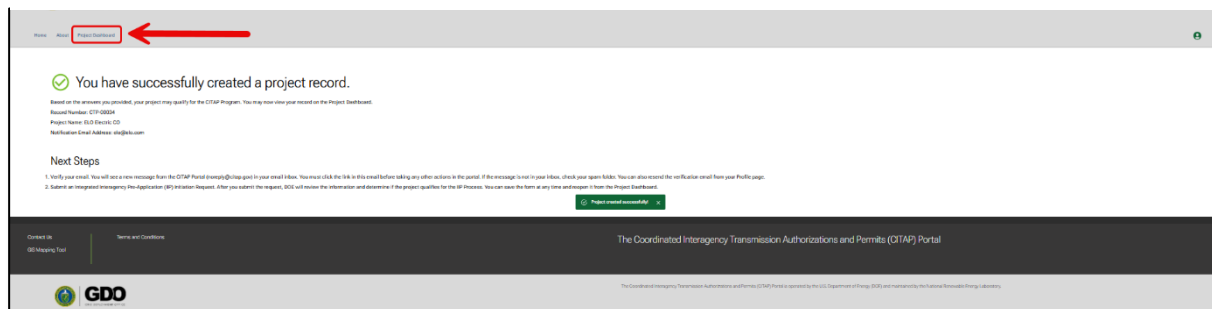
2. If any answers were false, your project does not meet CITAP pre-qualification attributes; however, you can still request to use the process.

    a. Select **Request to Qualify** to open the form. (See image 25)
    b. Fill in the form on the next page (see *image 26*) to provide DOE with more information on your project.
    c. Select **Submit** to issue the request form. (Optionally, users can select **Save** to retain what data was entered to return and submit later.)

    Image 25: Project does not meet CITAP pre-qualification.
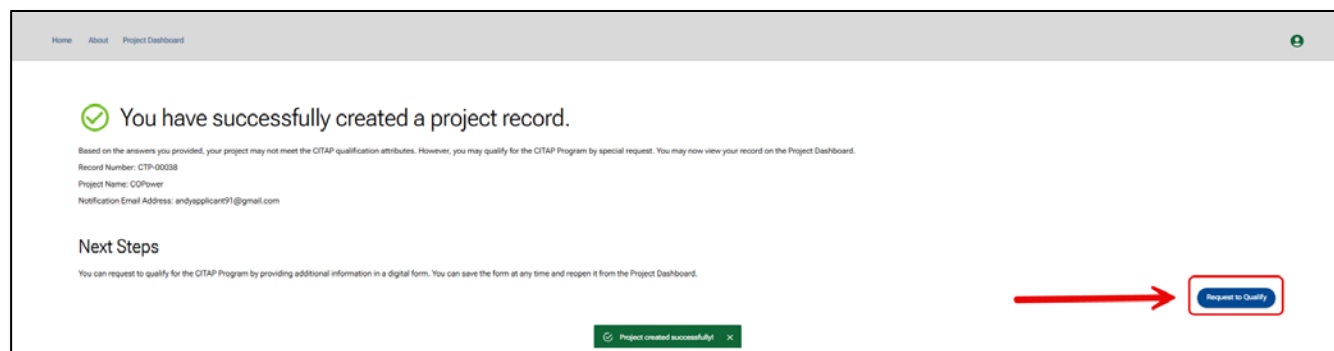
Image 26: Request to qualify form

Verify Your Email

Check your inbox for a message from the CITAP Portal (noreply@citap.gov).

Open the email and click on the button in the email. A web browser page will open to the CITAP Portal. If you are not logged in, you will be required to log on using your OneID credentials.

Once logged in, you will see the confirmation page.

Image 27: Successfully Verified Confirmation

Your email has been successfully verified.

You can now access your project dashboard

Go to Project Dashboard
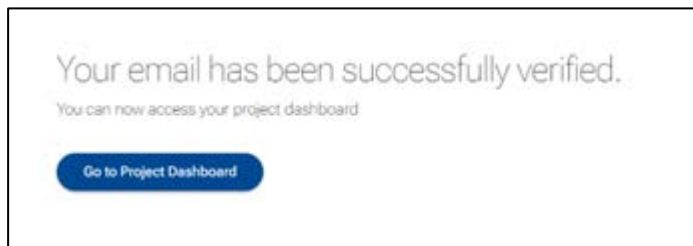
The table on your profile will update to indicate the email has been certified. Find troubleshooting tips in [Part 1](#).

Image 28: Notification Settings Email Statuses

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Request to Use the IIP Process

The project proponent will fill in this form and provide the documents the DOE reviewers require to evaluate if the project can use the integrated interagency Pre-Application (IIP). The timeline for review will not begin until the form is submitted.

Complete all required fields marked with an asterisk. An attachment *must be uploaded* to each question in order to submit the form.(See image 29)

Click **Save** at the bottom of the page to pause your work and return at a later time.

Image 30: Saved Confirmation

Next time you log into the portal go to the **Project Dashboard** to reopen the page and pick up where you left off. Reviewers will not be able to review any project with the status "Not Submitted".

Click **Submit** once the form is completed and all attachments are included.
- To activate the button, users must first check the Disclaimer box near the bottom of the page.
- Red outlined boxes identify any missing data.

Image 31: Missing Attachment Alert
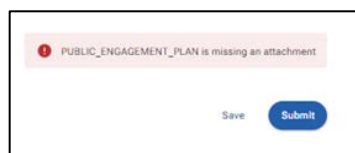
IMPORTANT: The page will lock after submission and the project proponent will be unable to delete attachments or edit fields without requesting the modification in the Change Log. (see Part 1)

NOTE: DOE has provided an additional resource to help complete Question 10 on Geospatial Information. (https://gem.anl.gov/tool/citap/)

Image 29: Request to Use IIP Form

Successful Submittal

Upon submitting the request, project proponents should see a confirmation notice, as shown in image 32. DOE will be notified of the new record and will assign a primary reviewer. Allow 20 calendar days for a response.

*Image 32: Success notice*
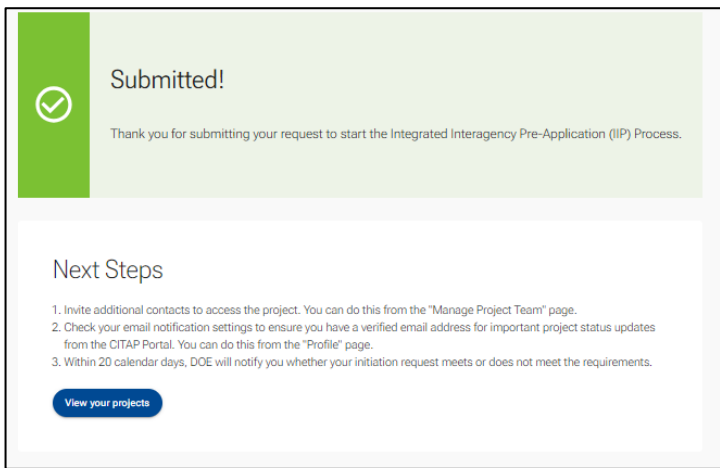
Invite Contacts to Your Project Team

The project proponent who creates the record automatically has access. If you would like to grant access to additional contacts from your organizations, follow these steps. There is no limit on the number of contacts invited.

1) Open the project and select the ***Project Team*** page from menu.
2) Invite your colleague by typing in their email address, then click the ***+Invite*** button.

Image 33: Manage Project Members
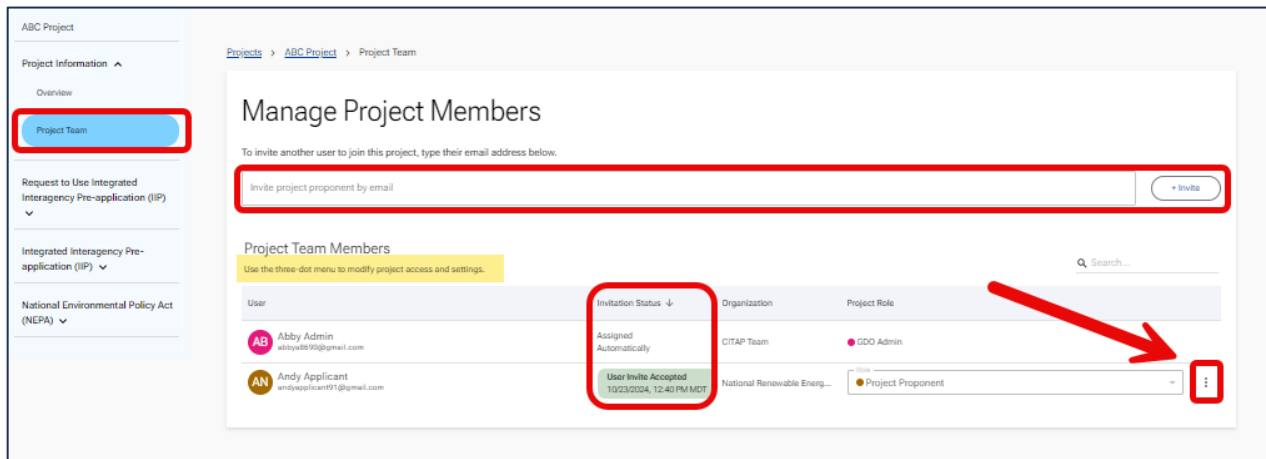
3) After the email is sent, you will see their email appear below in the Project Team table with a "pending" status.
4) They must respond, then the table will update showing a "verified" status.

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Review Period

Once you have successfully submitted the request form, the documents you uploaded will automatically appear on the corresponding page under Attachments. During this phase, the project proponent will correspond with DOE to provide all remaining information required to use the IIP.

Within 20 days of the receipt of the IIP Process Initiation Request, the DOE reviewer will respond with comments on each page and may attach documents for the project proponent's review. (See example image 34.)

Image 34: Receiving comments from reviewers
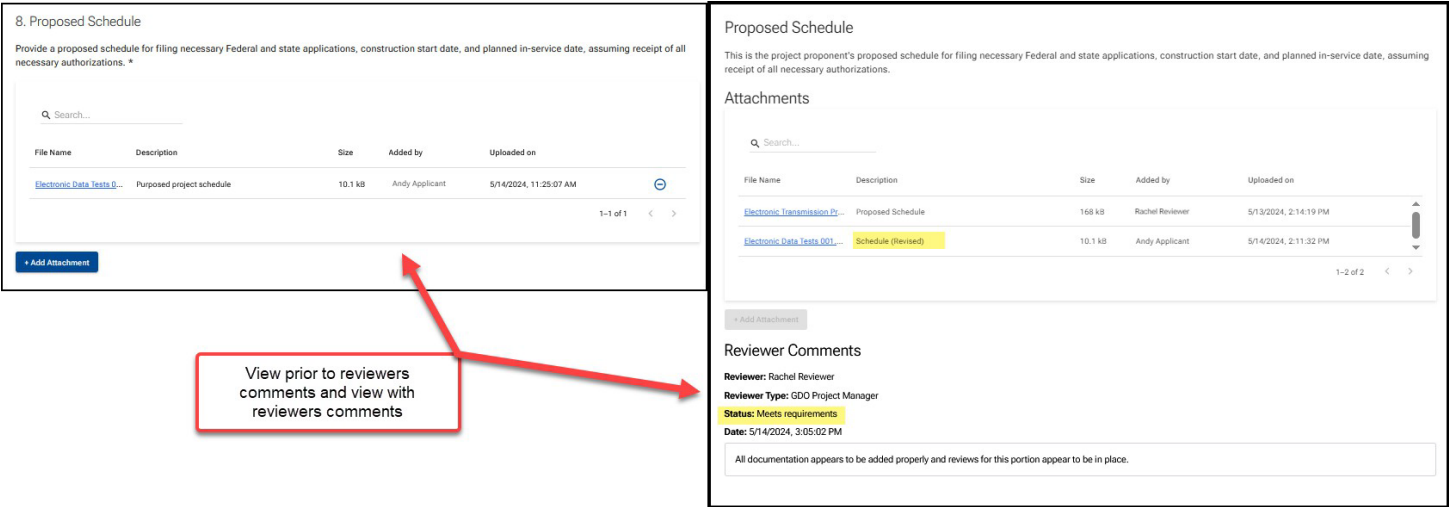
If any sections are marked **Deficient**, read the comments to learn what missing information is needed. Make the revisions, upload any revised documents. Your DOE reviewer will be notified when you add attachments.

Initiation Request Determination

Navigate to the **Initiation Request Determination** page to see all comments and attachments transmitted from DOE. The image below is a preview of a generated Initiation Request Determination:

Image 35: Initiation Request Determination

At the top of the form, the DOE reviewer will indicate the overall status of the Request to Use IIP. The status indicators are:

- **Meets requirements** – The project is proceeding to the next step.
- **Does not meet requirements** – The project is not eligible for IIP, based on the information provided. DOE will provide a justification for the determination. Project proponents can return to the homepage to begin again with a new or revised project.

Scroll through the **Initiation Request Determination** to view the status of each section in the request.

If the project is marked **Meets Requirements**, DOE will notify the project proponent and schedule an initial meeting for the IIP Process.

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IIP Process

The IIP Process is an iterative process anchored by three meetings: the Initial Meeting, the Review Meeting, and the Closeout Meeting. These meetings are milestones in the process and do not preclude any additional meetings or communications between the project proponent and the relevant Federal entities.

Initial IIP Meeting and Meeting Summary

The Initial meeting will be scheduled by the DOE reviewer. Following the meeting, the project proponent should visit the "Initial Meeting Summary" page to download the summary provided by DOE. (See image 36)

Project proponents may provide any corrections within 10 days of DOE sharing the summary. Use the **+ Add Attachment** button to upload an annotated version of the summary.

Image 36: Initial Meeting Summary

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Resource Reports

Upload documents supporting 13 resource reports. Take care to upload your files into the correct section on the page to ensure reviewers receive your documents.

To download individual resource report requirements and instructions, click the hyperlinked resource report file name (as shown in image 37).

Image 37: Resource Report requirements
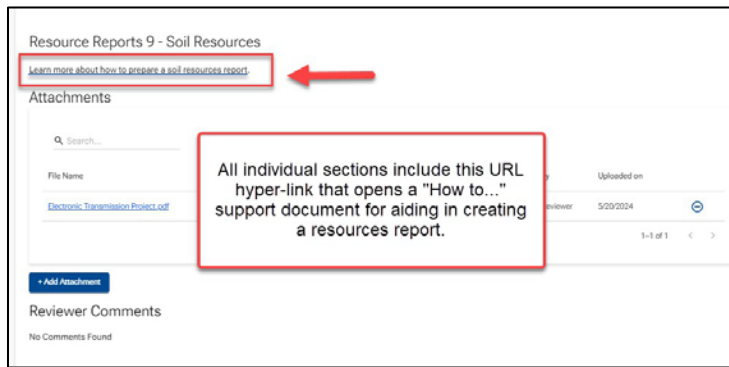
Add Attachments

Select the **+ Add Attachment** button within the chosen section, then give the file a descriptive title for the reviewer. (NOTE: Upload one file at a time.) See images 38-41.

Image 39: Select your file

Image 38: Add attachment

Image 40: Add description and upload
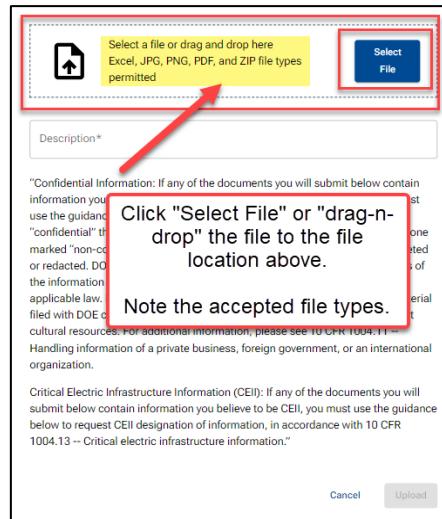
Image 41: File attached
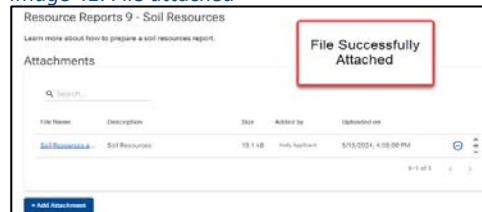
Revised Attachments

DOE may provide feedback on the initial Resource Reports that warrant a revised submittal. Locate the left navigation menu and select the **Resource Reports** page. Scroll to the section where a revision attachment is needed. (See image 42)

Select **+ Add Attachment**, locate and select the revised file to attach, and type a description identifying this is a "revised" file, as shown in example image 25. Again, upload one file at a time. NOTE: You will not be permitted to delete any existing attachments, only add new attachments (remember to modify the filename for the revised file to avoid a "file exists" error).

Image 42: Attaching a revised Resource Report

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Request an IIP Review Meeting

Fill out the information on the *Request a Review Meeting* form. All attachments must be uploaded to the *Resource Reports* form and *Request a Review Meeting* to move forward.

Project proponents must notify DOE when they are ready for a review meeting by emailing citap@hq.doe.gov. There is no **Submit** button during this iterative process.

NOTE: While the forms are still editable at this time, making changes or adding new documents can extend the review period and impact the project timeline.

Sending the email marks the beginning of a 60-day period for Federal/non-Federal to review and determine if the project is eligible for a review meeting. Reviewers will add comments to the CITAP portal pages (see image 44).

Image 44: Reviewer comments by section

On the Review Meeting request page, the DOE reviewer will communicate whether the project is ready for a review meeting. Project proponent will see the status of the project marked as one of two options:

- **Meets requirements**
- **Does not meet requirements**
- **Deficient (Needs more information)**

If a section is marked **Deficient**, project proponents can upload additional information on the following two pages:

- Resource Reports
- Request a Review Meeting

Reference image 42 for a model of uploading revised Resource Reports.

Project proponents may upload additional information on the following two pages:

- Resource Reports
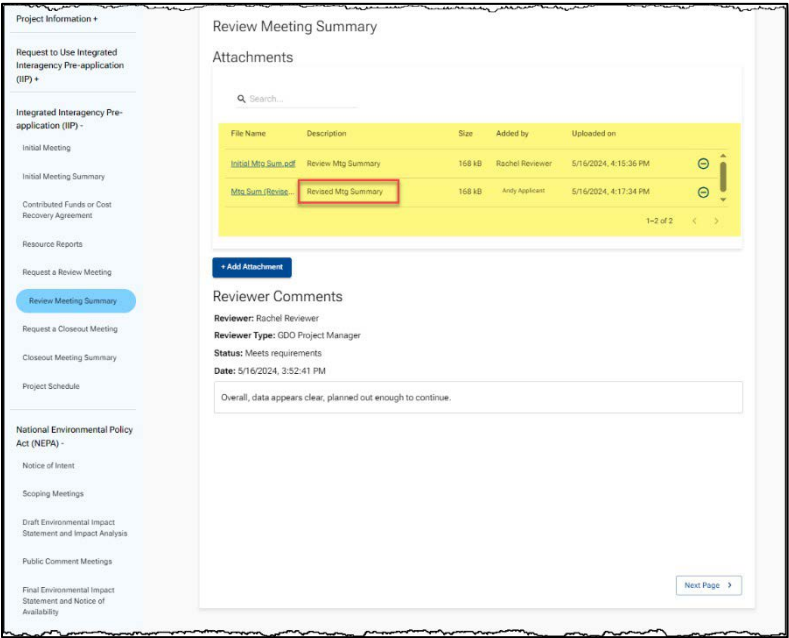- Review Meeting Request

NOTE: This will extend the IIP timeline.

Once the request is marked as **Meets requirements**, DOE will reach out to schedule the IIP Review Meeting.

IIP Review Meeting Summary

The DOE reviewer will transmit a summary of feedback from the review meeting on this page. Download the summary for guidance on revising the IIP documents or providing additional documents.

Project proponents must review and provide any corrections within 10 days of DOE sharing the summary. Upload an annotated version of the summary using the *+ Add Attachment* button. Remember to add the word "revise" or "revision" to the file description.

Image 45: Review Meeting Summary

Closeout Meeting Request

Use this page to upload documents revised during the IIP process.

If resource reports need to be revised, upload them to the **IIP Resource Reports** page.

All attachments must be uploaded to the form to request a closeout meeting.

Once the form is complete, email citap@hq.doe.gov to request an IIP closeout meeting.

After the email is sent, Federal/non-Federal entities will review and determine if the project is eligible for a closeout meeting. Reviewers will add comments to the CITAP portal pages.

Within 60 days of receiving the email, the DOE reviewer will determine whether the project is ready for a closeout meeting. Project proponents will see the project status marked as one of three options:

- **Meets requirements**
- **Deficient (needs more information)**

Project proponents may upload additional information on the following two pages:

- Resource Reports
- Closeout Meeting Request

NOTE: This will extend the IIP timeline.

Once the request is marked as **Meets requirements,** DOE will schedule the Closeout Meeting.

IIP Closeout Meeting Summary

The DOE reviewer will transmit a summary of feedback from the closeout meeting on this page. Download the summary for guidance on revising the IIP documents or providing additional documents.

Project proponents must review and provide any corrections within 10 days of DOE sharing the summary. Upload an annotated version of the summary using the **+ Add Attachment** button. Remember to add the word "revise" or "revision" to the file description.

The IIP closeout meeting concludes the IIP Process.

Image 49: Closeout Meeting Summary

Project-Specific Schedule

There is no action for the project proponent on this page.

DOE will provide a schedule for the next phase of the review process, and project proponents download the schedule from the Attachments.

Image 50: Project Schedule

Top of the Document

National Environmental Policy Act Section

Work with your primary reviewer to complete the pages under the National Environmental Policy Act (NEPA) section. Project proponents can upload attachments and view comments from reviewers.

Image 51: NEPA Section

Part 3: Additional resources

- Tutorial video of the CITAP Portal (15-minutes):
    - https://www.youtube.com/embed/ayWl_GYBxA0?si=hIdI_3woi2OW5zpI
- About the CITAP Program: https://www.energy.gov/gdo/coordinated-interagency-transmission-authorizations-and-permits-program
- Contact us: citap@hq.doe.gov
- The Geospatial Energy Mapper is a resource for completing the Request to Use IIP:
    - https://gem.anl.gov/tool/citap
    - GEM Tutorial Video (10-minutes) https://www.youtube.com/embed/9u6CQ2Zmnb8?si=THp_6s6sZwtpDmOM