

Caltrans Encroachment Permit System (CEPS) Accounts and Applicants

1. General Description

Documenting Applicants on the Standard Encroachment Permit Application (form TR-0100) in paper or Adobe Acrobat format is slightly different than documenting applicants online in the new CEPS. The following is a brief description of how Portal Accounts, or Profiles, are used in the new CEPS.

Individuals and companies (businesses) are considered separate entities, or contacts, in CEPS.

Creating a Profile (Portal Account) in CEPS.

1. Individual Portal Account - Every individual should have their own CEPS profile, or Portal Account.
 - a. A Portal Account requires an email address. For an individual account, the email can be a personal or work email address that is assigned to the individual and not to a group of individuals.
2. Company Portal Account - A company may or may not have a Portal Account.
 - a. A Portal Account requires an email address. For a company account, an individual may have access to the email address or a group of individuals.
3. Every individual and company Portal Account must have a unique email address.

Using these three rules, CEPS Portal Accounts can be created for an individual or for a company.

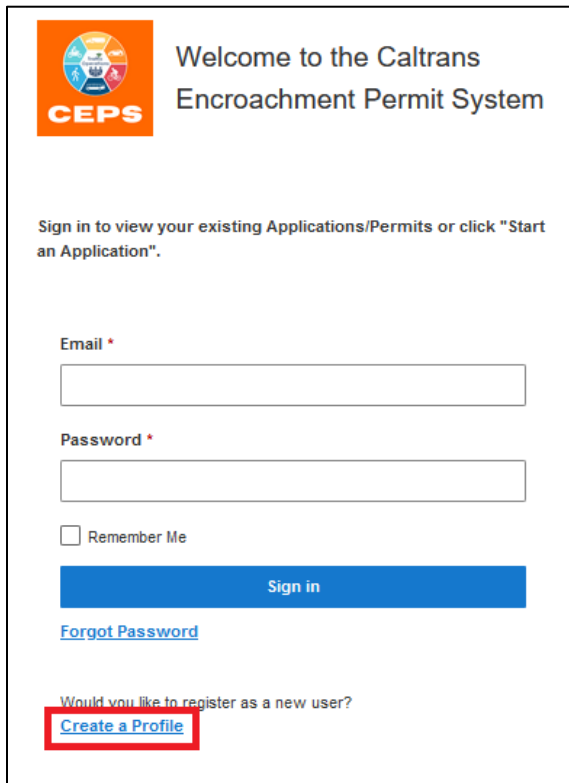
An individual should not apply on behalf of a company using a company portal account.

2. Create an Individual CEPS Account and Profile

Use your name when creating an individual profile, not a company name.

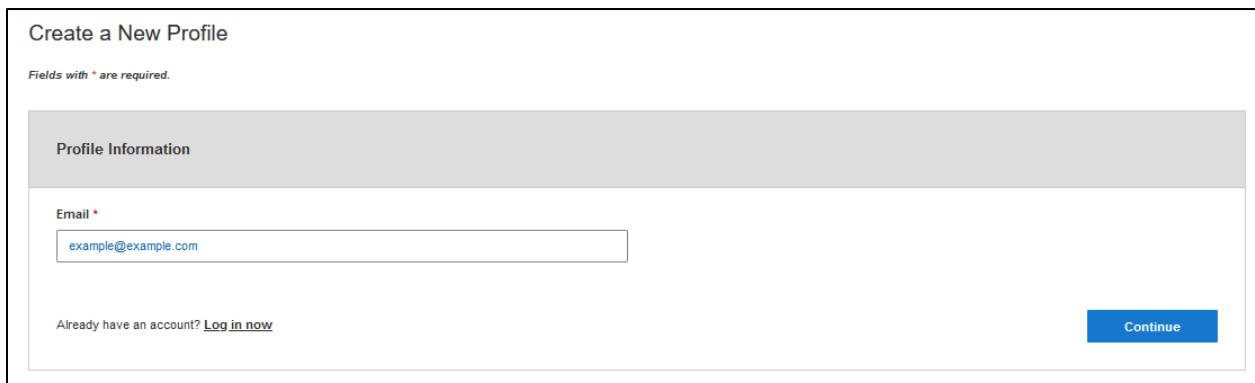
Each individual should have their own CEPS Portal Account. Use your individual work or personal email address as the Portal Account email (Username).

1. Click on Create Profile.



The screenshot shows the CEPS login page. At the top left is the CEPS logo, which consists of a circular icon with various symbols and the text 'CEPS' below it. To the right of the logo, the text reads 'Welcome to the Caltrans Encroachment Permit System'. Below this, there is a message: 'Sign in to view your existing Applications/Permits or click "Start an Application".' There are two input fields: 'Email *' and 'Password *'. Below the password field is a checkbox labeled 'Remember Me'. A blue button labeled 'Sign in' is positioned below the checkbox. A link labeled 'Forgot Password' is located below the 'Sign in' button. At the bottom, there is a question 'Would you like to register as a new user?' followed by a link 'Create a Profile' which is highlighted with a red rectangular box.

2. On the Profile Information tab, enter your work or personal unique email address in the Email field and click Continue.



The screenshot shows the 'Create a New Profile' page. At the top, it says 'Create a New Profile' and 'Fields with * are required.' Below this is a section titled 'Profile Information'. There is an 'Email *' field with the placeholder text 'example@example.com'. At the bottom left, there is a link 'Already have an account? Log in now'. A blue button labeled 'Continue' is located at the bottom right of the form.

3. On the Contact Information tab, ensure the "Individual" button is filled in with a blue color.

For Contact Type, choose:

1. "Employee of Permit Related Entity" - if you will be applying for permits on behalf of a company.
2. "Property Owner – Individual / Company / Organization" if you own property adjacent to a State highway.

Enter your information into the required fields (required fields have an asterisk *). Enter your work or property address and other information as needed, but this is not the information for the company's profile or account.

When finished, click Continue.

Contact Information

Fields with * are Required

Enroll as:
 Individual Company

Contact Type * Address 1 *

Title Address 2

First Name * MI City *

Last Name * State / Province * Postal / Zip Code *

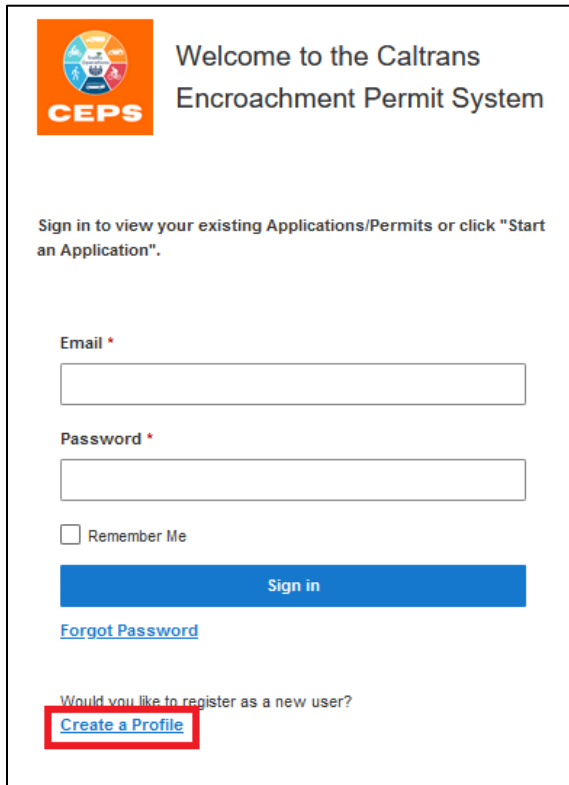
Mobile Phone Phone *

(123)456-7890 (123)456-7890

3. Create a Company CEPS Account and Profile

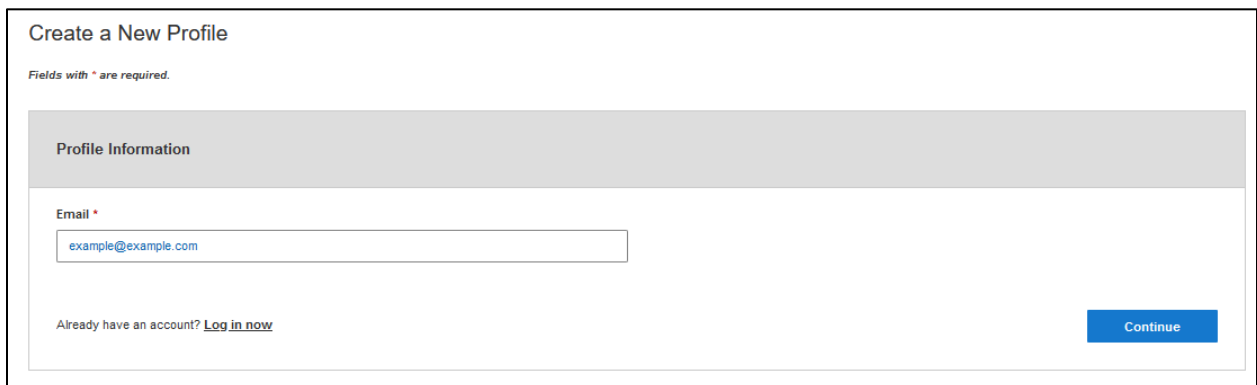
Each Company can also create a CEPS Profile / User Account but is not required to do so. When creating a Company Profile, remember that the email address must be unique in the system (an existing email cannot be used).

1. Click on Create Profile



The screenshot shows the login page for the Caltrans Encroachment Permit System (CEPS). It features the CEPS logo on the left and the text "Welcome to the Caltrans Encroachment Permit System" on the right. Below the logo, there is a sign-in form with fields for "Email *" and "Password *". A "Remember Me" checkbox is located below the password field. A blue "Sign in" button is positioned below the form. A link for "Forgot Password" is located below the "Sign in" button. At the bottom of the page, there is a question "Would you like to register as a new user?" with a red-bordered "Create a Profile" button highlighted.

2. Enter a unique email address and click Continue.



The screenshot shows the "Create a New Profile" page. It has a header "Create a New Profile" and a sub-header "Profile Information". Below the sub-header, there is a form with an "Email *" field containing the text "example@example.com". At the bottom left, there is a link "Already have an account? Log in now". At the bottom right, there is a blue "Continue" button.

3. On the Contact Information tab, ensure the “Business/Company” button is filled in with a blue color.

For Contact Type, choose the best option that applies to the company:

“Contractor - Company / Organization” - if the company has a contractor’s license or acts as a contractor for the Applicant

“Developer - Company / Organization” - if the company is a Developer

“Non-Profit - Company / Organization” - if the company is registered as a non-profit under State and Federal rules

“Public Corp - Local Agency, City/County/Municipality” - if the company is a city, county, or public municipality

“Utility - Regulated by CPUC” - if the company and projects are regulated by the California Public Utilities Commission

“Utility - Not Regulated by the CPUC” - if the company is not regulated by the California Public Utilities Commission

“Property Owner - Individual / Company / Organization” - if the company does not fall into one of choices above

Enter the company’s information into all the required fields (required fields have an asterisk *). Enter the company’s information.

When finished, click Continue.

Contact Information

Fields with * are Required

Enroll as:

Individual Company

Contact Type *

Address 1 *

Business Name *

Address 2

City *

State / Province * Postal / Zip Code *

Mobile Phone (123)456-7890

Phone * (123)456-7890

Continue

4. Start an Application

CEPS uses “Capacity” and “Contact Type” to document certain aspects of individuals, companies, and their respective “roles” on an application. Each Contact (applicant) on an application must have a Capacity, a Contact Type, and be active (not expired).

Every CEPS application must have an individual or a company with the Capacity of Applicant and the Applicant is the responsible party requesting the permit.

In most cases, a company will be the Applicant. The exceptions are when a property owner is requesting a driveway permit, installing a mailbox at their existing driveway, etc.

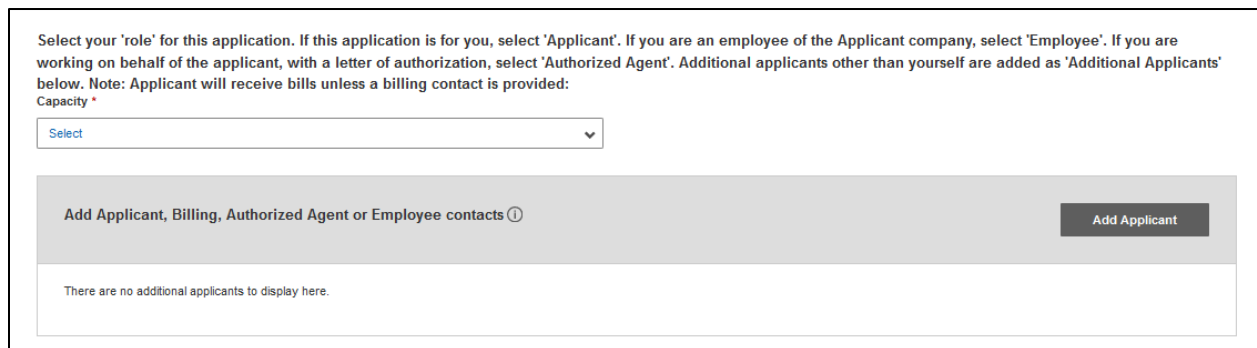
The “Contact Type” represents a particular aspect of the individual or company and usually does not change.

An individual will have a Contact Type of “Employee”, or “Property Owner.” A company has several options for Contact Type (see above).

Examples

Following are a few examples to highlight the difference between Capacity and Contact Type when starting a CEPS application.

Example 1 An employee of a utility company applies for permit on behalf of a utility company.



Select your 'role' for this application. If this application is for you, select 'Applicant'. If you are an employee of the Applicant company, select 'Employee'. If you are working on behalf of the applicant, with a letter of authorization, select 'Authorized Agent'. Additional applicants other than yourself are added as 'Additional Applicants' below. Note: Applicant will receive bills unless a billing contact is provided:

Capacity *

Select

Add Applicant, Billing, Authorized Agent or Employee contacts ⓘ

Add Applicant

There are no additional applicants to display here.

1. When signed in with your individual portal account and in the process of starting an application, click “Select” under the “Select your role for this application” question and choose “Employee.”

The next question is asking about other “Contacts” on the application. In this example, the Employee for the utility company is applying for the permit on behalf of the utility company. So, the utility company is the Applicant and must be added to the application with the Capacity of Applicant.

2. Click Add Applicant. For Capacity, select Applicant.

Ensure the “Business” button is selected to ensure the correct fields are present. Enter the Business (company) Name, address, phone, etc. for the Applicant. An email and mobile phone are not required.

The screenshot shows a web form titled "Add Additional Applicant". At the top, it says "Fields with * are required." Below this is a "Capacity" dropdown menu with "Select" as the current option. Underneath is a radio button selection area where "Business" is selected (indicated by a blue dot) and "Individual" is unselected. A red rectangular box highlights the "Business" radio button. Below the radio buttons are several input fields: "Business Name", "Address Line 1", "Address Line 2", "City", "State" (a dropdown menu with "Select" as the current option), "Postal Code", "Mobile Phone", and "Phone". Each of these fields has a placeholder example: "(123)456-7890". At the bottom, there is an "Email" field and a "Contact Type" dropdown menu with "Select" as the current option.

After completing the address information for the company, enter the Contact Type. For this example, the utility company might be regulated by the CPUC, or might be a public utility district. Select the Contact Type that best fits the type of utility company.

Example 2 An Authorized Agent applies for a permit on behalf of a utility company.

When signed in with your portal account, click “Select” under the “Select your role for this application” question and choose “Authorized Agent/Engineer.”

Click Add Applicant. For Capacity, select Applicant.

Select “Business” to ensure the correct fields are present. Enter the Business (company) Name, address, phone, etc. An email and mobile phone are not required.

Example 3 An Authorized Agent applies for a permit on behalf of a utility company and includes a Billing Contact.

Follow the same process as in Example 2 but click Add Applicant one more time.

For Capacity, select Billing. Complete the information for the Billing Contact. If a Billing Contact is not added, the Applicant will receive bills and invoices.

Example 4 A homeowner wants to install a mailbox and their property is adjacent to a State highway that does not have access control.

When signed in with your portal account, click “Select” under the “Select your role for this application” question and choose “Applicant.”

The next question is asking about other “Contacts” on the application. In this example, since you are the applicant, an additional applicant is not needed, unless the bills need to be sent to a billing contact.

Since you are the applicant, you will receive the bills and invoices unless a billing contact is added.

Continue completing the application and provide as many details as possible.