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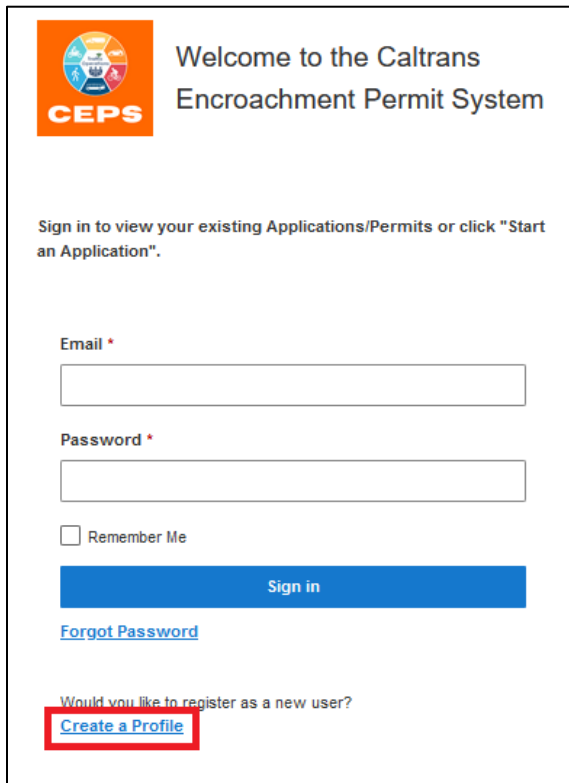
An individual should not apply on behalf of a company using a company portal account.

2. Create an Individual CEPS Account and Profile

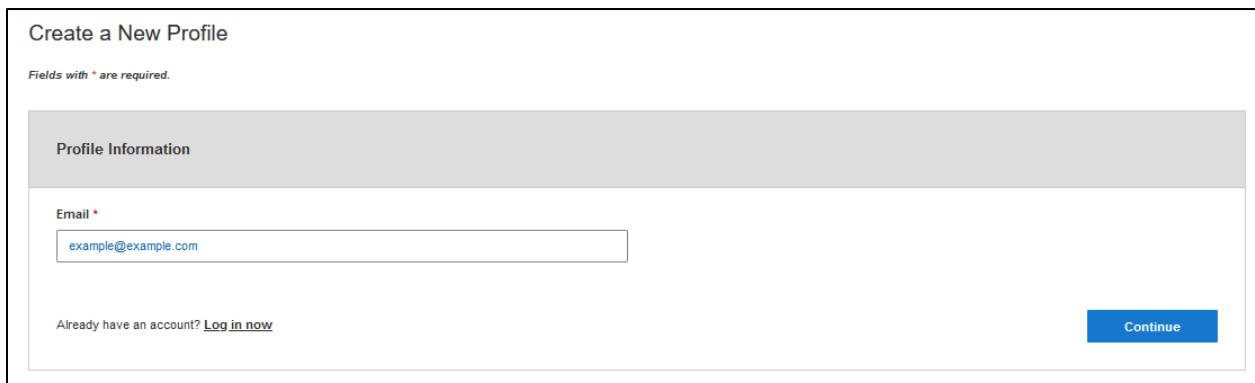Use your name when creating an individual profile, not a company name.

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.

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

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.
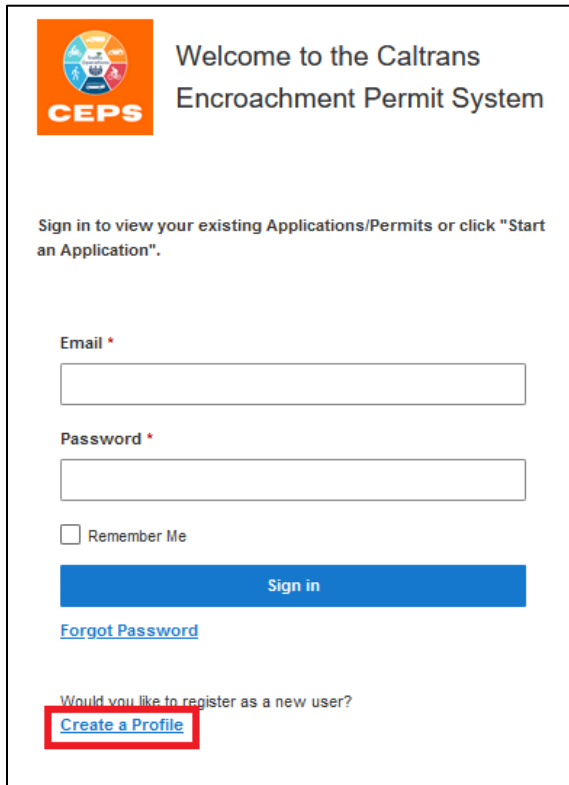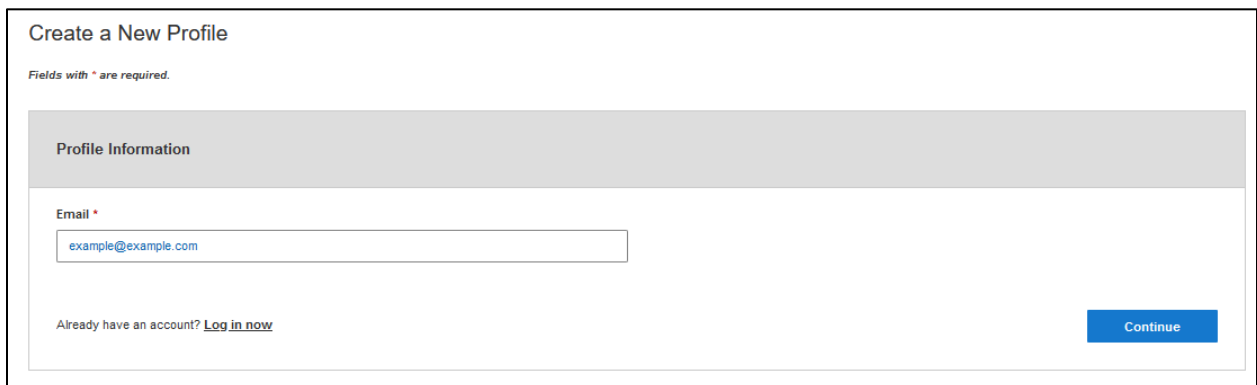
3. Create a Company CEPS Account and Profile

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

2. Enter a unique email address and click Continue.

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.

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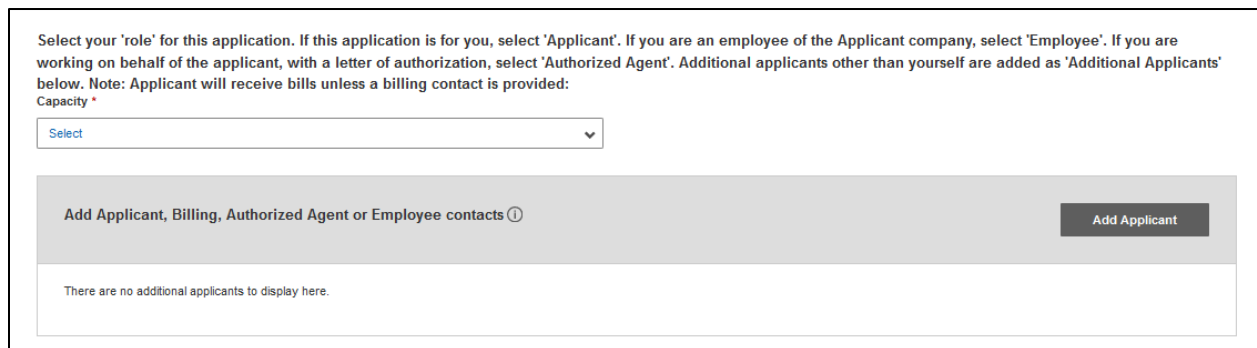
The "Contact Type" represents a particular aspect of the individual or company and usually does not change.

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.

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.

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.