



U.S. DEPARTMENT  
*of* **ENERGY**

Grid Deployment Office

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

User Guide for Project Proponents

CITAP User Guide for Project Proponents  
October 2024

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

The image consists of two side-by-side screenshots of the CITAP Portal interface. The left screenshot shows a form titled '1. Company contact Information' with the subtitle 'Legal name and principal place of business of project proponent requesting IIP Process Initiation'. The form contains fields for 'Company Legal Name \*', 'Type of Company', 'Company Address \*', 'State/Territory \*', 'City', and 'Zip code'. A red box highlights the 'Company Legal Name' field with the text 'Any missed or incomplete fields/data, a red outline appears for that missed information.' The right screenshot shows a list of error messages: 'Geospatial Info - Geospatial Information Start Coordinates is Required', 'Geospatial Info - Geospatial Information End Coordinates is Required', 'Third Party Contact - Company Type is Required', and 'Third Party Contact - Must be either a 5 digit or 9 digit (with hyphen) zip code'. At the bottom right of the right screenshot are 'Save' and 'Submit' buttons.

## 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.

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## 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

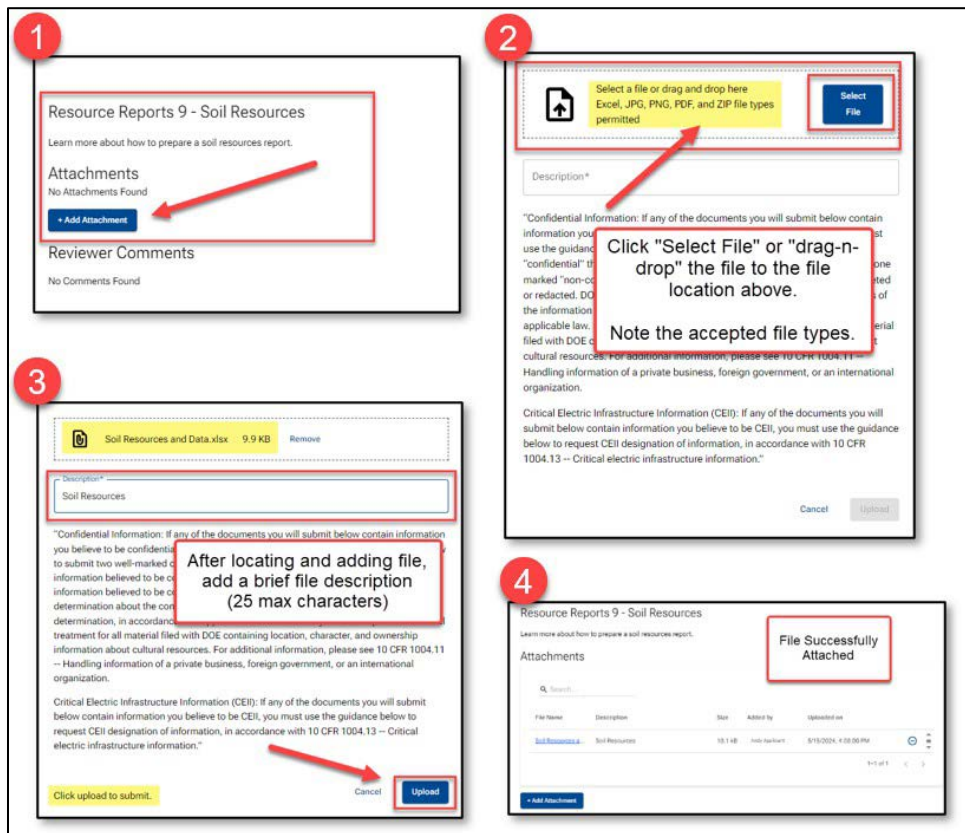
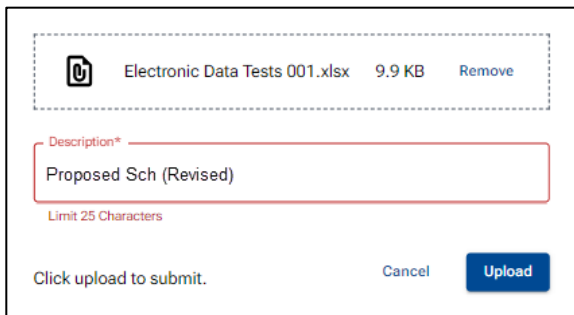


Image 4: Revised Attachment



## 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](mailto: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

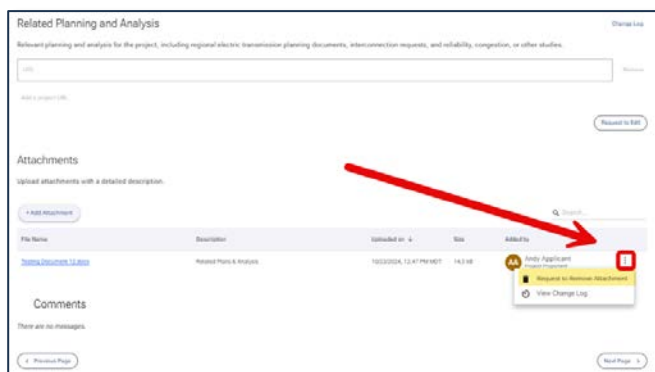
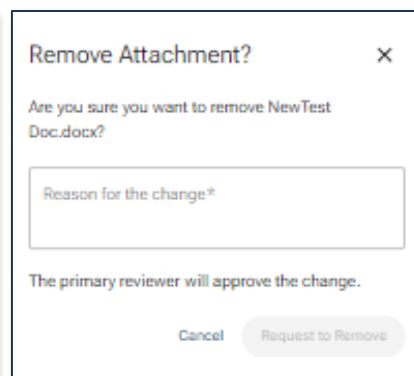


Image 6: Fill in the reason for the change before submitting the request.



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.

Image 7: Request to Edit

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

Image 8: Change Log Button

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).

Image 9: Sample Change Log

The screenshot displays a web interface with three main sections:

- Request to Edit:** A form at the top with a text input field containing "ABC Project". Below it is a "Previous Information" box showing a user profile for "Andy Applicant" (Project Proponent) with a "Submitted" status and a timestamp of "10/23/2024, 01:02 PM MDT". At the bottom of this section are "Cancel" and "Submit Request to Edit" buttons.
- Pending Requests:** A yellow header section with the text "These requests have been submitted to the primary reviewer to approve or deny." Below this is a "Request to Remove Attachment" box. It shows the same user profile and a "Submitted" status with a timestamp of "10/23/2024, 03:55 PM MDT". The box contains details: "REASON FOR CHANGE: Applicable changes made", "FILE NAME: NewTestDoc.docx (14.5 KB)", "UPLOADED BY: Andy Applicant", "ORGANIZATION: National Renewable Energy Laboratory", "UPLOADED ON: 10/23/2024, 12:48 PM MDT", and "DESCRIPTION: Proposed Project Descrip". A red rectangle highlights a "Cancel Request to Remove File" button at the bottom right of this box.
- History of Changes:** A yellow header section with the text "View the complete history of changes to the Project Description." Below this is an "Original Content" box showing the same user profile and a "Submitted" status with a timestamp of "10/23/2024, 01:02 PM MDT".

## 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](mailto: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.*

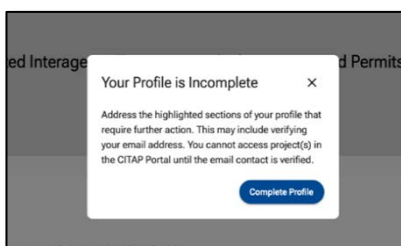
Image 11: Notifications section

Project	Event Page	Event Date ↓	Event Type
QA test 10/18 - Verify email via project attribute CTP-00020	Geospatial Information	10/18/2024, 01:20 PM MDT	Comment to Project Proponent
QA test 10/18 - Verify email via project attribute CTP-00020	FAST-41	10/18/2024, 01:20 PM MDT	Comment to Project Proponent
QA test 10/18 - Verify email via project attribute CTP-00020	Project Participation Plan, Part 2: Public Engagement Plan	10/18/2024, 01:19 PM MDT	Comment to Project Proponent
QA test 10/18 - Verify email via project attribute CTP-00020	Project Participation Plan, Part 1: Prior Outreach	10/18/2024, 01:19 PM MDT	Comment to Project Proponent
QA test 10/18 - Verify email via project attribute CTP-00020	Relevant Federal and Non-Federal Entities	10/18/2024, 01:18 PM MDT	Comment to Project Proponent
QA test 10/18 - Verify email via project attribute CTP-00020	Proposed Schedule	10/18/2024, 01:18 PM MDT	Comment to Project Proponent

## 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

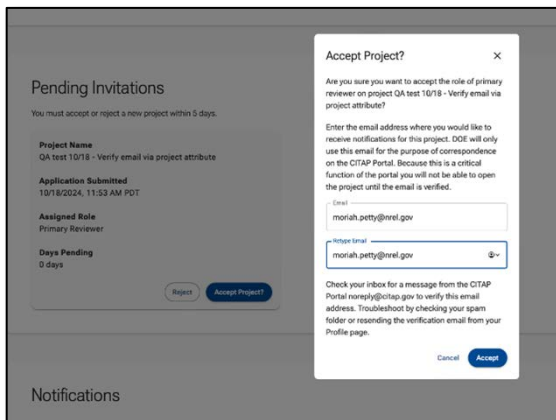


## Accepting an Invitation

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](mailto:noreply@citap.gov))
- 2) Click the button in the email to open the webpage.
- 3) Log in to the CITAP Portal (for existing OneID account holder)
  - 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.

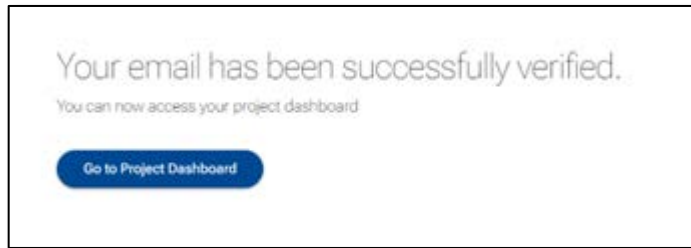
## Verifying Your Email

Check your inbox for a message from CITAP Portal from [noreply@citap.gov](mailto: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).

Image 14: Successfully Verified



### 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

The screenshot shows a web page titled "Notification Settings". Below the title is a paragraph of text explaining that the CITAP Portal sends email notifications and that users must verify their email address. Below this is a table with three columns: "Project Name", "Email Address", and "Email Verification Status". The table has four rows. The first row shows a project name, an email address ending in "@nrel.gov", and a status of "Invite Pending". A red box highlights the "Invite Pending" status and a blue button labeled "Resend Verification Email" to its right. The second, third, and fourth rows show email addresses ending in "@gmail.com" with a status of "Verified". A red box also highlights the "Resend Verification Email" button in the first row. At the bottom right of the table, there is a blue button labeled "Save", which is also highlighted with a red box.

# 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

Notification Settings

The CITAP Portal sends email notifications with project updates, such as a status change or a new comment from a reviewer. You may choose to use the same email address for all your projects or enter an alternate one. Since this correspondence is critical for maintaining the project timeline, you are required to verify the email before accessing the project. Check your inbox for a message from the CITAP Portal to verify each new email address.

Project Name	Email Address	Email Verification Status
	<div>Notifications Email</div> <div>@nrel.gov</div>	<div>Invite Pending</div> <div>Resend Verification Email</div>
	<div>Notifications Email</div> <div>@gmail.com</div>	<div>Verified</div>
	<div>Notifications Email</div> <div>@gmail.com</div>	<div>Verified</div>
	<div>Notifications Email</div> <div>@gmail.com</div>	<div>Verified</div>

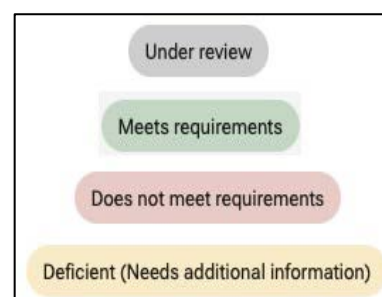
Save

## 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).

- **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.
- **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.
- **Does not meet requirements** – The project is not eligible to use the IIP Process, based on the information provided.
- **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

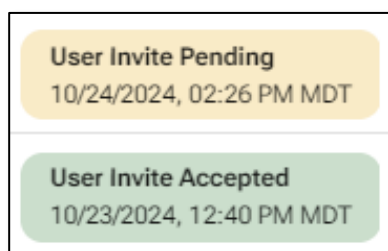


## Managing Your Project Team

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.
  - 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)
  - 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

ABC Project

Project Information ^

Overview

Project Team

Request to Use Integrated Interagency Pre-application (IIP)

Integrated Interagency Pre-application (IIP)

National Environmental Policy Act (NEPA)

Projects > ABC Project > Project Team

## Manage Project Members

To invite another user to join this project, type their email address below.

Invite project proponent by email

+ Invite

### Project Team Members

Use the three-dot menu to modify project access and settings.

Search...

User	Invitation Status	Organization	Project Role
AB Abby Admin@gmail.com	Assigned Automatically	CITAP Team	GDO Admin
RA Rachel Reviewer@gmail.com	User Invite Pending 10/24/2024, 02:26 PM MDT	GDO	Project Proponent
AN Andy Applicant@gmail.com	User Invite Accepted 10/23/2024, 12:40 PM MDT	National Renewable Energ...	Project Proponent

## 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](#).

# Part 2: Step-by-Step Instructions

## Sign In

The CITAP Portal requires an account with a verified identity. You may use an existing account from one of the options available on your Sign In screen or create a new account.

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. The Sign In view is unique to each user (example view in Image 22).
  - If you have an account with Login.gov or ID.me, select the correct tile to sign in with your existing information.
  - If you need to create a new account, select the Login.gov tile and create a new account. In addition to your password, Login.gov requires that you set up at least one authentication method to keep your account secure. Refer to Login.gov for instructions: <https://www.login.gov/help/get-started/create-your-account/>.

Image 20: CITAP Portal homepage

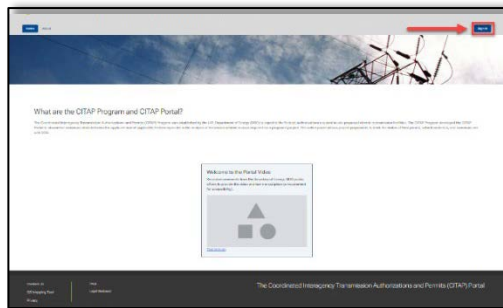


Image 21: Use agreement

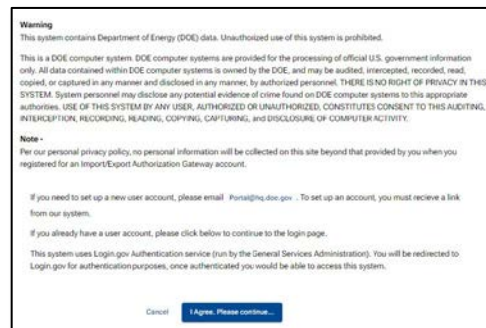


Image 22: The Sign In view is unique to each user. Use the option that works best for you.



## Trouble Shooting Your Sign In

### What is the difference between using Login.gov and ID.me?

Login.gov and ID.me are our two credential service providers.

**Login.gov** is a safe way to sign in to many U.S. government websites using just one account. You can [add a work email](#) to an existing account for interactions with the CITAP Portal. For more information, visit the [Login.gov help center](#).



**ID.me** is a private single sign-on provider that meets the U.S. government's online identity proofing and authentication requirements. You can use this same ID.me account to access both government and private services and you can [add a work email](#) for interactions with the CITAP Portal. For more information, visit the [ID.me help center](#).

### **Why is my Smart Card or CAC not working?**

Physical PIV (personal identity verification) cards or CACs (common access cards) are secure access options for some federal government employees, though not all are compatible.

If you cannot log in with your smart card, create an account either with Login.gov or ID.me by clicking on the tile on your Sign In screen. You can also contact your employer ITS for support.

# Begin a New Project

## Project Attributes

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 after 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

The screenshot shows a web form titled "Project Attributes". At the top, there are links for "Home", "About", and "Project Dashboard". Below the title, there is a paragraph of instructions: "DOE prequalifies a subset of transportation projects for the CITAP Program based on whether they meet certain eligibility criteria. These criteria are listed below. Please indicate if the proposed project fits the attributes listed, to help us determine if this is a qualifying project. If a project meets the attributes listed here, you may submit an initiation request. DOE will review both the attributes and initiation request to establish eligibility. If a project does not meet these attributes, you will be directed to a page where you may request consideration for the CITAP Program."

The "Project Attributes" section contains six questions, each with "Yes" and "No" radio buttons. The questions are:

- 1. The proposed project will either be a high-voltage (220 kV or above) line or a new or existing transmission line. DOE will determine if a project is eligible on a case-by-case basis. Project proponents will have the opportunity to provide information supporting this claim during the initiation request.
- 2. All or part of the proposed project will be used for the transportation of electric energy or information technology services for sale or delivery.
- 3. The proposed project is required to implement mitigation or environmental impact measures.
- 4. The proposed project is not proposed for implementation under Section 8 of the State Commercial Code, Laid to Rest in cooperation with a government project.
- 5. The proposed project is not proposed for implementation under Section 8 of the State Commercial Code, Laid to Rest in cooperation with a government project.
- 6. The proposed project will not be directly funded under the Electric Reliability (Section 8) of these provisions.

Below the questions is the "Name Your Project" section, which includes a text input field for "Name of Project?".

The "Contact Information" section includes a paragraph of instructions: "Provide additional information for your CITAP Project profile. Provide an email address for receiving correspondence from DOE on your project. After submitting this page, go to your email inbox to verify the address is correct. Note that this does not affect the email you use to log in to the CITAP Portal. Please include your preference for correspondence on individual projects." This section contains input fields for "Email\*", "Project Email\*", "Phone\*", "Address\*", and "City/State/Zip".

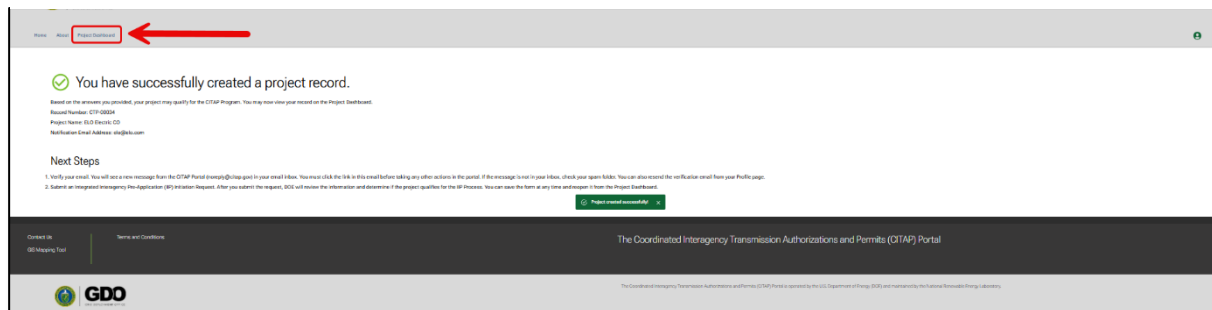
A red box highlights the instruction: "Answer all (6) questions, type a Project Name, then complete the Contact information below. Click SUBMIT to initiate the request." A red arrow points to the "Submit" button at the bottom right of the form.

## 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.

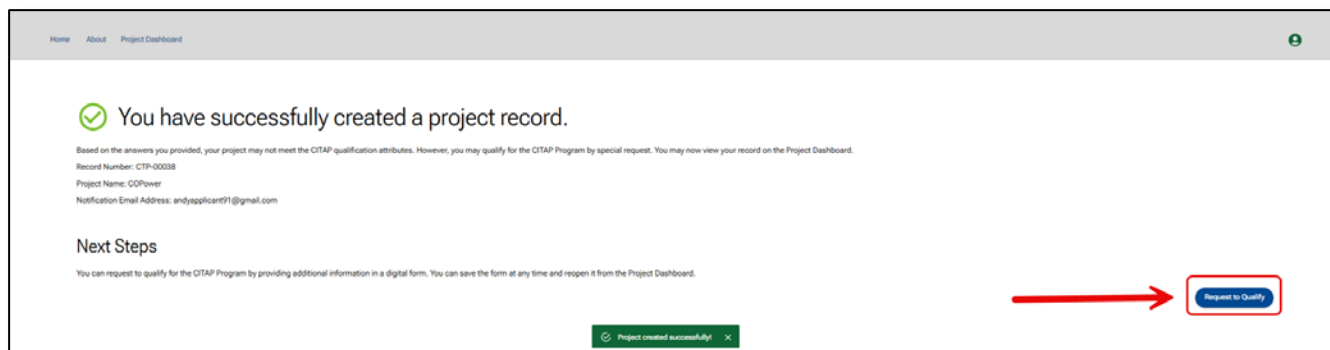


Image 26: Request to qualify form

Request to Qualify For Coordination Under the CITAP Program

If your project does not qualify for the CITAP Program based on attributes, you may still request that DOE consider it as a qualifying project. If approved by DOE, you may then submit a request to use the Integrated Interagency Pre-Application Process (IPAP).

In making the determination, DOE may consider:

- Whether the proposed project would benefit from CITAP Program coordination.
- Whether the proposed project would result in reduced competition costs for generating and delivering energy.
- Whether the proposed project would result in mitigation of weather and variable generation uncertainty.
- Whether the proposed project would result in an enhanced diversity of supply.
- Any other relevant factors.

Fill out the information below to request consideration.

DOE Control Number: 1910-0189  
Expiration Date: 09/30/2027

1. Company Information

Legal name and principal place of business of project proponent requesting IP Process Initiation

Company Legal Name\*  
COPower Co

Company DO  
COPower Co

Power  
123 USA Blvd

Company Address\*  
123 USA Blvd

City\*  
Garden

State\*  
80401

Country\*  
United States of America

If the project proponent has a principal office outside of the United States, please provide an irrevocable power of attorney document designating an agent residing within the United States.

Designated Point(s) of Contact Within Company

First Name\*  
Apply

Last Name\*  
Apply

Phone\*  
901-888-1234

2. Project Description

Provide a concise description of the proposed facility sufficient to explain its scope and purpose.

DOE Form\*  
COPower

3. Relevant Federal and Non-Federal Entities

Provide a list of the anticipated relevant Federal and non-Federal entities, including contact information for each Federal agency, state agency, Indian Tribe, or multistate entity that is responsible for or has a role in issuing an authorization or environmental review for the project. \*

4. Disclaimer \*

I agree to the [terms and conditions](#) of this form. I declare that I am certified to complete this application.

Save Submit

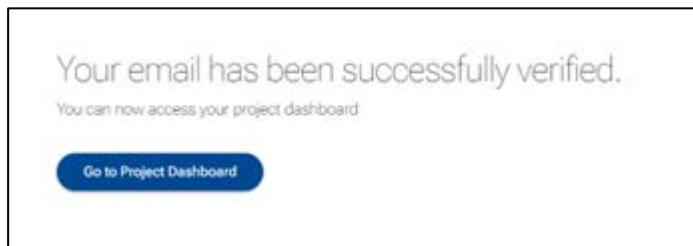
## Verify Your Email

Check your inbox for a message from the CITAP Portal ([noreply@citap.gov](mailto: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



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

Home

Account

Project Dashboard

1

Your Profile

Enter your name and organization as you would like them to appear to all users in the CITAP Portal.

Full Name\*

Single Email

This is your login email address for the CITAP Portal. You may provide an alternate email for project correspondence in the settings below.

Organization\*

COFFPOWER Co

Work Phone

903-555-1234

Extension

Notification Settings

The CITAP Portal sends email notifications with project updates, such as a status change or a new comment from a reviewer. You may choose to use the same email address for all your projects or enter an alternate one. Since this correspondence is critical for maintaining the project timeline, you are required to verify the email before accessing the project. Check your inbox for a message from the CITAP Portal to verify each new email address.

Project Name	Email Address	Email Verification Status
	Notifications@coffpower.com	Verified
	Notifications@coffpower.com	Verified
	Notifications@coffpower.com	Verified
	Notifications@coffpower.com	Verified
	Notifications@coffpower.com	Pending Verification
	Notifications@coffpower.com	

Resend Verification Email

## 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

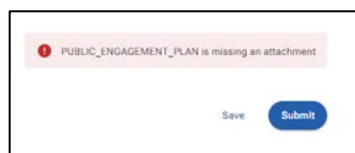


Next time you log into the portal go to the **Project Dashboard** to reopen the page and pick up where you left off. Reviewers will not be able to review any project with the status “Not Submitted”.

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.

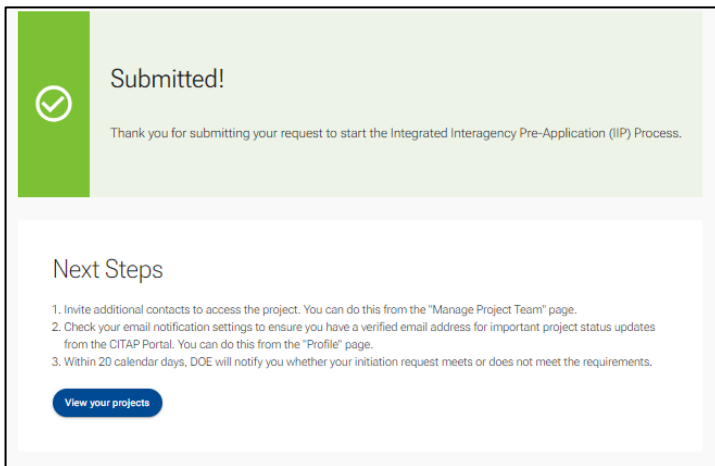
(<https://gem.anl.gov/tool/citap/>)

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

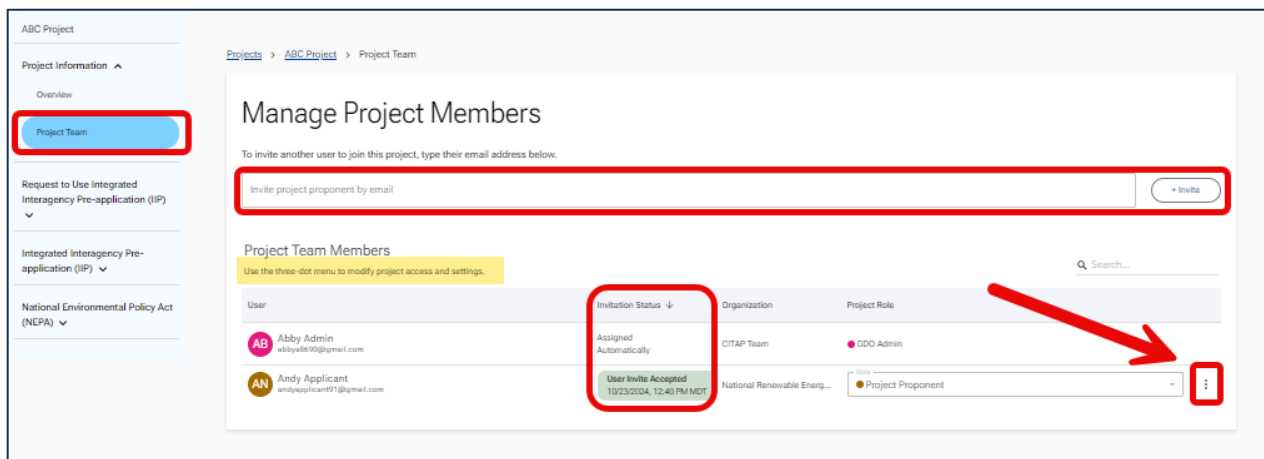


## Invite Contacts to Your Project Team

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



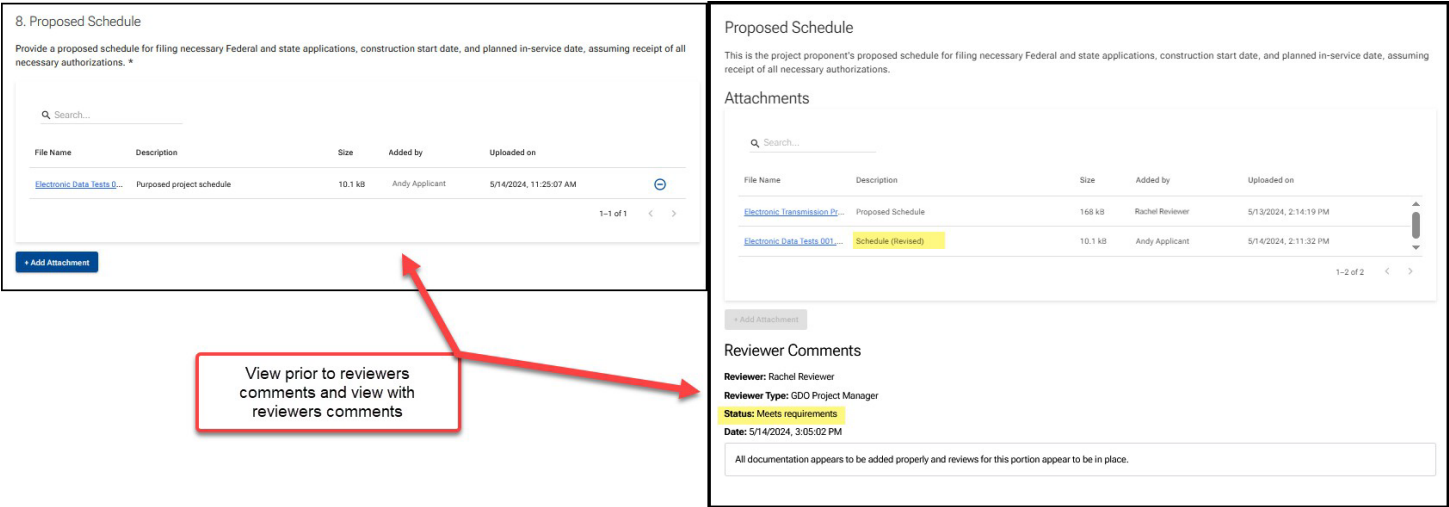
- 3) After the email is sent, you will see their email appear below in the Project Team table with a “pending” status.
- 4) They must respond, then the table will update showing a “verified” status.

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

Project Information +

- Request to Use Integrated Interagency Pre-application (IIP) -
- Company Contact
- Third Party Contact Information
- Statement of Intent
- Related Planning and Analysis
- Potential Routes, Evaluation Criteria, and Methods
- Project Description
- Partnering Firms and Subcontractors
- Proposed Schedule
- Relevant Federal and Non-Federal Entities
- Geospatial Information
- Project Participation Plan, Part 1: Prior Outreach
- Project Participation Plan, Part 2: Public Engagement Plan
- FAST 41
- Report Status
- Initiation Request Determination**
- Integrated Interagency Pre-

### Initiation Request Determination

Overall Project Approval by Project Manager

☒ Meets requirements  
☐ Does not meet requirements

**INITIATION REQUEST DETERMINATION**  
Here you will find the reviewers overall response with comments.

Initiation Request Determination

Reviewer: Rachel Reviewer  
Reviewer Type: GDO Project Manager  
Status: Meets requirements  
Date: 5/12/2024, 10:13:30 PM  
Various areas missing details.

Company Contact

Legal name of primary company applying for authorization permit  
Meets requirements

Designated point(s) of contact within company

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.

## 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

The screenshot displays the CITAP Portal interface. The header shows the portal name and navigation links. The sidebar on the left contains a list of project-related actions, with 'Initial Meeting Summary' highlighted. The main content area is titled 'Initial Meeting Summary' and contains instructions for reviewing and providing corrections. Below the instructions is a table of attachments, showing two files: 'Initial Summary' and 'Mtg Summary (Revised)'. At the bottom, there is a section for 'Reviewer Comments' with a '+ Add Attachment' button and a text area.

**Initial Meeting Summary**

An initial meeting summary will be prepared by DOE and shared with the project proponent and relevant Federal and Non-Federal entities within 10 days of the meeting.

You must review and provide any corrections within 10 days of Updated summary notes can be uploaded here.

DOE is ultimately responsible for finalizing the summary based

**Attachments**

File Name	Description	Size	Added by	Uploaded on
<a href="#">Meeting Summary Details.pdf</a>	Initial Summary	168 kB	Rachel Revis...	5/22/2024
<a href="#">Meeting Summary Copy.pdf</a>	Mtg Summary (Revised)	168 kB	Andy Applicant	5/22/2024

1-2 of 2

**+ Add Attachment**

**Reviewer Comments**

**Reviewer Type:** GDO Project Manager

**Status:** Meets requirements

**Date:** 5/22/2024, 4:51:20 PM

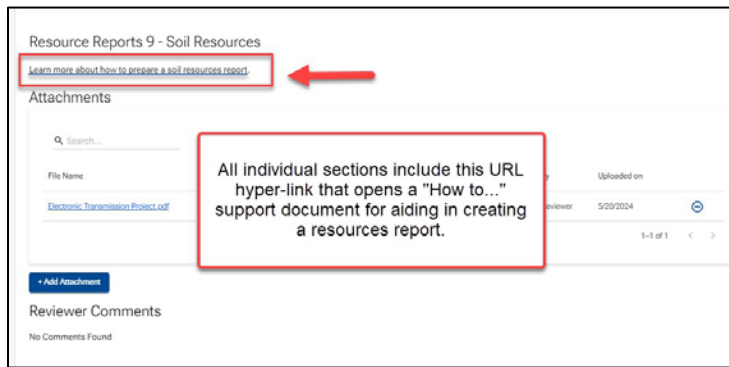
Every area appears in order.

## 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 38: Add attachment

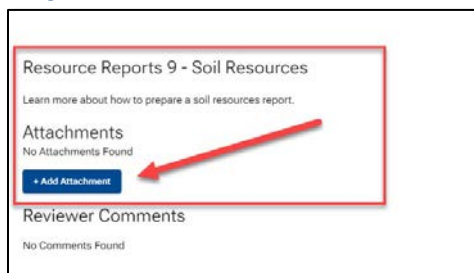


Image 40: Add description and upload

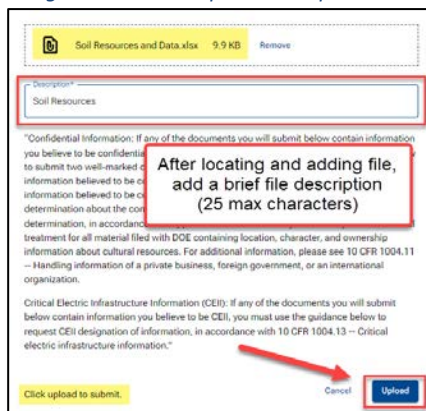


Image 39: Select your file

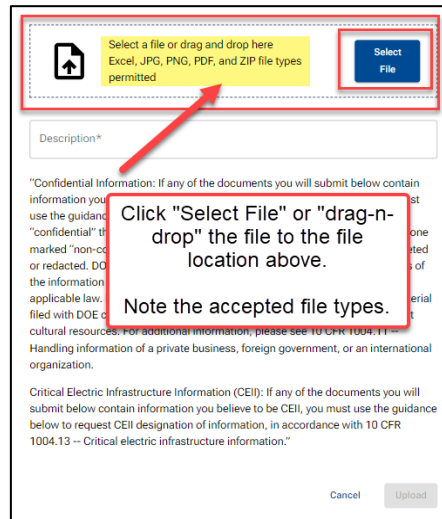
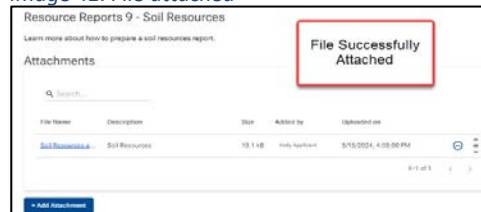


Image 41: File attached



## 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

The screenshot displays the DOE Resource Reports interface for 'Resource Reports 9 - Soil Resources'. The left navigation menu includes sections like 'Project Information', 'Request to Use Integrated Interagency Pre-application (IP)', 'Integrated Interagency Pre-application (IP)', 'Initial Meeting', 'Contributed Funds or Cost Recovery Agreement', 'Resource Reports', 'Request a Review Meeting', 'Review Meeting Summary', 'Request a Closeout Meeting', 'Closeout Meeting Summary', 'Project Schedule', 'National Environmental Policy Act (NEPA)', 'Notice of Intent', 'Scoping Meetings', 'Draft Environmental Impact Statement and Impact Analysis', 'Public Comment Meetings', and 'Final Environmental Impact Statement and Notice of Availability'. The 'Resource Reports' section is highlighted with a red arrow and a circled '1'. The main content area shows the 'Attachments' section with a search bar and a table of attachments. The table has columns for 'File Name', 'Description', 'Size', 'Added by', and 'Uploaded on'. Two attachments are listed: 'Electronic Transmission...' (Soil Resource data, 168 kB, 5/14/2024, 4:36:43 PM) and 'Electronic Data Tests 00...' (Soil Resource (Revised), 10.1 kB, 5/14/2024, 4:38:50 PM). The 'Add Attachment' button is highlighted with a red arrow and a circled '2'. Below the attachments is the 'Reviewer Comments' section, which is highlighted with a red arrow and a circled '3'. The reviewer comments show a response from Rachel Reviewer, dated 5/14/2024, 3:09:23 PM, stating 'Revised soil resources report meets standards.'

Locate the **Resource Reports** section in the left navigational panel, select it, scroll to the section that requires the revised file, click on **"Add Attachment"**, locate and select the file, then type a description that includes "Revised".

After the reviewer has responded, you will see their response in the **Reviewer Comments** area just below the Add Attachment button.

## 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](mailto: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 43: Resource Reports form & Request a Review Meeting form

**RESOURCE REPORTS & REQUEST A REVIEW MEETING**

Project proponents must fill out the Resource Reports page and the Request a Review Meeting page with attachments uploaded to each table before emailing DOE to request their review.

Image 44: Reviewer comments by section

**List of Timing of Non-Federal Authorizations**

Provide estimated dates that the project proponent will file requests for authorizations and consultations with relevant non-Federal entities.

**Attachments**

All attachments must be included to submit a review meeting request.

File Name	Description	Size	Added by	Uploaded on
<a href="#">Federal State Local Contacts.xlsx</a>	Non-Fed Information	10.1 KB	Andy Applicant	5/16/2024
<a href="#">Non-Federal Contacts (01).xlsx</a>	Non-Fed Info (Comments)	10.1 KB	Andy Applicant	5/16/2024

**Reviewer Comments**

Reviewer: Rachel Reviewer  
Reviewer Type: GDO Project Manager  
Status: Meets requirements  
Date: 5/16/2024, 3:20:41 PM  
Revised plans are good

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.*

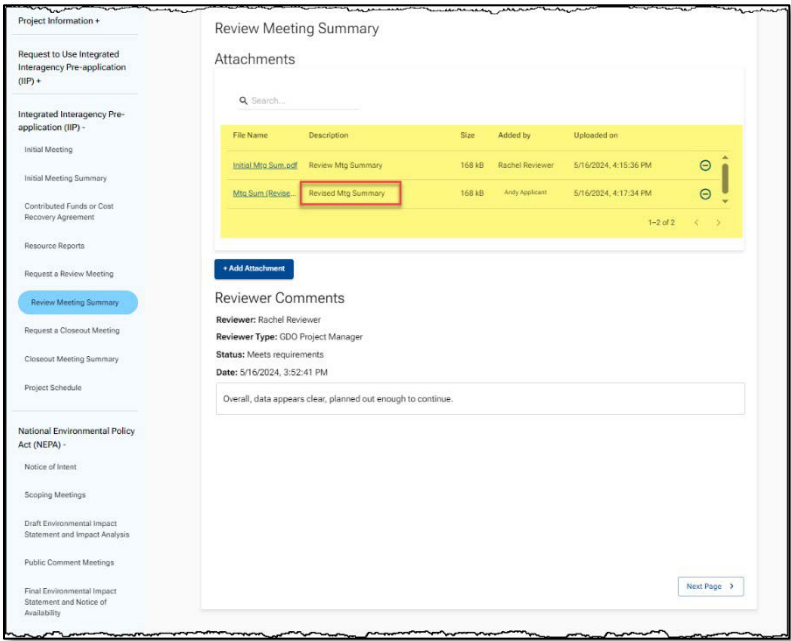
Once the request is marked as **Meets requirements**, DOE will reach out to schedule the IIP Review Meeting.

### 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](mailto: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.

Image 46: Request a Closeout Meeting

The screenshot shows the 'Request a Closeout Meeting' form in the CITAP Portal. The form is divided into several sections: Project Information, Resource Reports, and Reviewer Comments. A red box highlights the instruction: 'Be sure to upload attachments to each section.' The form also displays reviewer information: Rachel Reviewer, GDO Project Manager, Status: Accepted, Date: 5/19/2024, 4:25:35 PM.

Image 47: Without Comments

The screenshot shows the 'Summary Table of Changes' form. The form displays a table of attachments with columns: File Name, Description/comments, Size, Added by, and Uploaded on. The status is 'Meets Requirements'. The table lists two attachments: 'another file.pdf' and 'file.pdf', both uploaded by John Doe on 08/24/2023.

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)**

The screenshot shows the 'Updated Public Engagement Plan' form. The form displays a table of attachments with columns: File Name, Description/comments, Size, Added by, and Uploaded on. The status is 'Deficient'. The table lists two attachments: 'another file.pdf' and 'file.pdf', both uploaded by John Doe on 08/24/2023.

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

Solar Utility Project

Project Information -

Overview

Request to Use Integrated Interagency Pre-application (IIP) +

Integrated Interagency Pre-application (IIP) -

Initial Meeting

Initial Meeting Summary

Contributed Funds or Cost Recovery Agreement

Resource Reports

Request a Review Meeting

Review Meeting Summary

Request a Closeout Meeting

Closeout Meeting Summary

Project Schedule

National Environmental Policy Act (NEPA) -

Notice of Intent

Scoping Meetings

Draft Environmental Impact Statement and Impact Analysis

Projects > Solar Utility Project > Closeout Meeting Summary

Closeout Meeting Summary

A draft closeout meeting summary will be prepared by DOE and shared with the project proponent and relevant Federal and non-Federal entities within 10 days of the meeting. It will include a summary of the meeting discussion, a description of key issues and information gaps identified during the meeting, and any requests for more information from relevant Federal and non-Federal entities.

You must review and provide any corrections within 10 days of DOE sharing the summary. Updated summary notes can be uploaded here. DOE is ultimately responsible for finalizing the summary based on reviewer edits, within 10 days of close of the corrections window.

Attachments

Search...

File Name	Description	Size	Added by	Uploaded on	
<a href="#">Closeout Meeting Summary.pdf</a>	Closeout Mtg Summary	37.2 kB	Andy Appl...	5/21/2024	⌵
<a href="#">Meeting Summary Copy.pdf</a>	C/O Mtg Sum (Revised)	168 kB	Andy Appl...	5/21/2024	⌵

1-2 of 2 < >

+ Add Attachment

Reviewer Comments

Reviewer: Rachel Reviewer

Reviewer Type: GDO Project Manager

Status: Meets requirements

Date: 5/21/2024, 12:40:59 PM

Accepted Revision

Next Page >



# 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

Project Information +

Request to Use Integrated Interagency Pre-application (IIP) +

Integrated Interagency Pre-application (IIP) -

Initial Meeting

Initial Meeting Summary

Contributed Funds or Cost Recovery Agreement

Resource Reports

Request a Review Meeting

Review Meeting Summary

Request a Closeout Meeting

Closeout Meeting Summary

Project Schedule

National Environmental Policy Act (NEPA) +

Project Schedule

DOE must publish as guidance, and update from time to time, a standard schedule that describes the steps generally required to complete decisions on all Federal environmental reviews and authorizations for qualifying projects. The schedule must include recommended timing for each step such that final decisions on all Federal authorizations would be issued within two years of the publication of a notice of intent to prepare an environmental impact statement or as soon as practicable thereafter with consideration of other Federal legal requirements and the need to balance robust analysis with early and meaningful consultation with potentially affected Indian Tribes and public engagement with potentially affected stakeholders and communities of interest.

Attachments

Search...

File Name	Description	Size	Added by	Uploaded on
<a href="#">Schedule.xlsx</a>	Project Schedule	10.1 kB	Andy Appl...	5/21/2024
<a href="#">Schedule - Copy.xlsx</a>	Project Sch (Revised)	10.1 kB	Andy Appl...	5/21/2024

1-2 of 2

+ Add Attachment

Reviewer Comments

Reviewer: Rachel Reviewer

Reviewer Type: GDO Project Manager

Status: Under Review

Date: 5/21/2024, 1:30:15 PM

Revised version meets requirements

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.

[illegible]

## Part 3: Additional resources

- Tutorial video of the CITAP Portal (15-minutes):
  - [https://www.youtube.com/embed/ayWI\\_GYBxA0?si=hldI\\_3woi2OW5zpl](https://www.youtube.com/embed/ayWI_GYBxA0?si=hldI_3woi2OW5zpl)
- About the CITAP Program: <https://www.energy.gov/gdo/coordinated-interagency-transmission-authorizations-and-permits-program>
- Contact us: [citap@hq.doe.gov](mailto: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](https://www.youtube.com/embed/9u6CQ2Zmnb8?si=THp_6s6sZwtpDmOM)