

Caltrans Encroachment Permit System (CEPS) Accounts and Applicants

1. Quick Start

An example: An Employee or Authorized Agent for a utility company applies for a permit using the CEPS portal.

1. Create a CEPS Profile using a unique email address, first and last name, address and phone for contacting. Do NOT use a company name. Select “Employee” as the Contact Type.
2. Click Start an Application when signed into CEPS.
3. Select “Employee” as your “Role” on the application. (An Applicant’s employee should choose Billing Contact if the employee will receive the bills.)
4. Click on Add Applicant and add the Utility Company as the Applicant (role). The Applicant (company) must have a unique email address.
5. If needed, click on Add Applicant to add a Billing Contact (the Applicant will receive bills if there is no Billing Contact).

2. 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 a unique 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 a unique 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.

An individual should sign into CEPS using their own Portal Account when applying on behalf of a company and should not sign in using a Company Portal Account.

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3. 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.

Welcome to the Caltrans Encroachment Permit System

Sign in to view your existing Applications/Permits or click "Start an Application".

Email *

Password *

Remember Me

Sign in

[Forgot Password](#)

Would you like to register as a new user?
[Create a Profile](#)

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

Create a New Profile

Fields with * are required.

Profile Information

Email *

example@example.com

Already have an account? [Log in now](#)

Continue

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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 first and last name and information (not your Company’s name) into the required fields (required fields have an asterisk *). Enter your work or property address and other information as needed. Do not enter your Company’s information for the company’s profile or account.

When finished, click Continue.

Contact Information

Fields with * are Required

Enroll as:
 Individual Company

Contact Type *
[Dropdown menu]

Address 1 *
[Text input field]

Title
[Text input field]

Address 2
[Text input field]

First Name * MI City *
[Text input field] [Text input field] [Text input field]

Last Name * State / Province * Postal / Zip Code *
[Text input field] [Select dropdown] [Text input field]

Mobile Phone Phone *
[Text input field] [Text input field]
(123)456-7890 (123)456-7890

Continue

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4. Create a Company CEPS Account and Profile

Each Company can also create a CEPS Profile / User Account but it is not required. Each Applicant (Company, or Individual) must have a unique email address when being added to the Application.

1. Click on Create Profile

Welcome to the Caltrans Encroachment Permit System

Sign in to view your existing Applications/Permits or click "Start an Application".

Email *

Password *

Remember Me

Sign in

[Forgot Password](#)

Would you like to register as a new user?

[Create a Profile](#)

2. Enter a unique email address for the company and click Continue.

Create a New Profile

Fields with * are required.

Profile Information

Email *

example@example.com

Already have an account? [Log in now](#)

Continue

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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 the choices above

Enter the company’s name and 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 Phone *

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

Continue

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5. 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 current (not suspended).

Contact Type – 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).

Capacity – can change from one application to another

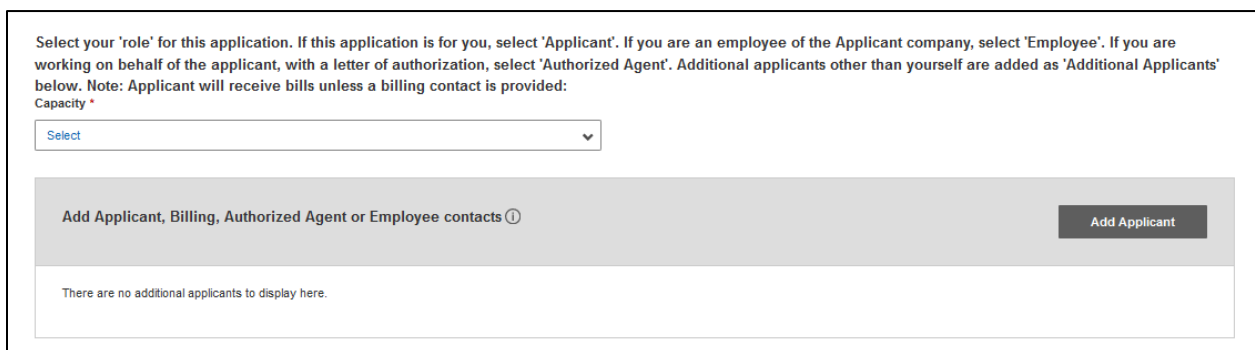
Applicant - Every CEPS application must have an individual or a company with the Capacity of “Applicant” and the Applicant is the responsible party requesting the permit.

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.

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. Sign in with your individual portal account and start an application. Click “Select” under the “Select your role for this application” question and choose “Employee.” If you are an employee of the Applicant, you can also choose “Billing Contact” if you should receive the bills.

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

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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. A unique email is required, but mobile phone is not.

Add Additional Applicant

*Fields with * are required.*

Capacity * ⓘ
Select ▼

Select ⓘ
 Business Individual

Business Name * ⓘ

Address Line 1 * ⓘ Address Line 2 ⓘ

City * ⓘ State * ⓘ Postal Code * ⓘ

Mobile Phone ⓘ (123)456-7890 Phone * ⓘ (123)456-7890

Email ⓘ

Contact Type * ⓘ
Select ▼

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.

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

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.