

California Air Resources Board Cap and Trade Program

Compliance Instrument Tracking System Service (CITSS) Account Management and Transfers Training

California Environmental Protection Agency
 **Air Resources Board**



CITSS Compliance Instrument
Tracking System Service

Introductions

Air Resources Board Representatives

Bob Languell, Market Operations Section

Natalie Lee, Market Operations Section

California Environmental Protection Agency
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 CITSS <small>Compliance Instrument Tracking System Service</small>	
Agenda	
User Registration and Account Application Updates	1:00 – 1:20
User Home Page and Profile Updates	1:20 – 1:50
Entity Profile Management	1:50 – 2:20
<i>Break</i>	
CITSS Accounts Overview	2:30 – 2:40
Transfer Process Overview	2:40 – 3:00
Transfer Examples	3:00 – 3:40
Questions	3:40 – 4:00
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 CITSS <small>Compliance Instrument Tracking System Service</small>	
Compliance Instrument Tracking System Service (CITSS)	
<ul style="list-style-type: none"> • User Registration and Account Application <ul style="list-style-type: none"> • Live in July • Release 2 – Account Management and Transfers <ul style="list-style-type: none"> • Live last week (October 8) • Additional Releases planned <ul style="list-style-type: none"> • Content and schedule to be posted 	
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CITSS

Compliance Instrument
Tracking System Service

CITSS Resources

CITSS User Guide – 3 Volumes

– <http://www.arb.ca.gov/cc/capandtrade/markettrackingsystem/markettrackingsystem.htm>

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User Guide - Volume I
User Registration and
Profile Management

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(CITSS)

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User Guide - Volume II
Account Application and
Account Management

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User Guide - Volume III
Conducting Transfers in the CITSS

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System Service
(CITSS)

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CITSS Resources

California CITSS Help Desk

(916) 324-7659

CACITSSHelpDesk@arb.ca.gov

- Monday through Friday
7:30 a.m. – 5:00 p.m. P.D.T.
- Messages after hours

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CITSS

Compliance Instrument Tracking System Service

ARB Cap-and-Trade Web Page

CITSS

Compliance Instrument Tracking System Service

CITSS User Registration Updates



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CITSS User Registration



- Each individual may have one User ID
- One User may be associated with multiple accounts
- User IDs are not transferrable
- User IDs and Passwords should never be shared

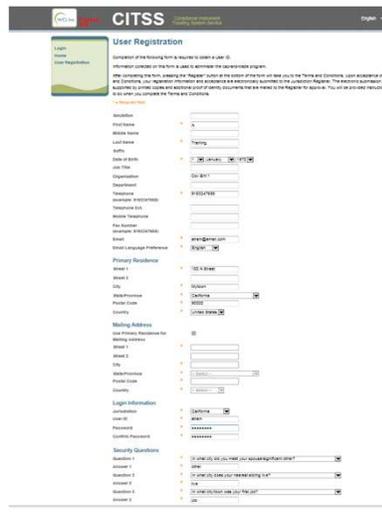




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CITSS User Registration Data Entry



Common Errors and Issues

- Name not legal name as shown on drivers license
- Birthdate errors – dropdown list selection
- Entering business address not personal address in Personal Residence fields
- Each User ID must have a unique email
- Emails provided here are used for account communication



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CITSS Access Info and User Codes

- User IDs
 - Self selected during user registration
 - Found on the User Registration Form (Form #2) printed at the end of the online data entry in the CITSS
- Passwords and Security Questions
 - Self selected during user registration
 - Not printed on any forms
 - Not available to ARB staff
- User Reference Codes
 - Assigned by the CITSS
 - Available on last page of CITSS data entry, all CITSS registration forms, and in every email generated by the CITSS
 - Share this code with others completing account applications and managing accounts

CITSS

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[English](#) • [Français](#)

Forgotten Password

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CITSS Account Application Updates

Account Representatives Page

- Can now designate up to 4 Alternate Account Representatives
- Individual General Market Participant Account Applicants do not require AARs
- Additions and changes can be made on approved accounts

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CITSS Account Application

Account Application: Account Representatives

Account representatives are individuals with the authority to represent the entity in the CITSS and can edit entity information, propose to change representatives, and report the transfer of compliance instruments. Each account must have at least two representatives, the Primary Account Representative (PAR) and the Alternate Account Representative (AAR). The PAR and the AARs must be different individuals. You must designate one PAR and between one and four additional AARs. Account Viewing Agents (AVAs), with limited view only access to your accounts, can be assigned to an account after the account application has been submitted and approved by the Jurisdiction Registrar.

You must designate the account representatives below. An account representative is identified by their unique User Reference Code obtained during individual registration. To ensure that the correct User Reference Code has been entered, you should review the names of the PAR and the AAR on the Review and Submit screen.

Note Regarding General Market Participants - Individuals: Individual account holders are only required to designate themselves as a PAR. For additional account access and security, an individual account holder may optionally designate AARs.

Call your Jurisdiction Help Desk for questions regarding designating account representatives.

Account Representatives:

Primary Account Representative (Required) -No current representative-

Current Representative

Assign Primary Account Representative

I am the Primary Account Representative (PAR)

Select a different registered user as the Primary Account Representative (PAR). Enter the User ID Application Reference Code for PAR:

User ID Application Reference Code for PAR:

Alternate Account Representative(s) -No current representative-

Current Representative(s)

Assign Alternate Account Representative

I am one of the Alternate Account Representative(s) (AAR)

I am not an Alternate Account Representative, or I am an individual account holder and do not wish to add an Alternate Account Representative.

Add additional Alternate Account Representative (AAR) by entering the User ID Application Reference Code below:

User ID Application Reference Code for AAR #1:

User ID Application Reference Code for AAR #2:

User ID Application Reference Code for AAR #3:

User ID Application Reference Code for AAR #4:



CITSS Compliance Instrument
Tracking System Service

User Home Page and Maintaining a User Profile

- User Home Page
 - Accounts
 - Applications
 - Pending Transfers
 - Access to User Information
- Maintaining a User Profile
 - Updating User Information
 - Updating Passwords

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