Environment and Climate Change Canada
Environnement et Changement climatique Canada

CLEAN FUEL REGULATIONS CREDIT AND TRACKING SYSTEM:

USER GUIDE FOR PRIMARY SUPPLIERS, REGISTERED CREATORS AND FOREIGN SUPPLIERS

VERSION 1.1

JULY, 2022

Canada

Foreword

This is the first version of the user guide for primary suppliers, registered creators and foreign suppliers for the Clean Fuel Regulation's Credit and Tracking System (CATS). This document provides guidance to Primary Suppliers, Registered Creators and Foreign Suppliers and their Authorized Agents, Authorized Administrators and Read/Write users on using CATS for the purpose of conducting their report or notice submission activities under the *Clean Fuel Regulations*.

This first version of the CATS platform for CFR will allow the above-mentioned users to create an account in CATS; create and submit a registration report; and create and submit the following applications: recognition of CO2e-Emission-Reduction Project, Approval of Carbon Intensity, and Approval of New Pathway. Administrative functions include adding users and perform other general functions according to the level of permission granted for each user role. More functions are expected in future releases. Questions should be addressed to Environment and Climate Change Canada at the following email address: cfsncp@ec.gc.ca.

Disclaimer

This document does not in any way supersede or modify the Canadian Environmental Protection Act, 1999 or the Clean Fuel Regulations, or offer any legal interpretation of those Regulations. Where there are any inconsistencies between this document and the Act or the Regulations, the Act and the Regulations take precedence.

The full text of the Regulations and associated documents are available on ECCC's website:
https://www.canada.ca/clean-fuel-standard

Should you have questions about the Clean Fuel Regulations, please send them to:
Email: cfsncp@ec.gc.ca

Reference Documents

In addition to the *Clean Fuel Regulations: Credit and Tracking System User Guide for Primary Suppliers, Registered Creators and Foreign Suppliers - Version 1.1*, the following supporting documents for the use of CATS are available to users. References to these documents, if any, in this *User Guide* apply to the most current versions. You may find these documents on the Government of Canada's [Clean Fuel Regulations web page](#), otherwise, click on "Contact us" hyperlink at the bottom of the page to request copies of technical presentations pertaining to the Regulations and supporting documents.

Title and description
Credit and Tracking System (CATS)
Clean Fuel Regulations: Credit and Tracking System User Guide for Primary Suppliers, Registered Creators and Foreign Suppliers - Version 1.1
Clean Fuel Regulations: Credit and Tracking System User Guide for Verification Bodies - Version 1.1
Regulations and Regulatory Impact Analysis Statement
Clean Fuel Regulations
Regulatory Impact Analysis Statement – Clean Fuel Regulations
Verification and Certification
Methods for Verification and Certification
Fuel LCA Model
Specifications for Fuel LCA Model CI Calculations
Clean Fuel Regulations Data Workbook
Quantification Methods
Quantification Method Development Guidance Document
Quantification Method for Low-Carbon-Intensity Electricity Integration
Quantification Method for CO_2 Capture and Permanent Storage
Quantification Method for Enhanced Oil Recovery with CO_2 Capture and Permanent Storage
Generic Quantification Method
Quantification Method for Co-processing in Refineries
Quantification Method for the integration of low-carbon-intensity hydrogen **(will be available this summer 2022)**

Table of Contents

Table of Figures

Definitions

Account means a dedicated space in CATS[1] for a Primary Supplier, a Registered Creator, a Foreign Supplier and Verification Bodies to perform applicable transactions.

Authorized Administrator means an individual, a corporation or any other entity who is authorized to act on behalf of a Primary Supplier, a Registered Creator or/and a Foreign Supplier in CATS. Authorized Administrator has similar Account permissions as the Authorized Agent, including managing obligations of the entity they represent and onboarding of Read/Write Users to the Account. This role may be assigned by the Authorized Agent to one or more Users per Account.

Authorized Agent has the same meaning as section 1 (1) of the CFR[2] and for the purpose of CATS use has full Account permissions including onboarding of all other Users to the Account. Only one User per Account may be assigned this role.

ECCC means the Department of the Environment that is also referred to as Environment and Climate Change Canada.

Foreign Supplier has the same meaning as section 1(1) of the CFR.

Minister means the Minister of the Environment.

Primary Supplier means a person as defined in section 1(1) of the CFR.

Read/Write User means an individual who has been identified and authenticated by the Authorized Agent or the Authorized Administrator of a Primary Supplier, a Registered Creator, or a Foreign Supplier and has been provided with read/write limited access and with ability to propose transactions to Authorized Agent or to Authorized Administrator for approval.

Registered Creator means a person as defined in section 1(1) of the CFR.

Registered Creator by Agreement is a terminology used in CATS to refer to a Registered Creator that has entered into an agreement with a person as defined in subsection 21(1) of the Regulations.

User means

  a. a Primary Supplier, a Registered Creator or a Foreign Supplier or their Authorized Agent, an Authorized Administrator or a Read/Write user,
  b. or a Verification Body or their Authorized Agent or Basic User.

Verification Body has the same meaning than in section 1(1) of the CFR. A Verification Body is mandated by a Primary Supplier, a Registered Creator or a Foreign Supplier to conduct verification activities.

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[1] CATS is the Credit and Tracking System for the Clean Fuel Regulations
[2] CFR is the Clean Fuel Regulations, available from the Canada Gazette, Part II website

1. Introduction

1.1. General Overview

The *Clean Fuel Regulations* (CFR), a key component of Canada's 2030 Emissions Reduction Plan, require producers and importers of gasoline and diesel, called primary suppliers, to reduce the lifecycle carbon intensity of the gasoline and diesel they produce or import in Canada.

The Regulations use a performance-based lifecycle approach and establish a credit market that will incent the use of a broad range of low-carbon-intensity fuels (e.g. ethanol, biodiesel, renewable diesel), energy sources (e.g. hydrogen and electricity) and technologies (e.g. carbon capture and storage).

According to subsection 164(1) of the *Clean Fuel Regulations* (the Regulations), any report or notice that is required to be submitted, must be sent electronically in the form specified by the Minister and must bear the signature of the Authorized Agent. In addition, according to subsection 164(3) of the Regulations, a carbon intensity calculation must also be submitted electronically in the form specified by the Minister[3].

The *Clean Fuel Regulations*' Credit and Tracking System (CATS) is the specified electronic form for these submissions. It is a secure, web accessible platform being developed to enable registration, reporting, credit creations, credit transactions for primary suppliers and registered creators. Foreign suppliers and verification bodies also register in CATS. CATS is accessible at the following web link: https://marchescarbone-carbonmarkets.canada.ca/en/Welcome.

CATS is a platform that has a shared, common access point with the federal Output Based Pricing System and Canada's GHG Offset Credit System. Separate accounts are required in order to register with each program (the same email address can be used for all programs). This manual is specifically for users accessing the *Clean Fuel Regulations*' (CFR) section of CATS, referred to as "CATS" in this document.

1.2. Purpose of this manual

This is the first version of the user guide for primary suppliers, registered creators and foreign suppliers for the *Clean Fuel Regulations*' Credit and Tracking System (CATS). This document provides guidance to Primary Suppliers, Registered Creators and Foreign Suppliers and their Authorized Agents, Authorized Administrators and Read/Write users on using CATS for the purpose of conducting their report or notice submission activities under the *Clean Fuel Regulations*.

This first version of the CATS platform for CFR will allow the above-mentioned users to create an account in CATS; create and submit a registration report; and create and submit the following applications: recognition of CO_2e-Emission-Reduction Project, Approval of Carbon Intensity, and Approval of New Pathway. Administrative functions include adding users and perform other general functions according to the level of permission granted for each user role. More functions are expected in future releases. Questions should be addressed to Environment and Climate Change Canada at the following email address: cfsncp@ec.gc.ca.

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[3] If it is impractical to submit reports or notices electronically in accordance because of circumstances beyond a person's control, the report or notice must be sent on paper, signed by an Authorized Agent, and in the form and format specified by the Minister. In this event, please contact Environment and Climate Change Canada, at cfscats-scsncp@ec.gc.ca for guidance.

The user guide for Verification Bodies is available as a separate document. Refer to **Reference Documents** section for more information.

1.3. Exceptions: required action outside CATS

To carry out the following actions, please contact ECCC at cfsncp@ec.gc.ca:

- The user seeking recognition for a CO_2e-emission-reduction project (example: co-processing) that requires approval of a new pathway (for carbon intensity from the Fuel LCA Model) or a carbon intensity for a low-carbon-intensity fuel, material input or electricity.

- The user is applying for approval for a new pathway for electricity.

- The organization is a carbon intensity contributor and wishes to register under the *Clean Fuel Regulations.*

2. Introduction to CATS

2.1. Designating the Authorized Agent

The first step of creating an account in CATS for the *Clean Fuel Regulations* consists of designating an Authorized Agent to act on behalf of a Primary Supplier, a Registered Creator or a Foreign Supplier.

As defined in the *Clean Fuel Regulations*:

Authorized Agent means,

(a) in respect of a corporation, any officer of the corporation who is authorized to act on its behalf;

(b) in respect of an individual, that individual or any person authorized to act on behalf of that individual; and

(c) in respect of any other entity, any person authorized to act on behalf of that entity.

The Authorized Agent is the first user to register in CATS by creating an account.

Refer to **section 3.5** for further information and requirement on documents to submit upon registration.

2.2. Accessing and Logging in to CATS

The latest versions of browsers such as Firefox, Microsoft Edge, Google Chrome, and Safari support CATS; however, Internet Explorer does not.

If you <u>have not</u> created a CATS account for CFR, follow the registration steps in **section 3** to create a CFR account.

If you already have CATS login credentials for CFR but the registration has not been completed (i.e. full access to CATS has not been granted, due to documents not submitted and registration report information not completed), follow the registration steps starting in **section 3.1**, step 9.

Otherwise, for approved and active accounts, follow the steps below to log in to CATS.

1. Navigate to CATS via this link: https://marchescarbone-carbonmarkets.canada.ca
2. Select **Login**
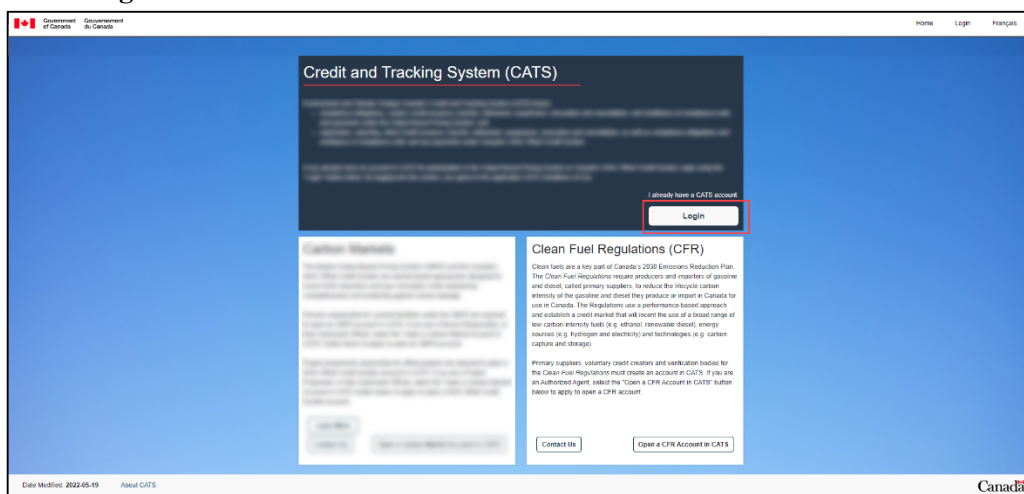
Figure 1: Login for CATS existing users

3. On the **Choose a Secure Sign-In Method** page, choose the same option as initially selected upon the account creation (**Figure 7**). Each user must use their own sign-in method and credentials must not be shared.

4. Enter the Two-Factor Authentication Code sent to your email on file (or by SMS) and select **Sign-In** (**Figure 8**).

   The two-factor authentication code is valid for 3 minutes. After that time users will have to select **Resend Code**.

2.3. User Roles and Permissions

Within CATS, various user roles have different permissions associated with them. Organizations authorize and onboard their own users, and must ensure to assign the correct role for individuals acting on their behalf.

ACTIVITY	ROLE		
	AAG	AAD	Read/Write
Initiate creation of account	✓		
Add an Authorized Administrator	✓		
Submit Registration Report	✓		
Request to cancel an account (organization withdrawing from CFR)	✓		
Add read/write users	✓	✓	
Execute transactions and approve transaction proposed by read/write users	✓	✓	
Submit applications	✓	✓	
Delete/request cancellation of regulatory reports/applications	✓	✓	
Create/sign/submit agreement to create credits	✓	✓	
View/write/download reports/application	✓	✓	✓
Propose transactions for approval			✓
Submit Identity document (not applicable to Foreign Suppliers)	✓		
Submit Authorization document	✓	✓	
AAG = Authorized Agent; AAD = Authorized Administrator			

Figure 2: User Roles and Permissions

2.3.1 Authorized Agent (AAG)

The Authorized Agent acts on behalf of the organization and has the full account permissions. This is the main user role and the first role that is created for an organization upon the first instance of registration. There can only be one Authorized Agent representing the organization.

For Primary Suppliers, Registered Creators and Foreign Suppliers, the Authorized Agent's full account permissions allow to:
- Submit a registration report.
- Add an Authorized Administrator.
- Request to cancel an account (organization withdrawing from CFR).
- Perform the same activities as the Authorized Administrator.

The Authorized Agent is the only user that must go through the identity authentication process, providing the identity verification document (not applicable to the Authorized Agent of Foreign Suppliers). This step is part of the registration process. When the registration report is submitted in CATS, the Authorized Agent must also upload a letter of authorization before requesting participation in CATS. More information on these documents is available in appendixes **Appendix A: Identity Verification Document** and **Appendix B: Authorization Document**.

The letter of authorization and identity verification document must be submitted prior to approval for full access to CATS, but do not affect the effective date of credit creation.

2.3.2 Authorized Administrator (AAD)

The Authorized Administrator has similar account permissions as the Authorized Agent. This role may be assigned by the Authorized Agent to one or more users per account. The Authorized Administrator's account permissions allow to:

- Add read/write users.
- Execute and approve transactions proposed by read/write users.
- Submit applications.
- Delete/request cancellation of regulatory reports/applications.
- Create/sign/submit agreement to create credits.

2.3.3 Read/Write User

The Read/Write User is provided with the read/write limited access and with ability to propose transactions to Authorized Administrator or Authorized Agent. This role may be assigned to one or more users per account. The Read/Write user's account permissions allow to:

- View, write and download reports/application.
- Propose transactions for approval.

2.4. Communicating with ECCC

One of the following options will be used by ECCC to communicate with users:

- Automated CATS notification emails that send administrative information or notices from CATS
    - Email address: scscnepasrepondre-catsnoreply@ec.gc.ca
    - Please add to safe sender list
    - DO NOT REPLY

- CFR Operations Office for communications with ECCC about using CATS
    - Email address: cfscats-scscncp@ec.gc.ca Please add to safe sender list
    - 1-833-849-9160

2.5. Usability Tips

In any of the screens in CATS, users can zoom in by pressing CTRL + or zoom out by pressing CTRL -.

Where the content does not fit the page, scroll bars will appear on the right hand side of their browser, as well as at the bottom of pages.

3. Creating an Account in CATS and submitting Registration Reports

This section applies to new users who do not have a CATS account for CFR and for existing users who have not completed their identity authentication and registration, and received full access to CATS. For existing users, return to section **2.2 Accessing and Logging in to CATS** for information to log in to CATS.

Before opening a CFR account in CATS, ensure that:
- Organization is a Primary Supplier, a Registered Creator or a Foreign Supplier as defined in the *Clean Fuel Regulations*;
- User has been authorized to act on behalf of the organization as an Authorized Agent;
- Authorized Agent has obtained or initiated the process of obtaining the Authorization Letter and Identity Verification Document as applicable to the organization role.

3.1. Creating an account in CATS

The following steps must be performed for registering in CATS as a Primary Supplier, a Registered Creator or a Foreign Supplier.

Only the Authorized Agent may register an organization account.

To create an organization account in CATS, the Authorized Agent must perform the following steps:
1. Navigate to CATS via this link: https://marchescarbone-carbonmarkets.canada.ca
2. Select **Open a CFR Account in CATS**.
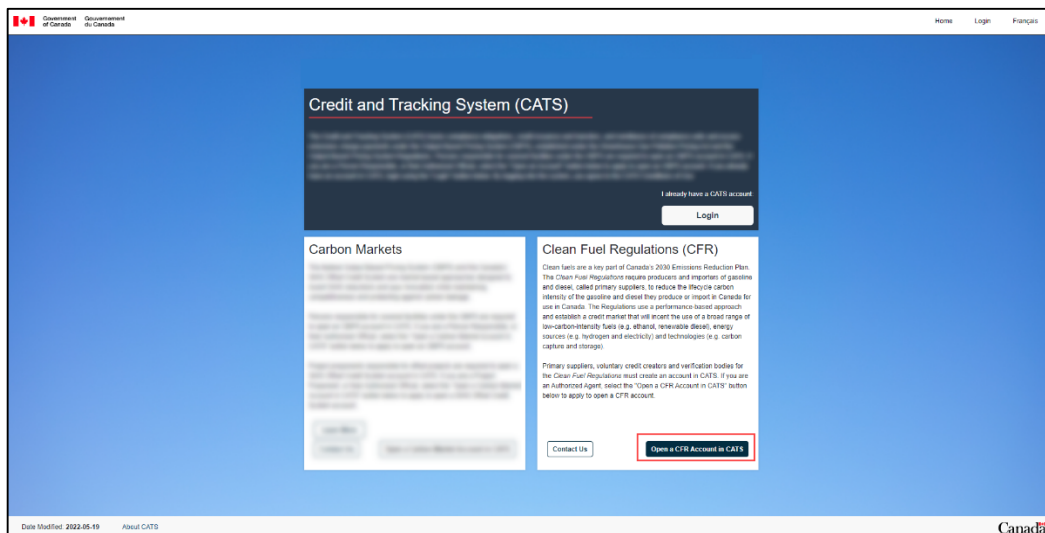
Figure 3: CATS Home Page

3. **Select** the organization role Primary Supplier, Registered Creator, Foreign Supplier option as illustrated below.

   Steps for Verification Bodies can be found in a separate user Guide listed in **Reference Documents** section.

Figure 4: Selecting Primary Supplier/Registered Creator/Foreign Supplier Organization Role

4. Enter the requested information in the next screen (*mandatory fields are marked by an asterisk **):

- Organization information, including postal/mailing address.

  Business Registration Number (CRA BN) is not mandatory but is highly suggested in order to accelerate the organization approval process.

- Authorized agent contact information.

- Authorized agent business postal/mailing address

If applicable, the user has the option to select **Same as Organization Address?** box and avoid entering the same information again.

NOTE: If some sections become greyed out and user is unable to continue entering the information, click on/off the **Same as…**? boxes in different sections on the same page.

- Before proceeding to the next step, the user must ensure that the entered information is accurate and does not contain errors. Verify the email address and Authorized Agent information as there will be no prompt sent for notification if a typographical error or wrong email address is entered.

- Select **Proceed to Next Step** at the bottom of the page.

Figure 5: Primary Supplier/Registered Creator/Foreign Supplier Account Registration

5. The user now has the option to **Continue** with the registration process or close the page and complete the registration process within the next 24 hours by clicking on the link provided in the email.

Figure 6: Secure Sign-In

6. Choose the preferred method of secure login

The chosen method will be used <u>each time</u> the user logs in to CATS.

- Use a Sign-In partner or GCKey.

   - **Sign-In Partner**: uses the same sign-in information used for other online services (e.g. online banking). None of user's information will be shared with CATS.

- **GCKey**: requires users to create an account, password and recover questions. The GCKey can be used to access multiple Government of Canada online enabled services. More information on this service can be found here.

To proceed with the GCKey option, select **Continue to GCKey** > **Sign Up** and follow the instructions on the screen.

NOTE: Each user must use their own sign-in method and credentials must not be shared.
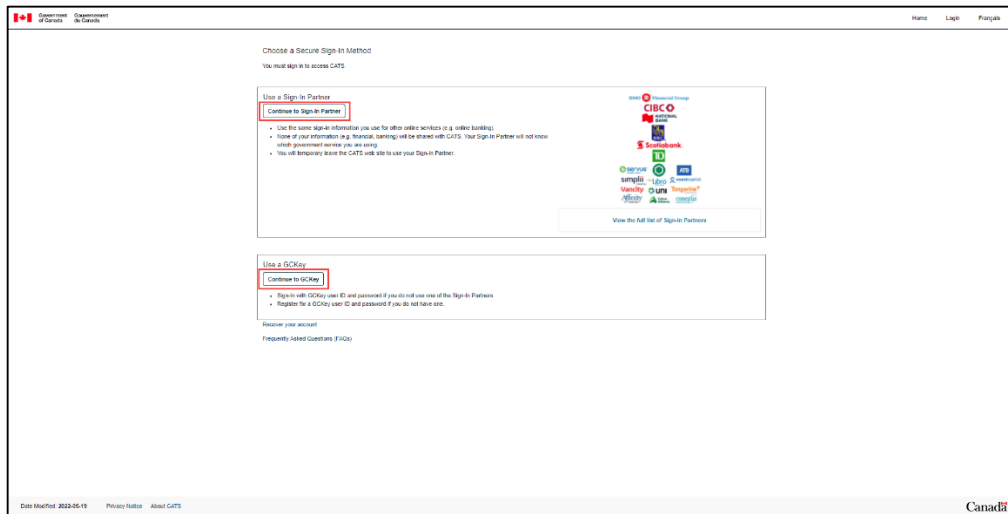
Figure 7: Secure Login Method

7. Enter the Two-Factor Authentication Code received by email and select **Sign In**.

The two-factor authentication code is valid for 3 minutes. After that time, users will have to select **Resend Code** option.
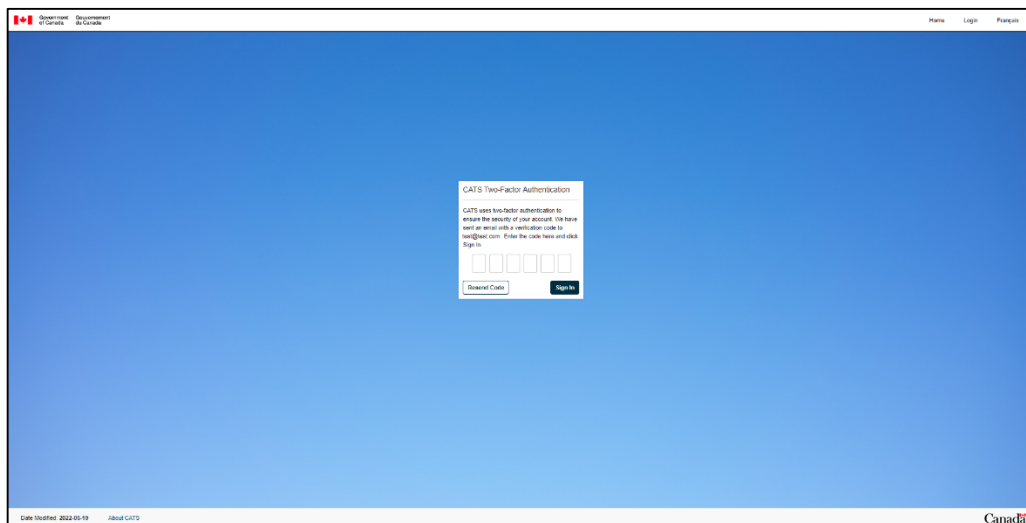
Figure 8: Two-Factor Authentication Code

8. Accept the Conditions of Use

All users must read and accept the Conditions of Use before the access to CATS is allowed.

- To accept, select **Accept**. A success message will be displayed.
- To refuse, select **Log out**. Users will not be able to perform any actions in CATS.
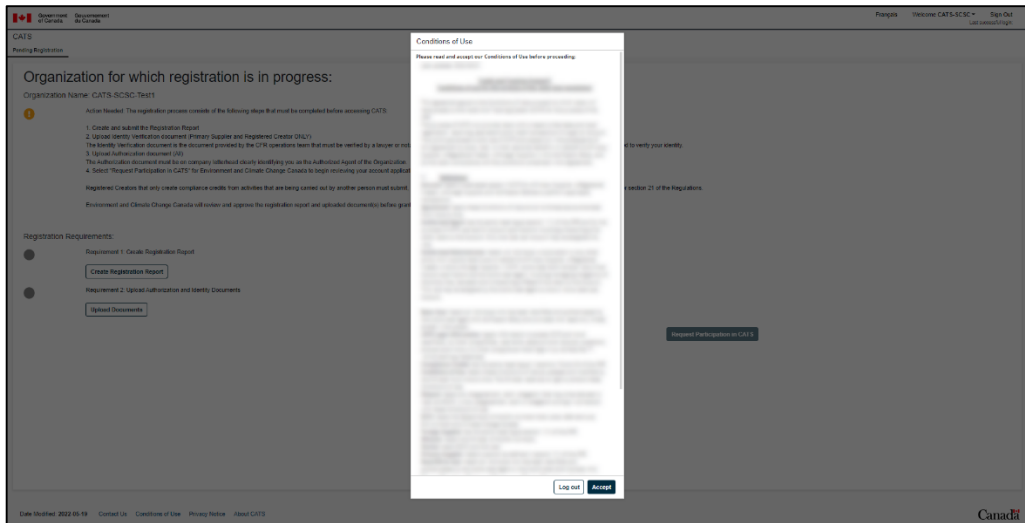
Figure 9: Accepting Conditions of Use

9. Partial access to CATS

Once the Conditions of Use have been accepted and the Success message displayed, the user has partial access to CATS. The on-screen information indicates that the following steps must be completed before accessing CATS:

- Creation of the Registration Report (**section 3.2**)
- Uploading of the Agreement to create credits, if applicable (**section 3.4**)
- Uploading of required identity documents (**section 3.5**)
- Requesting Participation in CATS as a Primary Supplier, Registered Creator or Foreign Supplier (**section 3.6**)

Upon completion of all the required steps, Environment and Climate Change Canada will review the registration report and uploaded documents before granting full access to CATS.
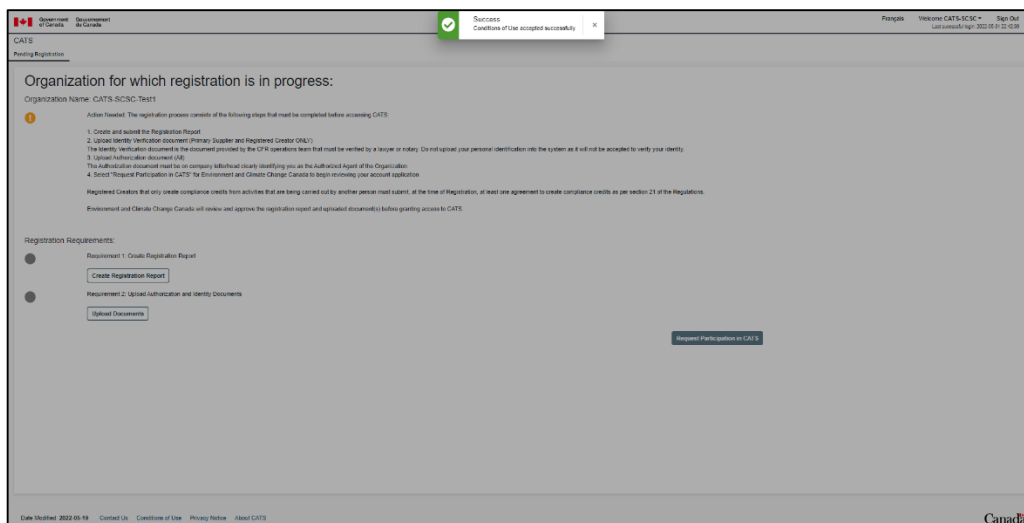
Figure 10: Partial access to CATS

3.2. Creating a Registration Report

The creation of a Registration Report consists of the following five on-screen steps prompting the user to:
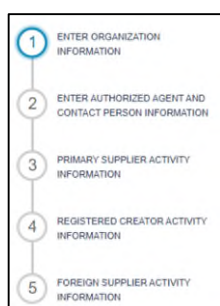
- enter organization information
- enter Authorized Agent and contact person information
- enter Primary Supplier activity information
- enter Registered Creator activity information
- enter Foreign Supplier activity information

NOTE: To ensure that the entered information is correctly saved, do not click on buttons (1-2-3-4-5) located on the left-hand side of the screen (illustrated above). Navigating through the five steps must be done by clicking on **Proceed to Next Step** button at the bottom of the page.

1. Select **Create a Registration Report**.

Figure 11: Create a Registration Report

2. **STEP 1:** Enter organization information and click **Proceed to Next Step** button.

Certain information is already automatically transferred from the initial account creation step.

At any stage during the creation of the registration report, the user may select **Save as Draft** and logout of CATS. Upon logging in, the user will have the ability to continue the process.

Figure 12: Entering organization information

3. **STEP 2:** Enter Authorized Agent and contact person information and click **Proceed to Next Step** button.

NOTE: If some sections become greyed out and user is unable to continue entering the information, click on/off the **Same as…**? boxes in different sections on the same page.

Figure 13: Entering Authorized Agent and contact person information

4. **STEPS 3-4-5** determine the organization role: Primary Supplier, Registered Creator or Foreign Supplier. An organization can have one or more roles.

   ▪ For each of the steps on the left-hand side of the screen (3-4-5), a definition is provided on the screen allowing the user to determine if the step is applicable or not to their activities.

   ▪ If the step is applicable, additional sub-steps will be displayed.

   ▪ If the step is not applicable, user must select the second radio button to proceed to next organization role:
      o Organization is not a Primary Supplier (Step 3); or
      o Organization does not intend to create compliance credits (Step 4); or
      o Organization is not a Foreign Supplier (Step 5).

3.2.1 Registering as a Primary Supplier (STEP 3)

a) If Primary Supplier is selected in this step as shown in the figure below, additional steps are displayed on the left-hand side of the screen.

Figure 14: Registering as a Primary Supplier

b) If your organization produces gasoline or diesel follow the steps below:

Figure 15: Primary Supplier - Gasoline or Diesel Production

1. Confirm your organization produces gasoline or diesel.
2. If the answer is yes, select **+Add Facility** where gasoline or diesel is produced. Add multiple facilities if applicable.
3. Select **Add New Facility** radio button for a new facility not yet entered in CATS.

   Choose from my facilities: select this option when the activity takes place at a facility already registered in CATS. For example, if a gasoline production facility starts creating low-carbon-intensity fuel, or multiple activities are carried out at the same facility this option would be selected.

4. Enter the requested information for each facility in your organization.

5. Select all the fuels that are produced at the facility.
6. Select **Proceed to Next Step** button.

c) If your organization imports gasoline or diesel, follow the steps below:

Figure 16: Primary Supplier - Gasoline or Diesel Import

1. Confirm your organization imports gasoline or diesel.
2. If the answer is yes, from the drop-down menu select the province or territory where the fuel is imported into.
3. Select **+Add Selected Province/Territory** for as many provinces/territories that the fuel is imported into.
4. Select the fuel types imported into that province.
5. Select **Proceed to Next Step** button.

d) This completes the Primary Supplier section (**STEP 3**)

3.2.2 Registering as a Registered Creator (STEP 4)

If Registered Creator (**Organization intends to create compliance credits** radio button) is selected in this step as shown in the **Figure 17** below, additional steps are displayed on the left-hand side of the screen.

For each of these additional steps, except for Import of Low-CI Fuel, a checkbox referencing subsection 21(1) of the Regulations will be displayed and needs to be selected, if applicable, in order to proceed to the Agreement to create credits steps. Registered Creators that create compliance credits from activities that are being carried out by another person must submit, at the time of the registration, at least one agreement to create compliance credits. Refer to **section 3.2.2.6** for further guidance.

Figure 17: Registering as a Registered Creator

3.2.2.1. CO$_2$e Emission-Reduction Project

a) If your organization intends to create compliance credits by carrying out a CO$_2$e emission-reduction project, follow the steps below.

Figure 18: Registered Creator - CO$_2$e Emission-Reduction Project

1. Confirm your organization carries out CO$_2$e emission-reduction projects.

2. If the answer is yes, select +**Add Facility/Equipment**.

3. Select the appropriate radio button for **Facility** or **Equipment**.

4. The three options to select for your facility or equipment are:

- **Add New Facility** or **Equipment**: for a new facility or equipment.

- **Choose Existing Facility** (or **Equipment**) **Registered by Another Organization**: for a facility or equipment entered by another organization. This option is specific to Subsection 21(1) Agreements to create credits.

- **Choose from my facilities** (or **equipment**): for a facility or equipment that your organization previously entered. For example, one of your diesel or gasoline fuel production facilities also carries out activities to create credits, instead of entering the information again for a given facility, user would be able to select it.

5. Enter the required information for your facility or equipment.

6. If the facility or equipment is subject to an agreement to create credits, the checkbox referencing subsection 21(1) of the Regulations needs to be selected in order to proceed to the Agreement to Create Credits steps.

   If you have an agreement, please refer to **section 3.2.2.6** to select the applicable option.

7. Select **Proceed to Next Step** button.

3.2.2.2.   Production of Low CI Fuel

a) If your organization intends to create compliance credits by producing low-carbon-intensity fuel for use in Canada, follow the steps below:

Figure 19: Registered Creator - Production of low-carbon-intensity fuel

1. Confirm your organization carries out production of low-carbon-intensity fuel.

2. If the answer is yes, select **+Add Facility**.

3. The three options to select from are:

   - **Add New Facility**: for a new facility.

   - **Choose Existing Facility Registered by Another Organization**: for a facility entered by another organization. This option is specific to Agreements to create credits.

   - **Choose from my facilities**: for a facility that your organization has previously entered. For example, one of your diesel or gasoline fuel production facilities also carries out activities to create credits, instead of entering the information again for a given facility, user would be able to select it.

4. Enter the required information for your facility.

5. If the facility is subject to an agreement to create credits, the checkbox referencing subsection 21(1) of the Regulations needs to be selected in order to proceed to the Agreement to Create Credits steps.

   If you have an agreement, please refer to **section 3.2.2.6** to select the applicable option.

6. Select the applicable fuel types. If **Other Low-Carbon Intensity Fuel** is selected and one of the following fuels is being produced at the facility, please use the same text as below:
   - Cellulosic Ethanol,
   - Low-carbon-intensity fuel that is suitable for use in aviation.

7. Select **Proceed to Next Step** button.

3.2.2.3. Production of Biogas to Produce Electricity

a) If your organization intends to create compliance credits from the production of biogas for use in equipment to produce electricity, follow the steps below:

Figure 20: Registered Creator - Production of biogas to produce electricity

1. Confirm your organization carries out activities related to the production of biogas to produce electricity.

2. If the answer is yes, select **+Add Facility**.

3. The three options to select for your facility are:

   ▪ **Add New Facility**: for a new facility.

   ▪ **Choose Existing Facility Registered by Another Organization**: for a facility entered by another organization. This option is specific to Agreements to create credits.

   ▪ **Choose from my facilities**: for a facility that your organization has previously entered. For example, one of your diesel or gasoline fuel production facilities also carries out biogas production activities to create credits, instead of entering the information again for a given facility, user would be able to select it.

4. Enter the required information for your facility.

5. The **Description of equipment used** field is not required to be completed.

6. If the facility is subject to an agreement to create credits, the checkbox referencing subsection 21(1) of the Regulations needs to be selected in order to proceed to the Agreement to Create Credits steps.

   If you have an agreement, please refer to **section 3.2.2.6** to select the applicable option.

7. Select **Proceed to Next Step** button.

3.2.2.4. Import of Low CI Fuel

a) If your organization imports low-carbon-intensity fuels, follow the steps below.

Figure 21: Registered Creator - Import of Low-Carbon-Intensity Fuel

1. Confirm your organization imports low-carbon-intensity fuel.

2. If the answer is yes, from the drop-down menu select the province or territory where fuel is imported.

3. Select +**Add Selected Province/Territory**.

4. Select the fuel type imported into that province. If **Other Low-Carbon Intensity Fuel** is selected and one of the following fuels is being produced at the facility, please use the same text as below:
   ▪ Cellulosic Ethanol,
   ▪ Low-carbon-intensity fuel that is suitable for use in aviation.

5. Select **Proceed to Next Step** button.

3.2.2.5. Supplies fuel(s) or energy sources to vehicles

a) If your organization intends to create compliance credits by supplying fuel(s) or energy sources to vehicles follow the steps below:

Figure 22: Registered Creator - Supplies Fuel(s) or energy sources to vehicles (Fuelling Station)

1. Confirm your organization supplies fuel(s) or energy sources to vehicles.

2. If the answer is yes, select one of the four options:
    - **Add Fuelling Station**.
    - **Add Charging-site Host**.
    - **Add Charging-network operator - general public charging station**.
    - **Add Charging-network operator - residential charging station**.

3. If selecting a fuelling station, select either **Fuelling Station** or **Hydrogen Fuelling Station**.

    If selecting any of the other options (charging activity), skip to step 5.

4. Enter all the required information for fuelling/hydrogen fuelling station.

5. Select all applicable fuel types.

    If any charging activity is selected at step #2, user is prompted to select the province/territory in which the specified activity occurs (**Figure 23**).

6. If the fuelling station or charging activity is subject to an agreement to create credits, the checkbox referencing subsection 21(1) of the Regulations needs to be selected in order to proceed to the Agreement to Create Credits steps.

    If you have an agreement, please refer to **section 3.2.2.6** to select the applicable option.

7. Select **Proceed to Next Step** button.

Figure 23: Registered Creator - Supplies Fuel(s) or energy sources to vehicles (Charging activity)

b) This completes the Registered Creator section (**STEP 4**)

3.2.2.6.   Subsection 21(1) - checkbox

According to subsection 21(1) of the Regulations:

A registered creator may, before they have created any provisional compliance credits, enter into an agreement to create compliance credits for a compliance period
   a) with a person who is carrying out a CO_2e-emission-reduction project described in section 30 or a person who is referred to in subsection 98(1), 99(1), 101(1), 102(1) or 104(1); or

   b) with a producer who is referred to in subsection 94(1), 95(1), 96(1) or 100(1), if the agreement applies only to the creation of compliance credits through the production of a quantity or low-carbon-intensity fuel in Canada.

In CATS, that person entering in the agreement with the Registered Creator is referred to as Other Party to the Agreement. To generate an agreement, the checkbox **The credit creation activity is being carried out by another person and is subject to an agreement to create compliance credits as per subsection 21(1) of the Regulations** must be selected and the user is prompted to select one of the tree radio buttons displayed on the screen:

- **Other Party to the Agreement is not registered in CATS**
   For this option to be selected, the Other Party to the Agreement is not registered in CATS and all the information related to the facility/equipment or fuelling stations/charging activities must be entered manually on behalf of the Other Party to the Agreement. The generated agreement form will have to be provided to the Other Party to the Agreement for signature and the signed copy will need to be uploaded to CATS.

- **Other Party to the Agreement already registered in CATS**
   For this option to be selected, the Other Party to the agreement must already be registered in CATS and all information will be auto-populated. The organization ID must be entered for the system to link the facility/equipment/fuelling stations/charging activities to your account and the

Other Party to Agreement organization name will be displayed in order to confirm the information. The generated agreement form will be provided to the Other Party to the Agreement for electronic signature and approval within CATS.

▪ **Choose from my list of Other Party to the Agreement.**
For this option to be selected, the Other Party to the agreement must already be linked to the account and have multiple facility/equipment/fuelling stations/charging activities from which to chose via the drop-down menu.

The sections below provide guidance for each option.

3.2.2.6.1 Other Party to the Agreement is not registered in CATS

If the **Other Party to the Agreement is not registered in CATS** radio button has been selected, follow the steps below.

Figure 24: Other Party to the Agreement is not registered in CATS

1. Enter all the required information for the applicable facility/equipment/fuelling stations/charging activities.

2. Enter information in the **Organization Name (Other Party to Agreement)** field.

3. Select **Proceed to Next Step** until the registration report is completed.

3.2.2.6.2 Other Party to the Agreement already registered in CATS

If the **Other Party to the Agreement already registered in CATS** radio button has been selected, follow the steps below.

Figure 25: Other Party to the Agreement already registered in CATS

1. Enter all the required information for the applicable facility/equipment/fuelling stations/charging activities.

2. Enter the Organization ID in the **Organization ID of the Other Party to Agreement** field.

3. Select **Search**.

4. The Other Party to the Agreement Organization Name is displayed and greyed out.

   If the displayed information is not providing the expected result, please communicate with the Other Party to the Agreement and verify the Organization ID provided and try again.

5. If the step 4 has been completed successfully, select **Proceed to Next Step** until the registration report is completed.

3.2.2.6.3 Choose from my list of Other Party to the Agreement

If **Choose from my list of Other Party to the Agreement** radio button has been selected, follow the steps below.

Clean Fuel Regulations Credit and Tracking System: User Guide for Primary Suppliers, Registered Creators and Foreign Suppliers – v. 1.1

35

Figure 26: Choose from my list of Other Party to the Agreement

1. Enter all the required information for the applicable facility/equipment/fuelling stations/charging activities.

2. From the **Organization Name (Other Party to Agreement)** drop-down menu, select the applicable Organization name.

3. Select **Proceed to Next Step** until the registration report is completed.

3.2.3   Registering as a Foreign Supplier (STEP 5)

a) If Foreign Supplier is selected in this step as shown in the figure below, an additional step is displayed on the left-hand side of the screen prompting the Production of Low CI Fuel screen.

Figure 27: Registering as a Foreign Supplier

Figure 28: Foreign Supplier - Production of low-carbon-intensity fuels

b) If your organization produces low-carbon-intensity fuels, follow the steps below:

1. Select **Add Facility**.
2. Enter all required information.
3. Select all liquid and gaseous applicable fuels.

   If **Other Low-Carbon Intensity Fuel** is selected and one of the following fuels is being produced at the facility, please use the same text as below:
   - Cellulosic Ethanol,
   - Low-carbon-intensity fuel that is suitable for use in aviation.

3.3. Submitting the Registration Report

As this is the last step of the registration report process, select **Submit Registration Report** button.

A success message is displayed and a green check mark indicates that the first requirement has been completed (**Figure 29**).

If the checkbox referencing subsection 21(1) of the Regulations has been selected in any of steps in **section 3.2.2 Registering as a Registered Creator (STEP 4)**, prior to the success message, a confirmation message will be displayed informing the user that at least one agreement will need to be submitted prior to requesting participation in CATS. Once the user selects **OK** (**Figure 30**), the success message will display confirming the submission of the registration report and an added requirement will be displayed under **Registration Requirements**.
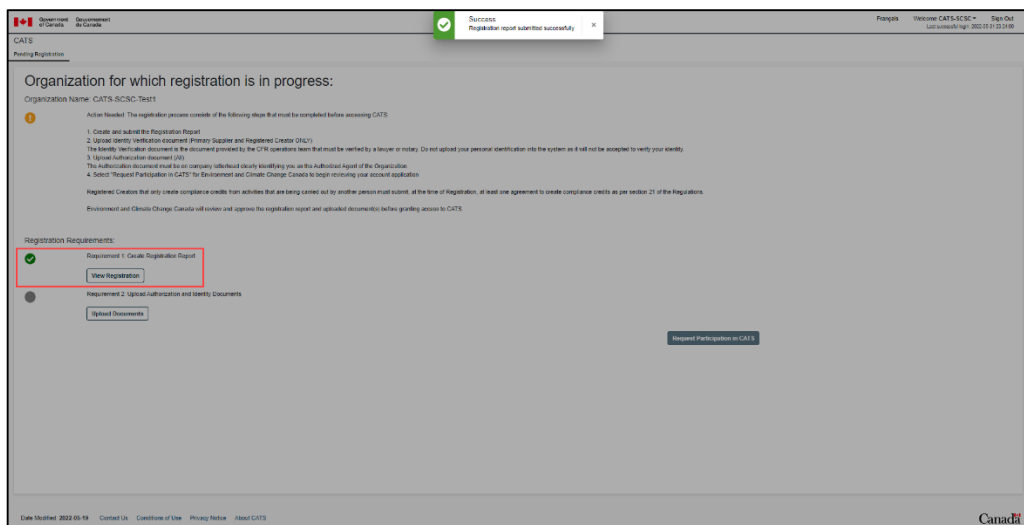
Figure 29: Registration Report Submitted
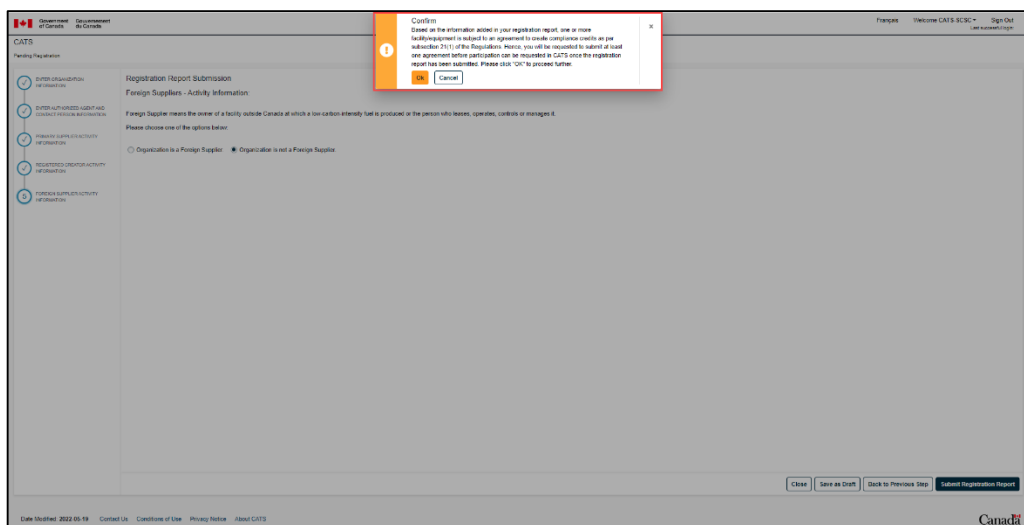
Figure 30: Registration Report - Confirmation message agreement required

Once the registration report has been submitted to ECCC, the user will receive an email notification confirming the submission of the registration report. The user may continue the registration process or logout and complete the remaining requirements at a later time.

3.4. Creating an Agreement to Create Credits

As indicated in **section 3.2.2**, users having selected a checkbox referencing subsection 21(1) of the Regulations during the registration process are prompted to create an Agreement to Create Credits.

The creation of the Agreement consists of the following four on-screen steps prompting the user to:
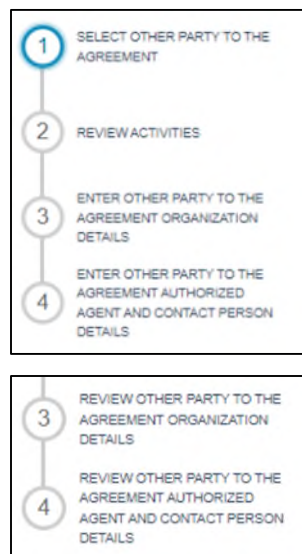
- ▪ Select other party to the agreement
- ▪ Review activities
- ▪ Enter/Review other party to the agreement organization details
- ▪ Enter/Review other party to the agreement Authorized Agent and contact person details

The process (Steps 3-4) will slightly defer based on one of the two scenarios:

- ▪ Other Party to the Agreement is not registered in CATS.
- ▪ Other Party to the Agreement is already registered in CATS.

To begin the process:
a) Select **Create Agreement** (**Figure 31**).
b) A new page will be displayed, select **Create New Agreement** (
c) **Figure** 32).

Figure 32: Create New Agreement to Create Credits

d) **STEP 1**: Select the Other Party to the Agreement

Figure 33: Agreement to Create Credits - Select Other Party to the Agreement (STEP 1)

1. From the drop-down menu, select the compliance period for which the agreement is being created.

2. Enter the Agreement Identifier or Name.

3. Confirm the selection with the radio button.

4. Select **Proceed to Next Step**.

e) **STEP 2:** Review the details of the agreement and select **Proceed to Next Step**. To correct any erroneous information, the user may return back to the registration report by selecting **View Registration Report**, correct the information and submit the registration report again.

Figure 34: Agreement to Create Credits - Review Activities (STEP 2)

If the Other Party to the Agreement is already registered in CATS, proceeding to the next step at this stage will display a confirmation message indicating that the Agreement to Create Credits will be auto-generated. Select **OK** and **Proceed to Next Step**.

Figure 35: Agreement to Create Credits - Other Party Registered in CATS - Review Activities (STEP 2)

f) **STEP 3**: Enter or review the required information.

1. If the Other Party to the Agreement is not registered in CATS, the Registered Creator will have to enter the organization information on their behalf and select **Proceed to Next Step**.

Figure 36: Agreement to Create Credits - Enter Other Party Organization Details (STEP 3)

2. If the Other Party to the Agreement is registered in CATS, the information will be pre-populated. Review the organization information and select **Proceed to Next Step**.

Figure 37: Agreement to Create Credits - Review Other Party Organization Details (STEP 3)

g) **STEP 4**: Enter or review the required information.

1. If the Other Party to the Agreement is not registered in CATS, the Registered Creator will have to enter the Authorized Agent and contact person information on their behalf and select **Submit and Generate Agreement**. A confirmation message will be displayed, select **OK** to proceed to the next step.

Clean Fuel Regulations Credit and Tracking System: User Guide for Primary Suppliers, Registered Creators and Foreign Suppliers – v. 1.1

42

Figure 38: Agreement to Create Credits - Submit and Generate Agreement (STEP 4)

2. If the Other Party to the Agreement is registered in CATS, the information will be pre-populated. Review the Authorized Agent and contact person information and select **Generate Agreement and Submit to Other Party to the Agreement**. A confirmation message will be displayed, select **OK** to proceed to the next step.

Figure 39: Agreement to Create Credits - Generate Agreement and Submit to Other Party (STEP 4)

3.4.1 Other Party to the Agreement not registered in CATS - Upload Agreement

a) After having generated an agreement in the previous step, the user will be presented with an option to **Download Agreement** or **Print Agreement**. Once completed, select **Close** to proceed to the next page where the agreement can be found. The agreement must be signed by both parties and uploaded to CATS.
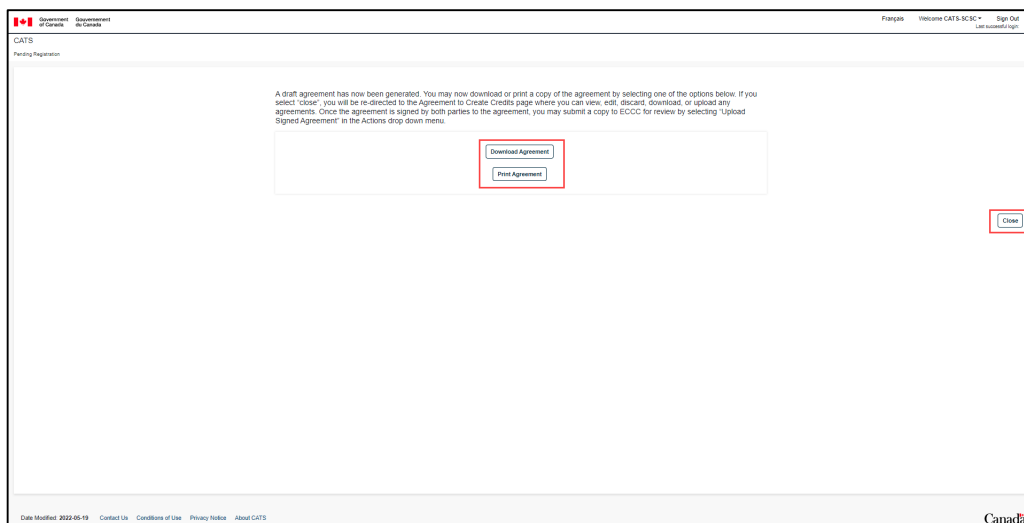
Figure 40: Agreement to Create Credits - Download/Print for signature

b) Once the agreement has been signed by both parties, upon logging back in to CATS, the user must click on the requirement action **Create Agreement** (**Figure 31**) in order to access the Agreement to Create Credits page.

At this step, select **Actions** > **Upload Signed Agreement**.
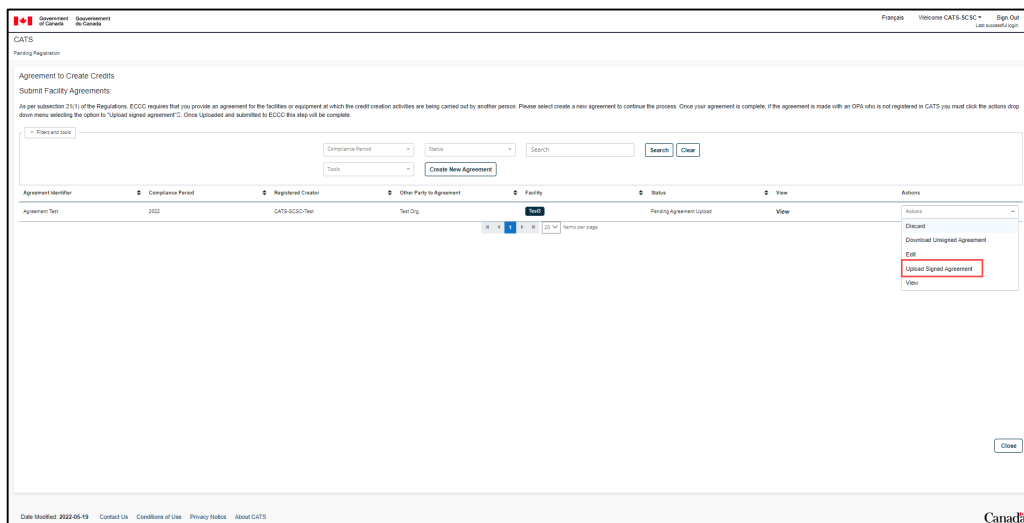
Figure 41: Agreement to Create Credits - Actions menu - Upload Signed Agreement

c) Select **Upload Document** and browse to select the file

Uploading of documents can be achieved by selecting **Upload Document** blue button or by selecting specific **Upload Document** link to a document type. OTHER document type option is available from the drop-down menu for any other relevant documents to be uploaded.

NOTE: As the documents are being uploaded and scanned by the system, a loading icon will be displayed until the upload is completed.
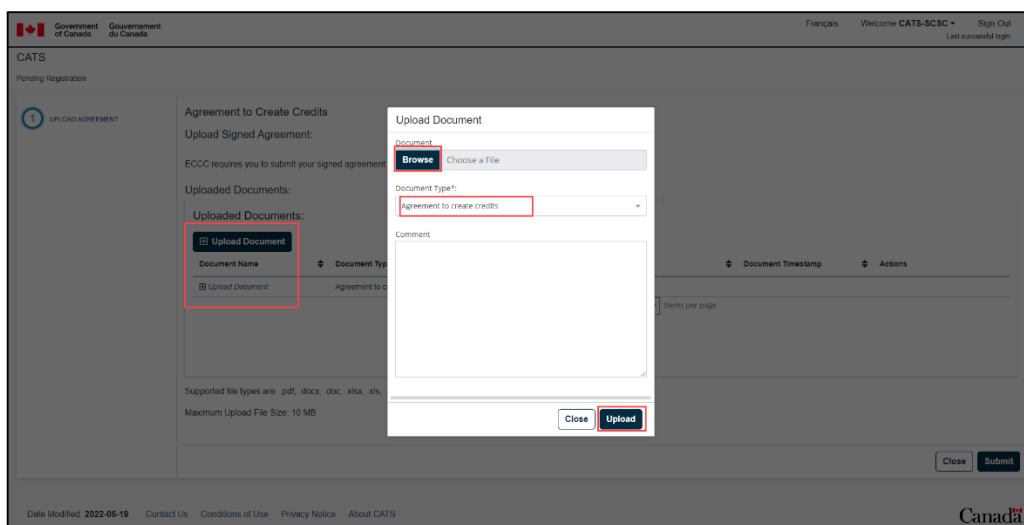
Figure 42: Agreement to Create Credits - Browse and Upload Signed Agreement

d) Once the document has been uploaded successfully, select **Submit** to complete the requirement. A confirmation prompt will be displayed, select **OK**.

A success message is displayed and a green check mark indicates that the requirement has been completed. The Registered Creator will receive an email notification confirming that the agreement has been submitted to ECCC.
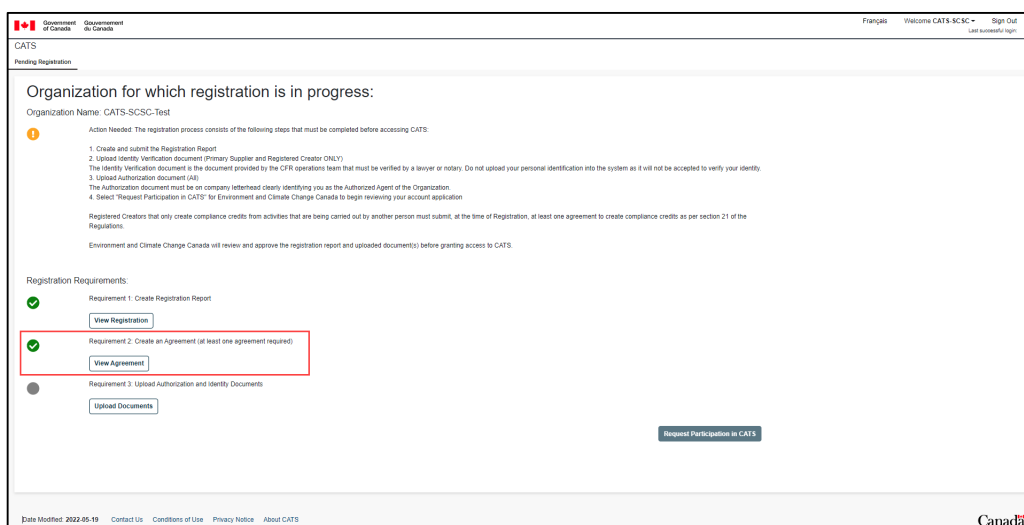
Figure 43: Agreement to Create Credits - Other Party not in CATS - Requirement Met

3.4.2 Other Party to the Agreement is already registered in CATS - Approve Agreement

a) After having generated an agreement in the previous step, a confirmation that the agreement has been submitted to the Other Party to the Agreement is displayed on the screen.

An email notification is also sent to both parties informing the Other Party to the Agreement that the consent is required.
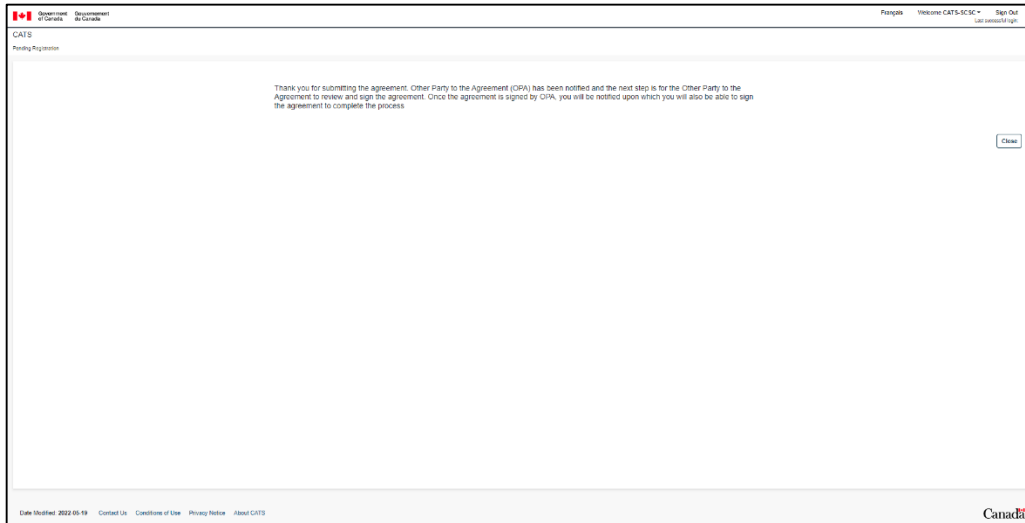
Figure 44: Agreement to Create Credits - Submitted to Other Party registered in CATS

b) Upon selecting **Close** in the previous screen, the Agreement to Create Credits screen displays an updated status: "Pending Other Party to the Agreement Approval".
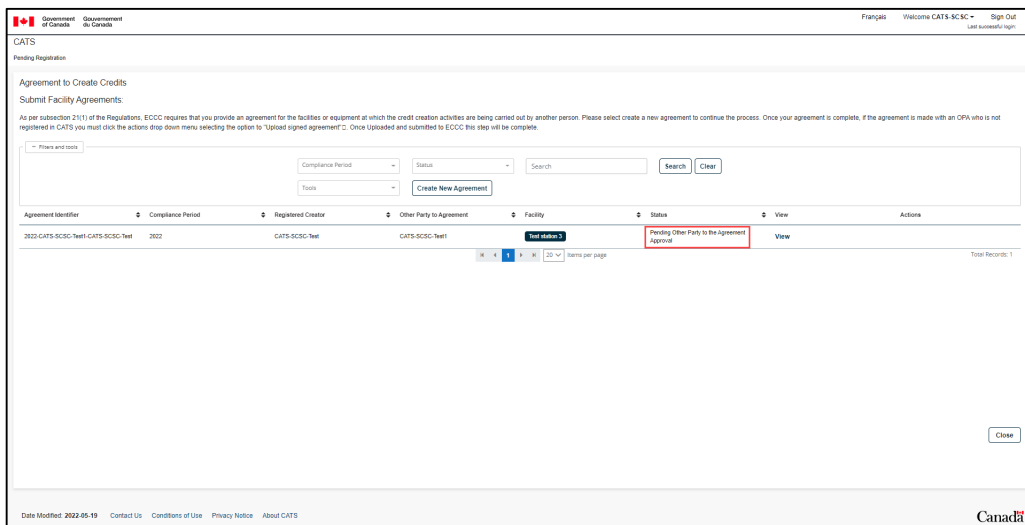
Figure 45: Agreement to Create Credits - Status Updated

c) The Other Party to the Agreement will receive a task to complete in CATS.

Select **Action Required: Review and Sign Agreement** > **Take Action** to proceed to the next step.
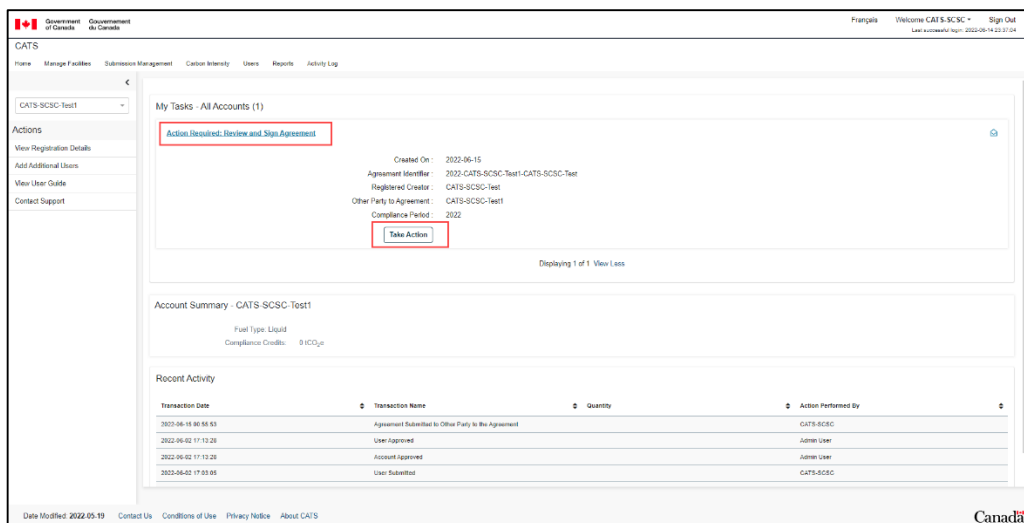
Figure 46: Agreement to Create Credits - Other Party - Approve Agreement

d) Review the agreement information displayed under the below seven steps:
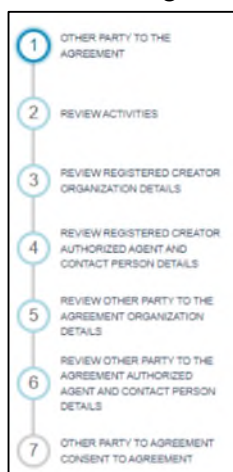
- Other party to the agreement
- Review activities
- Review registered creator organization details
- Review registered creator Authorized Agent and contact person details
- Review other party to the agreement organization details
- Review other party to the agreement authorized agent and contact person details
- Other party to agreement consent to agreement

Upon the last step, the Other Party to the Agreement must check the box **I confirm that all the information provided in this agreement is correct** prior to selecting **Sign Agreement**.

After having confirmed the intention to sign, an email notification is sent to both parties indicating that the Registered Creator's consent is now required.

Figure 47: Agreement to Create Credits - Signed by Other Party to the Agreement

e) Upon the approval of the agreement by the Other Party to the Agreement, the Registered Creator will see the status of the created agreement change to Pending RCA Approval. In order to approve, the user must select **Review Agreement** from the **Actions** drop-down menu.

Figure 48: Agreement to Create Credits - Registered Creator Reviews Agreement

f) The last step of the process is displayed (step 8) and requires the Registered Creator to check the box **I confirm that all the information provided in this agreement is correct** and select **Sign Agreement**. A success message is displayed and a green check mark indicates that the requirement has been completed.

Figure 49: Agreement to Create Credits - Registered Creator Consents to the Agreement

Figure 50: Agreement to Create Credits - Other Party registered in CATS - Requirement Met

3.5. Uploading Authorization and Identity Documents

The second requirement (or third if Agreement required) upon registration in CATS requires the Authorized Agent to upload two documents:

▪ Identity Verification Document (**Appendix A: Identity Verification Document** provides further instructions).

This Identity Verification Document allows ECCC to verify the identity of the Authorized Agent designated by the Primary Supplier or Registered Creator organization. Only the ECCC provided form for this document will be accepted to verify the identity of the Authorized Agent. Individual pieces of ID (Passport, driver's licence, etc.) will not be accepted by ECCC directly.

NOTE: This requirement does not apply to Foreign Suppliers.

▪ Authorization document (**Appendix B: Authorization Document** provides further instructions).

The Authorization document is a letter of authorization issued by the Primary Supplier, Registered Creator or Foreign Supplier organization, clearly stating the user as the Authorized Agent or the Authorized Administrator. The document must be printed on a company letterhead.

To upload the required documents, proceed as follows:

1. select **Upload Documents** under Requirement 2: Upload Identity Documents (**Figure 29**).

2. on the next page (**Figure 51**):

   ▪ select **Upload Document** and browse to select the file;
   ▪ ensure that the file name is clearly identifying the Organization and contains the Authorized Agent name.

Uploading of documents can be achieved by selecting **Upload Document** blue button or by selecting specific **Upload Document** link to a document type. OTHER document type option is available from the drop-down menu for any other relevant documents to be uploaded.

NOTE: As the documents are being uploaded and scanned by the system, a loading icon will be displayed until the upload is completed.
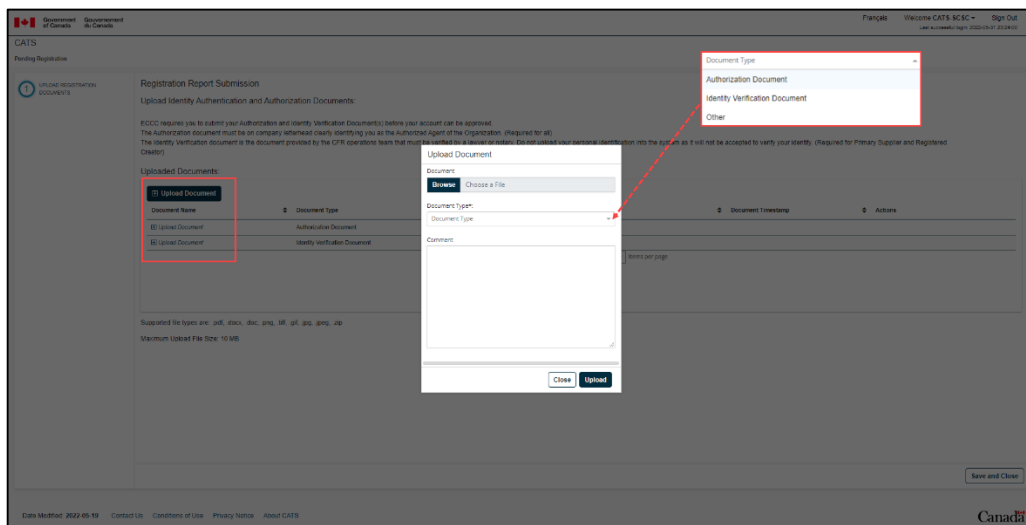
Figure 51: Uploading Identity Authentication and Authorization Documents

3. Once both documents are uploaded, select **Save and Close** to move to the next step.

   In case the user has uploaded the wrong document, Actions drop-down menu allows to delete it and the user can upload a new document by carefully selecting the correct Document Type.
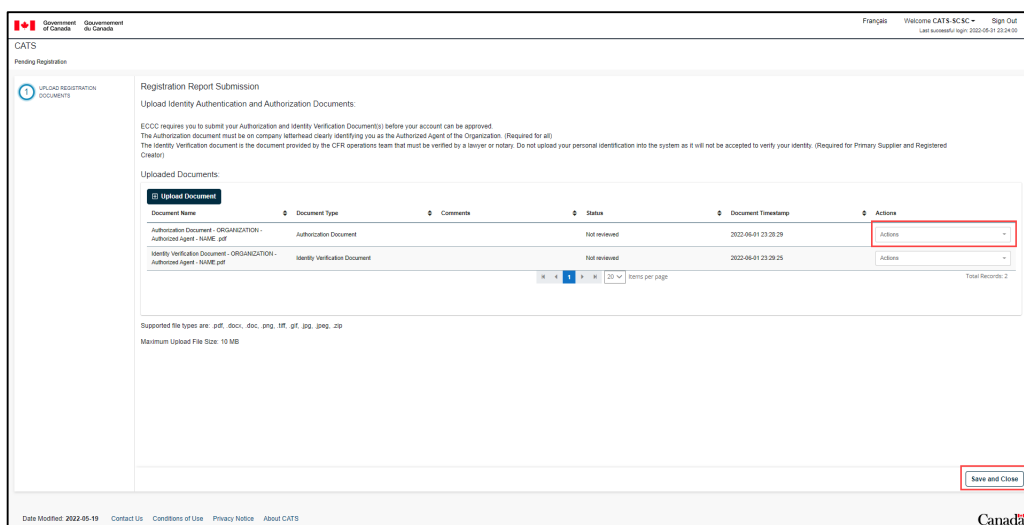
Figure 52: Deleting uploaded document or Proceeding to Next Step

4. Upon selecting **Save and Close**, the green check mark will be displayed indicating the completion of Requirement 2: Upload Identity Documents.
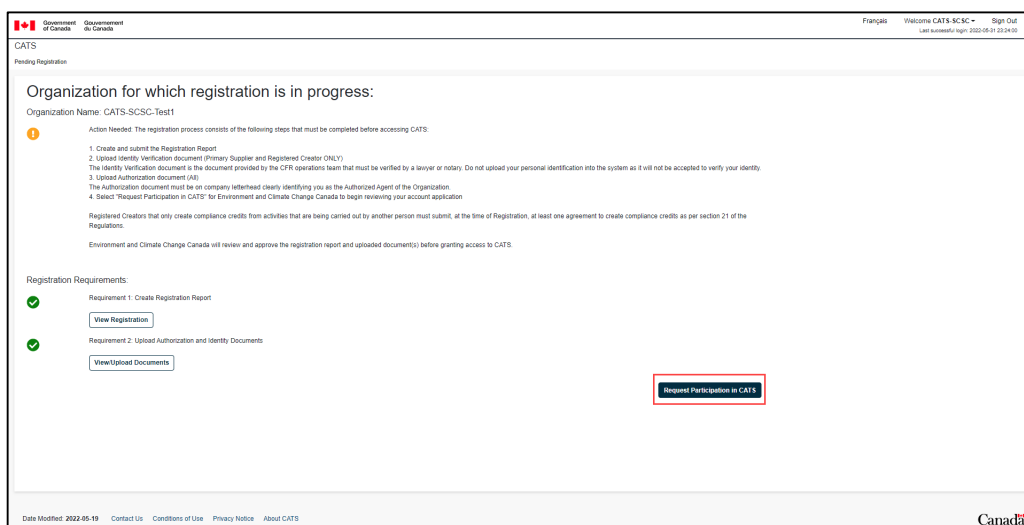
Figure 53: Requesting Participation in CATS

3.6. Requesting Participation in CATS

Upon the successful submission of the Registration Report (Requirement 1) and the upload of Identity Documents (Requirement 2), the user is now ready to complete the registration process.

1. Select **Request Participation in CATS** button (**Figure 53**).

2. A success message is displayed on the screen.

3. The user will receive an email confirming that the Primary Supplier, Registered Creator or Foreign Supplier account application has been submitted.
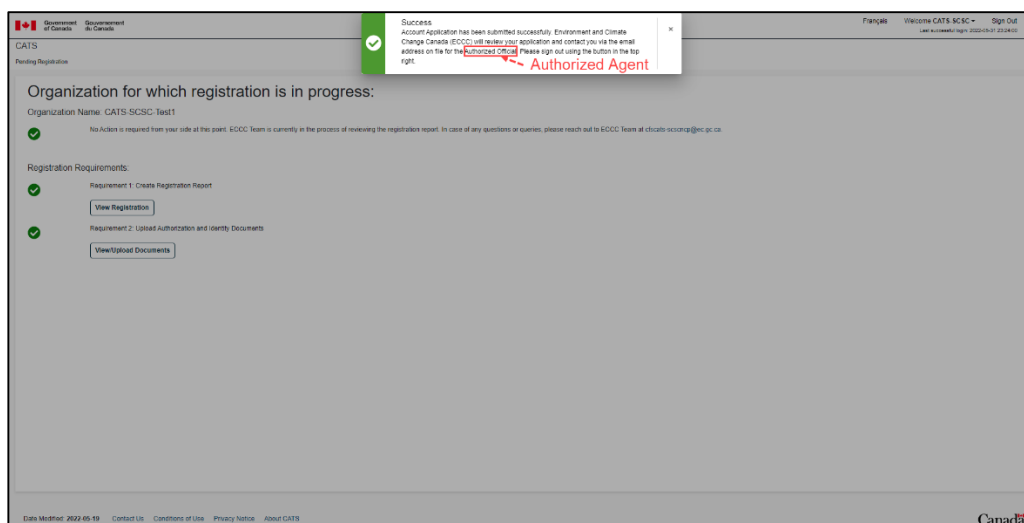
Figure 54: Requesting Participation in CATS Success Message

3.7. Pending Account Registration

No further action is required from the user at this stage. ECCC will review and accordingly, approve, reject, or request more information. Until the account registration is approved, the user cannot perform any other activities in CATS.

Account is approved:
- User will receive an email notification indicating that the application for a CFR account in CATS has been approved and that the account has been activated.
- User may log in to CATS to view available features. Refer to **section 5** to explore CATS features.

Account is rejected:
- User will receive an email notification indicating that the application for a CFR account in CATS has been rejected and will not be able to log in to CATS.
- User can contact ECCC for further details. Refer to **section 2.4** for ECCC contact information.

Approval requires more information:
- User will receive an email notification indicating that the application for a CFR account in CATS requires more information before it can be approved. The email will include the comment from ECCC.
- DO NOT REPLY to automated emails.
- User will need to log in to CATS to address the comment.

4. Applications

This section applies to users applying for the following approval in CATS:

- New pathway for carbon intensity from the Fuel LCA Mode;
- Carbon intensity for a low-carbon-intensity fuel ; or
- CO_2e-Emission-Reduction Project

Information submitted in the registration report affects the screens visible in the application screens. If the user does not have access to the applicable screens, confirm that the information has been completed correctly for all activities carried out by the organization in the registration report or contact ECCC.

Before creating an application in CATS, ensure that:

- Organization is a Registered Creator or a Foreign Supplier as defined in the *Clean Fuel Regulations*
- Pre-requisites for registration in CATS have been completed and full access has been granted to the system (User requested participation in CATS and ECCC approved - **section 3.6**).
- The activity that requires an application has been completed in the registration report.

4.1. Creating a new application in CATS

The following steps must be performed for creating an application in CATS for a Registered Creator or a Foreign Supplier.

To create an application the user must complete the following steps:

1. Navigate to the **Submission Management** tab at the top of the page. Refer to **section 5.5** for more information.
2. Select **Create New Application** to start a new application.

Figure 55: Applications - Creating New Applications

3. From the drop-down menu, select the desired application type:
    - **New Pathway Application** (**section 4.2**)
    - **Carbon Intensity Application** (**section 4.3**)
    - **CO$_2$e-Emission-Reduction Project Application** (**section 4.4**)

4. Select **Create Application**.
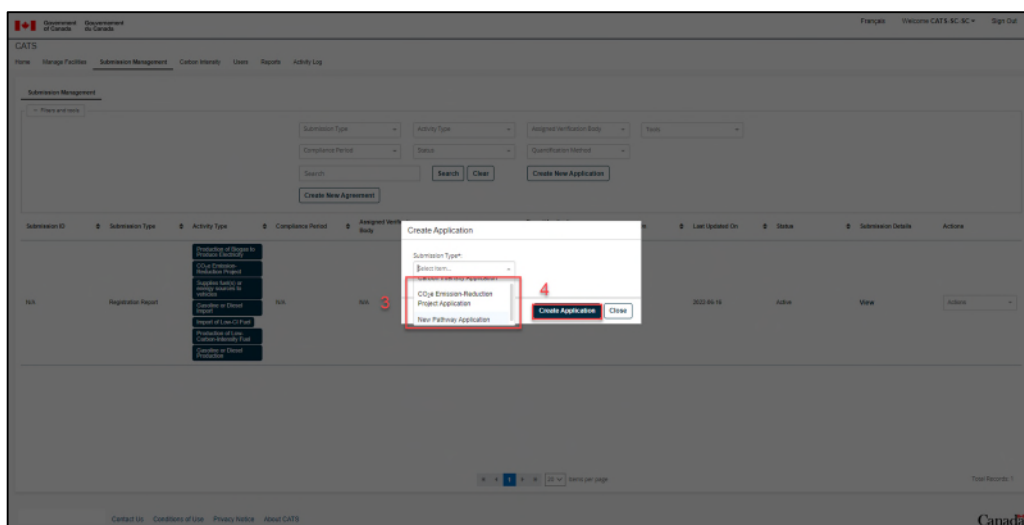
Figure 56: Applications - Creating New applications - select application type

4.2. New pathway application

Before making a Carbon Intensity application for the approval of a CI based on a new pathway, the new pathway application must first be submitted in CATS and approved by ECCC. New pathways require approval if the fuel or energy source is not indicated in the *Fuel LCA Model* or when the criteria in the *Specifications for Fuel LCA Model CI Calculations* for creating a new pathway are met. Please refer to the **Reference Documents** section for further information on where to find the above-mentioned documents.

The following steps must be performed to complete a New Pathway Application in CATS.

1. The New Pathway Application has been created.

To complete the application the user must complete the following steps on the Activity and Fuel Type Screen:

2. Select Activity
    a. **Production of low-CI fuel –** application for low-CI fuels or material inputs.

    For all New Pathway Applications for biogas, select **Production of low-CI fuel** from the activity menu. Do not select **Production of biogas for production of electricity**.

    b. **Supply of eligible fuel(s) or energy sources to vehicles -** application for a gaseous fossil fuel or hydrogen.

        ▪ If applying for a New Pathway for electricity, refer to **section 1.3**.

Figure 57: Applications - New Pathway Application - Activity Type

3. Select applicable fuel type, material input or energy source. Drop-down menu updates based on the activity type selected.

4. Select **Proceed to Next Step**.

Figure 58: Applications - New Pathway Application - Fuel Type

To complete the application the user must complete the following steps on the Upload Documents Screen:

5. Upload a copy of the following documents:
   - **Copy of the data workbook**
   - **Copy of the new pathway from the Fuel LCA Model with or without input data**

6. To add additional documents, select **Upload Document.**

For each additional document added, provide a short description of the document in the comment section. For New Pathway Applications, include the following additional document:

- **A report that includes all requirements outlined in Schedule 7 items 6-10, 12, and 14**

7. To submit the application, select **Submit to ECCC**.

Figure 59: Applications - New Pathway Application - Document upload and submission

Once selected, a confirmation message will be displayed prompting the user to confirm the submission to ECCC.

8. Select **OK**.

Figure 60: Applications - New Pathway Application - Document upload - Confirmation message

Upon completion of all the required steps, ECCC will review the New Pathway Application and uploaded documents before approving the New Pathway.
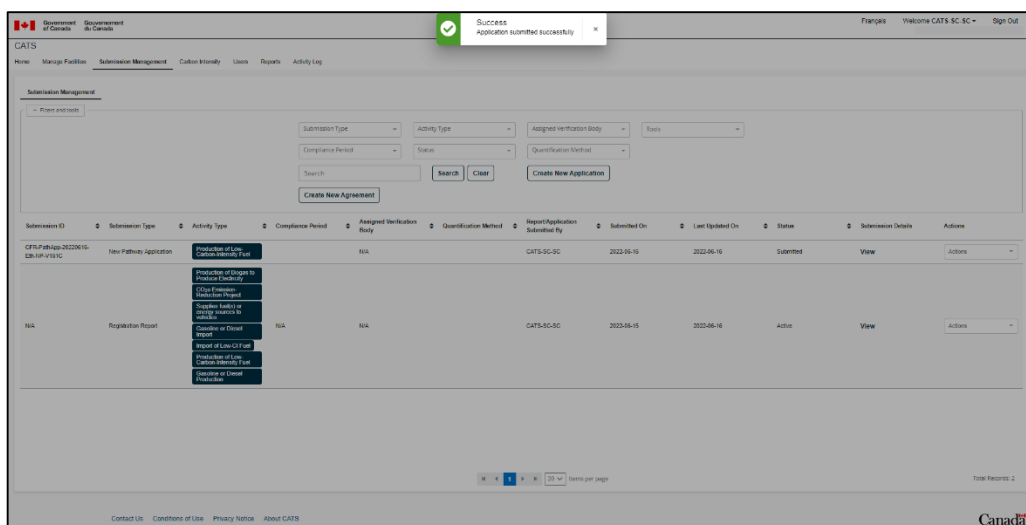
Figure 61: Applications - New Pathway Application - Application submitted - Success message

4.3. Carbon intensity application

A Carbon Intensity Application must be submitted to ECCC for approval for a CI to be used in credit creation. A foreign supplier can only apply for a CI for a fuel that is imported into Canada, and must select the **Production of Low CI Fuels (including biogas used to produce electricity)** when selecting activity type.

For CO_2e Emission-Reduction Projects that require a Carbon Intensity Application, refer to **section 1.3**.

The following steps must be performed to complete a Carbon Intensity Application in CATS.

1. The **Carbon Intensity Application** is selected.

2. Select the Activity type from the drop-down menu:
    - **Production of Low CI Fuels (including biogas used to produce electricity).**
    - **Gaseous Fuels Used At Fuelling Stations**
    - **Electricity**

3. Select **Create Application**.
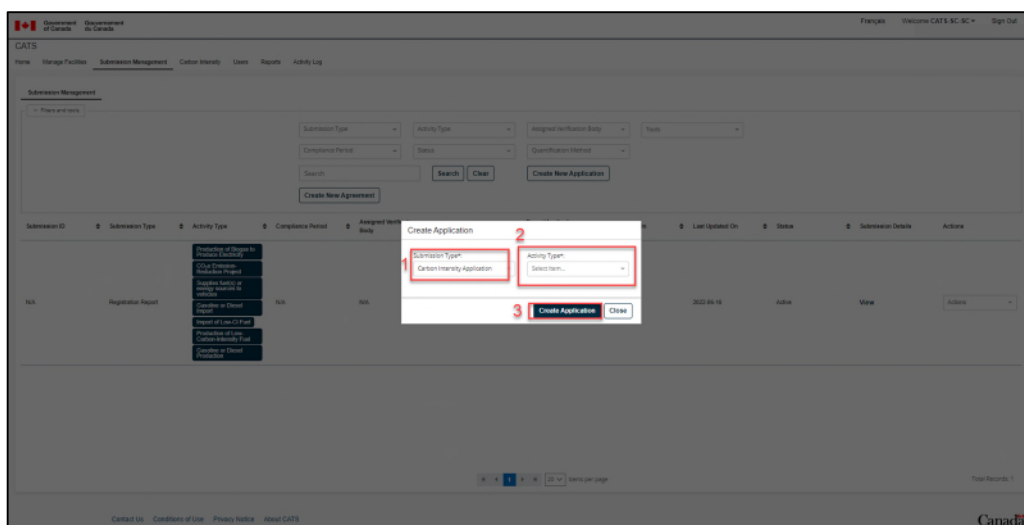
Figure 62: Applications - CI Application - Activity Type

4.3.1 CI application - Production of Low CI Fuels (including biogas used to produce electricity)

This Carbon Intensity Application covers instances of credit creation for low CI fuels, including biogas, and a foreign supplier applying for a CI for an imported fuel.

For Default CI Application:
To complete the application the user must complete the following steps on the Basic Information Screen:

1. Select the fuel type subject to the CI application.
2. Complete the required Basic Information.
   a) If applying for CI to replace a previously approved CI, select **Yes**.
      If not applying for CI to replace a previously approved CI, select **No**.
      If **Yes** is selected, select the ID of Most Recent CI Application for the Fuel from the drop-down.
   b) Number of Months of Data:
      ▪ **Less than 3 months** – Select if applying for a default CI.
   c) Method of Determining CI:
      ▪ Select **Default** if the facility has less than 3 months of data available to determine CI.
3. Select **Proceed to Next Step**.

Figure 63: Applications - CI Application - Production of low CI fuel - Basic information

The following steps describe information required in the Facility/Equipment Information Screen:

4. Select the facility associated to the CI in the application from the list of Organization's facilities.
5. Select **Proceed to Next Step**.

Figure 64: Applications - CI Application - Production of low CI fuel - Facilities/Equipment Information

6. Select the feedstock used to produce the fuel from the drop-down menu.
7. Enter the region where the feedstock was extracted/cultivated.
8. For Carbon Intensity Calculations, select the appropriate option from the drop-down menu for:
    a. Feedstock (CI_f)
    b. Production and Transportation (CI_p)
    c. Compression or Liquefaction (CI_{cl})
    d. Electricity (CI_e)
    e. Additional Transportation (CI_{td})
    f. Combustion or use (CI_c)

Figure 65: Applications - CI Application - Production of low CI fuel - Carbon Intensity

9. For the lifecycle stage Production and Transportation (CI_p):

    a. Select the Type of Energy Source from the drop-down menu.

    b. Enter a description of the Energy Source.

    c. Select **Add Energy Source**. This will add the energy source to the itemized list below.

    d. Select the **checkbox** of the energy source applicable to the default CI.

    In the event of an error, under the **Actions** drop-down menu, select **Edit** to make changes to the energy source.

    e. To remove energy source, select **Remove Selected Energy Source**.

Figure 66: Applications - CI Application - Production of low CI fuel - Carbon Intensity - Energy Source

10. Additional Information required for 13gCO$_2$e/MJ - Production and Transportation (CI_p)

    If the value of **13** is selected for Production and Transportation (CI_p) (**Figure 67**).

a. Select the Type of Energy Source from the drop-down menu.
b. Enter a description of the Energy Source.
c. Enter the estimated quantity of energy used by the energy source.
d. Select **Add Energy Source**. This will add the energy source to the itemized list below.
e. Select the **checkbox** of the energy source applicable to the default CI.

   In the event of an error, under the **Actions** drop-down menu, select **Edit** to make changes to the energy source.

f. To remove energy source, select **Remove Selected Energy Source**.

Figure 67: Applications - CI Application - Production of low CI fuel - Carbon Intensity CIp

11. Additional Information required for 0gCO$_2$e/MJ – Additional Transportation (CI$_{td}$)
    a. The total distance (in kilometers) of this input must be less than 1500km.

Figure 68: Applications - CI Application - Production of low CI fuel - Carbon Intensity CItd

12. Select **Proceed to Next Step**.

13. The following steps describe information required in the Upload Carbon Intensity Documents Screen:

Complete the upload for the following document types:
  a) **Diagram that shows the process flow used to produce the fuel or material input**
  b) **Report that includes all requirements outlined in Schedule 8 items 3d, 3e, 3g, and 3h.**

14. To add additional documents, select **Upload Document**
15. Comments can be added in the text box below. This should include a brief description of the document being uploaded.
16. Select **Proceed to Next Step**.

Figure 69: Applications - CI Application - Production of low CI fuel - Document upload

The following steps describe information required in the Contact Person Info Screen:

17. To complete the information for the Contact person responsible for the CI application:

  a. If the contact person for the CI application is the same as the Authorized Agent or the contact person for the organization, check the respective checkbox.
  b. If the contact person for the CI application differs from the Authorized Agent and the contact person for the organization, complete the following information.

Figure 70: Applications - CI Application - Production of low CI fuel - Contact person

18. Select **Submit to ECCC**.

   Once selected, a confirmation message will prompt the user to confirm the submission to ECCC.

19. Select **Ok**.

Figure 71: Applications - CI Application - Production of low CI fuel - Confirmation

Upon completion of all the required steps, ECCC will review the CI Application and uploaded documents before approving the CI.

Figure 72: Applications - CI Application - Production of low CI fuel - Success message

For Fuel LCA Model CI Application:

To complete the application the user must complete the following steps on the Basic Information Screen:

1. Select the fuel type or material input subject to the CI application.
2. Complete the required Basic Information.
   a) If applying for CI to replace a previously approved CI, select **Yes**.
      If not applying for CI to replace a previously approved CI, select **No**.
      If **Yes** is selected, select the ID of Most Recent CI Application for the Fuel from the drop-down menu.
   b) Number of Months of Data:
      - **24 months** - Select if applying for a Fuel LCA Model CI.
      - **3 to 23 months** - Select if applying for a Temporary Fuel LCA Model
   c) CI Method of Determining CI:
      Select **LCA Model** if the facility has more than 3 months of data available to determine CI.
   d) Type of Pathway Used in CI Application:
      - Select **Existing** - If an existing pathway will be used
      - Select **New** - If a new pathway will be used. This requires an approved pathway ID to be selected from the drop-down menu.
   e) Status of CI subject to this application
      - Select **Final** – if the facility has minimum 24 months of data available to determine CI.
      - Select **Temporary** if the facility has between 3 months and less than 24 months of data available to determine CI.
3. Select **Proceed to Next Step**.

Figure 73: Applications - CI Application - Production of low CI fuel - Carbon Intensity - Basic information

The following steps describe information required in the Facility/Equipment Information Screen:

4. Select the facility associated to the CI in the application from the list of Organization's facilities.

5. Select **Proceed to Next Step**

Figure 74: Applications - CI Application - Production of low CI fuel - Facility/Equipment selection

The following steps describe information required in the Carbon Intensity Information Screen:

6. Enter the Carbon Intensity including the carbon-intensity additional value, if applicable..
7. Select the feedstock used to produce the fuel from the drop-down menu.
8. Enter the region where the feedstock was extracted/cultivated.
9. Select **Proceed to Next Step**.

Figure 75: Applications - CI Application - Production of low CI fuel - Carbon intensity

The following steps describe information required in the Upload Carbon Intensity Documents Screen:

10. Complete the upload for the document types:
    a) **Diagram that shows the process flow used to produce the fuel or material input**
    b) **Report that includes all requirements outlined in Schedule 8 items 3d, 3e, 3g, and 3h.**
    c) **Copy of the pathway from the Fuel LCA Model**
    d) **Copy of the data workbook**
11. To add additional documents, select **Upload Document**
12. Comments can be added in the text box below. This should include a brief description of the document being uploaded.
13. Select **Proceed to Next Step**.

Figure 76: Applications - CI Application - Production of low CI fuel - Document upload

The following steps describe information required in the Contact Person Info Screen:

14. To complete the information for the Contact person responsible for the CI application:

- If the contact person for the CI application is the same as the Authorized Agent or the contact person for the organization, check the respective checkbox.

- If the contact person for the CI application differs from the Authorized Agent and the contact person for the organization, complete the following information.

Figure 77: Applications - CI Application - Production of low CI fuel - Contact person

15. Select **Submit to ECCC.**

Once selected, a confirmation message will prompt the user to confirm the submission to ECCC.

16. Select **Ok**.

Figure 78: Applications - CI Application - Production of low CI fuel - Confirmation message

Upon completion of all the required steps, ECCC will review the CI Application and uploaded documents before approving the CI.

Figure 79: Applications - CI Application - Production of low CI fuel - Success message

4.3.2 CI application - Gaseous Fuel used at a Fuelling Station

This CI application covers instances of credit creation for gaseous fuels used at fuelling stations.
To complete the application the user must complete the following steps on the Basic Information Screen:

1. Select the fuel type subject to the CI application.
2. Complete the required Basic Information.
   a) If applying for CI to replace a previously approved CI, select **Yes**.
      If not applying for CI to replace a previously approved CI, select **No**.
      If **Yes** is selected, select the ID of Most Recent CI Application for the Fuel from the drop-down menu.
   b) Number of Months of Data:
      ▪ **24 months** - Select if applying for a Fuel LCA Model CI.
      ▪ **3 to 23 months** - Select if applying for a Temporary Fuel LCA Model CI.
      ▪ **Less than 3 months** - do not select
   c) Type of Pathway Used in CI Application:
      ▪ Select **Existing**: If an existing pathway will be used
      ▪ Select **New**: If a new pathway will be used. This requires an approved pathway ID to be selected from the drop-down menu.
   d) Status of CI subject to this application
      ▪ Select **Final** – if the facility has minimum 24 months of data available to determine CI.
      ▪ Select **Temporary** if the facility has between 3 months and less than 24 months of data available to determine CI.
3. Select **Proceed to Next Step**.

Figure 80: Applications - CI Application - Gaseous fuel used at fuelling station - Basic information

The following steps describe information required in the Fuelling Station Information Screen:

4. Select the fuelling station associated to the CI in the application from the list of Organization's fuelling stations.
5. Select **Proceed to Next Step**.

Figure 81: Applications - CI Application - Gaseous fuel used at fuelling station - Facility/Equipment Selection

The following steps describe information required in the Carbon Intensity Information Screen:
6. Enter the Carbon Intensity Value.
7. Select applicable thermal energy or electricity consumed in the compression or liquefaction of the fuel.
8. Select **Proceed to Next Step**.

Clean Fuel Regulations Credit and Tracking System: User Guide for Primary Suppliers, Registered Creators and Foreign Suppliers – v. 1.1

69

Figure 82: Applications - CI Application - Gaseous fuel used at fuelling station - Carbon Intensity

The following steps describe information required in the Upload Carbon Intensity Documents Screen:

9. Complete the upload for the following document types:
   a) **Copy of the pathway from the Fuel LCA Model**
   b) **Copy of the data workbook**
   c) **Diagram of each compression or liquefaction process**
10. To add additional documents, select **Upload Document**
    Please include the below additional document:
    a) **Report that includes all requirements outlined in Schedule 8 items 4n, 4p, and 4q**
11. Comments can be added in the text box below. This should include a brief description of the document being uploaded.
12. Select **Proceed to Next Step**.

Figure 83: Applications - CI Application - Gaseous fuel used at fuelling station - Document upload

The following steps describe information required in the Contact Person Info Screen:

13. To complete the information for the Contact person responsible for the CI application:
    a) If the contact person for the CI application is the same as the Authorized Agent or the contact person for the organization, check the respective checkbox.
    b) If the contact person for the CI application differs from the Authorized Agent and the contact person for the organization, complete the following information.

Figure 84: Applications - CI Application - Gaseous fuel used at fuelling station - Contact person

14. Select **Submit to ECCC**.

Once selected, a confirmation message will prompt the user to confirm the submission to ECCC.

15. Select **Ok**.

Figure 85: Applications - CI Application - Gaseous fuel used at fuelling station - Confirmation message

Upon completion of all the required steps, ECCC will review the CI Application and uploaded documents before approving the CI.
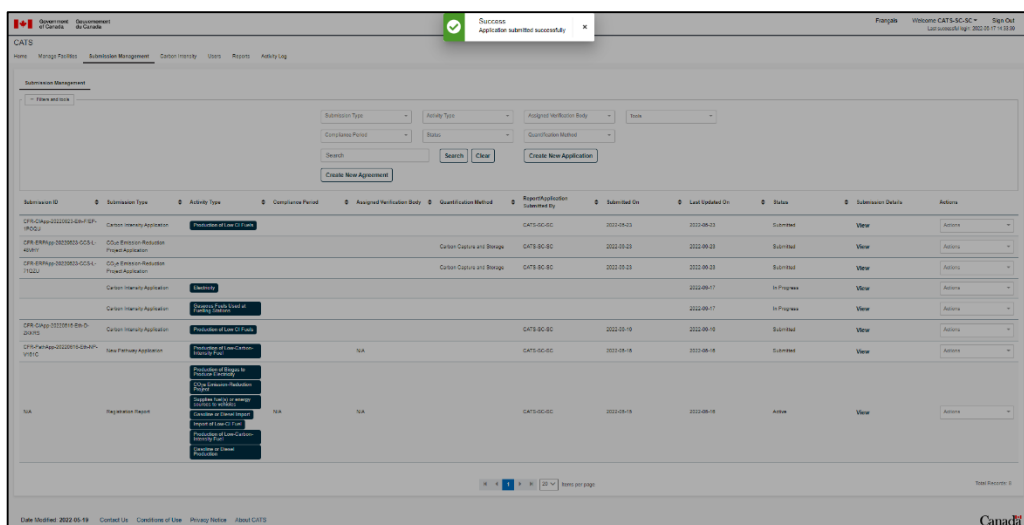
Figure 86: Applications - CI Application - Gaseous fuel used at fuelling station - Success message

4.3.3 CI application - Electricity

This CI application covers instances of credit creation for electricity supplied at charging stations.
To complete the application the user must complete the following steps on the Basic Information Screen:

1. Select the electricity as the energy source subject to the CI application.
2. Complete the required Basic Information.
    a) If applying for CI to replace a previously approved CI, select **Yes**.
        If not applying for CI to replace a previously approved CI, select **No**.
        If **Yes** is selected, select the ID of Most Recent CI Application for the electricity from the drop-down menu.
    b) Number of Months of Data:
        ▪ **24 months** - Select if applying for a Fuel LCA Model CI.
        ▪ **3 to 23 months** - Select if applying for a Temporary Fuel LCA Model CI.
        ▪ **Less than 3 months** - do not select
    c) Status of CI subject to this application
        ▪ Select **Final**: if the charging station has minimum 24 months of data available to determine CI.
        ▪ Select **Temporary** if the charging station has between 3 months and less than 24 months of data available to determine CI.
3. Select **Proceed to Next Step**.

Figure 87: Applications - CI Application - Electricity - Basic information

The following steps describe information required in the Charging Station Information Screen:

4. Select **Add Charging Station (Charging-Station Host)** or **Add Charging Station (General Public Charging-Station)** as applicable. Enter the basic information for charging station name and address.

5. Select **Proceed to Next Step**.

Figure 88: Applications - CI Application - Electricity - Charging Station Information

The following steps describe information required in the Carbon Intensity Information Screen:

6. Enter the Carbon Intensity Value.

An option must be selected from item 7, item 8, or both. The user will trigger a warning message if neither option is selected. If no element is selected in 7, and the "field required" message appears, selecting an item in 8 will allow the user to move forward in the application.

7. Select the source of electrical energy by technology supplied to electric vehicles at charging stations, as applicable.
8. Select all provincial or territorial electrical grids from which electricity is supplied to electric vehicles at charging stations, as applicable.
9. Select **Proceed to Next Step**.

Figure 89: Applications - CI Application - Electricity - Carbon Intensity

The following steps describe information required in the Upload Carbon Intensity Documents Screen:

10. Complete the upload for the document types:
    a) **Copy of the pathway from the Fuel LCA Model**
    b) **Copy of the data workbook**
11. To add additional documents, select **Upload Document**

    Please include the following additional document:
    a. **Report that includes all requirements outlined in Schedule 8 items 5k, 5m, and 5n**

12. Comments can be added in the text box below. This should include a brief description of the document being uploaded.
13. Select **Proceed to Next Step**.

Figure 90: Applications - CI Application - Electricity - Document upload

The following steps describe information required in the Contact Person Info Screen:

14. To complete the information for the Contact person responsible for the CI application
    a) If the contact person for the CI application is the same as the Authorized Agent or the contact person for the organization, check the respective checkbox.
    b) If the contact person for the CI application differs from the Authorized Agent and the contact person for the organization, complete the following information.

Figure 91: Applications - CI Application - Electricity - Contact Person

15. Select **Submit to ECCC.**

Once selected, a confirmation message will prompt the user to confirm the submission to ECCC.

16. Select **Ok**.

Clean Fuel Regulations Credit and Tracking System: User Guide for Primary Suppliers, Registered Creators and Foreign Suppliers – v. 1.1

75

Figure 92: Applications - CI Application - Electricity - Confirmation message

Upon completion of all the required steps, ECCC will review the CI Application and uploaded documents before approving the CI.

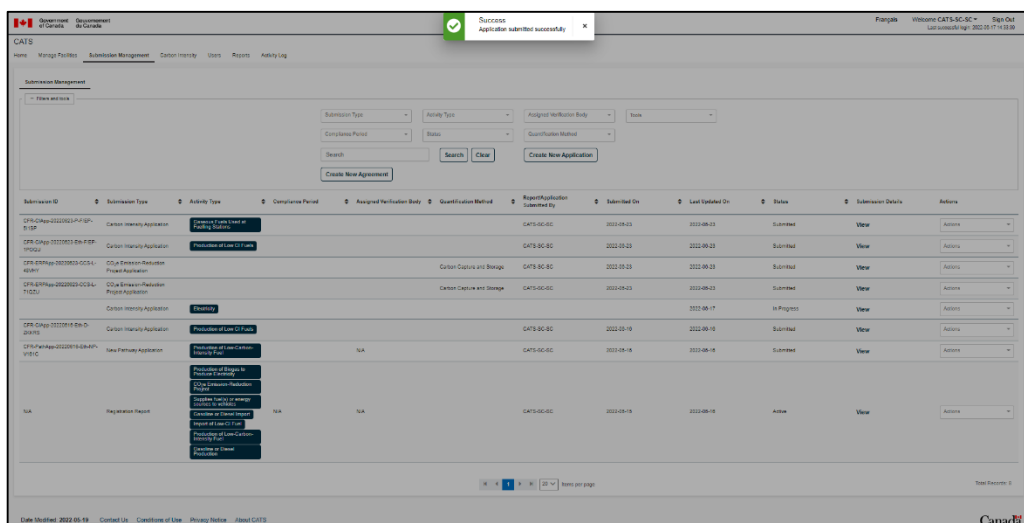Figure 93: Applications - CI Application - Electricity - Success message

4.4. Application for CO₂e Emission Reduction Project

This application is for the recognition of a CO_2e Emission-Reduction Project. This application is to be completed for all specific and generic quantification methods listed under the *Clean Fuel Regulations*. To complete the application the user must complete the following steps on the Facilities/Equipment Information Screen:

1. CO_2e Emission-Reduction Project Application has been created.
2. Select the facility or equipment associated to the project in the application from the list of Organization's facility/equipment.
3. Select **Proceed to Next Step**.

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76

Figure 94: Project Application - Facility/Equipment Information

The following steps describe information required in the Project Information Screen:

4. Select applicable **Quantification Method** from the drop-down menu.
5. Enter the **start date** of the project
6. Enter the **end date** of the project, if applicable.
7. If the project receives funding from a regulatory regime, select **federal or provincial** from the drop-down menu.
8. If the project receives funding from a regulatory regime, enter a **description** of the regulatory regime, and select **Add**.
9. Select **Proceed to Next Step**.

Figure 95: Project Application - Project Information

The following steps describe information required in the Upload Project Documents Screen:

10. Complete the upload for the document types:

a) **Information required by the emission-reduction quantification method provided under the *Clean Fuel Regulations*.** Required documents are determined in the quantification method for the project type.

11. To add additional documents, select **Upload Document**
Comments can be added in the text box below. This should include a brief description of the document being uploaded.
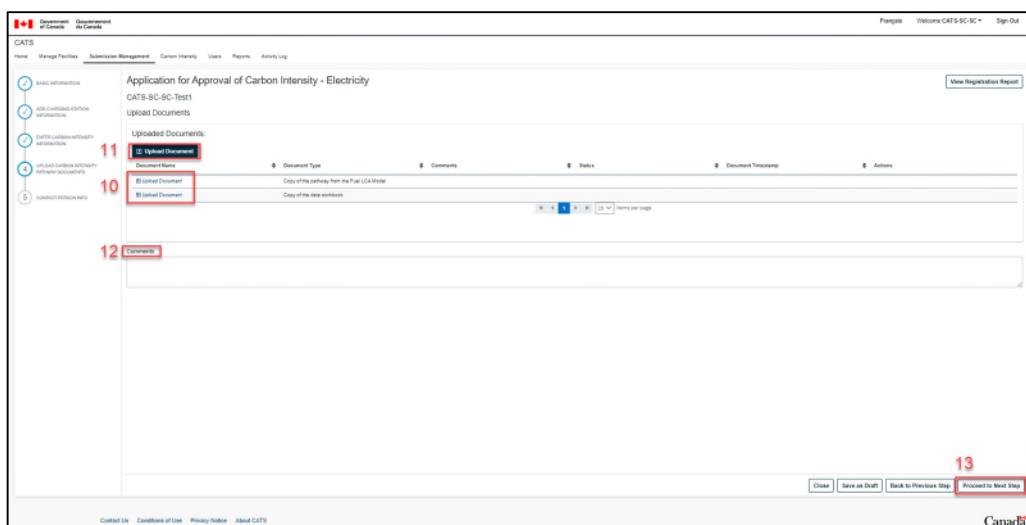
12. Select **Proceed to Next Step**.

Figure 96: Project Application - Document Upload

The following steps describe information required in the Contact Person Info Screen:

13. To complete the information for the Contact person responsible for the Project Application
   ▪ If the contact person for the Project Application is the same as the Authorized Agent or the contact person for the organization, check the respective checkbox.
   ▪ If the contact person for the Project Application differs from the Authorized Agent and the contact person for the organization, complete the following information.

Figure 97: Project Application - Contact person

14. Select **Submit to ECCC.**

Once selected, a confirmation message will prompt the user to confirm the submission to ECCC.

15. Select **Ok**.

Figure 98: Project Application - Confirmation message

Upon completion of all the required steps, ECCC will review the project application and uploaded documents before approving the project.
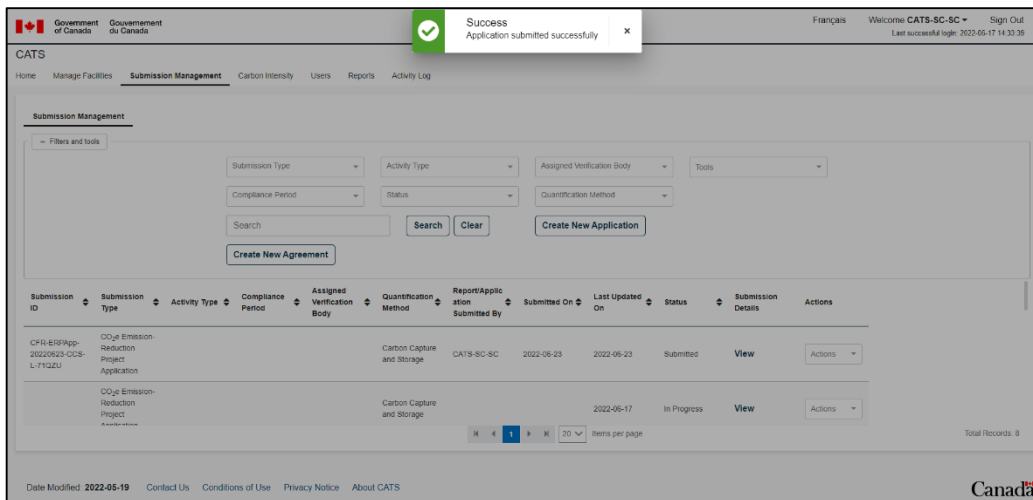
Figure 99: Project Application - Success message

4.5. Request to cancel an application

If an application has been submitted to ECCC and the organization wishes to cancel it, follow the steps below:

1. Navigate to **Submission Management Tab**. Refer to **section 5.5** for more information.

2. Select the **Actions** drop-down menu associated to the application.

3. Select **Request Cancellation**.

4. Enter a comment explaining the reason for requesting the cancellation of the application.

5. Select **Submit Request to ECCC**.

6. A confirmation message will be displayed prompting the user to confirm the selection. Select **Ok**.

7. Upon acceptance, a success message will be displayed and an email notification will be sent to the user.

Figure 100: Application Cancellation Request

4.6. Request to release an application

If an application has been submitted to ECCC and the organization wishes to withdraw it from ECCC, follow the steps below:

1. Navigate to **Submission Management Tab**. Refer to **section 5.5** for more information.

2. Select the **Actions** drop-down menu associated to the application.

3. Select **Request Release**.

4. Enter a comment explaining the reason for requesting the release of the application.

5. Select **Submit Request to ECCC**.

6. A confirmation message will be displayed prompting the user to confirm the selection. Select **Ok**.

7. Upon acceptance, a success message will be displayed and an email notification will be sent to the user.

Figure 101: Application Release Request

5. CATS Features

5.1. Account overview

CATS account for a Primary Supplier, a Registered Creator or a Foreign Supplier allows the Authorized Agent and other users to access seven main tabs. Users can view information and perform available actions in the current version of CATS and as per the assigned permission levels as explained in **section 2.3**.

Available options are briefly explained below and in more detail in each major section.
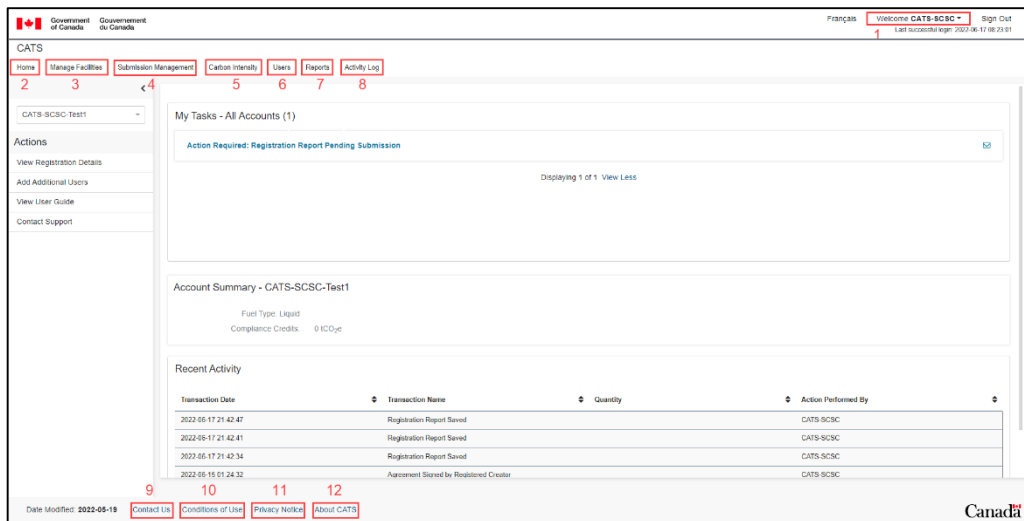
Figure 102: Account Approved (Active) - User Account Overview

1. **Welcome**: drop-down menu allows access to **My Profile** and **Select New Login Credentials**. My Profile is the first area to be accessed once the account has been approved by ECCC.

2. **Home**: tab gives the user an overview of CATS. User has the ability to perform certain actions and view tasks, account summary and recent activity.

3. **Manage Facilities**: tab provides information on facilities, equipment and fuelling stations associated to the organization.

4. **Submission Management**: tab allows access to create applications, create agreements and view submissions made by the organization.

5. **Carbon Intensity**: tab displays approved carbon intensity. Until approved, the carbon intensity submissions will show on the Submission Management tab.

6. **Users**: tab allows to view all users registered to the organization and access to other functions for managing users.

7. **Reports**: tab allows to view the Agreements to Create Credits.

8. **Activity Log**: tab tracks all account activity associated to the organization profile.

9. **Contact Us**: displays contact information for CFR Operations Office also available in **section 2.4**.

10. **Conditions of Use**: displays the conditions of use content accepted by the user. All users must accept CATS conditions of use in order to access and use CATS.

    Any amendments to the Conditions of Use will trigger displaying the Conditions of Use content upon user login and prompting user acceptance. The new content will then be available in this section.

11. **Privacy Notice**: displays the privacy notice on personal information being collected by ECCC.

12. **About CATS**: displays the list of supported browsers.

5.2. Welcome Menu

The Welcome menu allows access to My Profile and Select New Login Credentials.

5.2.1 My Profile

Once the CATS account has been approved by ECCC, the user is required to navigate to this area and complete their missing information. The user also has the ability to select the preferred method for receiving the Verification Code (Email or SMS).

The User Role section of the screen displays the user role, associated account and the status.

The Documents section lists the Identity Verification Document(s) submitted to ECCC, displaying the status and the time stamp. The Actions drop-down menu options allows to download the document.

If any of the information has been modified, please select **Submit** in order to save the information. A success message will be displayed and user redirected to the Users tab. The user will also receive an email confirmation notice indicating that the information in user's CATS profile has been updated.
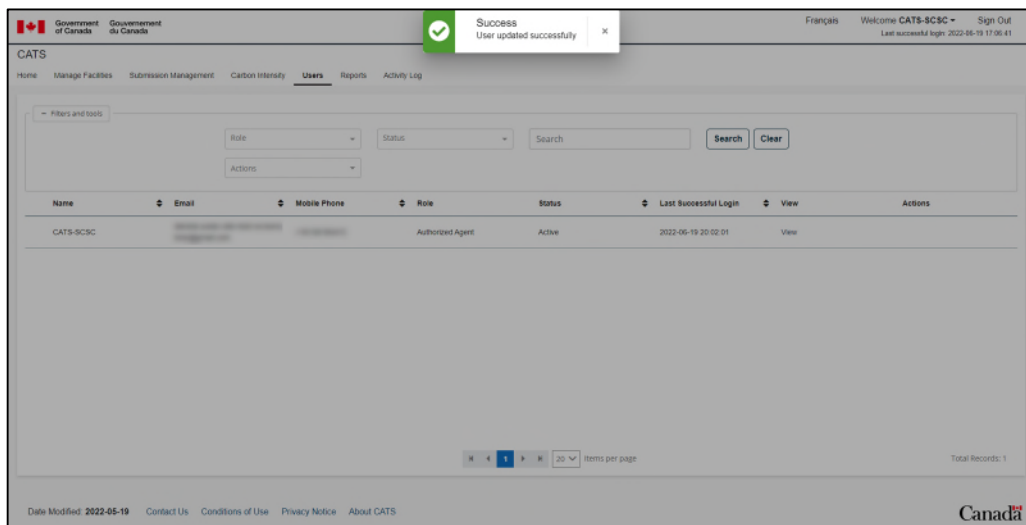
Figure 103: My Profile - User information updated - Success message

5.2.2 Select New Login Credentials

Once the user has selected the option **Select New Login Credentials** from the drop-down menu, select **Ok** to proceed to the next step. The user will be prompted to select between the Sign-In Partner or GCKey as during the initial registration steps. Follow the instructions on the screen.

5.3. Home Tab

The Home tab consists of four sections listed below:
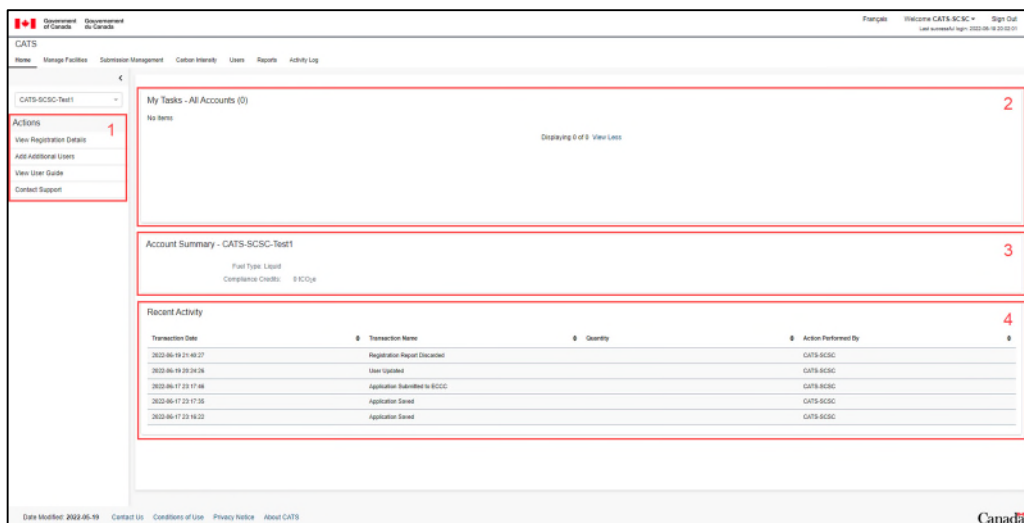
Figure 104: Home Tab - Main Screen

1. Actions menu:

    a) View Registration Details

        This section provides multiple information to the user (**Figure 105**).

        - Account History
        - Organization Role(s)
        - Registration Report Details

            The **actions** drop-down menu on the latest version of the registration report marked as active allows to:
            o **Download** the registration report
            o **Edit** the registration report (**section 7**)
            o **Request Authorized Agent Replacement (section 10**)
            o **Request Cancellation (section 8**)

        - Assigned Users
        - General Information
        - Agreement Information
        - Documents
            Displays the authorization document and allows the download of an already submitted document.

Figure 105: Home Tab - View Registration Details

b) Add Additional Users
    This section allows Authorized Agents and Authorized Administrators to add additional users.
    For step-by-step process, refer to **section 9**.

c) View User Guide
    Selecting this option prompts the user to download the latest version of this User Guide,
    available in both official languages.

d) Contact Support
    This options displays the contact information for the CFR Operations Office, same information
    as displayed at the bottom of CATS screens.

2. My Tasks:
    Any pending tasks will be displayed in this section of the Home tab. Select the task to access the
    Take Action button.

3. Account Summary:
    This section displays all the credit and obligations information for the account.

4. Recent Activity:
   This section displays five more recent activities for the organization account. If more information on activities is required, the user can navigate to the **Activity Log** tab.

5.4. Manage Facilities Tab

This tab displays information related to facilities, equipment and fuelling stations associated to the organization (**Figure 106**).

The view feature allows to display further information on the facility including information related to agreements to create credits.

In case of a high number of records, users have the ability to use filters, sort and export the data. The search field may also be used to search for specific information.

Filters	Sort	Tools
▪ Type	▪ ID	▪ Export to Excel
Facility	▪ Organization Name	▪ Export to PDF
Equipment	▪ Type	
Fuelling Station	▪ Name	
▪ Province	▪ Province/Territory	
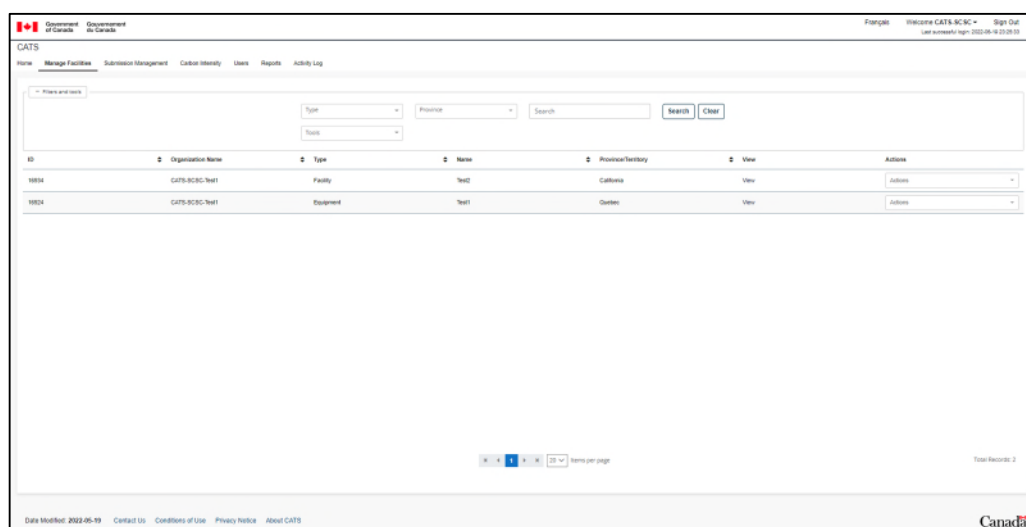
Figure 106: Manage Facilities Tab

5.5. Submission Management Tab

This section displays all submissions completed by the organization.

Additionally, users can access the capability to:

▪ Create New Application (**section 4**)
▪ Create New Agreement (**section 3.4**)

Figure 107: Submission Management Tab

1. In case of a high number of records, users have the ability to use filters, sort and export the data. The search field may also be used to search for specific information.

   Submission Type drop-down menu options are:
   - Agreement to create credits
   - Carbon Intensity Application
   - CO_2e-Emission-Reduction Project Application
   - New Pathway Application
   - Registration Report

   Activity Type drop-down menu options are:
   - CO_2e-Emission-Reduction Project
   - Electricity
   - Gaseous Fuels Used at Fuelling Stations
   - Gasoline or Diesel Import
   - Gasoline or Diesel Production
   - Import of Low-CI Fuel
   - Production of Biogas to Produce Electricity
   - Production of Low CI Fuels
   - Supplies fuel(s) or energy sources to vehicles

   Assigned Verification Body information will be available in future versions of CATS.

   Compliance Period drop-down menu lists years 2022 to 2034.

   Status drop-down menu allows to select the desired status from the data available on the screen.

   Quantification Method drop-down menu options are:
   - Co-Processing in Refineries
   - CO_2 Capture and Permanent Storage
   - Enhanced Oil Recovery with CO_2 Capture and Permanent Storage
   - Generic Quantification Method
   - Low-Carbon-Intensity Electricity Integration

- Low-Carbon-Intensity Hydrogen Integration

Filters	Sort	Tools
▪ Submission Type	▪ Submission ID*	▪ Export to Excel
▪ Activity Type	▪ Submission Type	▪ Export to PDF
▪ Assigned Verification Body	▪ Activity Type	
▪ Compliance Period	▪ Compliance Period	
▪ Status	▪ Assigned Verification Body	
▪ Quantification Method	▪ Quantification Method	
	▪ Report/Application Submitted By	
	▪ Submitted On	
	▪ Last Updated On	
	▪ Status	

*Submission ID displays a unique identifier generated using the following protocol:
(e.g. CFR-CIApp-20220617-BioG-F/EP-X7BRX)

CFR:	Program abbreviation
CIApp:	CI Application
20220617:	Date the application was submitted
BioG:	Fuel code associated to the fuel selected by the user
F/EP:	type of CI (F for final)/existing pathway
X7BRX:	random sequence

2. Actions drop-down menu options will depend on the submission type.

   For applications, the user can perform the following actions:

   Application is not submitted (status In Progress)
   - Edit
   - Discard

   Application is submitted (status Submitted)
   - Request Cancellation (**section 4.5**)
   - Request Release (**section 4.6**)
   - View History

   For other submission types, under the Actions drop-down menu, user will find some of the same options as available in other tabs.

5.6. Carbon Intensity Tab

This section displays all approved carbon intensity submitted by the organization. Until the applications are approved by ECCC, they will only show in the **Submission Management Tab** (**section 5.5**).
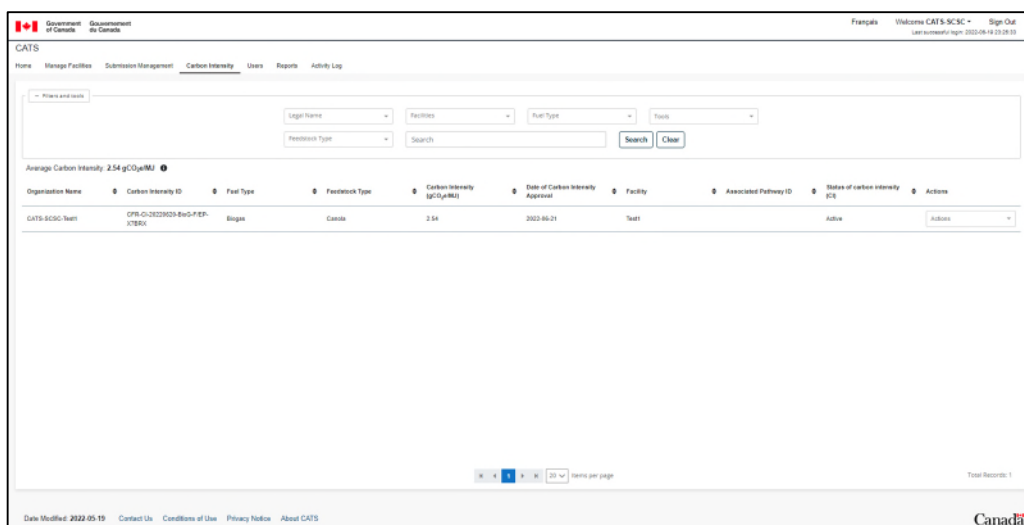
Figure 108: Carbon Intensity Tab

The Actions drop-down menu allows to:

- Request Cancellation (**section 4.5**).
- View CI Application
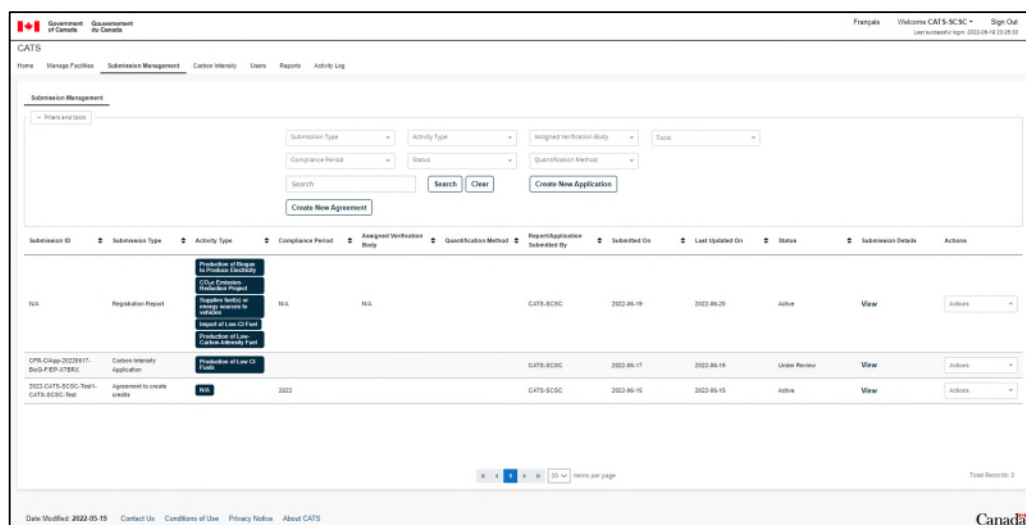
In case of a high number of records, users have the ability to use filters, sort and export the data. The search field may also be used to search for specific information.

Filters
- Legal Name
- Facilities
- Fuel Type
- Feedstock Type

Sort
- Organization Name
- Carbon Intensity ID*
- Fuel Type
- Feedstock Type
- Carbon Intensity (gCO$_2$e/MJ)
- Date of Carbon Intensity Approval
- Facility
- Associated Pathway ID
- Status of carbon intensity (CI)

Tools
- Export to Excel
- Export to PDF

*As in the Submission Management Tab, a unique ID is displayed.

Users will be able to associate the Carbon Intensity ID on this screen and the previous Submission ID displayed for the same application in the Submission Management tab:

Submission ID: CFR-CIApp-20220617-BioG-F/EP-X7BRX
Carbon Intensity ID: CFR-CI-20220620-BioG-F/EP-X7BRX

- 20220620 represents the date of the approval by ECCC

5.7. Users Tab

This tab allows to view all users registered to the organization and also to create new user profiles.

Figure 109: Users Tab

In case of a high number of records, users have the ability to use filters, sort and export the data. The search field may also be used to search for specific information.

Filters
- Role
- Status
- Actions

Sort
- Name
- Email
- Mobile Phone
- Status
- Last Successful Login

Actions
- Export to Excel
- Export to PDF
- Add User*

*To add additional users, refer to **section 9**.

The View option in the View column allows to access more information for each user and allows updates.

- Authorized Agent: to update information, proceed to **section 7** and update the registration report. This section allows only updating the method for receiving the verification code (SMS or email)

- The User Role section of the View screen allows to access Actions drop-down menu where a user can be Deactivated or Discarded.

   o Deactivate: User loses access and can be restored.
   o Discard: User is removed from the system.

5.8. Reports Tab

The reports tab displays all agreements associated to the organization.

The view feature associated to an agreement allows to display further information on the agreements to create credits.

In case of a high number of records, users have the ability to sort and export the data. The search field may also be used to search for specific information.
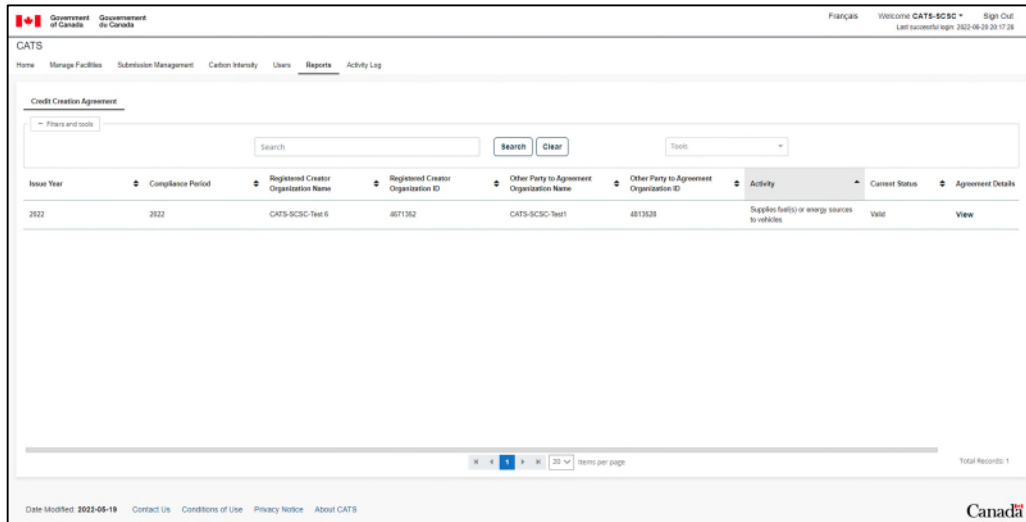
Figure 110: Reports Tab

Sort
- Issue Year
- Compliance Period
- Registered Creator Organization Name
- Registered Creator Organization ID
- Other Party to Agreement Organization Name
- Other Party to Agreement Organization ID
- Activity
- Current Status

Tools
- Export to Excel
- Export to PDF

5.9. Activity Log Tab

The activity log tab tracks all account activity related to the specific organization profile.
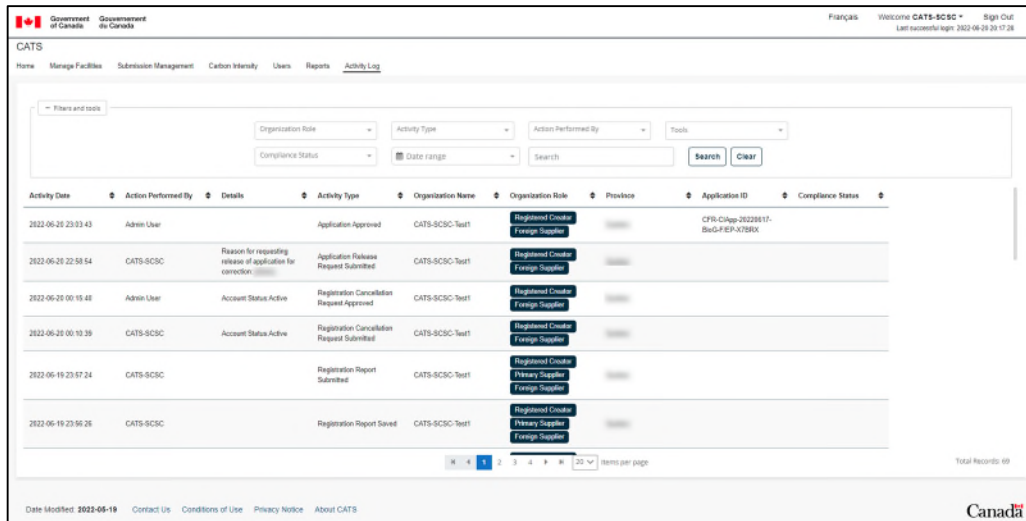
Figure 111: Activity Log Tab
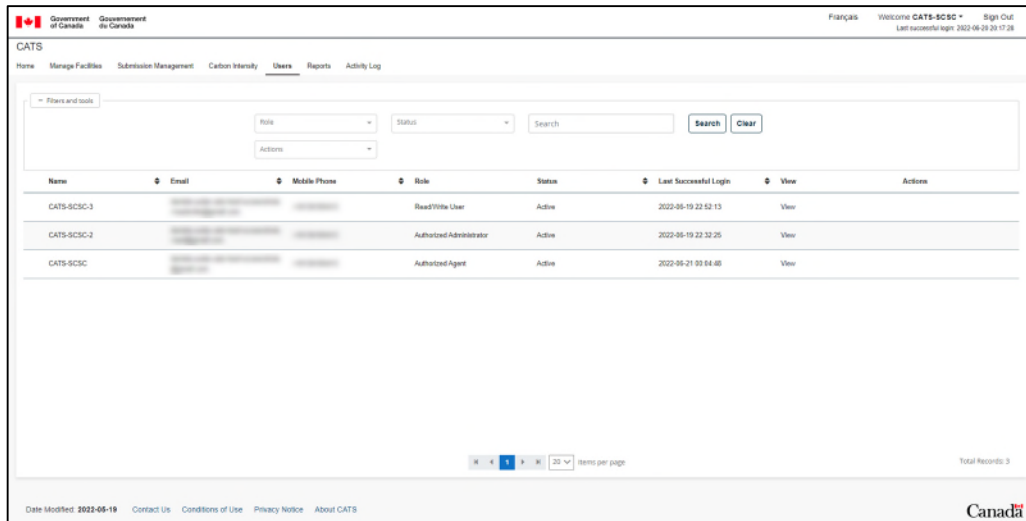
In case of a high number of records, users have the ability to use filters, sort and export the data. The search field may also be used to search for specific information.

Filters
- Organization Role
- Activity Type
- Action Performed By
- Compliance Status
- Date Range

Sort
- Activity Date
- Action Performed By
- Details
- Activity Type
- Organization Name
- Organization Role
- Province
- Application ID
- Compliance Status

Tools
- Export to Excel
- Export to PDF

6. Need More Information Function

Upon submitting the participation in CATS request or submitting documents/information by the users, ECCC may require more information in some cases. Users will be notified by either automated or direct emails from ECCC.

To address the Need More Information comments, users should log in to CATS and perform the following steps:

1. Navigate to the **Home Tab**.

2. Select the task under **My Tasks** section.

3. Select **Take Action** button.

4. Respond to ECCC's questions/comments by entering the response in the appropriate field. The example below illustrates a Need More Information screen regarding the initial registration process. After entering the response in the **Respond to Admin Comments** section, the user will have to select **Request Participation in CATS**.

Figure 112: Need More Information - User response (Request Participation in CATS example)

7. Change of Information (Updating Registration Report)

Upon the submission of the registration report, organizations can update some information during the pending ECCC approval process. However, once the account is approved, all the information contained in the registration report can be modified. The Authorized Agent must perform the following steps:

1. Navigate to the **Home Tab**.
2. Select **View Registration Details**.
3. From the Registration Report Details section of the screen, look for the most recent registration report. The status will show **Active**.
4. From the Actions drop-down menu, select **Edit**.
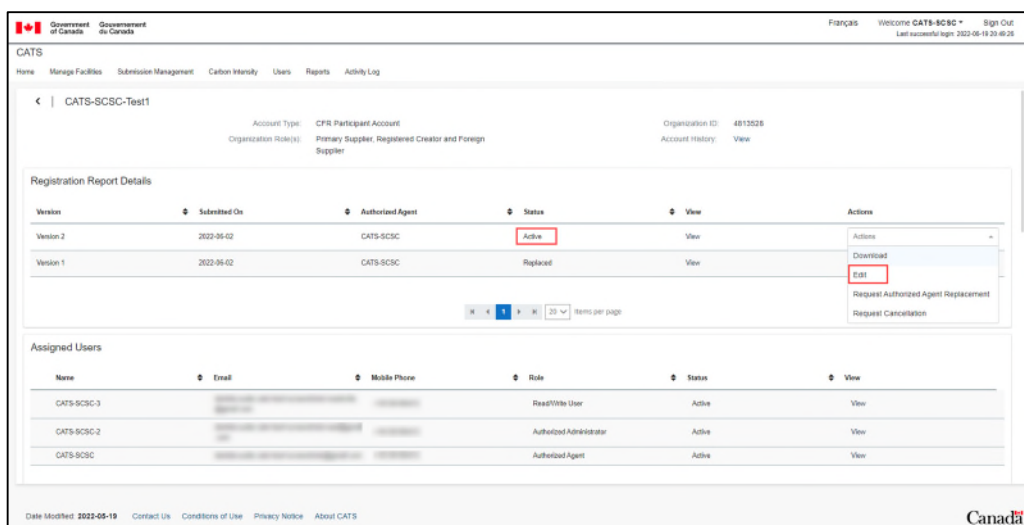
Figure 113: Change of Information (Updating Registration Report)

5.   Navigate through the active registration report pages and select **Proceed to Next Step**.

If the address information has been modified, ensure to check off and on again the **Same as…** checkbox for the information to be reflected correctly in the greyed out area.

6.   Once the modifications have been completed, continue selecting **Proceed to Next Step** until the last step where the **Submit Registration Report** button will become available to be selected.

7.   The success message will be displayed and the new version of the registration report will be displayed showing the **Active** status under the step #2 above.

8. Registration Cancellation

An organization may request to cancel their registration for one or multiple roles, however, this request may only be performed by the Authorized Agent and by proceeding as follows:

1.   Navigate to the **Home Tab**.
2.   Select **View Registration Details**.
3.   From the Registration Report Details section of the screen, look for the most recent registration report. The status will show **Active**.
4.   From the Actions drop-down menu, select **Request Cancellation**.
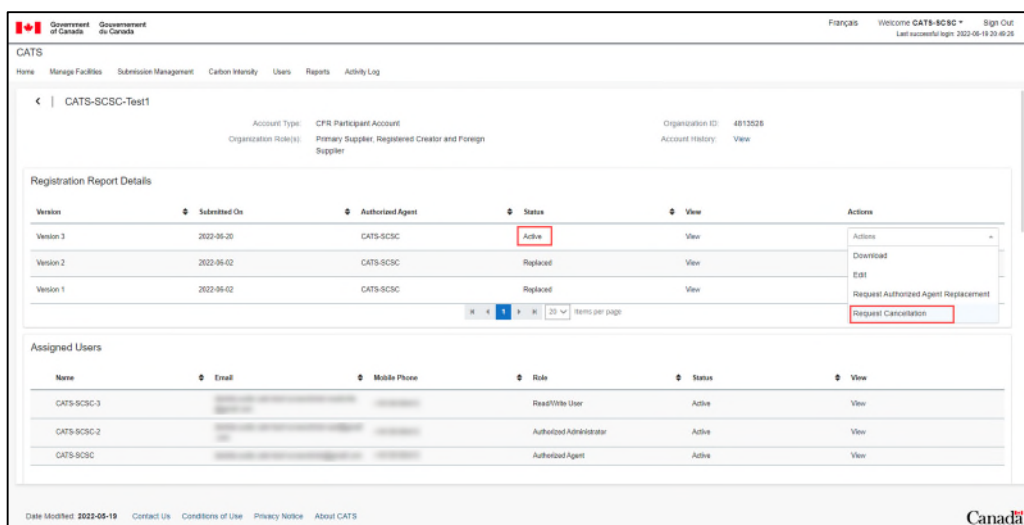
Figure 114: Request Cancellation

5.   All organization roles will be displayed. Select the applicable role(s) and check mark the box **I accept the cancellation of selected organization role(s) with regards to my organization account** and select **Submit Cancellation Request**.
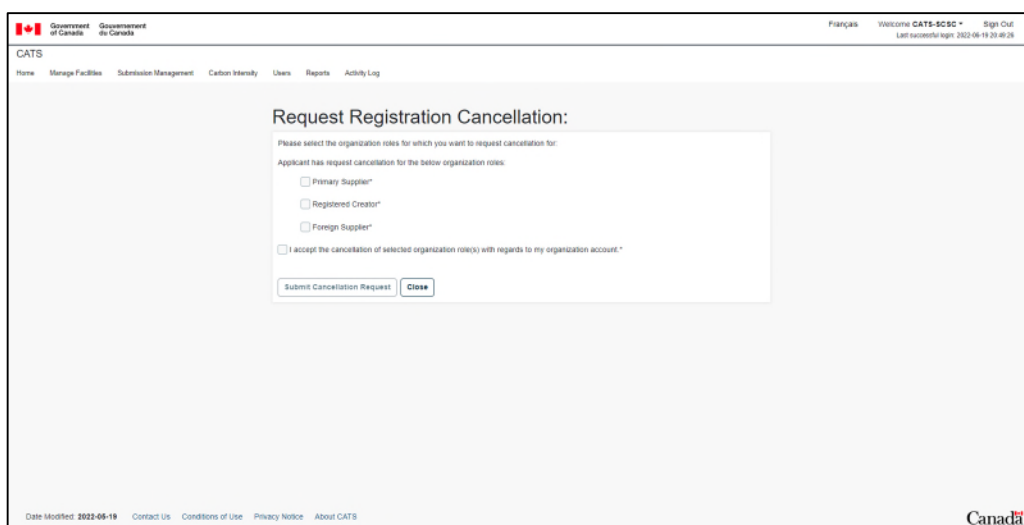
Figure 115: Request Cancellation - Select applicable role(s)

6.   A confirmation message will be displayed. Select **Ok**.
7.   A success message will be displayed and an email notification confirming submission to ECCC will be sent to the Authorized Agent.
8.   The cancellation request will be approved or rejected by ECCC. The user will receive an email notification.

9. Creating New User Profiles

An Authorized Agent/Administrator has the ability to add additional users to organization account, according to their permission levels as explained in **section 2.3**. The following steps describe the process:

Figure 116: Home Tab - Add Additional Users screen

1. Navigate to the **Home Tab**.
2. Select **Add Additional Users**.
3. Enter new user's required information:
    a) Name
    b) Email Address
    c) Mobile Number
    d) Desired option for receiving verification Code from the drop-down menu

4. Select the user role from the drop-down menu
5. Select **Assign User Role**
6. Select **Submit**

The user will be redirected to the User tab and a success message will be displayed. The new user will receive an email notification indicating that the registration in CATS has been successfully initiated. The new user will have 24 hours to click on the link and complete the registration process which requires:
- Completing the User Details section
- Completing Postal/Mailing and Civic/Physical Address
- Uploading the required documents as applicable

The new user (Authorized Administrator/Read/Write user) may refer to **section 3.1** (from step 6) for guidance on creating an account and uploading the required documents in the following sections of this User Guide.

An Authorized Administrator will be required to submit the authorization document. Once the document is uploaded, the new Authorized Administrator will select **Request Participation in CATS**. The new user will receive an email notification indicating that the user profile has been updated.

A Read/Write user account will be activated after the user completes My Profile section in CATS.

Authorized Administrator and Read/Write users may contact the Authorized Agent of their organization if any corrections to their personal information are required and they are unable to do so from My Profile section. Contacting ECCC is also another alternative.

10. Authorized Agent Replacement

An Authorized Agent replacement process is initiated by the current Authorized Agent of the organization.

If the Authorized Agent is unable to perform the replacement process, the organization must communicate with ECCC.
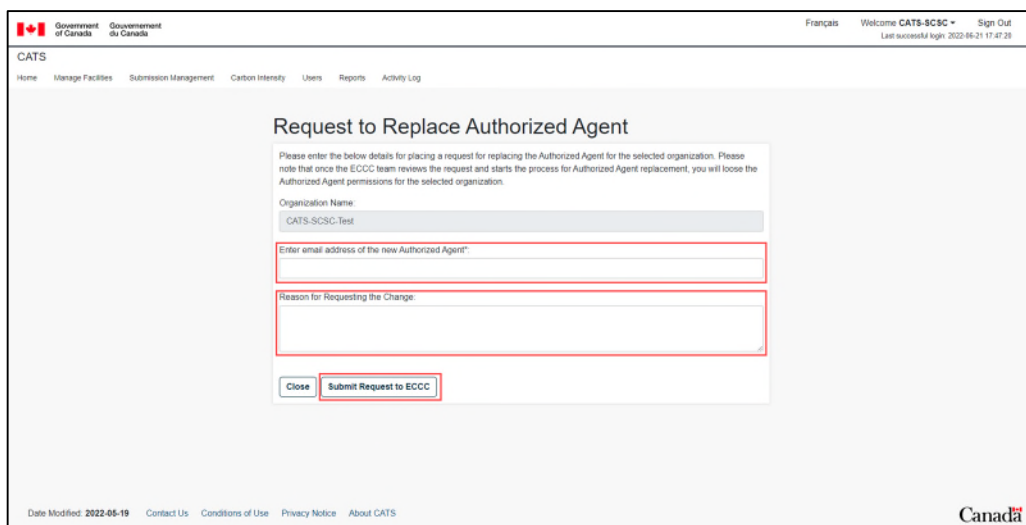
The new Authorized Agent may be:

- a user already registered in CATS under another user role within the same organisation, or
- a user not registered in CATS.

The steps below describe the process for each of the two scenarios.

10.1 User to become Authorized Agent - Already registered in CATS

To request the replacement of the Authorized Agent by an organization user already registered in CATS as an Authorized Administrator or Read/Write user, follow the steps below:

1. Navigate to the **Home** tab.
2. Select **View Registration Details**.
3. Navigate to **Actions** drop-down menu of the latest active version of the registration report.
4. Select **Request Authorized Agent Replacement** prompting the new window to display.
5. Enter the **Email address of the new Authorized Agent**.
6. Enter the **Reason for Requesting the Change**.
7. Select **Submit Request to ECCC**.

Figure 117: Request to Replace Authorized Agent

Clean Fuel Regulations Credit and Tracking System: User Guide for Primary Suppliers, Registered Creators and Foreign Suppliers – v. 1.1

97

8. A success message will be displayed confirming that the request has been submitted successfully to ECCC and the Actions drop-down menu associated to the active registration report will now indicate **View Authorized Agent Replacement Request**.

   Upon ECCC approval, the new Authorized Agent will receive an email notification indicating that the replacement of Authorized Agent has been approved.

9. The new Authorized Agent must log in to CATS to upload the Authorization Document and Identity Verification Document (**Appendix A: Identity Verification Document** and **Appendix B: Authorization Document**) in order to complete the process.

10. Once the documents are uploaded, select **Request Participation in CATS** (**Figure 118**).

11. After ECCC has approved the submitted documents, the current authorized agent will receive an email notification informing the user that the Authorized Agent Request has been accepted.

    The new Authorized Agent will receive an email notification indicating that the CATS profile has been updated.

    This completes the Authorized Agent replacement process.

Figure 118: Request to Replace Authorized Agent - Upload Identity and Authorization Documents

10.2 User to become Authorized Agent - Not registered in CATS

To request the replacement of the Authorized Agent by an organization user not registered in CATS, follow the steps below:

1. Navigate to the **Home** tab.
2. Select **View Registration Details**.
3. Navigate to **Actions** drop-down menu of the latest active version of the registration report.
4. Select **Request Authorized Agent Replacement** prompting the new window to display.

5. Enter the **Email address of the new Authorized Agent**.
6. Enter the **Reason for Requesting the Change**.
7. Select **Submit Request to ECCC**.
8. A success message will be displayed confirming that the request has been submitted successfully to ECCC and the Actions drop-down menu associated to the active registration report will now indicate **View Authorized Agent Replacement Request**.

   Upon ECCC approval, the new Authorized Agent will receive an email notification with a link to complete the registration process.

The new Authorized Agent must:

9. Complete the required information (**Figure 119**).
10. Select **Proceed to Next Step**.

Figure 119: Request to Replace Authorized Agent - Registration in CATS

11. The user will be directed to secure Sign-In pages.
    In case of any error messages during the process, refer to step #5 of **section 11** to initiate the account recovery process.
12. The new Authorized Agent must log in to CATS to complete My Profile information and upload the Authorization Document and Identity Verification Document (**Appendix A: Identity Verification Document** and **Appendix B: Authorization Document**) in order to complete the process.
13. Once the documents are uploaded, select **Request Participation in CATS** (**Figure 118**). The user will receive an email notification confirming the reception of the request by ECCC.

14. After ECCC has approved the submitted documents, the current and the new authorized agent will receive an email notification informing them that the Authorized Agent Request has been accepted.

This completes the Authorized Agent replacement process.

11. Troubleshooting steps for CATS

If the user is experiencing login issues in CATS, please follow the steps below:

1. **Confirm using a compatible browser**

   CATS is supported by the latest versions of Edge, Firefox, Chrome and Safari. Internet Explorer does not support CATS.

2. **Confirm using the correct URL for CATS**

   Navigate to CATS via this link: https://marchescarbone-carbonmarkets.canada.ca.

   ▪ If the user is an Authorized Agent and has not created the CATS account yet, follow the steps in section **3. Creating an Account** in CATS and submitting Registration Reports.

   ▪ If the user already has an account, select **Login** from the CATS home page and refer to **section 2.2**.

3. **Trying to log in to CATS while logged in to (or timed out of) ECCC's Single Window, or another Government of Canada secure website that uses GCKey or Sing-In Partner**

   ▪ User must ensure being logged out of any other secure Government of Canada websites when logging in to CATS.
   ▪ Closing all browser windows and starting fresh can help, and
   ▪ In some cases, using an InPrivate or Incognito window when logging in to CATS.

4. **After attempting steps 1-2-3 above, user is still getting an error message**
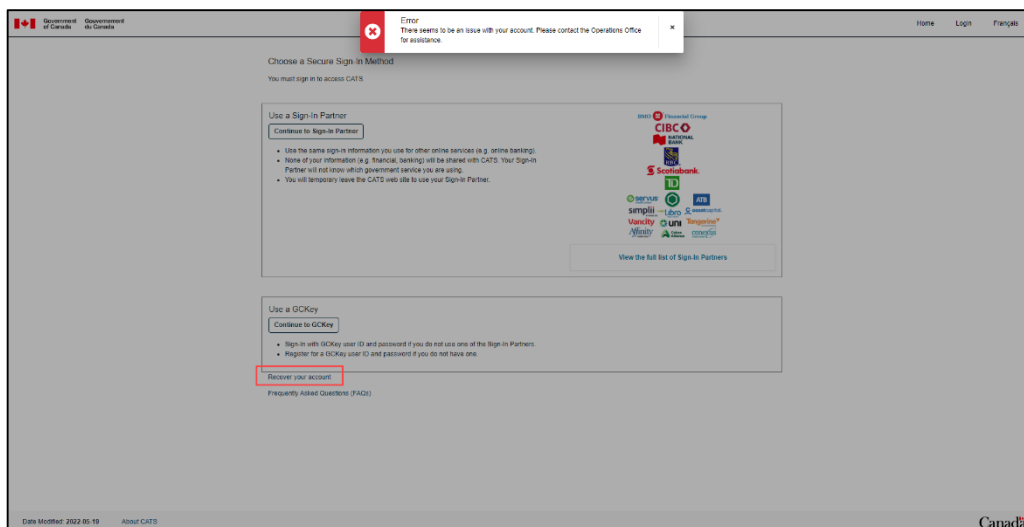
Figure 120: Login error message

The above error message can occur if the user is trying to use a GCKey or Sign-In Partner credentials that are:

- valid but not linked to the CATS profile: login again using the same credentials used on the initial account creation. If user does not remember the credentials select **Recover your account** option as illustrated above and follow the on-screen steps.

- already associated with another CATS User: it is mandatory for each CATS user to have their own unique profile and login credentials. If user suspects that others may have the same credentials, use **Recover your account** process.

5. **CATS Account Recovery Process**

Users with an existing CATS account being unable to log in are encouraged to attempt the Account Recovery Process prior to contacting the CFR Operations Office.

- Select **Recover your account** (**Figure 120**);
- Enter the email address associated with the CATS user account for CFR to be reset.
- CATS will send an email to that address with a special recovery link.
- Ensure to log out of any other secure Government of Canada sites.
- Open a fresh browser (Chrome, Edge, Firefox or Safari).
- Copy and paste the recovery link from the email into the browser.
- Select the preferred sign-in method.
  - For GCKey, select **Continue to GCKey**. If new credentials are needed, select **Sign Up** (instead of Sign In) and follow the on-screen instructions to create a new GCKey username, password and recovery questions. Make note of the new GCKey as this will be used for each login to CATS going forward.
  - Once new GCKey is set up, user should receive the CATS Two-Factor Authentication code, and then be logged into CATS.

If these steps do not resolve the issue, proceed to **section 2.4** and contact ECCC.

Appendix A: Identity Verification Document

Identity Verification Document is available in the 'Attachments' tab (paperclip icon) in the left navigation pane. Please download this user guide to your computer and open it in the PDF format if your web browser does not display the 'Attachments' tab.

Clean Fuel Regulations Credit and Tracking System: User Guide for Primary Suppliers, Registered Creators and Foreign Suppliers – v. 1.1

102

Appendix B: Authorization Document

Authorization documents for Authorized Agents and Authorized Administrators are available in the 'Attachments' tab (paperclip icon) in the left navigation pane. Please download this user guide to your computer and open it in the PDF format if your web browser does not display the 'Attachments' tab.