

California Air Resources Board
Compliance Instrument
Tracking System Service (CITSS)
Release 6.0 Training
Swapping Representative Roles

Training Introduction

- Release 6.0 on September 9, 2015
- New Functionality in Release 6.0
 - Swapping Account Representative Roles
 - Auction Consignment Wiring Instructions
- This presentation explains the functionality for swapping Account Representative Roles.
- Release 6.0 Information is Available on ARB's CITSS Webpage at www.arb.ca.gov/citss

Purpose of Swapping Representative Roles

- Response to frequent need to change user roles
- CITSS simplifies the process of swapping account representative roles.

Swapping Representative Roles

- An active Alternate Account Representative (AAR) or Account Viewing Agent (AVA) can swap user roles with an active Primary Account Representative (PAR).
- Registrar approval is required to change account representatives.
- Complete the “Request to Change Account Representatives/Account Viewing Agents” form.
- The form can be obtained from the ARB website at: www.arb.ca.gov/citss.
- Submit the completed form with original signatures to the Registrar for approval.

Representatives and AVA Tabs

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My User Profile

Account Registration

Representative Reports

Glossary

Ferrite Firewalls

This page shows information for your account or set of accounts. You may propose changes to the information listed under the General and Contact Information pages by selecting Edit Information at the bottom of the pages. You can remove or propose changes to Representatives, and Account Viewing Agents under their respective tabs. You can indicate your intent to participate in the next scheduled auction under the Auction Tab.

General Account
Compliance Account

General
Contact Information
Representatives
Account Viewing Agents
Holding Limits
Auction
Facilities

Representative Type	Current Representative	Status	Effective Date	End Date	Actions
Primary Account Representative	Frank Smith	Active	2015-08-13		Change
Alternate Account Representative	Floyd Jones	Active	2015-08-13		Swap with PAR Remove
Alternate Account Representative	Francis Miller	Active	2015-08-13		Swap with PAR Remove

3 records

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Current Account Viewing Agent(s)	Status	Effective Date	End Date	Actions
Ethan Smith	Active	2015-09-01		Swap with PAR Remove

1 record

PAR/AAR Swap Proposed

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i Representative change proposed successfully.

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General Account **Compliance Account**

Proposed Data Changes | General | Contact Information | **Representatives** | Account Viewing Agents | Holding Limits

Auction | Facilities

Representative Type	Current Representative	Status	Effective Date	End Date	Actions
Primary Account Representative	Frank Smith	Active	2015-08-13		
Primary Account Representative	Floyd Jones	Pending			Cancel
Alternate Account Representative	Floyd Jones	Active	2015-08-13		
Alternate Account Representative	Francis Miller	Active	2015-08-13		Remove
Alternate Account Representative	Frank Smith	Pending			Cancel

5 records

PAR/AAR Swap Approved

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Representative Type	Current Representative	Status	Effective Date	End Date	Actions
Primary Account Representative	Floyd Jones	Active	2015-09-01		Change
Primary Account Representative	Frank Smith	Retired	2015-08-13	2015-09-01	
Alternate Account Representative	Francis Miller	Active	2015-08-13		Swap with PAR Remove
Alternate Account Representative	Frank Smith	Active	2015-09-01		Swap with PAR
Alternate Account Representative	Floyd Jones	Retired	2015-08-13	2015-09-01	

5 records

Additional Resources

- **CITSS User Guide and Reference Documents**
 - CITSS webpage: <http://www.arb.ca.gov/citss>
- **CITSS Help Desk**
 - Phone: 1-866-682-7561
 - E-mail: help@wci-citss.org
 - CITSS webpage: <http://www.arb.ca.gov/citss>
- **Cap-and-Trade Program**
 - Phone: 916-322-7072
 - ARB Cap-and-Trade Program webpage:
<http://www.arb.ca.gov/cc/capandtrade/capandtrade.htm>

Thank You

- Thank you for listening to the CITSS Release 6.0 training on Swapping Representative Roles.