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Architecture & Digital Operations

User Interface Manual

CBAM – Declarant Portal

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1 INTRODUCTION

1.1 DOCUMENT PURPOSE

The purpose of this document is to explain to the end-users of the CBAM declarant portal how to use it and benefit from its added value. This document provides help to get general information on the system, how to get started with the system and finally how to use the system with specific roles.

1.2 TARGET AUDIENCE

The target audience for this document includes:
- Importers of CBAM goods into the EU or their indirect representatives (CBAM declarants)[1];
- Directorate-General Taxation and Customs Union (DG TAXUD)'s Project team;
- DG TAXUD Unit C2 CBAM, Energy and Green Taxation;
- DG TAXUD Unit B3 Customs Systems;
- Directorate General for Informatics (DIGIT);
- Directorate-General for Climate Action (DG CLIMA);
- EU Member states and their National Competent Authorities;
- SOFT-DEV Project team;
- QA5 Project team;
- Operational teams.

1.3 SCOPE

The scope of this document is to provide directions to CBAM Declarants on the effective utilisation of the CBAM Declarant Portal. The features described comply with CBAM release 2.2.

1.4 STRUCTURE

This document is organised as follows:
- **Chapter 1 – Introduction**: describes the scope and the objectives of the document;
- **Chapter 2 – General Information**: provides the practical and theoretical details for the topics covered in the document;
- **Chapter 3 – Getting Started**: details how to access the portal and introduces the generic User Interface features and basic system functions;
- **Chapter 4 - Using the System for a specific business component**: describes the access to the pages and the actions that can be performed based on the business component.

1.5 REFERENCE DOCUMENTS

The table below lists the documents that are referred to in the current document.

Ref.	Title	Originator	Version	Date
No reference documents.				

<div align="center">**Table 1: Reference documents**</div>

1.6 APPLICABLE DOCUMENTS

The table below lists the documents to which the current document must be compliant (e.g. FWC, SC, RfA).

Ref.	Title	Originator	Version	Date
A01	Framework Contract	TAXUD/2021/CC/162	N/A	24/06/2021

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[1] More information available on https://taxation-customs.ec.europa.eu/carbon-border-adjustment-mechanism_en#cbam

Ref.	Title	Originator	Version	Date
A02	SOFT-DEV Framework Quality Plan	SDEV-FQP	1.00	10/01/2023
A03	Specific Contract 19	TAXUD/2024/DE/121	N/A	22/03/2024

Table 2: Applicable documents

1.7 ABBREVIATIONS & ACRONYMS

For a better understanding of the present document, the following table provides a list of the principal abbreviations and acronyms used.

Abbreviation/Acronym	Definition
AMM	Authorisation Management Module
CBAM	Carbon Border Adjustment Mechanism[2]
CBAM TR	CBAM Transitional Registry
COM	The Commission
DTCA	Decision-taking Competent Authority
EORI	Economic Operator Registration and Identification[3]
EU	European Union
HRZ	Horizontal
MS	Member State
NCA	National Competent Authority
UI	User Interface
UUM&DS	Uniform User Management & Digital Signature[4]
QA	Quality Assurance

Table 3: Abbreviations and acronyms

1.8 DEFINITIONS

For a better understanding of the present document, the following table provides a list of the principal terms used.

Term	Definition
Applicant	An importer established in a Member State or an indirect customs representative who applies for the status of an authorised CBAM declarant.
Business component	The CBAM system is separated in different business components depending on the type of business that an actor is involved. Examples of business components covered in CBAM are amongst others: Authorisation management module, certificate management or declaration lifecycle management.
CBAM Goods	Goods listed in Annex I of CBAM Regulation. More details are provided in: https://eur-lex.europa.eu/eli/reg/2023/956/oj.
Competent Authority	The authority of a Member State responsible for registering the authorised CBAM declarant in the CBAM registry, processing applications for authorisation, and maintaining relevant information. There is only one CBAM

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[2] More information available on https://taxation-customs.ec.europa.eu/carbon-border-adjustment-mechanism_en#cbam.

[3] More information available on https://taxation-customs.ec.europa.eu/customs-4/customs-procedures-import-and-export-0/customs-procedures/economic-operators-registration-and-identification-number-eori_en.

[4] More information available on https://customs-taxation.learning.europa.eu/course/view.php?id=494&section=1

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Term	Definition
	Competent Authority per Member State; therefore, it is identified by the country code. In the following, two types of Competent Authorities are distinguished: Decision-taking Competent Authority: this is the Competent Authority of the country where the applicant or declarant is established. It holds the authority to make decisions regarding CBAM authorisations within its own country. Other Competent Authorities: these are Competent Authorities in the Member State, excluding the decision-taking Competent Authority. While they have supporting roles by providing information on the applicant during the consultation procedures, they do not have the final decision-taking authority for CBAM authorisations granted by the decision-taking Competent Authority.
Declarant	This means an authorised CBAM declarant, which is an importer established in a Member State or an indirect customs representative appointed by an importer, who is authorised to import goods into the customs territory of the European Union under the CBAM framework.
Economic Operator	Refers to a business or individual engaged in activities that fall under the regulations of the CBAM. This typically includes importers or producers of goods whose carbon emissions are subject to the CBAM regulations. These operators are responsible for complying with the CBAM s requirements, which may involve reporting the carbon content of their goods and paying carbon costs.
Importer	Either the person lodging a customs declaration for release for free circulation of goods in its own name and on its own behalf or, where the customs declaration is lodged by an indirect customs representative in accordance with Article 18 of Regulation (EU) No 952/2013, the person on whose behalf such a declaration is lodged.
Indirect customs representative	A customs representative appointed by an importer established in a Member State. If the importer appoints an indirect customs representative and they agree, they can act as an authorised CBAM declarant and submit the application for an authorisation on behalf of the importer. The indirect customs representative is liable for all operations made for the importers it represents.
NCA	National Competent Authority.
Operator	Any person who operates or controls an installation in a third country.
Representative	The indirect representative declared in imports customs declaration.
Third country	A country or territory outside the customs territory of the Union.

Table 4: Definitions

2 GENERAL INFORMATION

2.1 SYSTEM OVERVIEW

The Declarant Portal User Interface facilitates the management of the CBAM Regulation, from the application lodging for an authorisation to the decision granting by the Competent Authority.

The overall CBAM system covers several business components and is also composed of a horizontal component which provides functionalities that can be used horizontally by all business components (e.g. notifications, email preferences, document management). The Declarant portal only covers the Authorisation management module (AMM) as business component.

In practice, several User Interface systems cooperate with the Declarant portal providing an integrated solution allowing interactions between economic operators, national Competent Authorities, the commission and other IT applications.

More information about the CBAM system is available on https://taxation-customs.ec.europa.eu/carbon-border-adjustment-mechanism_en#cbam.

2.1.1 Authorisation Management Module

To comply with the EU's Carbon Border Adjustment Mechanism (CBAM), importers must obtain a CBAM Authorisation. This authorisation is essential for importing regulated goods into the EU, ensuring that the carbon reporting and payment obligations set by the EU to reduce carbon leakage are met.

The Authorisation Management Module allows to request a CBAM Authorisation and manage all related tasks. It serves as entry point to initiate the process, track the application status, and handle the ongoing authorisation.

The Authorisation management module includes the following processes:
- Authorisation granting;
- Amendment;
- Revocation;
- End revocation;
- Re-assessment;
- Information which may affect the status or content of the decision;
- Right to appeal;
- Request for additional information;
- Guarantee registration;
- Guarantee adjustment;
- Guarantee release.

In particular, in the context of AMM the following components are related to user interaction:
- Declarant Portal User Interface: this is devoted to all actions required by economic operators.
- National Competent Authority Portal User Interface: this is devoted to all actions required by Competent Authorities.
- Commission Portal User Interface: this is devoted to all actions required by the commission.

2.2 AUTHORISED USE PERMISSION

CBAM Declarant Portal is allowed to be used by importers of CBAM goods (or their indirect representative) who are registered in UUM&DS. Please contact your national CBAM helpdesk to get help to register and get permissions on UUM&DS.

Further details on the required roles and responsibilities can be found in the section "Roles and Responsibilities".

2.3 USER SUPPORT

CBAM Declarants need to contact their respective National Competent Authority Service Desk both for business & technical issues.

2.4 SUPPORTED BROWSERS

The application is relying on the browser compatibility of the latest and the 2 previous versions of common web browsers (Google Chrome, Mozilla Firefox, Microsoft Edge Chromium, Safari). More information can be found on the browser compatibility page of eUI in the following link: https://eui.ecdevops.eu/eui-showcase-dev-guide-17.x/docs/00b-general-infos/04-browsers-support.

3 GETTING STARTED

Access to CBAM Declarant Portal is only allowed to economic operators who have registered in UUM&DS.

Their respective NCA are responsible to assign the allowed roles in UUM&DS.

3.1 ACCESS THE CBAM DECLARANT PORTAL

Access to the Declarant Portal is established via UUM&DS. UUM&DS is used to authenticate the economic operator. Upon successful login to the Declarant Portal, the user will be directed to the Homepage. Please contact your national CBAM helpdesk for information about the actual procedure to connect to the portal via UUM&DS and for support about any issue with this matter.

3.2 NAVIGATION MAP

The Declarant Portal is used by the economic operator for interacting with the other CBAM actors (NCA and the COM) in the scope of CBAM activities.

The menu – available on the left-hand side of each page of the CBAM application – is given in Table 5.

Block	Action	Description
-	Homepage	Allows the user to access the home page.
-	CBAM TR	Allows the user to navigate to the CBAM Transitional Registry.
Authorisations	New application	Allows the user to create a new application. More information is given in the section "Submit a new application".
	My applications and authorisations	Allows the user to view all applications and authorisations.
	My drafts	Allows the user to view their saved drafts.
Notifications	Notifications list	Allows the user to view all the notifications they have received.
Submissions	Submissions list	Allows the user to view all their submissions.
Account	Email preferences	Allows the user to view and configure the email preferences.

Table 5: Declarant Portal menu

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3.3 ROLES AND RESPONSIBILITIES

Access to specific pages and actions is determined by defined roles. The table below outlines each role available in the CBAM Declarant Portal and its corresponding accessible pages and actions.
Note that the "AMM Administrate information" and "AMM Submit information" roles give access to the same pages; only the available actions are different.

Roles	Pages/functionalities	Applicable business component
HRZ View information	This role is needed for any user connecting to the Declarant portal in order to access the general pages of the system.	All
AMM View information	This role is proposed for any user needing to access the information of AMM without the ability to modify them.	AMM
AMM Administrate information	This role must be assigned to a user in charge of all actions that must be performed for AMM to prepare information to be communicated to the decision taking Competent Authority. However, this role gives no rights to submit the information.	AMM
AMM Submit information	This role must be assigned to a user in charge of the effective submission of the information relevant to AMM to a decision taking Competent Authority. In practice, this role is also authorised to prepare the information and is therefore a complete role with all rights.	AMM

Table 6: Security roles

3.4 GENERIC USER INTERFACE FEATURES

This section provides an explanation on the different generic User Interface features that can be found on the CBAM portal. The following sections can be found: Header, Footer, Tooltips, Validation of a form, Read-only and editable modes, General error messages and Language.
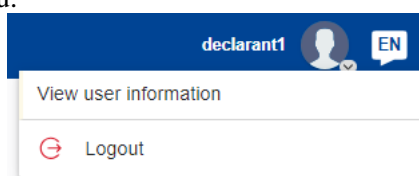
3.4.1 Header

The header, which is displayed on each page, contains a button to display/hide the navigation menu, the European Commission logo, the title of the application, the logged-in username, the user icon and the language selector.

Figure 1: Header

When clicking on the user icon, the user can either view its user information (identification number, name, country…) or log out. To change the language, the user can click on the displayed language and select the desired one in the menu.

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Figure 2: Details when clicking on the user icon

3.4.2 Footer

The footer, which is displayed on each page, contains the "© European Commission" copyright, the indication of the current version of the system, a link to the privacy statement website of the European Commission, a link to the user manual and a link to the legal notice.

© European Commission   •   Version: 2.2   •   Privacy statement   •   User manual   •   Legal notice

Figure 3: Footer

3.4.3 Tooltips

The tooltips are used to provide extra information on some elements. An info icon 🛈 indicates the availability of a tooltip, and the tooltip text appears when the user hovers over it with its cursor.

Figure 4: Tooltip

3.4.4 Validation of a form

When the user fills in a form, the system verifies that the data has been properly entered according to the given rules. The validation of a form is performed in two steps:

- **Syntactic validation**, performed at client-side;

- **Semantic / business validation**, performed at server-side.

The process is depicted in the figure below. Once the syntactic validation is successful, the semantic/business validation is performed (at submission of the form). If the latter is successful as well, the form is finally submitted.
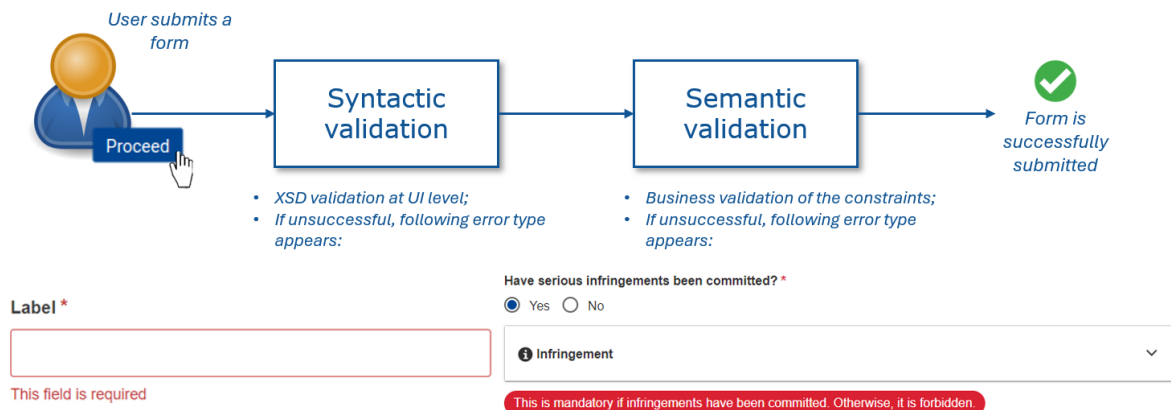
Figure 5: Validation of a form

3.4.4.1 Syntactic validation

With the syntactic validation, the following is checked: the cardinality (mandatory or optional) and the format of a field. A field is validated while the user types and when the user clicks on the "Submit" button. Such validation is directly visible in the User Interface, while the user completes a form.

In case such validation is not satisfied, a corresponding message is displayed below the field, marked as invalid and highlighted in red.

Label *

This field is required

Figure 6: Text field in error due to syntactic validation
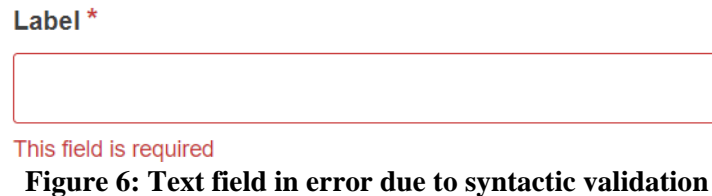
3.4.4.2 Semantic validation

With the semantic validation, the business rules are checked (e.g. one field out of two must be filled out, but not both). A field is validated only when the user clicks on the "Submit" button. Hence, such validation is not directly visible when the user completes a form; they must submit the form in order to see the error message(s). In case a field is not correctly filled in according to the business rule(s), an error message in a red box appears under the data group or element.

ⓘ Importers

Add

This is mandatory if the applicant is an indirect customs representative. Otherwise, it is forbidden.

Figure 7: Text field in error due to semantic validation

3.4.5 Read-only and editable modes

The system has two modes: read-only and editable. These modes control what users can do, ensuring that important information is protected while allowing necessary updates.

In read-only mode, users can look at information but cannot make changes. This mode is useful for reviewing without the risk of accidentally changing anything. Examples of elements displayed in read-only mode: list pages (notifications list, submissions list,…), view pages (view application, view notification, view process data, …).

In editable mode, users can add, change, or delete information, depending on their roles. This mode is designed on form elements on which input is needed from the users. Examples of elements displayed in editable-only mode: page forms (submit application, amendment request, reply pages,…), email preferences.

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3.4.6 General error messages

In case of a generic error from the system, a generic error message will be displayed at the top-right corner of the page as a pop-up notification.
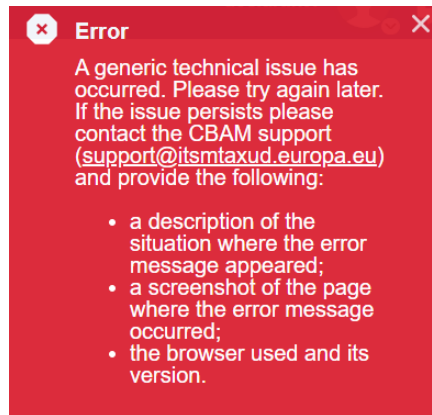
Figure 8: Example of an error message

The following error messages are displayed depending of the type of error that occurred:

Error type	Error message
Generic technical issue	A generic technical issue has occurred. Please try again later. If the issue persists, please contact the CBAM support (support@itsmtaxud.europa.eu) and provide the following: • a description of the situation where the error message appeared; • a screenshot of the page where the error message occurred; • the browser used and its version.
Access restriction	Access denied. You do not have permission to access this resource. If you believe this is an error, please contact the CBAM support (support@itsmtaxud.europa.eu).
Resource not found	Resource not found. Please try again later, and if the issue persists, please contact the CBAM support (support@itsmtaxud.europa.eu).

Table 7: General error messages

3.4.7 Language

The system is available in the different EU languages, which allows the user to use the system in their own language. Note that the translations are applied for each label and tooltip separately in order to provide a maximum of textual information in the language of the user. Hence, some labels might not be translated in the selected languages. By default, the selected language is the one previously chosen in the header, or if none is specified, it defaults to the browser's language.
The user is able to manually change the language of the system from the header. More information is provided in the section "Header".

3.5 BASIC SYSTEM FUNCTIONS

3.5.1 List and tables

Several list pages are present in the application. The following features are available in order to enhance the results' consultation: pagination, sorting and filtering.

3.5.1.1 Pagination

The pagination capability can be available in editable and read only mode at the bottom of a list page or of a table.

The maximum number of results to display per page can be configured by the user. By default, 20 results are displayed per page. The user is allowed to choose between 10, 20, 50, 75 or 100 displayed results per page. A navigation bar allows navigating among the different pages.
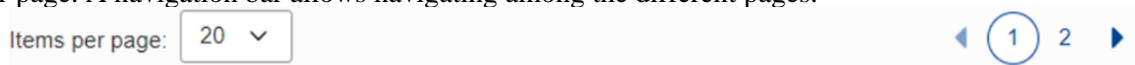
Figure 9: Pagination of a list

For data tables, the maximum number of entries shown is 5 per page of the data table.

Users can navigate through the pages using a navigation bar with hyperlinks. This allows moving sequentially (e.g., from page 1 to 2, then 2 to 3, etc.) using the previous and next buttons. If the user is on the first or the last page, the corresponding link is not active.

3.5.1.2 Sorting

The sorting capability can be available in edit and read only mode. When it is available, a clickable sorting icon is displayed next to the column title and will allow the user to sort the result in ascending or descending order. When enabled, the sorting is applied to the results of all pages.

By default, records with an empty value will be displayed at the bottom of the list when sorting on ascending order and at the top when sorting on descending order.

When sorting is done on alphanumeric fields, the order does not depend on the use of upper- or lower-case letters. Criteria related to a code list are sorted according to the code and not the description of the code.

Figure 10: Sorting applied on the first column of a list

3.5.1.3 Filtering and wildcards

The filtering capability can be available in edit and read only mode. When it is available, an editable field box is displayed below the column title and will allow the user to filter the results based on the entered value. The filtering is case insensitive.

When wildcard search is activated, the user can search with the use of the asterisk (*) or the percent (%) symbols to match any number of characters. Therefore, a query for which the reference number is CBAM-DE* (or CBAM-DE%) will retrieve all reference numbers starting with "CBAM-DE".

Wildcard search is activated on the following pages:
- Notifications list
- Submissions list

Figure 11: Filtering applied with wildcard search

3.5.2 Homepage

When connecting to the system, the user is automatically directed to the homepage. However, to come back to this page, the user can click on the "Homepage" button of the CBAM Declarant Portal menu (see section "Navigation Map").
On this page, the user can see a set of widgets focusing on the elements requiring some attention.

3.5.2.1 Notifications widgets

The widgets "Unanswered notifications" and "Unread notifications" both provide a filtered view of received notifications by the economic operator.

The "Unanswered notifications" widget includes all notifications for which an answer is expected (i.e. "Request" = "Yes" and "Answered" = "No"). The "Unread notifications" widget includes all notifications for which the status is "Unread".

From these widgets, the user can directly access a specific notification detail or view the complete list of notification by clicking on the title of the widget.

Figure 12: Notification widgets

3.5.3 Attachments

When an attachment is expected in an editable form, the user can add a new attachment by clicking on the "Add new" button above the attachments table.


Figure 13: Add new button

Then, the upload attachment capability allows the user to select a file using the dedicated button or drag and drop a file into the delimited upload area. The maximum allowed file size is 20MB, and java, python, and other executable scripts are not allowed.
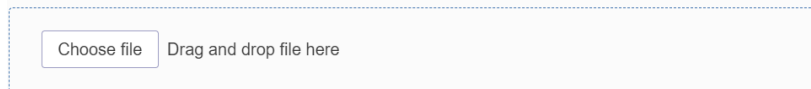
Figure 14: Upload attachment area with drag and drop capability

Once uploaded, the file information is displayed below the upload area, allowing to delete the file before adding the attachment in the user form. The user can also enter additional document information before inserting it in the form.
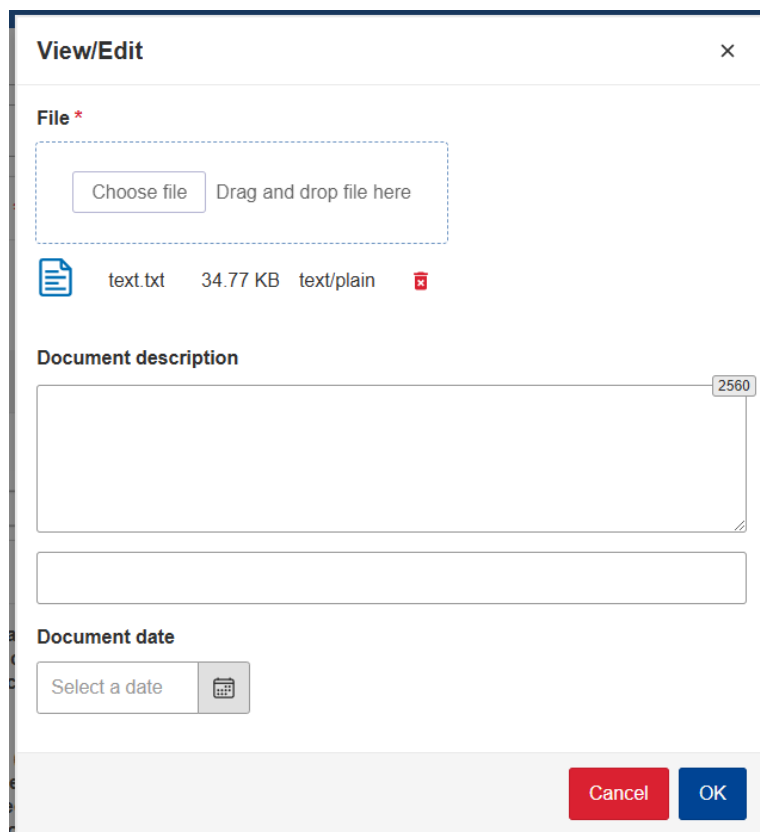
Figure 15: Upload of an attachment

The attached documents are displayed in a data table. In editable mode, the user can edit the document information, download the file and remove the document and its associated information. It is also possible to remove all documents by clicking on the "Remove all" button at the top of the table.
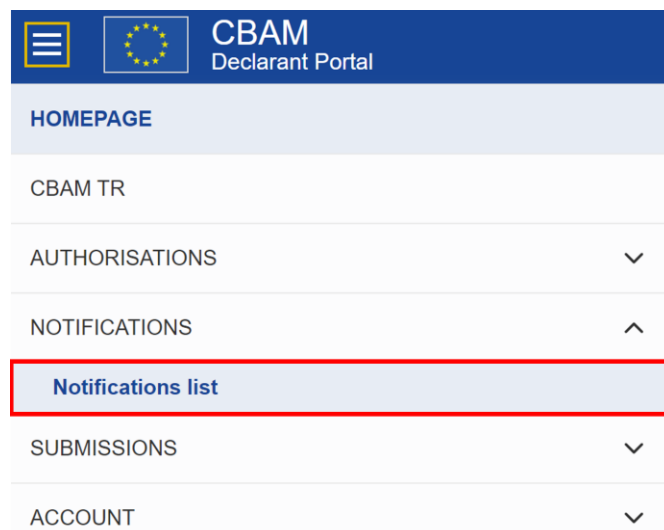

Figure 16: Editable view of the attachments

In read-only mode, the user can download the attached document, but they have no possibility to update the table.

3.5.4 Notifications management

To view the list of received notifications, the user can click on "Notifications list" in the "Notifications" drop-down of the CBAM declarant portal menu (see section "Navigation Map").

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Figure 17: Notifications list button in the CBAM declarant portal menu

The user is then redirected to the "Notifications list" page, displaying the list of all received notifications, with different information given in each column.

Figure 18: Notifications list in the CBAM declarant portal

Notifications can be of two kinds:
- Simple notifications informing the economic operator about new information. Example: status changes, new decision…
- Requests for which the economic operator must provide an answer. Example: request for additional information.

In particular, the list of notifications contains amongst others:
- The sender information. In the context of the Declarant Portal it essentially corresponds to the country of the Competent Authority. Note that no identifier is provided when the sender is a country or the commission.
- The reference number corresponds to the reference number of the object (e.g. application, authorisation) related to the notification.
- The business context of the notification. In the case of the declarant portal, only authorisation management is supported for the time being.
- An indication if the notification is a simple information or a request to be answered (see "Request" column);
- The status of the notification:
  - Unread: specifies that the notification has not been read by the user;
  - Read: specifies that the notification has been read by the user. Note that as soon as the notification is opened, the notification is automatically marked as read;
- In case of a request, it contains an indication if it is answered (see "Answered" column);

o No: specifies that the request has not been answered yet;
o Yes: specifies that the answer has been submitted. Note that even if the answer is saved as a draft, the status is not changed until the effective submission.
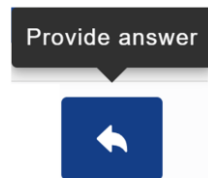
For each displayed notification, the user can click on the related "View notification" button in the actions column of the table to view all the information of one specific notification.
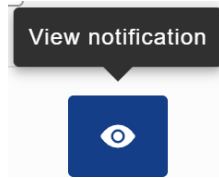
Figure 19: View notification button

3.5.4.1   How to provide an answer to a notification?

On the "Notifications list" page, some notifications are displayed with a "Provide answer" button in the actions column of the table.

Figure 20: Provide answer button on the notifications list page

When this button is displayed for a received notification, it means that an answer to the notification is expected from the declarant.
To do so, the user can either directly click on the "Provide answer" button in the list, or first consult the notification details and then click on the "Provide answer" button at the top of the page.
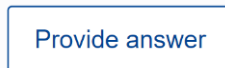

Figure 21: Provide answer button on top of the notification page

The user is then redirected to the "Reply details page", where the user must provide the requested information.

3.5.5   Submissions management

To view the list of sent submissions, the user can click on "Submissions list" in the "Submissions" drop-down of the CBAM declarant portal menu (see section "Navigation Map").
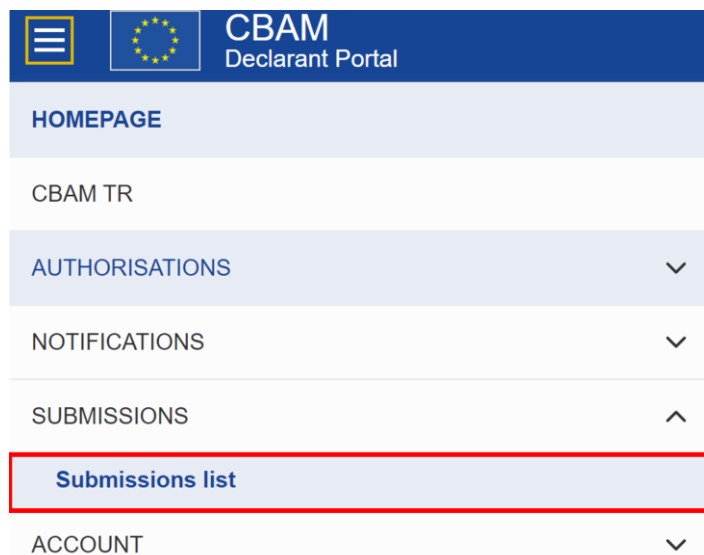
Figure 22: Submissions list button in the CBAM declarant portal menu

The user is then redirected to the "Submissions list" page, displaying the list of all sent notifications, with different information given in each column.

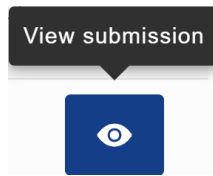**Figure 23: Submissions list in the CBAM declarant portal**

The submission can be related to the following contexts:
- An answer to a request;
- A request to trigger a new business process. Note that such possibility is defined in each business component.

In particular, the list of submissions contains:
- The recipient information (type and identifier when applicable): the recipient to which the notification has been sent. In case of a country or the commission, the identifier is not applicable.
- The reference number corresponds to the reference number of the object (e.g. application, authorisation) related to the sent notification.
- The subject of the submission.
- The business context of the sent notification. In the case of the declarant portal, only Authorisation management is supported for the time being.
- The sent time: the date and time at which the submission has been provided.

Note that for each displayed submission, the user can click on the related "View submission" button in the actions column of the table to consult all the information of one specific submission.

Figure 24: View submission button

3.5.6 Email preferences page

The email preferences page is related to a functionality in the CBAM Declarant portal that allows the user to receive email notifications related to the notifications that they receive inside the portal itself.

To consult the email preferences page, the user can click on "Email preferences" in the "Account" drop-down of the CBAM declarant menu (see section "Navigation Map").
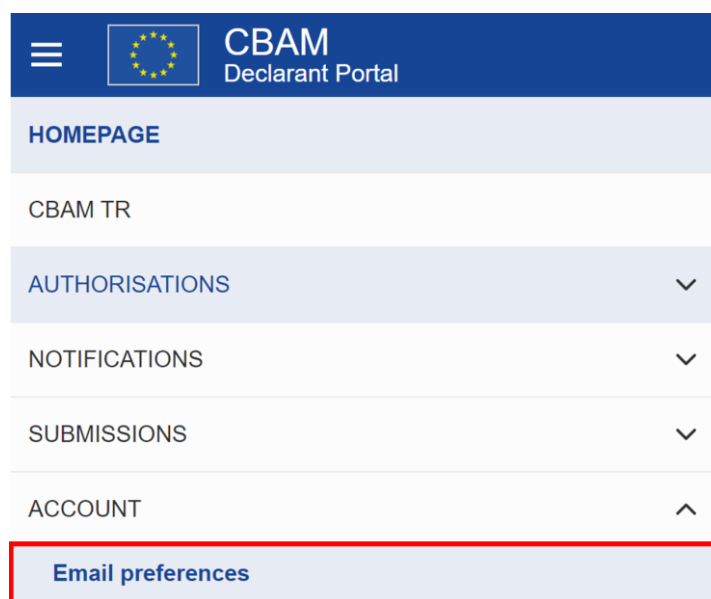
Figure 25: Email preferences button in the CBAM declarant menu

On this page the user can provide several email addresses for each business context, and for each address they must provide the language in which they wish to receive the emails and also indicate if they want to receive the email alerts for new notifications with that address.

To add a new email preference, select "Add new" in the table relevant for the business context in which you need to receive email alerts:
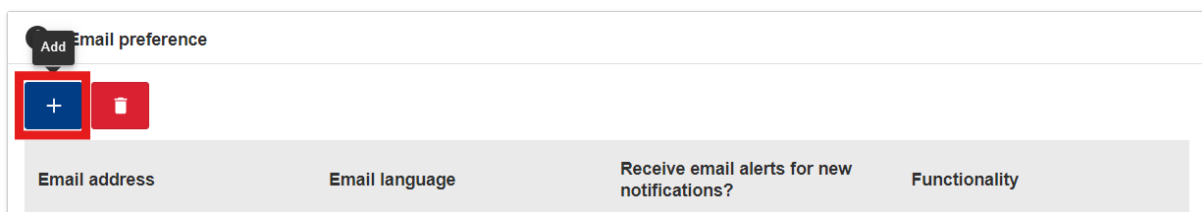
Figure 26: Add new email preference

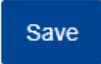Then, complete the information required. Set "Receive email alerts for new notifications" as "Yes" to activate the functionality and click on "Ok".

Figure 27: View/edit new email preference

At the bottom of the page, save the new preferences.

Figure 28: Save email preference

As soon as the indication is positive, all new notifications relevant for the indicated business context received by the economic operator identified with an EORI number will be notified by email with non-sensitive information.

Note that for each mentioned email address, the user can test the link with the email address by clicking on the "Send test email" button.

Figure 29: Send test email

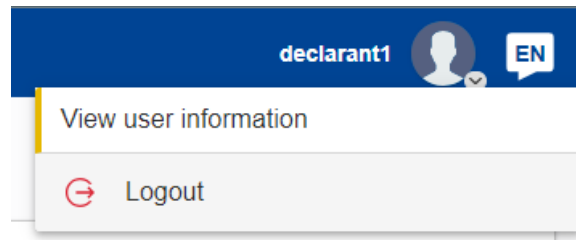## 3.6   EXIT THE CBAM DECLARANT PORTAL

When the user wants to exit the CBAM Declarant Portal, they must click on the "Logout" button located in the user drop-down, on the right-hand side of the header of the system.

Figure 30: Logout button

4 USING THE SYSTEM FOR A SPECIFIC BUSINESS COMPONENT

4.1 AUTHORISATION MANAGEMENT

The following section specifies the pages and functionalities that are specific to the Authorisation management module. The relevant pages are accessible under the block "Authorisation" in the CBAM declarant menu (see section "Navigation Map").
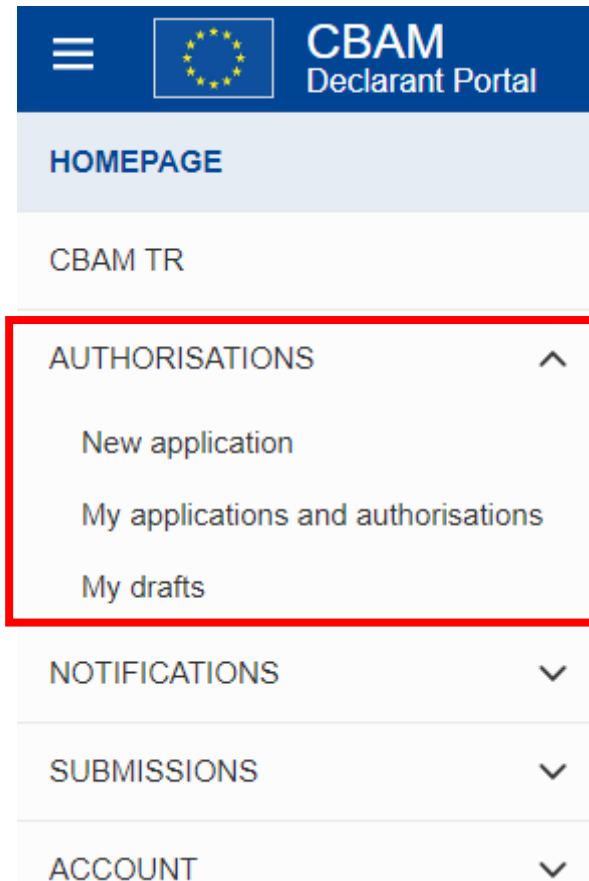
Figure 31: Authorisation management related pages

4.1.1 COMMON FUNCTIONALITIES

4.1.1.1 Prefill functionality

The prefill capability allows the user to prefill some information in an editable page with values already known by the system, that were for example provided at another step of the process.
Each prefill is associated with a clear capability, which will delete all data present in the fields that can be prefilled.

Figure 32: Prefill and clear buttons

4.1.1.2 Save for later use

On some editable pages, the user has the possibility to saves the page's form fields for later. Doing so will allow the user to save an application draft in the case of application submission or to save a reply to a request from the NCA.

Figure 33: Save for later use button

All saved drafts are listed on the "My saved drafts page". The user must click on "My drafts" in the "Authorisations" drop-down of the CBAM declarant menu (see section "Navigation Map").
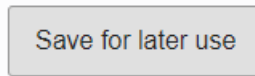
Note that the drafts remain accessible until the user decides to submit or delete them.

4.1.1.3 Actor information retrieval

On some editable pages, the user has the possibility to search the name and address data related to a specific EORI number.
Hence when filling in a form, the user can click on the button "Search actor information based on EORI number" and the name and address data related to the EORI number will be retrieved and used to pre-fill the form.
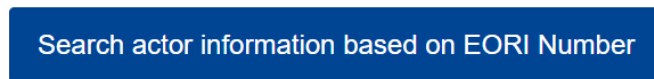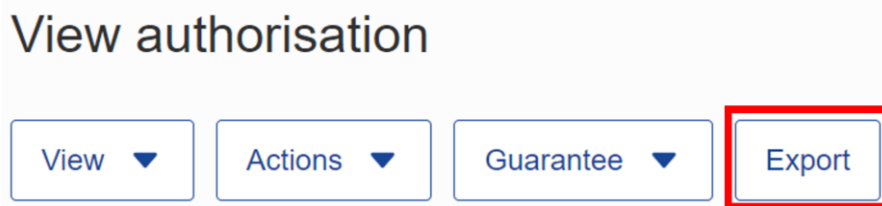

Figure 34: Search actor information based on EORI number button

4.1.1.4 Export authorisation

From the view authorisation page, the user has the possibility to generate a printable version (in the form of a PDF document) of an authorisation.
To do so the user can click on the "Export" button on the View authorisation page.

Figure 35: Export button on the view authorisation page

Then the user must select a language in which he wants to have the data exported. Then, the user can click on "Export" on the dialog, and the PDF will be automatically generated by the system.

Note that only the header and the authorisation details are exported into the document and the PDF file name follows the pattern YYYY-MM-DD-[Reference number] where the date is the current date and the reference number is the one associated with the CBAM account number associated with the exported authorisation.

4.1.2 Submit a new application

To submit an application, the user must click on the "New application" button in the "Authorisations" block of the menu (see section "Navigation Map").

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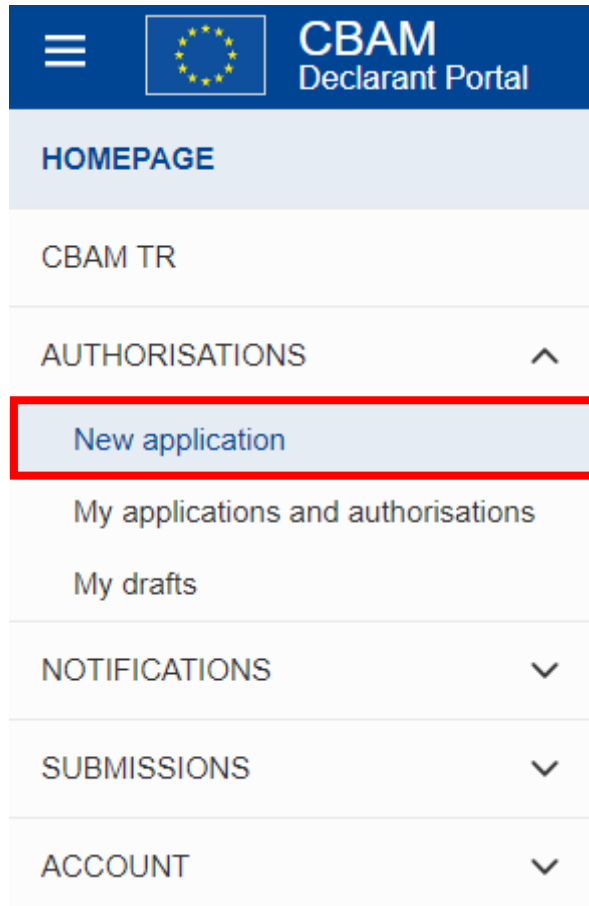
Figure 36: New application button

Clicking on this button will redirect the user on the "Submit application" page where the user must fill in the information for all different tabs.

Figure 37: Available tabs on the submit application page

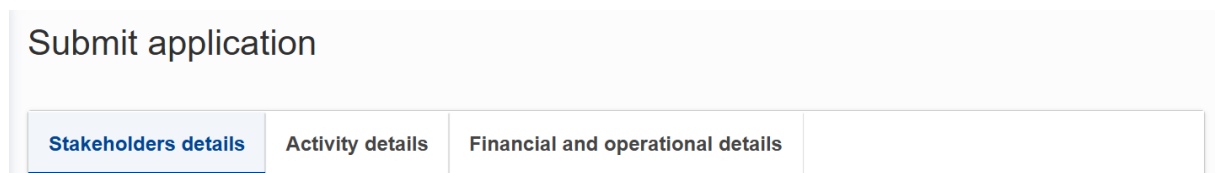When filling in and submitting the form, different errors could occur. More explanation on errors is given in the section "Validation of a form". Once the application is successfully submitted, the user is redirected to the related "View application" page.

Note that if needed, the user has the possibility to save the application draft for later use (see the section "Save for later use").

4.1.3 Find my applications and authorisations

To view the details of a specific application or authorisation, the user can click on "My applications and authorisations" in the "Authorisations" drop-down of the CBAM declarant menu (see section "Navigation Map").

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Figure 38: My applications and authorisations button

The user will be redirected to the "My applications and authorisations" page. The page displays two tables:

- The list above provides the application(s) submitted to the decision taking Competent Authority.
- The list below provides a list of authorisations owned by the declarant.

In order to see the details of a specific application or authorisation, the user must click on the associated view button, located at the right of each table.
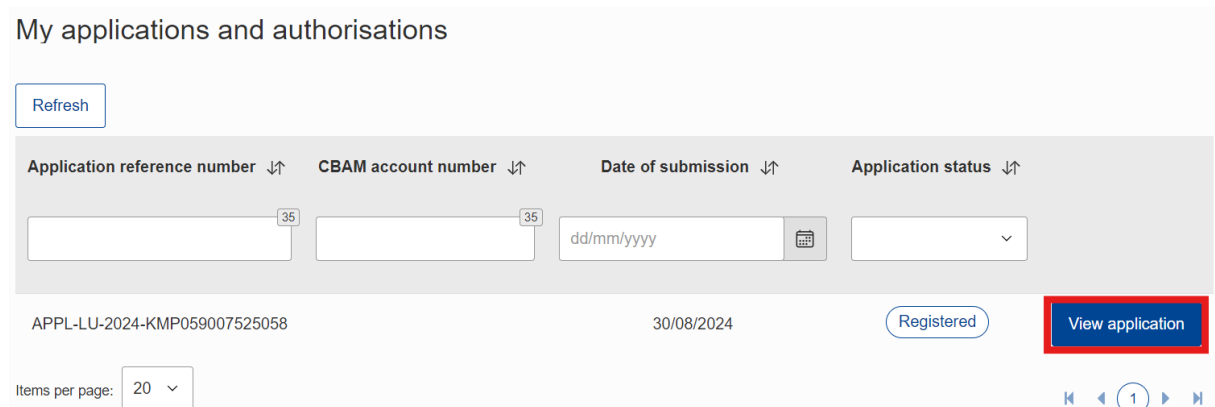
Figure 39: Example of view application button

4.1.4 View application or authorisation details

For both an application and an authorisation, the economic operator can consult the information related to the status and the processes that have been triggered.

In both cases, a preview of the main information is provided in the Application / Authorisation process data.

To access this page please refer to the section "Find my applications and authorisations".

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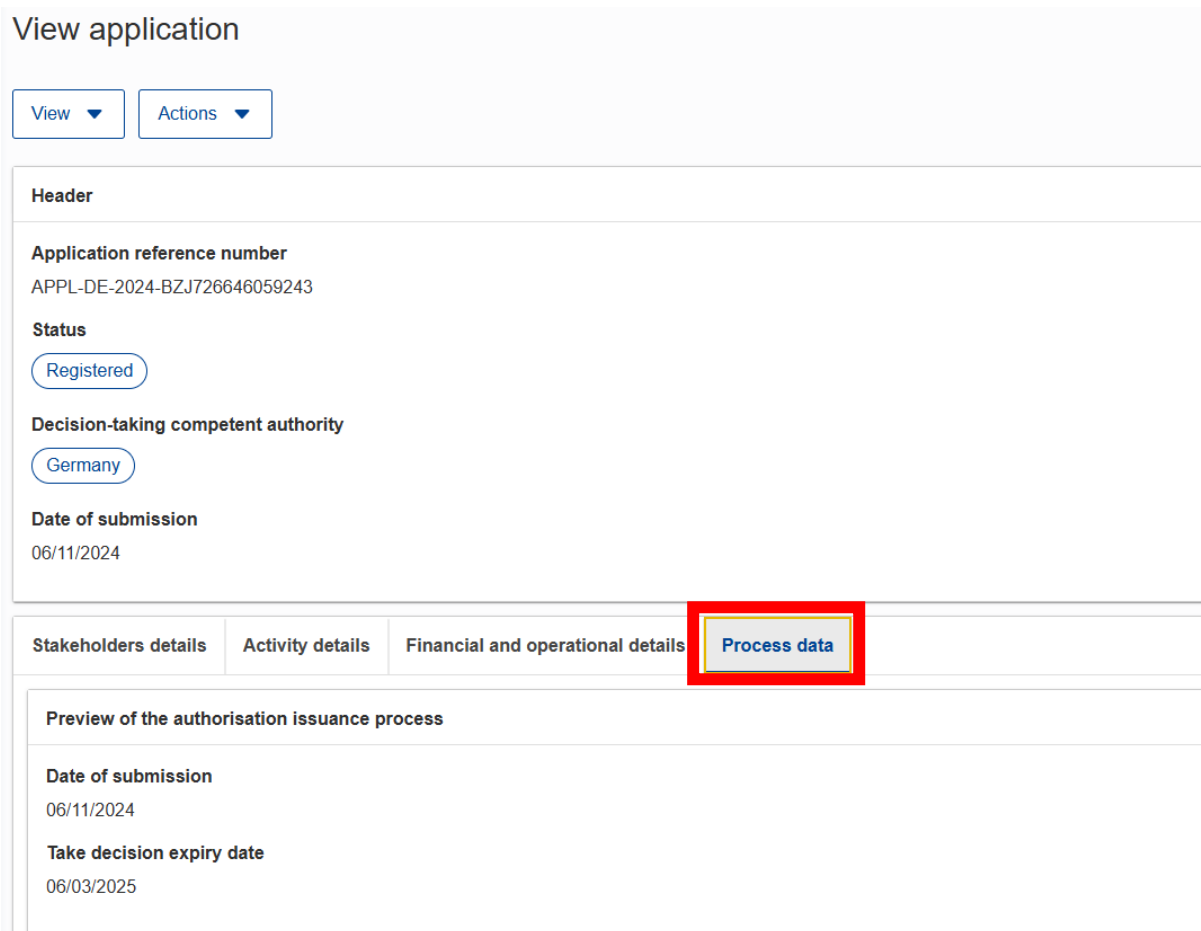
Figure 40: Example of "Process data" tab on the view application page

The following process data are available on the application details page
- Authorisation issuance process
- Request for additional information
- Request for time limit extension
- Provide adjustments
- Application withdrawal
- Appeal procedure
- Guarantee registration

The following process data are available on the authorisation details page:
- Request for additional information
- Revocation
- Right to appeal
- End revocation
- Re-assessment
- Amendment
- Information which may affect the authorisation status or content
- Guarantee adjustment
- Guarantee release.

The details of each previewed information are available when the user selects one of the displayed entities.

4.1.5 Make an action on an application

The applicant with the appropriate role can start actions on an application. Starting an action will always trigger a business process in the NCA portal and can therefore impact the status of the related application.
Regardless of the action and the application, each action is launched in the same way by clicking on the appropriate button in the application details page.

The following actions are available depending on the user role and the context:
- Adjust application: allows a user to create a proposal for application adjustments and a period of time to implement the adjustments. The functionality is only available if the status of the Application is "Registered".
- Withdraw application: allows a user to create a request to Withdraw the Application if no decision on the Application has been taken yet by the DTCA.
- Right to appeal: allows a user to access information about the right to appeal procedure. This procedure is external and cannot be launched from the Declarant Portal.

As explained in the section "Roles and Responsibilities", the "AMM Administrate information" or "AMM Submit information" is needed to trigger any action. However, only the "AMM Submit Information" gives the right to actually submit the information during any process.
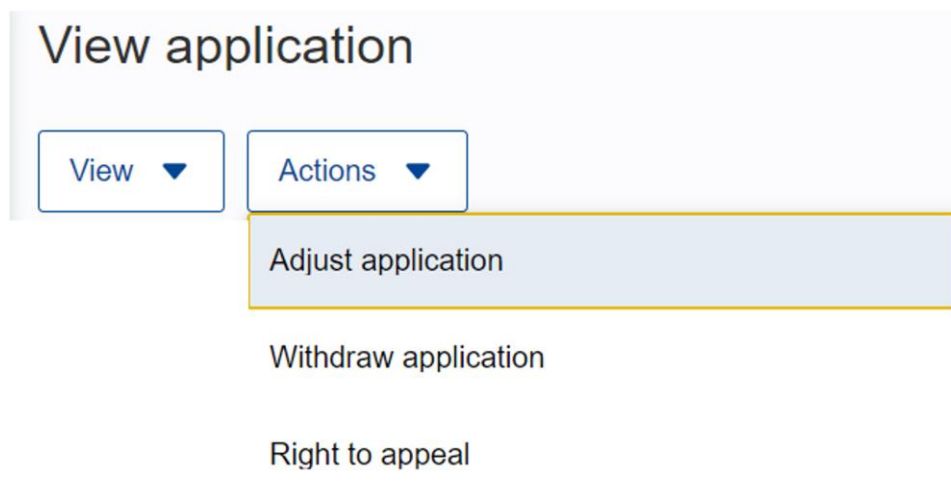

Figure 41: Actions available on view application page

4.1.6 Make an action on an authorisation

The declarant with the appropriate role can start actions on an authorisation. Starting an action will always trigger a business process in the NCA portal and can therefore impact the status of the related authorisation.
Regardless of the action and the authorisation, each action is launched in the same way by clicking on the appropriate button in the authorisation details page.

The following actions are available depending on the user role and the context:

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- Request Amendment: allows a user to create a request to amend the Authorisation. This functionality is only available in case the authorisation status is "Active" and if there is no other ongoing process for that Authorisation;
- Request Revocation: allows a user to create a request to revoke the Authorisation. This functionality is only available in case the authorisation status is "Active" and if there is no other ongoing process for that Authorisation;
- Request Revocation withdrawal: allows a user to withdraw their revocation request, before the decision on the revocation is taken by the Competent Authority. The revocation withdrawal request can be received until a final decision has been made by the Competent Authority.
- Provide information which may affect the authorisation status or content: allows a user to inform the DTCA about changes that occurred to the information originally provided in the application. This functionality is only available in case the authorisation status is "Active" and if there is no other ongoing process for that Authorisation;
- Right to appeal: allows a user to access information about the right to appeal procedure regarding the revocation. This procedure is external and cannot be launched from the Declarant Portal.

As explained in the section "Roles and Responsibilities", the "AMM Administrate information" or "AMM Submit information" is needed to trigger any action. However, only the "AMM Submit Information" gives the right to actually submit the information during any process.
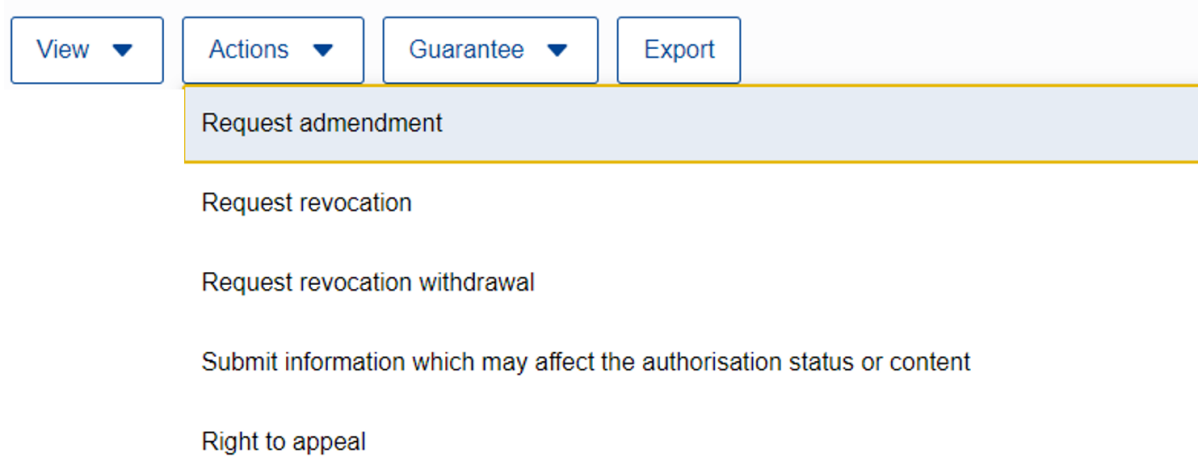
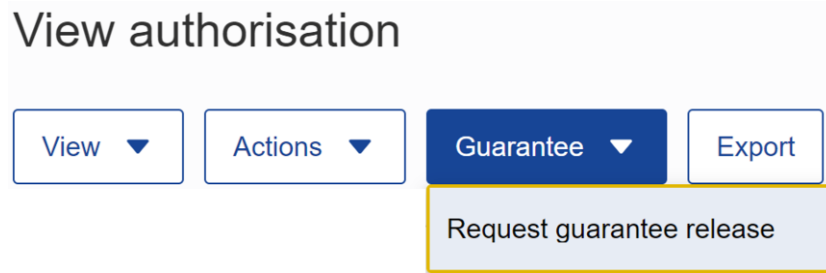**Figure 42: Actions available on view authorisation page**

4.1.6.1 Make an action related to the guarantee management of an authorisation

The following action is available depending on the user role and the context:
- Request guarantee release: allows a user to initiate the guarantee release process. This is only available if a guarantee has been registered for the authorisation.

As explained in the section "Roles and Responsibilities", the "AMM Administrate information" or "AMM Submit information" is needed to trigger any action. However, only the "AMM Submit Information" gives the right to actually submit the information during any process.

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Figure 43: Actions available on view authorisation page (Guarantee)