Federal Infrastructure Permitting Dashboard User's Guide

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Overview of the Federal Infrastructure Permitting Dashboard

The Federal Infrastructure Permitting Dashboard's portal for project data entry at Permitting.max.gov (for the purposes of this User's Guide, we will refer to this internal data-entry site as "the Dashboard") is designed to help facilitate project management coordination, schedule development, and collaboration between federal and non-federal project team members. It allows users to enter project information, identify key milestones during the permit and review process, and track target and actual dates for milestones associated with project schedules. It also enables users to publish project data to the public-facing Federal Infrastructure Permitting Dashboard ("the public Dashboard") at www.permits.performance.gov.

To complement the issuance of Office of Management and Budget (OMB)-Council on Environmental Quality (CEQ) guidance M-15-20, "Collection of Information Related to the Permitting and Review of Infrastructure Projects," the Dashboard has undergone significant technical and visual upgrades to improve the overall user experience. You can now:

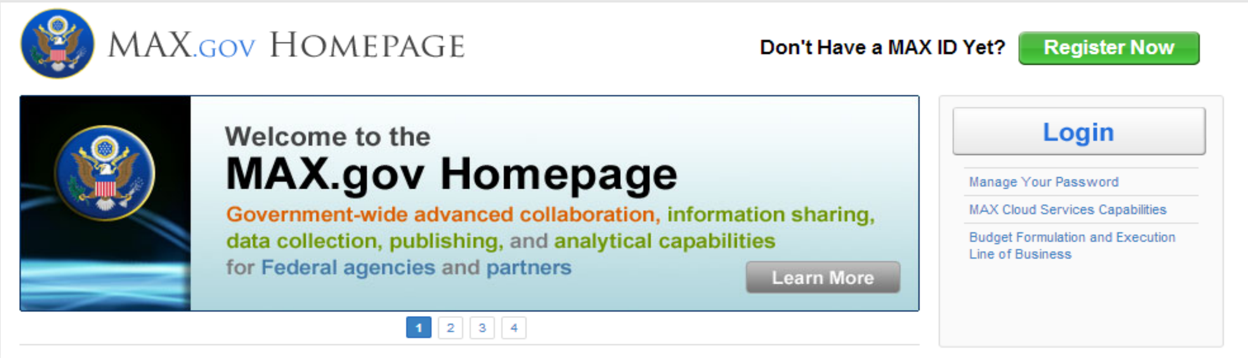
- Enter project-specific information and upload attachments in fewer steps
- Enter and track public and internal milestones in an easy-to-update table
- Preview updates prior to publishing data to the public Dashboard
- Remove (or "unpublish") data from the public Dashboard
- Search for projects by sector, status, coordinating agency, and state
- Create a personal list of favorite projects for quicker access
- View a self-updating stream of recent activity for projects
- Easily email project team members

This User's Guide aims to familiarize you with the Dashboard's basic functions. Any additional technical questions should be addressed to your agency Dashboard Administrator, the MAX Support team, or the Office of Management and Budget's Infrastructure Permitting team.

Accessing the Dashboard

To access the Dashboard, you'll first need to go to the MAX Federal Community at max.gov. The MAX Federal Community is limited to employees of the Executive Branch of the Federal Government and contractors supporting Executive Branch agencies. Self-registration for a MAX User ID is available to federal employees and contractors with a current Federal Government email address.

If you're a federal contractor with a non-government email address or a non-federal project team member seeking access to view and/or edit a project on MAX, you'll need a federal sponsor who is currently working on the same project on the Dashboard.



Federal Employees and Contractors

To obtain a MAX User ID and become a registered MAX user:

1. Visit the MAX Homepage: https://MAX.omb.gov/MAXportal/
2. Click "Register Now" at the upper right side of the window.
3. Enter the required data elements.
4. Contractors must check the box entitled "Contractor" on the registration form.
5. Click "Register" to validate your .gov or.mil email address.
6. Once approved, you will receive an automated email confirming the creation of your MAX Account and containing instructions for creating your password.

Prior to obtaining a MAX User ID, all MAX users are required to accept the User Agreement and Non-Disclosure Agreement. These documents are contained in the email sent at the time of submission of your registration application. To review the User Agreement and Non-Disclosure Agreement prior to submitting the registration form, see Appendix A and Appendix B.

Non-Federal Employees and Contractors

In order to access a project page on MAX, any user that does not have a valid federal government email address must be sponsored by a federal employee currently working on that MAX project.

Federal employees seeking to sponsor a non-federal employee must email MAX Support at maxsupport@omb.eop.gov to enroll in a brief training session regarding the sponsorship process and all legal regulations involved in sponsoring non-federal users. This mandatory training is offered on the phone and lasts approximately 15 minutes. Once the training is complete, the federal user will be able to sponsor non-federal employees from his or her account.

Federal employees that have completed sponsorship training can sponsor a non-federal employee by following these steps:

1. Visit the MAX Homepage: https://MAX.omb.gov/MAXportal/
2. Locate the MAX Account Administration section on the right navigation bar.
3. Click “Sponsor a Non-Federal User.” If this does not appear on the MAX Homepage, contact MAX Support at (202) 395-6860 or maxsupport@omb.eop.gov.
4. Complete the “Sponsor a Non-Federal User” form. The information provided must be about the sponsored user, not the sponsor. The completed form is sent to MAX Support.
5. The MAX Sponsorship Agreement will be below this form. Review the terms and conditions and click “I Accept.”
6. Click the “Sponsor User” button at the bottom of the screen to complete the sponsorship process.

MAX.gov HOMEPAGE

Sponsor a Non-Federal User into Your Enclave(s)

Please fill out the form below, review the sponsor agreement, and select the *Spon*
federal user with non-federal email address into your enclave(s). Your sponsored us
link to accept the MAX user agreement with further instructions on how to activate
* Indicates required fields

Contractor?

*First Name: MI:

*Last Name:

*Email Address:

*Confirm Email:

User Community: Non-Federal

Comments to Sponsored User:

Reason for Sponsoring:

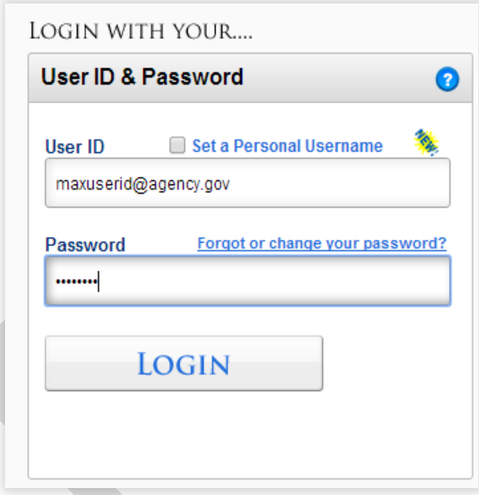
To review the MAX Sponsorship Agreement prior to sponsoring a nonfederal user, see Appendix C.

Once this process is complete, the sponsored user will receive an email from MAX. This email will inform the user that a federal employee is attempting to sponsor them into MAX. This email will also contain a link to the User Agreement and Non-Disclosure Agreement. All sponsored users must follow this link to review and agree to the terms.

Sponsored users that agree to the terms of the User Agreement and Non-Disclosure Agreement will receive a second email from MAX confirming the creation of the MAX account along with instructions for creating a password.

Registered and Sponsored Users

Accessing the Federal Infrastructure Permitting Dashboard at https://permitting.max.gov requires a valid MAX User ID and password.



To open the Federal Infrastructure Permitting Dashboard using a valid MAX User ID and password:

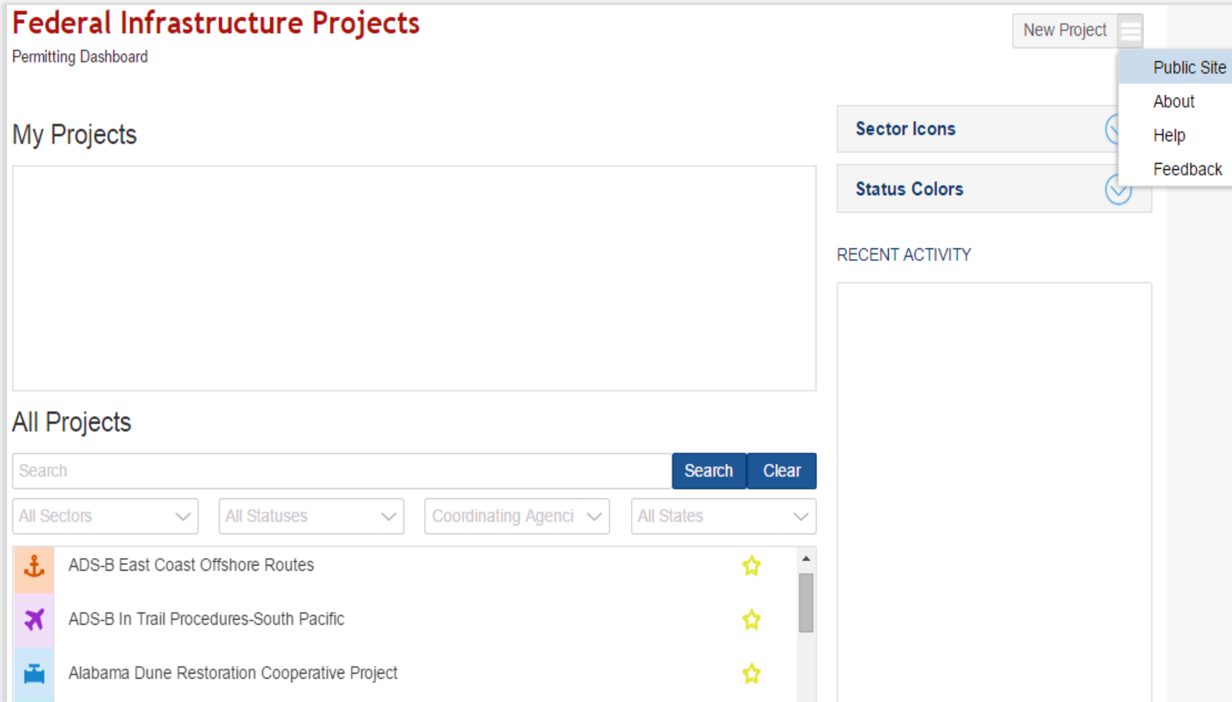
1. Visit Permitting.max.gov.
2. The MAX Community Login page will open.
3. Enter a valid MAX User ID and password.
4. Click “Login.”
5. The Federal Infrastructure Permitting Dashboard home page will open.

Navigating the Federal Infrastructure Permitting Dashboard Home Page

The Dashboard includes various features to automate project creation and schedule tracking, and allows project team members to easily locate, review, and edit project pages.

The home page includes the following features:

- An “All Projects” section that lists all projects that you’re permitted to view
- A “My Projects” section that lists user-selected ‘favorite’ projects
- A “Recent Activity” stream that lists recent edits and/or additions to favorite projects
- Four filtering options to search for projects
- An expandable navigation pane that redirects a user to the Project Preview site, Public Dashboard, Help page, and Feedback form



Viewing and Editing Projects in the "All Projects" Section

Depending upon your registration status, the "All Projects" section will display different lists of projects. The Dashboard aims to ensure accuracy and accountability by limiting the number of people who can edit project-specific information.

Registered federal employees and federal contractors can view the complete list of all projects included on the Dashboard in their "All Projects" section, but may only edit those projects for which they have explicit involvement or access.

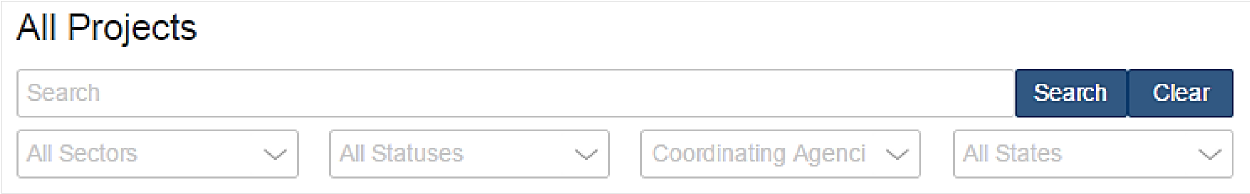
In contrast, sponsored non-federal employees and contractors will see only the list of projects for which they have explicit involvement or access, and will therefore be able to view and edit any project appearing in their "All Projects" section.

Searching for Projects and Populating the "My Projects" List

As depicted above, your "My Projects" list will initially appear empty, but you can easily populate it with a list of favorite or frequently-viewed projects and can add any project listed within the "All Projects" section.

To conduct an advanced search for a project within the "All Projects" section:

1. Use the four drop-down menus to filter the list of projects by sector, status, agency, or state. You may select multiple sectors, statuses, agencies, or states by clicking on as many options as needed in each drop-down menu.
2. A list of search results matching the selected filters will automatically appear below.
3. You may also enter a keyword into the search bar and click "Search."



To clear all filters and begin a new search, click “Clear.” The full list of accessible projects will reappear in the “All Projects” section.

Once the project has been located, add it to your list of favorites by clicking the star icon located to the right of the project title. The project will automatically appear in the “My Projects” list while also remaining in the “All Projects” section.

To remove a project from your list of favorites, click the star icon located to the right of the project title in the “My Projects” list.

Recent Activity Stream

The “Recent Activity Stream” is located on the right side of the Dashboard home page. The stream displays real-time updates for all projects in the “My Projects” list to which a user has access. The stream will display the recently updated information and the date and time of the update, and identify the project team member who completed the update.

To contact a project team member regarding a recent update in the stream, click on the name of the author noted in the update. An email will open with the author’s email address in the recipient field.

To view the recent activity for only one project, rather than all projects, click the project name in either the “My Projects” list or the “All Projects” section. This will open the project page containing project-specific information and recent updates.

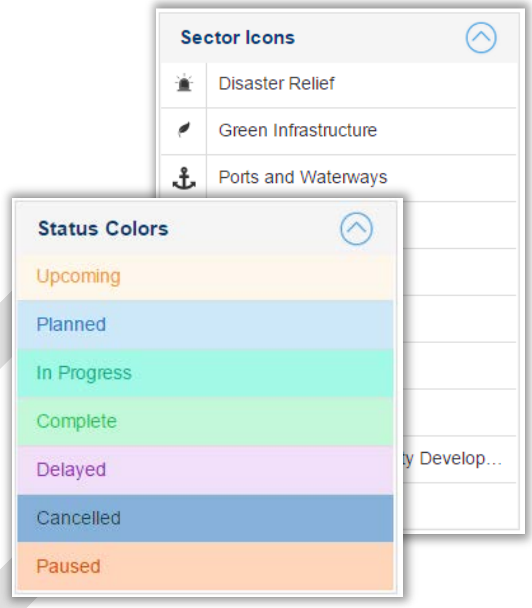
Project Sector and Status

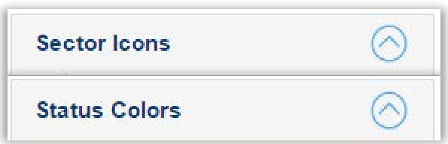
Each project is assigned a specific sector and status. The sector and status display with color-coded icons. The icon will appear to the left of the project title in both the “My Projects” list and the “All Projects” section. Each icon contains an image and a background color. For example, a completed aviation project will have an icon containing an airplane (sector) with a green background (status).

The icon and color are automatically generated based on the information entered into the Dashboard. The icon and background color automatically update in response to edits to the project sector and status.

To view a full list of sector icons and status colors:

1. Locate the “Sector Icons” and “Status Colors” boxes on the top right side of the home page.
2. Click the arrow within each box to open a full list.
3. Click the arrow again to collapse the list.



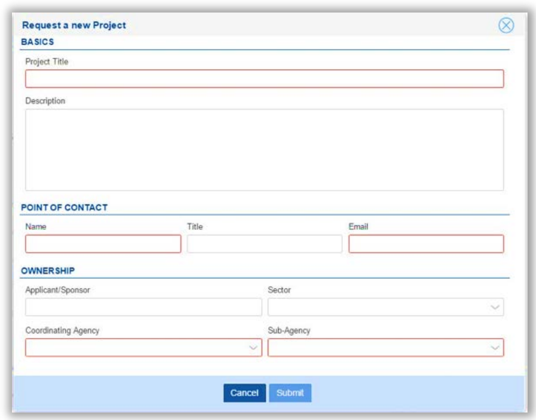


Adding a New Project to the Dashboard

You must follow the timeline and criteria outlined in Section 2.2 of OMB-CEQ Guidance M-15-20 to add a project to the Dashboard.

Follow the steps below to add a project:

1. On the home page, click “New Project” in the upper right corner to open the project request form. The project title, coordinating agency, sub-agency, and point of contact are highlighted in red indicating that this information is required to submit a new project request.
2. Once the form is complete, click “Submit.”
3. You’ll be sent an email within 24 hours notifying you that a project page has been created. You’ll see the project listed in the “All Projects” section the next time you log in.



Navigating the Project Page

To input or review information regarding a particular project, select the project of interest on the home page, the project page will then open.

The project page contains four tabs:

- Project Information
- Project Schedule
- Project Team
- Files

Project Information Tab

As its name suggests, the Project Information tab captures key project information, such as project status, estimated cost, ownership, location, etc. Information submitted on the project request form will automatically appear on this tab. However, you will need to enter the remaining information and regularly update it to reflect any changes.

To enter data into the form:

1. Place your cursor within a text box.
2. Enter the appropriate data into the text box.
3. Repeat steps 1 – 2 for each required field outlined in red. Fill in the non-required fields if you know the information.
4. Click “Save.”
5. To clear all fields and restart the data entry process, click “Undo Changes.”

Note that, once entered, the project’s target and actual start and end dates will display on the Project Information tab; however, to enter and edit the dates, you will need to use the Project Schedule tab. The earliest target/actual dates entered under the Project Schedule tab will automatically display on the Project Information tab as the project’s target/actual *start dates*. Similarly, the latest target/actual dates entered under the Project Schedule tab will appear as the project’s target/actual *end dates*.

Project Schedule Tab

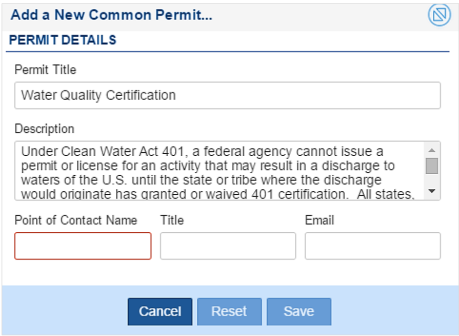
The Project Schedule tab provides a way for project teams to track every permit and review needed to complete a project. On this tab, teams can enter anticipated project milestones, select *target dates* for milestone completion, and document the *actual dates* on which milestones occur.

Adding Permits and Reviews to the Project Schedule

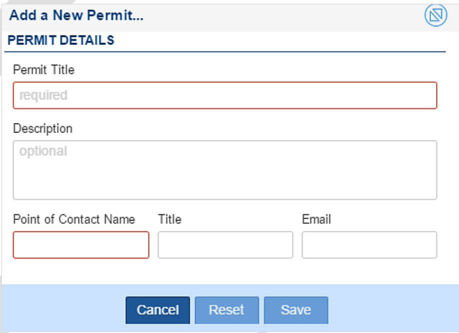
To add a permit or review to the project schedule:

1. Click “Add Permit” to open a drop-down list of permit types.
2. Select *Common Permits*, *NEPA Class of Action*, or *Other Permits and Activities*.
3. If selecting *Common Permits* or *NEPA Class of Action*, a window will appear containing a list of permits applicable to the project’s sector.
4. Select a permit or review. Click “OK.”

5. This will open the Permit Details form. You won't be able to add a permit until a point of contact is entered. Click "Save."

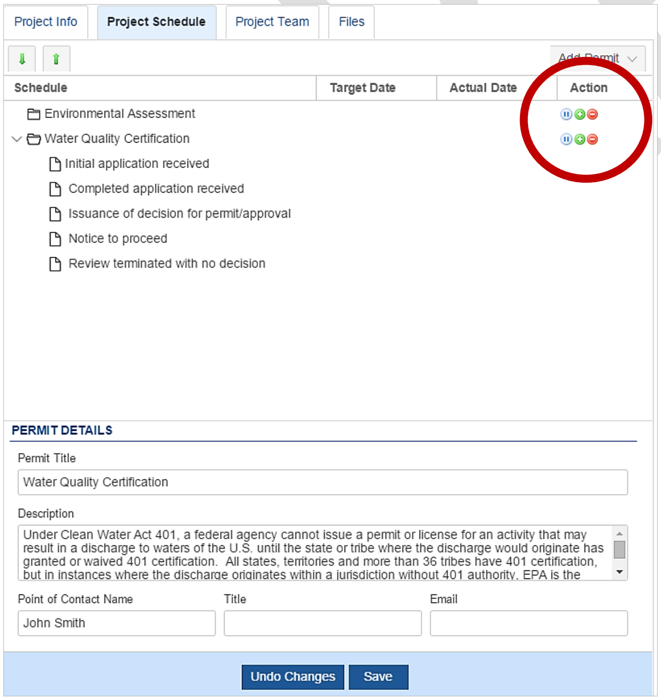


6. A user should select *Other Permits and Activities* to enter any permit or review activity not found in the other two menu choices (such as state, local, or tribal permits). A blank Permit Details form will open. Enter the permit title, description, and point of contact. Click "Save."



Adding and Updating Milestones on the Project Schedule

All *Common Permits* and *NEPA Classes of Action* will appear on the schedule with a pre-populated set of milestones. For any other user-generated permit or review, you'll need to manually add appropriate milestones.



To add a milestone to the project schedule:

1. Locate the associated permit or review on the schedule.
2. Click the "Add" icon in the Action column on the schedule.

To enter and update milestone dates on the schedule:

1. Click the permit or review on the schedule to reveal a list of milestones below.
2. Select a milestone to open the Milestone Details form.
3. Enter or update the target date and actual date.
4. Click "Save."

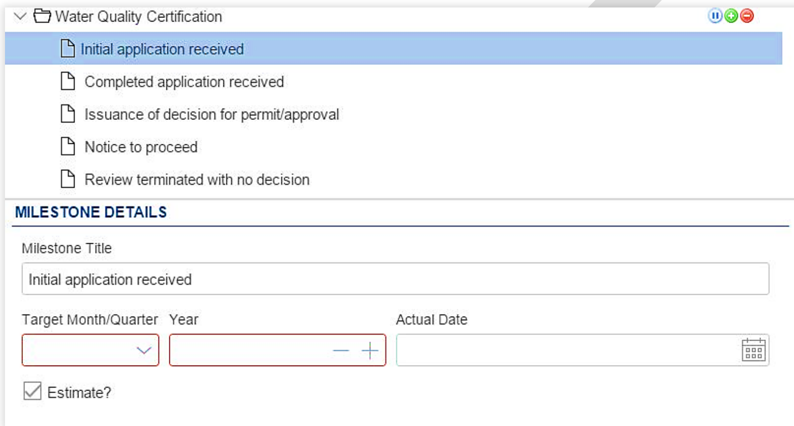
You may enter target dates for milestones in three different formats depending on when the milestone is likely to occur. Enter target dates as:

1. Predicted Dates (MM/DD/YYYY) for actions that will occur within the first six months of the schedule.

2. Estimated Dates (MM/YYYY) for actions planned between six months and 18 months from the current date.

3. Quarterly Targets (Q/YYYY) for actions planned beyond 18 months.

Note: If entering Estimated Dates or Quarterly Targets, check the “Estimate?” box.

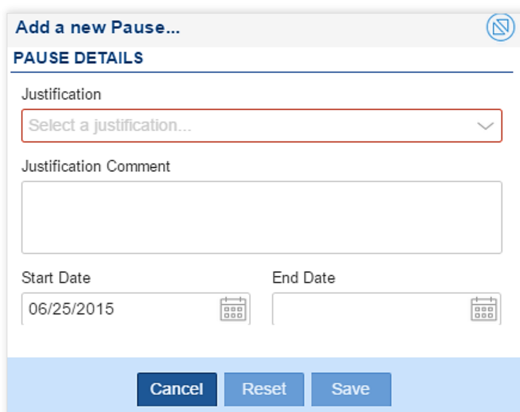


Pausing and Resuming Permits and Reviews on the Project Schedule

In some cases, a Federal agency must wait a significant period to complete a necessary review or render a permit decision due to a factor wholly outside its control. This time elapsed due to external factors is referred to as a “pause” in the Federal review.

To “pause” a permit or review:

1. Locate the permit or review on the schedule.
2. Click the “Pause” icon in the Action column to open the Pause Details form.
3. Select a justification for the pause from the dropdown menu.
4. Enter an explanation for the pause in the Justification comment box.
5. Click “Save.”
6. The pause will appear on the schedule as “Pause – [Selected Justification] – Actual Start Date.”



The form defaults to the current date as the start of the pause. Click the calendar icon to select a new start date for the pause.

To resume a permit or review:

1. Click the “Pause” icon in the action column to open the Pause Details form.

2. Click the calendar icon to select an end date for the pause.
3. Click "Save."
4. This will appear on the schedule as "Resume – Actual End Date."

Deleting Permits, Reviews and Milestones from the Project Schedule

To delete a permit, review, or milestone:

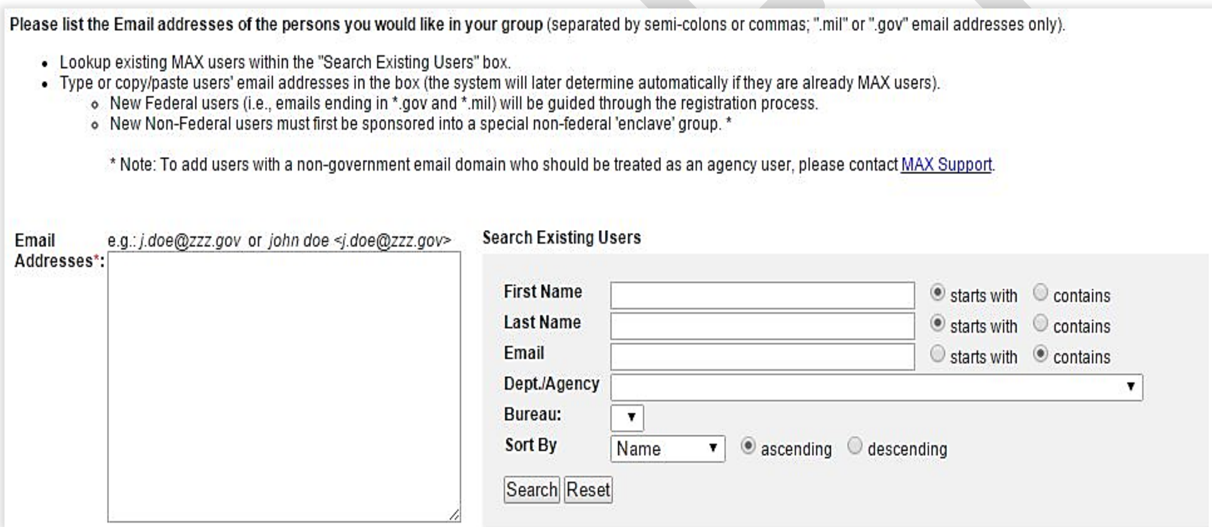
1. Locate the permit, review, or milestone on the schedule.
2. Click the "Delete" icon in the Action column on the schedule.

Project Team Tab

The Project Team tab shows all registered or sponsored MAX users affiliated with a project. This tab will display each project team member's name, agency, and email address.

After the project is initially created, the project requestor will be the <u>sole</u> team member listed on the tab. This user has administrative rights that will allow him/her to add additional users to the project team and to decide which other team members should have administrative rights.

Project administrators can add project team members through the following steps:


Please list the Email addresses of the persons you would like in your group (separated by semi-colons or commas; ".mil" or ".gov" email addresses only).

- Lookup existing MAX users within the "Search Existing Users" box.
- Type or copy/paste users' email addresses in the box (the system will later determine automatically if they are already MAX users).
  - New Federal users (i.e., emails ending in *.gov and *.mil) will be guided through the registration process.
  - New Non-Federal users must first be sponsored into a special non-federal 'enclave' group. *

* Note: To add users with a non-government email domain who should be treated as an agency user, please contact MAX Support.

Email Addresses*: e.g.: *j.doe@zzz.gov* or *john doe <j.doe@zzz.gov>*

Search Existing Users

First Name ◉ starts with ○ contains
Last Name ◉ starts with ○ contains
Email ○ starts with ◉ contains
Dept./Agency
Bureau:
Sort By Name ◉ ascending ○ descending

Search Reset

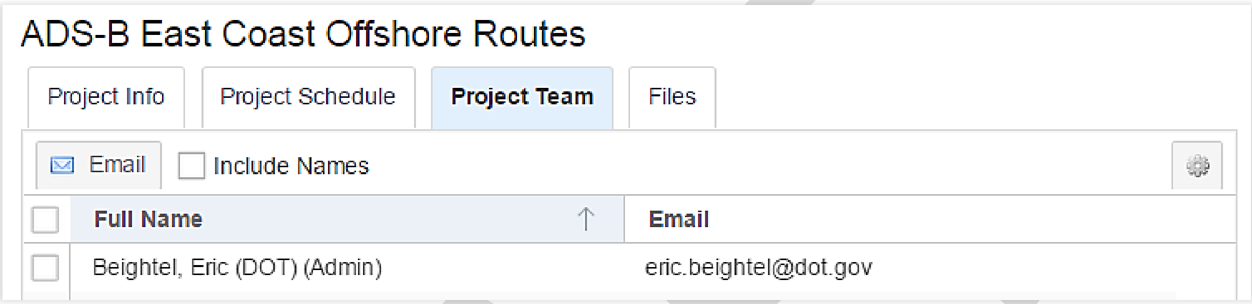
1. Log in to MAX.gov.
2. In the box "My Collaboration Groups," locate your project's group.
3. In the "Select Action" drop-down menu, select "Manage Group."
4. Click "Add Users."
5. You may search for users or simply enter their email addresses in the box provided. Once all user email addresses are entered, click "Next."
6. If any of the selected users are to be assigned administrative rights, click the "Admin?" box next to their names.
7. Click "Proceed with Adding Users" to complete the process.

The contact information presented on the Dashboard is retrieved from each team member's MAX Profile. MAX Profiles are updated using the following steps:

1. Log in to MAX.gov.

2. In the upper right corner, hover over the Welcome bar to reveal a drop down of account configuration options.
3. Select "My Profile" to open your profile.
4. Select "Update Your Profile" to add or update your name, phone number, and email address.
5. Click "Save Profile Changes."
6. Refresh the Federal Infrastructure Permitting Dashboard page to review your recently updated contact information on the Project Team tab.

All project team members can use the Project Team tab to discuss the project. You'll be able to contact project team members individually or collectively.



To email a single project team member:

1. Locate the team member you wish to contact in the "Full Name" column.
2. Select the member by checking the box to the right of his or her name.
3. Click "Email."
4. A draft email will open on your personal desktop with the team member's email address in the recipient field. (Note: In order for the draft email to open, your email client must be open as well.)

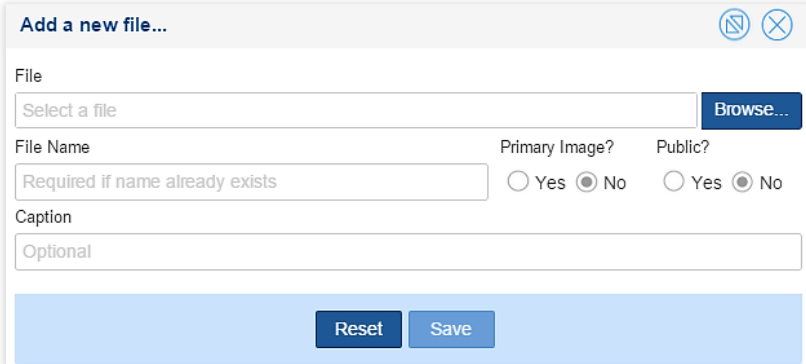
To generate an email to all project team members:

1. Select all team members by clicking within the checkbox to the right of "Full Name."
2. Click "Email."
3. A draft email will open on your personal desktop with each team member's email address in the recipient field. (Note: In order for the draft email to open, your email client must be open as well.)

Files Tab

You can upload supporting documents or images to the Dashboard for internal or public review.

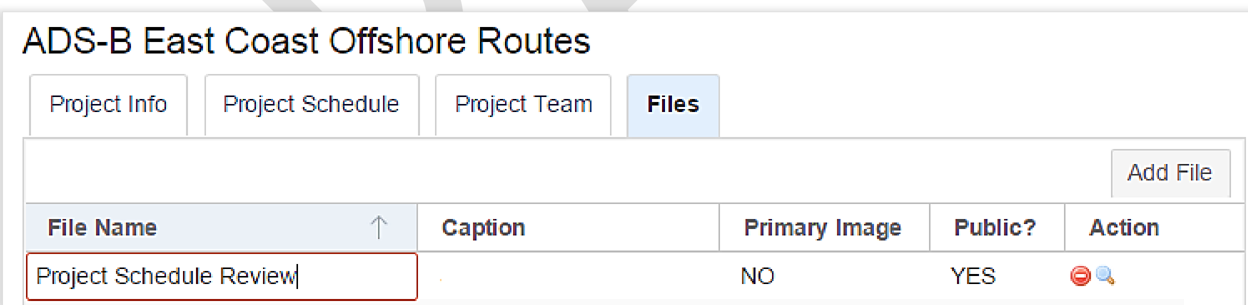
You can add files to the Dashboard following these steps:



1. Click the "Add File" button in the upper right corner of the tab.
2. Click "Browse" to select a file from your personal computer.
3. Enter a name for your file. (Note: You must give each file a unique name to upload to the Dashboard.)
4. Select "Yes" or "No" for Primary Image. The primary image will be the image displayed on the project's public Dashboard page.
5. Select "Yes" or "No" for Public. A public document will be available for review on the public dashboard.

You can change the file name, caption, and status as public or as the primary image at any time after a file has been uploaded. To change the file status:

1. Click within the Primary Image column to open the Yes/No drop-down menu. Select the appropriate status. Only one primary image can be selected. Selecting a new primary image will cause the previous primary image to automatically lose its primary status.
2. Click within the Public column to open the Yes/No drop-down menu. Select the appropriate status. Multiple files can be granted public or internal status.
3. Click within the file name or caption column to enter a new name or caption.



Use the icons in the action column to view or delete files from the Dashboard.

Previewing and Publishing Project Data

After updating the Project Information and Project Schedule tabs, data will automatically become available on the preview site. The preview site feature provides the opportunity to preview data prior to its publication. Any project team member may preview the data in an effort to ensure accuracy in his or her submission.

To preview how the project page will appear on the public-facing Dashboard site:

1. Open the project page.
2. On the Project Information tab, select "Save" to ensure that all data is captured.

3. In the top right corner of the Dashboard, expand the navigation pane.
4. Select “Preview Site” to preview the data’s appearance on the public Dashboard.
5. If revisions are required, return to the project page to edit the data.

Following a project administrator’s review of the data on the project page, the project administrator may publish the data to the public Dashboard.

To publish project data to the public Dashboard:

1. Open the project page.
2. On the Project Information or Project Schedule tab, select “Publish” to publish the data on Permits.performance.gov. If the “Publish” button is disabled, click “Save” to enable publishing.
3. The published data will become visible on Permits.performance.gov within five minutes.

To unpublish project data from the public Dashboard:

1. Open the project page.
2. On the Project Information or Project Schedule tab, select “Unpublish” to remove the data from Permits.performance.gov. If the “Unpublish” button is disabled, ensure that the project has been saved and click “Publish” to enable unpublishing.
3. The unpublished data will remain visible on Permitting.max.gov.

User Assistance

Help

To review a copy of the user’s guide, view training webinars, or review dates for upcoming webinars:

1. In the top right corner of the Dashboard, open the navigation pane.
2. Select “Help.”

Feedback

If you’d like to submit feedback on how to improve this site, ask questions about the site, or report technical issues:

1. In the top right corner of the Dashboard, expand the navigation pane.
2. Select “Feedback” to open the submission form.
3. Enter your name, position, email address, and comment.
4. Click “Submit.”
5. Submissions will be sent to the Office of Management and Budget for review and action.

Appendix A: MAX User Agreement

All MAX users must agree to the following terms and conditions prior to obtaining a MAX User ID for access into the MAX Federal Community:

This agreement is issued under the authority of the Federal Information Security Management Act of 2002 (Pub. L. No. 107-347, Title III).

MAX is a U.S. Government computer system used to conduct official government business. Business conducted on MAX shall be conducted in a manner above reproach and in accordance with the highest ethical standards to ensure the public's confidence in the integrity of the Government, its employees, and systems.

1. I understand that the MAX systems are U.S. Government systems for the purposes of conducting official Government business, and that the MAX User ID and any other information related to access and use of the MAX systems are considered sensitive and critical.
2. I will NOT enter classified information into the MAX systems.
3. I will protect my personal password from disclosure.
4. I will log off or otherwise restrict access to any MAX System session when I am not personally attending to it.
5. Upon completion of my government-related duties that involve using the MAX systems, I will contact the MAX Data Management Team to ensure my User ID is properly disabled.
6. If I suspect someone else has tried to learn my password or fraudulently gain access to the MAX systems, I will immediately report the incident to a MAX representative.

I acknowledge that with my MAX ID, I may have access to government information of a sensitive or critical nature that is the sole property of the U.S. Government and I hereby agree to protect that information in the strictest confidence and to use it only to support Government purposes.

Appendix B: MAX Non-Disclosure Agreement

I acknowledge that with my MAX ID I will have to access to government information which may be of a technical and/or sensitive nature, and which may be the sole property of the U.S. Government. I hereby agree to protect that information in the strictest confidence, and to use it only to support the Government tasks which I have been assigned.

I further agree that I am specifically prohibited from publishing, reproducing, or otherwise divulging any such information completely or in part, in any manner or form. I am prohibited from authorizing or permitting others to do so, and will take such reasonable measures as are necessary to restrict access to the information while in my possession.

Using such information for a purpose or to an extent unauthorized herein, may subject me to criminal sanctions imposed by 18 U.S.C. 641. This section provides, in pertinent part, "Whoever... knowingly converts to his use or to the use of another, or without authority, sells, conveys, or disposes of any record... of the United States... or whoever receives... the same with intent to convert it to his use or gain, knowing it to have been... converted, shall be fined [not more than $10,000] or imprisoned not more than 10 years, or both."

Appendix C: MAX Sponsorship Agreement

At the bottom of the "Sponsor a Non-Federal User" form, you will be asked to acknowledge and agree to the terms of the Sponsorship Agreement.

A sponsor must agree to the following:

1. I will responsibly sponsor this user for a MAX ID for performing Government business.
2. I have direct knowledge of the user or I have verified their identity by reviewing the user's identification credentials.
3. I will immediately notify the MAX Data Management Team (MAXSupport@omb.eop.gov, 202-395-6860) when this user access is no longer appropriate for the conduct of Government business.

By agreeing to these terms, you are acknowledging the most important role a sponsor will hold: As a sponsor, you must ensure the validity of each non-federal partner. You will also be responsible for any content that your sponsored users post on the MAX Federal Community.