MTA Construction & Development

EXTERNAL PARTNER PROGRAM

EPIC

USER MANUAL

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1. Introduction

1.1 About the MTA External Partner Program

The MTA External Partner Program (EPP) supports both public and private initiatives to develop new development projects above and around train stations. These investments are critical to the region's economy and quality of life. We also review and approve all public and private construction activities that occur near our infrastructure.

EPP provides a single system for applicants' submission and administrative needs. The EPIC Platform is user-friendly and centralizes project information, as-built requests, applications, insurance, safety forms, and payments.

1.2 Who needs to apply (Program areas and thresholds)

Any public- or private-sector entity engaging in construction within 200 feet of MTA properties, structures, or assets must file plans with the MTA EPP. This ensures our unique infrastructure is protected.

The MTA EPP guides these entities through the process of submitting construction plans to the MTA and coordinating their implementation.

2. Getting Started

2.1 Creating a new account

To create a new account, go to the [EPIC platform]() page and click the [Sign In]() link (Figure 2.1)

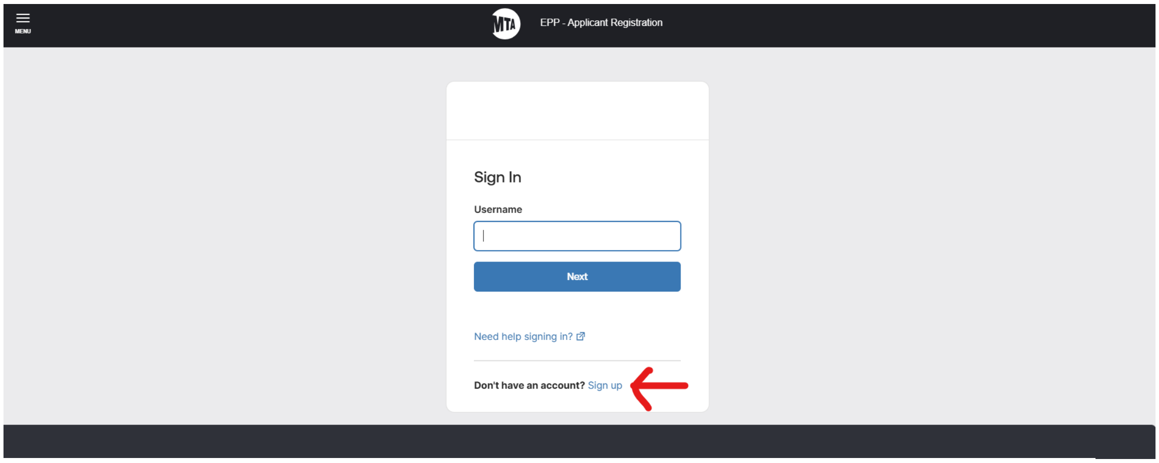


Figure 2.1 Create a new account

- After completing sign-up, log in and fill out your Profile form by entering your first and last name, then click “save” (Figure 2.1.a).

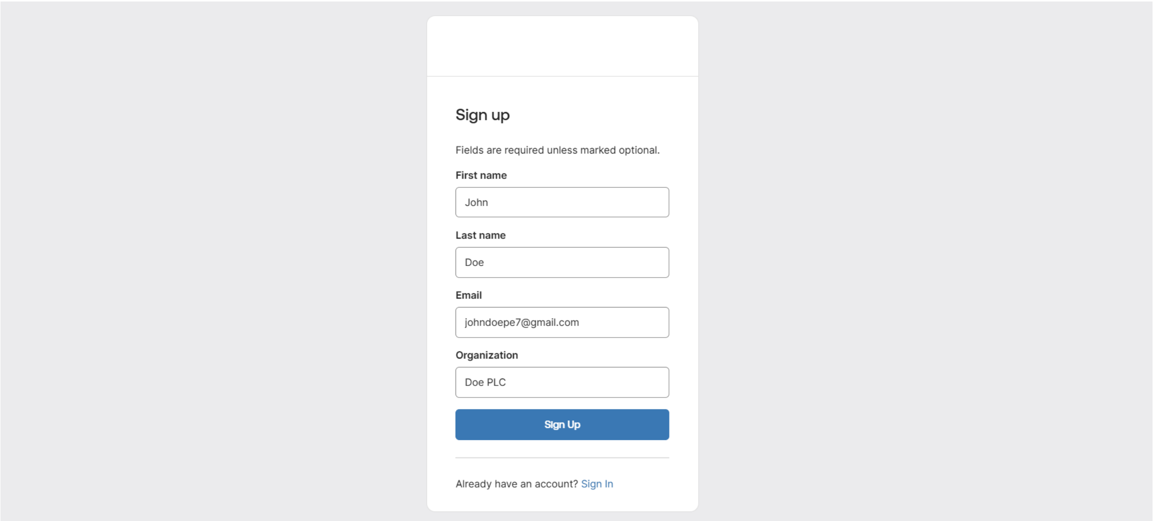


Figure 2.1a Sign up

- Set up a password for your account. *(Figure 2.1.b)*

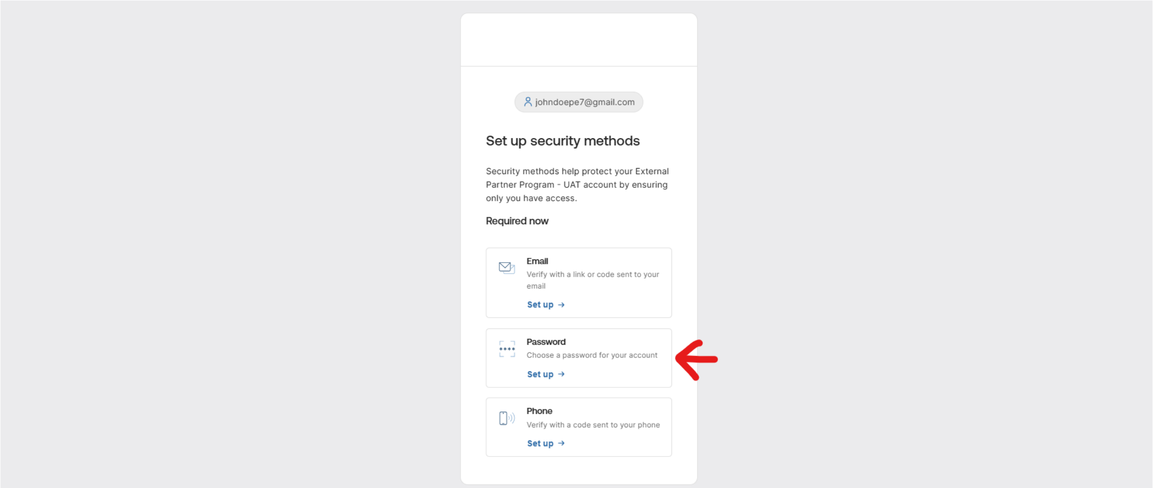


Figure 2.1b Set up a password

- Once this step is completed, you will be able to log in to your account and begin filling out the **Profile form**. User must enter their first and last name and click “save”. *(Figure 2.1.c).* Please note: After saving, changes to account details can only be made by EPP administrators.

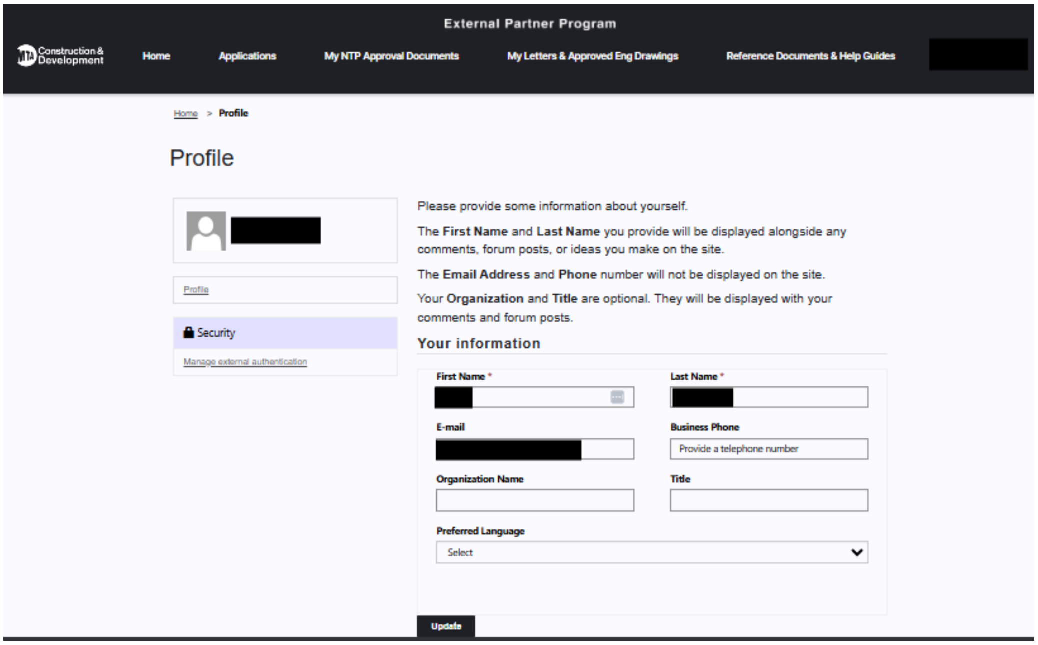


Figure 2.1c Fill out application form

Note: After you save your profile, certain account details may only be updated by **EPP Administrators**. Please verify your information carefully before saving.

2.2 Multi-Factor Authentication (MFA) Setup

Applicants are required to enable and use multi-factor authentication (MFA). *(Figure 2.2)*

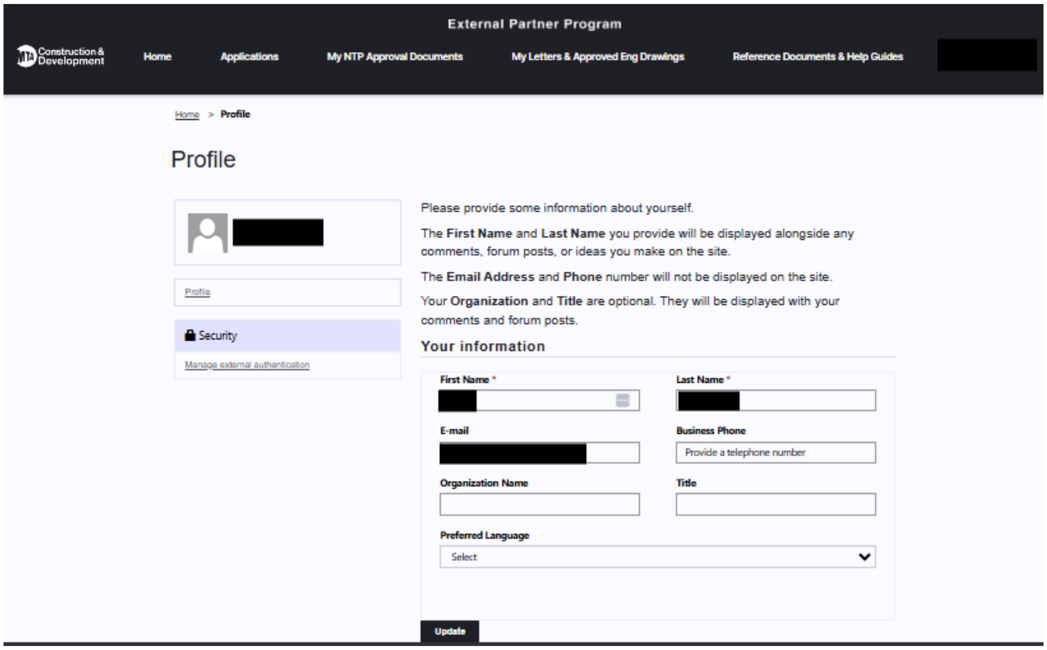


Figure 2.2 Set up security methods

- Set up security methods following the instructions on the screen. *(Figure 2.2)*

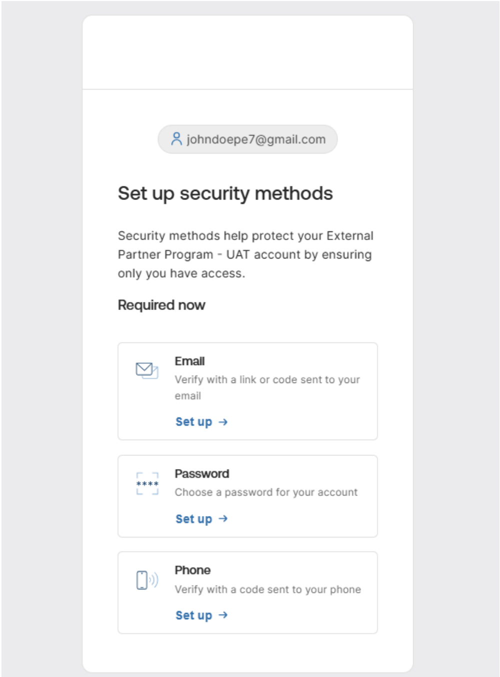


Figure 2.2 Set up security methods

- Verify your email following the instructions provided. *(Figure 2.2.a)*

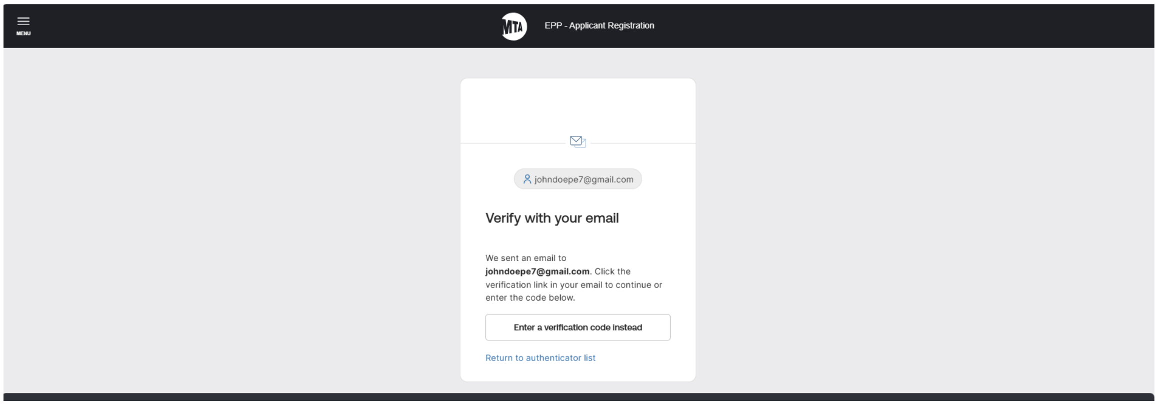


Figure 2.2.a Verify with your email.

- If you choose to verify with your email, you will receive a **Welcome Email** from EPP in your inbox.
- Once your password and email are set up, the platform will prompt you to configure additional security/verification methods using your phone. You will receive either a text message or a call to verify your identity. This step is a precaution in case you lose access to your account or if someone attempts unauthorized access. *(Figure 2.2.b)*

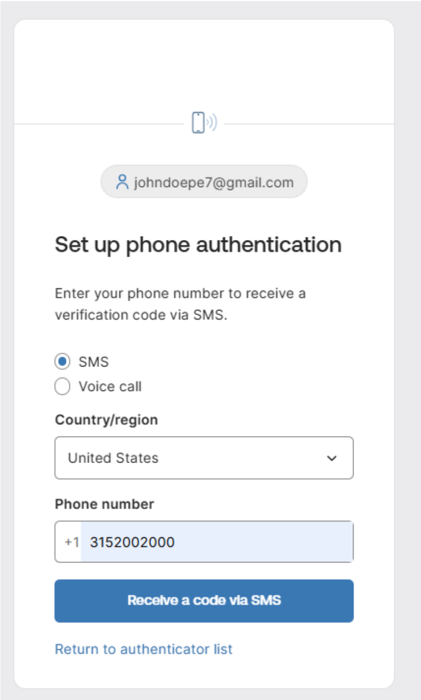


Figure 2.2b Set up phone authentication

- Complete the phone authentication form. Depending on your chosen method, you will receive either a text message or a phone call to complete the verification process.
- **Optional:** after completing the MFA set up, configure OKTA verify for additional security.

2.3 To log in to your account

1. Navigate to the [EPIC platform] website
2. Sign in with your username and password or with an external account. *(Figure 2.3.2)*

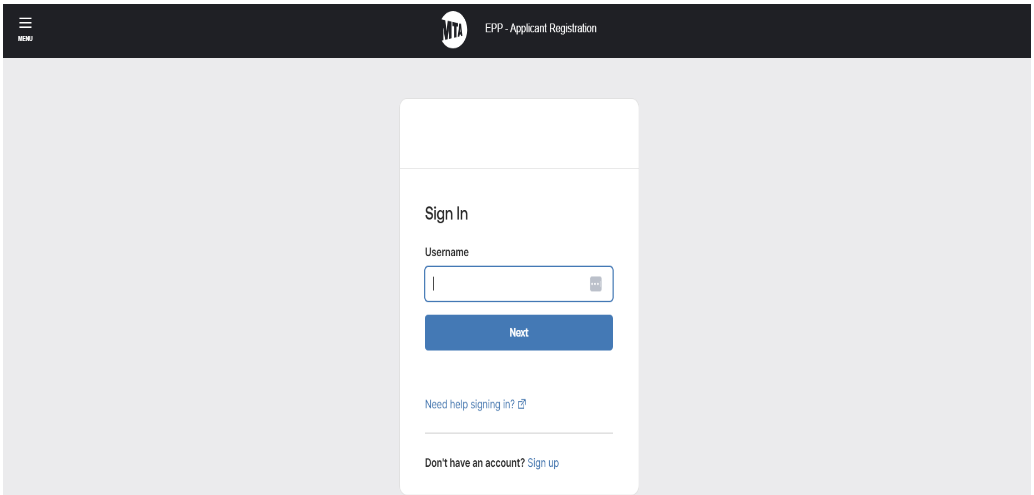


Figure 2.3.2 Log In

3. After you sign in, click the drop-down arrow next to your name to view your full profile with all the necessary information. You can also adjust as needed. *(Figure 2.3.3)*

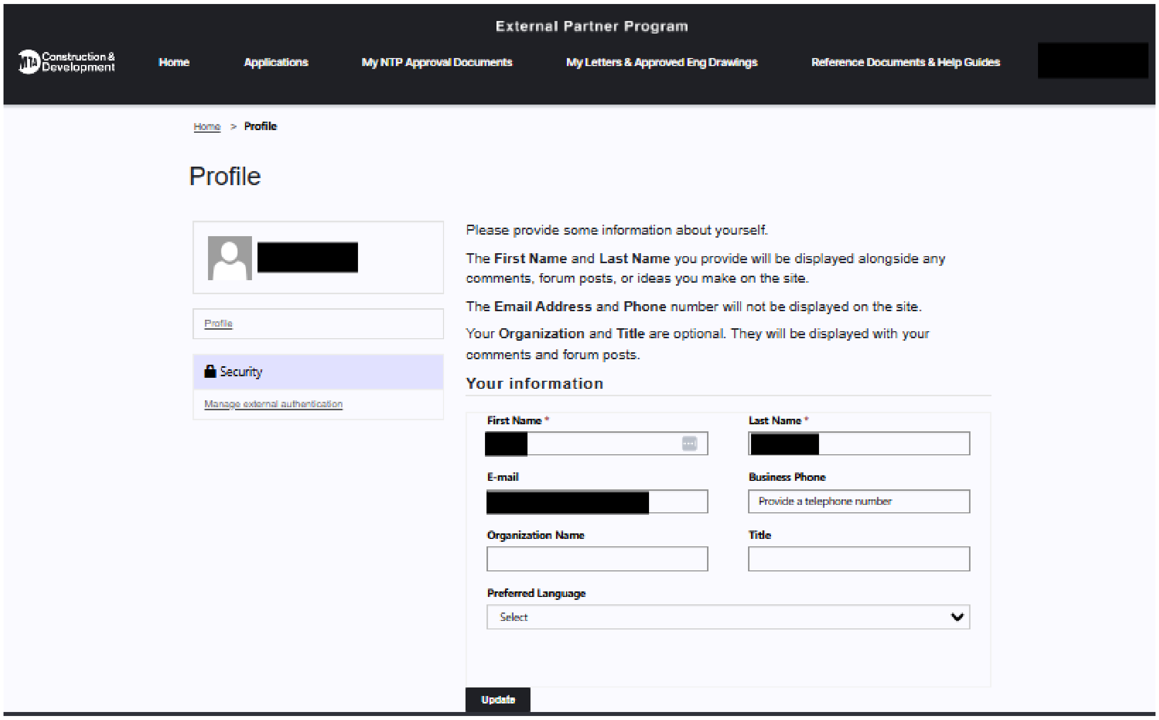


Figure 2.3.3 Profile page

2.4 Resetting your password / Recovering your account

To reset your password, verify your account using one of the available security methods (either by email or text message). (Figure 2.4.a)

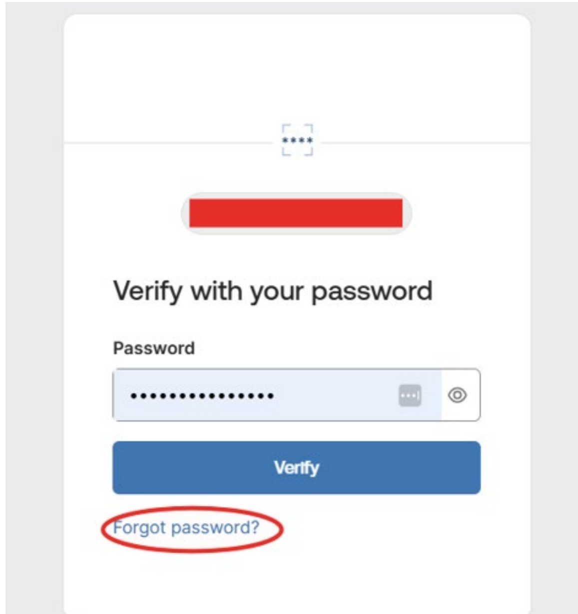


Figure 2.4 Forgot password

To reset your account password, you will need to verify your account using one of the security methods (either by receiving an email or a text message on your phone). *(Figure 2.4.a)*

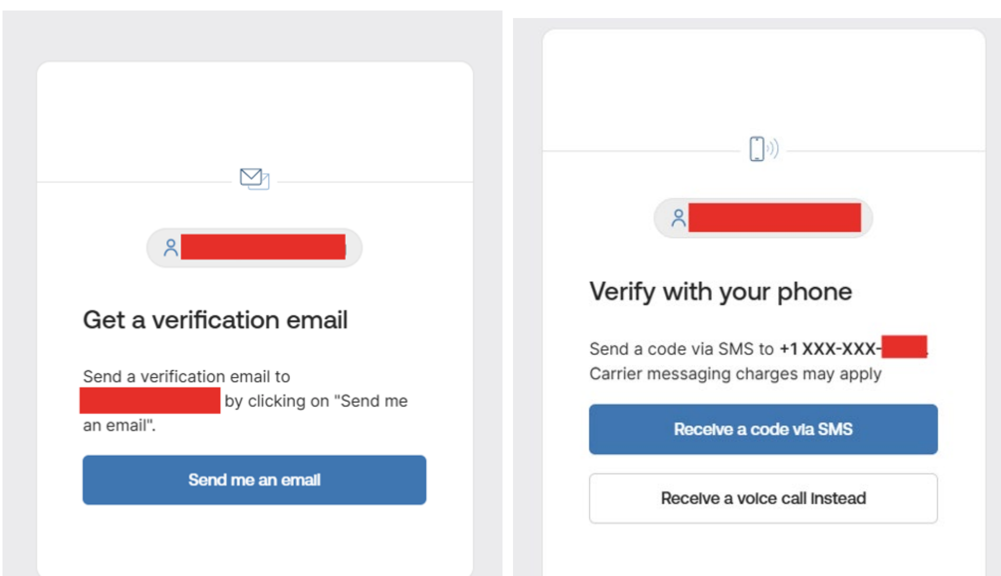


Figure 2.4.a Verification methods

3. System Requirements

3.1 Supported Browsers and Devices

To ensure compatibility, please use the latest versions of Chrome, Firefox, Microsoft Edge, or Safari when accessing the EPIC platform. The platform is also compatible with iPads and iPhones.

3.2 Recommended File Formats & Sizes

- The file formats supported are: .PDF, .doc, .docx, .jpeg, .png, .xlsx.
- Upload size limits: 50MB.
- Only PDF documents are supported for annotations and engineering reviews.

3.3 Application nomenclature

The **Naming Conventions** used for EPIC are as follows (this does not apply to Drafts):

Archive Information Requests:

- Adjacency - ASB-####.Block.Lot.BoroughAbbreviation.StreetAddress
- Public Ag ASB-####.Block.Lot.BoroughAbbreviation.AgencyAbbreviation
    - **(Block & lot is optional for public agency requests so it may not apply to all application requests)**

Applications

- Adjacency - EPPA-####.Block.Lot.BoroughAbbreviation
- Public Agency - EPPA-BoroughAbbreviation.ContractNumber
    - ALL ADDENDA WILL HAVE A TRAILING ".A" AT THE END.
        - i.e EPPA-####.Block.Lot.BoroughAbbreviation.A
- Note: Public Agency Contract Numbers must contain **alphanumeric characters only** (letters and
- numbers). The system does **not** accept spaces or special characters.

Insurance

- INS-####

Safety

- SAF-####.Borough.StreetAddress

4. Submitting Requests

4.1.a Submitting & tracking archive requests

To submit an Archive Information Request form:

1. Select the Applications tab at the top of the page.
2. Select 'Submit Archive Information Request.'
   (Figure 4.1.a)

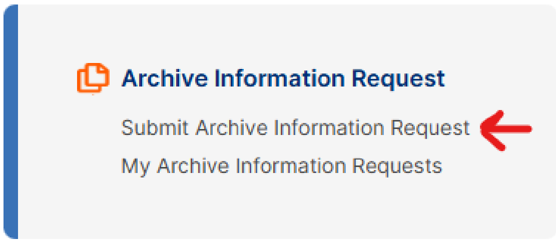


Figure 4.1.a Submit Archive Information Request

3. Complete all required fields marked with a red asterisk (*) on the "**Archive Information Request form"**.
   a. Sections include, but are not limited to:
      i. Applicant Information *(Figure 4.1.3.a)*
      ii. Applicant Company Info
      iii. NYS Licensed Professional / Designer of Record
      iv. Project Information. *(Figure 4.1.3.b)*
   b. **Note:** All project addresses are validated by USPS. The MTA does not accept applications for project addresses that cannot be verified by USPS.

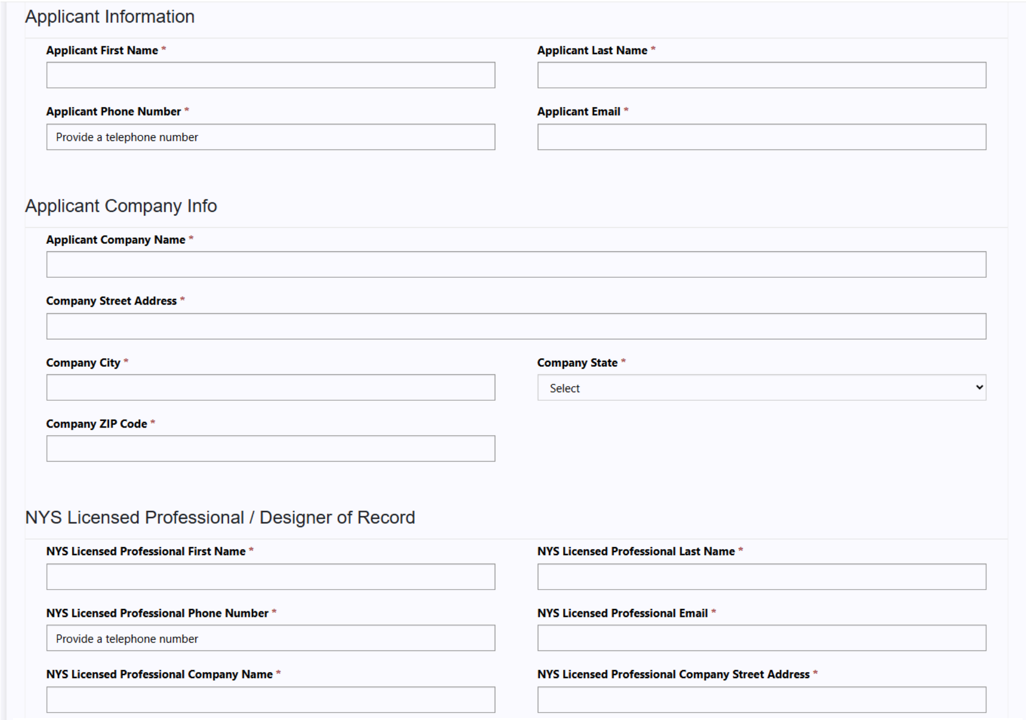


Figure 4.1.3.a Section for Applicant Information, Applicant Company Info, NYS Licensed Professional / Designer of Record

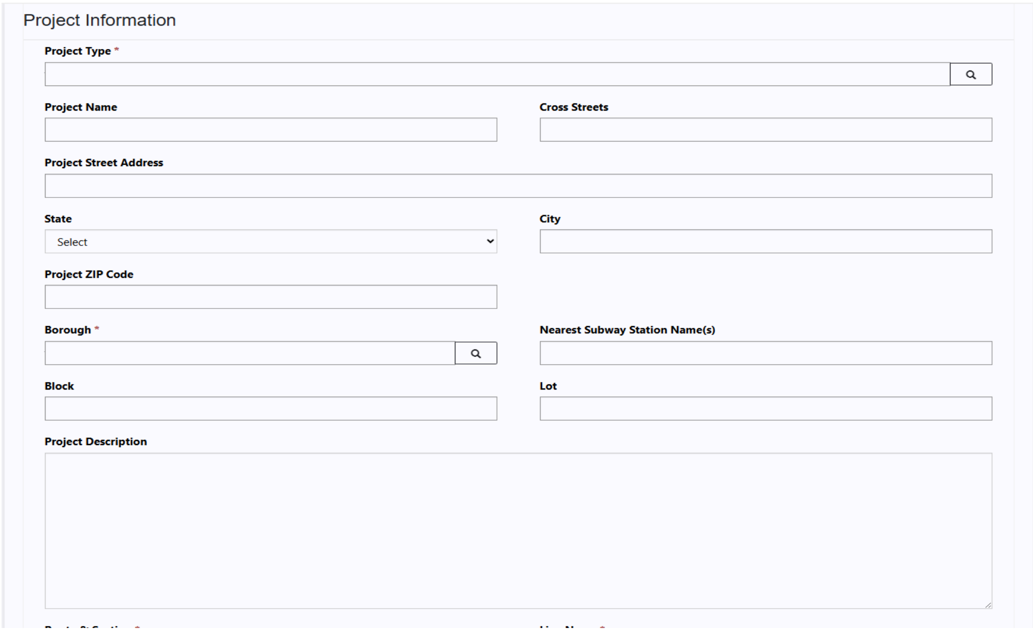


Figure 4.1.3.b Section for Project Information

4. Read the **Acknowledgment**, check the "**Acknowledgment checkbox"**, then sign at the bottom of the form. After signing, click the button located at the bottom right corner of the signature box. *(Figure 4.1.4)*
5. Enter the code shown in the image above. *(Figure 4.1.4)*
6. When finished, click the "**Submit**" button. *(Figure 4.1.4)*

Figure 4.1.4 Acknowledgement, Signature and Submission

7. To view the Archive Information Requests you have submitted, click on the "**Applications"** tab on the header, then select "**My Archive Information Requests"**. *(Figure 4.1.7)*
    a. By default, your Archive Information Request will be marked as "**Under Review**," and your documents will be sent to the appropriate reviewers.
    b. You will receive an email notification if any action is required from you.

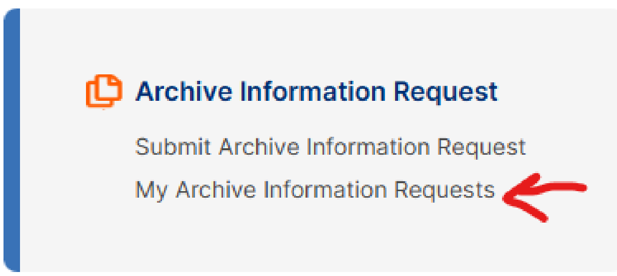


Figure 4.1.7 My Archive Information Requests

    c. You can view the applications you have submitted including the **Archive Request ID**, **Project Name**, **Borough**, **Request Status**, **Created on Date**, and any file attachments. *(Figure 4.1.7.a)*
    d. To review your application, click "**View"** by selecting the drop-down arrow on the right-hand side. (*Figure 4.1.7.a*)
        i. To submit a comment regarding your application after submission, refer to Section 8.

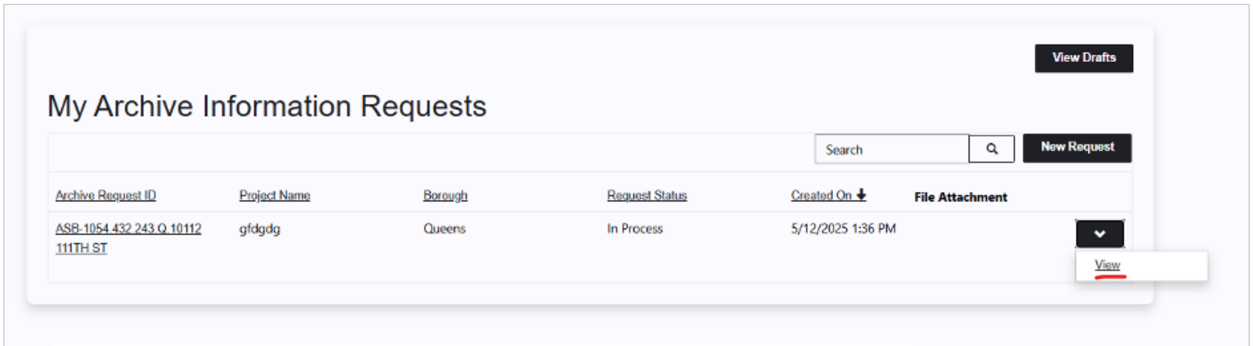


Figure 4.1.7.a View Archive Information Requests

4.1b NDA Requirement Process

If a Non-Disclosure Agreement (NDA) is required, your request status will be updated to **"In Progress – Awaiting NDA**".

Go back to the EPP EPIC and click on "[My Archive Information Requests](#)." *(Figure 4.1.b.1)*

Locate the request with the status "**In Progress – Awaiting NDA**", click the down arrow on the right-hand side, and select "**Submit New NDA.**" *(Figure 4.1.b.1)*

- *Recipient (Company or Organization) Type of organization (e.g., LLC formed under the laws of the State of New York)*
- *Recipient (Company or Organization) Describe the Company/Organization (e.g., Engineering Firm, Architectural Firm, etc.)*

Once the NDA has been received, you will see the request status as "**NDA Received.**"

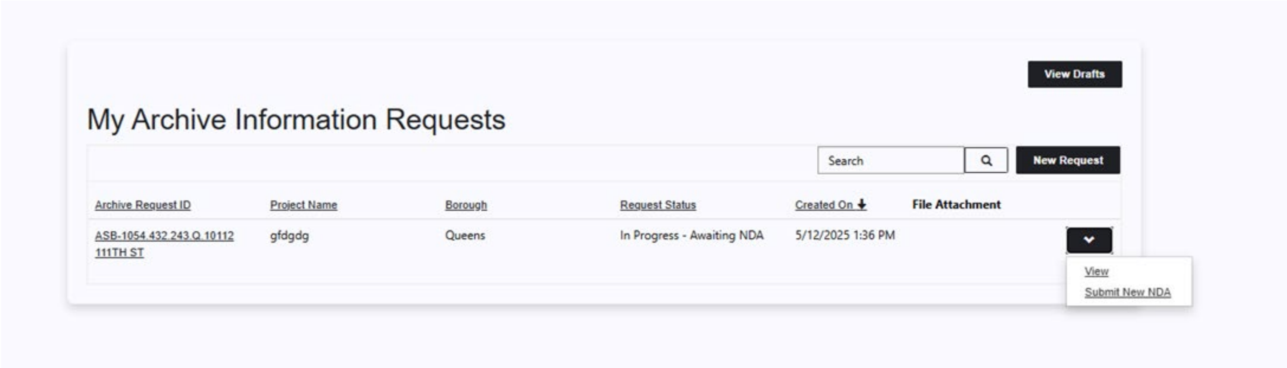


Figure 4.1.b.1 My Archive Information Requests

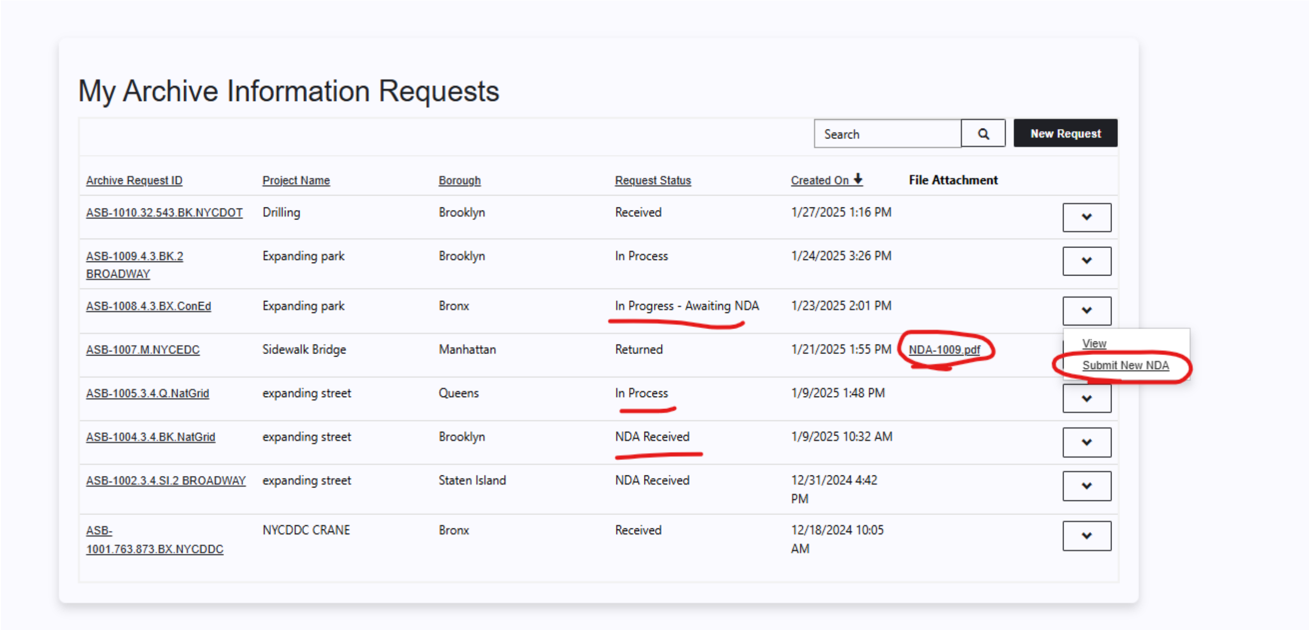


Figure 4.1.b.2 Status and Submit New NDA

4.2 Starting an application

Identify the appropriate Program Area before submitting your application:

1. **Adjacency**: Projects within 200 feet of MTA property that require review to assess potential impacts on transit assets. *(Figure 4.2)*
2. **Public Agency/Utility Project**: when the project sponsor is a public agency or utility company work, located within 200 feet of MTA property. *(Figure 4.2)*

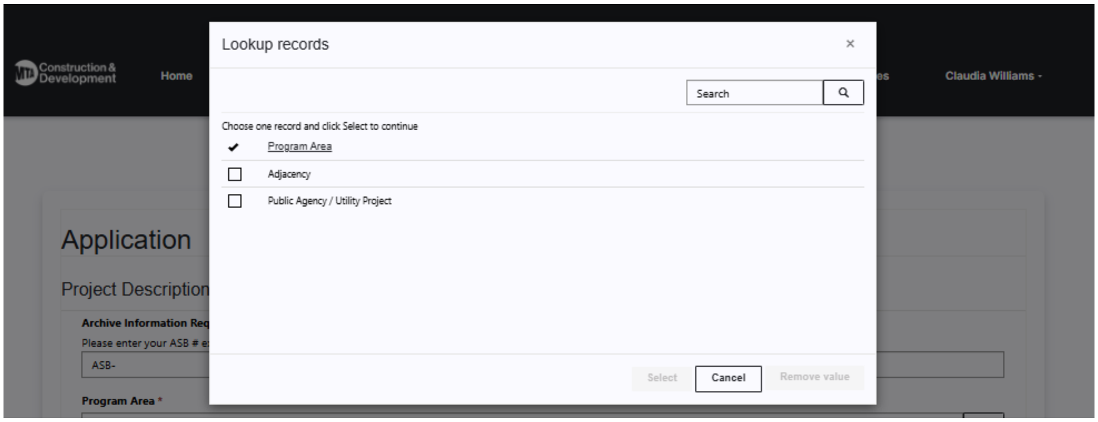


Figure 4.2 Program Area

4.3 Submitting Applications

1. Fill out the form for the applicable submission (**Archive Information Request**, **Application**, **Insurance Application**, or **Safety Application**)
2. Enter the verification code.
3. Click the "**Submit"** button (*Figure 4.3.a*)
    a. If submitting to the **Adjacency** Program, complete the required payment after submission.

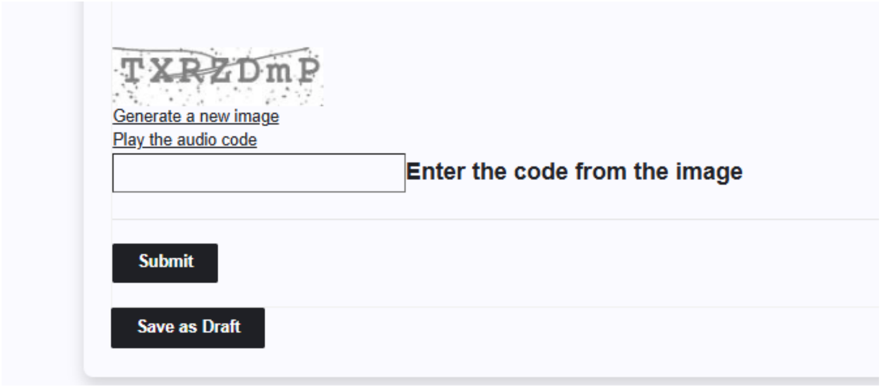


Figure 4.3 Submitting applications

4.3.a Saving / Viewing the Application as a Draft.

Save a draft and finalize the submission at a later date for the following applications:

- Archive Information Request
- Application
- Insurance Application
- Safety Application

    a. To do so, scroll to the bottom of the form and click the "**Save as Draft**" button. (*Figure 4.3.a*)

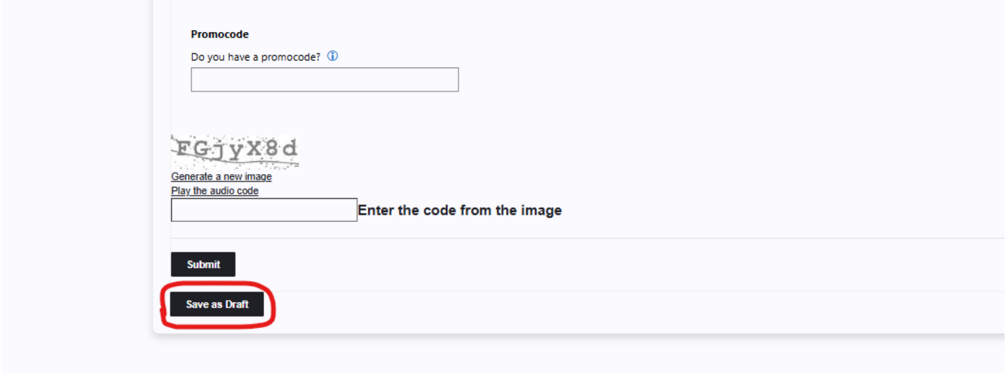


Figure 4.3.a Saving as Draft

b. After clicking on the "save as Draft" button, a pop-up message will appear. Please allow up to 5 minutes for your changes to update in the draft. (*Figure 4.3.a.1*)

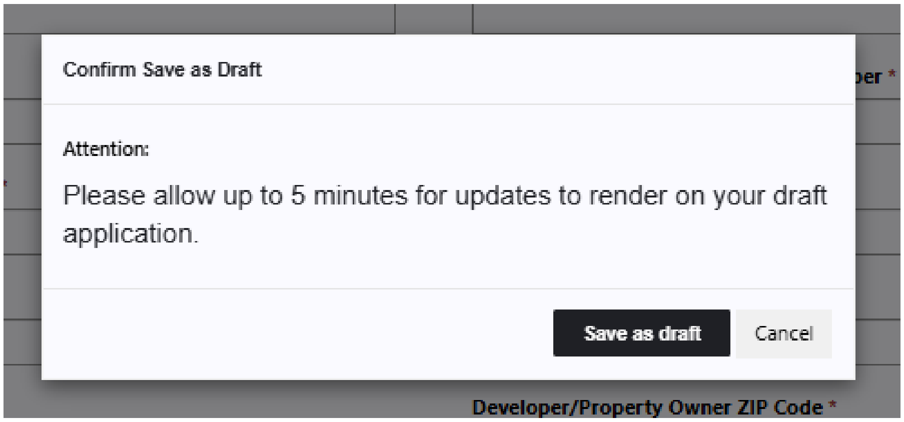


Figure 4.3.a.1 Pop Up Message

c. Once saved, you will be taken to where the Drafts are located for the specific application. The image below shows the "**My Application Drafts"** page. Each application has a similar Drafts page and follows the same process for saving and editing.

d. To continue editing your draft, click the down arrow on the right-hand side of the application and select **"Update Application"** to return to the form.

e. To view drafts for other applications, navigate to **My Archive Information Request**, **My Application**, **My Insurance Application**, or **My Safety Application**, and click **"View Draft"** in the top right corner. (*Figure 4.3.a.2)*

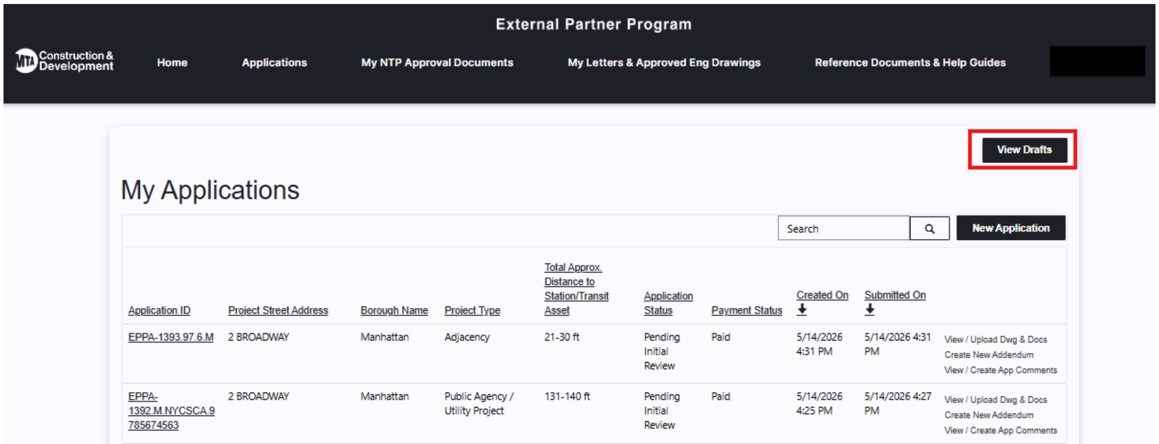


Figure 4.3.a.3 View Draft

f. You may submit an **Addendum** if your application has already received a final disposition and you need to provide additional information or modifications to the project. Once you begin the **Addendum Application**, you also have the option to **"Save it as a Draft"** before submitting. To do this, follow the steps outlined in Section 7b, and select **"Save as Draft"** instead of **"Submit."** This process follows the same steps described in items **a–d**. (*Figure 4.3.a.3*)

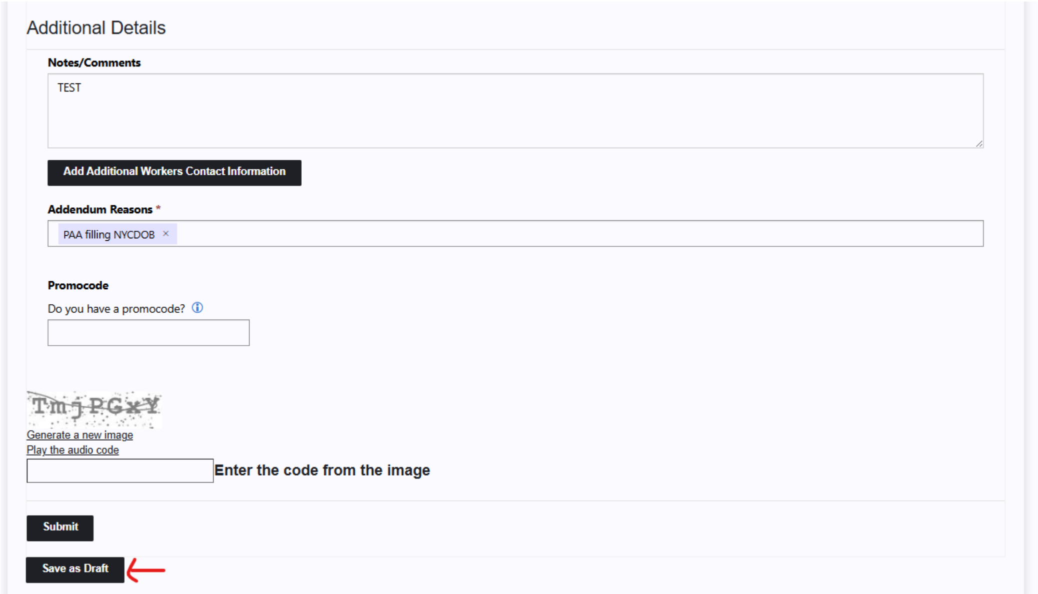


Figure 4.3.a.3 Saving Addendum as a Draft

Important Note: Please ensure all information is completed and thoroughly reviewed prior to submission. Changes can only be made while the application is in **Draft** status.

4.3.b Submitting and viewing an application

To submit an Application:

1. Click the "**Applications"** tab on the header.
2. Locate Application, then click on "**Submit Application"** (*Figure 4.3.b*).

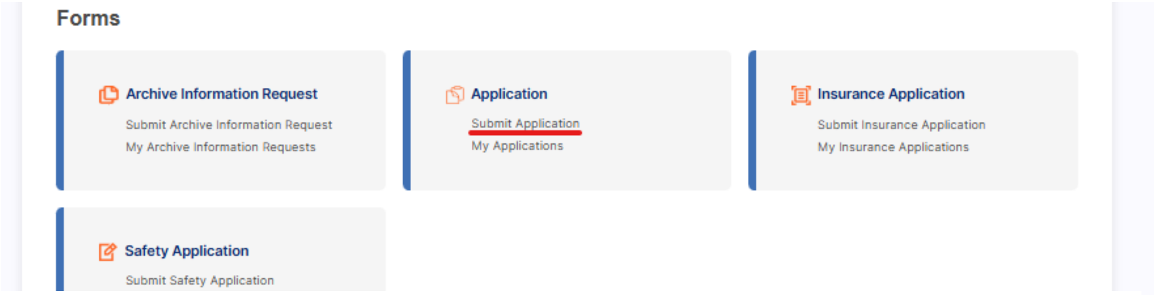


Figure 4.3.b Submit Application

3. To submit an Application, complete all required fields marked with a red asterisk (*). *(Figure 4.3.b1, 4.3.b2)*

a. Sections include but are not limited to:

  i. Project Description
  ii. Project Location
  iii. Applicant Information
  iv. NYS Licensed Professional
  v. Developer Information
  vi. Additional Details

b. **Note:** All project addresses for Adjacency applications are validated by USPS. The MTA does not accept Applications for project addresses that cannot be verified by USPS.

c. Public Agency Contract Number Format: Public Agency Contract Numbers must contain **alphanumeric characters only** (letters and numbers). The system does **not** accept spaces or special characters.

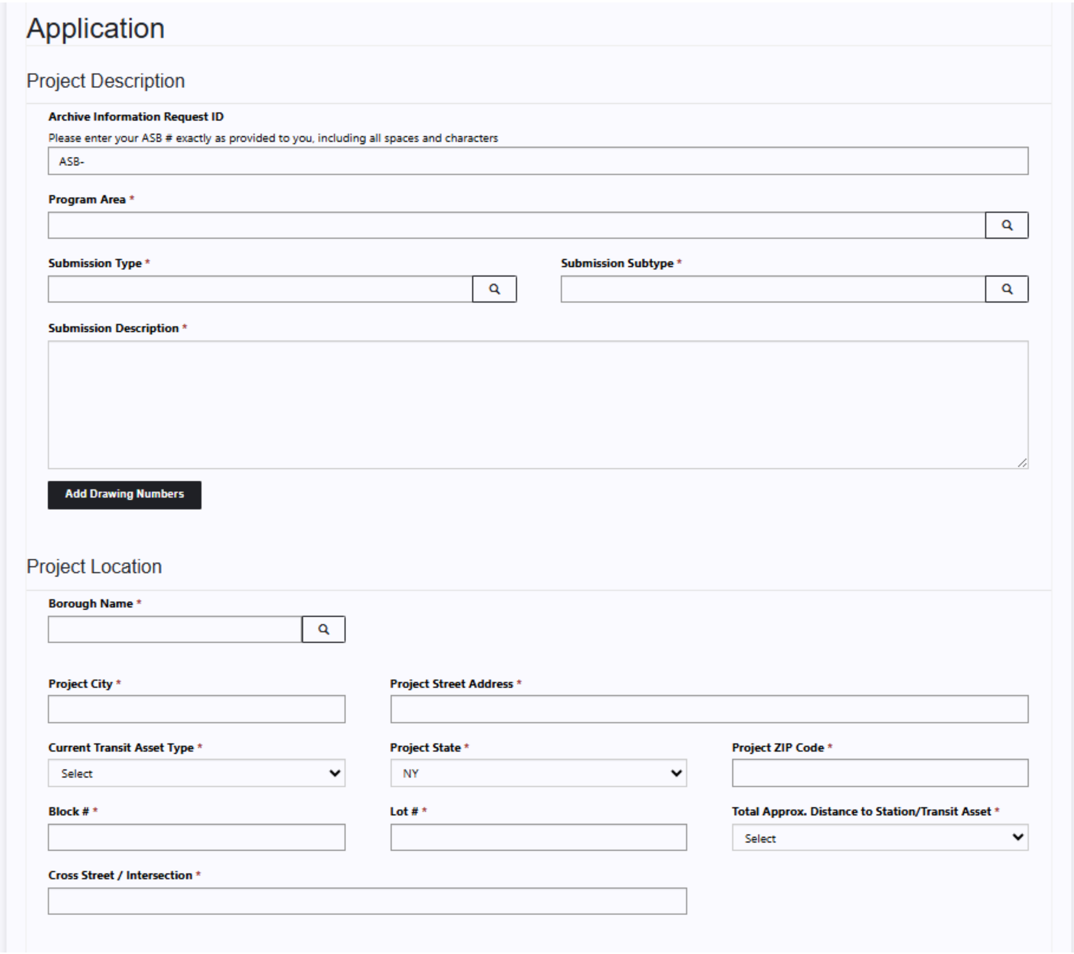


Figure 4.3.b1 Project Description and Project Location

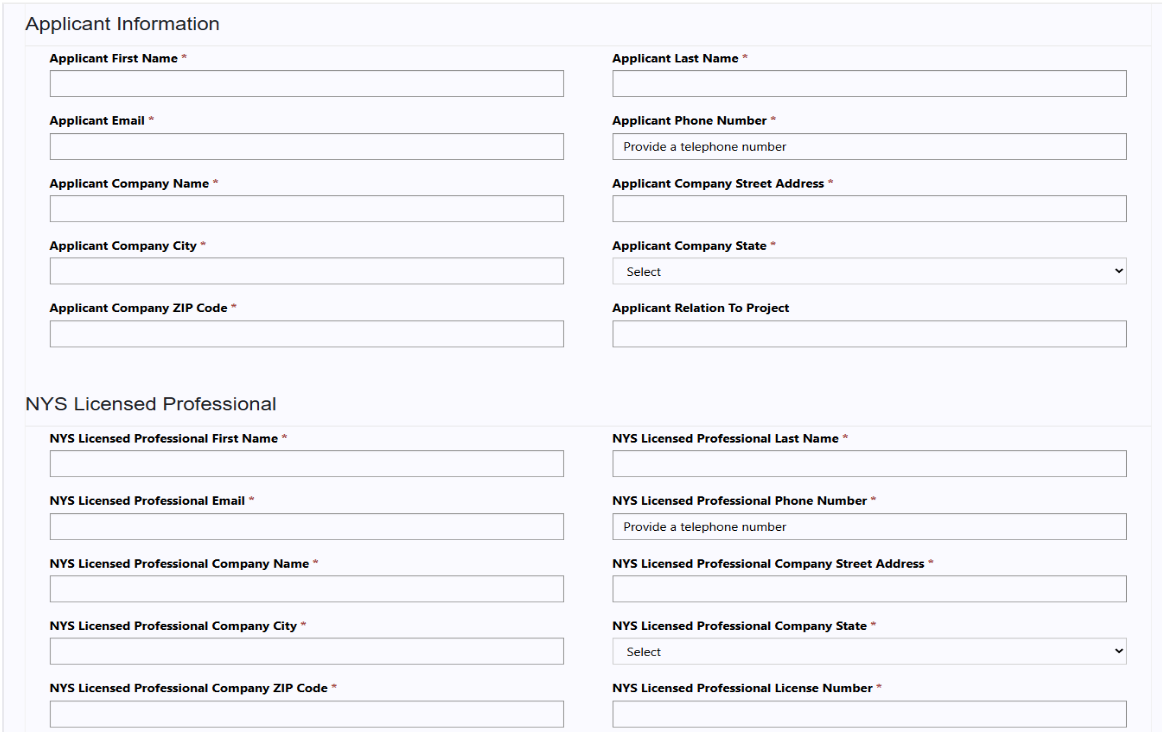


Figure 4.3.b2 Applicant Information and NYS Licensed Professional

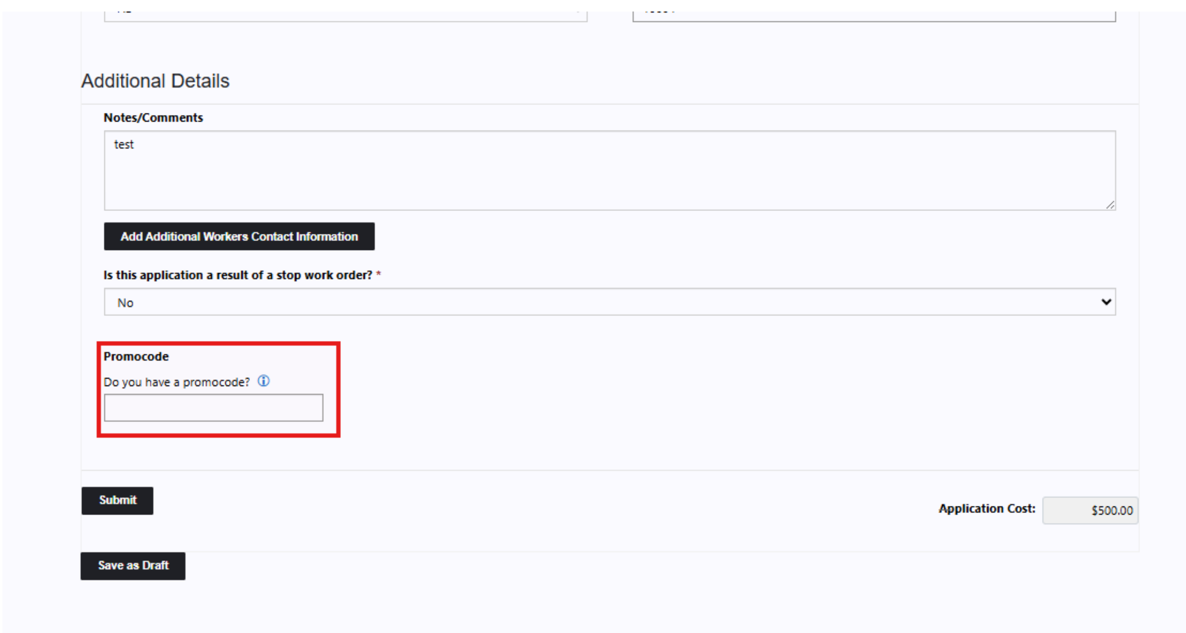


Figure 4.3.b.3 Additional Details, Promo Code and Submission

4. **Application Form Completion Requirement:**
   The application form must be **fully completed** for required information to populate in issued letters (e.g., **drawing numbers and related details**). Incomplete fields may result in missing information on the final letter.
5. Enter any Notes/Comments in the Additional Details section. *(Figure 4.3.b.2)*
   a. Any **Additional Workers Contact Information** added will also receive status updates regarding the Application you submit.
6. Fill out the **"Is this application a result of a stop work order?"** field.
   a. If **yes**, complete the **Stop Work Order Reasons (SWO)** section. It's recommended to upload an image of the SWO along with the proposed engineering drawings.
7. If you already have a Promo Code please enter it.
   a. Refer to Section 7d for guidance on how to request a Promo Code.
8. Enter the code shown in the image above at the bottom of the form. (*Figure 4.3.b.3*)
9. After completing all required fields, click the "**Submit"** button. (*Figure 4.3.b.3*)
10. To view the Application you have submitted, click on the "**Applications"** tab on the header, then click on "**My Applications"**. (*Figure 4.3.b.4*)

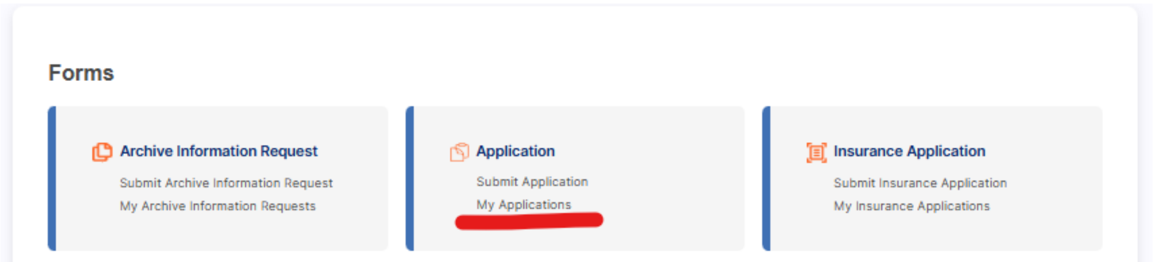


Figure 4.3.b.4 My Applications

   a. You can view details such as **Application ID**, **Project Street Address**, **Borough Name**, **Project Lot**, **Total Approximate Distance**, **Application Status**, **Payment Status**, and **Created On** date. (*Figure 4.3.b.9a*)
   b. To review your application, click **View Details** by selecting the drop-down arrow on the right-hand side. (*Figure 4.3.b.5*)
      i. To submit a comment regarding your application after submission, refer to Section 8.
   c. If your application is paid, you can upload additional drawings by clicking **Upload Document** (*Figure 4.3.b.5).* Once a disposition is issued, the applicant cannot upload more drawings.

Figure 4.3.b.5 Upload drawings

d. To create a new Addendum, refer to Section 4.3.c

4.3.c Addendum rules & submissions

An Addendum is a post-approval submission used to amend the original submittal (engineering drawings, reports, and other documents) due to:

- Expansion or deletion of the original scope of work.
- Field conditions changes.
- Or if required by another agency.

An Addendum allows applicants to update project documents while keeping the project's core registration details unchanged.

When an Addendum is filed with EPP, the following project information must match the original application form and will remain non-editable:

- Applicant, Owner, and Designer of Record (DOR) information
- Project's Contract or DOB Number
- Project Location (Block, Lot, Address)
- Project Bundled Addresses (if applicable)
- Project Submission Review Type (e.g., SOE, Demo)

4.3.c.1 Addendum Filing Rules

The Addendum Filing rules are as follows:

1. Only one Addendum can be in progress at a time per project.

2. A maximum of three Addenda is allowed per EPPA Number.
3. Addenda must be filed within 3 years of the original approval date.
4. An Addendum can only be submitted by the Primary or Secondary Applicant of Record.
5. The Addendum must be filed with the same Applicant of Record as the original submission.
6. The description of changes must be clearly provided in the Addendum application form.
7. A **new application** is required if any of the non-editable items listed above differ from the original submission.
8. If changes made to the scope of work exceed a certain percentage (20% or greater) of the total project square footage, a new application must be submitted instead of an Addendum.

Addenda are subject to EPP review and may be rejected if the submission criteria are not met. Rejected Addenda may require resubmission as a new application.

Important Notes:

- Addenda help maintain data consistency and ensure that only scope-related changes are filed, not project identity changes.
- Submitting incorrect or incomplete Addenda may lead to processing delays or application rejection.
- Applicants should verify whether their changes qualify as an Addendum or require a new application before filing.

4.3.c.2 Submitting a new Addendum

1. To Submit your Addendum*:*
   a. Go to "**My Applications"** under the Applications tab.
   b. Once the application is located, click the drop-down arrow in the right-hand corner of the page.
   c. Click the "**Create New Addendum"** button. The form will be auto-filled based on the initial Application. Only the **Addendum Reasons** section needs to be completed. Fill out the Addendum Reasons section, then click "**Submit"**. (*Figure 4.3.c.2*)

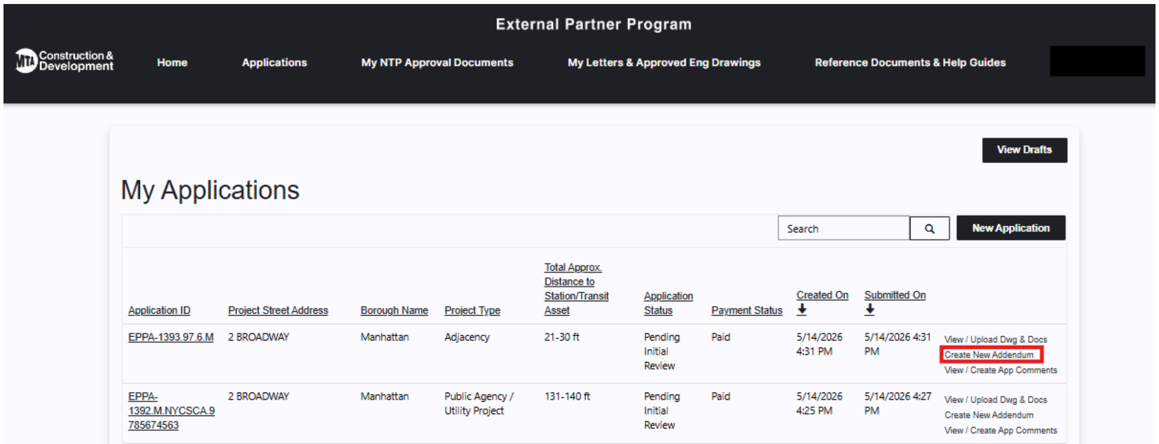


Figure 4.3.c.2 Create a New Addendum

4.3.c.3 Paying for a new Addendum

Payment processing follows the same procedure outlined for application payments. For detailed instructions, please refer to Section 6.

4.3.d Promo Code request & redemption

To request a Promo Code, scroll to the bottom of the page, locate the section labeled "**Promo Code**" and "**Do you have a Promo Code**." Hover over the "**i**" information icon to see the message: "**Click here to request a Promo Code."** (*Figure 4.3d*)

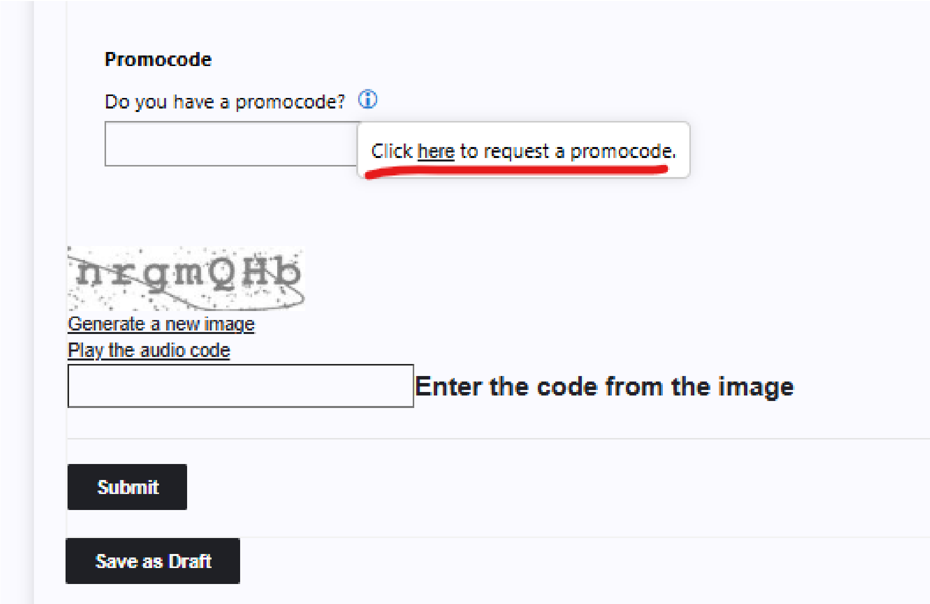


Figure 4.3d Request Promo Code

To request a Promo Code, all the fields in the Application must be completed. Once all fields are completed, a pop-up message will appear stating that once a Promo Code is requested, the application will be saved as a draft and locked from further modifications. The Promo Code will be sent via email. (*Figure 4.3.e and 4.3.f*)

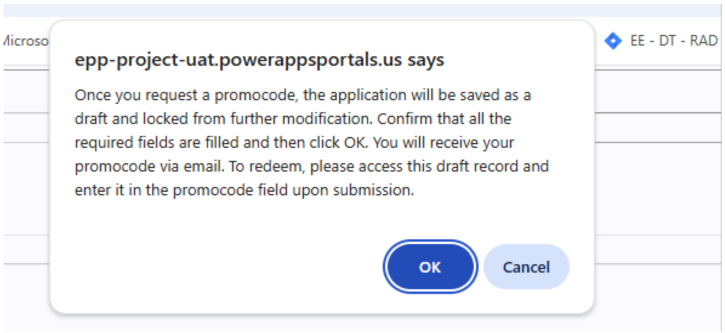


Figure 4.3e Pop Up Promo Code requested

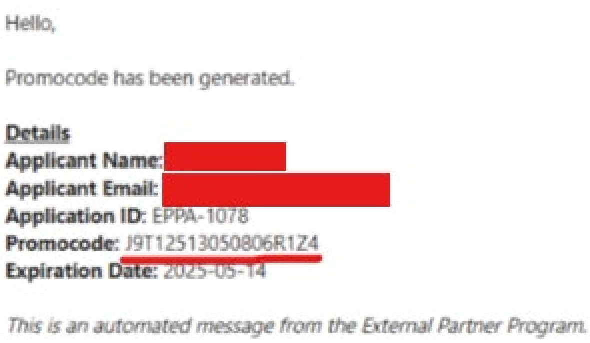


Figure 4.3.f Email confirmation

After receiving the Promo Code, return to 'My Application Drafts' and select 'Update Application' for the corresponding application. . Enter the Promo Code to redeem it and click "**Submit**."

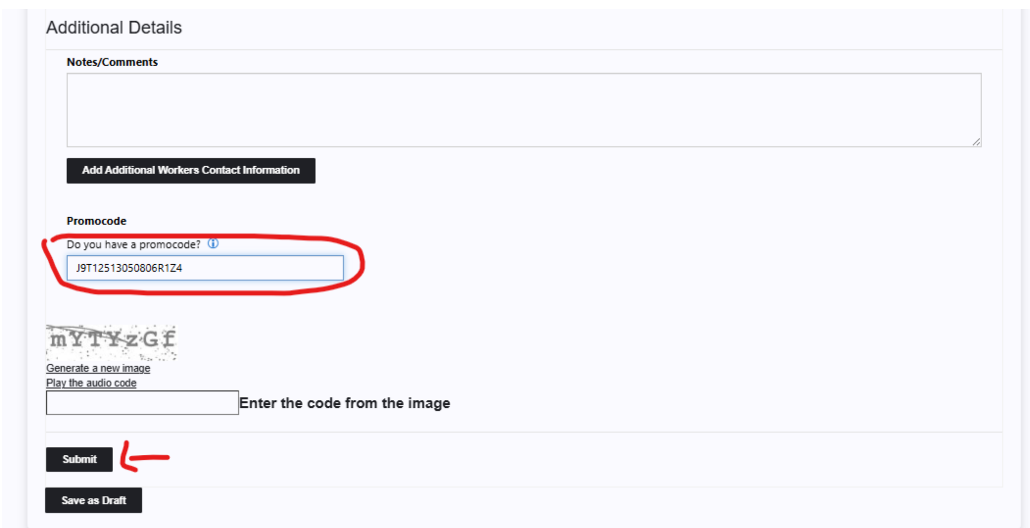


Figure 4.3.g Redeem Promo Code

Once the Promo Code is submitted, the application will be sent to EPP for distribution. (*Figure 4.3.g and 4.3.h*)

Figure 4.3.h Update Application

4.3.e Promo Code Timing

Promo Codes may only be requested **during the initial application submission**. Once requested, the application will be saved as a draft and locked from further modifications until the Promo Code is applied and the application is submitted.

4.4 Insurance Applications

To submit an Insurance Application:

1. Click the "**Insurance Applications"** tab on the header.
2. Locate Insurance Application, then click on "**Submit Insurance Application"** (*Figure 8.1*)

Figure 4.4 Submit Insurance Application

3. Before filling out the Insurance Application, refer to the **Insurance Reference links** section for more information about the fields required on the form. *(Figure 4.4.a)*

Figure 4.4.a Insurance Reference Links

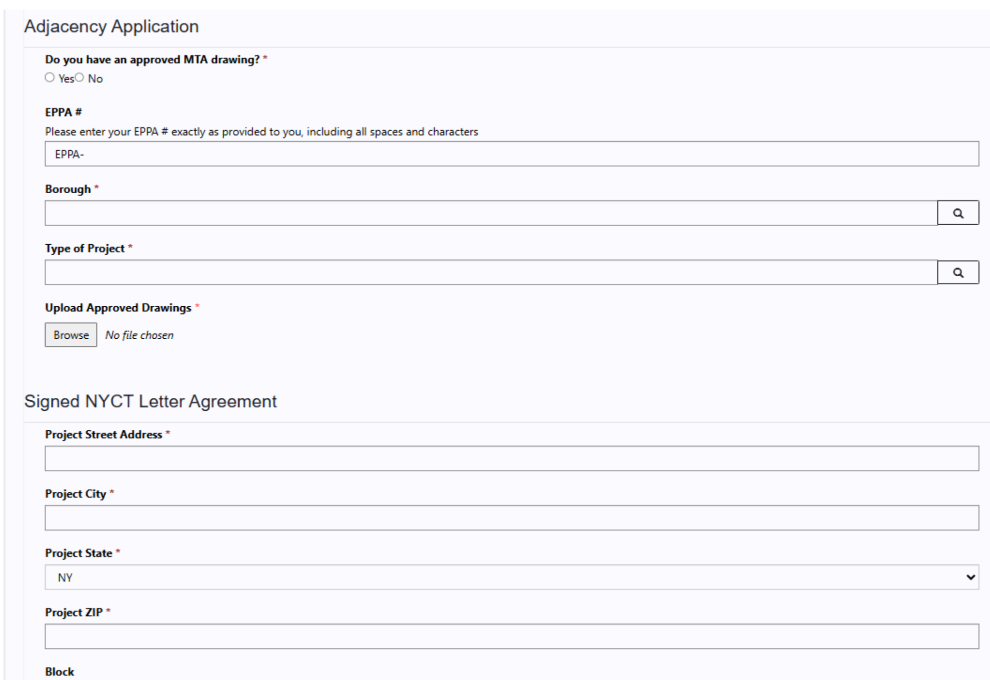
4. To submit an "**Insurance Application"**, all required fields, marked with a red asterisk (*), must be completed. *(Figure 4.4.1, 4.4.2, 4.4.3, 4.4.5, 4.4.6)*

i. Sections include but are not limited to: Application
ii. Signed NYCT Letter Agreement
iii. Permittee – Party Entering Agreement
iv. Authorized Signatory / Representative
v. Project Insurance Contact Person Details
vi. ACORD 25 / Certificate of Insurance
vii. Commercial General Liability (CGL) Insurance
viii. Umbrella / Excess Liability Insurance
ix. RRPL Insurance Policy
x. Environmental Work/Exposure
xi. Contact Information

b. **Note:** USPS validates all project addresses. The MTA does not accept applications for project addresses that USPS cannot verify.

c. *Most of these sections will require uploading documents such as:*

i. *Approved Drawings*
ii. *Signed NYCT Letter Agreement*
iii. *ACORD 25*
iv. *CG 20 26*
v. *CG 20 01*
vi. *CG 25 03*
vii. *ACORD 855*
viii. *Policy/Binder Upload*



Adjacency Application

Do you have an approved MTA drawing? *
Yes No

EPPA #
Please enter your EPPA # exactly as provided to you, including all spaces and characters
EPPA-

Borough *

Type of Project *

Upload Approved Drawings *
Browse *No file chosen*

Signed NYCT Letter Agreement

Project Street Address *

Project City *

Project State *
NY

Project ZIP *

Block

Figure 4.4.1 Application and Signed NYCT Letter Agreement Section

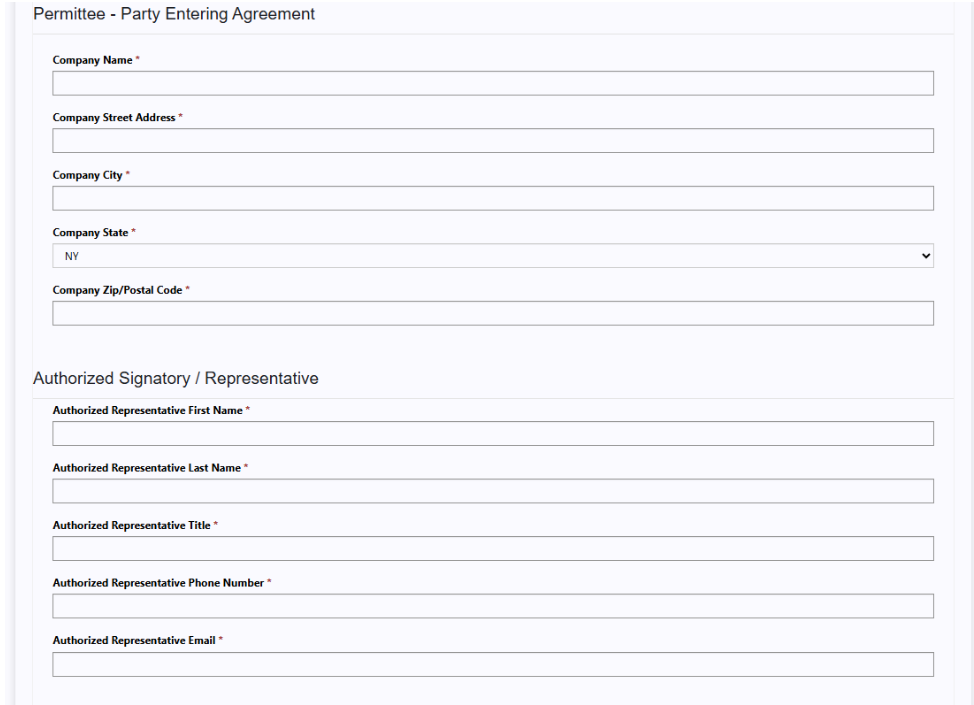


Figure 4.4.2 Permittee and Authorized Signatory/Representative Section

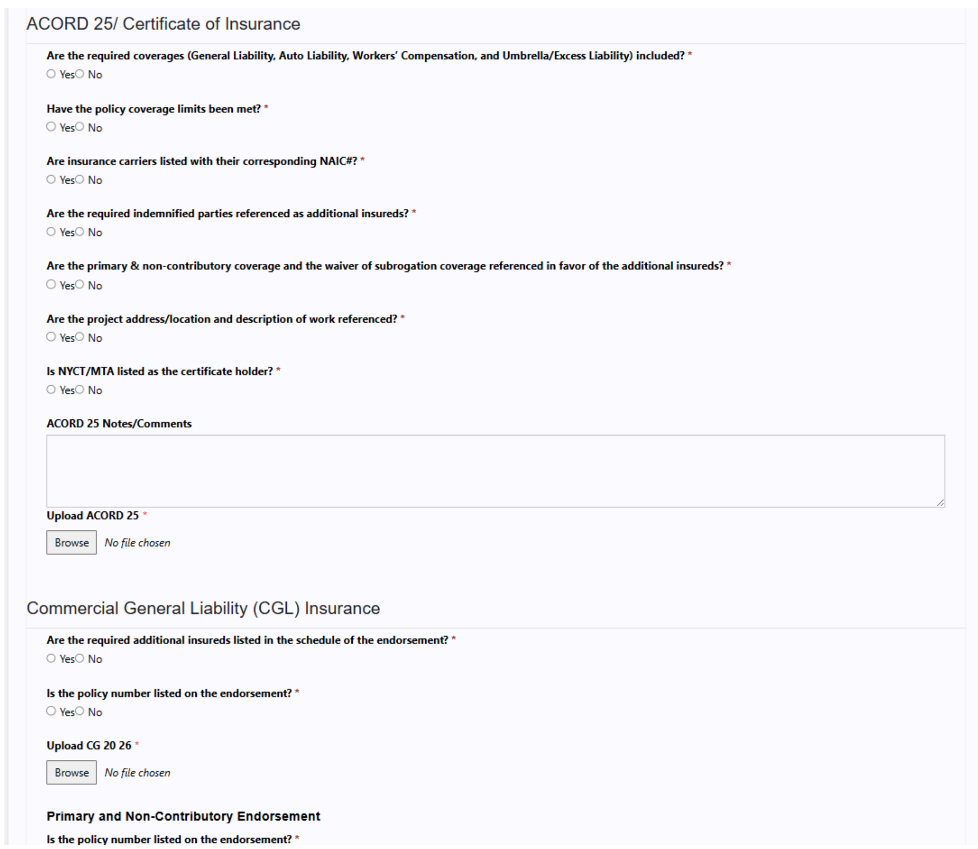
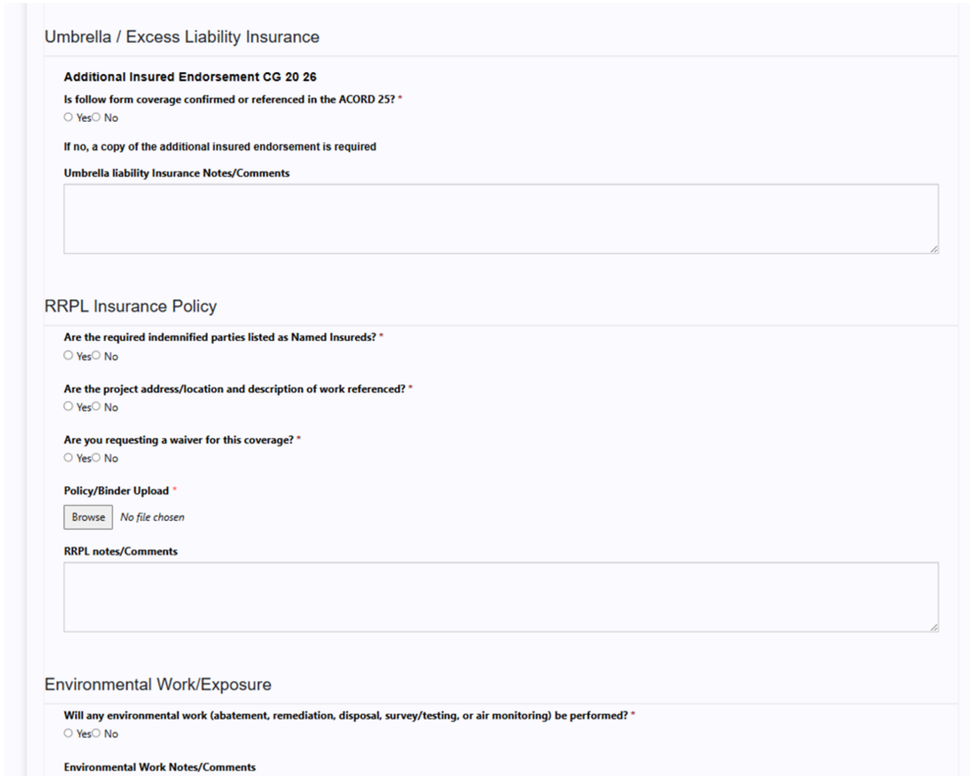


Figure 4.4.3 ACORD 25 and CGL Section



Umbrella / Excess Liability Insurance

Additional Insured Endorsement CG 20 26

Is follow form coverage confirmed or referenced in the ACORD 25? *

○ Yes ○ No

If no, a copy of the additional insured endorsement is required

Umbrella liability Insurance Notes/Comments

RRPL Insurance Policy

Are the required indemnified parties listed as Named Insureds? *

○ Yes ○ No

Are the project address/location and description of work referenced? *

○ Yes ○ No

Are you requesting a waiver for this coverage? *

○ Yes ○ No

Policy/Binder Upload *

Browse *No file chosen*

RRPL notes/Comments

Environmental Work/Exposure

Will any environmental work (abatement, remediation, disposal, survey/testing, or air monitoring) be performed? *

○ Yes ○ No

Environmental Work Notes/Comments

Figure 4.4.4 Umbrella/ Express and RRPL Section

Contact Information

Estimated Start Date *

M/D/YYYY

Estimated End Date *

M/D/YYYY

Estimated Cost *

Contractor Company Name *

Project Manager First Name *

Project Manager Last Name *

Project Manager Phone Number *

Provide a telephone number

Project Manager Email *

Figure 4.4.5 Contact Information Section

5. Enter the code shown in the image above at the bottom of the form. *(Figure 4.4.6)*
6. After everything is completed, click the "**Submit**" button.

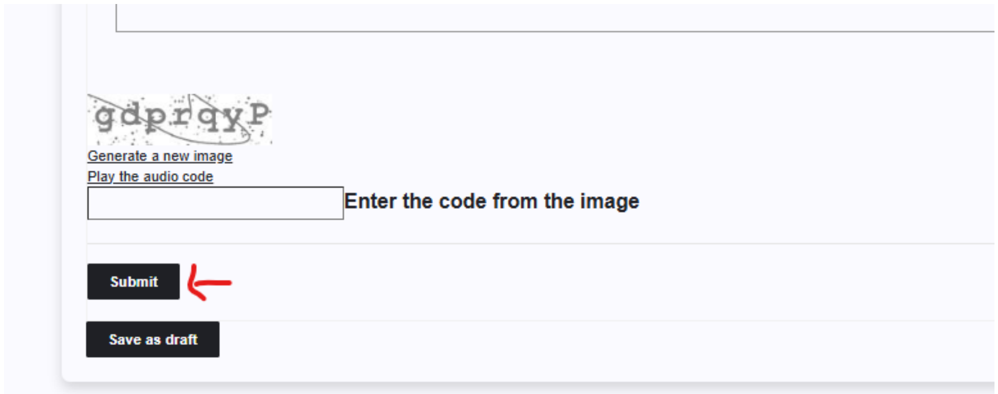


Figure 4.4.6 Submission

7. To view the submitted "**Insurance Application"**, click on the "**Applications"** tab on the header, then click on "**My Insurance Applications". ***(Figure 4.4.7)***

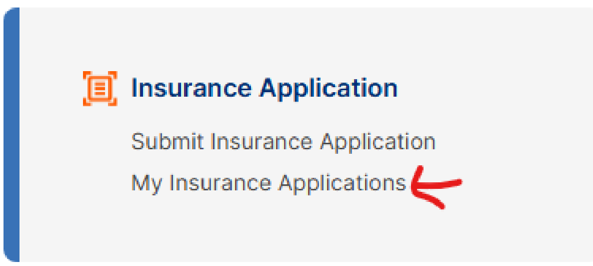


Figure 4.4.7 My Insurance Applications

   a. Details such as the **Insurance Submission ID**, **Borough**, **Project Street Address**, **Block**, **Lot**, **Insurance Status**, and **Created on** Date.

   b. To review the application, click "**View Details"** by selecting the drop-down arrow on the right-hand side. (*Figure 4.4.7.b*)

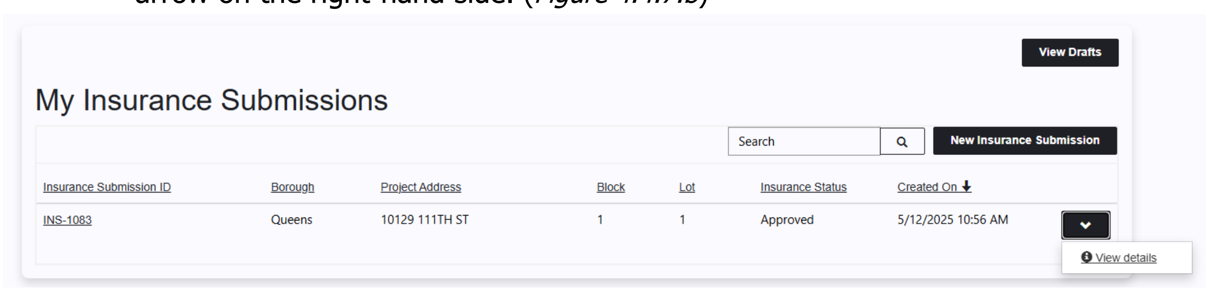


Figure 4.4.7.b My Insurance Submissions

      i. To ask a question regarding your application after submission, refer to Section 8.

4.5 Safety Applications

To submit a Safety Application:

1. Click the "**Applications"** tab on the header.
2. Look for Safety Application, then click on "**Submit Safety Application".** (*Figure 4.5*)

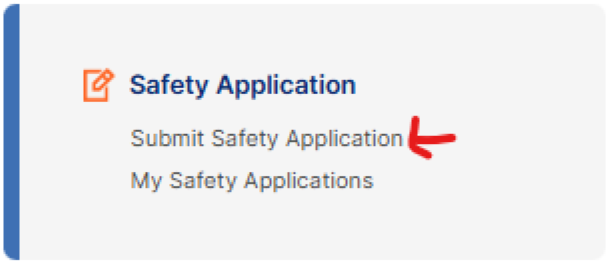


Figure 4.5 Submit Safety Application

3. To submit a "**Safety Application"**, all required fields, marked with a red asterisk (*), must be completed. (*Figure 4.5.3 and 4.5.3.a*)
   a. This includes sections such as:
      i. Project Information
      ii. Safety Requirements
      iii. Safety Information
      iv. Safety Oversight Contact Information
      v. Company Contact Information
   b. **Note:** USPS validates all project addresses. The MTA does not accept applications for project addresses that USPS cannot verify.

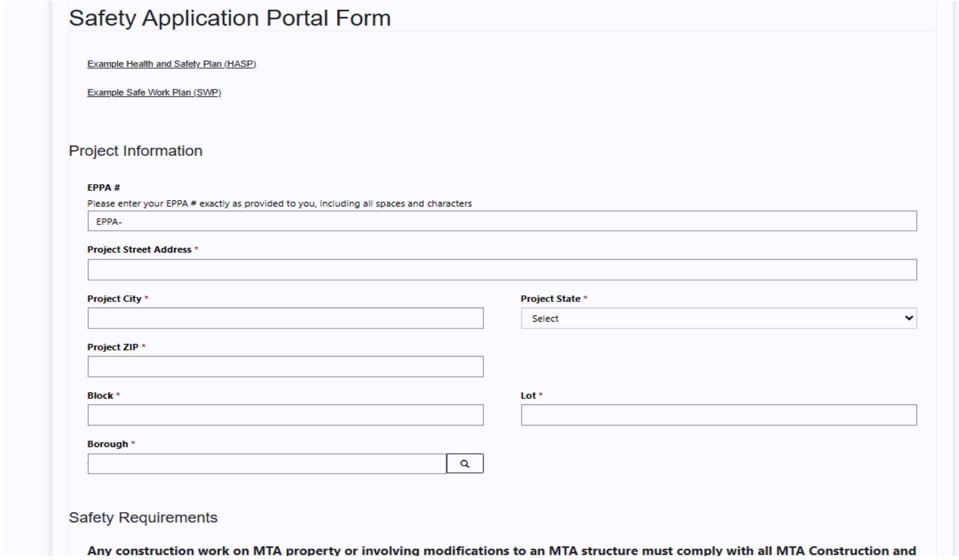


Figure 4.5.3 Project Information and Safety Requirement

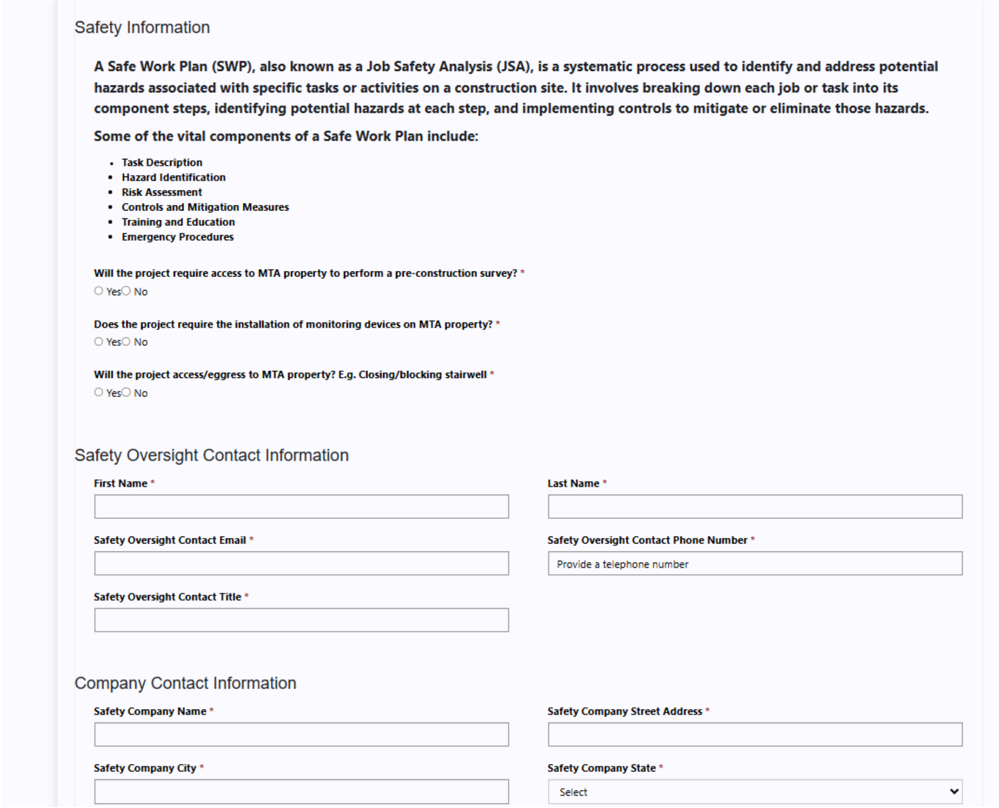


Figure 4.5.3.a Project Information and Safety Requirement

4. Enter the code shown in the image above at the bottom of the form. *(Figure 4.5.5)*
5. After all required fields are completed, click the "**Submit**" button.

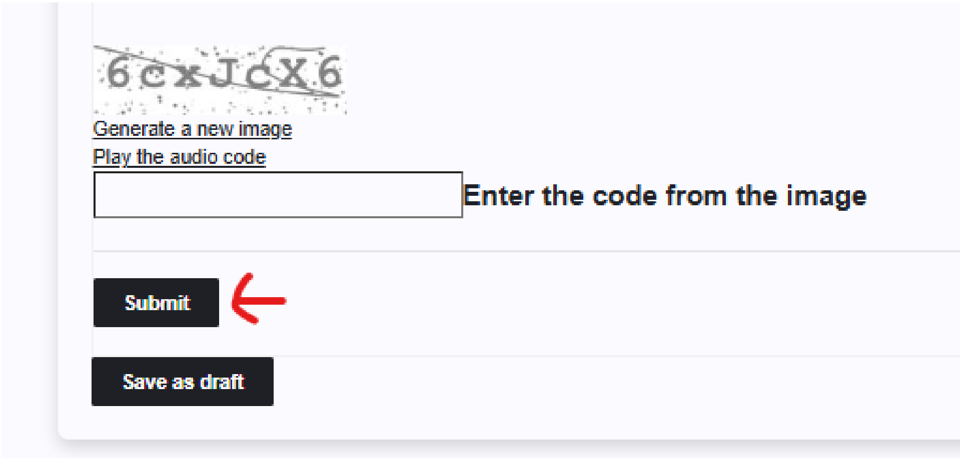


Figure 4.5.5 Submitting Application

6. To view the submitted "**Safety Application"**, click on the "**Applications"** tab on the header, then click on "**My Safety Submissions".** (*Figure 4.5.6*)
   a. Select the entry to view details such as the **Safety Submission ID**, **Borough**, **Project Street Address**, **Block**, **Lot**, **Safety Status**, and **Created On** date. (*Figure 4.5.6.a*)

b. To review the application, click **"View Details"** by selecting the drop-down arrow on the right-hand side. (*Figure 4.5.6.b*)
   i. To submit a comment regarding the application after submission, refer to Section 8.

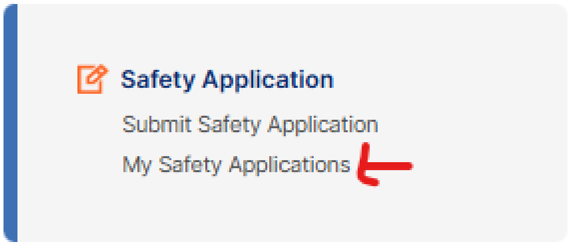


Figure 4.5.6.a My Safety Applications

Figure 4.5.6.b My Safety Submissions

Note: The **Scope of Work** field is required for all Safety Applications

5. Application Management

This section consolidates draft saving, inviting third parties, payment delegation, status tracking, and notifications.

5.1 Saving & viewing Drafts

Applicants can save any in-progress Application form (Archive, Adjacency, Insurance, or Safety Application) as a draft. Drafts can be resumed at any time by navigating to the **Drafts** section under each application type.

5.2 Uploading additional documents after submission

- If additional documents are required after submission:
- Navigate to "**My applications"**
- Select the relevant application.
- Locate the applicable application and select **View / Create App Comments**.
- Click "**Upload documents"** and attach the required files.
- Attach your files and save/submit.
- Once a disposition is issued, additional uploads may be restricted. Follow the on-screen options available for your application status.

Important Notes (Drawings Uploads):

- Once drawings are uploaded, they **may not be visible to applicants**, as the platform is configured this way.
- **Do not upload drawings in the Comments section.** Drawings submitted through Comments may not be visible to the Project Reviewer for stamping/review. Use the designated **Upload Documents/Upload Drawing** function within the application instead.

5.3 Status tracking definitions

Statuses include:

- **"Under Review"** – Application submitted and pending review.
- **"In Progress"** – Additional information or NDA required.
- **"Awaiting Payment"** – Application pending payment.
- **"Revise and Resubmit**" – Application conflicts with MTA Guidelines, Standards, Specifications or Agreements.
- **"Rejected"** – Application did not meet requirements.
- **"Approved"** – Application addresses or satisfies all MTA EPP requirements. The applicant may proceed with the next steps, as directed by the EPP.

- **“No Impact”** – Application addresses or satisfies all MTA EPP requirements and does not impact any of the MTA structures and its operations.

5.4 Receiving notifications (email alerts & preferences)

Applicants will receive automated email alerts for:

- Status updates (e.g., submission received, payment required, approved).
- Reviewer comments or requests for additional information.
- Application approvals and document availability.

6. Payment Process

Applicants must pay for the Application form and No Impact or Impact Letters. The Addendum has a one-time fee.

Applicants **must** enable JavaScript to run when using the application. If JavaScript is not enabled an error message will be displayed and applicants will not be able to proceed to payment. (*Figure 6.b*)

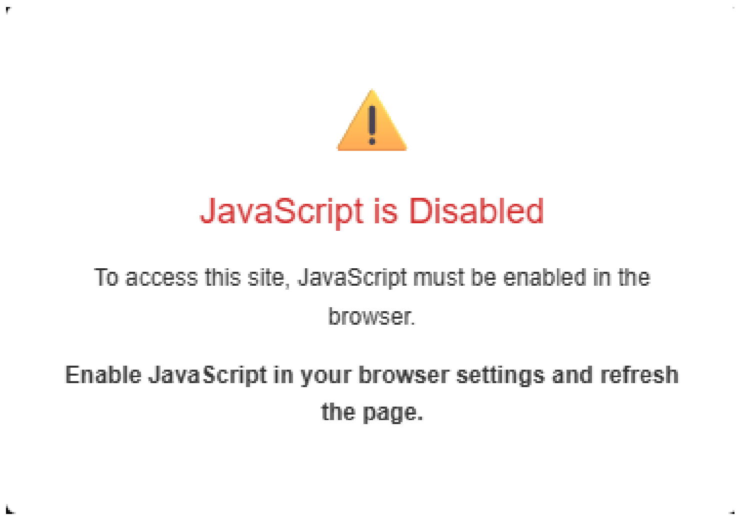


Figure 6.b – JavaScript Disabled

The system is designed to calculate costs based on your application criteria.

The calculated payment will be displayed. (*Figure 6)*

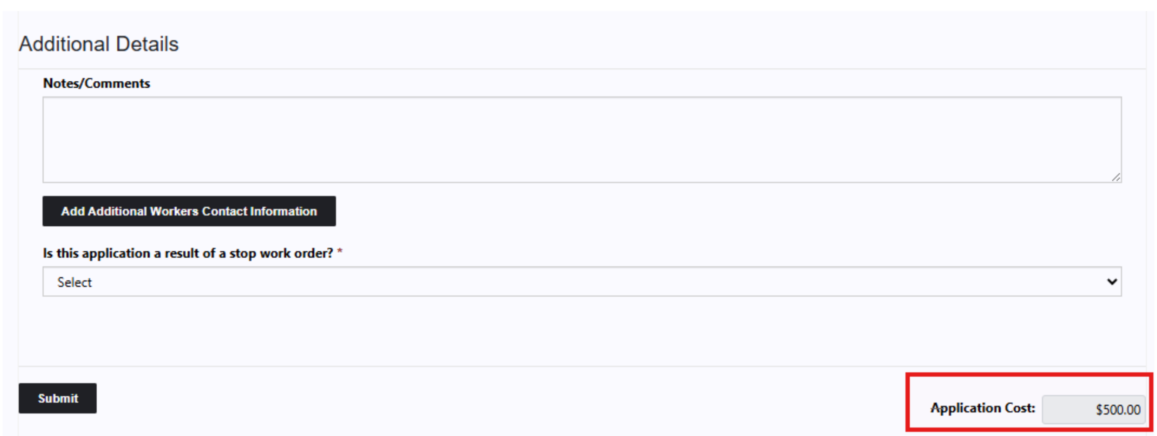


Figure 6 – Cost calculated

The system initializes payment and displays the popup form. Stay on the application until payment confirmation appears. (A payment success message will appear.)

1. After payment, complete the Application form. Confirm payment is final and non-refundable by clicking "I acknowledge the above statement," then submit. *(Figure 6.1)*

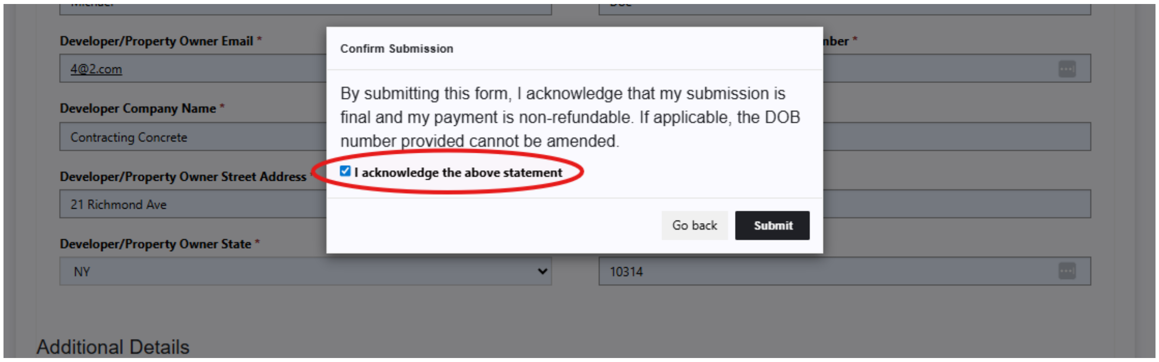


Figure 6.1 Acknowledge the statement

A new tab or window will open for payment. Remain on this tab until payment is complete.

A pop-up window will notify you that secure payment is initializing. (*Figure 6.1.a)*

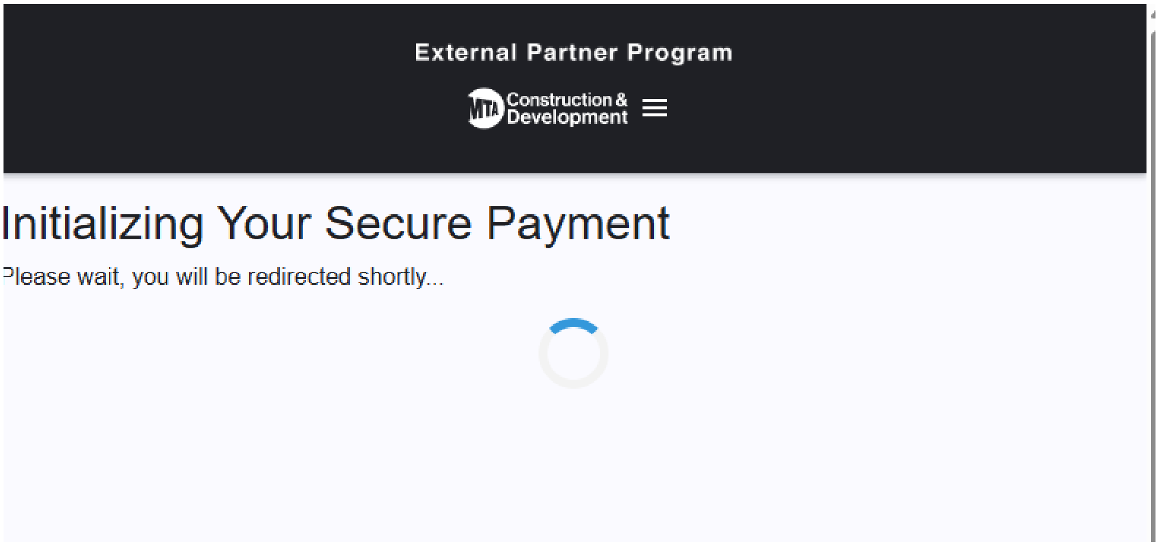


Figure 6.1.a Initializing your secure payment

Enter your name and payment card details into the new window. Finish by clicking "Pay." (*Figure 6.1.b)*

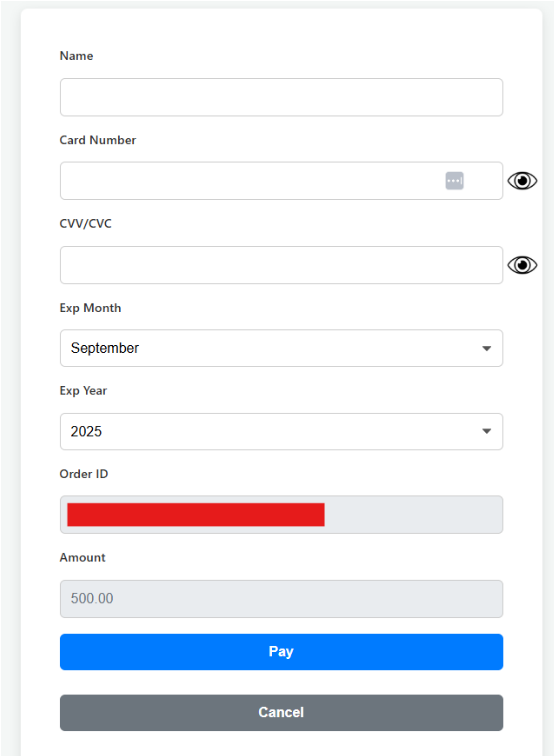


Figure 6.1.b Payment window

The system will verify the payment method. (*Figure 6.1.c)*

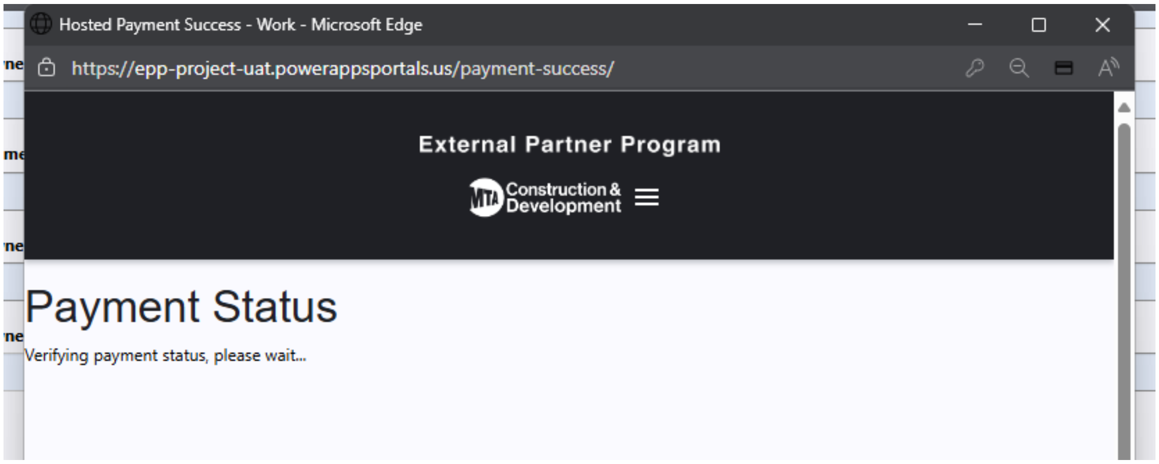


Figure 6.1.c Payment status

If the payment method is invalid, the transaction fails. Return to your application and retry with a different payment method. (*Figure 6.1.d)*

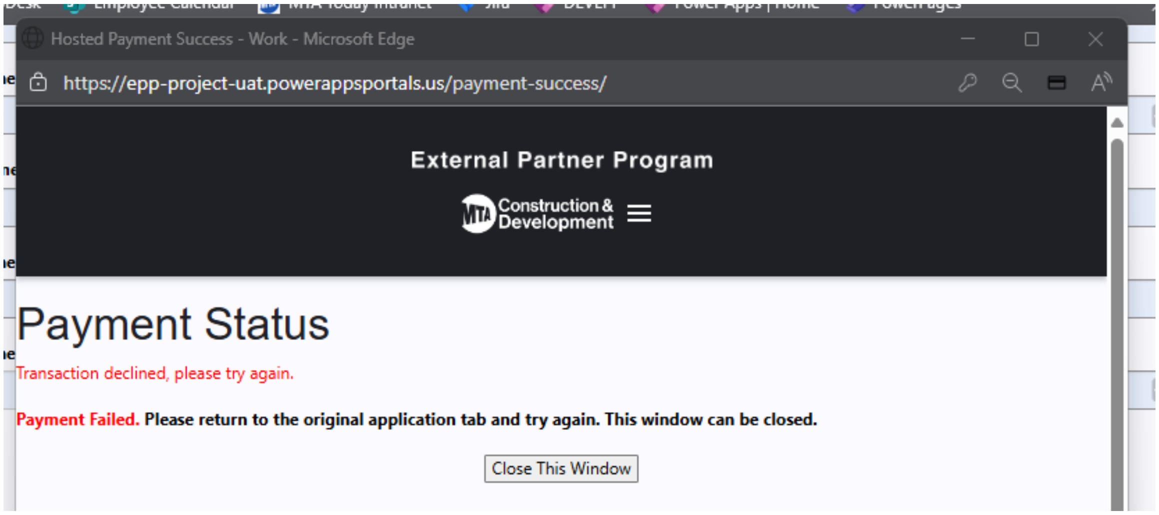


Figure 6.1.d Payment status failed

Once your payment is validated, the system processes your transaction and provides confirmation. *(Figure 6.1.e)*

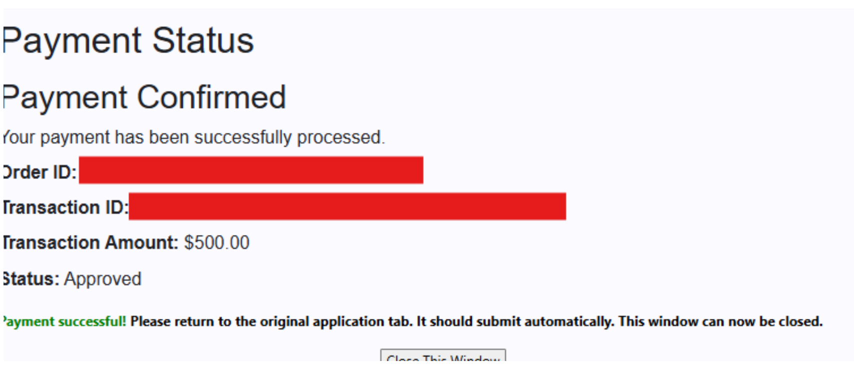


Figure 6.1.e Payment confirmed

Once payment succeeds, the application is submitted automatically. To retrieve approval and final drawings, payment must be completed. If unable to pay, save as a draft and return later.

6.1 How to Pay (Accepted Methods)

To pay for an application, click "Pay." You will then see four payment options. Start by selecting your preferred method:

1. Pay by Credit Card

a. To complete the payment, provide your credit card details.
b. Payment will be completed immediately.
c. Upload documents for review.

2. Pay by Promo Code

Promo codes may be requested when a project meets one of the following requirements:

1. Payment was previously made through the Asite platform, and proof of payment is provided.
2. The project is associated with a Public Agency that has an agreement with the MTA.

For more information, please refer to Section 4.3.d.

3. Accepted payment methods:

- Credit & Debit Cards (All major credit cards, i.e., Discover, Visa, Mastercard, Amex) & Promo Code.
- *We do not accept ACH payments at this time.*

6.2 Refunds, Cancellations & Failed Payments

- Refund requests must be submitted using the Refund Request Form.
- Refund eligibility is based on application status and review stage.
- Failed payments will automatically trigger a notification with instructions to retry.

7. Approval & Letters

7.1 Accessing Your Impact/No Impact Letter

To access letters that have been generated, click on "**My Letter**" in the main navigation of the EPP website. All letters issued for submitted applications will appear. Each entry will display the application name, letter type, payment status, issued to, and generated by. On the right side of each application, click the down arrow button to view two options: "**Pay Now**" and "**Apply Promo Code**."

If your Application is rejected, you will not receive a letter, only an email notification.

Refer to Section 4.3.d for instructions on how to redeem a Promo Code.

To make a payment, click "**Pay Now**" A pop-up will appear stating: "Please confirm that you want to make this payment." Click "**Confirm Payment**" (*Figure 7.1)* After entering the payment details, the system will redirect you to the My Letter page, where the "**Payment Status**" will update to "**Paid**"

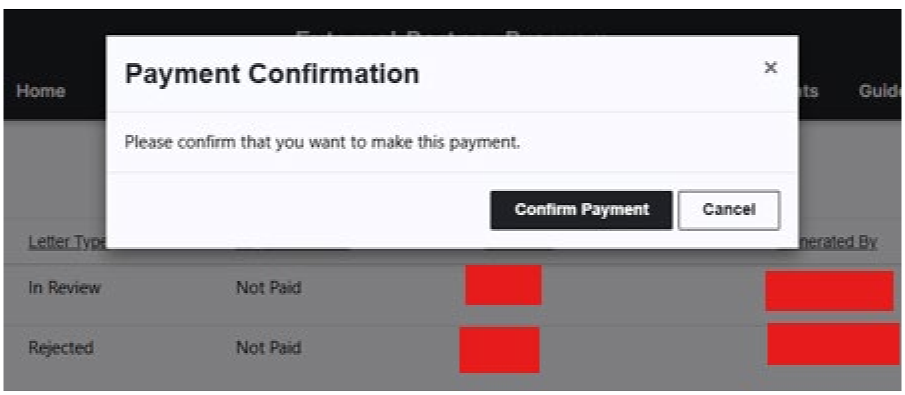


Figure 7.1 Payment Confirmation Message

7.2 How to download Letters and drawings

Once the application has been approved and the Letter fee has been paid, the applicant may access the **"My Letters & Approved Engineering Drawings"** section (Figure 7.2.a) to download the approval letter and the approved engineering drawings.

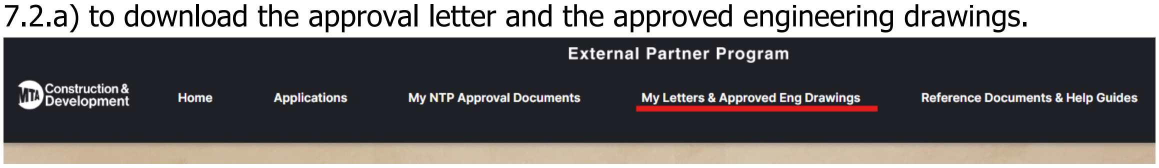
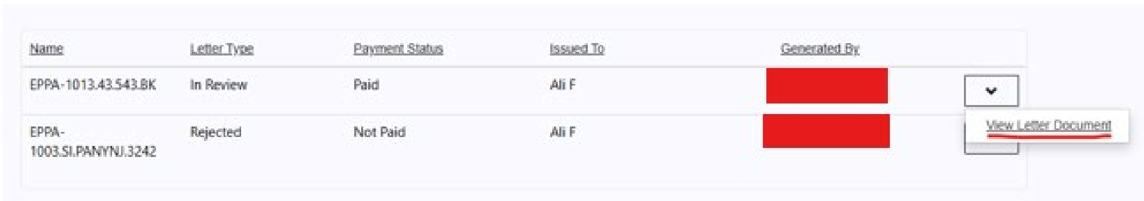


Figure 7.2.a My Letters & Approved Eng Drawings

To view the letter after making a payment or redeeming a Promo Code, click the down arrow on the right-hand side of the paid/redeemed application. Then, click "**View Letter**" The document name (the PDF that was submitted) and the Promo Code, if one was applied, will be displayed. *(Figure 7.2.b)*



Name	Letter Type	Payment Status	Issued To	Generated By
EPPA-1013.43.543.BK	In Review	Paid	Ali F	[redacted]
EPPA-1003.SI.PANYNJ.3242	Rejected	Not Paid	Ali F	[redacted]

Figure 7.2.b View Letter Document

7.3 Accessing your Notice to Proceed (NTP)

Once the application is approved, the reviewer will generate a **Notice to Proceed** (NTP) approval letter. An email notification will be sent when the application is approved and the NTP letter is available. (*Figure 7.2*)

DRAFT Your Notice to Proceed has been Approved CRM:0198089

Hello,

Notice to Proceed EPPA-1.24.2025-213-12 has been approved. It is now ready to be viewed.

Details
NTP Record: EPPA-1.24.2025-213-12
Related Application: EPPA-1002.213.12.BK
Applicant Name: Tom Robin
Applicant Email tmctommy@gmail.com
Applicant Company: Dewatering by Jim
Project Type: Adjacency

This is an automated message from the External Partner Program.

Figure 7.2 Approval Email

To view the approved Notice to Proceed , click on **"My Notice to Proceed Approval Documents"** on the header of the website.

a. You will see details such as the **Created-On** date, **Project ID**, **Approval Status**, and **NTP Document**. (*Figure 7.2.a*)

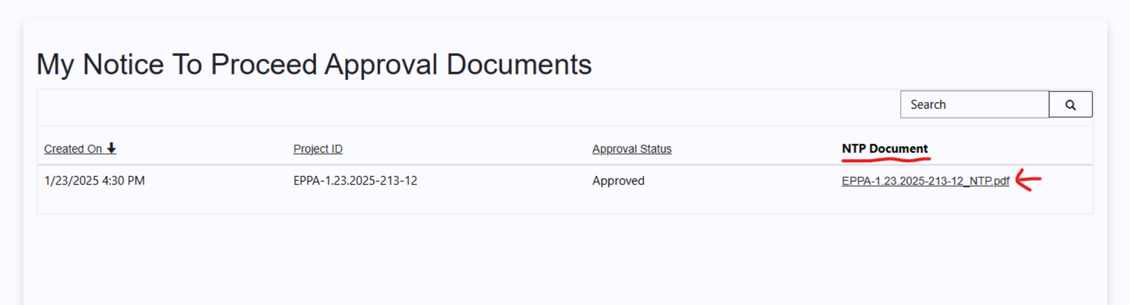


Figure 7.2.a My Notice to Proceed Approval Documents

b. To access the executed **Notice to Proceed Approval Document**, click the file link displayed in the **NTP Document** column of the application to view. (*Figure 7.1a*)

   i. After clicking the file link, the file will be downloaded. (*Figure 7.2.b*)

   ii. Open the downloaded file.

   iii. The executed Notice to Proceed approval document will be visible in the file.

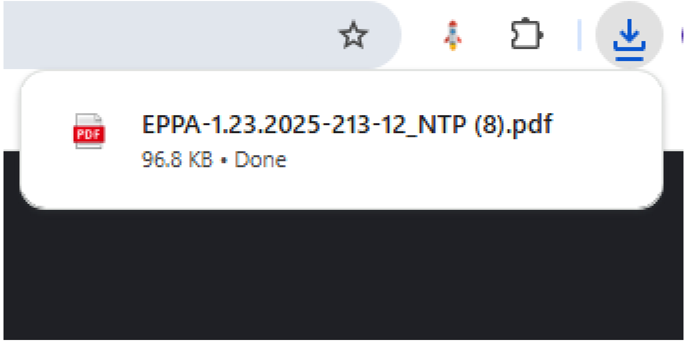


Figure 7.2.b Download File

7.4 Redeeming Promo Code for Letters

- To apply a Promo Code, go to the "My Letters & Approved Eng Drawings" tab in the header and click the down arrow on the application you want to select. In the dropdown, you will see two options: "Apply Promo Code" and "Pay Now."
- A Promo Code that has already been used for an application cannot be reused.

Using the requested Promo Code in the Application, enter one of the promo codes sent via email and click on "**Apply Promo Code**." Then, enter the Promo Code in the field provided and click "**Submit**."

8. Document Review & Comments

8.1 Adding comments

1. By default, the submitted documents will be sent to the appropriate reviewers.
2. An email notification will be sent each time there is a change in document status, such as when a document is received, reviewed, approved, rejected, or requires revision.
3. To manually check the status of the documents:
    a. Click on the **"My Applications"** tab on the header of the website.
    b. Review all your forms available for submission and review in the section under "**Forms**"
    c. Click on either **"My Archive Information Requests," "My Application," "My Insurance Application,"** or **"My Safety Applications"** to view the applications you have submitted. (*Figure 8.1.3*)

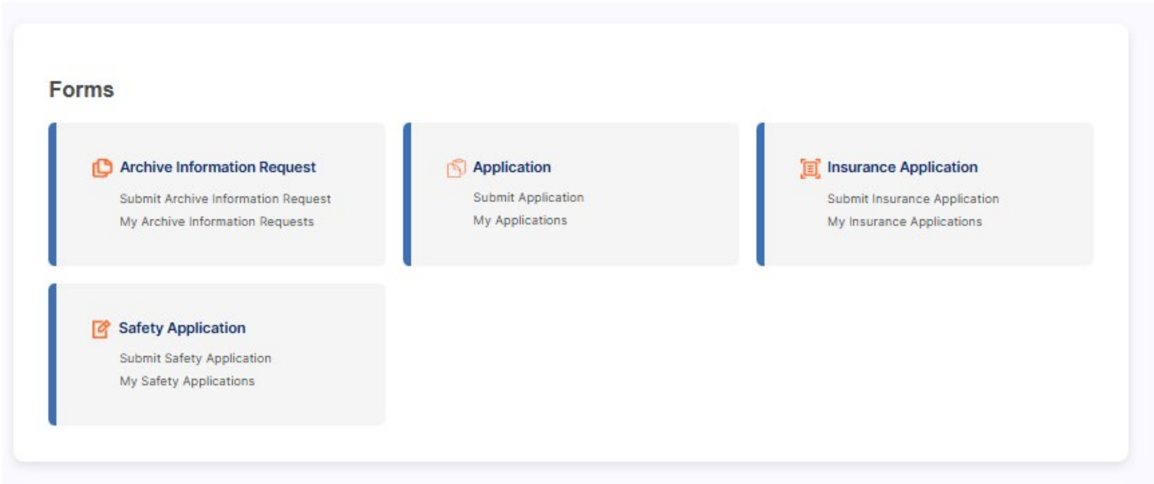


Figure 8.1.3 My Application Page

4. To add comments and review the entire submission, follow these steps: (*Figure 8.1.4*)
    a. Click the drop-down arrow next to the relevant application. Then click **"View."**

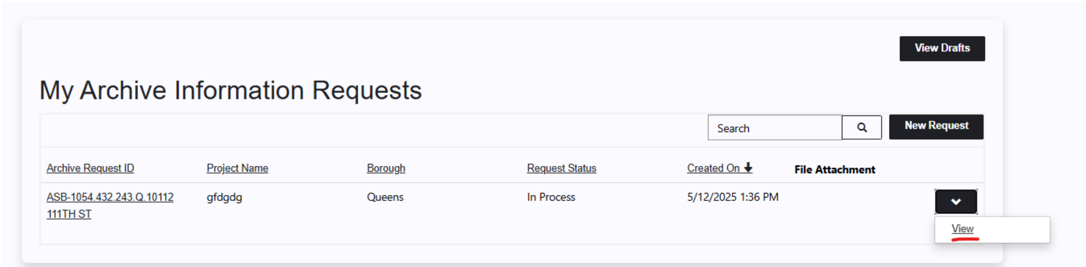


Figure 8.1.4 Viewing Submissions

b. To submit a comment regarding an application after submission, click **"Create"** to add a comment. (*Figure 8.1.4c*)
c. Fill out the **Subject** and **Comment** fields. Attach any supplemental documents, if necessary, then click **Submit.** (*Figure 8.1.4d*)

Submitted comments will appear with the application for reviewer access.

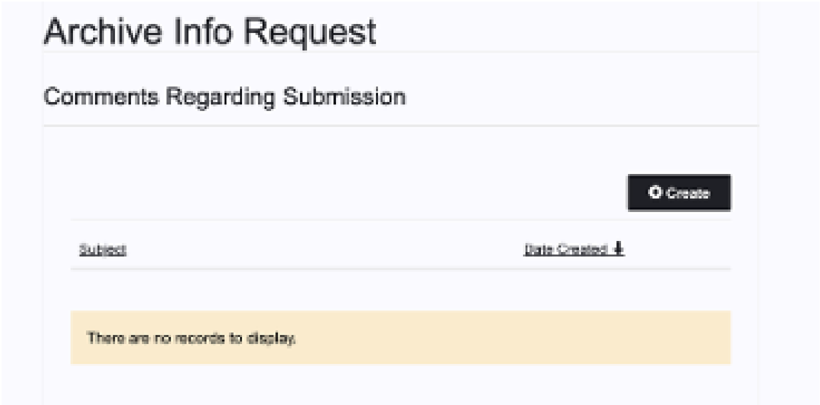


Figure 8.1.4c Comments Regarding Submission

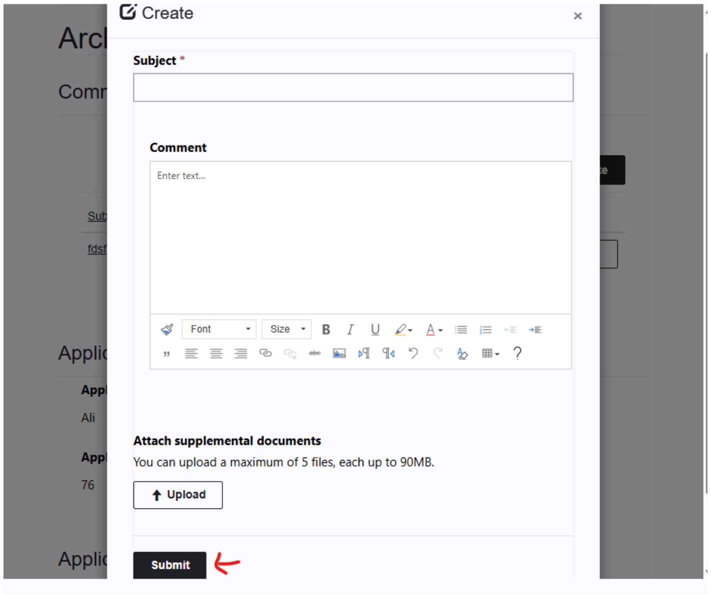


Figure 8.1.4.d Creating a Comment

8.2 How to View Reviewer Comments and Drawing Markups

Reviewer comments may appear in **two locations**:

a. Application-level comments (Comment Tool / "Comments Regarding Application")

1. Go to **Applications** → **My Applications**.

2. Find your application and select **View/Create App Comments**. (*Figure 8.2.a*)

3. Scroll to **Comments Regarding Application** (top of the view-only form).

4. Open the most recent comment to read reviewer instructions and requests.

Figure 8.2.a View/Create App Comments

b. Drawing-level markups (inside the drawing viewer)

1. Go to **Applications** → **My Applications** and open the application (**View / Create App Comments**).

2. Navigate to the **Drawings/Documents** section.

3. Select the relevant **drawing PDF** (be sure you are opening the latest version).

4. Open the file in the platform viewer to see markups.

5. Use the viewer's **Comments/Annotations panel** to review redlines, notes, and requested revisions.

If you do not see markups/comments:

- Confirm you opened the **correct file version**.
- Confirm your application is in a status where comments are available (e.g., **Under Review** or **Revise and Resubmit**).
- Perform a hard refresh: **Ctrl + F5** or **Ctrl + Shift + R**.

8.3 Responding to reviewer feedback

To respond to comments or mark-ups from reviewers:

1. Go to **My Applications.**

2. Select **"View / Create App Comments"** of the application under review.

Figure 8.3 View/Create App Comments

3. Find the **"Comments Regarding Application"** section at the top of the view-only application form.
4. Select **"Click Here to Create New Application Message / Comment"**.
5. Enter a **"Subject"**, your **"Comment"** body contents, and any needed supplemental documents. A maximum of 5 documents, each up to 90MB, can be uploaded per comment.
6. Select **"Submit"** to submit comments.

8.4 Uploading files to EPIC after revision

a. Navigate to "**My applications"**
b. Select the relevant application.
c. Click "**View / Upload Dwg & Docs"** and attach the required files.

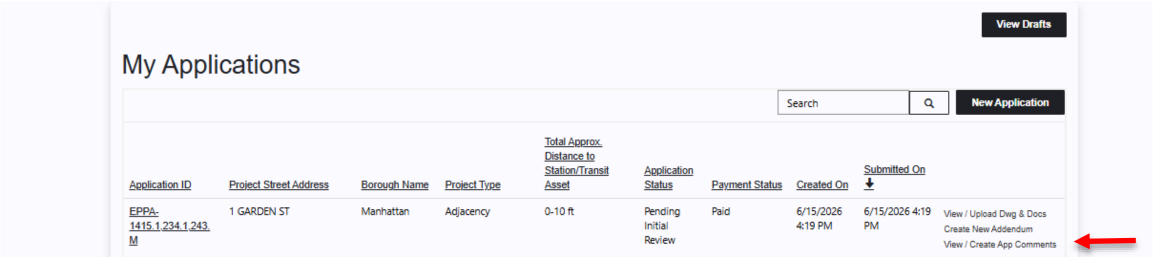


Figure 8.4 View/Upload Dwg & Docs

Important Notes (Drawings Uploads):

- Once drawings are uploaded, they **may not be visible to applicants**, as the platform is configured this way.
- **Do not upload drawings in the Comments section.** Drawings submitted through Comments may not be visible to the Project Reviewer for stamping/review. Use the designated **Upload Dwg & Docs** function within the application instead.

9. Compliance & Legal

This section includes NDA, confidentiality, Terms & Conditions of Use, Data Privacy, Applicant Responsibilities, and Accessibility/ADA compliance.

9.1 NDA & Confidentiality Requirements

Applicants may be required to sign a Non-Disclosure Agreement (NDA) before receiving sensitive project information, at MTA's discretion. All confidential data shared by MTA remains protected under applicable laws.

9.2 Data Privacy & Applicant Responsibilities

- Applicant data is stored securely in compliance with New York State and federal data protection laws.
- Applicants are responsible for ensuring the accuracy and completeness of submitted information.
- Misrepresentation or falsification may result in application rejection and further action at the discretion of the MTA.

9.3 Terms & Conditions of Use

By using the EPP platform, applicants agree to:

- Use the platform only for authorized submissions.
- Avoid sharing login credentials with unauthorized parties.
- Comply with all MTA policies and applicable laws.

10. Support & Resources

Information on contacting technical support, troubleshooting common issues, and accessing additional resources and training.

10.1 Contacting Technical Support

For assistance, applicants can reach EPP Technical Support:

- **Email:** EPP@mtacd.org

General inquiries and technical support inquiries may be sent to the above email.

10.2 Troubleshooting Common Issues

- **Cannot log in** – Reset password using "Forgot Password."
- **Did not receive email verification** – Check spam/junk folders, then request a resend.
- **File upload errors** – Ensure files meet naming conventions and size requirements (see Section 3.2 – 3.3)
- **Payment issues** – Confirm payment method is accepted (see Section 7.1).
- **Supported file types for annotation – Only PDFs are supported for annotation.**

11. Reference Materials

11.1 Reference Documents

The Reference Documents can be found on the External Partner Program here: [EPP Process Documents]

The Reference Documents are comprised of:

- *EPP General Notes*
- *NYCT route and section map*
- *MTA fees*
- *Insurance requirements – NYCT not for benefit*
- *Development Improvements Project Life Cycle Framework*
- *NYCT Route & Section Map*
- *Public Agency & Utility Force Account Estimate Request Form*

11.2 Appendix A: Glossary of Terms

1. **ACORD 25:** Certificate of Insurance form used to provide evidence of insurance coverage.
2. **ACORD 855:** Insurance form supplement used for specific liability coverage information.
3. **Application:** An application is required for construction projects within 200 feet of MTA property.
4. **Addendum:** A post-approval submission used to amend the original submittal due to scope changes or DOB requirements.
5. **C&D:** MTA Construction & Development, responsible for managing project reviews and approvals.
6. **CG 20 26:** ISO endorsement form providing Additional Insured status for scheduled persons or organizations.
7. **CG 20 01:** ISO endorsement providing Primary and Noncontributory coverage.
8. **CG 25 03:** ISO endorsement covering the Designated Construction Projects' general aggregate limit.
9. **DOB:** New York City Department of Buildings.
10. **Draft:** An application that has been saved but not yet been submitted.
11. **DOR (Designer of Record):** Licensed professional engineer, architect or landscape architect responsible for design and compliance of submitted documents.
12. **EPPA Number:** Unique identifier assigned to an External Partner Program application.
13. **EPP Final Dispositions**
    The EPP final disposition categories are as follows:
    1. **Rejected.**
       Applications will be automatically rejected when:
       i. *Application is missing DOB number (when applicable).*
       ii. *MTA as-built drawings. are not overlaid on the proposed engineer drawing submitted for review.*
       iii. *Engineering drawings without sufficient information (Sketches are not accepted in lieu of engineering drawings).*
       iv. *Missing ZFA disposition when the project is within 50 ft of MTA structures.*
       v. If an application is rejected, an email will be sent via EPIC notifications. Follow the instructions in the email to resubmit the files.
       vi. The Addendum scope is different from the original approved scope.

    2. **Revise and resubmit.**
       Applications will be deemed as Revise and Resubmit when:

i. When comments are issued to the application (layout or engineering comments) and require the applicant to address these comments.
ii. Correct layout of MTA structure.
iii. The Impact on the MTA structure is to be engineered.
iv. Missing key information such as: General Notes, Insurance, and NYS Professional seal.
v. It needs additional information, such as details and calculations.
vi. If an application is deemed Revise and Resubmit, an email will be sent via EPIC notifications. Follow the instructions in the email to resubmit the files.

3. **Approved.**

Applications will be deemed as Approved when:

i. The application addresses or satisfies all MTA EPP requirements. The drawings will be stamped/approved, and an Approval Letter listing all approved drawings will be issued by EPP.
ii. An email notification will be sent to the applicant via EPIC notifications.
iii. The next step is to proceed to pay for the Letter of Approval. After the Letter is paid, the applicant can download the documents.
iv. The Letter of Approval will be available to download only when the EPP team uploads the document to the online platform.
v. Upon approval, the applicant shall follow the next steps as directed by EPP.

4. **No Impact**

Applications will be deemed as "No Impact" when it addresses or satisfies all MTA EPP requirements and does not impact any of the MTA structures and its operations. A No Impact Letter listing all No Impact drawings will be issued by EPP.

5. **Acknowledged**

An application file will be deemed as "Acknowledged" when:

i. When the Project Reviewer has accepted the document as valid.
ii. No other action is required by the applicant.

6. **Accepted for Information Only**

An application file will be deemed "Accepted for Information only" when:

i. The files have been accepted by the Project Reviewer, but no other process is necessary at this point.
ii. No other action is required by the applicant.

7. **No Objections taken**

An application file is deemed as "No Objections Taken" when:

i. The Project Reviewer has no further comments regarding this document.
ii. No other action is required by the applicant.

8. **Impact/No Impact Letter:** Official document issued by MTA indicating whether a project impacts transit infrastructure.

9. **Insurance Application:** Form submitted to provide required insurance documentation for construction near MTA property.
10. **MFA (Multi-Factor Authentication):** A Security feature requiring more than one method of authentication to verify user identity.
11. **MTA:** Metropolitan Transportation Authority.
12. **NDA (Non-Disclosure Agreement):** Legal contract requiring confidentiality before sharing sensitive project data.
13. **NTP (Notice to Proceed):** Approval letter issued by MTA granting authorization to begin work.
14. **Promo Code:** Unique code issued by MTA for payment adjustments or waivers in the EPP system.
15. **RRPL Insurance:** Railroad Protective Liability insurance is required for construction near the railroad infrastructure.
16. **Safety Application:** Form submitted to provide project safety plans and oversight contact information.
17. **USPS Address Validation:** A system checks to confirm addresses entered match United States Postal Service records.