Information Session for the EIA Respondent Portal Annual Survey of Coal Stocks & Coal Exports (EIA-8A)

Wednesday, January 12, 2022

U.S. Energy Information Administration
Office of Energy Statistics
This presentation addresses the following:

- What’s new & why
- How to register for and use the new EIA Respondent Portal
- How to sign in, navigate and submit the webform, including data validation
- Timeline for registering and reporting
- Ask questions and get answers
EIA has developed a **new** Respondent Portal to submit your EIA-8A form via a webform.

For reference, respondents can download the form and instructions at [https://www.eia.gov/survey/](https://www.eia.gov/survey/)

**Why the New Portal?**

- New interface - same look on survey form
- More user friendly; reduced respondent burden
- Respondent has more control in data validation
- More secure transmission of data
How to Access the EIA Respondent Portal

Access Instructions

All respondents must register for an account in the EIA Respondent Portal to access the EIA-8A webform. Respondents will receive a one-time email with a new Entity ID that will appear in the Respondent Portal. Once registered, respondents can use the Sign In section of this page.

• Follow the link to EIA’s online reporting system which will be provided
• First time users click on the Register button
• Please use the Google Chrome internet browser
• Use this link to access the EIA Respondent Portal: https://survey.eia.gov
Registration via the EIA Respondent Portal

Access Instructions

Enter the information provided to you via the invitation email to register:
• Email
• First and last name
• Entity ID
• Phone
• Company name

*Note: Please include all contact information provided in the invitation email, including Entity ID. We recommend using the copy/paste function to avoid mistakes.

Optional information includes your job title and manager’s identification information.

Click on the radial button yes/no to indicate if you are responsible for submitting data on behalf of your company.
Registration via the EIA Respondent Portal

**Access Instructions**

Once the registration information has been entered, and the information matches what EIA has on file for your company, EIA will send an email with instructions for accessing the Respondent Portal.

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Thank you for registering! Please check your email for further instructions.

RETURN TO RESPONDENT PORTAL
Registration via the EIA Respondent Portal

Access Instructions

Note: if the contact information entered on the registration page does not match the information provided in the invitation email, an EIA Customer Care Team member will contact you via email with instructions to obtain access to the Respondent Portal.

Thank you for providing this information. You will receive an email from no-reply@eia.gov once our Customer Care Team reviews the information provided.

If you have any questions or concerns, please contact the U.S. Energy Information Administration Customer Care Team directly via e-mail at EIAUSA@eia.gov or call 1-855-EIA-USA (1-855-342-8782) Monday through Friday, 8:00 AM – 6:00 PM ET.

RETURN TO RESPONDENT PORTAL
Registration via the EIA Respondent Portal

Access Instructions

Respondents will receive an email that confirms their registration approval with a temporary password and instructions on how to proceed. Once this email is received, return to the Respondent Portal to continue the registration process.
Registration via the EIA Respondent Portal

Access Instructions

On the Respondent Portal landing page, enter your email address as the User Name and the temporary password provided in the registration approval email.

Click Sign In to continue the registration process. If you have any problems with your password, click on the Trouble Signing in? link for instructions to reset your password.
Registration via the EIA Respondent Portal

Access Instructions

You will be required to reset your temporary password to a permanent one that meets the EIA security requirements. Click **Submit** to continue the registration process.

Once you have created a new password, you will receive a confirmation screen as follows:

Click on the **Return to Respondent Portal** link to log in once more with your User name (email address) and new password to proceed to your EIA-8A webform.
Registration via the EIA Respondent Portal with Two-Factor Authentication

Access Instructions

After your successful log in with a permanent password, EIA will send a one-time passcode via email. Enter the eight-digit passcode and click on Verify One Time Passcode to proceed to your EIA-8A webform.

Note: this passcode expires within five minutes. If you mistype the code or pass the five-minute activation period, simply click on the Resend button and check your email for a new passcode. This two-factor authentication step will be required for log in each time you access the Respondent Portal.

A note about two-factor authentication: The cybersecurity threat landscape is constantly changing and evolving. Cyber-attacks are becoming more sophisticated and require network and system defenders to deploy more advanced protection capabilities. Two-factor authentication is one such capability that decreases risk of compromise by creating additional complexity for the attacker to compromise a system.
Registration via the EIA Respondent Portal

Access Instructions

The final step to access the EIA-8A webform is to view and agree to EIA’s Warning Privacy and Security Notice. Respondents can read the Rules of Behavior by clicking on the link provided then click on the **Agree** button to proceed.
Accessing Your EIA-8A Webform

**My Dashboard**

My Dashboard is a landing page that allows the respondent to (1) navigate to forms that need to be filed, (2) view completed surveys and (3) compose and/or view any messages between the respondent and EIA.

The Dashboard will present the number of cycles needing to be filed, the number of completed surveys, and any messages to the Respondent. To begin filing EIA-8A data via the webform, click on the **To Do** button.
Accessing Your EIA-8A Webform

My Dashboard

**Note:** If you submit multiple reports, use the drop down arrow to navigate.

Clicking on the desired name populates the My Dashboard landing page allowing access to the **ToDo, Completed Surveys,** and **Message** links for each entity.
Accessing Your EIA-8A Webform

My To Do

The **To Do** tab provides a link to the webform(s) your company is required to file.

Click on the Entity ID number (hyperlinked in blue) to access the EIA-8A webform.
Best Practices Using the EIA-8A Webform

Browser

Google Chrome is the best option for optimal portal and webform performance. Other browsers will work; however, some visibility issues may occur.

Navigation

Click on the EIA logo at the top of any screen to return to the EIA Respondent Portal Dashboard at any time.

Navigation

Utilize the back button within the webform rather than your browser’s back button. This button is located at the bottom of each screen.

Print

Utilize the print button within the webform rather than your browser’s print function. This button is located at the bottom of each screen.
Advantages of using the EIA-8A Respondent Portal & Webform

### Accessibility
- Ability to access current cycles, enter data, and view previous submissions (beginning with the 2021 cycle)

### Data Validation
- Webform contains interactive edits
- Exception Dashboard allows for data review and error resolution

### Account Security
- Access to data and submissions only allowed by registered users
### Sections of the EIA-8A Form to File

The EIA-8A consists of four sections.

<table>
<thead>
<tr>
<th>Section 1</th>
<th>Respondent Identification</th>
<th>Complete Section 1 for identification. This section captures your operational status and information on sales or mergers.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 2</td>
<td>Individual Location Reports of Coal Stocks Owned by Company</td>
<td>Complete if your company owned 10,000 or more short tons of coal stocks that originated in the U.S. on December 31st of the reporting year.</td>
</tr>
<tr>
<td>Section 3</td>
<td>Coal Exported from each State</td>
<td>Complete if your company exported coal that originated in the U.S. during the reporting year.</td>
</tr>
<tr>
<td>Section 4</td>
<td>Overall Comments</td>
<td>Complete if you have any comments for EIA.</td>
</tr>
</tbody>
</table>
Section 1

Section 1 contains some pre-loaded respondent identification information.

For Question 1.2, use the drop down menu to choose whether your company was in operation, temporarily not in operation, or ceased operation.

For Question 1.3, use the radial button to choose whether your company was sold or merged during the reporting year. If your company sold or merged, provide EIA with the date and the new company’s contact information.

Click Continue to proceed.
Section 1 (continued)

For question 1.3, if your company was sold or merged during the reporting year, fill out the requested information about the new company.

Click Continue to proceed.
Filing the Webform - Section 2 Individual Location Reports of Coal Stocks Owned by Company

Section 2

Complete Section 2 if your company owned 10,000 or more short tons of coal stocks that originated in the U.S. Report the following:

- Location of coal stock (state)
- States the coal originate from
- Quantity of coal from each state
- Coal Rank
- Whether the coal was metallurgical or non-metallurgical

Use the Continue button to proceed to the next section.
If your company exported coal that originated in the U.S., enter the following information:

- State of origin
- Quantity of coal
- Total revenue of exported coal
- Coal Rank
- Whether the coal is metallurgical or non-metallurgical
- Port of export
- Final destination country

Use the ADD button to add additional rows if needed.
Filing the Webform – Section 4 Overall Comments

Section 4

Enter any overall comments pertaining to any data entered thus far, especially explanation for why operations were higher or lower than usual.

If you have questions and/or comments that require a reply, do not use this comment section. We recommend using the Message feature so that the EIA Customer Care Team can follow up directly.

Once complete, click on the Continue button to proceed to the Preview screen.
The Review section provides a summary of all information entered for the entire webform. Scroll down the page to review all data entered. Make changes if needed, then click on the Submit button.

Clicking Submit will cause the EIA-8A submission to be checked for potential errors and submitted to EIA.

Use the Print button to print a copy of the entire form.
Using the Exception Dashboard

Exception Dashboard

Once the EIA-8A form is submitted, the system will apply edit validation rules to the data. If there are flagged edits, a **Review Errors** banner will appear. Click **Close** to continue. This will return the respondent to the Review tab.

The system will provide a list of potential errors found within the data submission via the **Exception Dashboard**.
The **Exception Dashboard** provides a list of any flagged edits found in the data submission, the location, a description, and an option to enter an override comment (if allowed).

The Exception Dashboard is a scrollable banner found at the top of the page. Use the scroll bar on the far right to view all potential errors.
Using the Exception Dashboard

**EXAMPLE 1: DATA DID NOT MATCH PRIOR YEAR DATA**

In this example, the respondent entered **MD – Maryland** for the location of coal stocks. Prior year data showed Pennsylvania.

If the data entered is incorrect, simply use the drop down menu to revise the data to Pennsylvania. Click the SUBMIT button and the error will disappear.

However, in this case, the location is correct and the edit can be overridden using a comment.
EXAMPLE 1: HOW TO OVERRIDE

In some cases, the data entered are valid even though they were flagged on the exception dashboard.

To override an edit, click on the speech bubble (💬) on the exception dashboard line. Enter the reasoning for why the data are correct in the Override Comment field and click submit.

Once the override is accepted, the exception dashboard will convert the row error from pink to yellow.
Using the Exception Dashboard

**EXAMPLE 1: HOW TO OVERRIDE**

Notice the flagged error with an override comment is now yellow. The error has been addressed with a comment.

Also, notice that once the edit is cleared, the red triangle alert (⚠️) has disappeared from the data field.
EXAMPLE 2: FIXING AN ERROR THAT CANNOT BE OVERRIDEN

In the second example, the respondent has reported data that cannot be overridden. Notice that on the exception dashboard, there is no speech bubble to enter an override comment.

The respondent entered a coal rank of Bituminous in column (d) when the state of origin in column (a) shows Pennsylvania Anthracite. Simply change the rank to Anthracite and the error will disappear.
In the third example, the respondent has reported a revenue in column (c) that falls outside the expected range for Anthracite coal. This edit can be corrected, if miskeyed, or overridden if the data are valid.

Here, the respondent again clicked on the speech bubble on the exception dashboard and entered a comment to override the edit.
Form EIA-8A Submission

Review & Submit

When the submission passes all edits, the respondent will see the green banner indicating that the submission was successfully received.

At this stage, if you need to re-submit the survey with revised data, use the button under the green banner.

If you have revisions to prior years, please contact the EIA Customer Care Team for assistance.
Navigating the Respondent Portal – Completed Surveys

My Completed Surveys

Once a form is successfully submitted to EIA, the Completed Surveys tab will populate with a list of all resolved and accepted survey submissions.

Access to Surveys submitted using the Webform

Use the Completed Surveys tab to access surveys previously submitted via the webform but may require revision. Click on the blue ID hyperlink to access the webform, print and re-submit as needed.
Navigating the Respondent Portal - Messages

The Messages tab will house all correspondence between the respondent and EIA.

To send a message to EIA, click on the New Message button to compose a message.
Navigating the Respondent Portal - Messages

To send a message to EIA, click on the button

This function will initiate a secure message to EIA’s support staff. The subject and message fields are required. Respondents can use the Add button to send attachments if necessary.

Click the Send Message button and a tracking number will be provided for the successful transmission of your message.
Navigating the Respondent Portal – Contact EIA

Contact EIA

Contact information is provided for respondent support via mail, phone and email.

U.S. Energy Information Administration
U.S. Energy Information Administration
1000 Independence Ave., SW
Washington, DC 20585

855.342.4872
EIA4USA@eia.gov

Hours of operation are from 8:00 AM to 6:00 PM Eastern Time
Recap

Respondents are encouraged to register for the new EIA Respondent Portal with instructions provided in the invitation email that will be sent this week.

EIA will launch the new EIA Respondent Portal on February 1st for the calendar year 2021 collection cycle.

For any revisions to previous submissions, please contact the EIA Customer Care Team for assistance:
Email: EIA4USA@eia.gov
Phone: 1-855-EIA-4USA (1-855-342-4872)
Benefits of Using the Webform

✓ The new webform incorporates more data validation edits allowing respondents to submit more accurate data with less follow up

✓ The webform is a more secure method of transmission and ensures that only registered users submit data for your company

✓ Respondents can easily access and revise data in one central location

✓ Respondents can communicate securely and directly with EIA
Annual Survey of Coal Stocks & Coal Exports (EIA-8A) Information Session

Thank you for joining our Information Session today!

If you have further questions, please contact us at:

• Email: EIA4USA@eia.gov

• Phone: 1-855-EIA-4USA (1-855-342-4872)

• Link to the new EIA Respondent Portal: https://survey.eia.gov