CDX Pesticide Submissions Portal (PSP) Registration User Guide

Environmental Protection Agency

Office of Pesticide Programs

Table of Contents

List of Exhibits

1 Introduction

The Central Data Exchange (CDX) is a web-based system used for various electronic environmental data submissions to the United States Environmental Protection Agency (EPA). CDX allows users submitting data to EPA to register for the specific program of interest. The CDX system also allows for several offices within EPA to use a common framework where a user can access several different flows to satisfy reporting requirements across multiple offices. More information about CDX is available at www.epa.gov/cdx.

1.1 Purpose

The purpose of this document is to walk through the registration and user profile management processes in CDX, specifically for Pesticide Submission Portal (PSP) workflow submissions. The CDX modernization effort improves the user experience through an updated user interface, as well as streamlined user registration processes for CDX web users, including the migration of user accounts and profiles for users who currently use the system. This document will assist new CDX users register with the CDX system as well as reacquaint existing users with new system processes and registering for PSP.

1.2 Topics Covered

This document will cover the registration process and the MyCDX profile. The sections are described below:

- **Section 2** lists the system requirements. This section describes what a user needs to access and interact with the system.

- **Section 3** outlines the main CDX navigation. This section guides the user through the CDX screens that do not require a user account.

- **Section 4** describes the CDX core registration process. This section introduces a user to the registration process.

- **Section 5** describes the additional verification process that takes place for some roles.

- **Section 6** details managing user and organization information within CDX.

- **Section 7** describes how to manage program services and add EPA OPP Company Numbers.

- **Section 8** explains the role sponsorship process.

1.3 Application Support

Help can be accessed by using the following options:

- **By Telephone:**
  Person-to-person telephone support is available from 8:00 am to 6:00 pm eastern standard time/eastern daylight time (EST/EDT). Call the CDX Help Desk's toll-free line at 888-890-1995 or 970-494-5500 for callers from Puerto Rico and Guam.

- **By Email:**

  Send an email to Technical Support at helpdesk@epacdx.net with "Technical Support" in the 'Subject' line.

- **By Chat:**

  Click the 'Chat with the CDX Help Desk' link on the 'Contact Us' page to generate a web form to enter information regarding your help request.

- **By Contact Form:**

  Enter information in the text fields under the 'Contact Form' section of the 'Contact Us' page.

- **By Website:**

  Users can contact the CDX team from the 'Contact Us' screen at https://cdx.epa.gov/Contact and read the help section at https://cdx.epa.gov/Help.

2   System Requirements

To use CDX, the following are required:

- An e-mail account
- JavaScript enabled web browser
- Internet access
- Adobe Acrobat Reader 5.0 or higher

2.1   Supported Browsers

For optimal performance, it is recommended that you use Google Chrome to access the PSP application. However, the following browsers are supported:

- Google Chrome

  Go to the following link to download:

  http://www.google.com/chrome

- Internet Explorer 9 or above (best in Internet Explorer 11)

  Go to the following link to download:

  http://windows.microsoft.com/en-US/internet-explorer/downloads/ie

- Mozilla Firefox 3.5 or above

  Go to the following link to download:

  http://www.mozilla.com/en-US/firefox/all-older.html

- Safari 4 or above

  Go to the following link to download:

  http://support.apple.com/kb/dl877

2.2   Screen Resolution

Screen resolution should be set to 1024 x 768 or greater.

3 CDX Main Navigation

The following section provides an overview of the pages that are accessible upon first navigating to the CDX Homepage before beginning the registration process.

3.1 Overview

CDX is an application used by EPA programs and various stakeholders to manage environmental data transmitted to EPA to meet EPA reporting requirements. As part of the CDX system, the user registration component is used to facilitate user access to a program. Within the user registration component, program offices have the ability to define the roles and information required by new users to complete the registration process. Based on the program service and role combinations, each program has different information that a user must provide. CDX captures the requirements for each program service and role and prompts the user for only the information required. Some roles do not require any additional information, whereas others require identity proofing and/or additional information processing. The following sections will walk through how a user will register for different program services.

3.2 CDX Homepage

The CDX homepage is the landing screen from which you have the ability to access and interact with CDX. The CDX home screen can be accessed by the following link: https://cdx.epa.gov, and provides the user with the following features:

- **Log In:** If you already have a CDX account, you may log into the system by entering your user identification (ID) and password information and clicking the 'Log In' button located on the right-hand side of the screen.

- **Registration:** If you do not have a CDX account, click the 'Register with CDX' button to begin the registration process outlined later in this section.

- **Welcome Announcement:** This text area provides welcome text that is visible to all users who visit CDX.

- **Important Alerts:** The alerts in the 'Notices' box that appear below the 'Welcome Announcement' provide you with system or program-specific information. The 'Notices' box will only appear if there are any alerts regarding CDX.

- **Warning Notice and Privacy Policy:** The 'Warning Notice and Privacy Policy' statements are displayed on the CDX homepage providing you with a list of the terms of use for the CDX system, whether you decide to log into, or register with, the system.

Exhibit 3-1 shows a screen capture of the 'CDX Homepage' screen (Scroll 1):

Exhibit 3-1: CDX Homepage Screen (Scroll 1)

Exhibit 3-2 shows a screen capture of the 'CDX Homepage' screen (Scroll 2):

Welcome

Welcome to the Environmental Protection Agency (EPA) Central Data Exchange (CDX) - the Agency's electronic reporting site. The Central Data Exchange concept has been defined as a central point which supplements EPA reporting systems by performing new and existing functions for receiving legally acceptable data in various formats, including consolidated and integrated data.

Warning Notice and Privacy Policy

Warning Notice

In proceeding and accessing U.S. Government information and information systems, you acknowledge that you fully understand and consent to all of the following:

1. you are accessing U.S. Government information and information systems that are provided for official U.S. Government purposes only;
2. unauthorized access to or unauthorized use of U.S. Government information or information systems is subject to criminal, civil, administrative, or other lawful action;
3. the term U.S. Government information system includes systems operated on behalf of the U.S. Government;
4. you have no reasonable expectation of privacy regarding any communications or information used, transmitted, or stored on U.S. Government information systems;
5. at any time, the U.S. Government may for any lawful government purpose, without notice, monitor, intercept, search, and seize any authorized or unauthorized communication to or from U.S. Government information systems or information used or stored on U.S. Government information systems;
6. at any time, the U.S. Government may for any lawful government purpose, search and seize any authorized or unauthorized device, to include non-U.S. Government owned devices, that stores U.S. Government information;
7. any communications or information used, transmitted, or stored on U.S. Government information systems may be used or disclosed for any lawful government purpose, including but not limited to, administrative purposes, penetration testing, communication security monitoring, personnel misconduct measures, law enforcement, and counterintelligence inquiries; and
8. you may not process or store classified national security information on this computer system.

Privacy Statement

EPA will use the personal identifying information which you provide for the expressed purpose of registration to the Central Data Exchange site and for updating and correcting information in internal EPA databases as necessary. The Agency will not make this information available for other purposes unless required by law. EPA does not sell or otherwise transfer personal information to an outside third party. [Federal Register: March 18, 2002 (Volume 67, Number 52)][Page 12010-12013].

Exhibit 3-2: CDX Homepage Screen (Scroll 2)

3.2.1 About CDX

From the CDX homepage, you can access the 'About CDX' screen from the tab labeled 'About' at the top of the screen. The 'About CDX' screen provides general information about the CDX system requirements and procedures that site users should be aware of concerning regulation, user information, and system information. Tabs are available across the top part of the CDX homepage for a user to read information regarding specific CDX topics.

Exhibit 3-3 shows a screen capture of the 'About CDX' screen (Scroll 1):

Exhibit 3-3: About CDX Screen (Scroll 1)

Exhibit 3-4 shows a screen capture of the 'About CDX' screen (Scroll 2):

(2) Establish and document a unique correlation between the registrant and the code or device that will constitute or create the electronic signature of the registrant as a submitter;

(3) Require that the registrant sign on paper, or in such other manner or medium as the Administrator in his or her discretion may determine as appropriate for a category of electronic reports, an electronic signature agreement specifying at a minimum that the registrant agrees to:
    (i) Protect the electronic signature from unauthorized use, and follow any procedures specified by the agency for this purpose;
    (ii) Be held as legally bound, obligated, or responsible by use of the assigned electronic signature as by hand-written signature;
    (iii) Where the signature method is based on a secret code or key, maintain the confidentiality of each component of the electronic signature;
    (iv) In any case, never to delegate the use of the electronic signature, or in any other way intentionally provide access to its use, to any other individual for any reason; and
    (v) Report to the entity specified in the electronic signature agreement, within twenty-four hours of discovery, any evidence of the loss, theft, or other compromise of any component of an electronic signature;
(4) Provide for the automatic and immediate revocation of an electronic signature in the event of:
    (i) Any actual or apparent violation of the electronic signature agreement;
    (ii) Any evidence that the signature has been compromised, whether or not this is reported by the registrant to whom the signature was issued; or
    (iii) Notification from an entity that the registrant is no longer authorized by the entity to submit electronic documents on its behalf;
(5) Require that the registrant renew his or her electronic signature agreement at least once every two years, or upon request by EPA, with a renewal agreement that:
    (i) Complies with the provisions listed in paragraph (d)(3) of this section; and
    (ii) Includes the registrant's certification that he or she has complied with provisions listed in paragraph (d)(3) of this section since issuance of the signature, and that all reports submitted under the signature since the electronic signature agreement was last signed were reviewed and submitted by the registrant;
(6) Provide for a registrant who is surrendering his or her electronic signature to certify that he or she has complied with provisions listed in paragraph (d)(3) of this section since issuance of the signature and that all reports submitted under the signature since the electronic signature agreement was last signed were reviewed and submitted by the registrant.

Exhibit 3-4: About CDX Screen (Scroll 2)

3.2.2   Recent Announcements

From the CDX homepage, you can access the 'Recent Announcements' screen from the tab labeled 'Recent Announcements' at the top of the screen. This page provides an extended list of announcements, both current and archived. The most recent announcements are displayed as important alerts on the homepage. If an alert on the homepage is too long, it will display in a teaser format with a hyperlink to view more details. Upon clicking the hyperlink on the homepage, the user will be directed to the 'Recent Announcements' screen to view the announcement in its entirety. An 'Older announcements' link displays at the bottom of a set of announcements to display announcements from the past six months.

Exhibit 3-5 shows a screen capture of the 'Recent Announcements' screen:
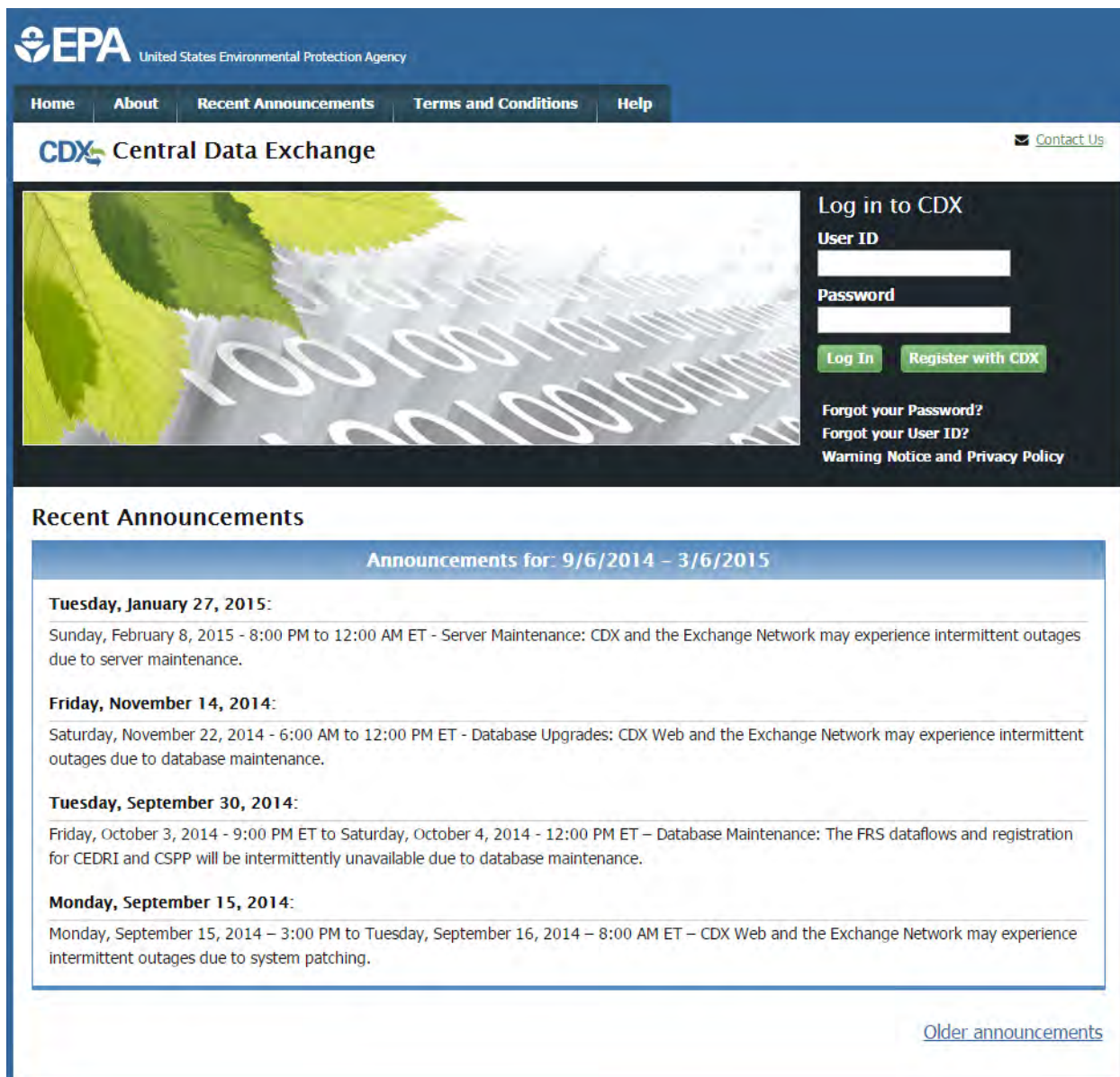
Exhibit 3-5: Recent Announcements Screen

3.2.3 Terms and Conditions

From the CDX homepage, you can access the 'Terms and Conditions' screen from the tab labeled 'Terms and Conditions' at the top of the screen. This page provides the terms and conditions for use of the application. This includes EPA's privacy statement, warning notice, and user credential notices. Any user who registers for or has a CDX account is legally bound by these conditions.

Exhibit 3-6 shows a screen capture of the 'Terms and Conditions' screen (Scroll 1):

Exhibit 3-6: Terms and Conditions Screen (Scroll 1)

Exhibit 3-7 shows a screen capture of the 'Terms and Conditions' screen (Scroll 2):

5. at any time, the U.S. Government may for any lawful government purpose, without notice, monitor, intercept, search, and seize any authorized or unauthorized communication to or from U.S. Government information systems or information used or stored on U.S. Government information systems;

6. at any time, the U.S. Government may for any lawful government purpose, search and seize any authorized or unauthorized device, to include non-U.S. Government owned devices, that stores U.S. Government information;

7. any communications or information used, transmitted, or stored on U.S. Government information systems may be used or disclosed for any lawful government purpose, including but not limited to, administrative purposes, penetration testing, communication security monitoring, personnel misconduct measures, law enforcement, and counterintelligence inquiries; and

8. you may not process or store classified national security information on this computer system.

Privacy Statement

EPA will use the personal identifying information which you provide for the expressed purpose of registration to the Central Data Exchange site and for updating and correcting information in internal EPA databases as necessary. The Agency will not make this information available for other purposes unless required by law. EPA does not sell or otherwise transfer personal information to an outside third party. [Federal Register: March 18, 2002 (Volume 67, Number 52)][Page 12010-12013].

Choosing a CDX Password

For CDX registration purposes, I agree to select a password which will not be easily guessed (e.g., my name, my children's names, birthdays, etc.). Passwords must be a minimum of 8 alpha-numeric characters (no spaces or special characters) and contain at least 1 of each of the following:

- uppercase character
- lowercase character
- number

Passwords may not begin with a number nor contain the word "password" nor contain your User Name.

Protecting my CDX Password

I agree to protect my CDX password.

I will not divulge my password to any other individual; I will not store it in an unprotected location; and I will not allow it to be written into computer scripts to achieve automated login.

Limited CDX Software Distribution

Any distribution of software provided by the Environmental Protection Agency's Central Data Exchange shall be handled according to any defined license practices.

Exhibit 3-7: Terms and Conditions Screen (Scroll 2)

Exhibit 3-8 shows a screen capture of the 'Terms and Conditions' screen (Scroll 3):

Protecting my CDX Password

I agree to protect my CDX password.

I will not divulge my password to any other individual; I will not store it in an unprotected location; and I will not allow it to be written into computer scripts to achieve automated login.

Limited CDX Software Distribution

Any distribution of software provided by the Environmental Protection Agency's Central Data Exchange shall be handled according to any defined license practices.

CDX provides tools which contains FIPS-validated RSA BSAFE Crypto-J which is classified under Export Commodity Classification Number (ECCN) 5D002 "Encryption Sofware" referenced under CCATS G059799. This product is eligible for license exception ENC under Sections 740.17 (A) and (B) (2) of the Export Administration Regulations (EAR). The exportation of this item classified by the Bureau of Industry and Security (BIS) as 5D002 "Unrestricted" to foreign subsidiaries of US companies is permitted under this license exception ("ENC "Encryption"). This license exception does not apply to the embargoed nations of Cuba, Iran, North Korea, Sudan and Syria or any parties found on the various government denial lists including the Department of Commerce Denied Parties List. For additional information and guidance regarding your use of this product, please refer to the United States' standard regulations for encryption at http://www.access.gpo.gov/bis/ear/pdf/740.pdf

Actions to take if my CDX Account has been Compromised

If I have determined that my CDX account has become compromised, I agree to contact the CDX Technical Support staff at 888-890-1995 or (970) 494-5500 for International callers as soon as possible.

Terminating my CDX Account

I agree to notify CDX within ten working days if my duties change and I no longer need to interact with the CDX on behalf of my organization. I agree to make this notification via either the CDX web interface or by notifying the CDX Technical Support staff at 888-890-1995 or (970) 494-5500 for International callers. This notification will allow CDX to deactivate my account and protect it from potential abuse by others.

Exhibit 3-8: Terms and Conditions Screen (Scroll 3)

3.2.4   Help

This page provides multiple options for users to contact the CDX help desk. Users can contact the help desk by phone or email. The contact information is for both domestic and international end users (see Exhibit 3-9). Users also have the ability to send a message to EPA help desk via the contact form. You may access the contact form by clicking the 'Contact Us' link above the login section (see Exhibit 3-10 and Exhibit 3-11).

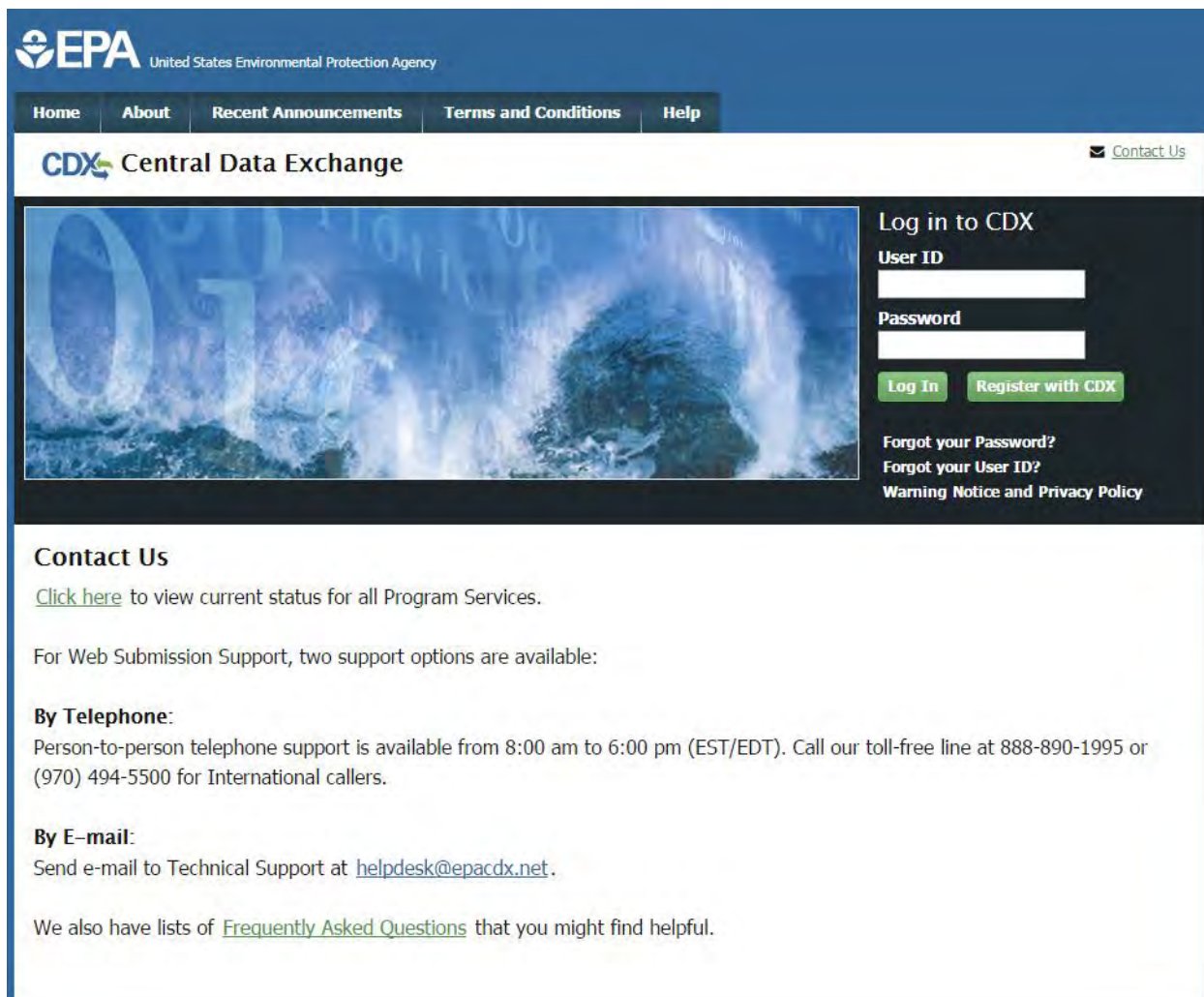Exhibit 3-9 shows a screen capture of the 'Help' screen:

Exhibit 3-9: Help Screen

Exhibit 3-10 shows a screen capture of the 'Contact Us' screen (Scroll 1):

Exhibit 3-10: Contact Us (Scroll 1)

Exhibit 3-11 shows a screen capture of the 'Contact Us' screen (Scroll 2):

Send e-mail to Technical Support at helpdesk@epacdx.net.

By Chat:

Chat with the CDX Help Desk to answer your questions. Exit

Contact Form

EPA welcomes your comments, especially comments on how we can improve our Web site. We strive to respond to every comment with an answer or an appropriate referral as quickly as possible. Most comments will be responded to within 2-3 business days.

Please help us answer your request by including a correct e-mail address. We have answered thousands of requests, but we receive many messages that we can't respond to because of incorrect email addresses. Also, if you are referring to a specific page within the EPA CDX web site, please include a URL or title for the page. If your browser doesn't support forms, you can e-mail your comment to us at helpdesk@epacdx.net.

Name *

Organization

Email *

Comments *

Submit Comment

Exhibit 3-11: Contact Us (Scroll 2)

4 CDX Core Registration for Primary Submitters

To begin the registration process, click the 'Register with CDX' button that displays in the CDX header on the main CDX navigation screens as listed in **Section 3**.

4.1 PSP User Roles

PSP supports two roles: Primary Submitter and Submitter. Primary Submitters can sponsor Submitters to submit on their behalf. Submitters must first be sponsored by a Primary Submitter before they can register through CDX. Please refer to **Section 4.1.1** below for more information about the different PSP roles. For more information about role sponsorship please see **Section 8**.

4.1.1 Primary Submitter

Primary Submitters serve as the primary point of contact for a company. Primary Submitters have the following attributes:

- Can sponsor Submitters to submit on their behalf
- Can revoke a Submitter's access to the PSP application
- Can see all packages created for their company. However, to view the details of these packages, they must obtain the passphrase used to encrypt the package. **Note:** A passphrase is needed to view all created packages. Neither Primary Submitters nor Submitters may view the details of a package without the package's passphrase.
- Can prepare and submit packages on behalf of their organization
- There can be multiple Primary Submitters for a company
- Can add EPA OPP Company Numbers and submit for multiple companies.

4.1.2 Submitter

Submitters have the following attributes:

- Must be sponsored by a Primary Submitter
- Can only see the packages they created
- Can prepare and submit packages on behalf of their organization
- There can be multiple Submitters for a company

4.2 Terms and Conditions

After clicking the 'Register with CDX' button, the CDX 'Terms and Conditions' screen (see Exhibit 4-1) displays the following terms and conditions:

- Acceptance of warning and privacy policies
- Choosing a complex password

- Protecting your password
- Notifying CDX of possible misuse of account
- Limiting distribution of CDX software
- Agreement to notify CDX of changes in duties

You can accept the terms and conditions by selecting the 'I Accept' radio button and clicking the 'Proceed' button. You can also cancel the registration by selecting the 'I Decline' radio button and clicking the 'Proceed' button or by clicking the 'Cancel' button. Once you have accepted the registration agreement, the application redirects you to proceed with the registration process. If you do not agree to the terms and conditions, you will not be able to continue with the registration process.

Exhibit 4-1 shows a screen capture of the CDX 'Terms and Conditions' screen:
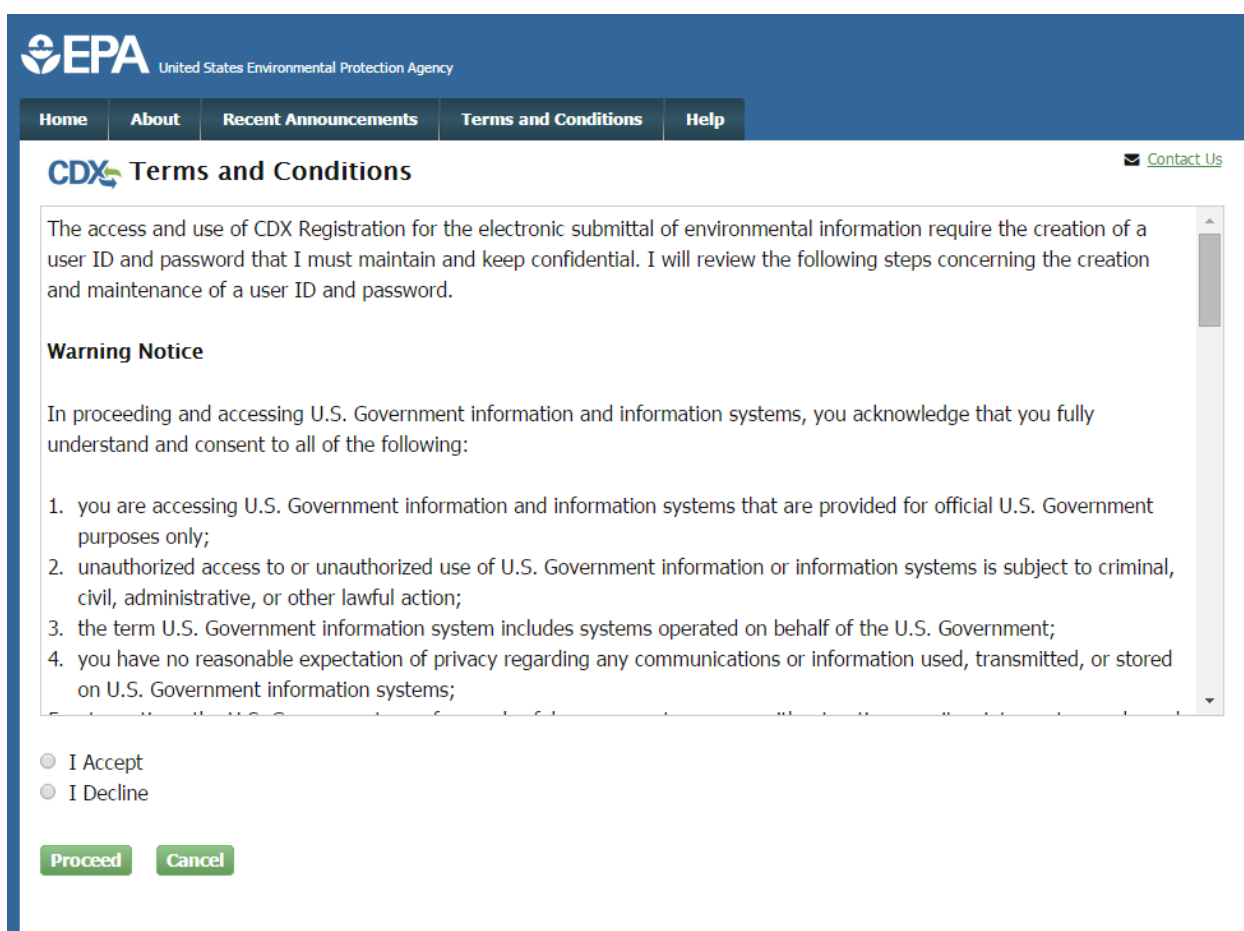
Exhibit 4-1: CDX Terms and Conditions Screen

Navigation: Click the 'I Accept' radio button and click 'Proceed'

4.3 Program Service

The 'Program Service' screen is the first step in the registration process and is indicated in the breadcrumb bar at the top of the page.

The 'Program Service' screen displays a list of available program services from which you can choose (see

Exhibit **4-2**). You may filter the open program service list by typing the program service name or other related program metadata in the text bar (see Exhibit 4-3). You can select a program by clicking the program name (e.g. 'PSP: Pesticide Submission Portal'). The selection on this page will determine the information you must enter on subsequent pages.

The search component provides an enhanced search capability that instantly displays search results as search criteria and keywords are entered by the user. For example, typing the word 'psp' will display 'PSP: Pesticide Submission Portal' in the search results. The system will take you to the 'Role Access' screen once you select the program service.

Exhibit 4-2 shows a screen capture of the 'Program Service' screen:

Exhibit 4-2: Program Service Screen

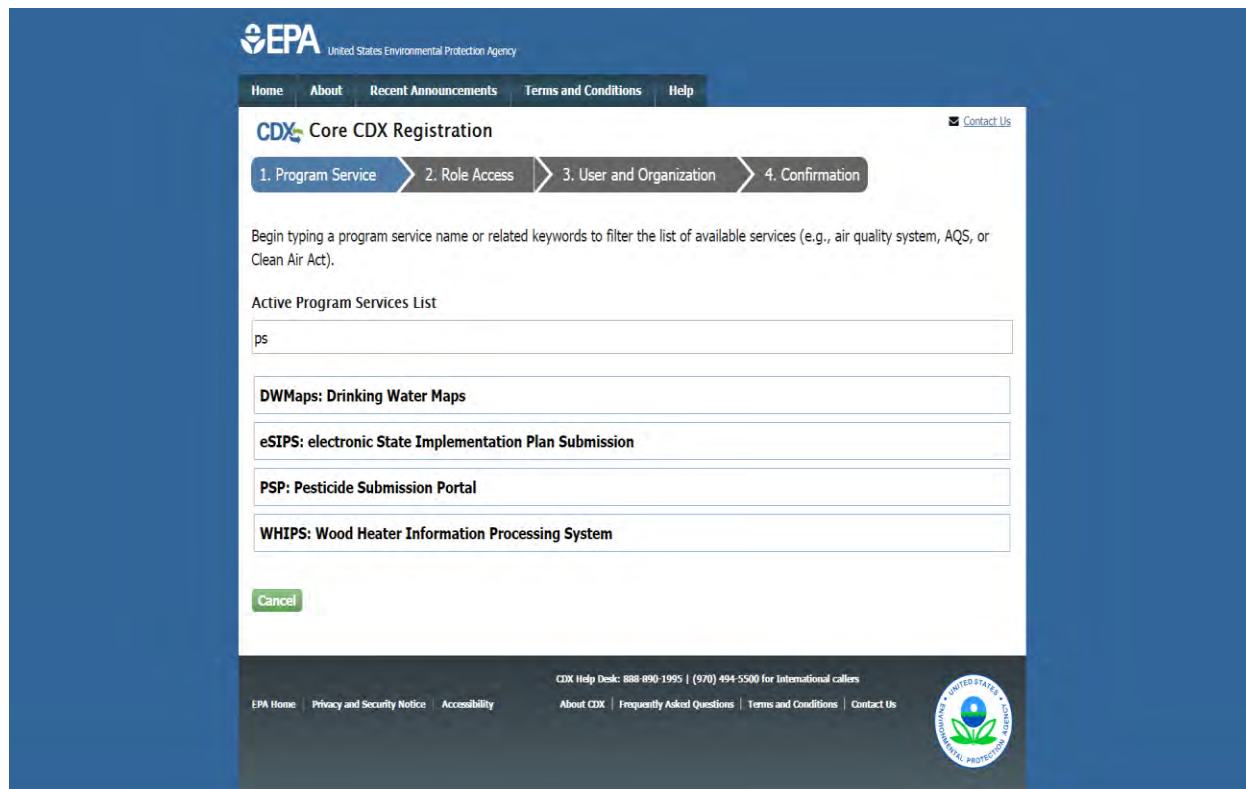Exhibit 4-3 shows a screen capture of a filtered view of the 'Program Service' screen:

Exhibit 4-3: Program Service Screen (Filtered View)

Navigation: Enter 'PSP' in the 'Active Program Services List' field and select 'PSP: Pesticide Submission Portal'

4.4 Role Access (Primary Submitter)

The 'Role Access' screen is the second step in the registration process. It will be highlighted in the top breadcrumb bar. Completed steps are indicated with a checkmark. You are also able to navigate back to the first step by clicking the 'Program Service' step in the top breadcrumb bar.

The CDX application allows programs to define user roles that can be selected during registration. After selecting 'PSP: Pesticide Submission Portal' on the 'Program Service' page, the 'Role Access' screen will appear and will allow you to register for the Primary Submitter role.

Note: After selecting the 'Primary Submitter' role, a 'Company Number' field will appear. Enter the EPA Office of Pesticide Programs (OPP) Company Number for the company you will be submitting for. If you do not know the EPA OPP Company Number for your company, please follow this link for instructions on how to obtain a Company Number → http://www2.epa.gov/pesticide-registration/pesticide-registration-manual-how-obtain-company-number-and-register-official .

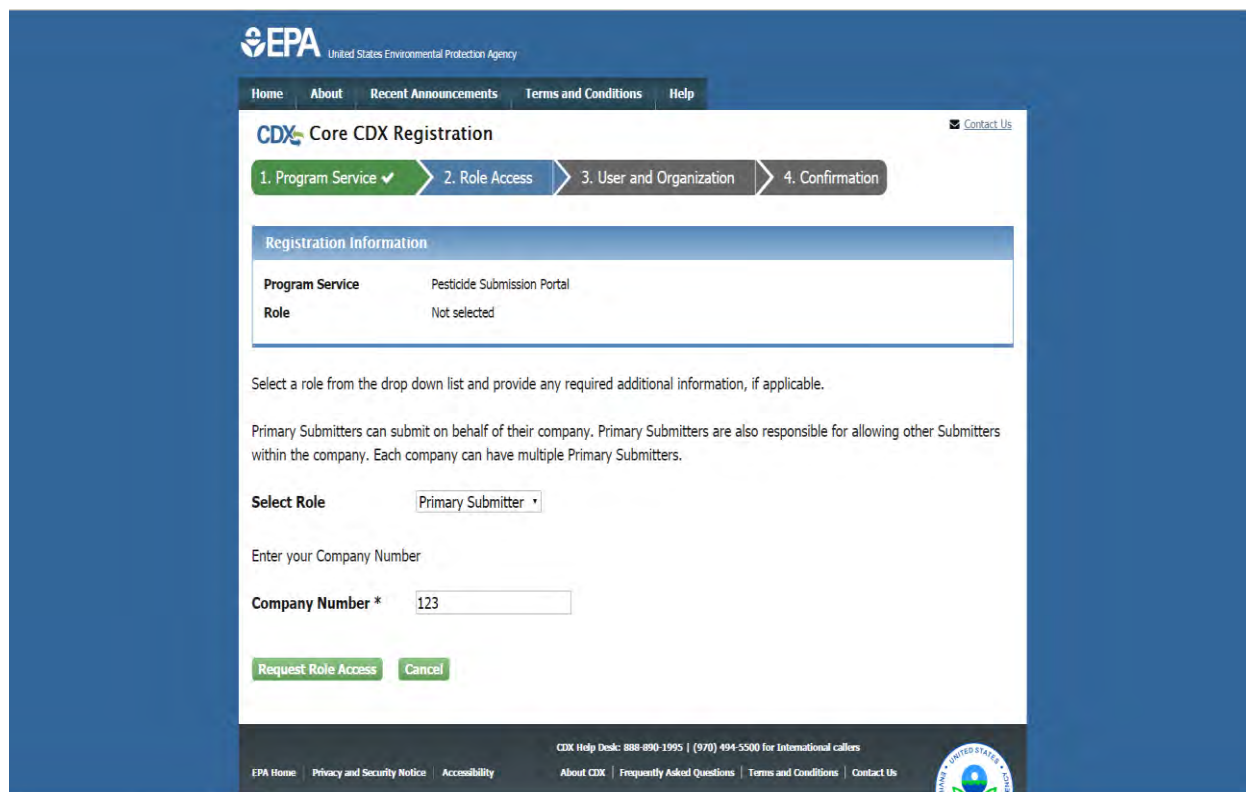Exhibit 4-4 shows a screen capture of the 'Role Access' screen.

Exhibit 4-4: Role Access Screen

Navigation: Enter your EPA OPP Company Number and click the 'Request Role Access' button.

4.4.1   User and Organization Information

The 'User and Organization' screen is the third step in the registration process. It will be highlighted in blue on the top breadcrumb bar. Completed steps are indicated with a checkmark. The 'Registration Information' summary section is at the top and is updated with the selections being made. You will also be able to navigate back to the previous steps by clicking the corresponding step.

Both the user and organization information are captured on the same screen. The information entered in this portion of the registration process is used to support account validation and establish levels of assurance.

All new CDX users will be required to activate their account after these registration steps by following the instructions sent to the email address provided during the registration process for their specified organization.

Since additional identity proofing is required, you will be prompted to either use LexisNexis identity validation or sign a paper Electronic Signature Agreement (ESA). This prompt will occur after your initial login to the system.

4.4.2   Part 1: User Information

The 'User Information' section collects the following information (see Exhibit 4-5):

- User ID (required)
- Title (required)
- First Name (required)
- Middle Initial
- Last Name (required)
- Suffix
- Password (required)
- Re-type Password (required)
- Security Question 1 (required)
- Security Answer 1 (required)
- Security Question 2 (required)
- Security Answer 2 (required)
- Security Question 3 (required)
- Security Answer 3 (required)

Please note that the user ID and password information may be requested for re-authentication with features throughout CDX including any submission processes within PSP. The 'Security Question' and 'Security Answer' fields are also used for re-authentication in the event you forget your password and need to reset it.

When creating a user ID, it must abide by the following rules:

- Must be at least 8 characters
- No special characters may be used with the exception of '_,' '@,' and '.'

When creating a password, it must abide by the following rules:

- Must be at least 8 characters
- Must be no more than 15 characters
- Must contain one uppercase letter, one lowercase letter, and one number
- May not begin with a number
- May not be the same as your user ID
- May not contain the word 'Password'
- May not contain any special characters or spaces
- Must be changed every 90 days

Exhibit 4-5 shows a screen capture of the 'User and Organization' screen.

Exhibit 4-5: User and Organization Screen (Scroll 1)

Exhibit 4-6: User and Organization Screen (Scroll 2)

4.4.3   Part 2: Organization Information

The CDX system requires you to search for your organization before you are able to create a new organization. You are first asked to do a simple search (see Exhibit 4-7) by entering the 'Organization Name' or the 'Organization ID.' **Important:** The organization ID is **not** your EPA OPP Company Number. The organization ID field is used soley by CDX to identify different organizations. If you are unsure of your organization ID, search by your company's name.
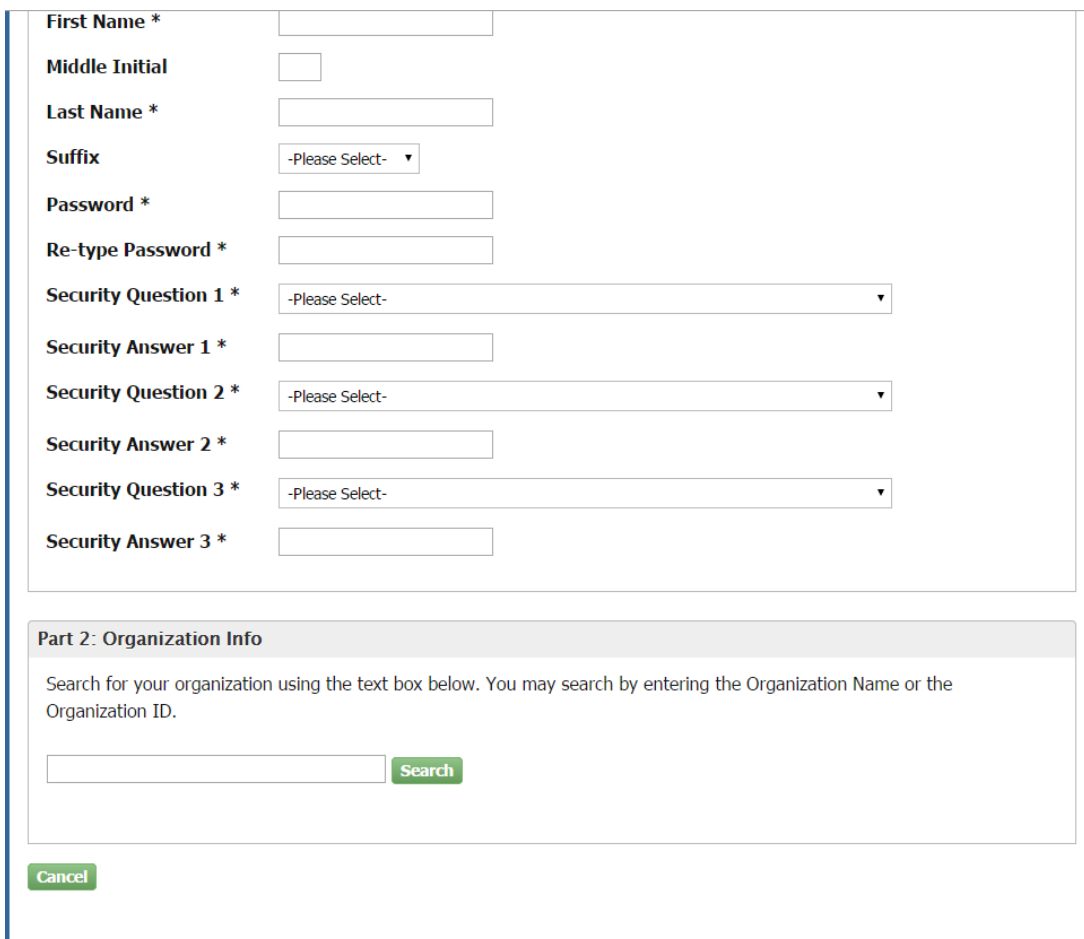
Partial search terms can be entered. The matching search results will be returned in a table displaying the 'Organization ID,' 'Organization Name,' 'Address,' 'City,' 'State,' and 'ZIP Code' (see Exhibit 4-8). If the simple search returns too many results, you may use the advanced search option (see Exhibit 4-9). Once the search is executed, the search results will display a list of matching valid organizations from which you can select. Click the corresponding Organization ID to add that organization to the 'User and Organization' screen.

Once an organization has been selected or created, you will be required to enter an email address and phone number, with the option of entering a phone number extension or fax number (see Exhibit 4-11 and Exhibit 4-12).

Search results will only display organizations that have been previously verified by a Registration Maintenance Account Manager (RMAM), LexisNexis, or a help desk user. Organizations that have not been verified can be searched for by using the organization ID.

The first organization a user adds will be set as the primary organization. The primary organization is important because it indicates the user's primary email address in CDX.

Exhibit 4-7 shows a screen capture of the 'Organization Information' section of the 'User and Organization' screen:

First Name *	
Middle Initial	
Last Name *	
Suffix	-Please Select- ▼
Password *	
Re-type Password *	
Security Question 1 *	-Please Select- ▼
Security Answer 1 *	
Security Question 2 *	-Please Select- ▼
Security Answer 2 *	
Security Question 3 *	-Please Select- ▼
Security Answer 3 *	

Part 2: Organization Info

Search for your organization using the text box below. You may search by entering the Organization Name or the Organization ID.

[_____] Search

Cancel

Exhibit 4-7: User and Organization Screen - Organization Information

Navigation: Type a search term and click the 'Search' button to search for an organization.

Exhibit 4-8 shows a screen capture of the search results of the 'User and Organization' screen:

Part 2: Organization Info

Search for your organization using the text box below. You may search by entering the Organization Name or the Organization ID.

EPA   [Search]

Organization ID	Organization Name	Address	City	State	ZIP Code
15305	EPA AIRLINE	109 TW ALEXANDER DR	RTP	NC	27711
15404	EPA 2	1200 PENN AVE	WASHINGTON	DC	20460
17067	EPA	109 TW ALEXANDER DR	RTP	NC	27711
17221	EPA	1310 L ST NW	WASHINGTON	DC	20785
15536	EPA'S 2ND AIRLINE	109 TW ALEXANDER DRIVE	RTP	NC	27711
17361	EPA Region 6	1445 Ross Avenue	Dallas	TX	75202
15867	U.S. EPA	1200 PENNSYLVANIA AVE NW	WASHINGTON	DC	20460
20264	EPA	1234 Simba Ln	Zambia	N/A	333333
22447	EPA Region 10	1200 6th Avenue	Seattle	WA	98101
17381	EPA Test Company 1	123456 Test St.	Fairfax	VA	22033
16378	EPA	123 MAIN ST	MAIN	MD	11111
16472	EPA	2000 TRAVERWOOD DRIVE	ANN ARBOR	MI	48105
16817	EPA	1310 L ST. NW	WASHINGTON	DC	20005

Can't find your organization? Use advanced search or request that we add your organization.

[Cancel]

Exhibit 4-8: User and Organization Screen – Search Results

Navigation: Click a blue organization link under the 'Organization ID' section to select that organization. If you do not see your organization, you can proceed to **Section 4.4.3.1** or **Section 4.4.3.2** below.

4.4.3.1   Organization Advanced Search

When an organization does not appear in the basic search results, you have the option to perform an advanced search for a valid organization. Click the 'Use advanced search' hyperlink below the existing organization search results to perform a search with the following criteria (see Exhibit 4-9):

- Organization ID
- Organization Name
- Country

- Mailing Address
- Mailing Address 2
- City
- State
- ZIP/Postal Code

After entering in at least two of the listed search criteria, click the 'Search' button to return a list of results.

Exhibit 4-9 shows a screen capture of the 'User and Organization – Advanced Search' screen (Part 1):

Exhibit 4-9: User and Organization Screen – Advanced Search (Part 1)

Navigation: Enter search terms in the fields on this screen to perform an advanced search for your organization.

Once the search is executed, the search results will display a list of matching valid organizations from which you can select. Click the corresponding Organization ID to add that organization to the 'User and Organization' screen.

Exhibit 4-10 shows a screen capture of the 'User and Organization– Advanced Search' screen (Part 2):

Part 2: Organization Info

Search for your organization using the search criteria below.

Organization ID	
Organization Name	EPA
Country	UNITED STATES ▼
Mailing Address	
Mailing Address 2	
City	
State	▼
ZIP/Postal Code	

Wrong organization information? Back to Search or request that we add your organization.

[Search]

Organization ID	Organization Name	Address	City	State	ZIP Code
15305	EPA AIRLINE	109 TW ALEXANDER DR	RTP	NC	27711
15404	EPA 2	1200 PENN AVE	WASHINGTON	DC	20460
17067	EPA	109 TW ALEXANDER DR	RTP	NC	27711
17221	EPA	1310 L ST NW	WASHINGTON	DC	20785
15536	EPA'S 2ND AIRLINE	109 TW ALEXANDER DRIVE	RTP	NC	27711
17361	EPA Region 6	1445 Ross Avenue	Dallas	TX	75202
15867	U.S. EPA	1200 PENNSYLVANIA AVE NW	WASHINGTON	DC	20460
22447	EPA Region 10	1200 6th Avenue	Seattle	WA	98101
17381	EPA Test Company 1	123456 Test St.	Fairfax	VA	22033
16378	EPA	123 MAIN ST	MAIN	MD	11111
16472	EPA	2000 TRAVERWOOD DRIVE	ANN ARBOR	MI	48105
16817	EPA	1310 L ST. NW	WASHINGTON	DC	20005

[Cancel]

Exhibit 4-10: User and Organization Screen – Advanced Search (Part 2)

Navigation: Select an organization by clicking the blue organization ID link in the 'Organization ID' column.

Once an organization has been selected or created, you will be required to enter an email address and phone number, with the option of entering a phone number extension and/or a fax number. After entering in the required information, click the 'Submit Request for Access' button to navigate to the 'Confirmation' screen:

Exhibit 4-11 shows a screen capture of the 'User and Organization– Advanced Search' screen (Part 3):

Exhibit 4-11: User and Organization Screen – Advanced Search (Part 3)

Navigation: Enter an email address and phone number in the required fields.

4.4.3.2   Request to Add Organization

If an organization does not appear in the basic or advanced search results, you have the option to request the addition of another organization. Both international and domestic organizations can be added. The fields will differ based on the location of the organization that you request to add.

If you no longer wish to add an organization, click the 'Back to Search Results' link to navigate back to the search results.

This feature will collect the following information for U.S. organizations (see Exhibit 4-12):

- Organization Name (required)
- Country (required)
- Mailing Address (required)
- Mailing Address 2
- City (required)
- State (required)
- ZIP/Postal Code (required)
- Email (required)
- Re-enter Email (required)
- Phone Number (required)
- Phone Number Ext
- Fax Number

This feature will collect the following information for Canadian organizations:

- Organization Name (required)
- Country (required)
- Mailing Address (required)
- Mailing Address 2
- City (required)
- Province (required)
- ZIP/Postal Code (required)
- Email (required)
- Re-enter Email (required)
- Phone Number (required)
- Phone Number Ext
- Fax Number
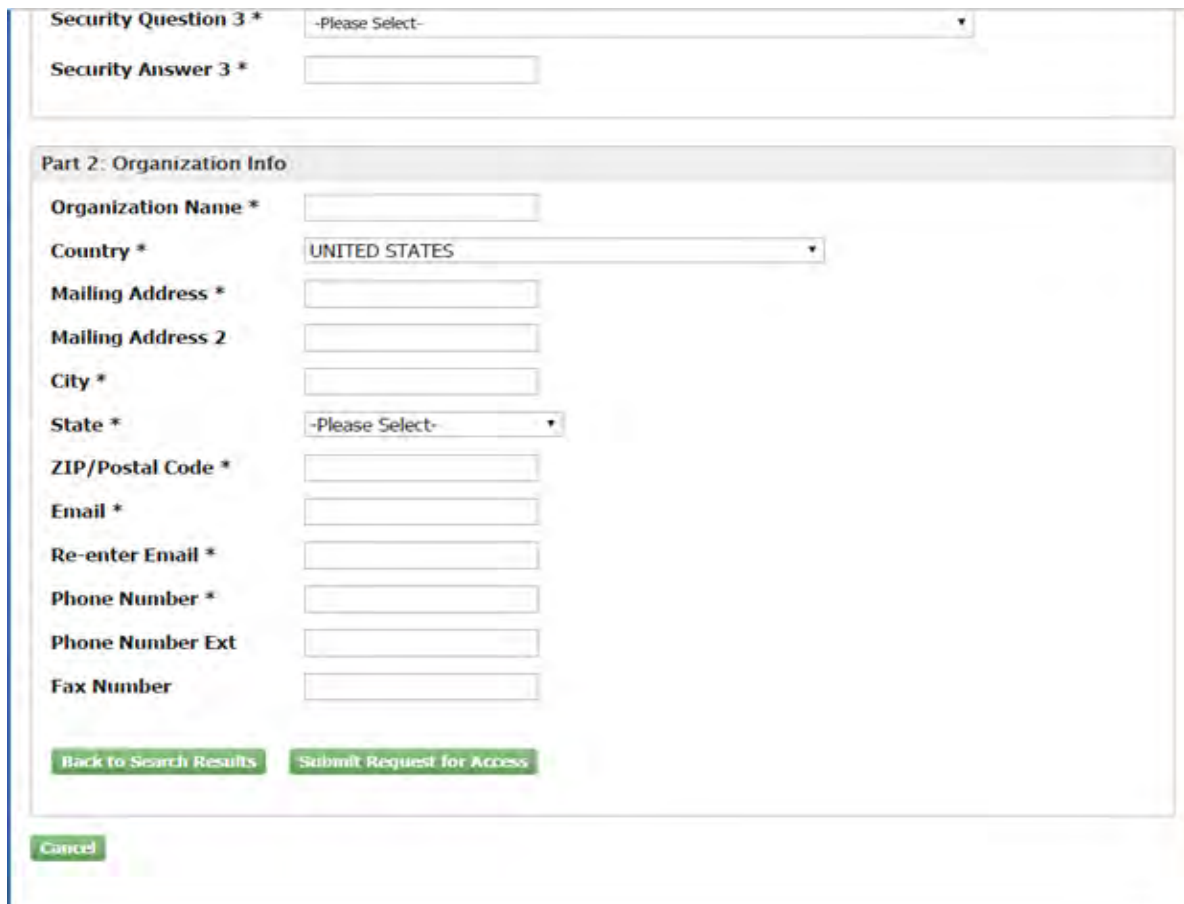
This feature will collect the following information for all other international organizations:

- Organization Name (required)
- Country (required)
- Mailing Address (required)

- Mailing Address 2

- Mailing Address 3

- Mailing Address 4

- City (required)

- ZIP/Postal Code (required)

- Email (required)

- Re-enter Email (required)

- Phone Number (required)

- Phone Number Ext

- Fax Number

After all required fields have been completed, click the 'Submit Request for Access' button to complete your request. After your user account has been activated, the requested organization will be added to the CDX system. The organization will be available in subsequent searches by organization ID only, unless the organization has been verified by the help desk, RMAM, or LexisNexis.

Exhibit 4-12 shows a screen capture of the 'User and Organization - Request to Add Organization' screen:

Exhibit 4-12: User and Organization – Request to Add Organization Screen

Navigation: Enter information into the required fields.

4.4.4   Confirmation Email

Once you have submitted your core registration information and reached the 'Confirmation' screen, an email will be sent to the email address you entered for the organization that you registered for on the 'User and Organization' screen (see Exhibit 4-13). The email will contain the account confirmation and the additional instructions. Once you receive the email, click the activation link. The link will take you to the CDX login screen where you will be asked to enter your user ID and password.

Exhibit 4-13 shows a screen capture of the Confirmation Email:
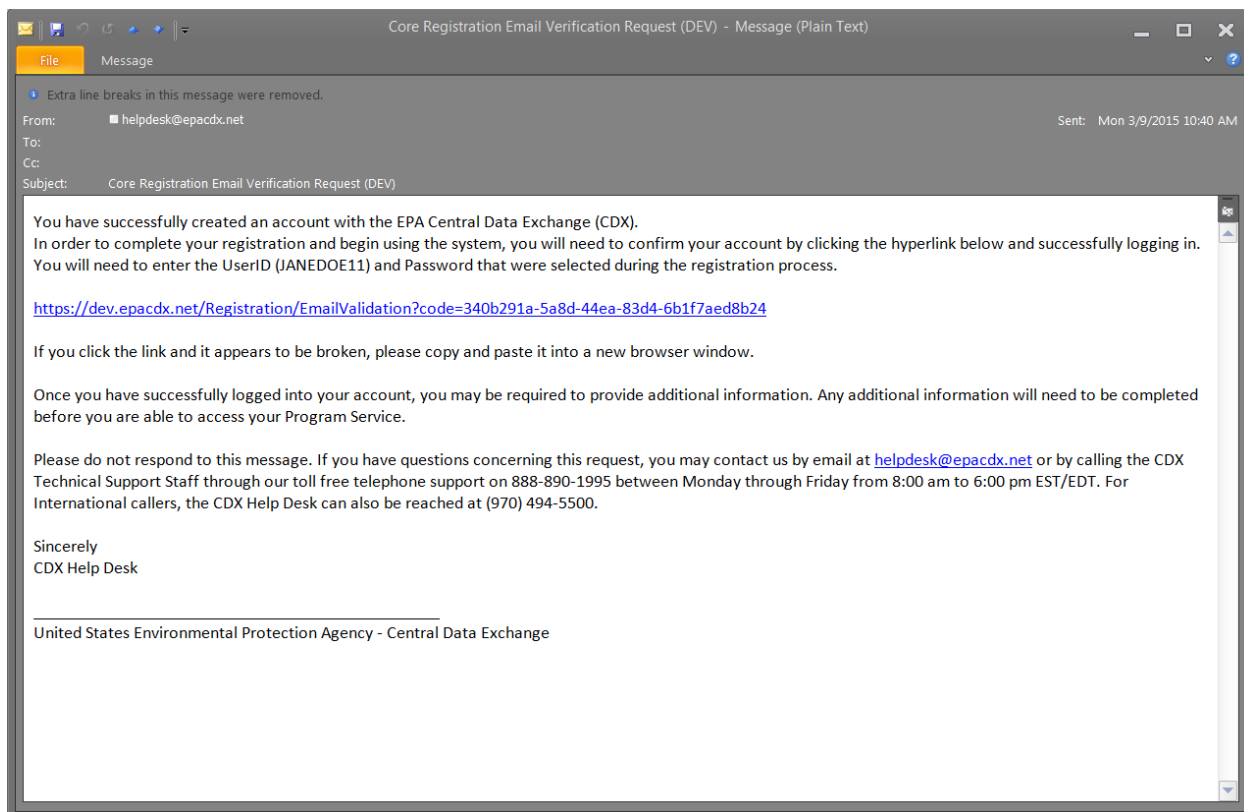
Exhibit 4-13: Confirmation Email

4.5 Logging in to MyCDX for New Users

Once you have clicked the activation link in the confirmation email, you will be taken to the CDX login screen (see Exhibit 4-14). If you try to log in prior to clicking the confirmation link, you will be taken to the user account completion screen where you can request another verification email to be sent to the email address on file (see

Exhibit **4-15**). If you enter the wrong validation code, or if the validation code has expired, an on-screen message will appear notifying you to contact the CDX Help Desk (see Exhibit 4-16).

After the correct information is accurately entered, you will be taken to the next screen to complete PSP's registration requirements.

Exhibit 4-14 shows a screen capture of the 'CDX Login' screen:

Exhibit 4-14: CDX Login Screen

Exhibit 4-15 shows a screen capture of the 'Resend Verification Email' screen:
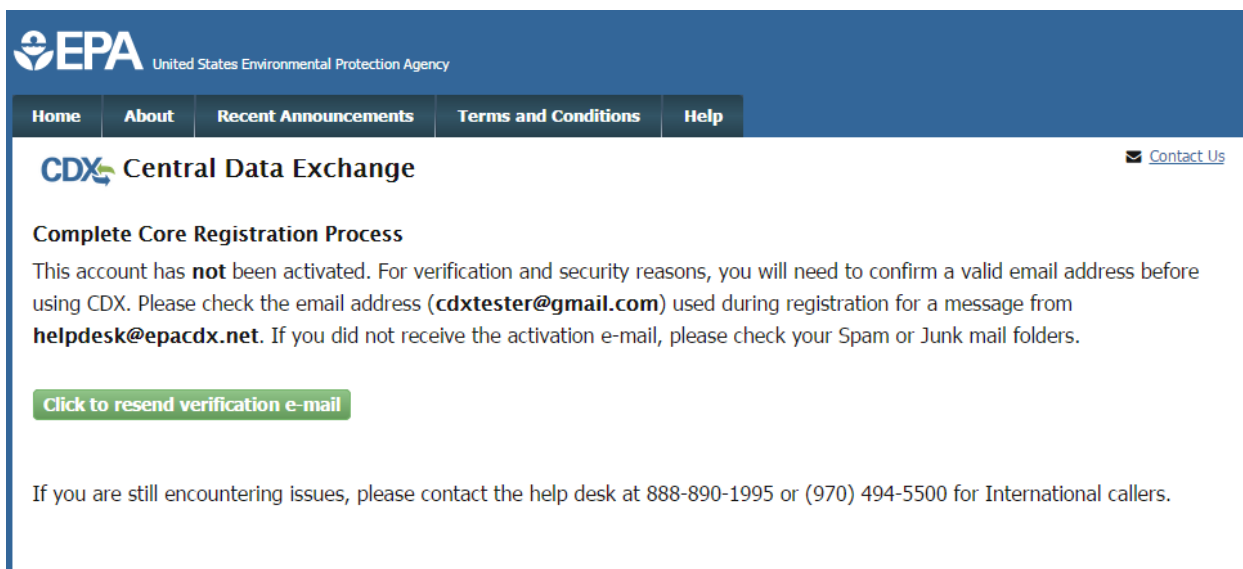
Exhibit 4-15: Resend Verification Email Screen

Exhibit 4-16 shows a screen capture of the 'Validation Code Not Found' screen:
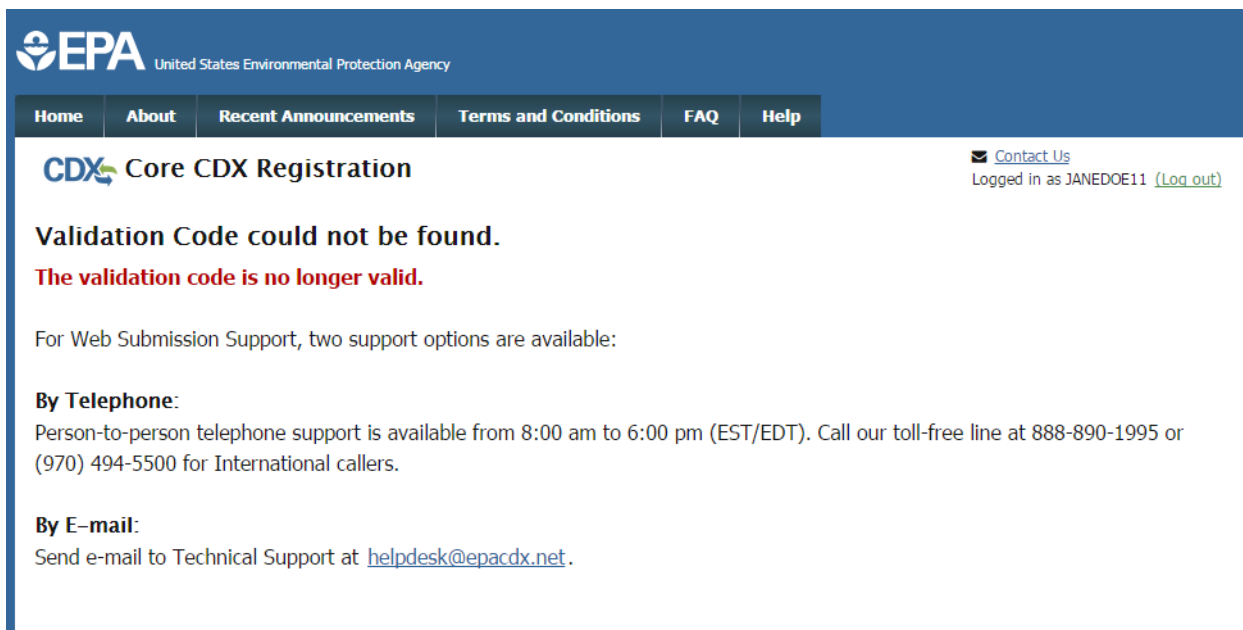
Exhibit 4-16: Validation Code Not Found Screen

5   Additional Verification

After you log into CDX from the activation link, you will be redirected to the screens for the additional information required for your PSP role.

5.1   Identity Verification Process

You will be given the option to use the electronic identity verification process (see Exhibit 5-1) or the paper identity verfication process. The CDX registration process provides an electronic identity verification service through LexisNexis, which is a third-party service that verifies a user's identity. If you choose to proceed with the electronic verification process, click the check box and click the 'Proceed to Verification' button.

The LexisNexis service will launch a new window, which navigates a user away from CDX to collect additional Personally Identifiable Information (PII) that CDX does not store or use. If you choose not to utilize LexisNexis and click the 'sign the paper form' link (see Exhibit 5-1), CDX will proceed to the paper processing option and instruct you to print, sign, and mail identity proofing documentation.

The 'LexisNexis Data Collection' window will display fields for a user to enter in PII information (see Exhibit 5-2). You must provide the necessary PII for LexisNexis to complete the identity validation.

You will be redirected back to CDX after submitting the information and one of the following scenarios will occur:

1. You successfully validate to the minimum standards. After clicking the 'Continue' button, the system will direct you to set your 20-5-1 questions and allow you to electronically sign the ESA (see **Section 5.2.1**).
2. You unsuccessfully validate to the minimum standards after clicking the 'Continue' button. If your user identity proofing failed, you can only sign the paper ESA.
3. You choose to sign the paper ESA by clicking the 'Continue' button without submitting the LexisNexis form and clicking the paper ESA link (see Exhibit 5-3).
4. You choose to discontinue the registration process by clicking the 'Cancel' button on the 'Additional Verification' screen (see Exhibit 5-1). You will be sent the paper ESA in your MyCDX inbox. You must contact the CDX helpdesk for further information to obtain access to the program role requested.

Exhibit 5-1 shows a screen capture of 'CDX Registration: Additional Verification' screen:
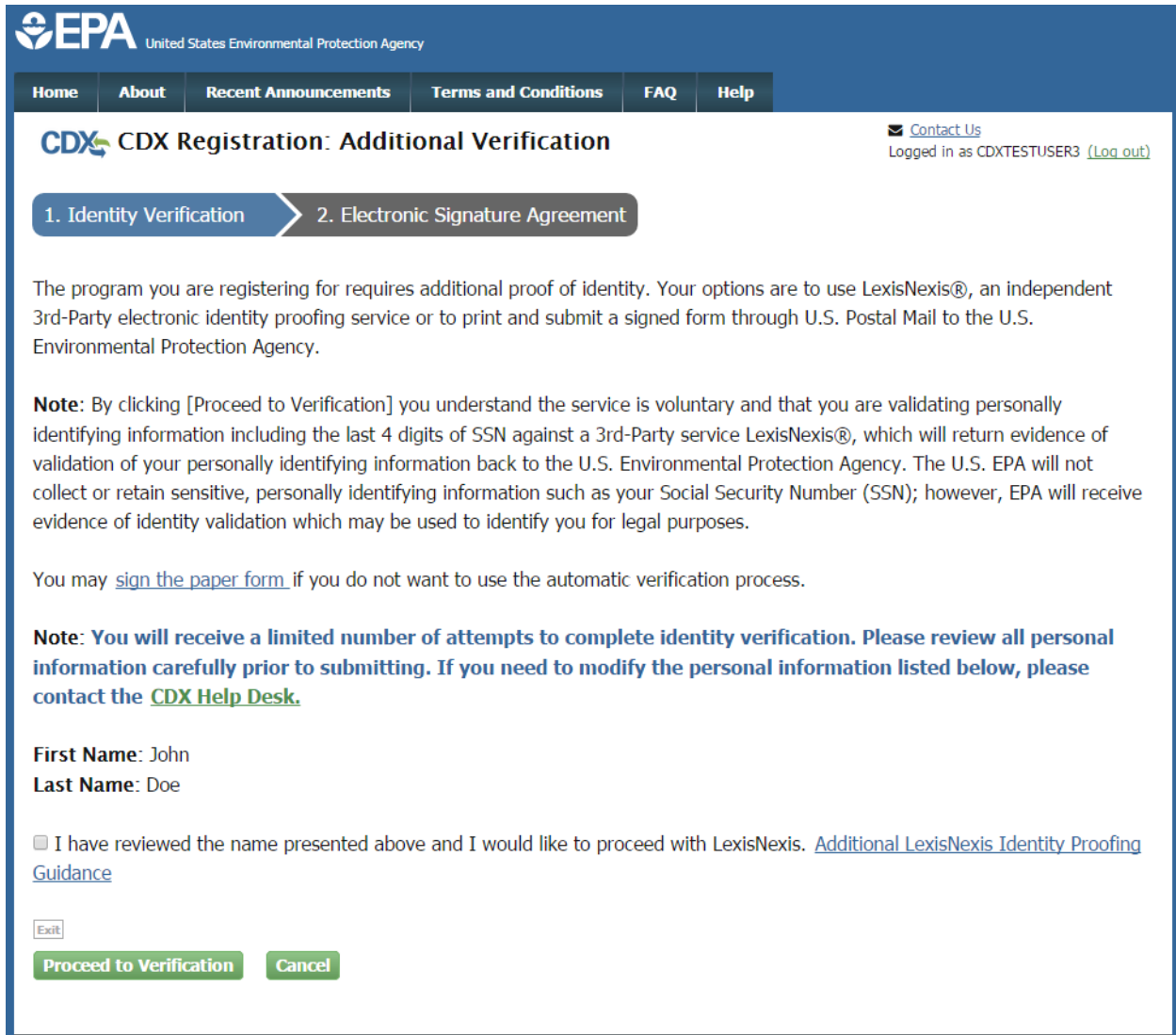
Exhibit 5-1: CDX Registration: Additional Verification Screen

Exhibit 5-2 shows a screen capture of the 'LexisNexis Data Collection' pop-up window:

Exhibit 5-2: LexisNexis Data Collection Pop-Up Window

Exhibit 5-3 shows a screen capture of the 'LexisNexis Results' screen:
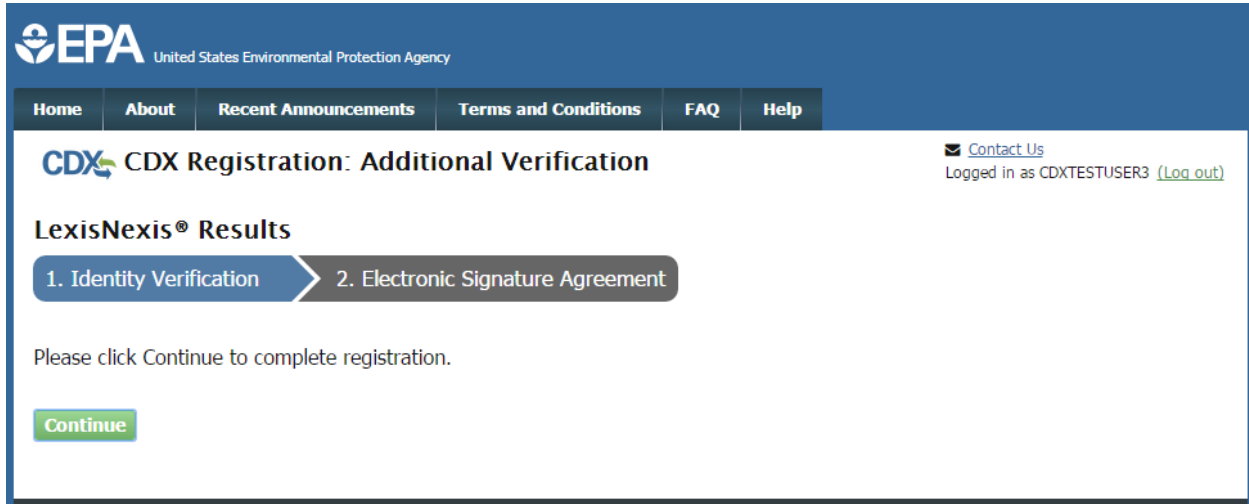
Exhibit 5-3: LexisNexis Results Screen

Exhibit 5-4 shows a screen capture of the 'LexisNexis Results (without Verification)' screen:
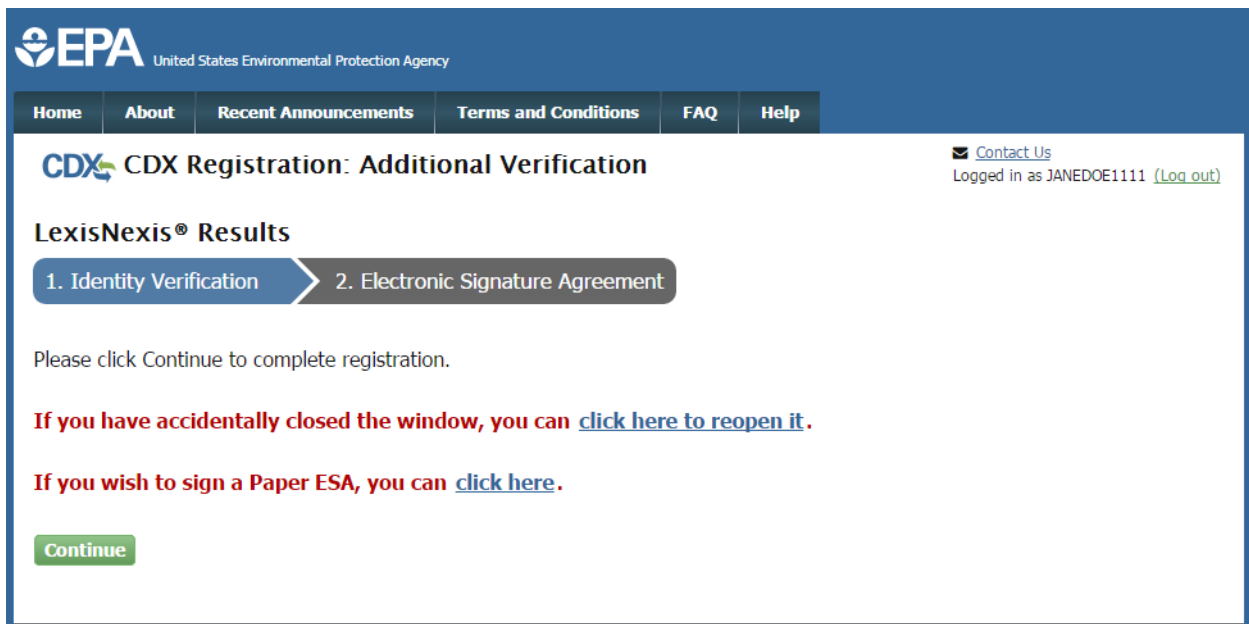
Exhibit 5-4: LexisNexis Continuing Without Verification Screen

Exhibit 5-5 shows a screen capture of the 'Electronic Signature Agreement' screen:

Exhibit 5-5: Electronic Signature Agreement Screen

5.2 CDX Electronic Signature Agreement (ESA)

If you do not have a current ESA, you will be prompted to sign an ESA, which can be signed electronically or manually. The following sections provide more detail about each option.

5.2.1 Electronic CDX Electronic Signature Agreement (ESA)

CDX provides twenty questions to choose from which will help validate your identity. You will be prompted to enter Cross-Media Electronic Reporting Regulation (CROMERR) questions after you have successfully passed LexisNexis identity proofing or have been approved via the help desk.

You will choose five questions and provide answers for each. You will not be allowed to select and provide duplicate questions or answers. The questions that you select should be easy for you to remember, but difficult for someone else to guess. You will be required to answer one of these five questions upon submitting any packages within PSP. You will be prompted with a question randomly chosen by the system during the signing process. **Important:** It is important that your remember the answers to these five questions. If you forget the answers and lock your account after three unsuccessful tries, you will have to call the CDX Help Desk to reset the answers.

If you pass LexisNexis validation and choose to sign the ESA electronically, the system will verify that the CROMERR 20-5-1 questions and answers have been set. If the questions and answers were previously set, you will be directed to a page to view the ESA. If these have not been set, you will be directed to a page to provide five questions and answers before proceeding to the ESA page (see Exhibit 5-6). The questions must be completed before you can electronically sign the ESA. Click the 'Save Answers' button after providing the questions and answers. You will receive an email confirmation of your 20-5-1 questions to both your provided email address and MyCDX inbox. **Important:** For security purposes, the answers to these questions will not be sent to your MyCDX inbox or email address. It is important that your remember the answers to these five questions. If you forget the answers and lock your account after three unsuccessful tries, you will have to call the CDX Help Desk to reset the answers.

After you complete the 20-5-1 question process, review the ESA, and click the 'Sign Electronically' button, the system will launch the CDX CROMERR widget. As part of the CDX CROMERR widget process, you will be required to re-validate your user ID and password, provide the answer to one of the 20-5-1 questions, and officially sign the ESA (see Exhibit 5-7, Exhibit 5-8, and Exhibit 5-9).

When you officially sign the ESA, a copy of the ESA, along with your electronic signature, is stored in the CDX CROMERR archives. A copy of the ESA is also sent to your MyCDX inbox.

If you choose the paper ESA process, the questions will not be displayed in CDX until your program service role has been activated. After your role has been activated, you will be prompted to provide your questions and answers before being able to navigate to the 'MyCDX' landing page.

Exhibit 5-6 shows a screen capture of the 'CROMERR 20-5-1 Question and Answer' on the 'eSIG-PIN Entry' screen:

Exhibit 5-6: eSIG-PIN Entry CROMERR 20-5-1 Question/Answer Screen

Important: It is important that your remember the answers to these five questions. If you forget the answers and lock your account after three unsuccessful tries, you will have to call the CDX Help Desk to reset the answers.

Exhibit 5-7 shows a screen capture of the 'Electronic CDX ESA' screen:

Exhibit 5-7: Electronic CDX ESA Screen

Exhibit 5-8 and Exhibit 5-9 show screen captures of the 'CROMERR eSignature Widget' pop-up window:
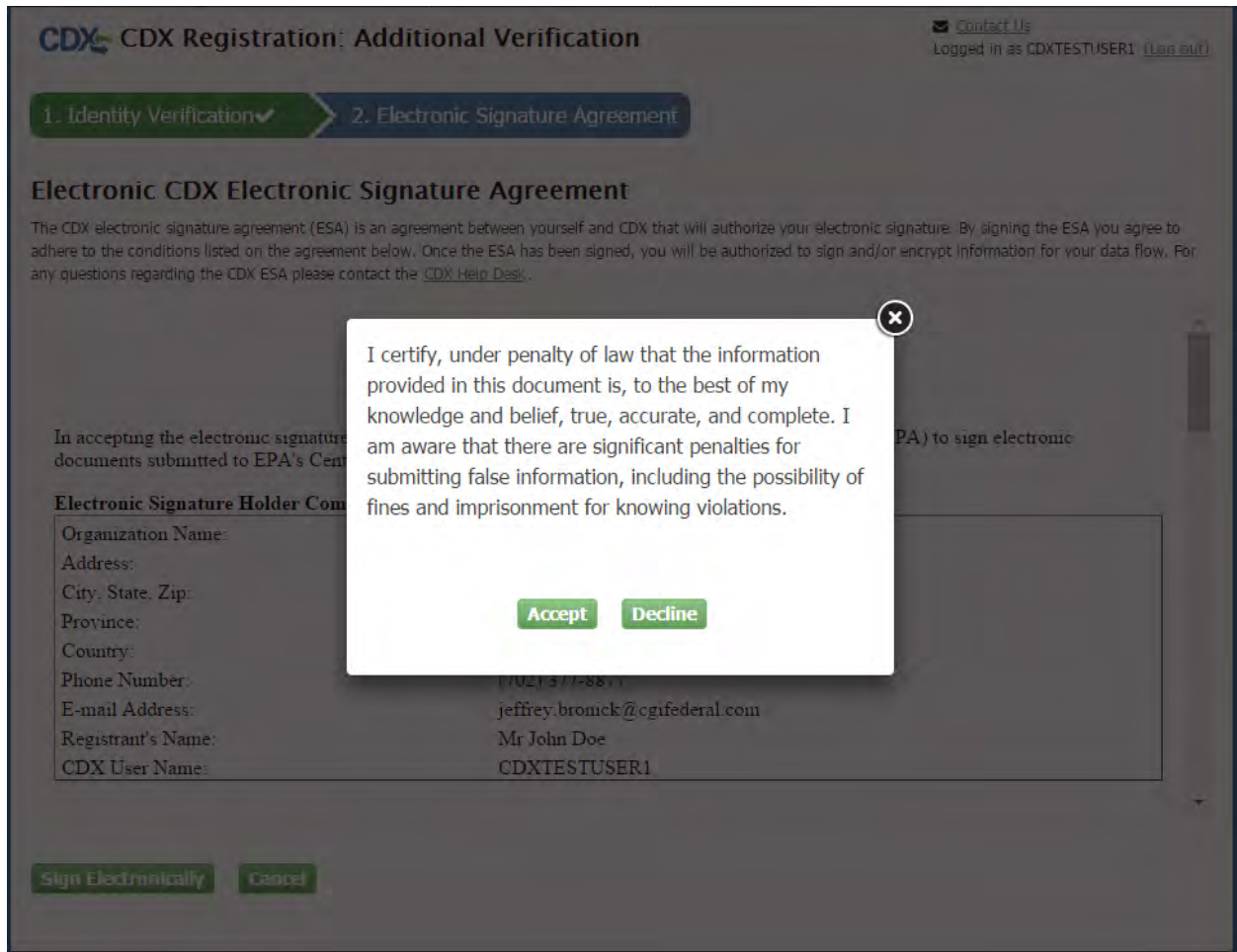
Exhibit 5-8: CROMERR eSignature Widget (Screen 1)
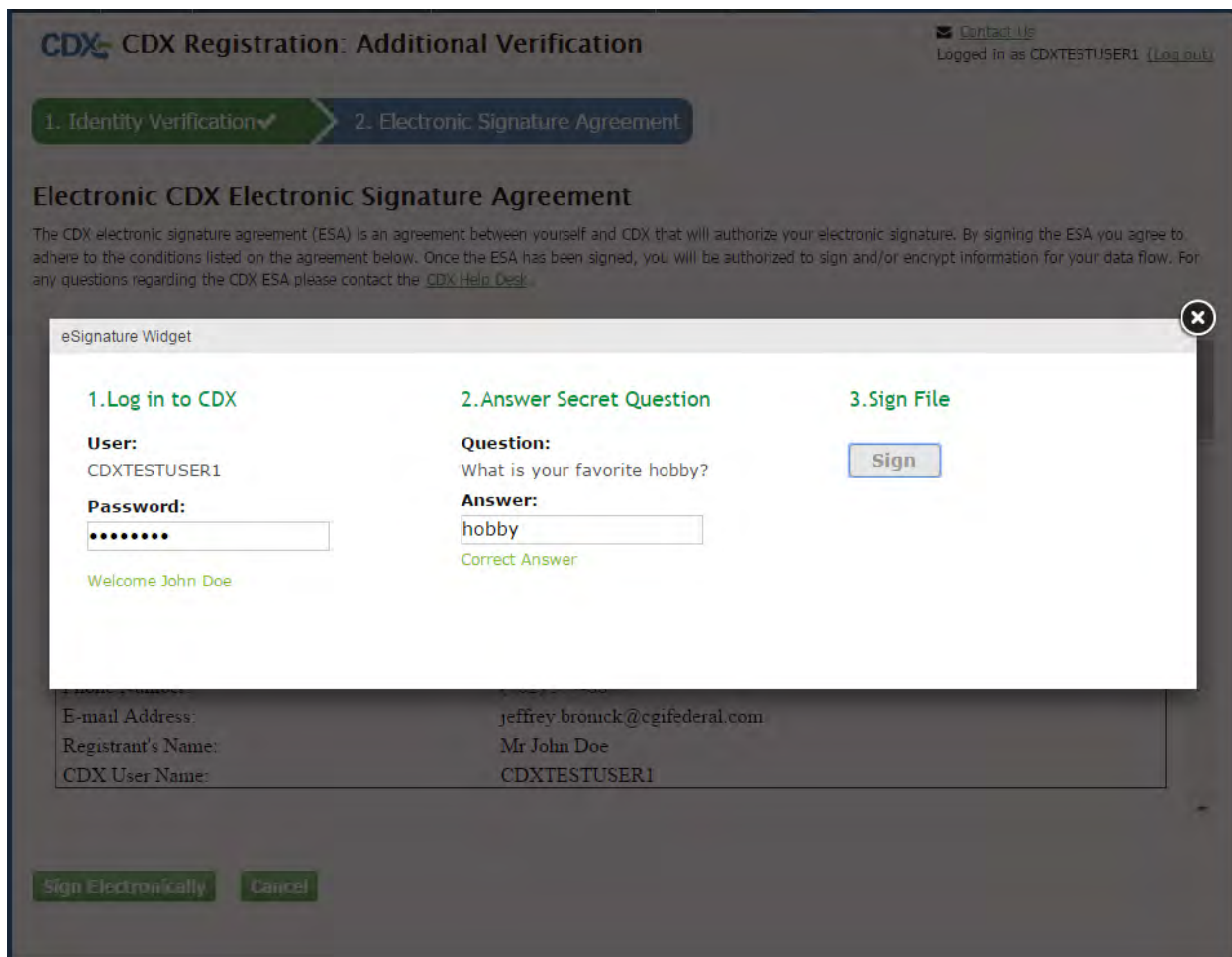
Exhibit 5-9: CROMERR eSignature Widget (Screen 2)

5.2.2 Paper ESA

If you do not wish to leverage the LexisNexis process or are unable to be properly validated to meet the minimum requirements, you will be required to follow the existing paper ESA process. The paper process allows you to print the ESA, provide a wet ink signature, and mail the signed ESA to EPA. A copy of the ESA form will be saved in your CDX 'Inbox' for future reference and reprinting.

Exhibit 5-10 shows a screen capture of the 'Paper CDX ESA' pop-up window:
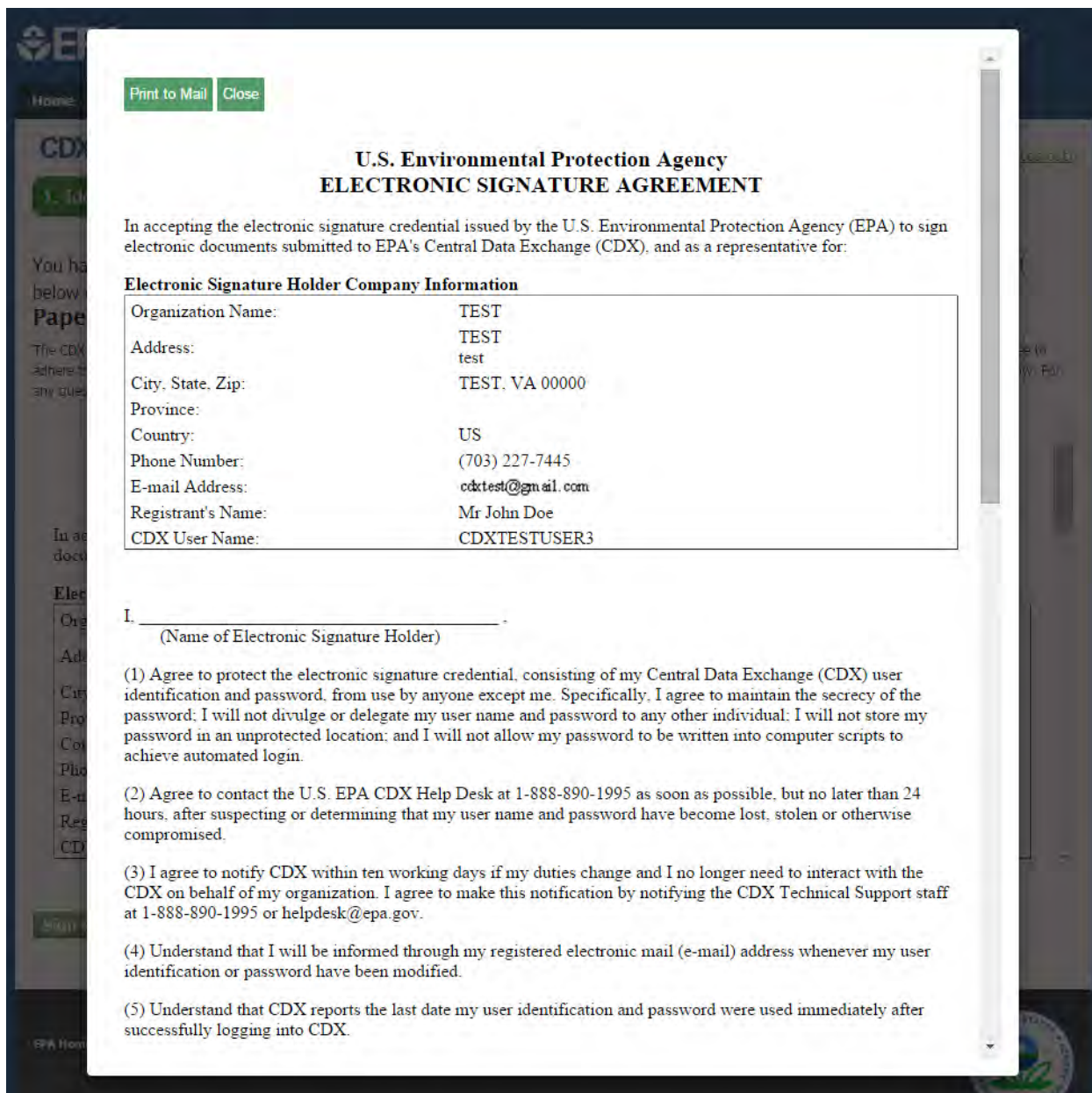
Exhibit 5-10: Paper CDX ESA Pop-Up Window

5.3 RMAM Approval

For PSP, a user must wait for a RMAM, an individual responsible for the approval of program service role access requests, to grant access to the role. In this case, the user will not be able to do anything beyond entering registration information. If you have any issues waiting for the approval, you will need to reach out to the point of contact for PSP.

5.4   Registration Notifications

After completing the registration process, you will receive confirmation of successful registration (see

Exhibit 5-11). If you choose the paper ESA option, you will receive a confirmation email when your role has been approved (see Exhibit 5-12).

Exhibit 5-11 shows a screen capture of a 'CDX Registration' email after you have successfully registered with CDX:
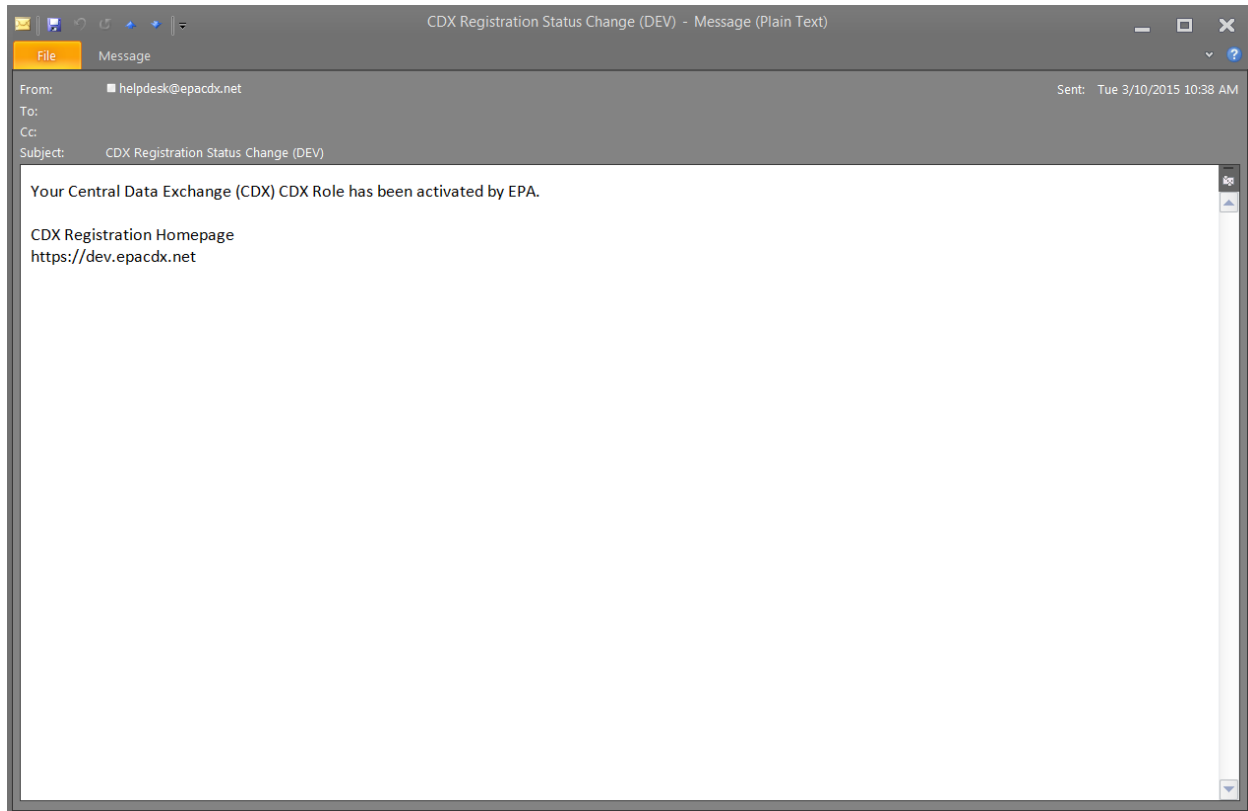
Exhibit 5-11: CDX Registration – Role Activation Email

Exhibit 5-12 shows a screen capture of the 'CDX Registration' email after you have changed a role status or have successfully created an account with CDX and are awaiting approval:
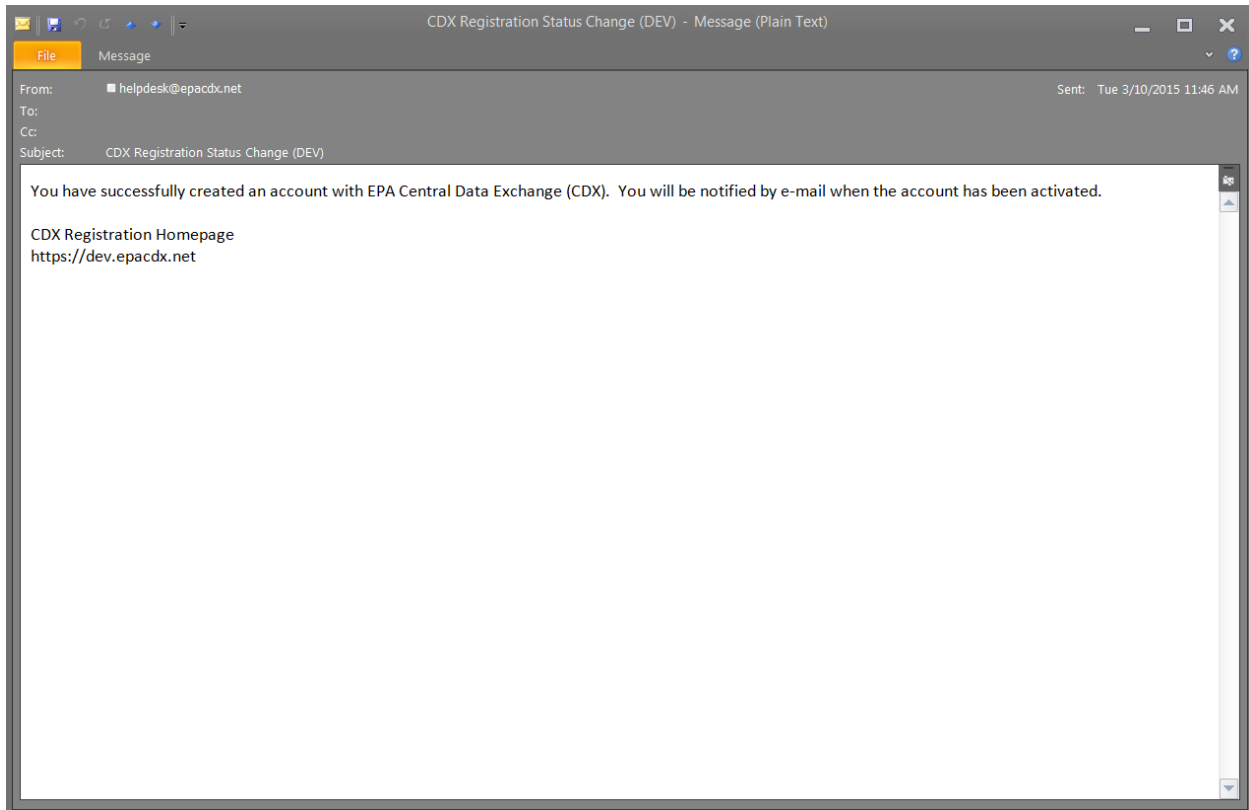
Exhibit 5-12: CDX Registration – Role Status Change Email

5.5   Access PSP

Once your account has been activated, you can access PSP via the 'Primary Submitter' or 'Submitter' role link within the 'Role' column on the 'MyCDX' page (see Exhibit **5-13** below).

Exhibit 5-13: Access PSP

6 Managing User and Organization Information

Once you have entered registration information and activated the user account, you may perform various functions such as adding additional organizations to a username, modifying user information, or adding additional program services to a username.

6.1 Managing Organization Information

If necessary, a user is able to add additional organizations that may be associated with a username. The new organization will then be added to the 'Organization Details' section. During subsequent logins, a user will be able to select the organization for which they would like to submit for.

To add additional organizations to a username, click the 'Modify User / Organization Information' button on the 'My Profile' tab that displays after logging in. A user can then choose to either search for an existing organization to add or request a new organization to be added. If a user chooses to add a new organization, populate the required organization contact information and click the 'Submit Request for Access' button.

The additional organization then displays in the 'Organization Details' section of the 'My Profile' page.

Exhibit **6-1** shows a screen capture of the 'My Profile' screen:

Exhibit 6-1: My Profile Screen

Exhibit 6-2 shows a screen capture of the 'Modify User/Organization Information' screen (Scroll 1):

Exhibit 6-2: Modify User/Organization Information Screen (Scroll 1)

Exhibit 6-3 shows a screen capture of the 'Modify User/Organization Information' screen (Scroll 2):

Exhibit 6-3: Modify User/Organization Information Screen (Scroll 2)

![CDX Logo]

Exhibit 6-4 shows a screen capture of the 'Modify User/Organization Information – Add Organization' screen (Scroll 3):

Part 3: Organization Information

New Organization

Organization Name *	[ ]
Country *	UNITED STATES ▼
Mailing Address *	[ ]
Mailing Address 2	[ ]
City *	[ ]
State *	-Please Select- ▼
ZIP/Postal Code *	[ ]
Email *	[ ]
Re-enter Email *	[ ]
Phone Number *	[ ]
Phone Number Ext	[ ]
Fax Number	[ ]

[Back to Search Results] [Submit Request for Access]

[Deactivate User Account] [Back to MyCDX]

Exhibit 6-4: Modify User/Organization Information Screen (Scroll 3)

6.2 Add PSP to an existing CDX Account

Users may need to submit forms under several different program services. The following sections provide more details regarding how multiple program services can be added.

6.2.1 Adding Program Services

You may add a program service, such as PSP, and associate a program service with a current organization or a new organization.

CDX provides twenty questions to choose from which will help validate your identity. You will be prompted to enter CROMERR questions after you have successfully passed LexisNexis identity proofing or have been approved via the help desk.

You will choose five questions and provide answers for each. You will not be allowed to select and enter duplicate questions or answers. The questions that you select should be easy for you to remember, but difficult for someone else to guess. You will be required to answer one of these five questions upon submitting any forms that utilize the CROMERR widget for electronic signatures. You will be prompted with a question randomly chosen by the system during the signing process.

If you pass LexisNexis validation and choose to sign the ESA electronically, the system will verify that the CROMERR 20-5-1 questions and answers have been set (see **Section 5.2.1**). If the questions and answers were previously set, you will be directed to a page to view the ESA (see Exhibit 6-10). If these have not been set, you will be directed to a page to provide five questions and answers before proceeding to the ESA page. The questions must be completed before you can electronically sign the CDX ESA or sponsor letter. You must click the 'Save Answers' button after providing the questions and answers. You will receive an email confirmation of your 20-5-1 questions to both your provided email address and CDX inbox.

After you complete the 20-5-1 question process, review the ESA, and click the 'Sign Electronically' button, the system will launch the CDX CROMERR widget. As part of the CDX CROMERR widget process, you will be required to re-validate your user ID and password, provide the answer to one of the questions, and officially sign the ESA.

When you officially sign the ESA, a copy of the ESA, along with your electronic signature, is stored in the CDX CROMERR archives. A copy of the ESA is also sent to your CDX inbox.

If you choose the paper ESA process, the questions will not be displayed in CDX until your program service role has been activated. After your role has been activated, you will be prompted to provide your questions and answers before being able to navigate to the 'MyCDX' landing page.

Important: If you have already passed identity proofing with another program service and organization, you will not have to pass LexisNexis verification again. You will instead be navigated to signing an ESA for the new organization and role (see Exhibit 6-10). After signing the ESA, you will be able to access PSP.

Important: If you are adding PSP to an organization for which you have already signed an ESA, you may not have to sign an ESA again (since the identity proofing requirements for each

program service may be the same). In this case, after clicking the 'Submit Request for Access' button on the 'Organization Information' screen (see Exhibit 6-9), you will be navigated to the 'Manage Program Services' screen. You will receive a message stating that the program service has been successfully added to your organization, and you will be able to access PSP.

Exhibit 6-5 shows a screen capture of the 'MyCDX' screen:

Exhibit 6-5 MyCDX Screen

Exhibit 6-6 shows a screen capture of the 'Manage Program Services' screen:

Exhibit 6-6: Manage Program Services Screen

Exhibit 6-7 shows a screen capture of the 'Program Service' screen:
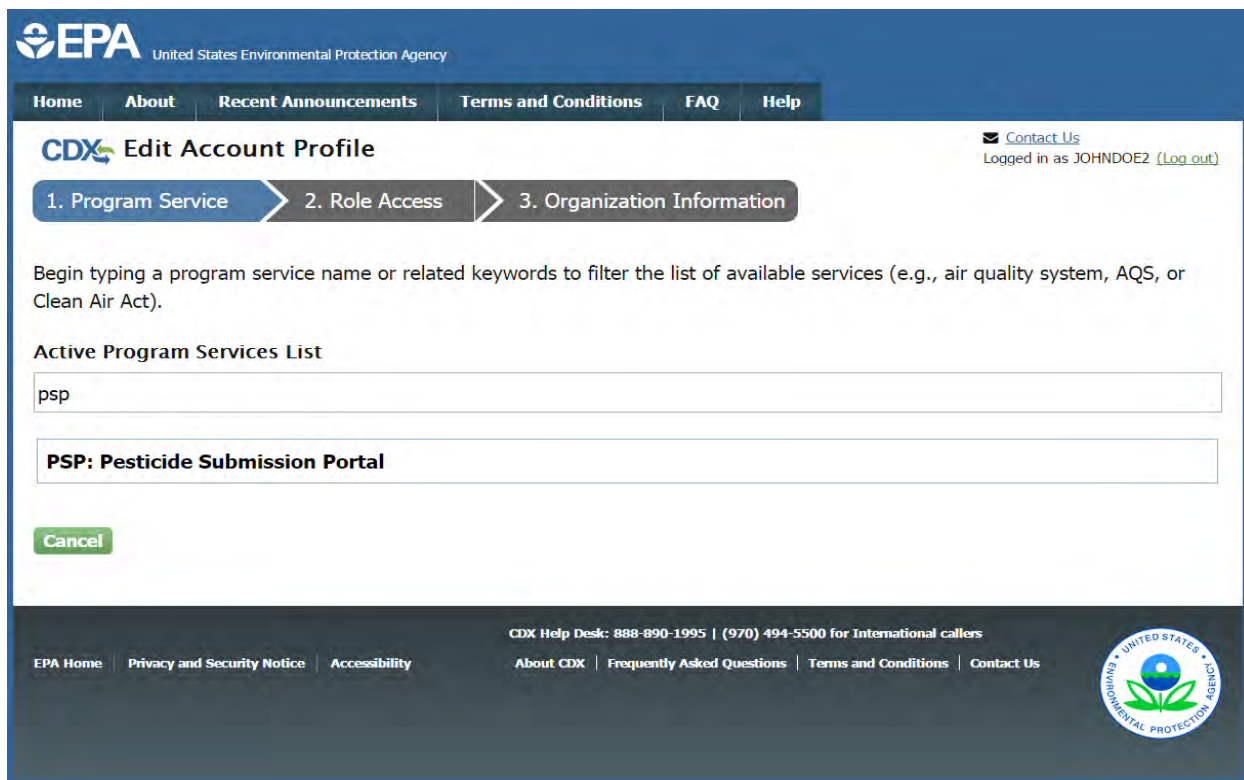
Exhibit 6-7: Program Service Screen

6.2.2 Request Role Access

After selecting PSP on the 'Program Service' screen, the next step will be to select 'Primary Submitter' as the role. Again, you may only register as a Primary Submitter; the Submitter role must receive a sponsorship request and cannot register through this method.

After selecting your role, enter the EPA OPP Company Number that you will submit for.

Exhibit 6-8 shows a screen capture of the 'Role Access' screen:
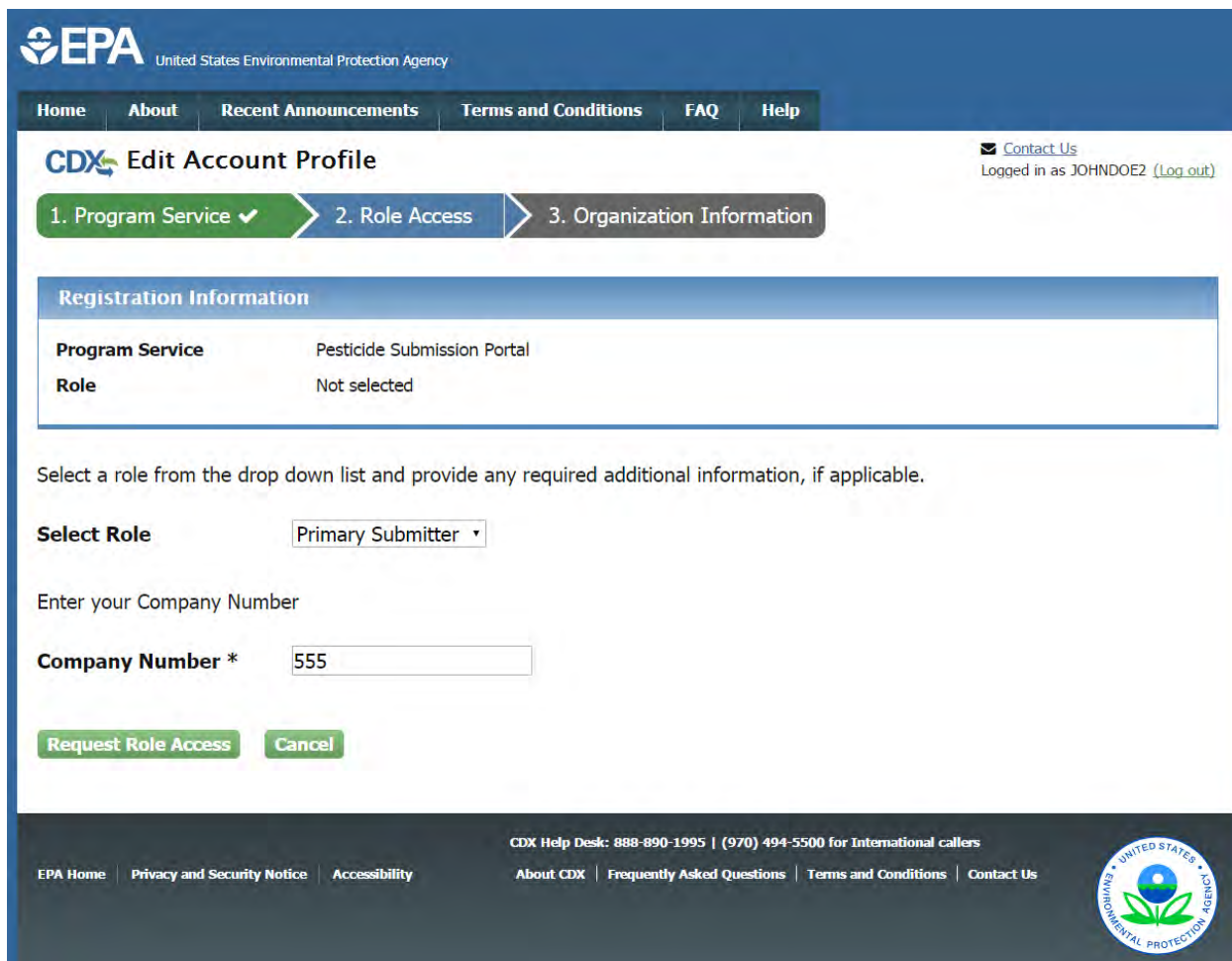
Exhibit 6-8: Role Access Screen

6.3   Organization Information

The 'Organization Information' screen is the last step in adding a new program service. Click the 'Select a Current Organization' radio button to select and organization already associated with your account or click the 'Request to Add an Organization' radio button to search for an organization to add.

After all required fields have been completed, click the 'Submit Request for Access' button to complete your request.

Exhibit 6-9 shows a screen capture of the 'Organization Information' screen:

Exhibit 6-9: Organization Information Screen

Exhibit 6-10 shows a screen capture of the 'Electronic Signature Agreement' screen:

Exhibit 6-10: Electronic Signature Agreement Screen

Exhibit 6-11 shows a screen capture of the 'Application Profile Settings' screen that is displayed if a user is registered for multiple organizations under the same program service:
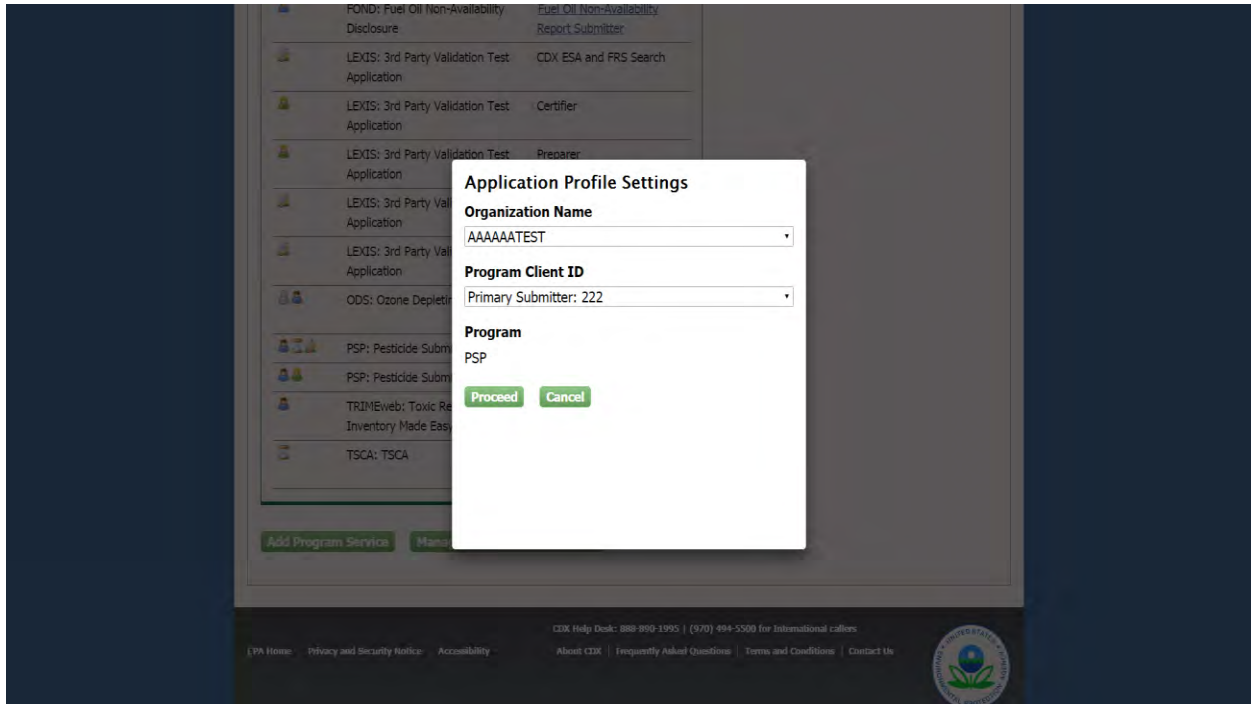
Exhibit 6-11: Application Profile Settings Screen

7 Manage Program Services and Add Additional EPA OPP Company Numbers

You can access the 'Manage Program Services' screen by clicking the hyperlink above the table listing your program service roles on the 'MyCDX' tab (see Exhibit 7-1).

The 'Manage Program Services' link allows you view all of your roles in the system for your specific organization as well as the current statuses of these roles (e.g., active, awaiting approval, deactivated). You can also request to add new roles and program services to an existing organization.

From this page, you will have the option to edit or deactivate the roles in the list. If you deactivate a role in the list, you must provide confirmation in the pop-up window (see Exhibit 7-2). The 'OK' button will deactivate the chosen role. The 'Cancel' button will close the pop-up box and no action will be taken. Once a role has been deactivated, it cannot be reactivated and you will need to request to add the role to the program service again.

You may add another role for a program flow that you are already associated to by clicking the 'Request New Role' link next to the existing flow, which will take you to the screen seen below (see Exhibit 7-3). You will have to choose 'Primary Submitter' and will be allowed to enter another EPA OPP Company Number. **Note:** You can add multiple EPA OPP Company Numbers to your company via this method.

Exhibit 7-1 shows a screen capture of the 'Manage Program Services' screen:
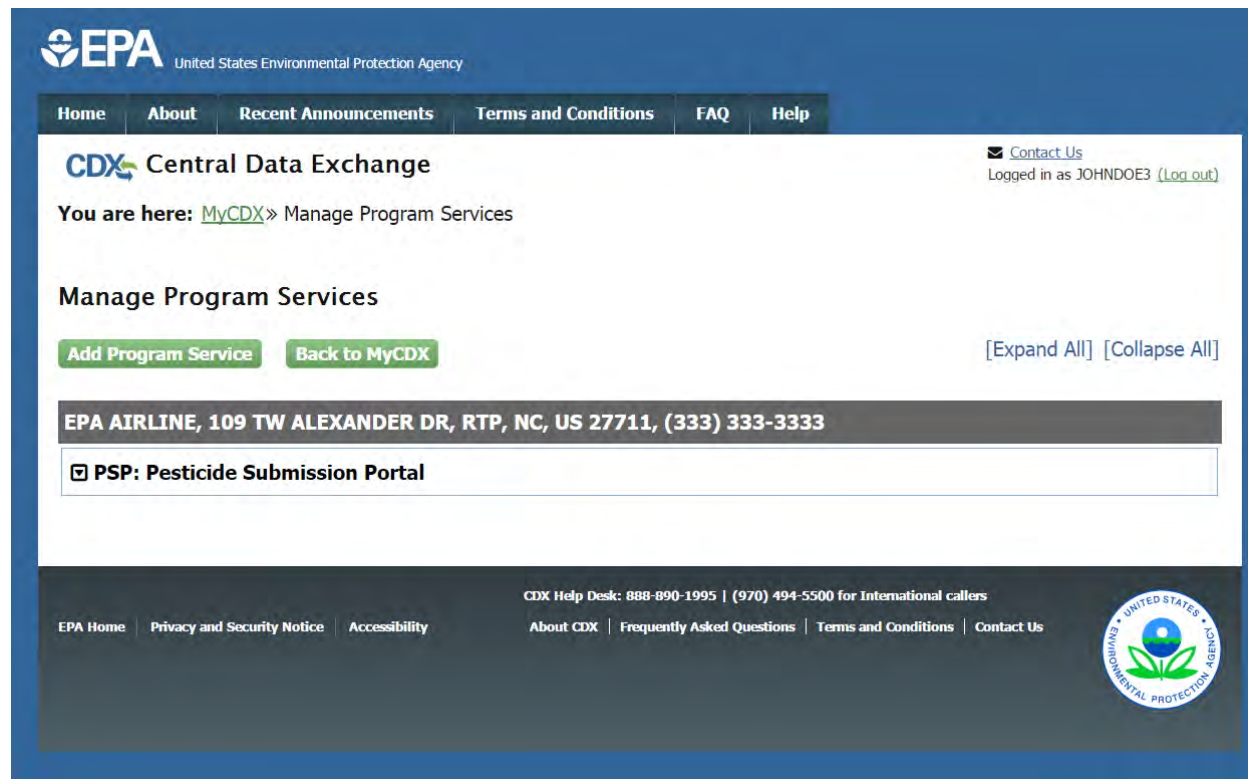
Exhibit 7-1: Manage Program Services Screen

Exhibit 7-2: Deactivation Confirmation Pop-up Window

Exhibit 7-3 shows a screen capture of the 'Request a New Role' screen:

Exhibit 7-3: Request a New Role Screen

8   PSP Role Sponsorship

Primary Submitters can sponsor Submitters to submit PSP packages on behalf of their company. Sponsorship can only be initiated by the Primary Submitter, and both the Primary Submitter and Submitter will have to review and accept the sponsorship request.

8.1   Role Sponsorship

As a Primary Submitter, click the 'Role Sponsorship' tab to identify a new or current user who will serve as a Submitter.

The 'Role Sponsorship' screen displays various options available, including initiating the role sponsorship process, approving/denying sponsorship requests, and viewing/modifying existing privileges.

Exhibit 8-1 shows a screen capture of the 'Role Sponsorship' screen:
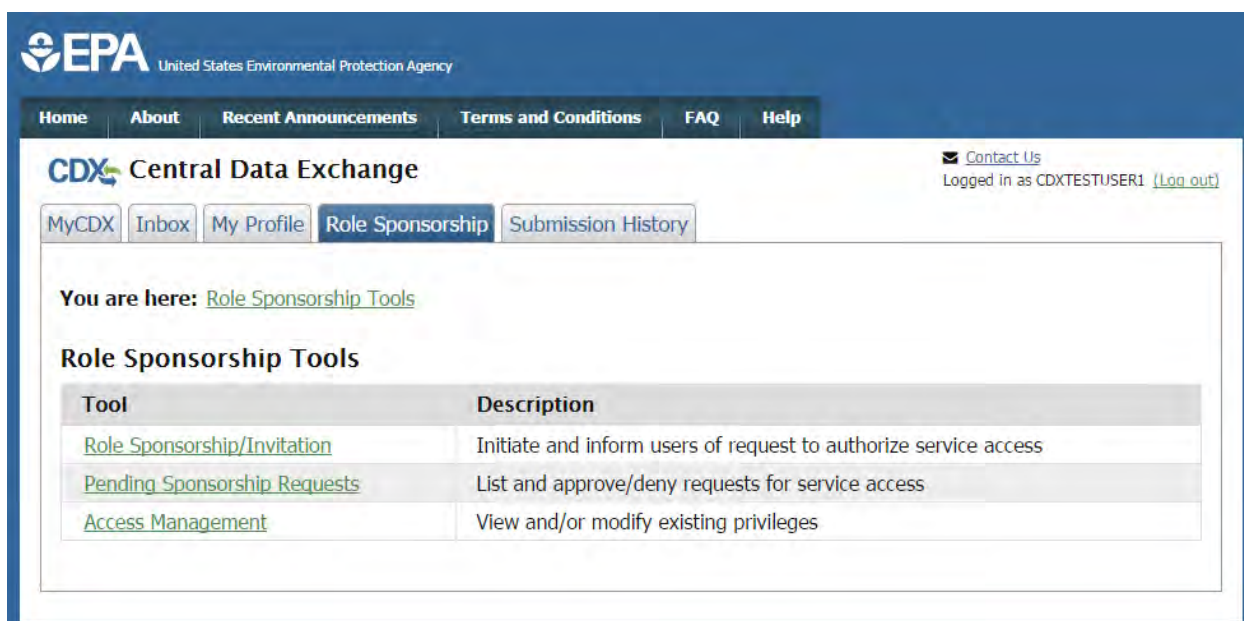
Exhibit 8-1 Role Sponsorship Screen

8.2   Role Sponsorship/Invitation

The 'Role Sponsorship/Invitation' screen is the next step in identifying a user to sponsor as a Submitter for PSP.

In the 'Step 1: Recipient Information' field set, a Primary Submitter enters the email address of the user to sponsor as a Submitter

In the 'Step 2: Sponsorship Information' field set, a Primary Submitter selects PSP and selects 'Submitter' from the 'Role' drop-down menu.

Click the 'Submit' button to navigate to the 'Role Sponsorship Review' screen (see Exhibit 8-3).

Exhibit 8-2 shows a screen capture of the 'Role Sponsorship/Invitation' screen.
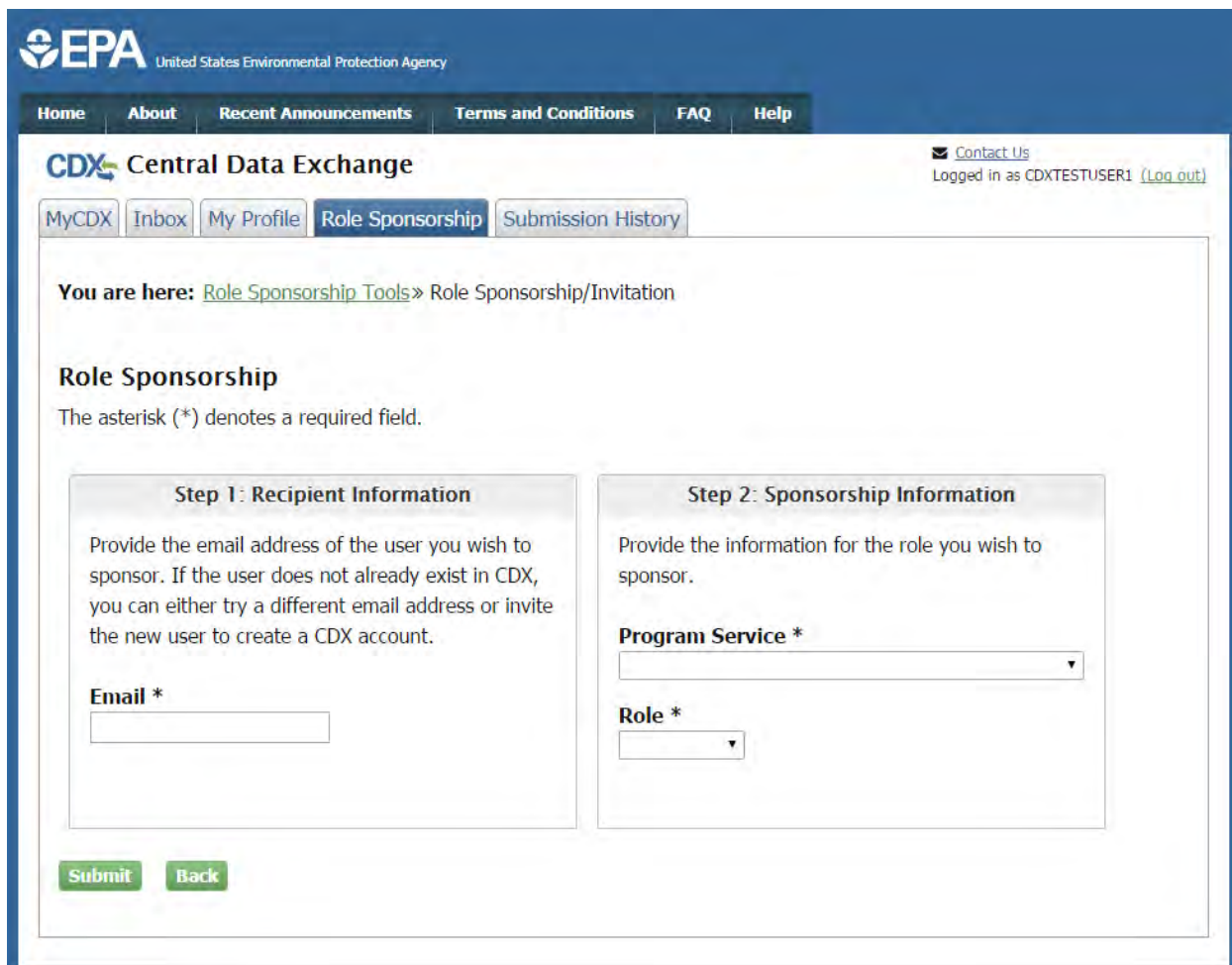
Exhibit 8-2: Role Sponsorship/Invitation Screen

8.2.1   Role Sponsorship Review

The 'Role Sponsorship Review' screen displays the details of the role sponsorship, including the program service, user role, and email address of the identified Submitter.

The Primary Submitter will indicate whether the provided email address is correct or incorrect and provide updates if necessary.

To proceed with the role sponsorship process, select the 'Yes, the provided email address is correct' radio button and click the 'Submit' button. If you select the 'No, the provided email address is incorrect and must be updated' radio button, click the 'Back' button and re-enter the agent/consultant user information. A pop-up window displays to confirm the email address of the specified Submitter (see Exhibit 8-4). You must enter the email address of the specified Submitter before the application generates the email invitation. Multiple confirmations are required to confirm email address accuracy.

Click the 'Confirm' button to generate an email that will be sent to the identified Submitter. The Submitter will receive an email to review or cancel the sponsorship request (see Exhibit 8-5). As a Primary Submitter, you will be sent a copy of this email for your records (see Exhibit 8-6). Click the 'review this sponsorship' link within the email to generate the 'Sponsorship Information' screen. Click the 'cancel this sponsorship request' link within the email to cancel the sponsorship request (see Exhibit 8-5).

Exhibit 8-3 shows a screen capture of the 'Role Sponsorship Review' screen:
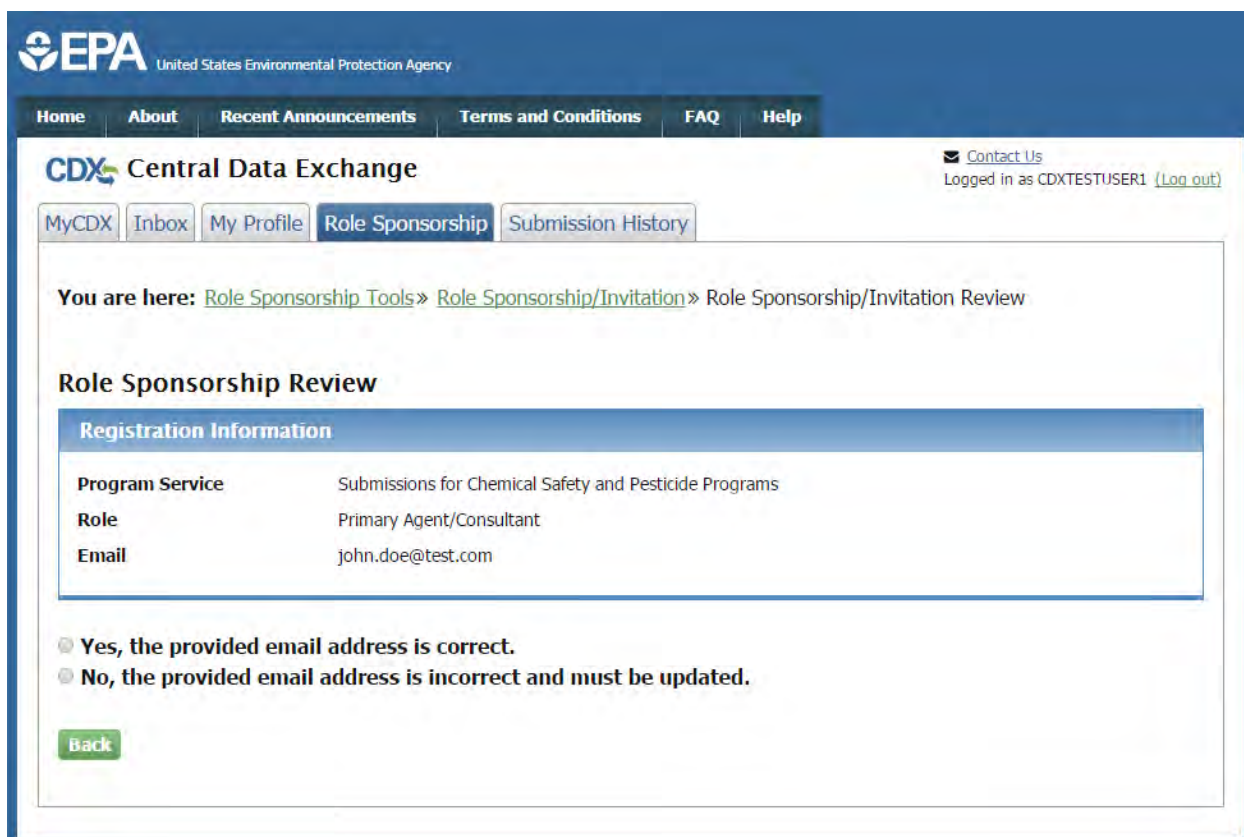
Exhibit 8-3: Role Sponsorship Review Screen

Exhibit 8-4 shows a screen capture of the 'Email Confirmation' pop-up window:
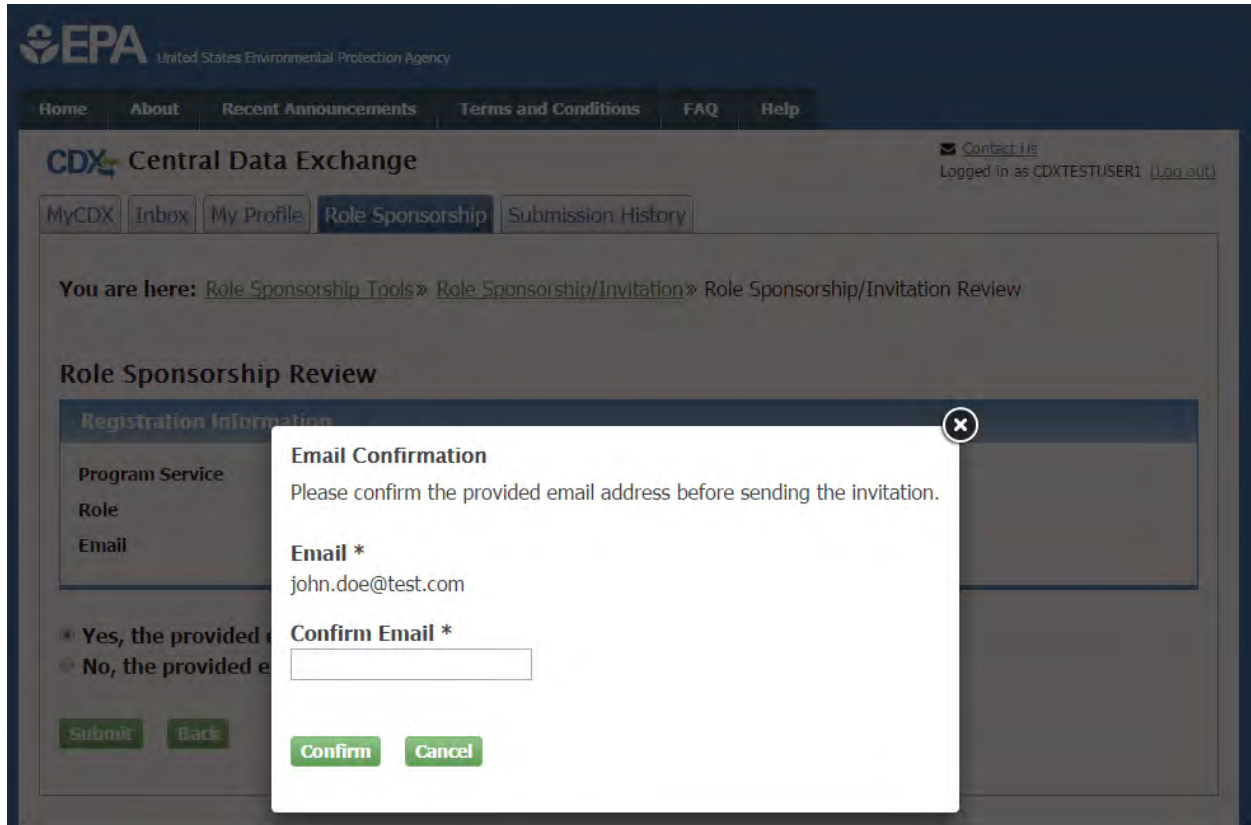
Exhibit 8-4: Email Confirmation Pop-Up Window

Exhibit 8-5 shows a screen capture of the 'CDX Role Sponsorship Request' email that is received by the Submitter:

Mr John Doe with registered email address ███████████████ has requested to sponsor you for the Submitter role.

Program Service: Pesticide Submission Portal
Role: Submitter
Company Number: N/A

You may review this sponsorship and follow the instructions after being redirected to the CDX application.
You may cancel this sponsorship request.

Please do not reply to this message. If you have questions concerning this message, you may contact CDX Help Desk by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995 between Monday through Friday from 8:00 am to 6:00 pm EST/EDT. For International callers, the CDX Help Desk can also be reached at (970) 494-5500.

CDX Registration Homepage
https://dev.epacdx.net

_____
United States Environmental Protection Agency - Central Data Exchange

Exhibit 8-5: CDX Role Sponsorship Request Email – Submitter

Exhibit 8-6 shows the copy of the request that is sent to the Primary Submitter:

Your request was submitted. Below is a copy of the email sent to the submitter you are sponsoring.

Mr John Doe with registered email address ███████████████ has requested to sponsor you for the Submitter role.

Program Service: Pesticide Submission Portal
Role: Submitter
Company Number: N/A

Please do not respond to this message. If you have questions concerning this request, you may contact us by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995 between Monday through Friday from 8:00 am to 6:00 pm EST/EDT. For International callers, the CDX Help Desk can also be reached at (970) 494-5500.

Sincerely
CDX Help Desk

_____
United States Environmental Protection Agency - Central Data Exchange

Exhibit 8-6: Copy of CDX Role Sponsorship Request Email – Primary Submitter

8.2.2   Sponsorship Information

The 'Sponsorship Information' page displays when a potential Submitter clicks the 'review this sponsorship' link within the Submitter sponsorship email. A potential Submitter has the option to log into an existing account, or create a new account.

If a user chooses to create a new account, they should click the 'Create New Account' button on the 'Sponsorship Information – Log-In' page (see Exhibit 8-7).

If a user chooses to log into an existing account, they should select the user ID from the 'User ID' drop-down menu, enter the password, and click the 'Log In' button to log into their CDX account. This displays an additional 'Sponsorship Information' page where a potential Submitter must approve or reject a CDX official's request to view their contact information to sponsor them for the corresponding Submitter role (see Exhibit 8-8).

Exhibit 8-7 shows a screen capture of the 'Sponsorship Information – Log-In' screen:

Exhibit 8-7: Sponsorship Information – Log-In Screen

Exhibit 8-8 shows a screen capture of the 'Sponsorship Information' screen:

Exhibit 8-8: Sponsorship Information Screen

After clicking the 'Approve' button, the Submitter will be navigated to the 'Account Registration' page where they will request access to the role (see

Exhibit **8-9**). The potential Submitter should verify their user information on the 'Account Registration' screen.

Important: The Submitter will not be able to change the company number in the 'Company Number' field. This number is the company number of the sponsor that is sponsoring the Submitter.

Exhibit 8-9 shows a screen capture of the 'Account Registration' screen:

Exhibit 8-9: Account Registration Screen

After clicking 'Request Role Access,' the Submitter will be required to select a current organization or request to add a new organization to submit for (see Exhibit **8-10**).

Note: This user guide can also be accessed via the 'PSP CDX Registration Guide' link on this screen.

Important: The Submitter must select the same company that the Primary Submitter is sponsoring them for.

Exhibit 8-10 shows the 'Organization Info' section.

Exhibit 8-10: Submitter Selection of Organization

After selecting an organization and clicking the 'Submit Request for Access,' button, an email will be sent to the Primary Submitter requesting their approval (see Exhibit 8-11). The Submitter will also receive a copy of this email (see Exhibit 8-12).

Exhibit 8-11 shows a screen capture of the 'CDX Role Sponsorship Request' email that is sent to the Primary Submitter:

Mr Jane Doe with registered email address ████████████████ is requesting your sponsorship for the following Submitter role.

Contact Organization: TestOrg198800
Program Service: Pesticide Submission Portal
Role: Submitter
Company Number: 123

You may review this sponsorship request and follow the instructions after being redirected to the CDX application.
You may cancel this sponsorship request.

Please do not reply to this message. If you have questions concerning this message, you may contact CDX Help Desk by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995 between Monday through Friday from 8:00 am to 6:00 pm EST/EDT. For International callers, the CDX Help Desk can also be reached at (970) 494-5500.

CDX Registration Homepage
https://dev.epacdx.net

_____
United States Environmental Protection Agency - Central Data Exchange

Exhibit 8-11: CDX Role Sponsorship Request Email – Primary Submitter

Exhibit 8-12 shows the copy of the 'CDX Role Sponsorship Request' email that is sent to the Submitter:

Your request was submitted.

Mr Jane Doe with registered email address is requesting your sponsorship for the following Submitter role.

Contact Organization: TestOrg198800
Program Service: Pesticide Submission Portal
Role: Submitter
Company Number: 123

Please do not reply to this message. If you have questions concerning this message, you may contact CDX Help Desk by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995 between Monday through Friday from 8:00 am to 6:00 pm EST/EDT. For International callers, the CDX Help Desk can also be reached at (970) 494-5500.

CDX Registration Homepage
https://dev.epacdx.net

_____

United States Environmental Protection Agency - Central Data Exchange

Exhibit 8-12: Copy of CDX Role Sponsorship Request Email – Submitter

Exhibit 8-13 shows a screen capture of the 'Role Sponsorship Login' screen. The Primary Submitter is navigated to this screen once they click the 'review this sponsorship request' link within their email:

Exhibit 8-13: Role Sponsorship Login Screen

The Primary Submitter should enter their password on the 'Role Sponsorship Login' screen and click the 'Log In' button to log into their CDX account.

Exhibit 8-14 shows a screen capture of the 'Role Sponsorship Review' screen:

Exhibit 8-14: Role Sponsorship Review Screen

Note: The Primary Submitter must select the EPA OPP Company Number and organization that they are sponsoring the Submitter for. This EPA OPP Company Number and organization should match what the Submitter entered when they accepted the sponsorship request.

After clicking the 'Approve' button the Primary Submitter will have to sign an electronic ESA (see
Exhibit **8-15** and Exhibit 8-16).

Exhibit 8-15: Electronic ESA (Scroll 1)

Exhibit 8-16: Electronic ESA (Scroll 2)

After Clicking the 'Sign Electronically' button and clicking 'Accept' in the pop-up window, the Primary Submitter will be presented the 'eSignature Widget' screen.
The Primary Submitter will be required to log in to CDX, answer a secret question, and sign the file by clicking the 'Sign' button.
Exhibit 8-17 displays a screen capture of the 'eSignature Widget' screen.

Exhibit 8-17: eSignature Widget Screen

8.3 Finalizing the Role Sponsorship Process

After completing the 'eSignature Widget Screen,' the Primary Submitter will be navigated back to the 'Role Sponsorship' tab within CDX. The Primary Submitter will also receive two emails. One email will confirm that the Primary Submitter has successfully signed using the CROMERR E-Signature process (see Exhibit 8-19). The other email will indicate that the sponsor letter for the sponsorship request has been completed (see Exhibit 8-18).

You have successfully signed your CDX submission using the CROMERR E-Signature process. To view the details of this CROMERR activity please click here.
This message is being sent to you as confirmation of your submission. If you did not perform this submission please contact the CDX Helpdesk at 888-890-1995.

Exhibit 8-18: Central Data Exchange Sponsorship Request Completed Email – Primary Submitter

The sponsor letter for the following sponsorship request has been completed.

Organization: TestOrg198800
Program Service: Pesticide Submission Portal
Role: Submitter
Company Number: 123

Please do not reply to this message. If you have questions concerning this message, you may contact CDX Help Desk by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995 between Monday through Friday from 8:00 am to 6:00 pm EST/EDT. For International callers, the CDX Help Desk can also be reached at (970) 494-5500.

CDX Registration Homepage
https://dev.epacdx.net

_____
United States Environmental Protection Agency - Central Data Exchange

Exhibit 8-19: CROMERR E-Signature Email

The Submitter will also receive an email indicating that the sponsor letter for the sponsorship request has been completed (see Exhibit 8-20).

The sponsor letter for the following sponsorship request has been completed.

Organization: TestOrg198800
Program Service: Pesticide Submission Portal
Role: Submitter
Company Number: 123

You may log in to complete your account registration associated with this request after being redirected to the CDX application.

Please do not reply to this message. If you have questions concerning this message, you may contact CDX Help Desk by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995 between Monday through Friday from 8:00 am to 6:00 pm EST/EDT. For International callers, the CDX Help Desk can also be reached at (970) 494-5500.

CDX Registration Homepage
https://dev.epacdx.net

_____
United States Environmental Protection Agency - Central Data Exchange

The Submitter should click the 'log in to complete your account registration' link within the email. After clicking this link, the Submitter will be navigated to the 'Role Sponsorship' screen (see Exhibit 8-21).

Exhibit 8-20: Central Data Exchange Sponsorship Request Completed Email – Submitter

Exhibit 8-21: Role Sponsorship Screen

After the Submitter enters their password and clicks the 'Log In' button, they will be navigated to the 'Complete Account' screen (see Exhibit 8-22).

Exhibit 8-22: Complete Account Screen

After pressing the 'Submit' button, the Submitter will be navigated to the 'Identity Verification'
screen (see
Exhibit **8-23**). **Note:** If the Submitter has already passed identity verification for another role,
they will be navigated to the 'CDX Registration: Additional Verification' screen. For guidance
on completing additional verifcation, please reference **Section 5.2**.

Exhibit 8-23: 'Identity Verification' Screen

The Submitter can either choose LexisNexis as a verification option or they can sign a Paper ESA. For more information about identity verification, refer to Section 5.

The Submitter will be navigated to the 'MyCDX' tab within CDX after going through identity verification. If the Submitter did not pass LexisNexis, they will see 'PSP: Pesticide Submission Portal' under the 'Program Service Name' column and 'Submitter' under the 'Role' column. The 'Submitter' role in the 'Role' column will be plain text and will not be clickable (see Exhibit 8-24). Once the Submitter's ESA has been processed and approved, the Submitter will be navigated to the 'CDX Registration: Additional Verification' screen upon logging in to CDX. For guidance on completing additional verifcation, please reference **Section 5.2**. After

completion of the additional verification, the 'Submitter' text will become a blue link under the 'Role' column (see Exhibit 8-25).

Exhibit 8-24: 'MyCDX' Inactive Submitter Role

Exhibit 8-25: 'MyCDX' Active Submitter Role

9   Appendix A - Definitions, Acronyms, and Abbreviations

Acronym	Full Name
CDX	Central Data Exchange
EPA	Environmental Protection Agency
PSP	Pesticdie Submission Portal
ID	User identification
OPP	Office of Pestice Programs
ESA	Electronic Signature Agreement
RMAM	Registration Maintenance Account Manager
PII	Personally Identifiable Information
CROMERR	Cross-Media Electronic Reporting Regulation