Registering as a Certifier

This job aide includes information on how to register as a Certifier for the SPeCS for SIPS program service.

The Certifier is one of the two State Roles in SPeCS for SIPS, which are described below:

1. **Preparer**: The Preparer is the person within a given state organization that is responsible for preparing a plan submission in SPeCS for later certification by an authorized representative of the organization. Preparers can submit draft submission to EPA, but cannot submit official submissions, withdrawals, or supplemental submissions.

2. **Certifier**: The Certifier is the authorized representative of the state organization responsible for signing and submitting official submissions to EPA through SPeCS. Certifiers can create (if desired), modify (if necessary), sign, and submit forms to EPA through CDX.

For more information on the two SPeCS for SIPS State Roles, see the “Overview of State Roles” job aide.

- Accessing the CDX Homepage
- Adding the SPeCS for SIPS Program Service to an Existing CDX Account
- Creating a New CDX Account
- Organization Information
- Confirming Your Account Registration
- Completing an Electronic Signature Agreement
- Completing a Paper ESA
- Registration Notifications
- Support

Accessing the CDX Homepage

1. Access the Central Data Exchange (CDX) home page directly by selecting this URL (or entering it into your browser): [https://cdx.epa.gov/](https://cdx.epa.gov/). The homepage provides you with the following features:

   a. **Log in**: If you already have an existing CDX account, you may log into the system by entering your User ID and Password, and clicking the ‘Log In’ button (see Figure 1). Then proceed to the next section to add the SPeCS for SIPS program service to your account.

   b. **Registration**: If you do not have an account with CDX, click the ‘Register with CDX’ button (see Figure 1) and proceed to [Creating a New CDX Account](#) to begin the CDX registration process.
Adding the SPeCS for SIPS Program Service to an Existing CDX Account

1. On the MyCDX page, select the ‘Add Program Service’ button (see Figure 2).
2. The Edit Account profile screen will appear. Search for the SPeCS for SIPs program service in the Program Service page by entering the program service name in the ‘Active Program Services List’ text box (see Figure 3).

   a. The SPeCS for SIPs program service will be listed within the SPeCS: State Planning electronic Collaboration System category.

**Figure 3: Selecting a Program Service**
4. Select the ‘SPeCS for SIPs’ program service once it appears on the list.
5. You will be automatically redirected to the Role Access Page (see Figure 4). Select the ‘Certifier’ role from the dropdown list on the Role Access page.
6. The ‘State’ field will appear after selecting the ‘Certifier’ role. From the dropdown field, select the state you are affiliated with.
7. Select the ‘Request Role Access’ button to complete adding the role to your account.

**Figure 4: Role Access Page**

8. The Organization Information page will appear. On the Organization Information page (see Figure 5), choose one option from the following:
   a) *Select a Current Organization.* If you already have other CDX Program Services associated with your account, this option will display the list of organizations that you associated with those program services. Select the appropriate organization from the dropdown list to associate with your SPeCS for SIPs role.
   b) *Request to Add an Organization.* This option prompts you to enter keyword(s) to search for the name of the organization you wish to associate with your SPeCS for SIPs role.
      i. If you see your organization in the search results table, click on the appropriate organization ID to select your organization.
ii. If the simple search returns too many results, you may 1) click on the “Use advanced search” at the bottom of the page; or 2) enter new keywords in the search box.

iii. If you cannot locate your organization in the search results, you may click the ‘Request that we add your organization’ link at the bottom of the page. The form will expand and you can enter the name, address, and other information for the new organization.

9. Select the ‘Submit Request for Access’ button.

Figure 5: Organization Information Page

Creating a New CDX Account

1. Go to the CDX Home Page at https://cdx.epa.gov/. To create a new CDX account, click the ‘Register with CDX’ button (see Figure 1).

2. The CDX ‘Terms and Conditions’ screen will be displayed, documenting the terms and conditions. To continue, accept the terms and conditions by selecting the ‘I am this registrant. I will not share my account, and I accept the terms and conditions, above.’ checkbox and the ‘Proceed’ button (see Figure 6).

   a. You may cancel the registration process by selecting the ‘Cancel’ hyperlink. Note that if you decline the terms and conditions, you will not be able to proceed with the registration.
b. Once you have accepted the registration agreement, you are redirected to proceed with the registration process.

**Figure 6: CDX Terms and Conditions**

3. The ‘Request Program Service’ screen displays a list of active program services (see Figure 7). You may filter the active program service list by typing the program service name or related keywords in the text bar.

4. Select the ‘SPeCS: State Planning Electronic Collaboration System’ category from the Active Program Service List by clicking on the list item.

5. Select ‘eSIPS: SPeCS for SIPS’ from the Active Program Service List by clicking on the list item that appears within the selected category.
6. You will be automatically redirected to the Role Access page (see Figure 8). Select the ‘Certifier’ role from the dropdown list on the Role Access page.

7. The ‘State’ field will appear after selecting the ‘Certifier’ role. From the dropdown field, select the state you are affiliated with.

8. Select the ‘Request Role Access’ button to complete adding the role to your account.
Organization Information

1. The User and Organization Information Page will appear. On the ‘Part 1: User Information’ section of the ‘User and Organization’ page, enter your user information in all of the required fields marked with an asterisk (see Figure 9).

   a. The ‘Security Question’ and ‘Security Answer’ selections are used for identifying authentication in the event you forget your password and need to reset it. The answers you provide to the security questions are case insensitive.

   **Note:** It is important that you carefully note your input for the ‘User ID’ and ‘Password’ fields, as you are prompted for this information during the SPeCS for SIPs submission process and will need to provide an exact match for authentication.
2. On the ‘Part 2: Organization Info’ section of the ‘User and Organization’ page, search for the name of your existing organization (see Figure 10).
a. If you see your organization in the search results table, click on the appropriate organization ID to select your organization.
   
i. If the simple search returns too many results, you may use the advanced search option or choose to search again with modified keyword(s).

   ii. Once an existing organization has been selected, you are required to enter an email and phone number with the option of entering a phone number extension or fax number (see Figure 11).

**Warning:** Search results only include “verified” organizations (i.e. organizations that have been verified electronically or has an approved paper Electronic Signature Agreement) unless the search is specifically conducted using the ‘Organization Id’.

This means that organizations created by Certifiers with approved ESAs are returned in search results if the search is conducted by organization name. Organizations created by Preparers will not be returned in the identical search since Preparers are not required to have an ESA.

All users within your state do not need to be registered to the same organization in order to be able to view and/or submit SIPs within your state.

**Note:** You must register with an email address that ends in .gov or .us in order to register as a Certifier. If you do not have an email address that ends in gov or .us, please reach out to your EPA point of contact for alternative methods of registering as a Certifier.
b. If you cannot locate your organization in the search results, you may create a new organization by clicking the ‘request that we add your organization’ link (see Figure 10). Clicking the link will take you to the Organization Information page where you can enter required organization details (See Figure 12).
3. Select the ‘Submit Request for Access’ button to proceed with registration.
   a. A confirmation page will appear stating that you will receive an email from CDX to activate your account shortly (see Figure 11).
Confirming your Account Registration

1. Access your email account and open the email sent from CDX with the subject of ‘CDX and SPeCS for SIPs Registration Email Verification’ (see Figure 12).

2. Select the hyperlink within the email, which will direct you to CDX. From the CDX homepage, log in to activate your account.

3. The ‘Identity Verification’ screen will be displayed to complete the Electronic Signature Agreement (ESA) process.
Completing an Electronic Signature Agreement

1. You are taken to the ‘Identity Verification’ screen to complete the Electronic Signature Agreement (ESA) process (see Figure 13).
   
   a. You are required to complete an electronic signature agreement prior to accessing the SPECS for SIPS program service for the first time. You may submit your ESA electronically or mail a paper-version of the ESA to your appropriate EPA Region.

   Note: The ‘Identity Verification’ screen will provide two options: 1) Signing and submitting the Electronic Signature Agreement (ESA) electronically which requires identity proofing through LexisNexis or 2) a paper-based version of the ESA which does not require identity verification through LexisNexis.

   Submitting your ESA electronically allows for instant verification.

   Mailing a paper-based ESA may take up to 2 weeks to process and verify.

   b. For electronic submittals of the ESA, the CDX Web application provides an identity verification service called LexisNexis, which is a third-party service that verifies the user's identity, organization information and association to the organization.

      i. The LexisNexis service collects additional Personally Identifiable Information (PII) that CDX does not store. You must provide the necessary PII for LexisNexis to complete the identity validation for electronic submission.
c. If you choose to mail your paper-based ESA to your EPA Region for review and approval, you can skip the remaining steps in this section and refer to the ‘Submitting a Paper ESA’ section in this job aide.

Figure 13: Identity Verification Page

2. If you submitting your ESA electronically, enter information as necessary on the LexisNexis window to complete the identity validation and select the ‘Proceed with Verification’ button.
   a. If your identity proofing failed, you will be forced to sign the paper ESA.
3. Select from the twenty (20) questions that appear in the dropdown, choose five (5) unique questions and provide five (5) unique answers (see Figure 14).

   a. You are required to answer one (1) of these five (5) questions upon submitting any SPeCS for SIPs submission files.

   b. If you pass LexisNexis validation and choose to sign the ESA electronically, the application verifies that the CROMERR security questions and answers have been approved.

   c. If CROMERR security questions and answers have been approved, you are directed to the ESA.

   Figure 14: CROMERR Signature Questions

4. Click the ‘Save Answers’ button after providing five (5) secret questions and five (5) answers (see Figure 14).

   a. A confirmation email notifying you that you have provided answers to five signature questions is sent to your organization email and to your CDX Inbox.

   b. If you need to electronically sign an ESA later, you are required to provide your CROMERR questions and answers before signing electronically.

   c. If you forget your CROMERR questions and answers, contact the CDX Helpdesk for assistance in resetting them.
5. (OPTIONAL) Enter your mobile number for use during the electronic signature process. Select the ‘Send’ button to receive a text message from CDX (see Figure 15).

   a. The SPeCS for SIPs system supports mobile number verification. This feature allows you to receive a code to sign submissions, in lieu of answering a CROMERR question.

   Please note: You may skip this step by selecting the ‘Skip Mobile Number Setup’ hyperlink at the bottom right of the screen. If you choose to skip mobile number verification, proceed to step 7.

   b. You will receive a text message from CDX that contains a PIN number (see Figure 16).

**Figure 15: Mobile Number Verification**

![Mobile Number Verification](image)

**Figure 16: CDX Verification Pin**

![CDX Verification Pin](image)
6. Enter the CDX PIN Number and select the ‘Verify’ button to verify your mobile number (see Figure 17).

**Figure 17: PIN Number Verification**

![PIN Number Verification Image]

a. If you have not received a text message from CDX, select the ‘click here’ hyperlink to modify your mobile number.

b. If the PIN number is correct, you will receive a text message from CDX that the specified phone number has been added to your account.

c. You will also receive a confirmation email notifying you that a mobile number has been associated with your account.

7. After reviewing the ESA, select the ‘Sign Electronically’ button to proceed (see Figure 18).
8. In compliance with CROMERR standards, you are required to agree to the certification statement. Select the ‘Accept’ button in the modal (see Figure 19) to continue.
9. The CROMERR eSignature Widget will appear (see Figure 20).
   1. Enter your password to confirm your account.
   2. As a second security measure, enter the answer to a secret question associated with your account.
   3. Once you have completed the first two steps, select the ‘Sign’ button to sign your ESA.
   4. You will receive a notification from CDX indicating that you have successfully completed the CROMERR E-Signature process.
Completing a Paper ESA

**Warning:** The paper ESA process may take up to 2 weeks to complete.

1. From the Identity Verification page, select the ‘Paper Verification’ hyperlink to sign a paper ESA in lieu of an electronic signature agreement by (see Figure 13).

2. A separate page will be displayed where you can view the paper CDX ESA. Review the ESA, then select the ‘Sign Paper Form’ button on this page to open the ESA in a separate window to print (see Figure 21).

![Figure 21: Paper CDX Electronic Signature Agreement](image)

3. From the paper ESA window, select the ‘Print to Mail’ button to print the paper ESA (see Figure 22).

4. Provide a wet-ink signature on the paper ESA and mail the ESA to your appropriate regional contact referenced on the ESA.
5. Once an EPA Regional Reviewer has received, reviewed, and processed your paper ESA, you will receive an email message from CDX stating that your account has been activated. This process may take up to two weeks.

6. Once your account has been activated, log into CDX using your previously created user ID and password.

7. You will be prompted to provide CROMERR 20-5-1 questions and answers to complete your registration (see Figure 16).

**Figure 22: CDX Electronic Signature Agreement**

![CDX Electronic Signature Agreement](image)

**Note:** You may choose to discontinue the registration process by clicking the ‘Cancel’ button. If you do not complete either the electronic or paper ESA, you must contact your Registration Maintenance Account Manager (RMAM) to obtain access to the program role requested.

If you do not know your RMAM contact information, contact the U.S EPA SPeCS for SIPs system RMAM at 919-541-5550 or south.mia@epa.gov.
Registration Notifications

1. After completing the registration process, you are provided confirmation of successful registration (see Figure 23).
   a. If you chose the paper ESA option, you will not see the notification shown in Figure 25 until after EPA has reviewed and approved your ESA.

   **Figure 23: CDX Registration Confirmation Email**

2. Upon logging in to CDX or navigating to the ‘MyCDX’ screen, the Certifier role is listed under the ‘Services’ section of the screen.

   Please note: All ‘eSIPS: SPeCS for SIPs’ roles should have an active hyperlink and the 👤 icon next to them, signifying that the role is active.

Support

If you have questions related to submission development, please contact your EPA Regional Contact, as listed on your state landing page.

If you have questions related to CDX or the SPeCS for SIPs program service, please contact the CDX Help Desk at helpdesk@epacdx.net or by telephone at 888-890-1995.