

Quick Reference Guide

Assign Supports to a Primary Form U

Pre-requisites

1. User is registered in CDX and has a role as a **Primary Authorized Official** in the Chemical Data Reporting application.
2. The Primary Authorized Official or Primary Agent/Consultant has created a form.
3. For guidance about creating a form see Quick Reference Guide Creating & Submitting a Primary Form.

Step 1: Assign Supports to a Primary Form

1. Log in to CDX at <https://cdx.epa.gov/>.
2. Click the **Primary Authorized Official** link.
3. Select **TSCA Chemical Data Reporting (CDR) 2020** from drop-down on the Chemical Information Submission System page.
4. Click the **[OK]** button
5. Click the **User Management** option in the action bar header
6. The **Reporting Year** is auto selected to 2020.
7. Select the appropriate **Site** from the dropdown menu.
8. Determine whether to assign or un-assign a support to the form
 - a. To assign a support:
 - i. Hold down the **Ctrl** or **Shift** keys on the keyboard and click the desired support(s) from the Unassigned column
 - ii. Click the **[Add >>]** button to assign
 - b. To un-assign a support:
 - i. Hold down the **Ctrl** or **Shift** keys on the keyboard and click the desired support(s) from the Assigned column
 - ii. Click the **[<< Remove]** button to un-assign
9. Click the **[Save]** button after each assignment

If a form has not been created for a site, a 'You have not yet started a form for this site. Navigate back to the Home screen and click the 'Create New Form' button to start the form to assign/un-assign users to this site.' pop-up message appears and the 'Add,' 'Remove,' and 'Save' buttons are disabled.

Troubleshooting Information

1. **Why are no users available in the 'Unassigned' box?**
 - a. Ensure the user has registered in CDX and has added the Site you wish to assign him to, to his profile.
2. **How do I identify the role the users will have in my form?**
 - a. A parenthesis next to the user name indicates the role they have registered for (e.g. PS = Primary Support). For information about how to register for those roles see Quick Reference Guide - User Roles and Access.
3. **What user role should I select from the 'Unassigned' box if I need someone to modify the form but not submit?**
 - a. See the User Role Matrix section below for reference.

4. How many users can I add to a form?

- a. There is no limit for how many users can be assigned to a form. However, given that access to a form requires the use of a single passphrase, we recommend treating the form as any other secured and confidential form. Sharing the passphrase with too many people may become a security risk. It is recommended that only people directly involved with the creation and submission of the form have access to the passphrase and form.

5. How do I assign a Primary Agent/Consultant to my form?

- a. The process for assigning a Primary Agent/Consultant is done via the **Role Sponsorship** tab in CDX. For additional details see the Quick Reference Guide – User Roles and Access on the **Resources** section of the **Home** page under the **Quick Reference Guides**.

Quick Reference Guide

User Role Matrix

User Role Selection

Reference the following when identifying the correct user role for which an individual should register.

1. **Primary Authorized Official:** A Primary Authorized Official has the ability to create, amend, unlock, and submit the primary Chemical Data Report (CDR) form electronically to EPA. The Primary Authorized Official also has the ability to assign Supports (including Agents/Consultants) to individual sites.
2. **Primary Agent/Consultant:** A Primary Agent/Consultant has the ability to create, amend, and/or unlock the primary Chemical Data Report (CDR) form electronically to EPA. The Primary Agent/Consultant has the ability to submit only amended forms to EPA.
3. **Primary Support:** A Primary Support has the ability to modify any unlocked primary form that he/she is assigned to by the Authorized Official.

<u>Legend</u>	Primary AO	Primary Agent / Consultant	Primary Support
X=Can Perform Function			
	Contracting & Producing Company & Manufacturer		
	US & non-US	US & non-US	US & non-US
Primary Form			
Create Primary Form	X	X	
Creates Passphrase	X	X	
Generate Joint Submission Unique ID	X	X	
Generate Producing Company Unique ID	X	X	X
Edit Primary Form	X	X	X
Submit an original Primary Form	X		
Unlock Form Submission (Create an amendment)	X	X	
Submit an Amendment of a Form	X	X	
Assign Supports	X		