



## TRI-MEweb Reference Guide 4

### How to Add TRI-MEweb and Add a Facility Profile to a New Preparer's CDX User Account.

#### **Instructions for preparers who need a new Central Data Exchange (CDX) User account**

**Role:** Preparer – Person who will be preparing TRI forms for submission but is not authorized to certify.

**Application Access:** If you have never used CDX to transmit your TRI forms to EPA, you will need to create a new CDX user account to access the TRI-MEweb application for Forms R and/or A preparation.

**TRI Facility Access:** Access key and TRI Facility Identification Designator (TRIFID) assigned to your facility's location.

#### **Instructions on how to register at the CDX website and add the TRI-MEweb application in your new CDX user account.**

1. Go to <http://cdx.epa.gov> to create your new CDX user account.
2. Read the **Warning and Privacy** notices.
3. On the CDX login page click on the button: "**Register with CDX**" See Figure 1.

Start

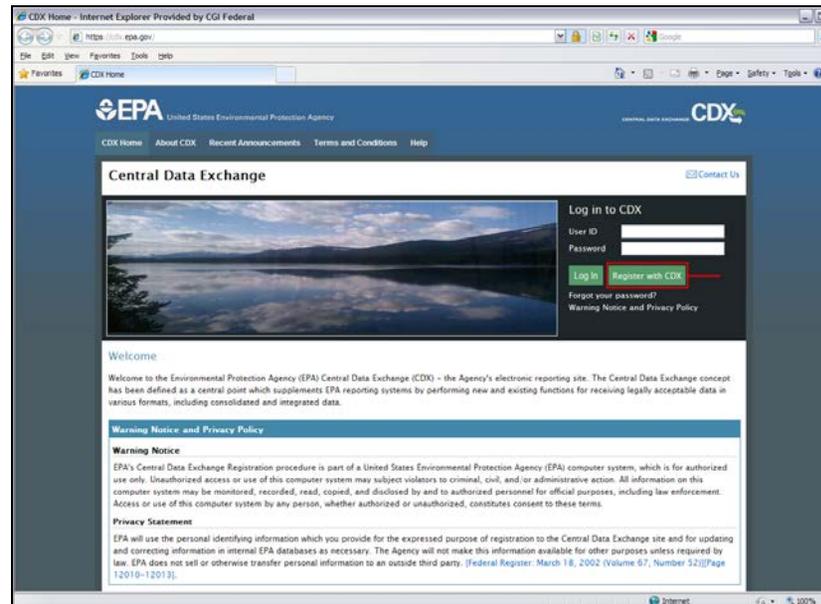


Figure 1: CDX Log In web page.



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4. Review the Terms and Conditions, select "**I Accept**", and **Click** on the "**Proceed**" button.
5. You will then be forwarded to step 1 of 4 in the Core CDX Registration Process, the **Active Program Services List**. In the search field, enter "TRI," "TRI-MEweb," "EPCRA 313," or other TRI-related search terms and select "**TRIMEweb: Toxic Release Inventory Made Easy Web**" from the Active Program Services List, as shown in Figure 2.

CDX Help Desk: 888-890-1995 | (970) 494-5500 for callers from Puerto Rico and Guam  
EPA Home | About CDX | Frequently Asked Questions | Privacy and Security Notice | Terms and Conditions | Contact Us

#### Did you know?

Your MyCDX account can host up to 64 CDX applications. TRI-MEweb is one of them.

Figure 2: Adding TRI-MEweb application to your CDX user account.

6. You will be directed to the "**Request Role Access**" page. On the "**Request Role Access**" page, select the "**Preparer**" Role from the dropdown menu. Click "**Request Role Access**".
7. Next, provide your user and organization information on the **two-part** registration page. As shown in Figure 3, you will provide your name and other user information in Part 1 of this page; enter a **user ID, title, name, password**, and three **secret questions/answers** for identification verification.
  - a. **NOTE:** EPA strongly encourages you to document this information and store it in a safe place, as it will be used to reset your password if you are ever locked out of your CDX user account.



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8. On Part 2 of the **"Provide User and Organization Information"** page, you will also be required to search for and select an organization associated with your TRI Form submissions using the general or advanced search options (see Part 2 of Figure 3).
  - a. **NOTE:** If your organization is not found, you may click **"request CDX add your organization"** and manually enter your organization information.
9. After you have selected an organization or requested that your organization be added, provide your personal email address and phone number.

- Part 1**
- User information
  - 3 password reset questions and answers

- Part 2**
- Organization information
  - If no organization found click on "Request CDX Add Your Organization" button

The screenshot shows a registration page with a progress bar at the top: 1. Request Program Service (checked), 2. Request Role Access (checked), 3. Provide User and Organization Information (active), 4. Confirmation. Below the progress bar, the page is titled "Registration Information" and shows "Program Service: Toxic Release Inventory Made Easy Web" and "Role: Certifying Official". A note states "Essential information is marked with an asterisk(\*)". The page is divided into two parts: "Part 1: User Information" and "Part 2: Organization Information". Part 1 includes fields for User ID, Title, First Name, Middle Initial, Last Name, Suffix, Password, and Re-type Password, along with three security questions. Part 2 includes a search box for organizations and a "Search" button.

**Figure 3: Provide user and organization information.**



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10. After all information has been entered click "**Submit Request for Access**". You will land on the **Confirmation** page which will inform you that you will soon receive a confirmation message at the email address you provided in step 10, asking you to follow a link to activate your user account.
11. Once you click the link in the email, you will be required to login again. This completes the registration process and grants access to the **TRI-MEweb** application via the "TRI-MEweb" hyperlink found on the **MyCDX** page. See Figure 4.

#### Launch TRI-MEweb

- Link is activated
- Make sure pop-blocker is disabled on your browser

The screenshot shows the EPA CDX Central Data Exchange interface. At the top, there is a navigation bar with links for CDX Home, About CDX, Recent Announcements, Terms and Conditions, FAQs, and Help. The user is logged in as TUTORIAL1. The main content area is titled "Central Data Exchange" and includes a "MyCDX" section with tabs for "Inbox (1)", "My Profile", and "Submission History". Below this, there are two main sections: "Services" and "News and Updates". The "Services" section has a sub-section "Manage Your Program Services" and contains a table with the following data:

Status	Program Service Name	Role(s)
	TRIMEweb: Toxic Release Inventory Made Easy Web	TRI-MEweb

Below the table is a green "Add Program Service" button. The "News and Updates" section shows "No news/updates." At the bottom of the page, there is a footer with contact information and additional links.

**Figure 4: TRI-MEweb application ready to be accessed.**

#### Instructions on how to assign facilities to a Preparer's CDX user account.

11. Click on the "**TRI-MEweb**" link to open the TRI-MEweb application in a new browser window. To continue, select the option that applies to you:
  - a. **Option 1: Has your location reported to TRI in previous years?** If your answer is Yes, go to Step 12, otherwise, if your answer is no, answer the next question.
  - b. **Option 2: Are you uncertain if your location has ever reported to TRI in previous years?** If your answer is yes, go to step 17. If your location have reported in prior years, you will need to find your assigned TRIFID. Call CDX helpdesk for assistance in finding your assigned TRIFID.



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### How to Add TRI-MEweb and Add a Facility Profile to a New Preparer's CDX User Account.

#### Did you know?

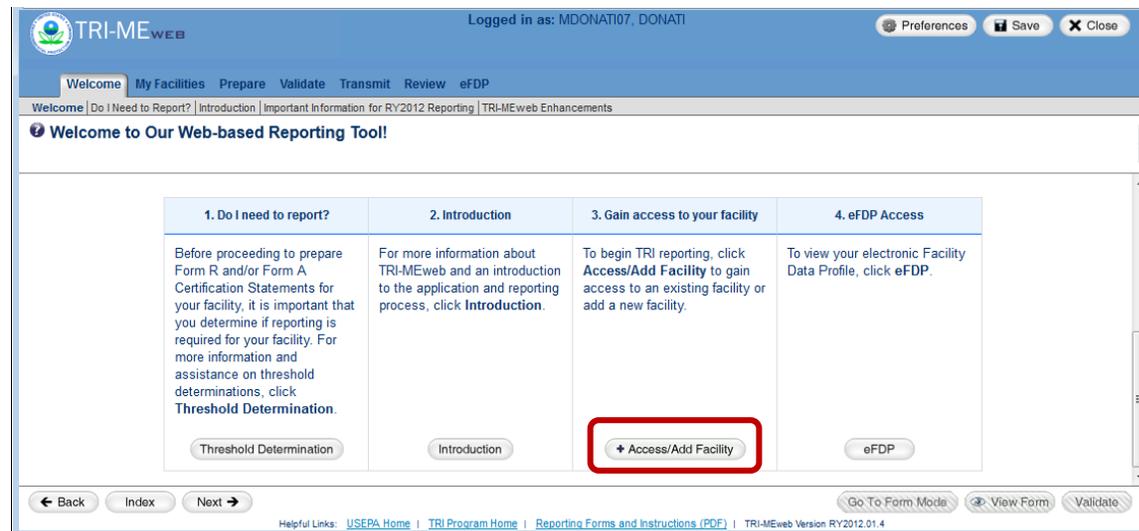
The preparer cannot certify any TRI Forms. However, a certifying official role can do both tasks- prepare and certify forms.

#### Did you know?

Users with a preparer role will NEVER see a **Certify** tab in TRI-MEweb.

#### **Option 1: Instructions for gaining access to an existing facility profile in TRI-MEweb.**

12. You have successfully opened the TRI-MEweb application from CDX. You are now ready to establish access to an existing facility data profile.
13. **NOTE:** TRI preparers may gain access to an existing facility in TRI-MEweb by obtaining the facility's access key. Access keys can be obtained by calling the CDX Helpdesk at (888) 890-1995. Additionally, EPA may send the access key to the facility's technical contact in an email from CDX just before the updated TRI-MEweb application is released each year.
14. From the "**Welcome**" page, click the **+Access/Add Facility** button listed under option 3. See Figure 5.
  - a. **NOTE:** You can also access and or add facilities from the "**My Facilities**" tab located at the top of **TRI-MEweb**.



**Figure 5: Welcome page with +Access/Add Facility button.**

15. Next, select the radio button beside **Option 2** and enter your facility's access key in the Access Key field on the "**Enter Facility's Access Information**" page as shown in Figure 6. Then, click the **Next** button. Or, select the radio button beside **Option 1** and enter your facility's TRIFID and Technical Contact Information from a Prior Year Submission, as shown in Figure 7. Then click, **Next**.



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**Option 2**

- Enter access key here

TRI-ME WEB Logged in as: MDONATI07, DONATI

Welcome My Facilities Prepare Validate Transmit Review eFDP

My Facilities | Third-Party Load Tool

### Enter Facility's Access Information

Before you can begin to work on your facility's TRI reports and/or view electronic Facility Data Profile (eFDP) information, you must gain access to your facility's data. Please select an access option, provide the requested data, and click **Next**.

If your facility last reported in Reporting Year 2004 (or a prior reporting year), contact the TRI Data Processing Center (phone: 703-227-7644) so they can create an Access Key for your facility.

If your facility is new for Reporting Year 2012 and reported TRI data via paper form, please select the second radio button below (Option 2: Access Key) to view electronic Facility Data Profile (eFDP) information.

Option 1: Enter your TRIFID and the following two items from a prior year's TRI Form for this facility:

TRI Facility ID:

Technical Contact Name:

Technical Contact Phone Number:

Option 2: Enter your facility's Access Key

Access Key:

I will be transmitting reports for a facility that has not previously transmitted TRI data

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Figure 6: Select option 2 if you have the access key for the facility.



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### How to Add TRI-MEweb and Add a Facility Profile to a New Preparer's CDX User Account.

**Option 1**  
Enter your TRIFID and Technical Contact Information from a Prior Year Submission

Logged in as: MDONAT07, DONATI

Welcome | My Facilities | Prepare | Validate | Transmit | Review | eFDP

My Facilities | Third-Party Load Tool

### Enter Facility's Access Information

Before you can begin to work on your facility's TRI reports and/or view electronic Facility Data Profile (eFDP) information, you must gain access to your facility's data. Please select an access option, provide the requested data, and click **Next**.

If your facility last reported in Reporting Year 2004 (or a prior reporting year), contact the TRI Data Processing Center (phone: 703-227-7644) so they can create an Access Key for your facility.

If your facility is new for Reporting Year 2012 and reported TRI data via paper form, please select the second radio button below (Option 2: Access Key) to view electronic Facility Data Profile (eFDP) information.

**Option 1: Enter your TRIFID and the following two items from a prior year's TRI Form for this facility:**

TRI Facility ID: 2822WMMNGMY155FA

Technical Contact Name: \_\_\_\_\_

Technical Contact Phone Number: \_\_\_\_\_

**Option 2: Enter your facility's Access Key**

Access Key: \_\_\_\_\_

**I will be transmitting reports for a facility that has not previously transmitted TRI data**

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**Figure 7: Enter the Technical Contact Name and Phone Number from your prior year TRI form to load your facility profile into TRI-MEweb.**

16. Regardless of using Option 1 or Option 2 to gain facility access (see Figures 6 and 7), you will now need to select the appropriate radio button as shown in Figure 8. If the facility information shown is correct, choose the **Yes** radio button.
  - a. **NOTE:** If the facility information shown does not correspond to your facility, choose the **No** radio button. Then, click the **Next** button. If needed, call the CDX Helpdesk for help obtaining the correct access key.



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### How to Add TRI-MEweb and Add a Facility Profile to a New Preparer's CDX User Account.

Logged in as: MDONATI07, DONATI

Preferences Save Close

Welcome My Facilities Prepare Validate Transmit Review eFDP

My Facilities | Third-Party Load Tool

### Confirm Facility

You have entered valid information for the following TRI facility:

**TRIFID:** 2822WMNGMY155FA  
**Facility Name:** Manage My TRIFIDs Page  
**Address:** 1550 Facility Way  
Charlotte, NC 28226

Is this the correct facility? Make a selection below, and click **Next**.

Yes, this is the correct facility  
 No, this is not the correct facility

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Figure 8: Confirm Facility information is correct.

17. If you indicated that the facility's information was correct, you will be directed to the "**Access Granted**" page as shown in Figure 9. You have now been granted access to the facility and may begin editing facility information, preparing chemical forms, or viewing submission history. You may also proceed to add a new certifying official or preparer to access the facility's profile.



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Logged in as: MDONATI07, DONATI

Welcome | My Facilities | Prepare | Validate | Transmit | Review | eFDP

My Facilities | Third-Party Load Tool

**Access Granted**

USEPA has granted your TRI-MEweb user account access to the following TRI facility:

Access Key: T38FF397  
TRIFID: 2822WMNGMY155FA  
Facility: Manage My TRIFIDs Page; 1550 Facility Way, Charlotte, NC 28226

Print

The following table lists all TRI-MEweb users that currently have access to this facility's data.

Name	CDX User ID	Email Address	Certifier?	ESA Status	Refresh ESA Status	Access Notes
Martha Donati	MDONATI07	<a href="mailto:martina.donati@cqifederal.com">martina.donati@cqifederal.com</a>	No	--		Entered Access Key on 05/28/2013 11:53 AM
Martha Donati	MDONATI07	<a href="mailto:martina.donati@cqifederal.com">martina.donati@cqifederal.com</a>	Yes	ESA Approved, TRIFID Not Signed		Entered TRIFID on 05/22/2013 12:56 PM

The certifier status above was last updated on 05/28/2013 11:50AM EST.

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#### Authorized Users

- If no CDX User ID listed, CDX user account has not been created
- Find out if ESA is approved under **ESA Status** column.

Figure 9: If access is granted to the existing facility profile, as the preparer, you will be able to see who has access to your account in the table shown here.

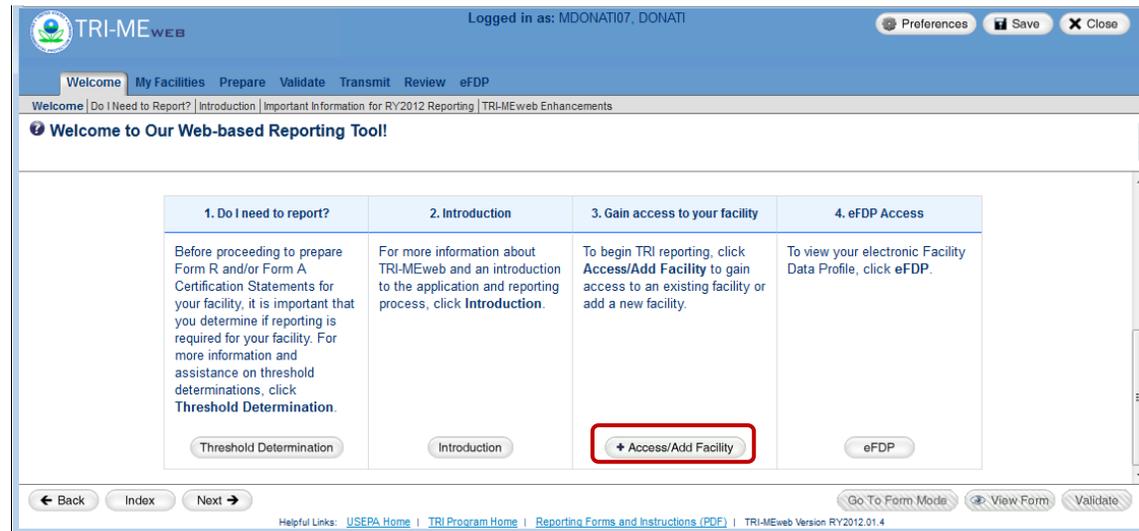
#### Option 2: Instructions for creating a new facility profile in TRI-MEweb.

18. From the "Welcome" page, click the +Access/Add Facility button listed in option 3. See Figure 10.
  - a. **NOTE:** You can also access and/or add facilities from the "My Facilities" tab located at the top of TRI-MEweb.



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**Figure 10: Welcome page with +Access/Add Facility button.**

19. Next, select the radio button beside the third option on the "Enter Facility's Access Information" page as shown in Figure 10. Then, click the **Next** button.



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Logged in as: MDONATI07, DONATI

Preferences Save Close

Welcome My Facilities Prepare Validate Transmit Review eFDP

My Facilities | Third-Party Load Tool

### Enter Facility's Access Information

Before you can begin to work on your facility's TRI reports and/or view electronic Facility Data Profile (eFDP) information, you must gain access to your facility's data. Please select an access option, provide the requested data, and click **Next**.

If your facility last reported in Reporting Year 2004 (or a prior reporting year), contact the TRI Data Processing Center (phone: 703-227-7644) so they can create an Access Key for your facility.

If your facility is new for Reporting Year 2012 and reported TRI data via paper form, please select the second radio button below (Option 2: Access Key) to view electronic Facility Data Profile (eFDP) information.

Option 1: Enter your TRIFID and the following two items from a prior year's TRI Form for this facility:

TRI Facility ID:

Technical Contact Name:

Technical Contact Phone Number:

Option 2: Enter your facility's Access Key

Access Key:

I will be transmitting reports for a facility that has not previously transmitted TRI data

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#### Option 3

Remember that TRIFIDs are location-specific. Change in ownership does not change a facility's TRIFID.

**Figure 11: Select option 3 if you are uncertain if your facility has reported in prior years or do not have their access key.**

20. Next, enter your facility's information on the "**Request a TRIFID**" page as shown in Figure 12. Then, click the **Next** button.



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Logged in as: MDONATI07, DONATI

Preferences Save Close

Welcome My Facilities Prepare Validate Transmit Review eFDP

My Facilities | Third-Party Load Tool

### Request a TRIFID

New Facilities; Change of Address

**Step 1.** If your facility has submitted a Form R or Form A in any prior reporting year, a TRI Facility Identification Number (TRIFID) has already been assigned to your facility and you should **not** request a TRIFID. If you have questions regarding your facility's TRIFID, please contact the CDX Help Desk toll free at 1-888-890-1995 (or via e-mail: [helpdesk@epacdx.net](mailto:helpdesk@epacdx.net)), your Regional TRI Program representative, or utilize [Envirofacts](#) to look up your TRIFID.

The TRIFID is established when the first TRI report is submitted by a facility at a particular location. The TRIFID is then retained by the facility even if the facility changes name, ownership, production processes, SIC or NAICS codes, etc. A company that moves to a location previously assigned a TRIFID should use the TRIFID originally assigned to that location. Establishments of a facility that report separately should all use the same TRIFID assigned to the facility. You should only request a TRIFID below if 1) this is the first time your facility has ever reported to TRI or 2) there has been a change in physical address (i.e., street address) at your facility.

To request a TRIFID, first enter your facility name and location information below and click **Next**.

**Facility Name:** My New TRI Facility

**Address:** 1234 Test Drive Lane

**City:** Houston **State:** TX **ZIP Code:** 77024 -

**County:** Harris

**Federal Facility?**

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Figure 12: Enter your facility information.

21. Next, verify that your facility does not already exist in TRI-MEweb by reviewing the list of facilities that may be presented on the "Confirm New TRIFID Request" page as shown in Figure 12.



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TRI-ME WEB Logged in as: MDONATI07, DONATI Preferences Save Close

Welcome My Facilities Prepare Validate Transmit Review eFDP

My Facilities Third-Party Load Tool

### Confirm New TRIFID Request

Step 2: Please verify that your facility has not already been assigned a TRIFID in the search results. If no TRIFID has been assigned to your facility, click **Next**.

<b>Name:</b> My New TRI Facility
<b>Street:</b> 1234 Test Drive Lane
<b>City/State/ZIP Code:</b> Houston, TX 77024
<b>County:</b> Harris
<b>Federal Facility?:</b> No

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**Figure 13: Verify that a TRIFID doesn't already exist for your facility location (facility names can be edited later).**

- NOTE:** If the information entered for your facility has already been created for locations with similar addresses and matching ZIP Codes, a table will display at the bottom of the page and list the similar facilities. See Figure 14.
- If the correct facility is already listed, select it and click **Next**. You will be returned to the "**Enter Facility's Access Information**" page where you will need to enter the Technical Contact's Name and Phone Number as it was reported on a prior year's TRI Form for the corresponding facility as shown in Figure 7. This information is required to verify authorized access to facility profile. Then, click the **Next** button.
- Next, confirm the facility's information and click the **Next** button.



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TRI-ME<sub>WEB</sub> Logged in as: MDONATI07, DONATI Preferences Save Close

Welcome My Facilities Prepare Validate Transmit Review eFDP

My Facilities | Third-Party Load Tool

### Confirm New TRIFID Request

Step 2: Please verify that your facility has not already been assigned a TRIFID in the search results. If no TRIFID has been assigned to your facility, click **Next**.

Name: My New TRI Facility  
Street: 1234 Test Drive Lane  
City/State/ZIP Code: Houston, TX 77024  
County: Harris  
Federal Facility?: No

The table below displays TRIFIDs that have already been created for locations with matching ZIP Codes. Please review the list and ensure that a TRIFID does not already exist for this facility. If you are able to locate an existing TRIFID for your location, please select the radio button and click **Next**. This will return you to a previous page where you will be asked to provide additional information to gain access to the facility.

Please note that TRIFIDS are assigned to specific locations and never change, even if the facility's ownership changes. The TRI DPC will move certified submissions from a new TRIFID to an existing TRIFID, if one is identified.

If you are unable to locate an existing TRIFID for your location, click **Next** to request a TRIFID.

Facilities 1 - 1 of 1.

Select	TRIFID	Facility Name	Street	City	State	ZIP Code
<input type="radio"/>	77024NDRFB71000	ENDURO SYSTEMS INC.	7100 OLD KATY RD	HOUSTON	TX	77024

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Figure 14: Similar facilities listed on the Confirm New TRIFID Request page.

22. You should now be on the "**Access Granted**" page where you have been granted access to the facility profile and may begin preparing chemical forms. See Figure 15. **You are ready to begin your TRI forms!**



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The screenshot shows the TRI-MEweb interface. At the top, it says "Logged in as: MDONATI07, DONATI". Below the navigation bar, there is a message: "Access Granted". The message states: "Your facility has been successfully added to the TRI-MEweb system and it has been assigned the TRIFID displayed below. Your user account has also been granted access to this facility. Other TRI-MEweb users may gain access to this facility with the following Access Key: T63EA92C. Please note this Access Key and share it only with individuals who you would like to have access to this facility's data in TRI-MEweb." A red box highlights the following information:

USEPA has granted your TRI-MEweb user account access to the following TRI facility:

Access Key: T63EA92C  
TRIFID: 7702WMYNWT1234T  
Facility: My New TRI Facility; 1234 Test Drive Lane, Houston, TX 77024

Below this, there is a table listing all TRI-MEweb users that currently have access to this facility's data.

Name	CDX User ID	Email Address	Certifier?	ESA Status	Access Notes
Martha Donati	MDONATI07	<a href="mailto:martha.donati@caifederal.com">martha.donati@caifederal.com</a>	No	--	Entered TRIFID on 05/28/2013 12:10 PM

The certifier status above was last updated on 05/28/2013 11:50AM EST.

At the bottom of the page, there are navigation buttons: Back, Index, Next, Go To Form Mode, View Form, and Validate. There is also a footer with helpful links: USEPA Home, TRI Program Home, Reporting Forms and Instructions (PDF), and TRI-MEweb Version RY2012.01.4.

Begin preparing your TRI Forms!

Figure 15: Verify TRI-MEweb has created your access key and TRIFID. Please print and save for future use.