# Office of Transportation and Air Quality (OTAQ) Fuels Programs Registration User Guide

Version 4.01

United States Environmental Protection Agency

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## Version 4.01

Compliance Division
Office of Transportation and Air Quality
U.S. Environmental Protection Agency

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# 1 Introduction

This document is the User Guide for the OTAQ Fuels Program Registration (OTAQReg) online application. It describes the processes a user must follow to register; update their user profile; associate to companies, as well as create, view, and edit companies.

If you have any questions about the content, format, or policies for the Office of Transportation and Air Quality (OTAQ) please reference the Fuels Program website at http://www.epa.gov/otaq/fuels/index.htm.

If you have any general or technical questions related to the Central Data Exchange (CDX) you may contact any of the following:

- Telephone - Person-to-person telephone support is available from the CDX Help Desk 8:00 am to 6:00 pm EST. Call our toll-free line at 888-890-1995.
- Email - Send e-mail to Technical Support at helpdesk@epacdx.net with “Technical Support” in the Subject line.

If you have any questions relating to fuels programs registration, reporting, or OTAQReg, please contact the EPA Fuels Programs and EMTS Support Line: support@epamts-support.com.

# 2 Registration

The following sections describe how to register for the Fuels Programs Registration (OTAQReg) application.

## 2.1 CDX Registration

The OTAQReg application is hosted by the Central Data Exchange (CDX). CDX is the system that EPA has provided to all programs to standardize and centralize the reporting functions and data submissions that are required of the various EPA regulated communities. In order to access OTAQReg, users must first be registered users of CDX.

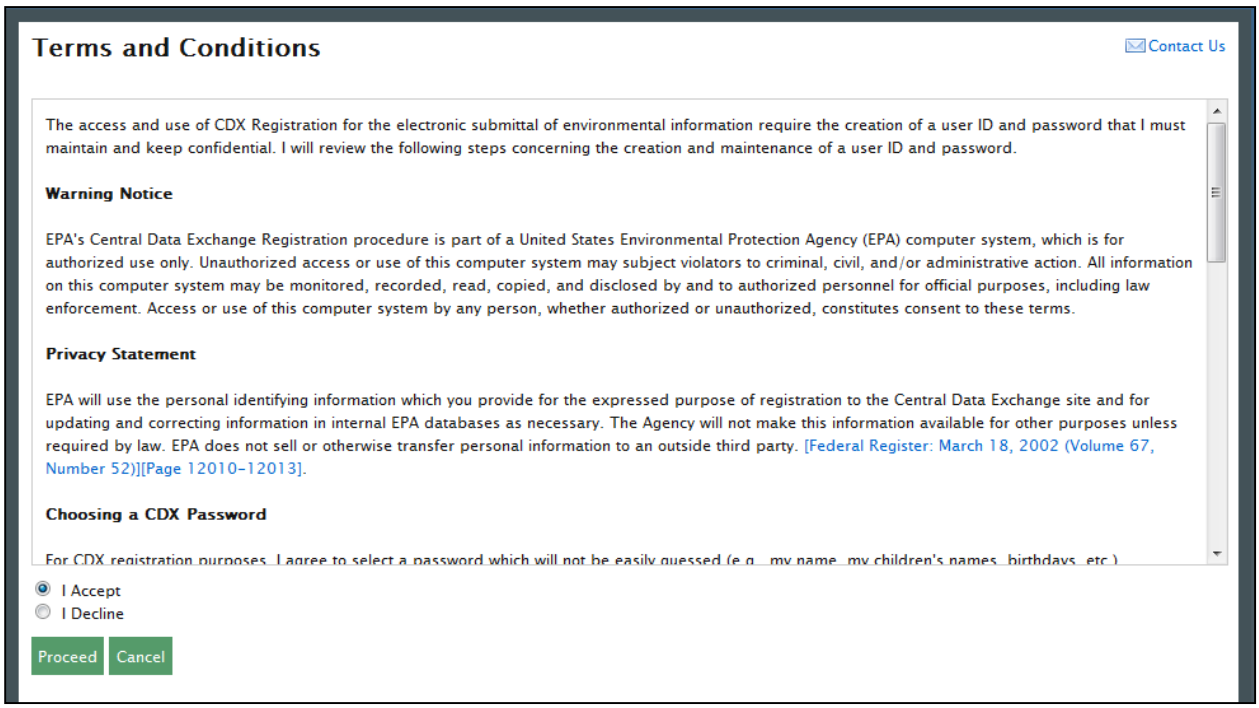
Registration for the OTAQReg application is open to all CDX users. If you are an existing CDX user, please refer to Section 2.3.

## 2.2 OTAQReg Registration for New CDX Users

If you do not have an existing CDX user account please go to the following URL and complete your CDX Registration: https://cdx.epa.gov/Registration/Terms.

Figure 2-1 displays the Terms and Conditions page.

**Figure 2-1 Terms and Conditions**

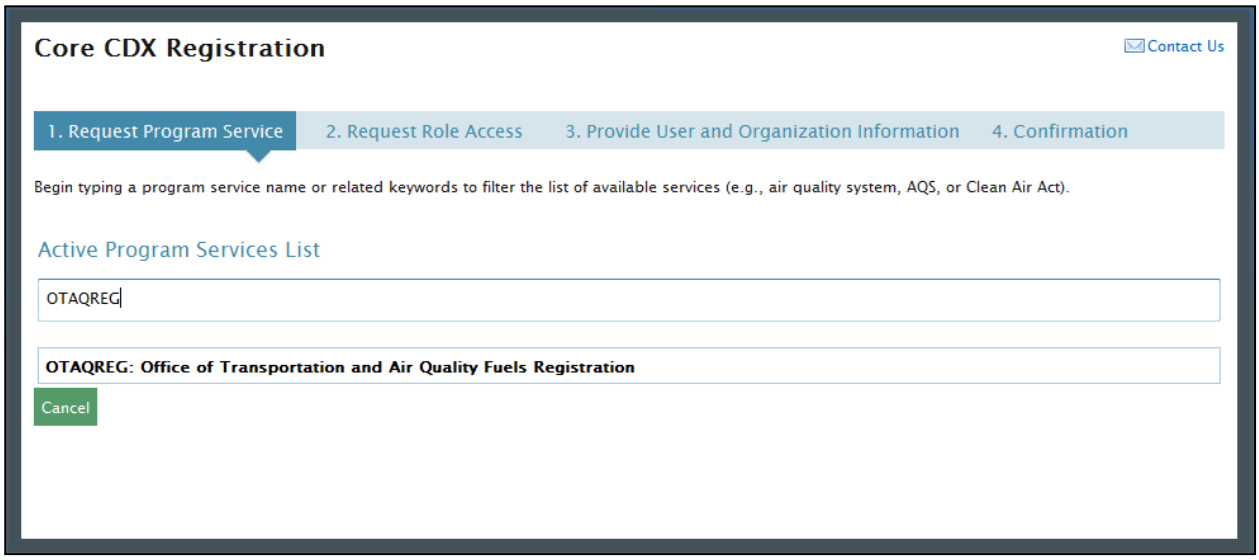



After accepting the Terms and Conditions, you will see the Request Program Service page. This page will display the full list of CDX program services, make sure to select "OTAQREG: Office of Transportation and Air Quality Fuels Registration", as shown in Figure 2-2. You can do this by either typing OTAQReg in the text field or scrolling down through the list of program services.

**Note:** Users should not register for multiple CDX accounts.

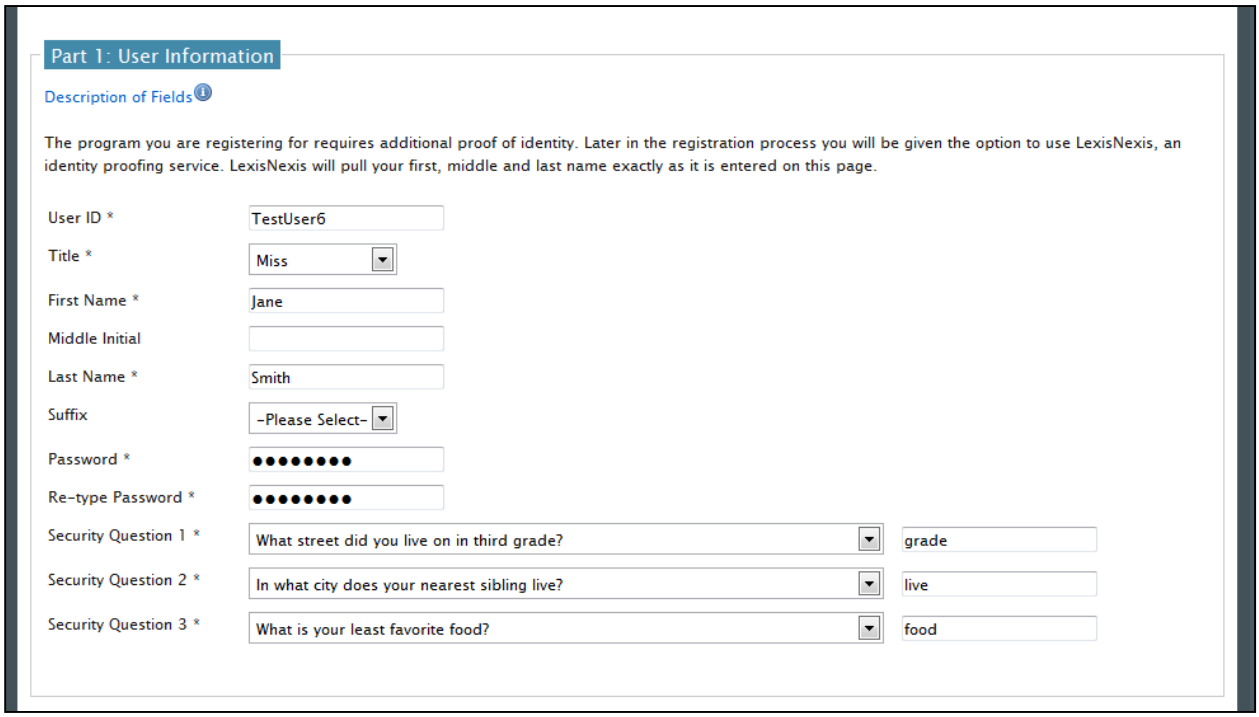
If you are an existing CDX user, please refer to Section 2.3.

**Figure 2-2 Add Program**



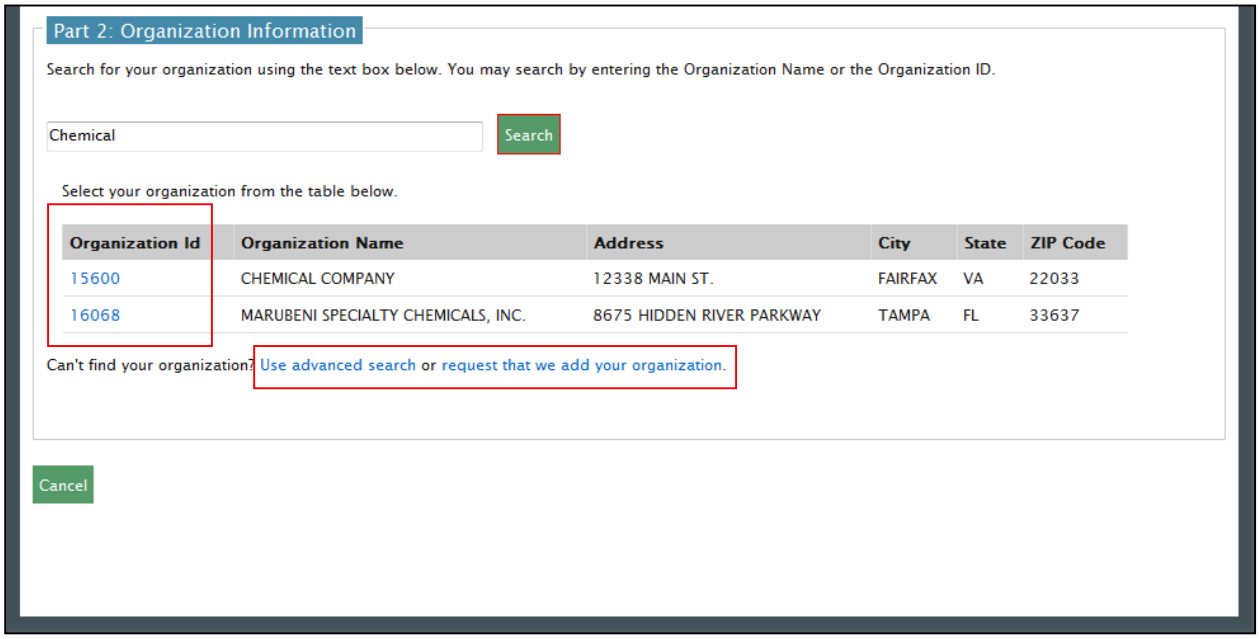

Click on the hyperlinked name to select the program service and navigate to the next step in registration. The Provide User and Organization Information page will display. The first part of the page is shown in Figure 2-3.

**Figure 2-3 Part I User Information**




Enter your personal information and select three security questions. Scroll down to complete the Organization Information section, as shown in Figure 2-4.

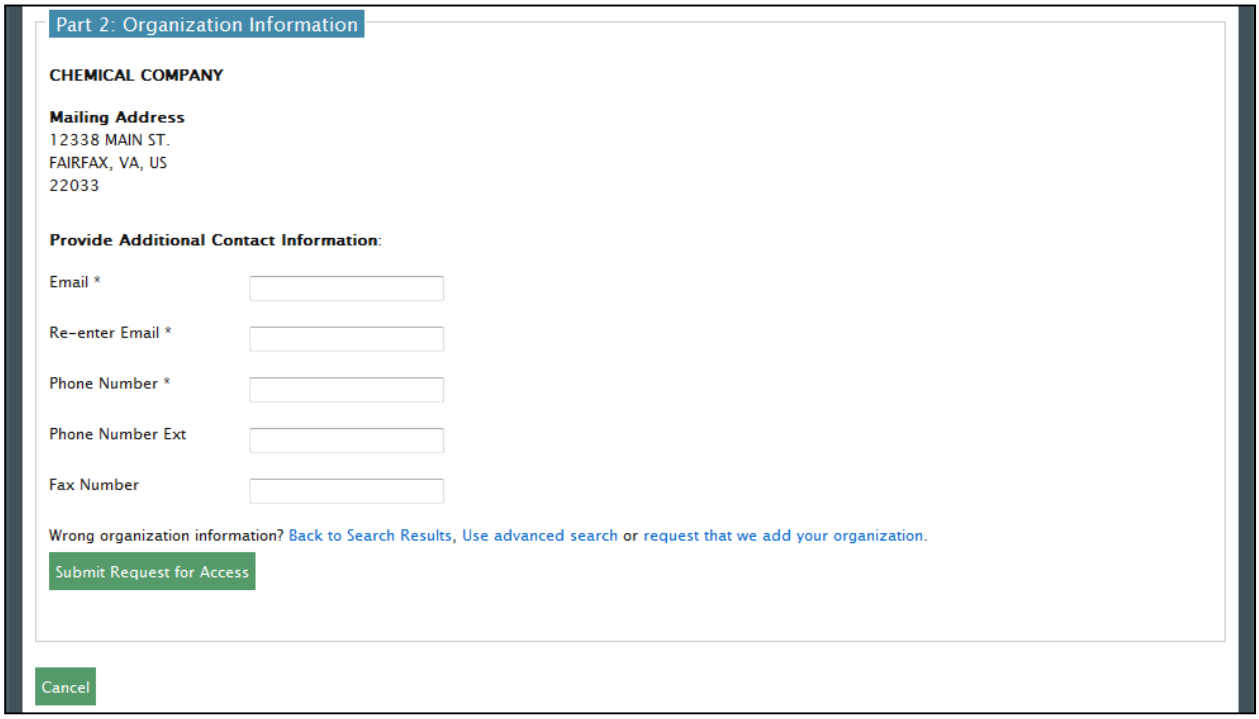
**Figure 2-4 Part 2 Organization Information – Organization Search**




Enter an organization name and click the "Search" button. Matching search results will display in a table below. If you do not see your organization you can try the advanced search or create a new organization through the links located directly below the search results table.

Select your organization from the table by clicking on the hyperlinked Organization ID. Once you have selected an organization, additional fields will display, as shown in Figure 2-5 Part 2 Organization Information.

**Figure 2-5 Part 2 Organization Information**

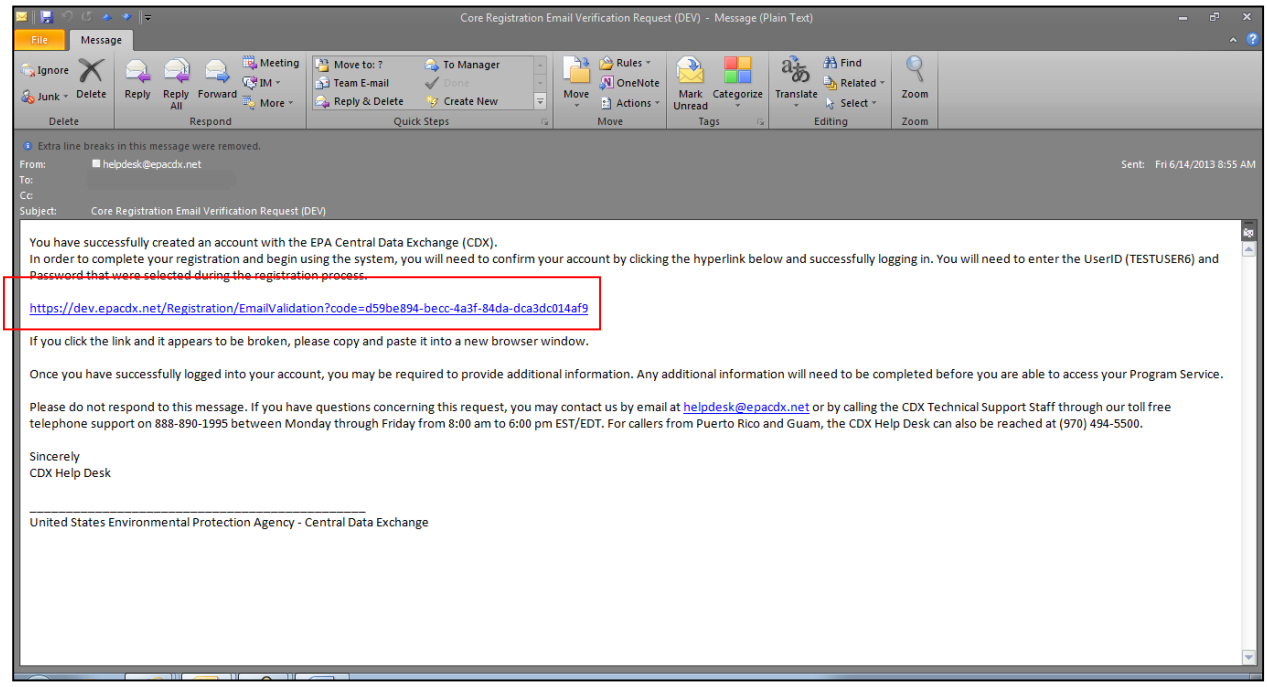



Enter your email address and phone number in the fields provided. Click the "Submit Request for Access" button. Figure 2-6 will display.

**Figure 2-6 Confirmation**

After receiving this confirmation message you will need to check your inbox for an email from the CDX Help Desk. This email will contain a URL to continue through registration, as shown in Figure 2-7.

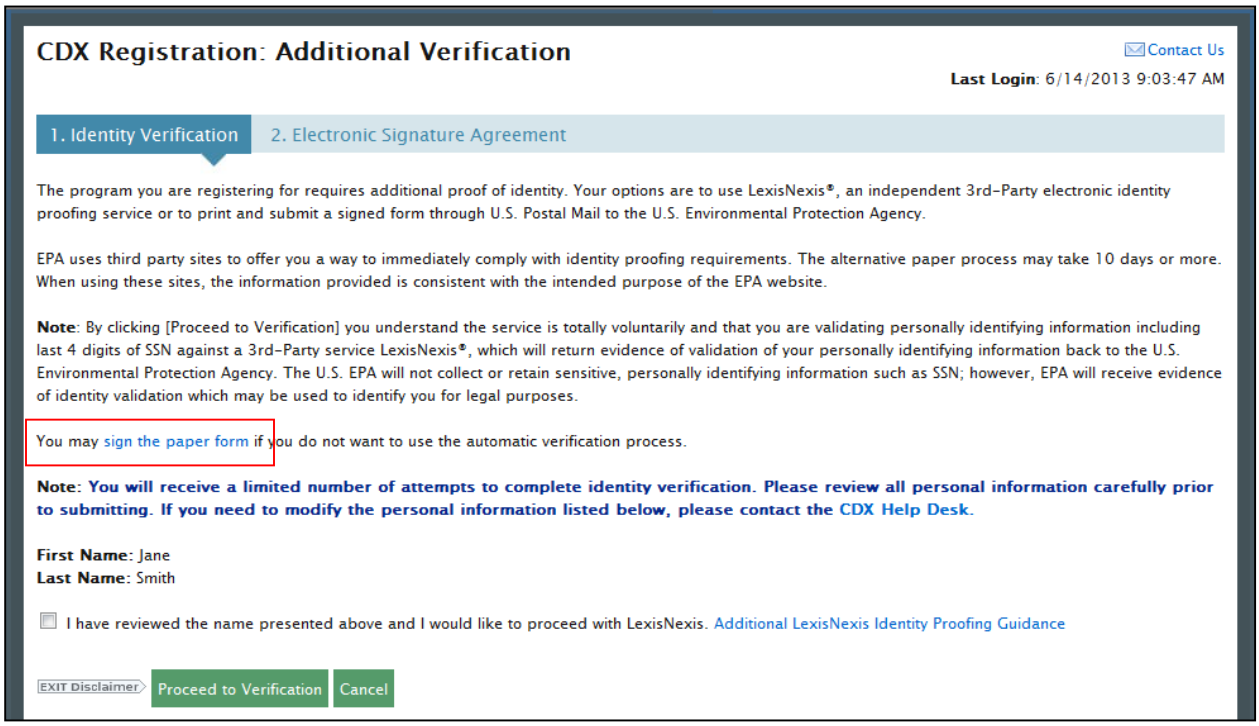
**Figure 2-7 Core Registration Email Verification Request**




Click on the hyperlink provided in the email. Clicking on this link will open a new browser window displaying the CDX log-in page. Enter your log-in credentials created during the registration process and click the “Log-in” button.

After logging into CDX you will be taken to the Identity Verification page, as shown in Figure 2-8.

**Figure 2-8 Identity Verification Page**




This page will provide you with two options: (1) use LexisNexis Identity Proofing to electronically validate your identity, allowing you to electronically sign an Electronic Signature Agreement (ESA) or (2) move forward to print, sign and mail in a paper ESA. Section 2.2.1 will take you through the process of completing LexisNexis and electronically signing your ESA. Section 2.2.2 will take you through the process of printing, signing and mailing in your paper ESA.

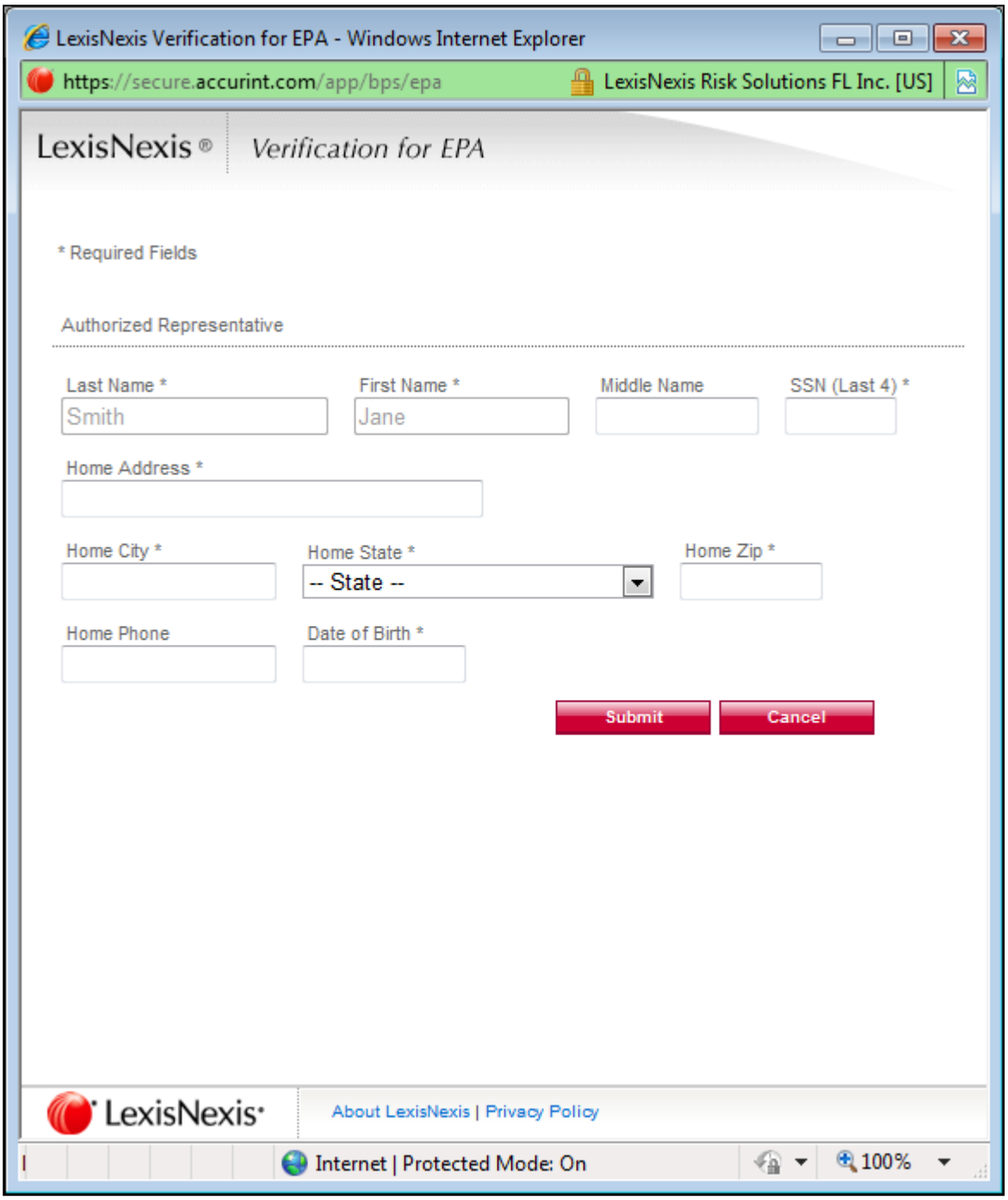
### 2.2.1 Proceed to LexisNexis

This section will take you through the registration steps if you choose to use the LexisNexis Identity Proofing process.

If you choose to proceed with LexisNexis, you will need to review all of the information provided on the Identity Verification page, as shown in Figure 2-8 above. After you have reviewed the information and verified your first and last name, check the checkbox and click the “Proceed to Verification” button.

LexisNexis Identity Proofing will be completed in a separate pop-up window. The first page will display an acknowledgement statement. Click the “OK” button. The next screen will require you to enter personal information. Figure 2-9 displays the LexisNexis pop-up window and required fields.

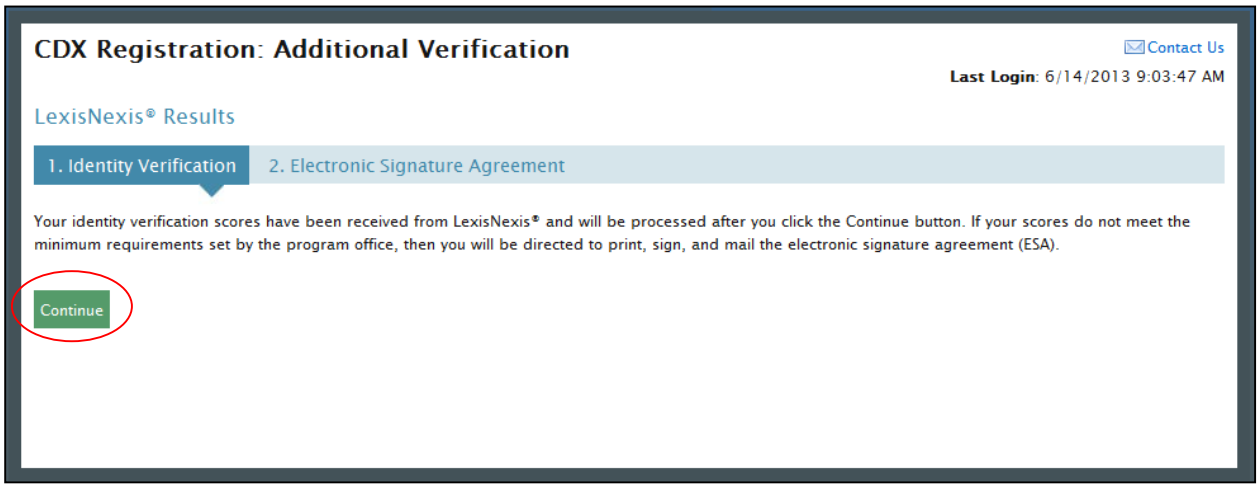
**Figure 2-9 LexisNexis**




After entering information in each field, click the "Submit" button. After completing this step, the LexisNexis pop-up window will display a confirmation message. Click the "OK" button to close the pop-up window and return to the CDX application.

**Note:** The LexisNexis pop-up window will pre-populate your first and last name with the information entered during core registration. These fields will be read-only.

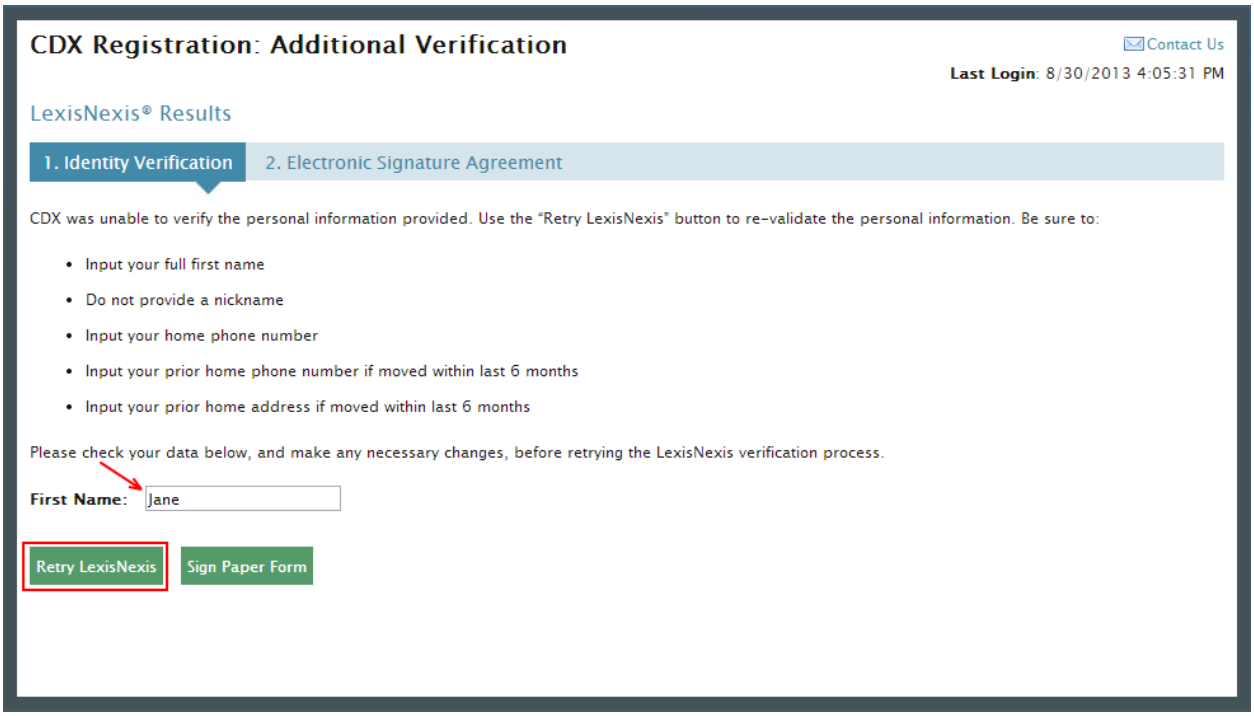
**Figure 2-10 LexisNexis Results**




Click the "Continue" button to process your LexisNexis score and proceed with registration. Figure 2-10 displays the Identity Verification page. If you are successfully identity proofed by LexisNexis, you will be taken to the Challenge Questions and Answers page, as shown in Figure 2-12. If you are not successfully identity proofed by LexisNexis you will be taken to the Electronic Signature Agreement page to print, sign and mail in your ESA.

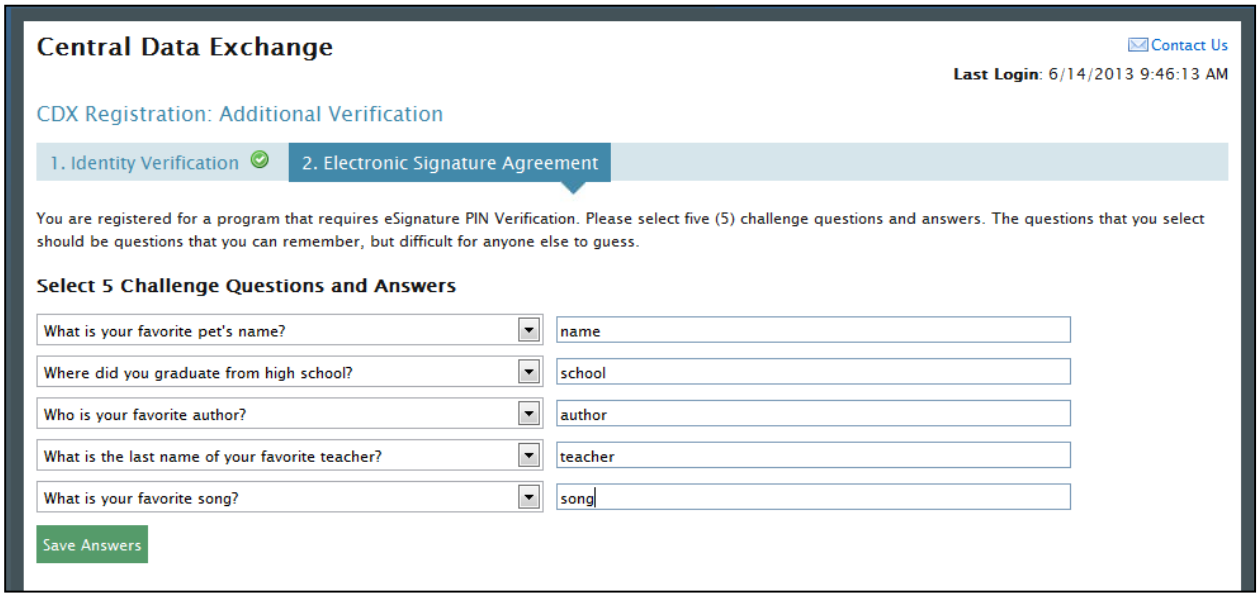
In some cases, you may be eligible to retry LexisNexis validation. If you are eligible for this retry, you will be taken to the Retry LexisNexis page where you can launch the pop-up window once again. You will also be presented with the opportunity to verify or edit your first name, as shown in Figure 2-11. The opportunity to edit your first name will only be presented to you as long as you do not have another CDX role with a status of "Awaiting ESA." At this point you may also choose to opt-out of the LexisNexis identity proofing by clicking the "Sign Paper Form" button.

**Figure 2-11 Retry LexisNexis**




Click the "Retry LexisNexis" button. You will then be returned to the Identity Verification Page, as seen in Figure 2-8, and may begin your verification again. LexisNexis retries may be attempted up to five times before the identity proofing will be considered unsuccessful.

**Figure 2-12 20-5-1 Challenge Questions and Answers**




Once you have answered your 20-5-1 Challenge Questions you will need to click the "Save Answers" button, as seen in Figure 2-13, to be taken to the electronic version of the Electronic Signature Agreement. From this page you will click the "Sign Electronically" button, as shown in Figure 2-13.

**Figure 2-13 Electronic ESA**

**U.S. Environmental Protection Agency**
**ELECTRONIC SIGNATURE AGREEMENT**

In accepting the electronic signature credential issued by the U.S. Environmental Protection Agency (EPA) to sign electronic documents submitted to EPA's Central Data Exchange (CDX), and as a representative for:

**Electronic Signature Holder Company Information**

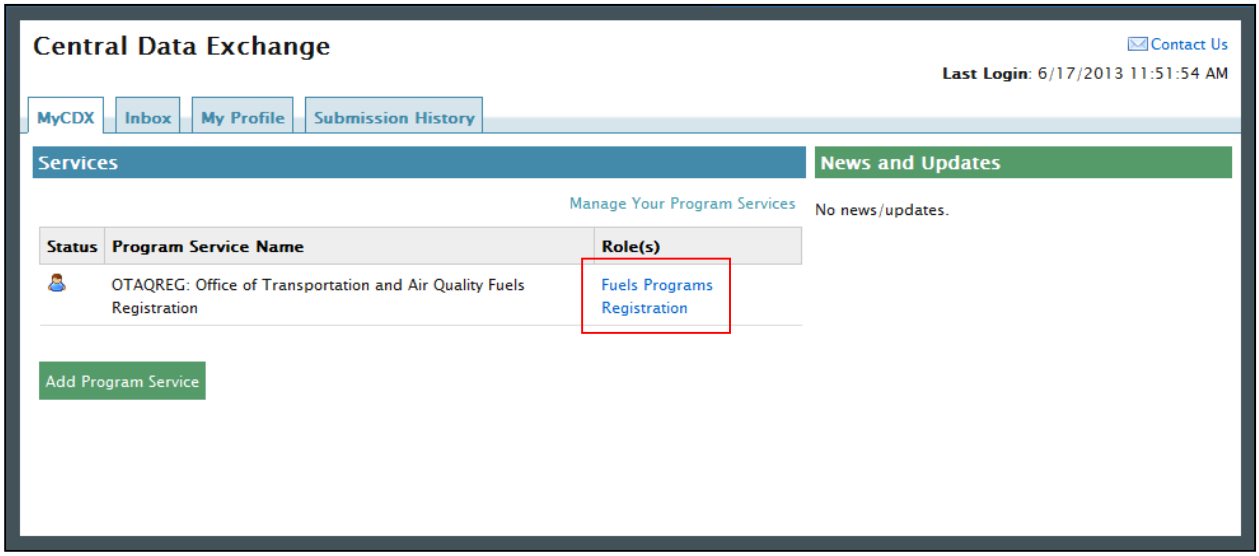
| | |
|---|---|
| Organization Name: | CGI FEDERAL |
| Address: | TEST<br>test |
| City, State, Zip: | TEST, VA 00000 |
| Province: | |
| Country: | US |
| Phone Number: | (345) 654-7437 |
| E-mail Address: | J.Smith@chemicalco.com |
| Registrant's Name: | Jane Smith |

Sign Electronically | Cancel

C pop-up window, which allows you to
co l prompt you to enter your CDX
pa lick the "Sign" button. Please reference
A ons on signing electronically.

A directed to the MyCDX Home page.
Y nk to open the OTAQReg application, as
s

**- me Page**



### 2.2.2 Print and Sign CDX Electronic Signature Agreement

This section will take you through the registration steps if you choose to print, sign and mail a paper ESA.

If you choose to opt-out of LexisNexis or you are not successfully identity proofed by LexisNexis you will be taken to the Electronic Signature Agreement page to print, sign and mail in your ESA. Figure 2-15 displays the paper version of the Electronic Signature Agreement.

**Figure 2-15 Paper ESA**

**U.S. Environmental Protection Agency**
**ELECTRONIC SIGNATURE AGREEMENT**

In accepting the electronic signature credential issued by the U.S. Environmental Protection Agency (EPA) to sign electronic documents submitted to EPA's Central Data Exchange (CDX), and as a representative for:

**Electronic Signature Holder Company Information**

| | |
|---|---|
| Organization Name: | CGI FEDERAL |
| Address: | TEST<br>test |
| City, State, Zip: | TEST, VA 00000 |
| Province: | |
| Country: | US |
| Phone Number: | (345) 654-7437 |
| E-mail Address: | J.Smith@chemicalco.com |
| Registrant's Name: | Jane Smith |

Sign Paper Form Cancel

Clicking the “Sign Paper Form” button will trigger a pop-up window, which allows you to print the ESA.

Print, sign and mail the CDX ESA to the Fuels Program Helpdesk at one of the following mailing addresses:

Commercial Delivery:
U.S. Environmental Protection Agency
William Jefferson Clinton Building - North
Mail Code 6405A, Room 6520V; (202) 343-9038
1200 Pennsylvania Ave NW
Washington, DC 20004

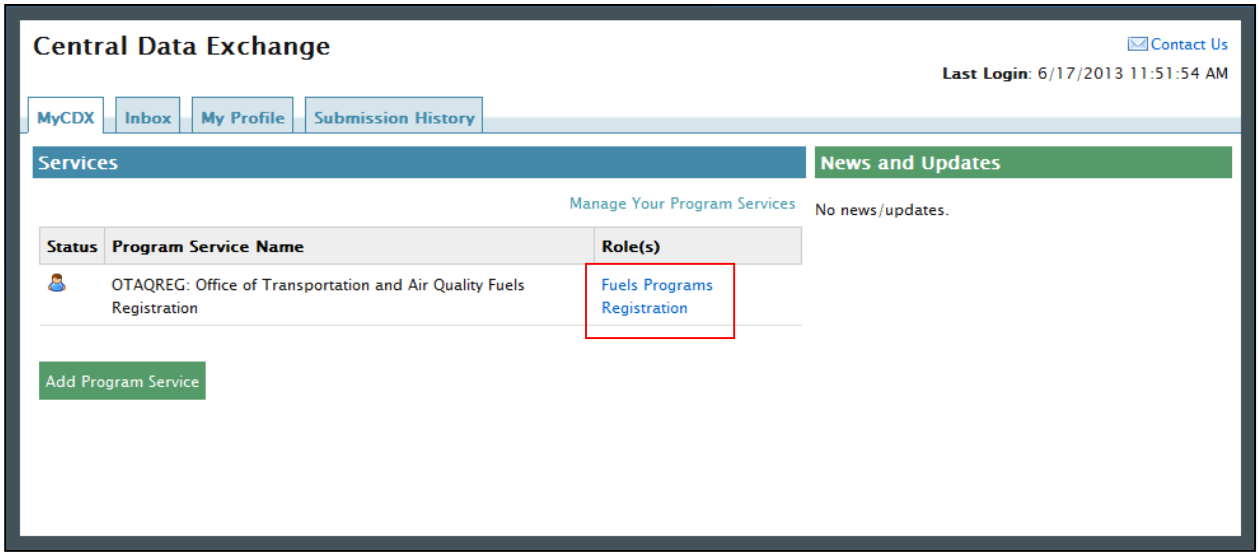
US Mail:
U.S. Environmental Protection Agency
Mail Code 6405A
1200 Pennsylvania Ave NW
Washington, DC 20460

**Note:** When using a commercial delivery service, do not use the U.S. mail address (or vice versa) as your mail will be delayed, may be returned to you, or may even never arrive at our offices. Be aware that sending materials via US Mail will require an irradiation process and could possibly delay delivery.

Paper ESAs will be processed and activated by EPA. Once your ESA has been activated you will be able to complete the 20-5-1 Challenge Questions, as seen in Figure 2-12.

New companies, company associations, company updates and RCO updates submitted within the OTAQReg application will not be accepted until your CDX ESA is received by the Fuels Program. If you have any questions regarding the status of your ESA, please contact the EPA Fuels Program Support Line by sending an email to support@epamts-support.com.

**Figure 2-16 MyCDX Home Page**




You will be given the "Fuels Programs Registration" program service link, as seen in Figure 2-16.

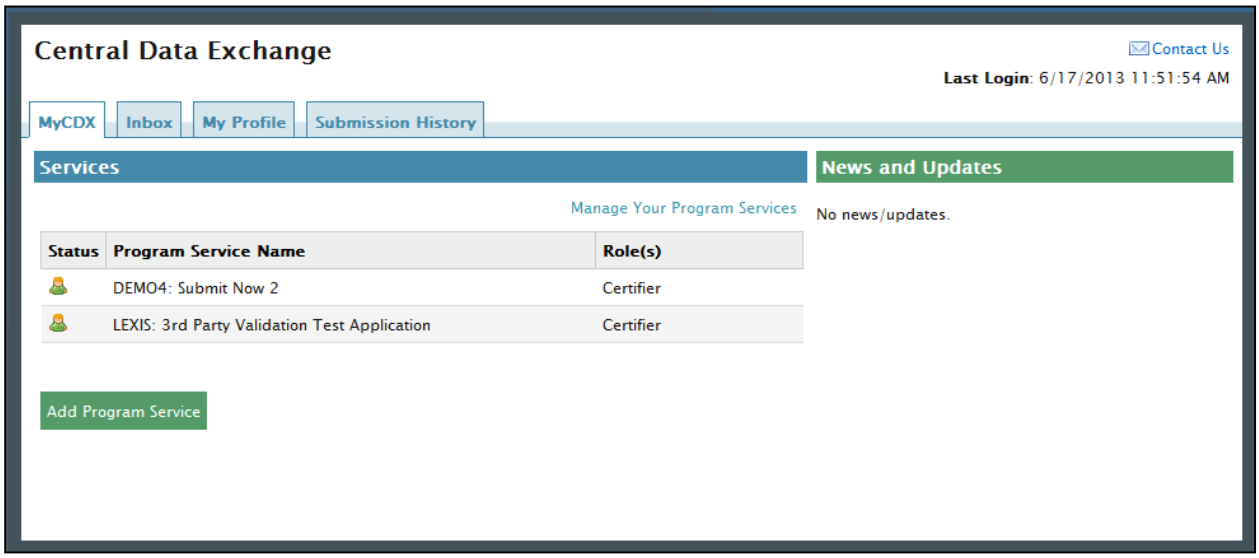
Existing CDX users should refer to Section 2.3 for further details.

## 2.3 OTAQReg Registration for Existing CDX Users

This section is only for existing CDX users who do not have OTAQReg access. New CDX users should refer to Section 2.2 for further details.

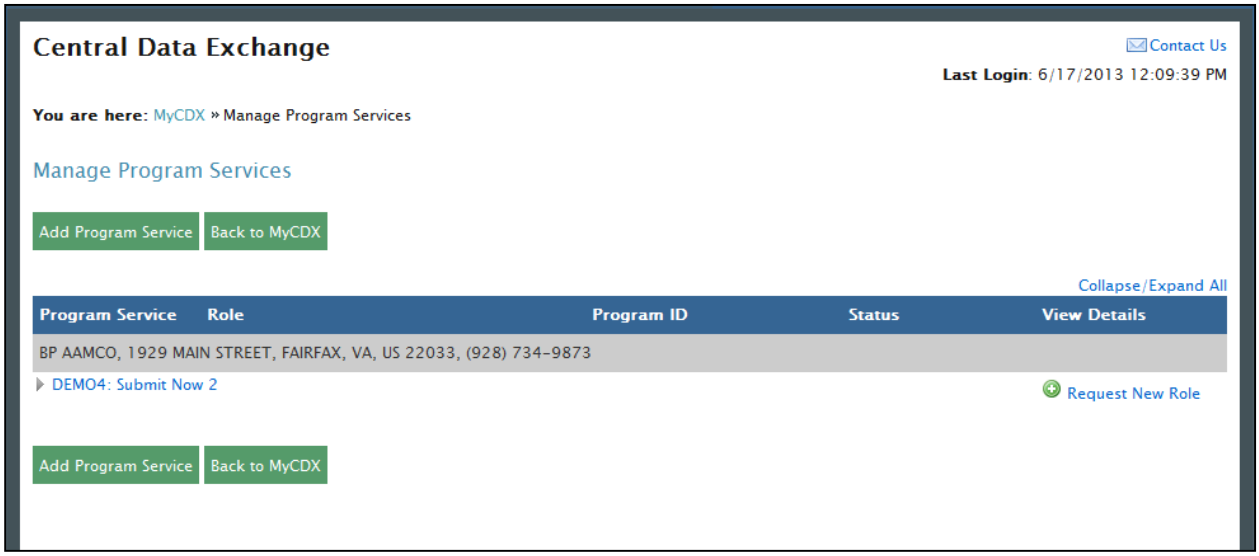
After logging into CDX, Figure 2-17 will display. To register for OTAQReg you must first add the dataflow to your account.

**Figure 2-17 MYCDX Home Page**



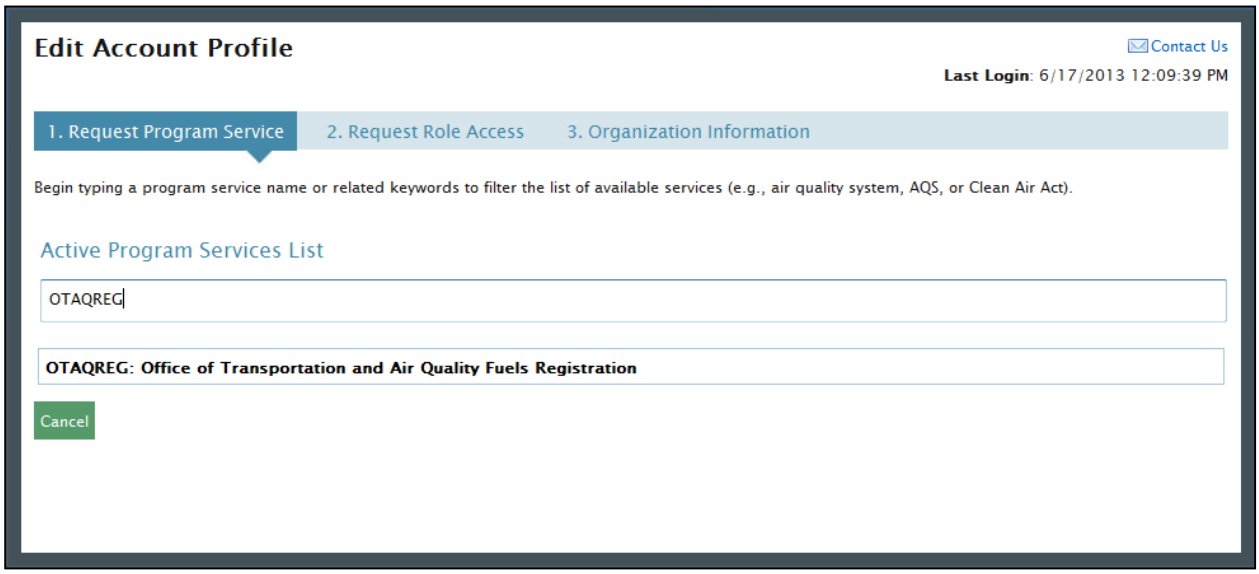

Click the "Manage Your Program Services" link. Figure 2-18 will display.

**Figure 2-18 Manage Program Services**




Click the "Add Program Service" button. This button will take you to the Edit Account Profile page, as shown in Figure 2-19.

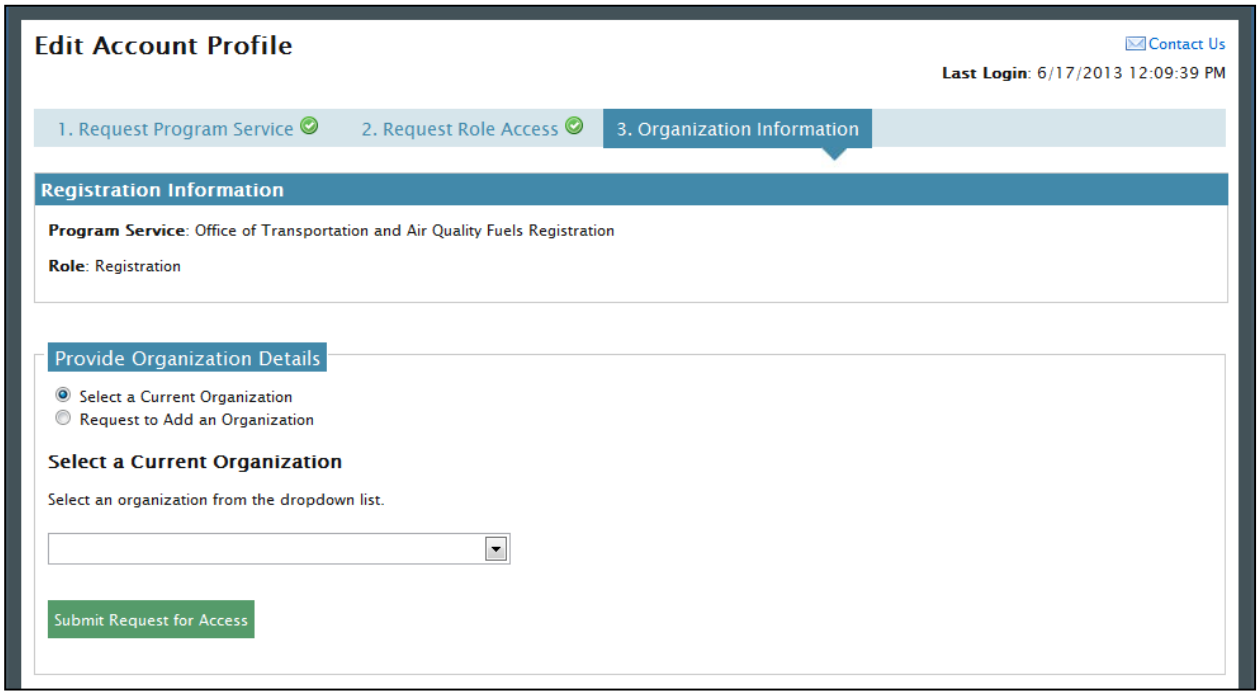
**Figure 2-19 Edit Account Profile**




The "Edit Account Profile" page lists all of the available data flows available for registration. You will need to begin typing "OTAQREG" in the text field or scroll down and search for OTAQREG within the list. Click on the hyperlinked name to select the program service and navigate to the next step.

After selecting the OTAQREG program service you will be taken to the Organization Information page where you can choose from a list of organizations that you already have access to or gain access to an additional organization, as shown in Figure 2-20.

**Figure 2-20 Organization Information**

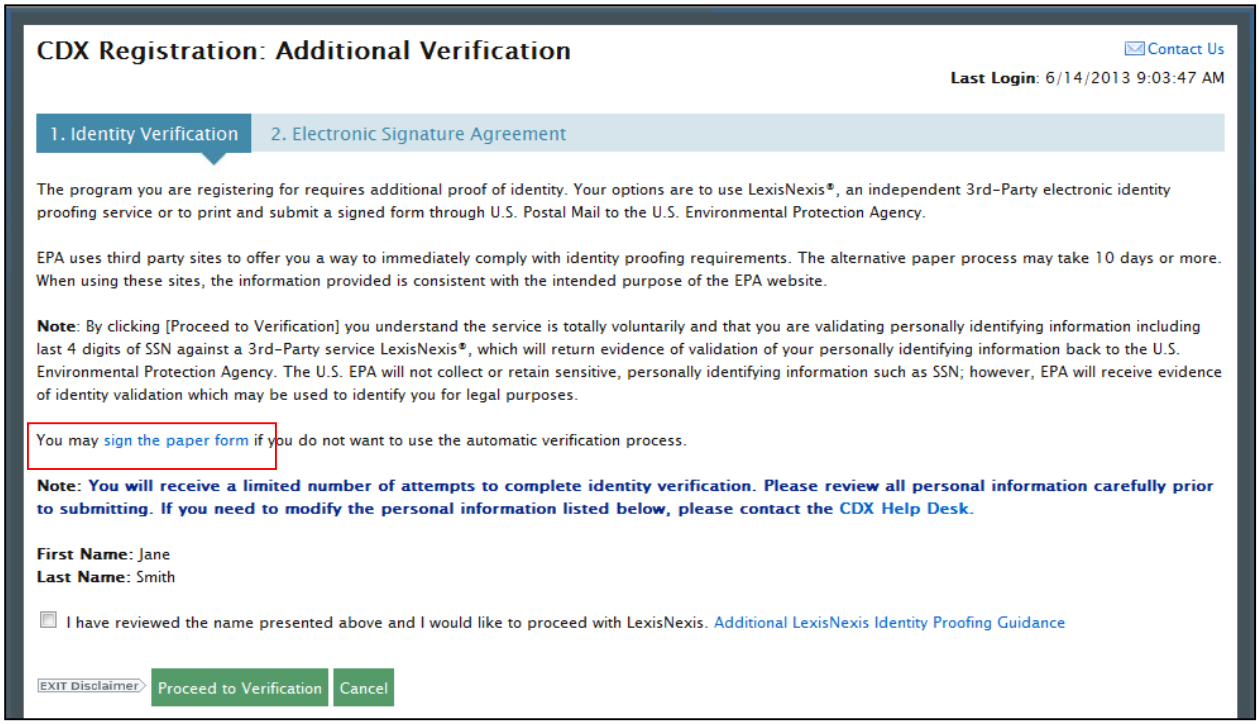


Select, or add an organization and click the “Submit Request for Access” button.

If you have already been identity proofed or have a paper ESA for that organization you will be taken directly to the MyCDX Home page.

If you have not been identity proofed and do not have an ESA for that organization, you will be taken to the Identity Verification page, as shown in Figure 2-21. Here you will have two options; print, sign and mail a paper ESA or complete LexisNexis Identity Proofing and e-sign an ESA.

**Figure 2-21 Identity Verification**



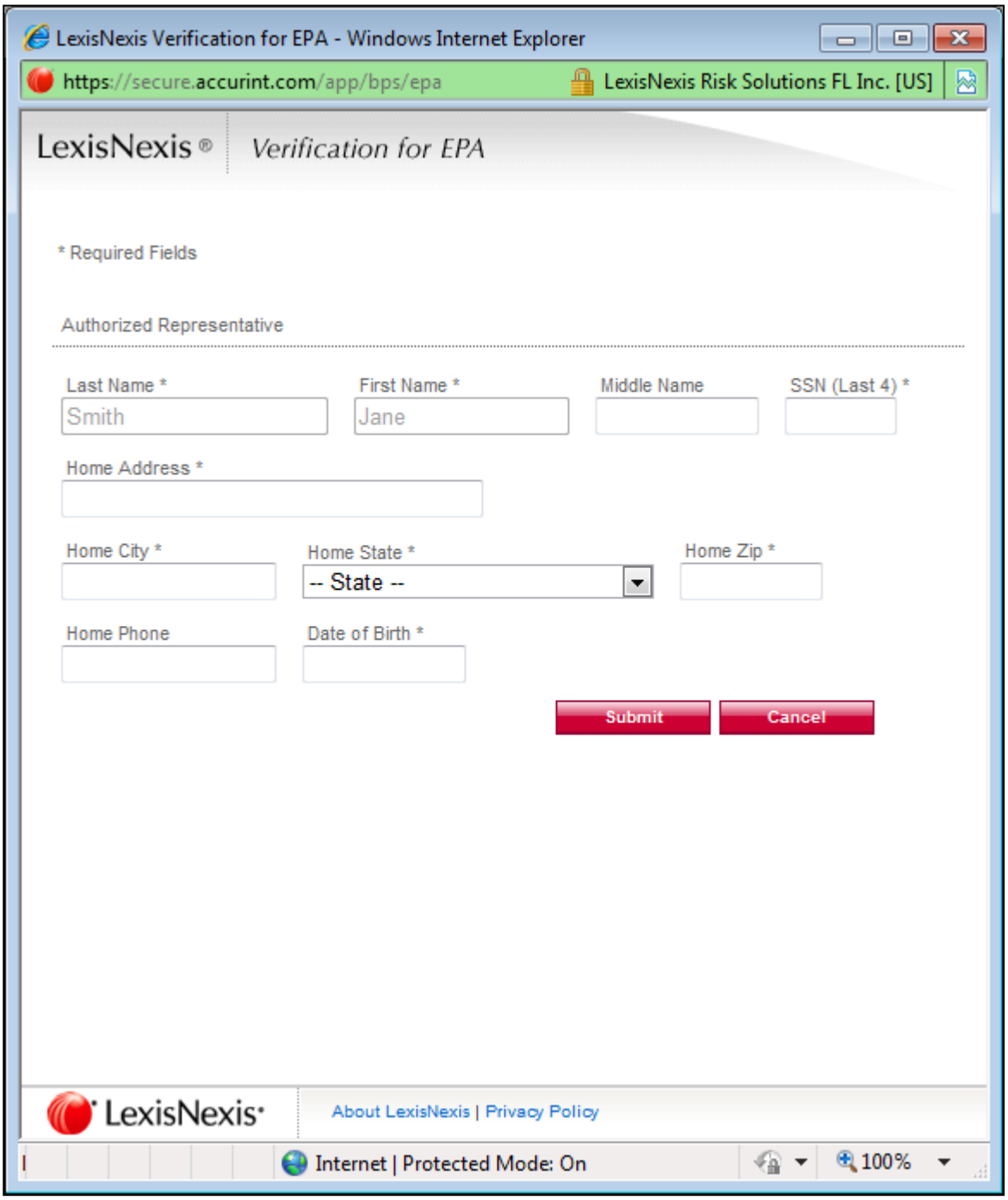

## 2.3.1 Proceed to LexisNexis

This section will take you through the registration steps if you choose to use the LexisNexis Identity Proofing process.

If you choose to proceed with LexisNexis, you will need to review all of the information provided on the Identity Verification page, as seen in Figure 2-21 above. After you have reviewed the information and verified your first and last name, check the checkbox and click the “Proceed to Verification” button.

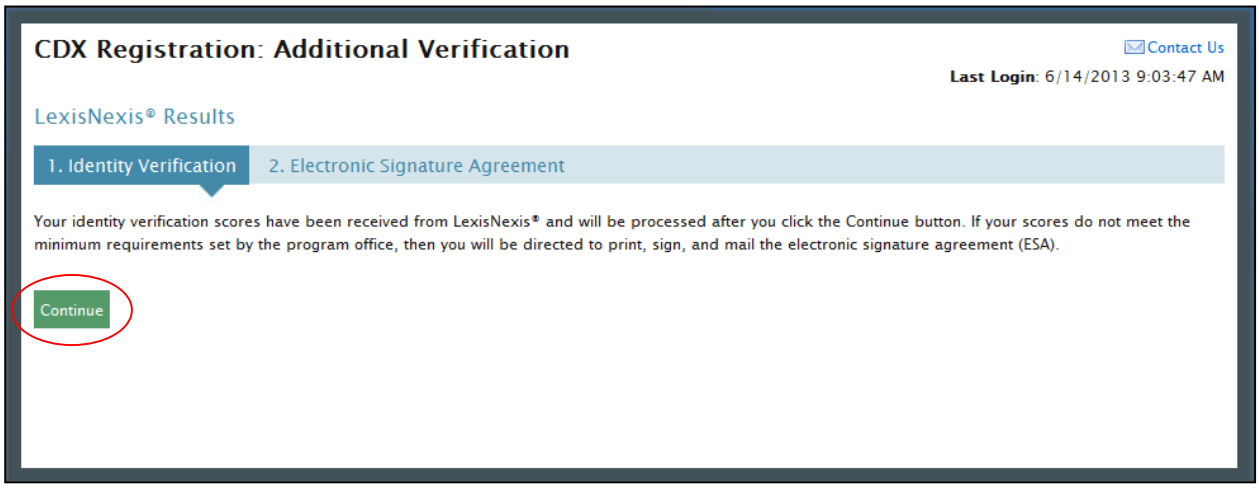
LexisNexis will be completed through a separate pop-up window. The first page will display an acknowledgement statement. Click the “OK” button. The next screen will require you to enter personal information. Figure 2-22 displays the LexisNexis pop-up window.

**Figure 2-22 LexisNexis**




After entering information in each field, click the “Submit” button. After completing this step, the LexisNexis pop-up window will display a confirmation message. Click the “OK” button to close the pop-up window and return to the CDX application.

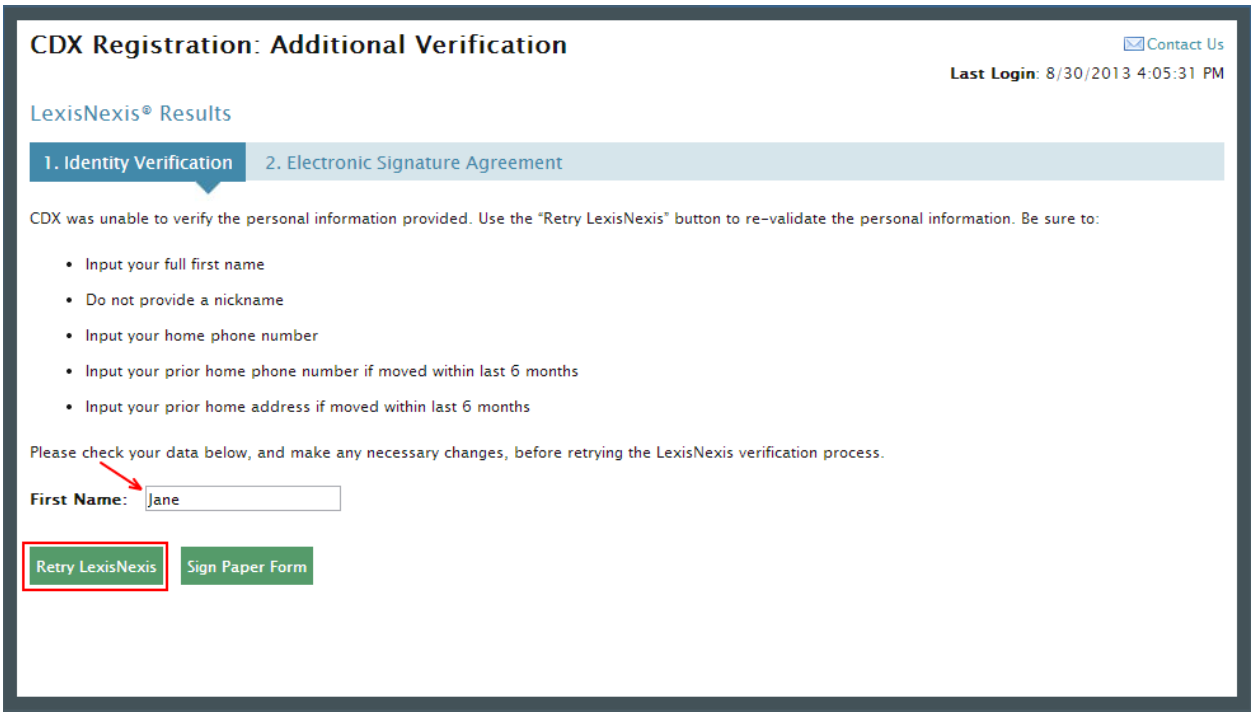
**Figure 2-23 LexisNexis Results**




In order to process your LexisNexis score and proceed with registration, click the “Continue” button, as seen in Figure 2-23. If you are successfully identity proofed by LexisNexis, you will be taken to the Challenge Questions and Answers page, as shown in Figure 2-25. If you are not successfully identity proofed by LexisNexis you will be taken to the Electronic Signature Agreement page to print, sign and mail in your ESA.

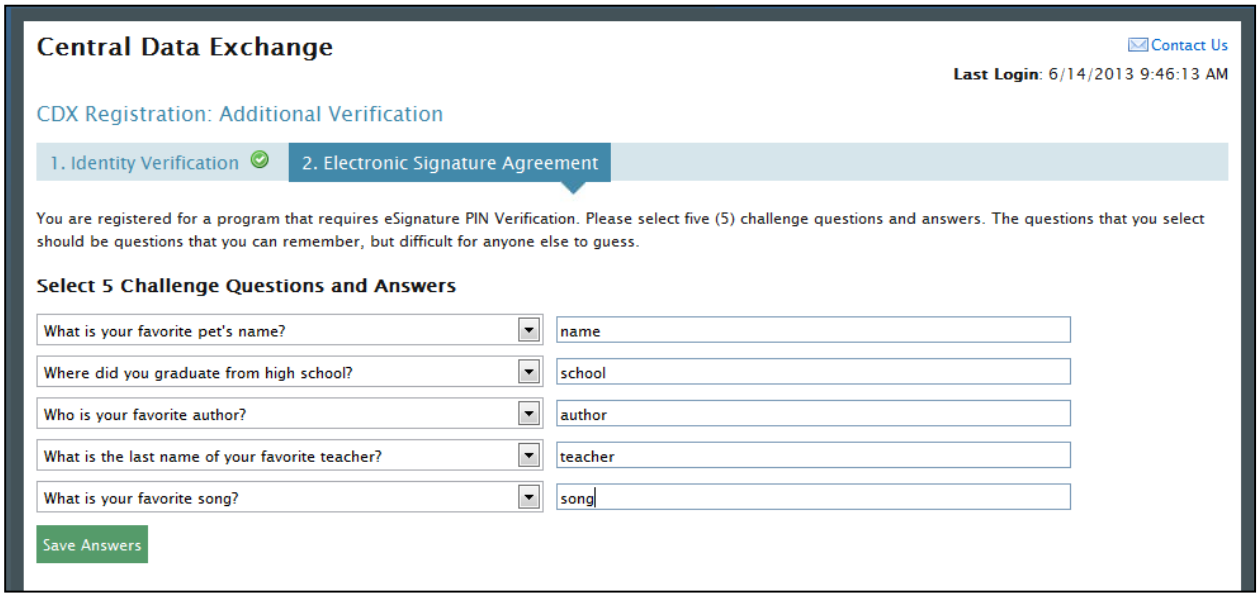
In some cases, you may be eligible to retry LexisNexis validation. If you are eligible for this retry, you will be taken to the Retry LexisNexis page where you can launch the pop-up window once again. You will also be presented with the opportunity to verify or edit your first name, as shown in Figure 2-11. The opportunity to edit your first name will only be presented to you as long as you do not have another CDX role with a status of “Awaiting ESA.” At this point you may also choose to opt-out of the LexisNexis identity proofing by clicking the “Sign Paper Form” button.

**Figure 2-24 Retry LexisNexis**




Click the "Retry LexisNexis" button. You will then be returned to the Identity Verification Page, as seen in Figure 2-21, and may begin your verification again. LexisNexis retries may be attempted up to five times before the identity proofing will be considered unsuccessful.

**Figure 2-25 20-5-1 Challenge Questions and Answers**




Once you have answered your 20-5-1 Challenge Questions and clicked the "Save Answers" button, as seen in Figure 2-25, you will be taken to the electronic version of the Electronic Signature Agreement page. From this page you will click the "Sign Electronically" button, as shown in Figure 2-26.

**Figure 2-26 Electronic ESA**

**U.S. Environmental Protection Agency**
**ELECTRONIC SIGNATURE AGREEMENT**

In accepting the electronic signature credential issued by the U.S. Environmental Protection Agency (EPA) to sign electronic documents submitted to EPA's Central Data Exchange (CDX), and as a representative for:

**Electronic Signature Holder Company Information**

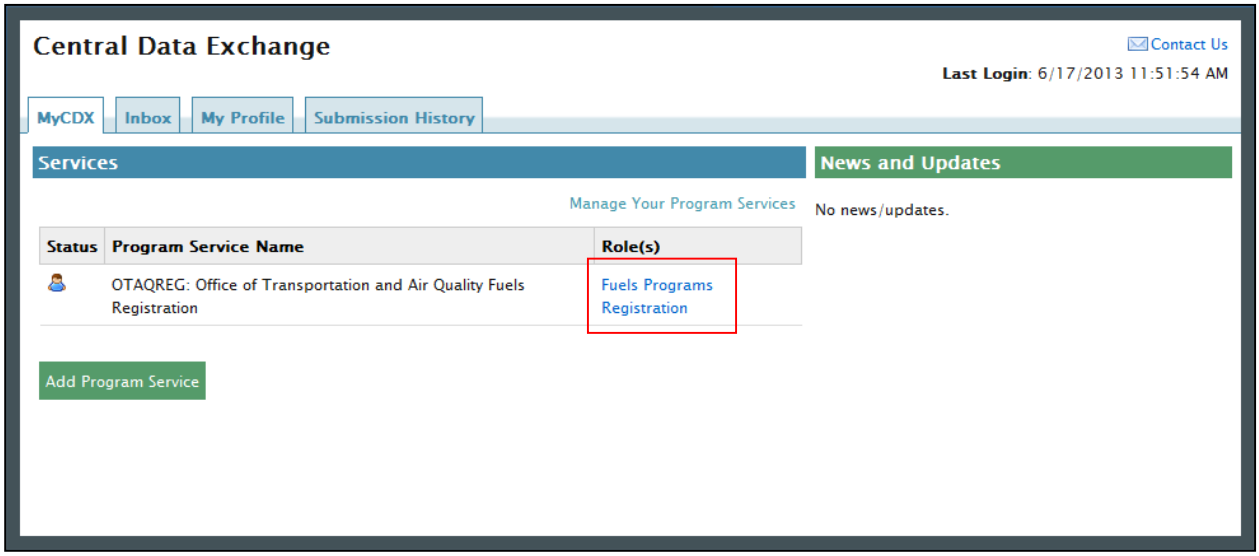
| | |
|---|---|
| Organization Name: | CGI FEDERAL |
| Address: | TEST<br>test |
| City, State, Zip: | TEST, VA 00000 |
| Province: | |
| Country: | US |
| Phone Number: | (345) 654-7437 |
| E-mail Address: | J.Smith@chemicalco.com |
| Registrant's Name: | Jane Smith |

Sign Electronically | Cancel

pop-up window, which allows you to
prompt you to enter your CDX
ick the “Sign” button. Please reference
ons on signing electronically.

directed to the MyCDX Home page.
nk to open the OTAQReg application, as

**- me Page**

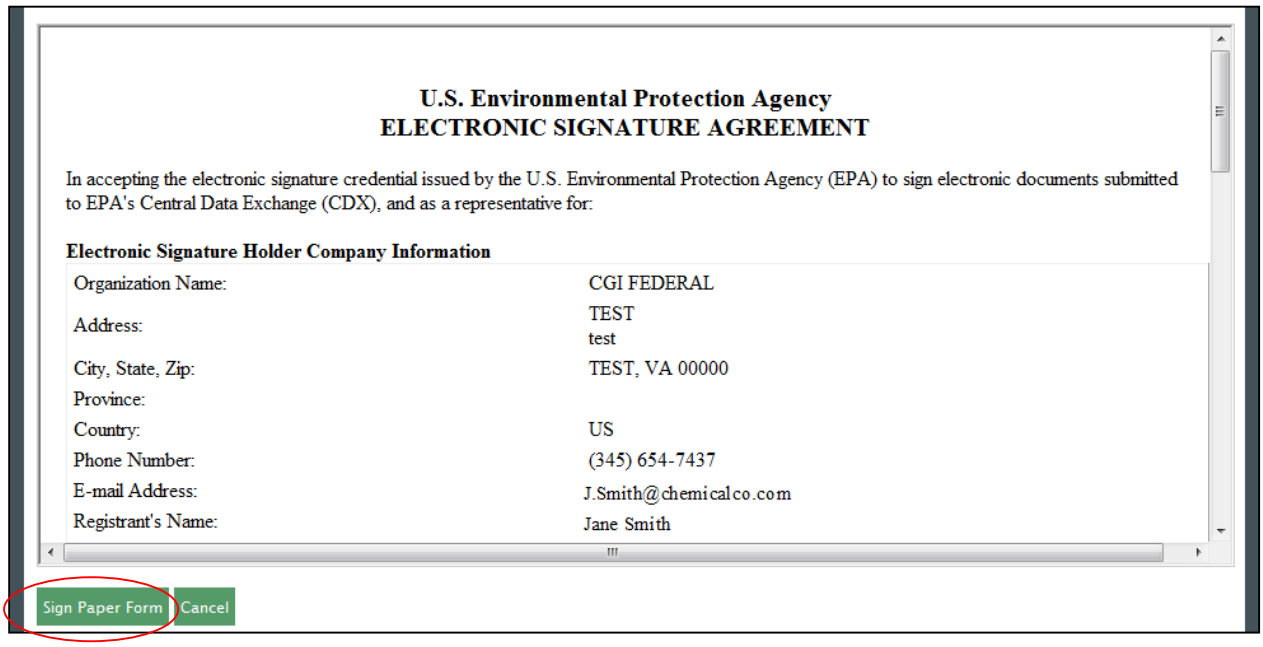


### 2.3.2 Print and Sign CDX Electronic Signature Agreement

This section will take you through the registration steps if you choose to print, sign and mail a paper ESA.

If you are not successfully identity proofed by LexisNexis you will be taken to the Electronic Signature Agreement page to print, sign and mail in your ESA. Figure 2-28 displays the paper version of the Electronic Signature Agreement page.

**Figure 2-28 Paper ESA**



**U.S. Environmental Protection Agency**
**ELECTRONIC SIGNATURE AGREEMENT**

In accepting the electronic signature credential issued by the U.S. Environmental Protection Agency (EPA) to sign electronic documents submitted to EPA's Central Data Exchange (CDX), and as a representative for:

**Electronic Signature Holder Company Information**

| | |
|---|---|
| Organization Name: | CGI FEDERAL |
| Address: | TEST<br>test |
| City, State, Zip: | TEST, VA 00000 |
| Province: | |
| Country: | US |
| Phone Number: | (345) 654-7437 |
| E-mail Address: | J.Smith@chemicalco.com |
| Registrant's Name: | Jane Smith |

Sign Paper Form Cancel

Clicking the “Sign Paper Form” button will trigger a pop-up window, which allows you to print the ESA.

Print, sign and mail the CDX ESA to the Fuels Program Helpdesk at one of the following mailing addresses:

Commercial Delivery:
U.S. Environmental Protection Agency
William Jefferson Clinton Building - North
Mail Code 6405A, Room 6520V; (202) 343-9038
1200 Pennsylvania Ave NW
Washington, DC 20004

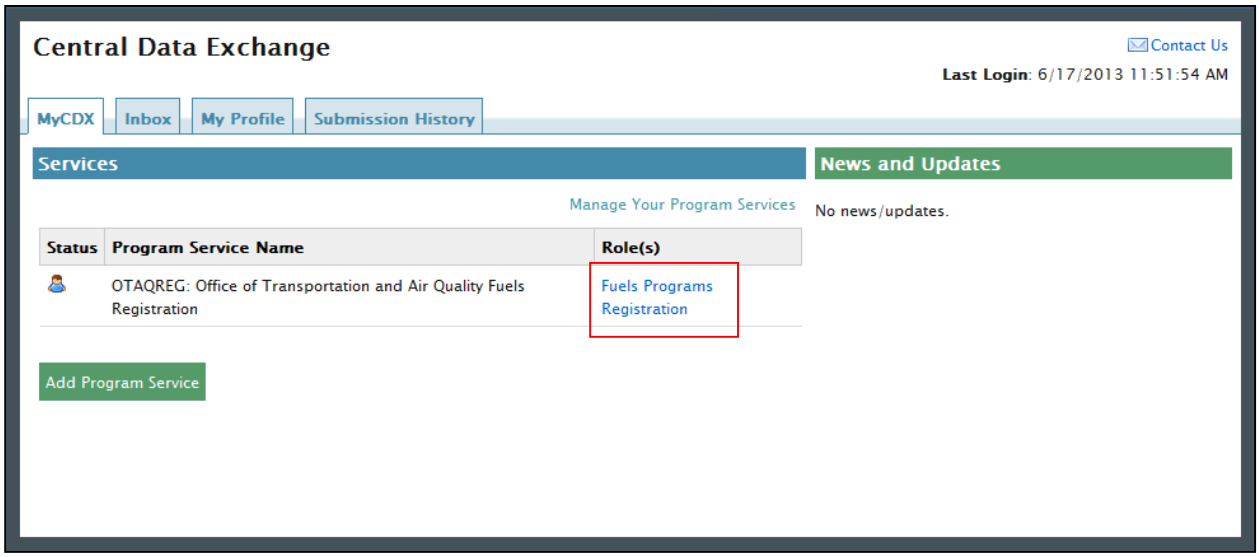
US Mail:
U.S. Environmental Protection Agency
Mail Code 6405A
1200 Pennsylvania Ave NW
Washington, DC 20460

**Note:** When using a commercial delivery service, do not use the U.S. mail address (or vice versa) as your mail will be delayed, may be returned to you, or may even never arrive at our offices. Be aware that sending materials via US Mail will require an irradiation process and could possibly delay delivery.

Paper ESAs will be processed and activated by EPA. Once your ESA has been activated you will be able to complete the 20-5-1 Challenge Questions, as seen in Figure 2-25 and will then be able to e-sign within the OTAQReg application.

New companies, company associations, company updates and RCO updates submitted within the OTAQReg application will not be accepted until your CDX ESA is received by the Fuels Program. If you have any questions regarding the status of your ESA, please contact the EPA Fuels Program Support Line by sending an email to support@epamts-support.com.

**Figure 2-29 MyCDX Home Page**




You will be given the "Fuels Programs Registration" program service link, as seen in Figure 2-29.

**Note:** You must have a CDX ESA on file in order to electronically sign submissions and letters within the OTAQReg application. You will be prompted to sign and submit your CDX ESA upon accessing the OTAQReg application until your ESA has been received by the Fuels Program.

# 3 User Profiles

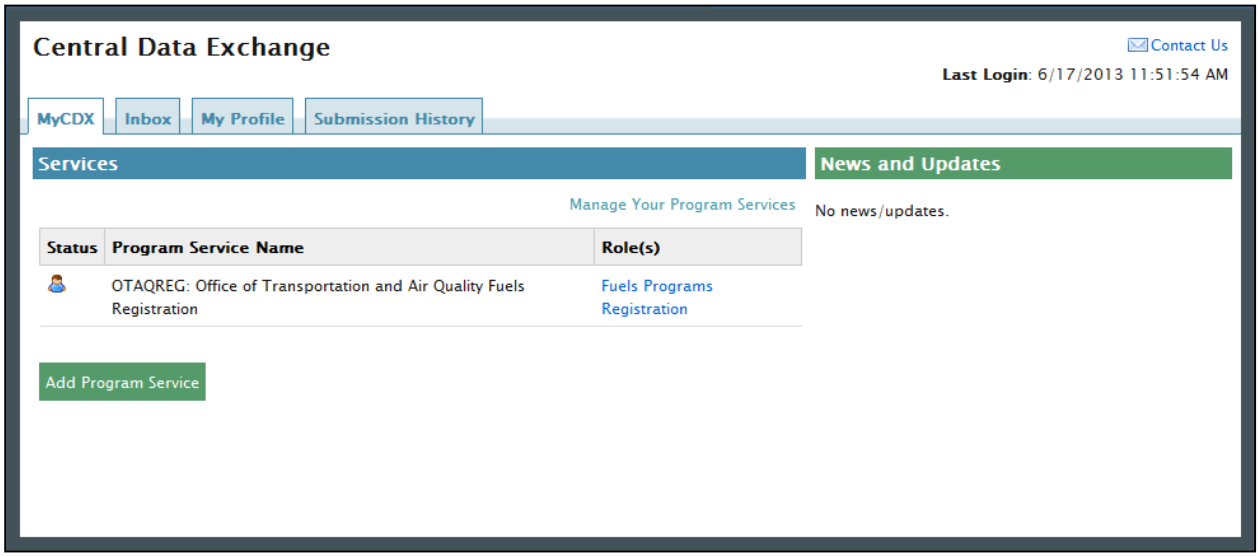
The following sections describe how to navigate within the OTAQReg application to create and edit a User Profile.

If you are an existing OTAQReg user please proceed to section 3.2.

Section 3.3 pertains to users that are currently deactivated and restricted from accessing the OTAQReg application. Please skip this section if you are a current active OTAQReg user.

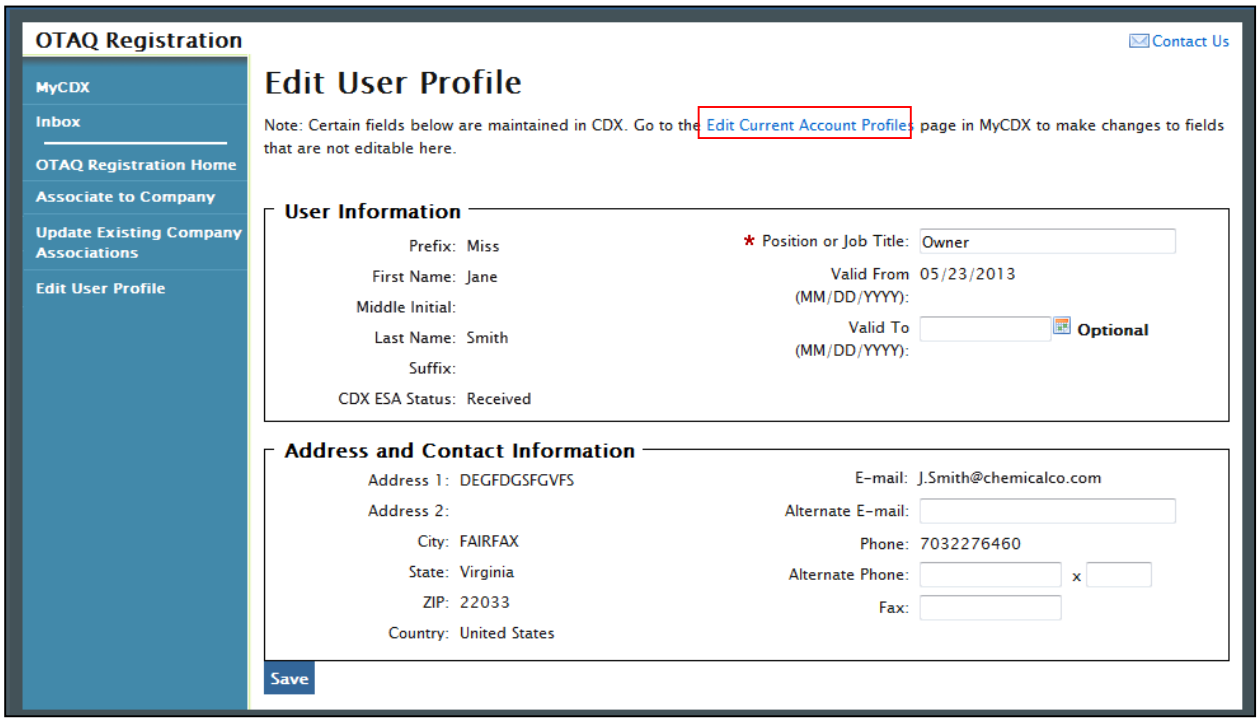
## 3.1 Create a New User Profile (New OTAQReg Users)

**Figure 3-1 MyCDX Home Page**




Click the “Fuels Programs Registration” link on your MyCDX Home page, as seen in Figure 3-1. Upon your initial login to OTAQReg, Figure 3-2 will display.

**Figure 3-2 Edit User Profile Page**




The page will pre-populate the contact information associated to your CDX account. To edit the pre-populated information, click the “Edit Current Account Profiles” link to be taken to the CDX Edit Organization Profiles page.

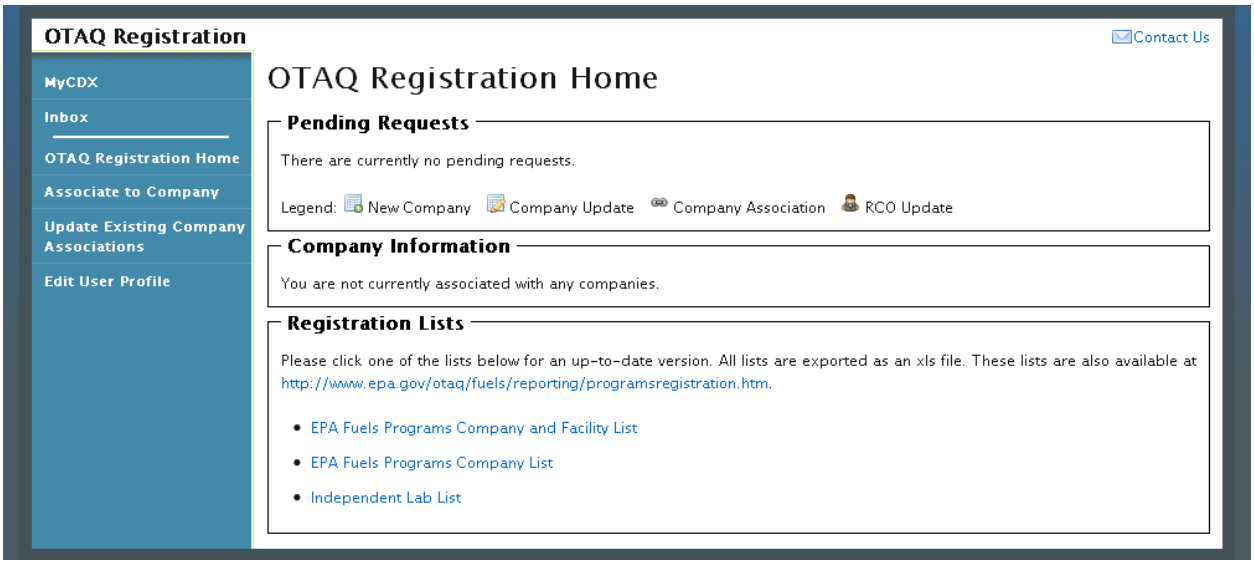
If no changes to the pre-populated information are needed, enter data into any of the applicable textboxes. You must provide data for the “Position or Job Title” field. Click the “Save” button. Your user profile will be saved and Figure 3-3 will display.

**Figure 3-3 OTAQ Registration Home Page**

## 3.2 Edit Existing User Profile

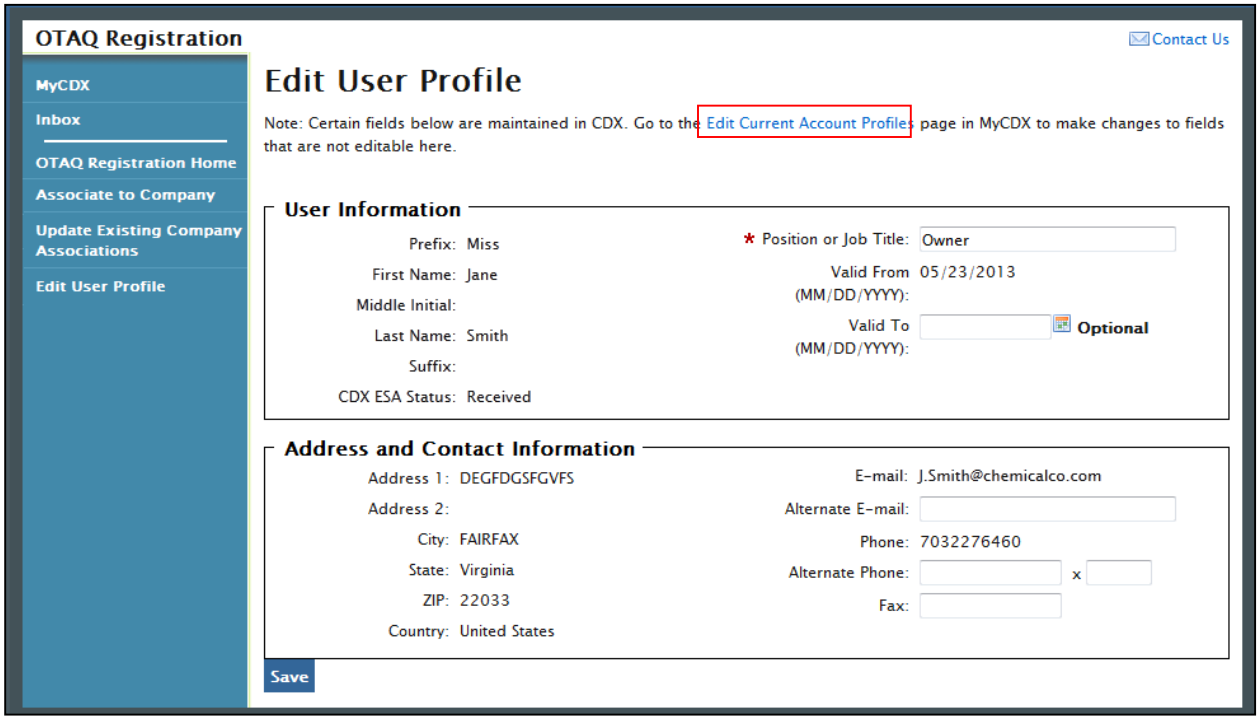
The following section describes how to edit your OTAQReg User Profile information.

**Figure 3-4 OTAQ Registration Home Page**




Clic Q Registration Home page, as

-



The page will pre-populate with your current OTAQReg User Profile information. To update the un-editable CDX user information, click the “Edit Current Account Profiles” link to be taken to the CDX Edit Organization Profiles page.

Edit any of the additional user profile data by updating the data in the textboxes and clicking the “Save” button.

## 3.3 Deactivated Users

If you have been deactivated by an EPA Administrator for the OTAQReg application, upon clicking the OTAQReg application link on the MyCDX Home page, Figure 3-6 will display.

**Figure 3-6 OTAQ Deactivated Home Page**

This screen notifies you that your OTAQReg profile has been deactivated and provides the phone number and e-mail address to contact the EPA Fuels Programs for any questions or to reactivate your account.

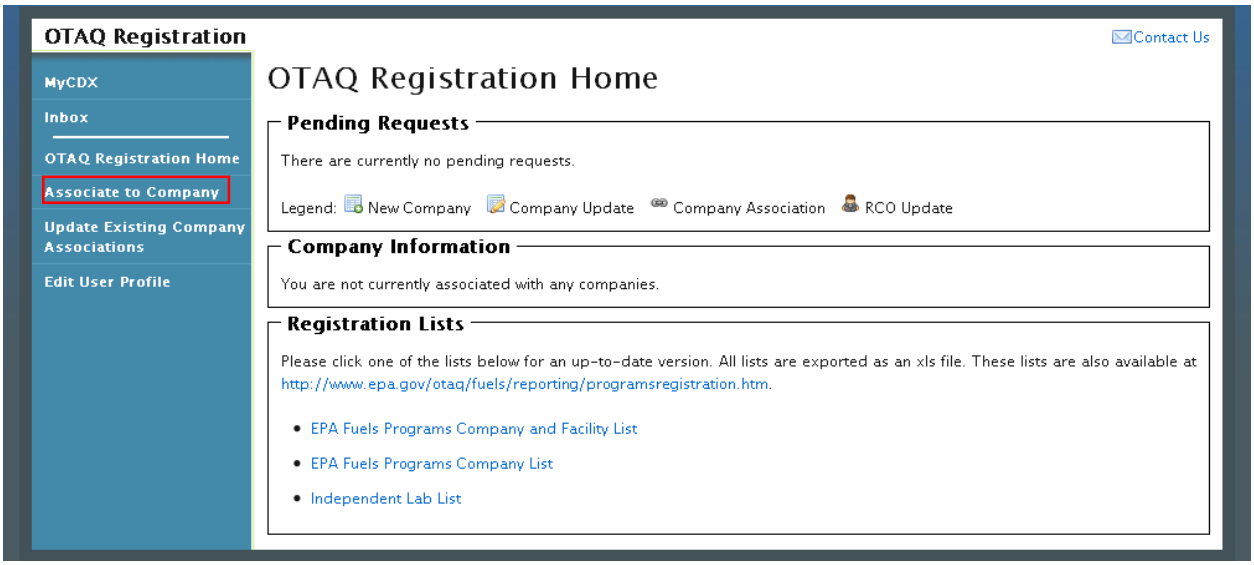
Click the “CDX Home Page” button to return to the MyCDX Home page.

# 4 Company Associations

The following sections describe how to add and update company associations within the OTAQReg application.

## 4.1 Add Company Association

**Figure 4-1 OTAQ Registration Home Page**

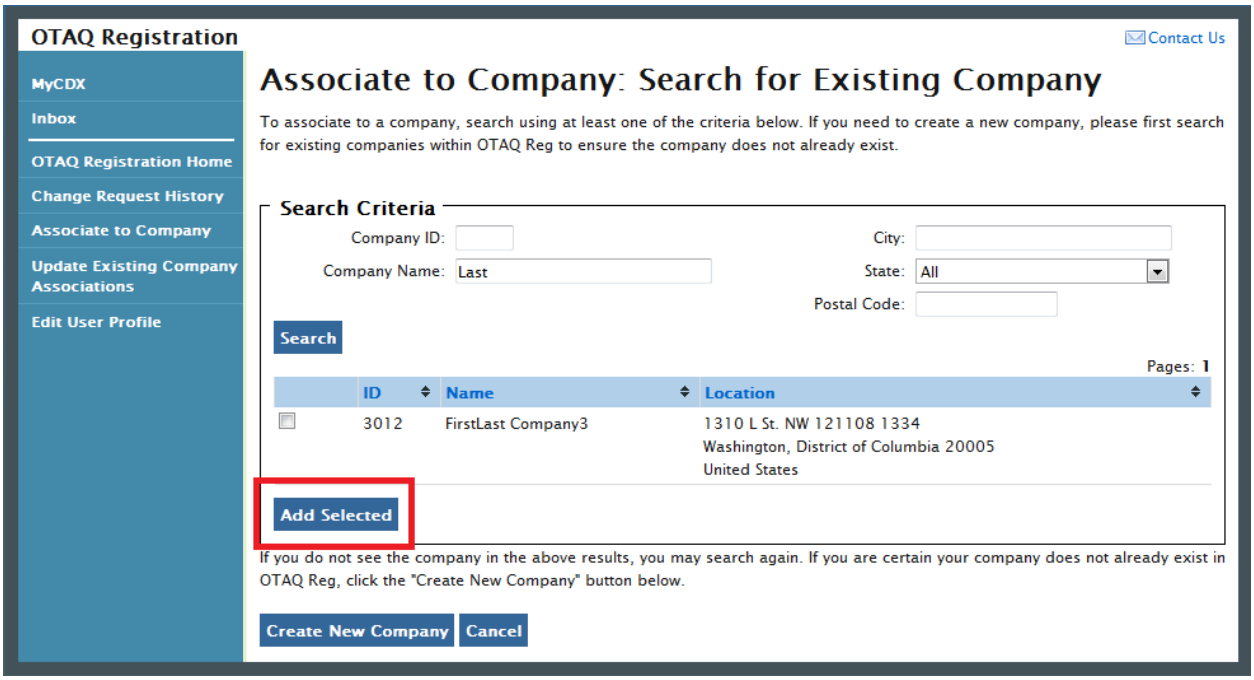



Click the "Associate to Company: Search for Existing Company" link in the left side toolbar of your OTAQ Registration Home page, as seen in Figure 4-1. Figure 4-2 will display.

**Figure 4-2 Associate to Company Search Page**

Enter your company specific search criteria into the textboxes and click the "Search" button. A list of all companies matching your search criteria will display, as shown in Figure 4-3.

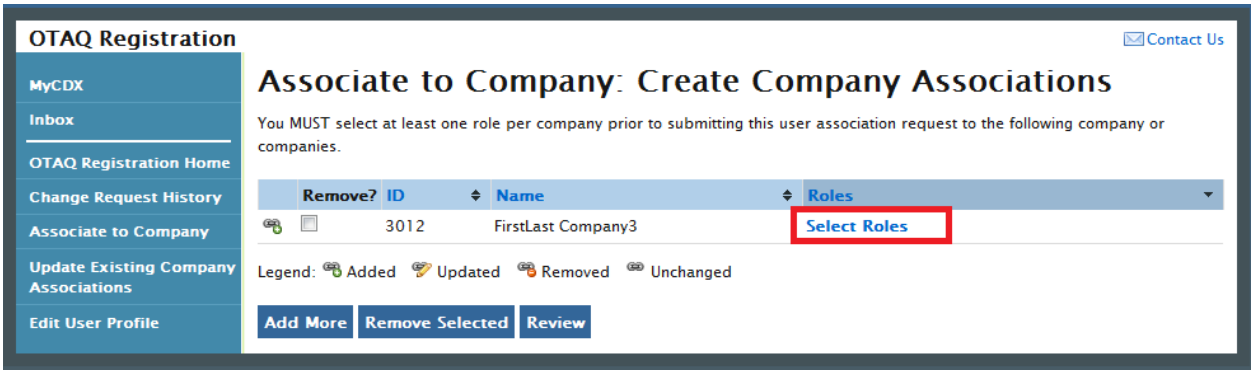
**Figure 4-3 Associate to Company Search Results**




Select the checkbox next to the company with which you wish to associate (if you do not see your company listed in the results, click the "Create New Company" button to create your company; see Section 5 for further details). Click the "Add Selected" button. Figure 4-4 will display.

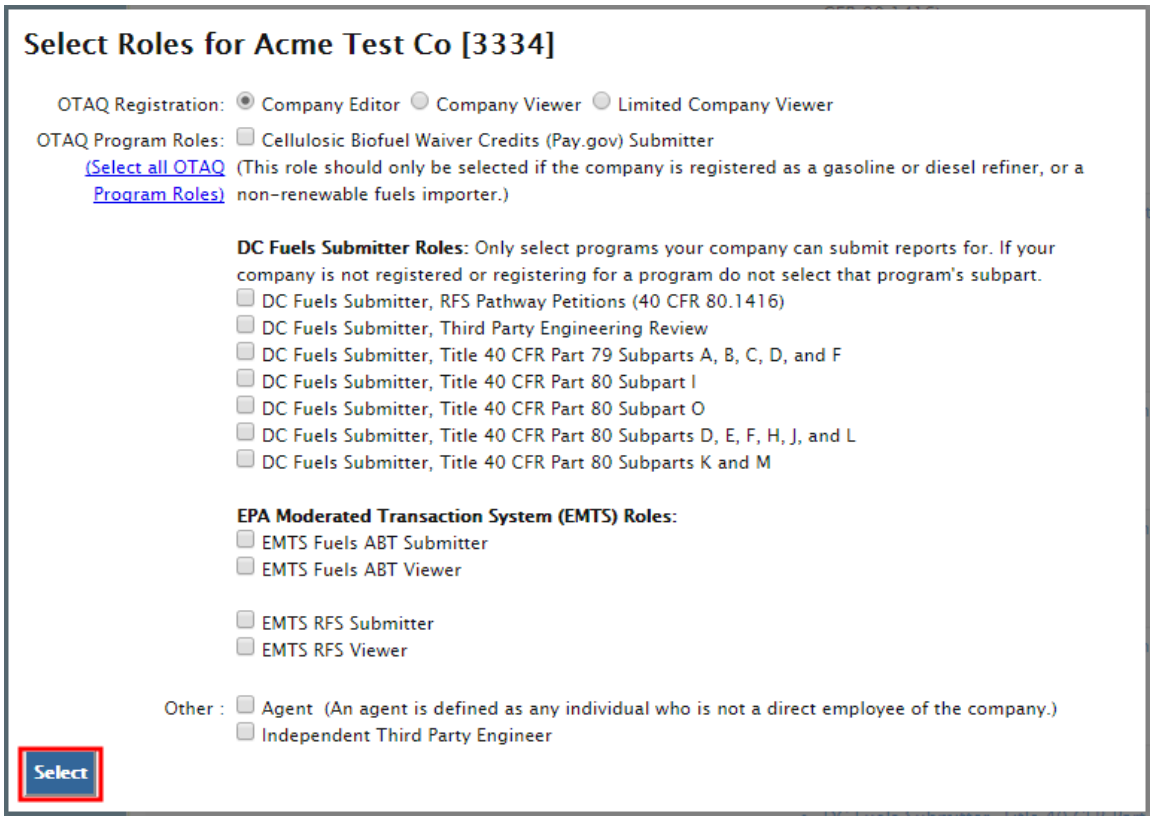
**Note:** You may select multiple check boxes if you wish to associate to more than one company.

**Figure 4-4 Associate to Company: Create Company Associations Page**




You must select at least one role per company prior to submitting your user association request. Click the "Select Roles" link to display a pop-up of available roles for the company. Figure 4-5 will display.

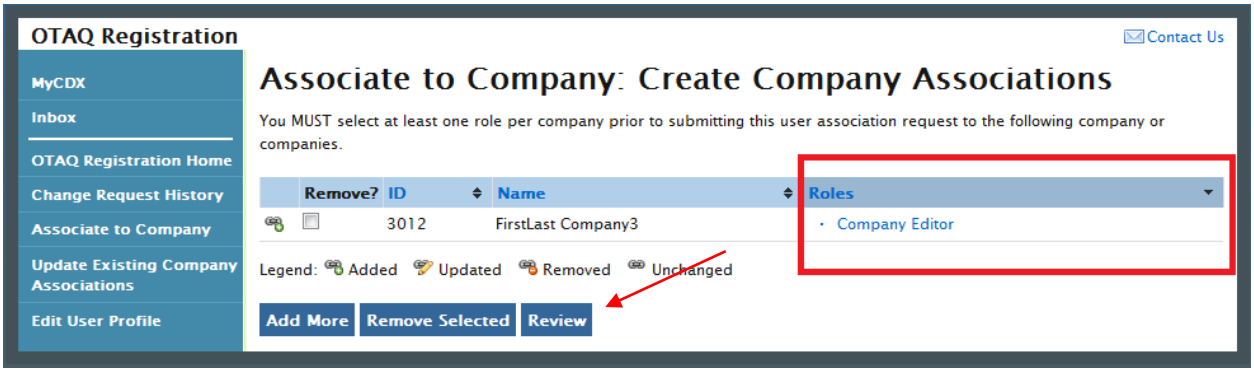
**Figure 4-5 Company Roles Pop-Up**




Choose the appropriate OTAQ Registration and OTAQ Program Roles by selecting the corresponding radio button and checkboxes (reference Appendix A: OTAQ Registration Roles if you are unsure which roles to select). You may select only one OTAQ Registration role, however multiple OTAQ Program roles are allowed. Click the "Select All" link to select all OTAQ Program Roles.

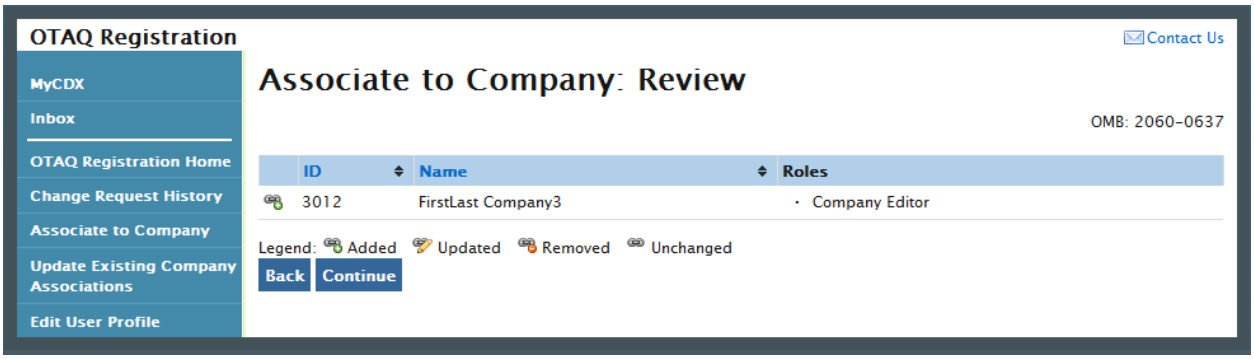
Click the "Select" button once you have made your selections. Figure 4-6 will display.

**Figure 4-6 Associate to Company: Create Company Associations Page with Roles**




Your selected roles will now display beside the selected company. Click the "Review" button to continue. Figure 4-7 will display.

**Figure 4-7 Associate to Company: Review Page**




The "Associate to Company: Review" page displays a read-only version of your company association details. If the company and role information are correct, click the “Continue” button. Figure 4-8 will display.

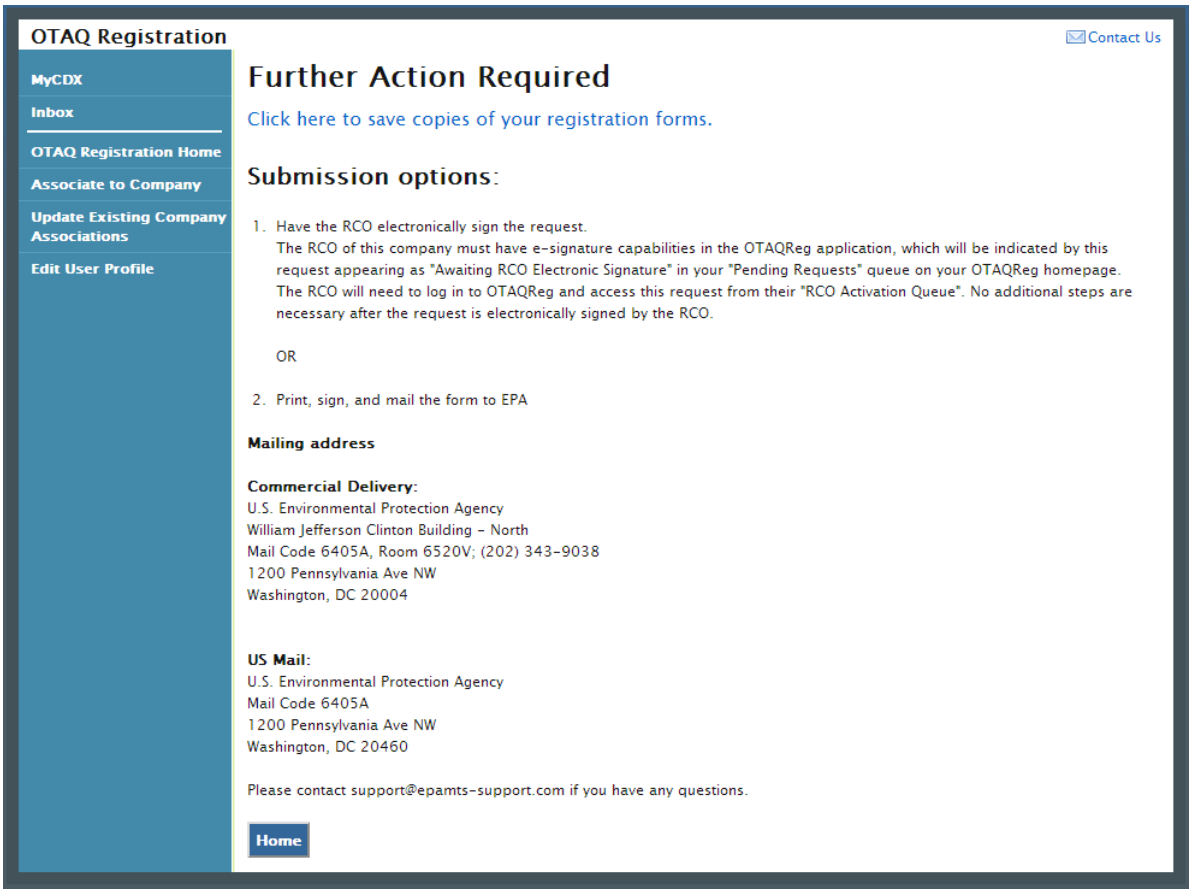
**Figure 4-8 Further Action Required Pop-up**

Click “OK” to Close the pop-up and continue to the next page. Figure 4-9 will display.

**Figure 4-9 Associate to Company: Submit Request Page**

Click the "Submit" button to submit the request. Figure 4-10 will display.

**Figure 4-10 Further Action Required Page**




Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms after submitting your request. If you attempt to select the "Home" button without first saving a copy of your registration forms, a notification window will appear prompting you to first save your forms.

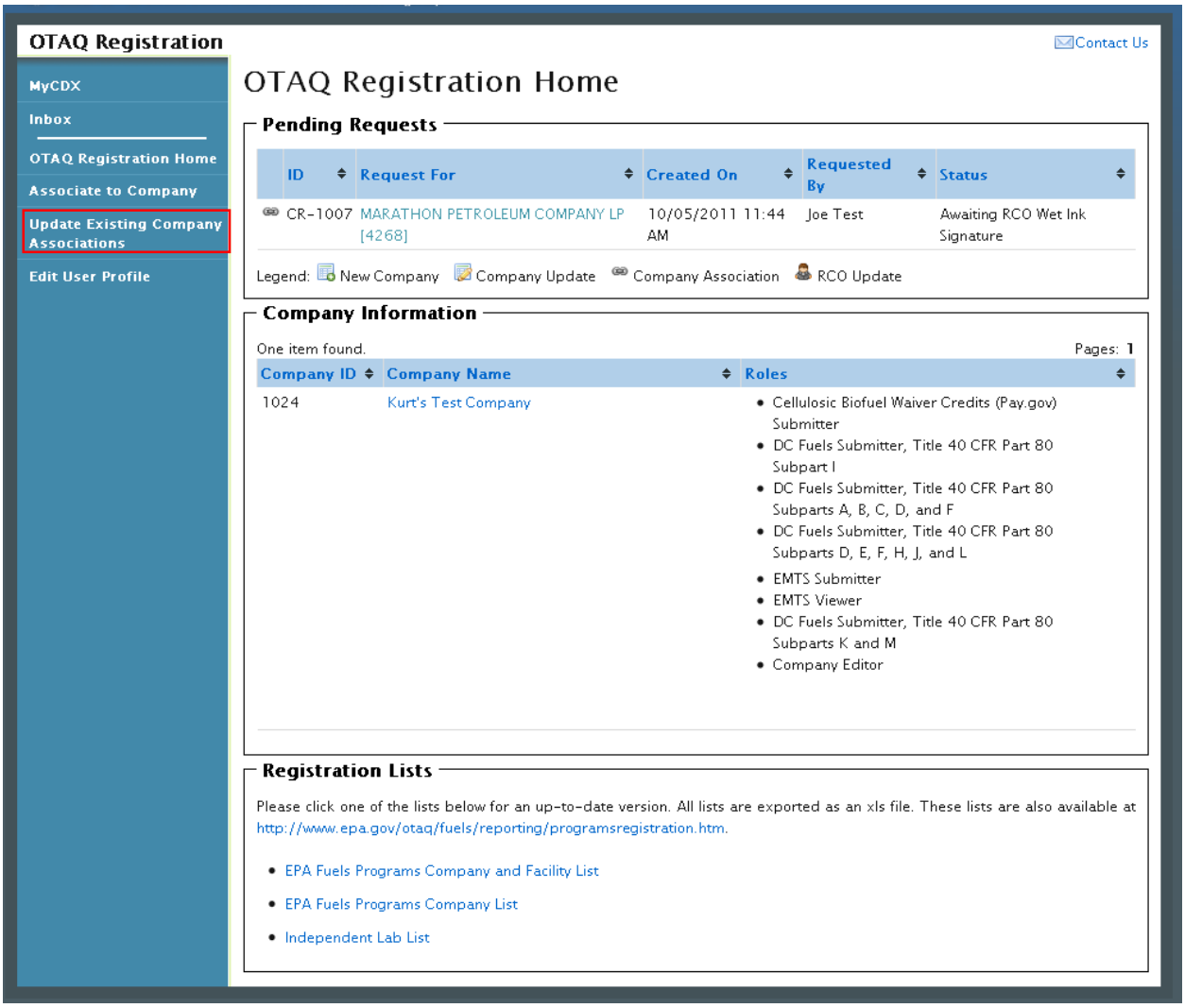
Once you have submitted your Company Association Request, you will receive an email notification stating that your Company Association Request is awaiting RCO signature along

with a hard copy of your company association registration forms. The Company Association request will appear in the Pending Requests section of your OTAQ Registration Home Page, as shown in Figure 4-26.

> **Note:** All Company Association requests require a signed RCO Delegation Letter by your Company Responsible Corporate Officer. The RCO Delegation Letter is included in the hard copy of your company association registration forms. This letter can be electronically signed by the RCO in OTAQReg if they have a valid CDX ESA.

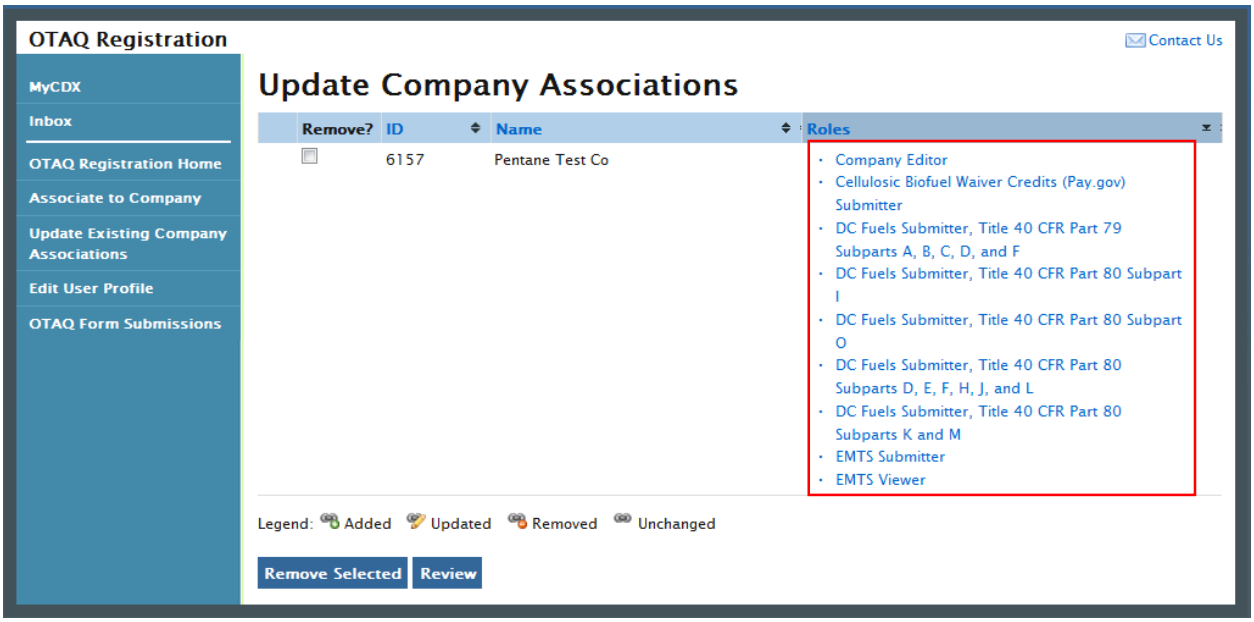
## 4.2 Update Company Roles

**Figure 4-11 OTAQ Registration Home Page**



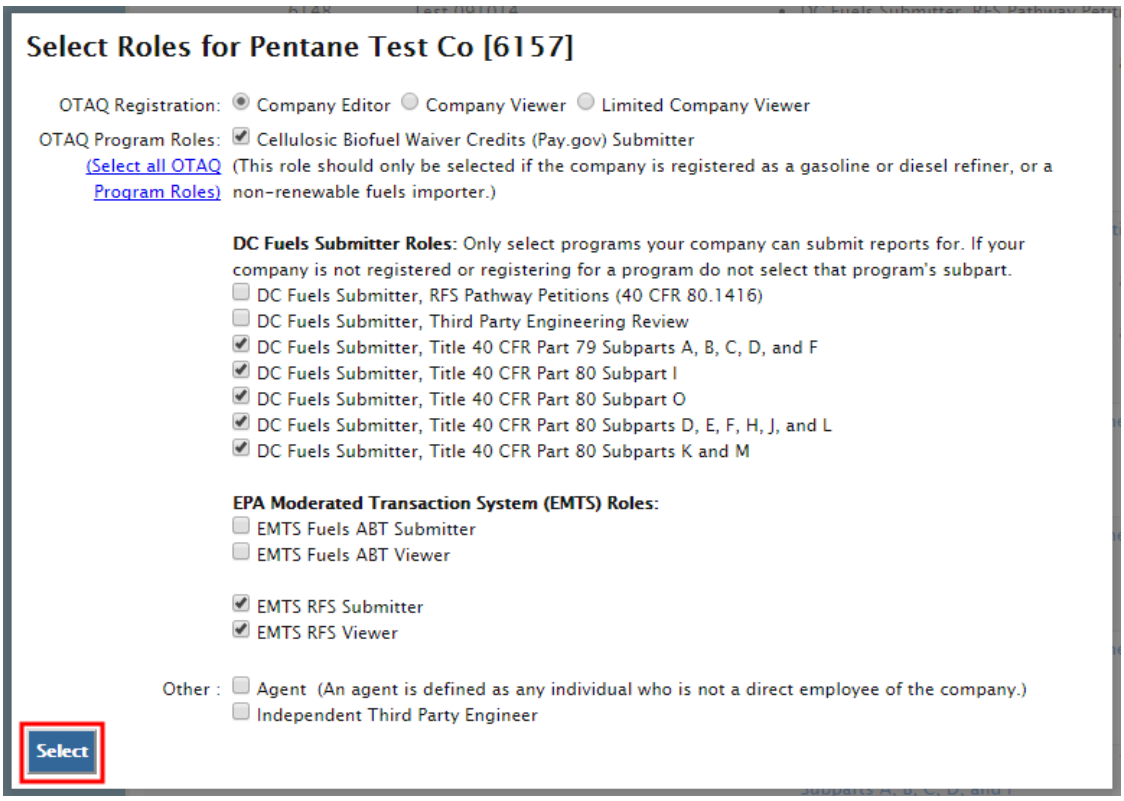

Click the "Update Existing Company Association" link in the left side toolbar of your OTAQ Registration Home Page. Figure 4-12 will display.

**Figure 4-12 Update Company Associations Page**




Select the "Roles" link for the company you wish to update. Figure 4-13 will display.

**Figure 4-13 Update Roles**

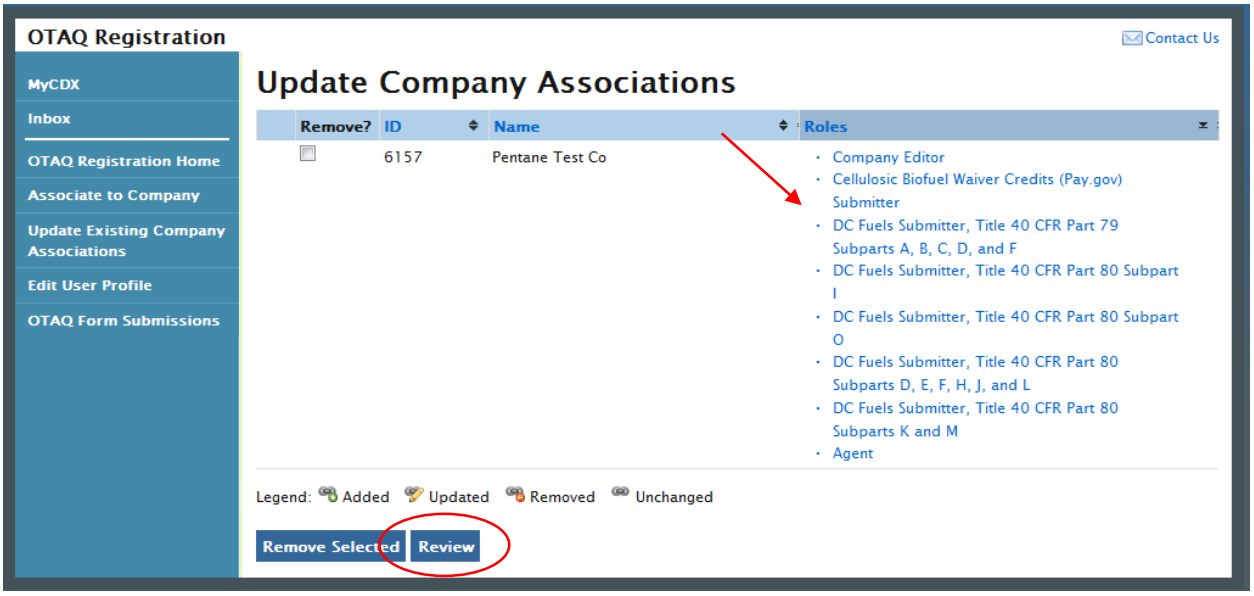



Your existing roles will be pre-selected on the page. Update your OTAQ Registration and OTAQ Program Roles by selecting a new radio button and/or checkboxes (reference Appendix A:

OTAQ Registration Roles if you are unsure which roles to select). You may select only one OTAQ Registration role however multiple OTAQ Program Roles are allowed.

Click the "Select" button once you have made your selections. Figure 4-14 will display.

**Figure 4-14 Updated Company Associations**




The Update Company Associations Page will now display your updated roles. Click the "Review" button. Figure 4-15 will display.

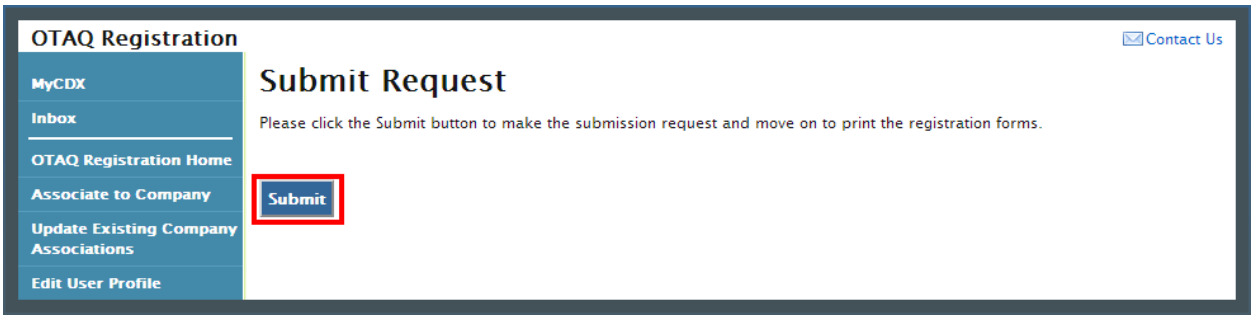
**Figure 4-15 Confirm Updated Company Association**

The page will display the updated icon for the updated company association. If the updated company association is correct, click the "Continue" button. Figure 4-16 will display.

**Figure 4-16 Further Action Required Pop-up**

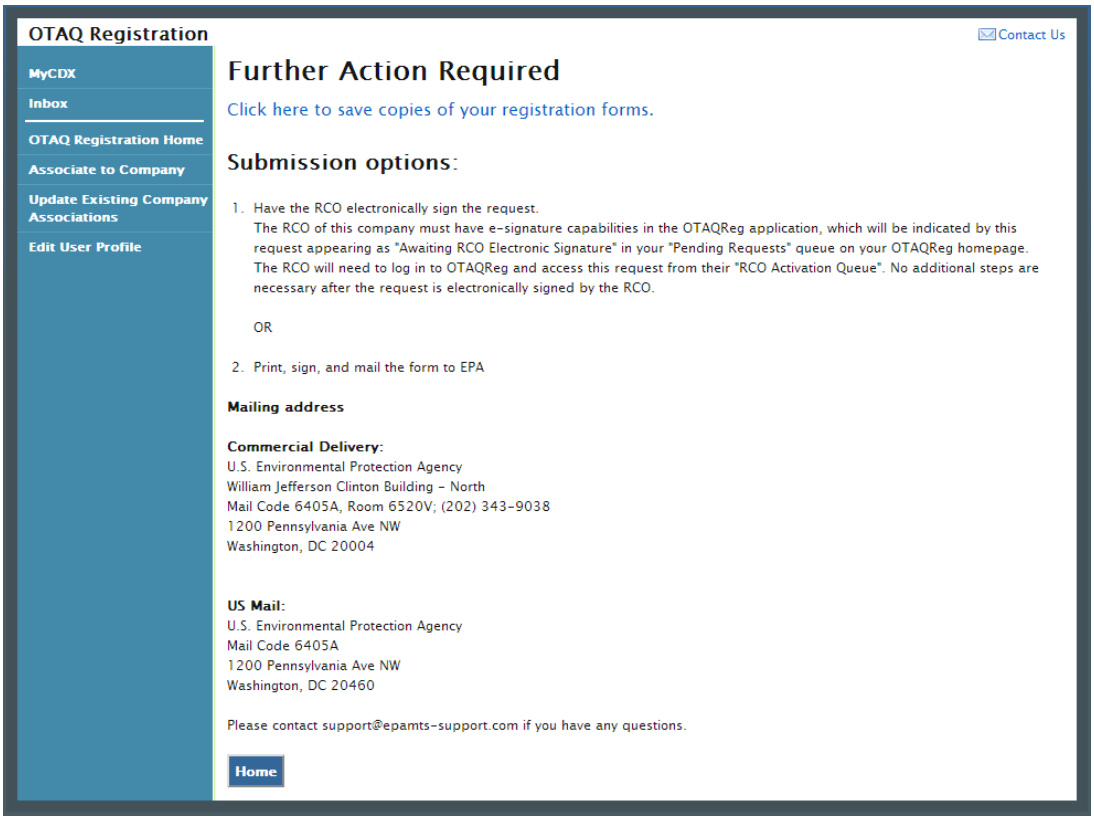
Click "OK" to Close the pop-up and continue to the next page. Figure 4-17 will display.

**Figure 4-17 Submit Request Page**




Click the "Submit" button to submit your request. Figure 4-18 will display.

**Figure 4-18 Further Action Required Page**




Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms after submitting your request. If you attempt to select the "Home" button without first saving a copy of your registration forms, a notification window will appear prompting you to first save your forms.

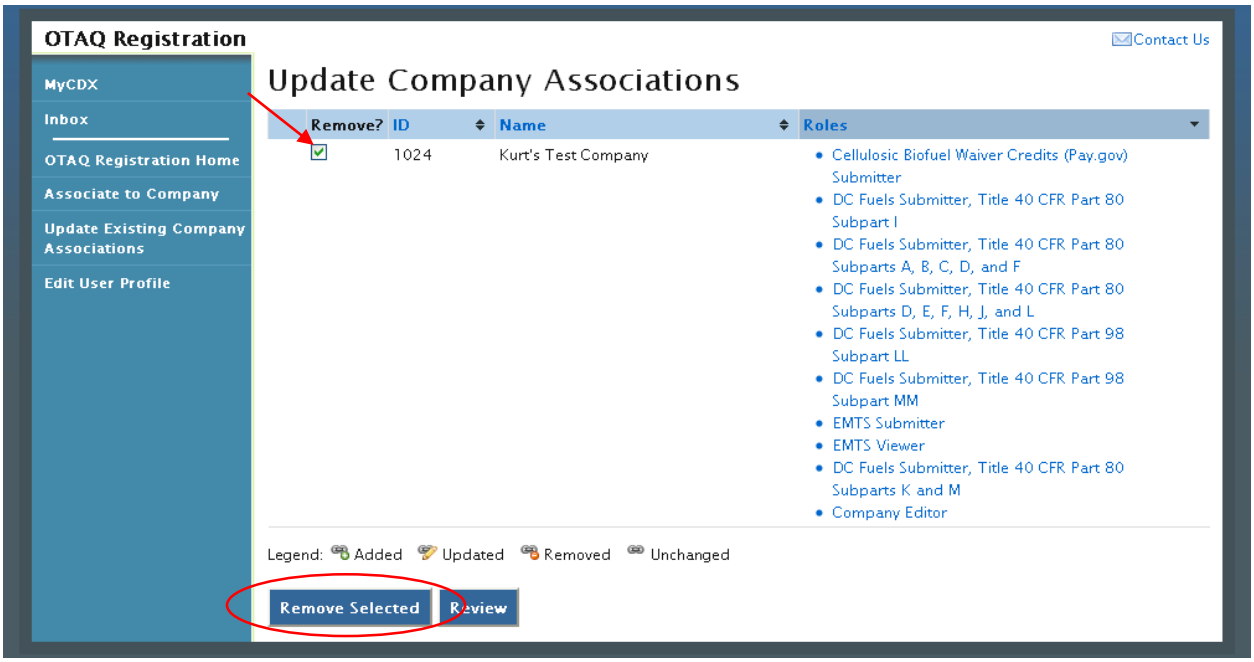
> **Note:** All Company Association Update Requests require a signed RCO Delegation Letter by your Company Responsible Corporate Officer. The RCO Delegation Letter is included in the hard copy of your company association registration forms. This letter can be electronically signed by the RCO in OTAQReg if they have a valid CDX ESA.

Once you have submitted your Updated Company Association, you will receive an email notification stating your request is awaiting RCO signature along with a hard copy of your company association registration forms. The updated company association request will appear in the pending requests section of your OTAQ Registration Home Page. Please reference Section 4.4 for information on viewing pending association requests.

## 4.3 Remove Existing Company Association

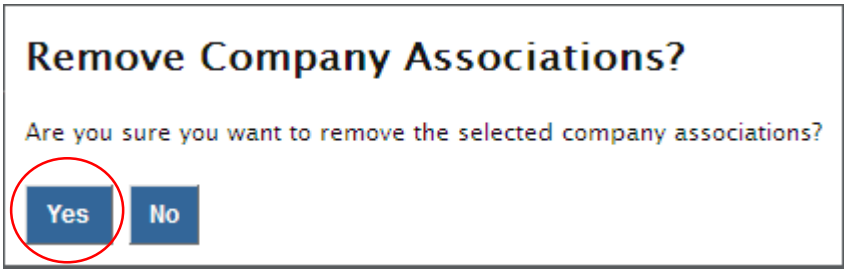
To remove an existing company association, navigate to the Update Company Associations page, as shown in Figure 4-19.

**Figure 4-19 Remove Company Association**



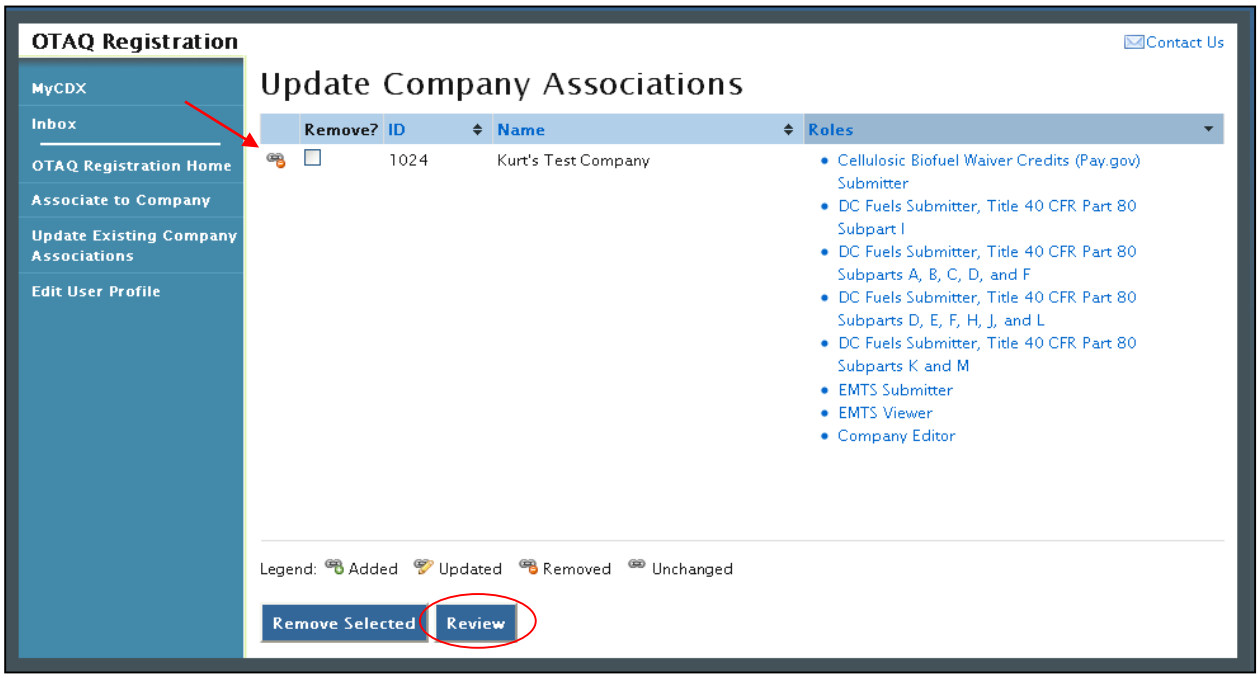

Select the checkbox next to the company association you wish to remove and click the "Remove Selected" button. Figure 4-20 will display.

**Figure 4-20 Remove Company Pop-Up**



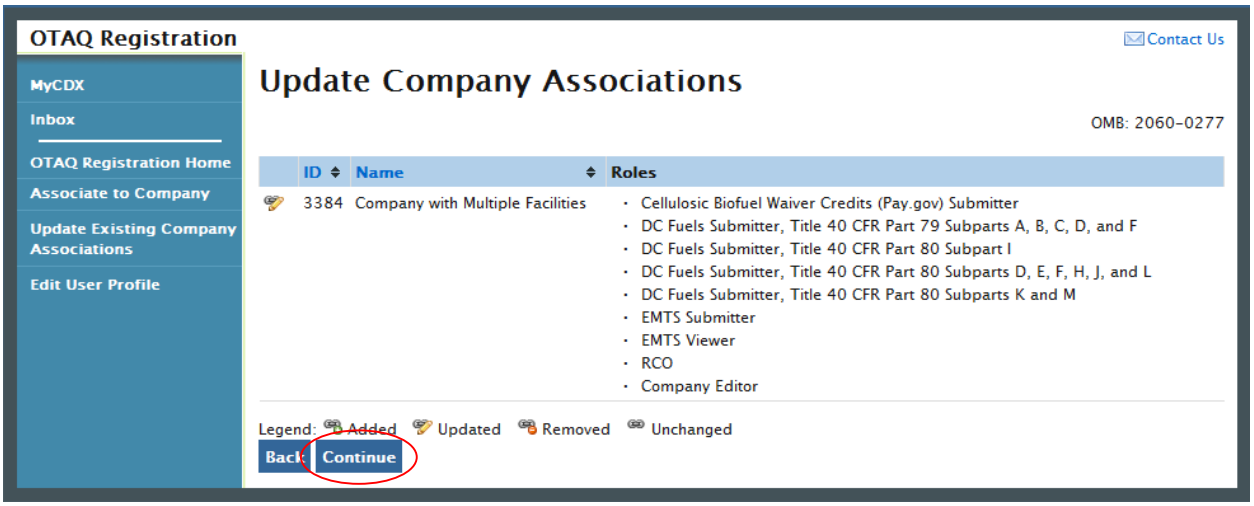

Click the "Yes" button to confirm that you would like to remove the selected company association. Figure 4-21 will display.

**Figure 4-21 Removed Company Association**




The removed icon will now display next to the company association you have removed. Click the "Review" button. Figure 4-22 will display.

**Figure 4-22 Remove Company Association Confirmation**

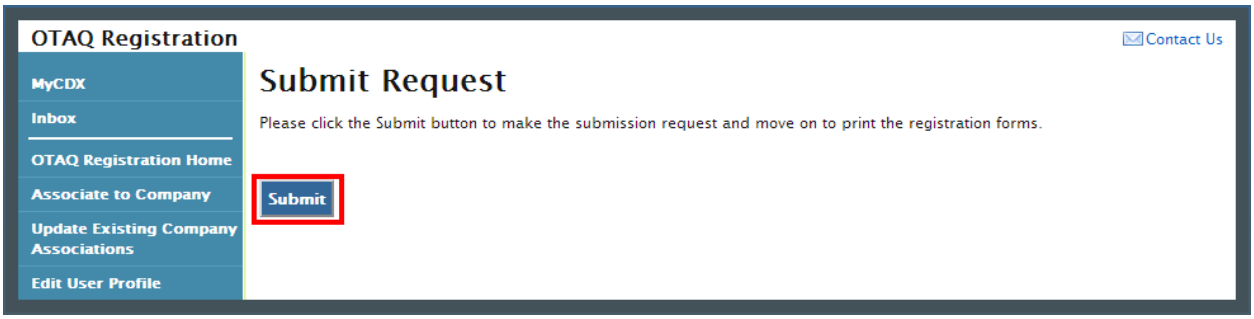



If the removed company association is correct, click the "Continue" button. Figure 4-23 will display.

**Figure 4-23 Further Action Required Pop-up**

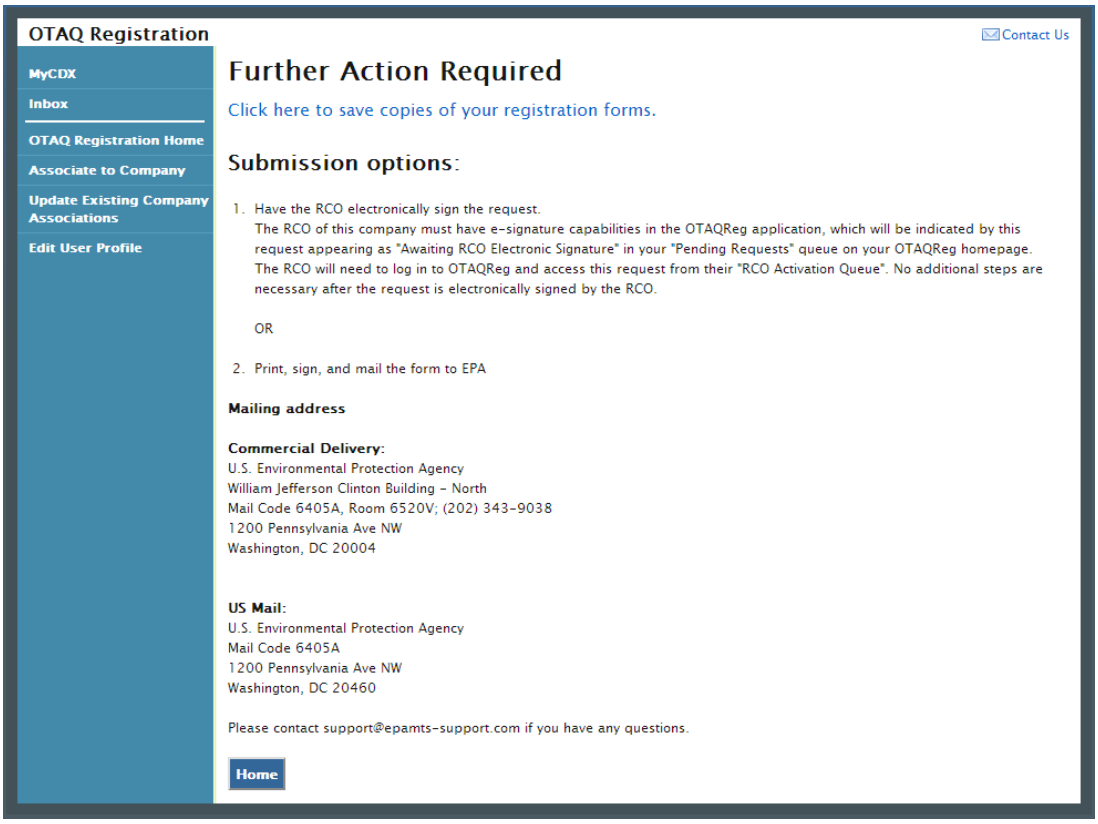
Click "OK" to Close the pop-up and continue to the next page. Figure 4-24 will display.

**Figure 4-24 Submit Request Page**




Click the "Submit" button to submit your request. Figure 4-25 will display.

**Figure 4-25 Further Action Required Page**




Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms after submitting your request. If you attempt to select the "Home" button without first saving a copy of your registration forms, a notification window will appear prompting you to first save your forms.

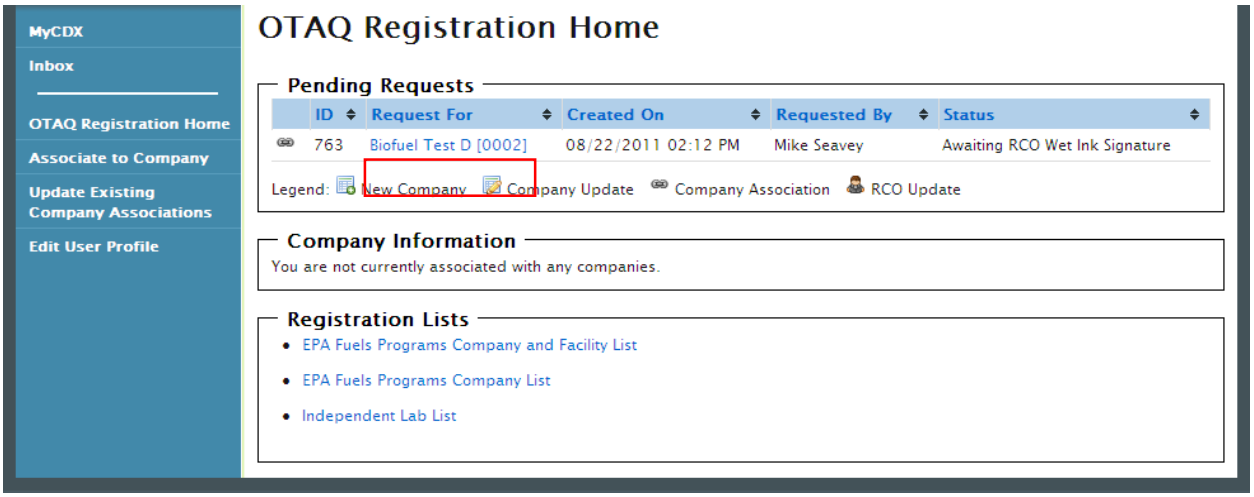
> **Note:** All Company Association Removal Requests require a signed User Association Termination Letter by your Company Responsible Corporate Officer. The User Association Termination Letter is included in the hard copy of your company association registration forms. This letter can be electronically signed by the RCO in OTAQReg if they have a valid CDX ESA.

Once you have submitted your Remove Company Association request, you will receive an email notification stating your request is awaiting RCO signature along with a hard copy of your company association registration forms. The updated company association request will appear in the pending requests section of your OTAQ Registration Home Page. Please refer to section 4.4 for information on viewing pending association requests.

## 4.4 Pending Company Association Requests

Congratulations! You have successfully submitted your Company Association Request in the OTAQReg application. As shown in Figure 4-26, your request will be displayed in your Pending Requests queue on your OTAQ Registration Home Page along with its current status.

**Figure 4-26 Pending Company Association Requests**




To view a pendin on Request, click the "Company Name" link for a request in the Pending R Company Association icon . Figure 4-27 will display.

**- mpany Association Request**

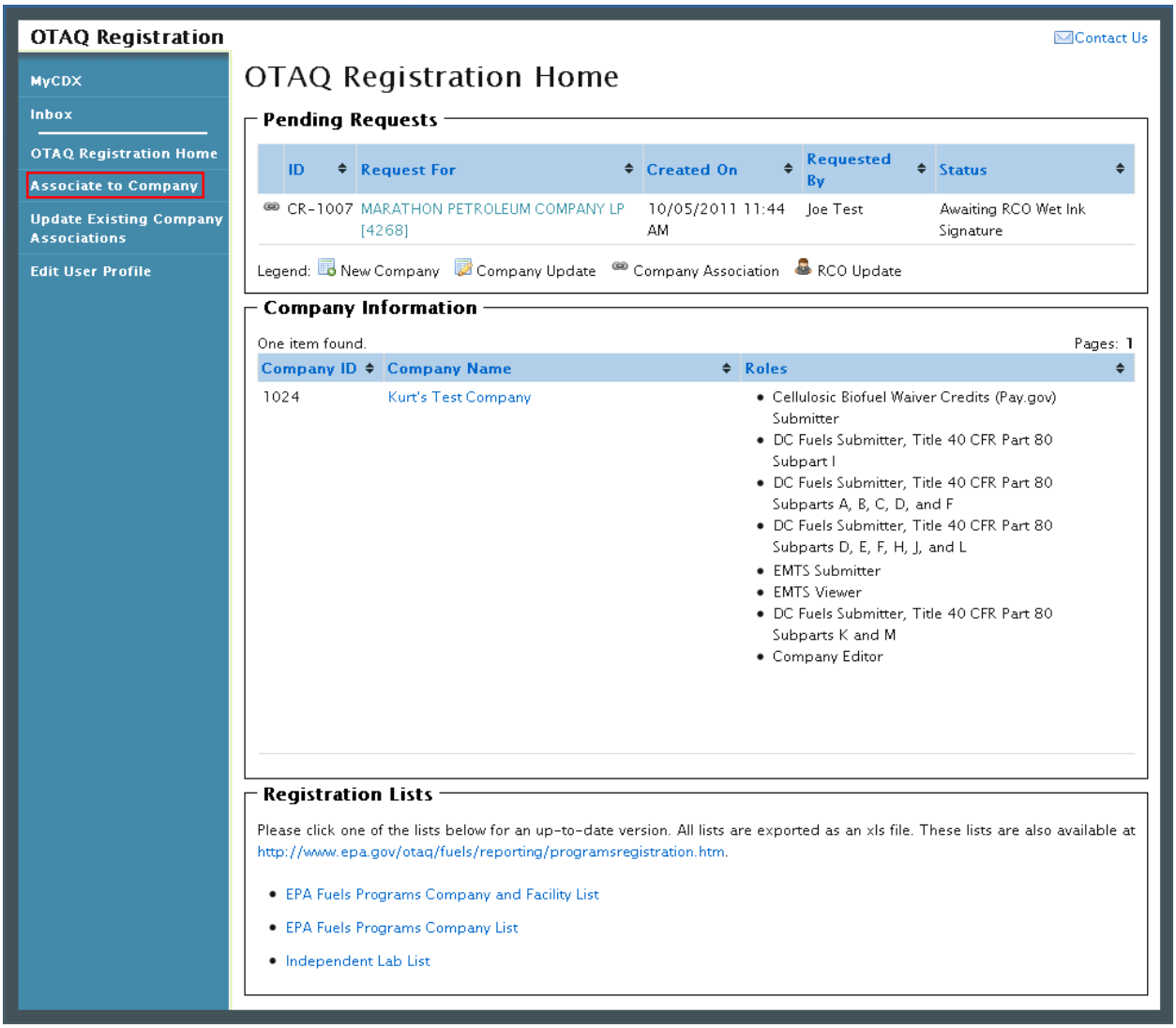
The Company Association Request page displays all request information. To return to the OTAQReg Home Page click the "Return" button.

To cancel the Company Association Request, click the "Cancel Request" button. A notification window will appear, prompting you to select the "Yes" button to continue with the request cancellation or the "No" button to return to the previous page. The request will be canceled immediately and will no longer display in the Pending Requests queue.

# 5 Create New Company

The following sections describe how to create a new company in the OTAQReg application.

**Figure 5-1 OTAQ Registration Home Page**




Click the "Associate to Company" link in the left side toolbar of your OTAQ Registration Home Page as seen in Figure 5-1. Figure 5-2 will display.

## 5.1 Verify Company Does Not Exist in OTAQReg

**Figure 5-2 Associate to Company: Search for Existing Company Page**

Before you can create a new company, you must first confirm that the company you intend to create does not already exist in OTAQReg. Enter search criteria pertinent to your company and click the "Search" button, as seen in Figure 5-2. Figure 5-3 will display.

Please note, search terms act together to narrow results. For example, searching on the state New York and the city New will return all companies located in New York State that have New in their city's name. It is recommended that companies use broad searches to avoid delays and registration issues caused by a user attempting to duplicate a company registration.

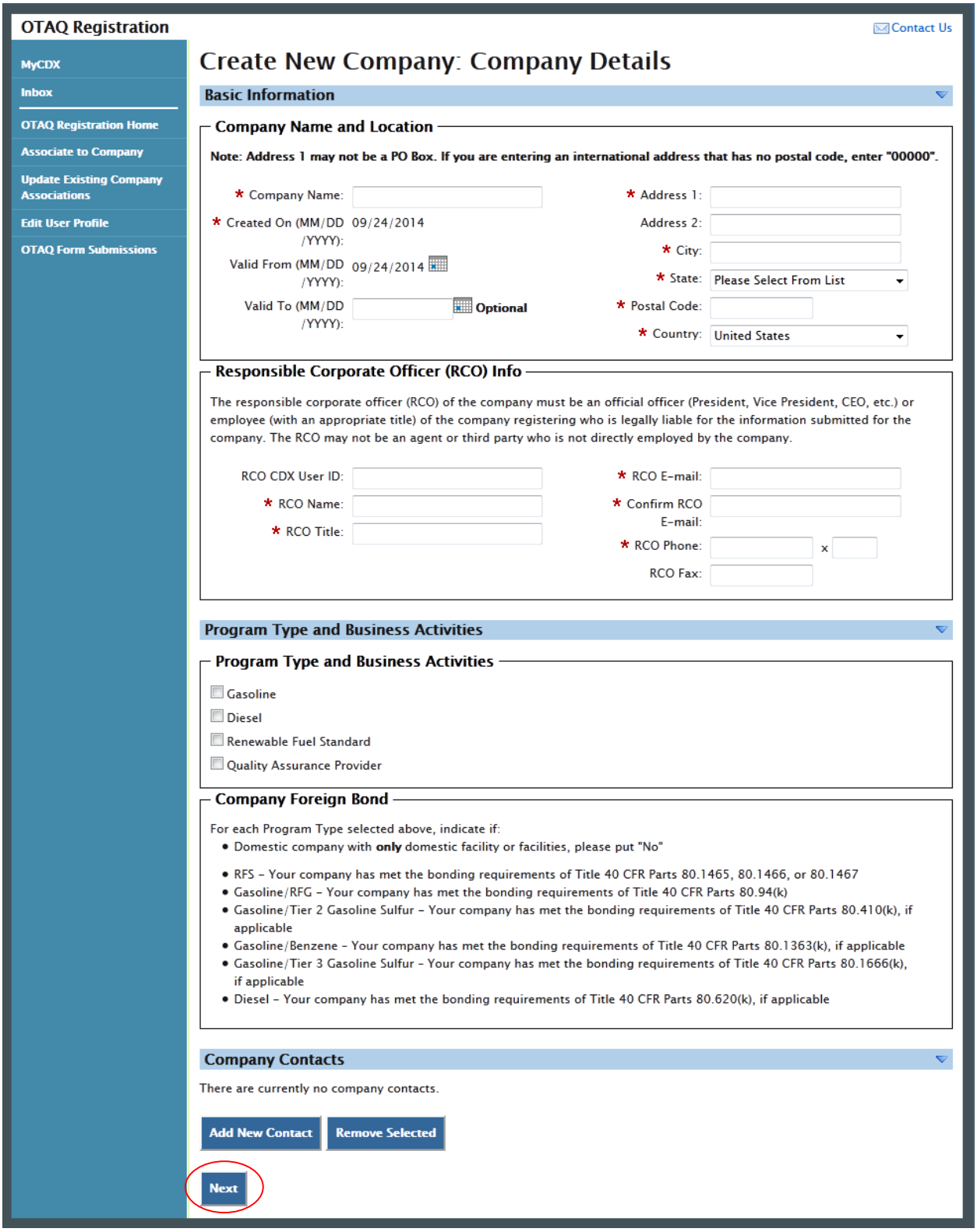
**Figure 5-3 Associate to Company: Search for Existing Company Results**

The page will return a list of companies matching the provided search criteria. If your company is displayed in the search results then please refer to Section 4.1 for instructions on how to associate to an existing company.

If it is determined that your company does not currently exist in OTAQReg, click the "Create New Company" button. Figure 5-4 will display.

## 5.2 Create Company Details

**Figure 5-4 Create New Company: Company Details Page**

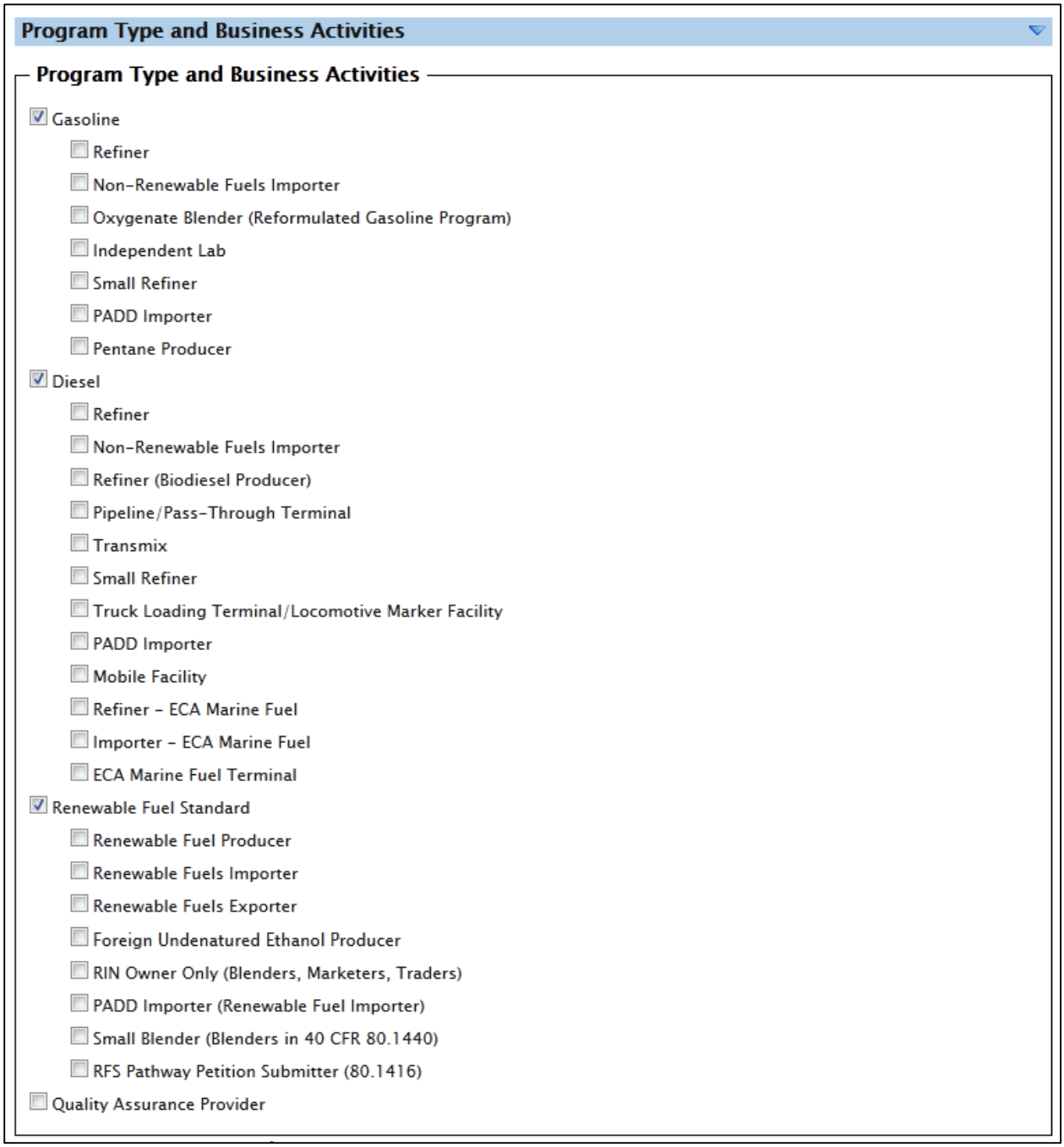


The Create New Company: Company Details page displays fields for you to provide the Company Name, Location, Responsible Corporate Officer information, Program Types, Business Activities, Company Contacts, and other required company details.

Enter information for all required fields. Required fields are marked with a red star.

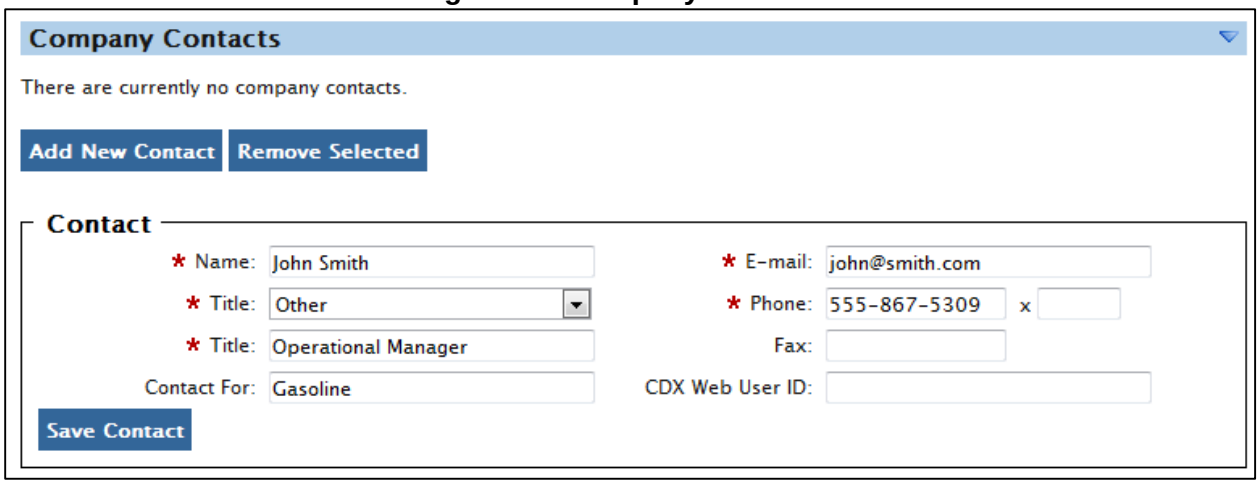
The Business Activities associated to each Program Type are displayed once a Program Type is selected, as shown in Figure 5-5.

**Figure 5-5 Program Types and Business Activities**



To add a company contact, click the “Add New Contact” button. Figure 5-6 will display.

**Figure 5-6 Company Contacts**

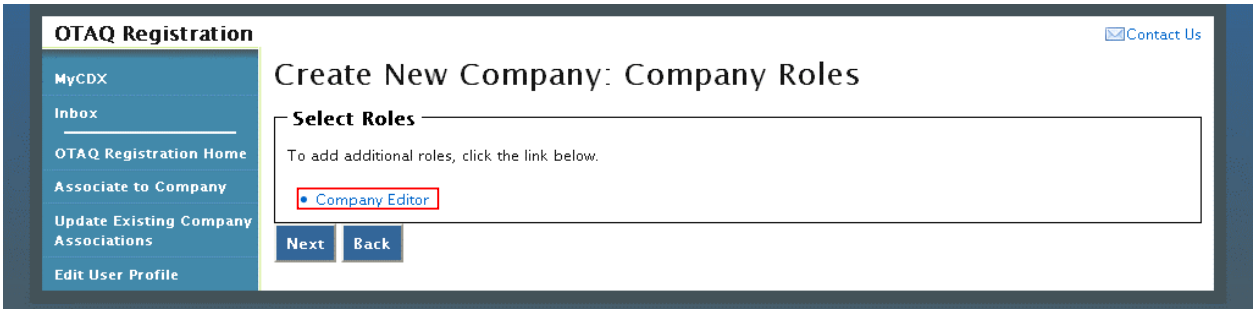



Enter information in all required fields by typing in the textboxes. Click the “Save Contact” button. The contact will now be listed in the company details.

After you have provided your complete company details, click the “Next” button. Figure 5-7 will display.

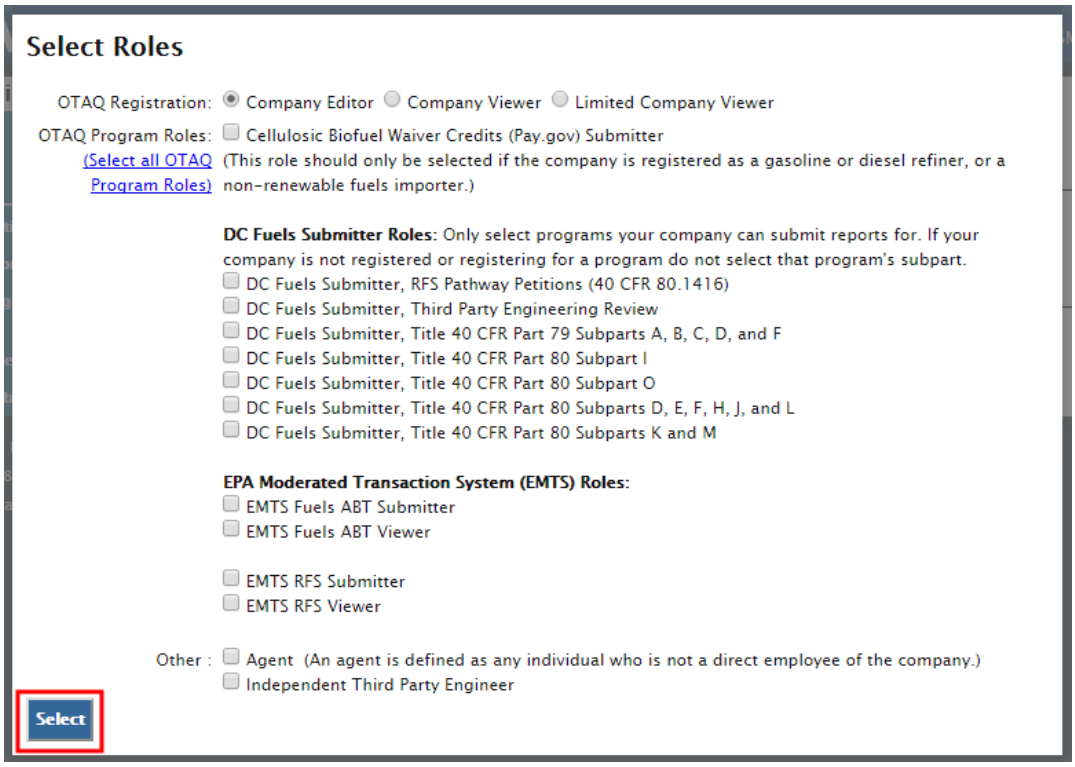
### 5.2.1 Select Company Roles

**Figure 5-7 Create New Company: Company Roles**



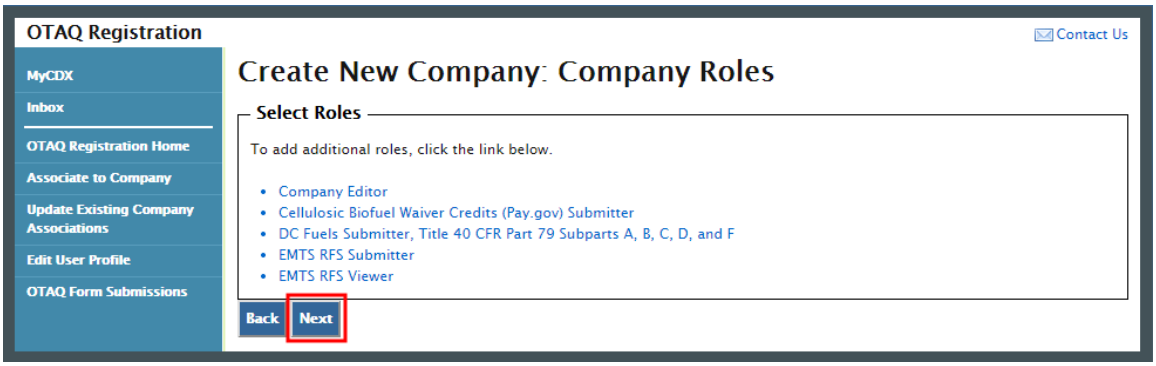

As the creator of a company, the Company Editor role is pre-selected for you. Click the “Company Editor” link to add additional roles. Figure 5-8 will display.

**Figure 5-8 Company Roles Pop-Up**




Choose the appropriate OTAQ Registration and OTAQ Program roles by selecting the corresponding radio button and checkboxes (reference Appendix A: OTAQ Registration Roles if you are unsure which roles to select). You may select only one OTAQ Registration role however multiple OTAQ Program roles are allowed. Click the "Select All" link to select all OTAQ Program Roles. Figure 5-9 will display.

**Figure 5-9 Selected Company Roles**

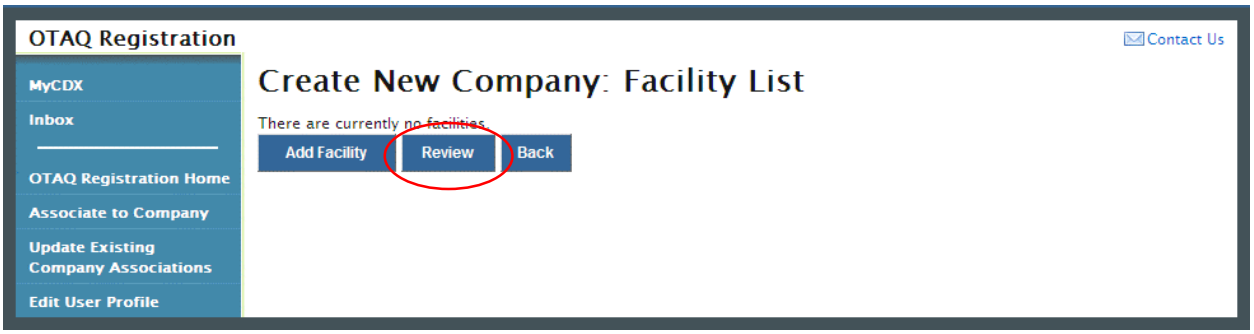



Click the "Next" button. Figure 5-10 will display.

## 5.3 Adding Company Facilities

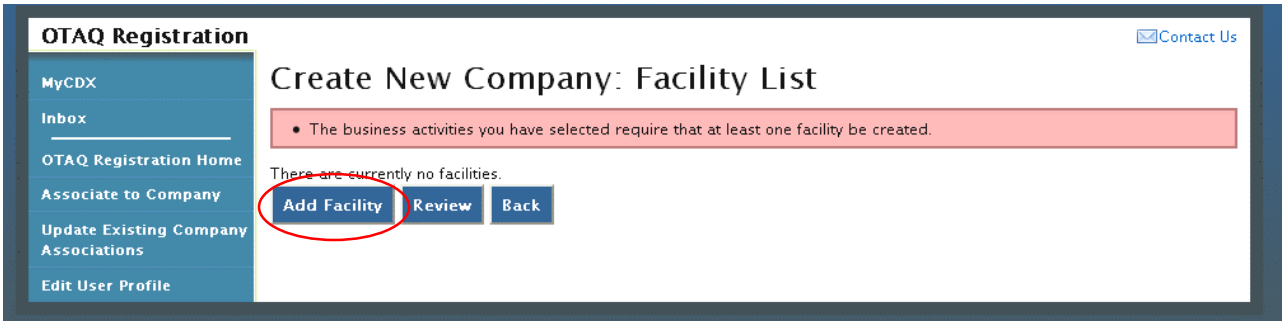
Your company may or may not require that you add a Facility depending on the Program Types and Business Activities selected for your company.

**Figure 5-10 Create New Company: Facility List**



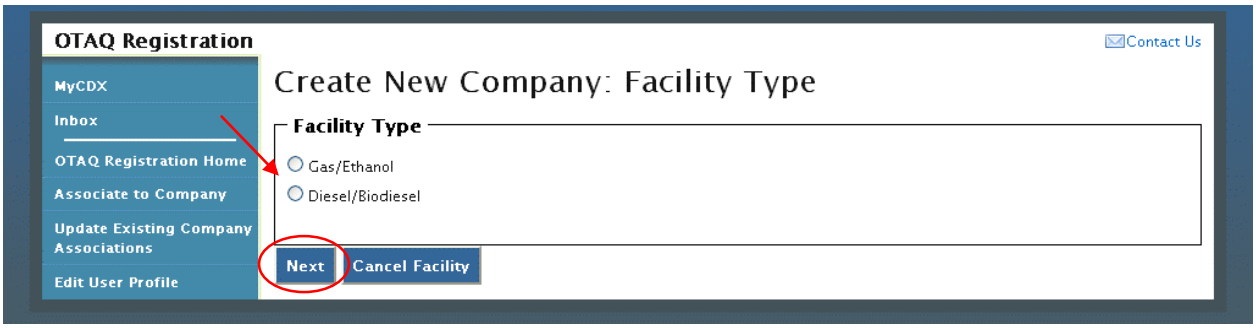

Click the "Review" button. Figure 5-11 will display if your company is required to have at least one facility. If your company is not required to have at least one facility then you will be directed to the Create New Company Review page, as shown in Figure 5-23 (continue to Section 5.5).

**Figure 5-11 Create New Company: Facility List Requires Facility**




To add a facility to your company click the "Add Facility" button. Figure 5-12 will display.

**Figure 5-12 Create New Company: Facility Type**




The Facility Types are pre-populated on the page based on the Program Type(s) and Business Activity(s) you selected for your company. Select the radio button next to the appropriate facility type you wish to add and click the "Next" button. Figure 5-13 will display. (Note: if your facility processes both diesel/biodiesel and gas/ethanol, it will be necessary to create two facilities with the same address and different facility types.)

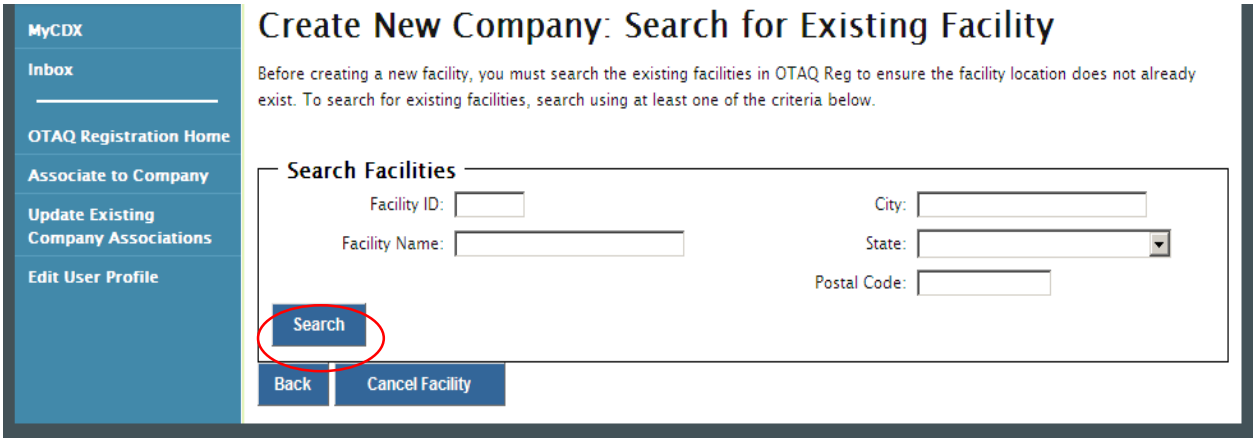
**Note:** You may cancel adding a facility at any time by selecting the "Cancel Facility" button.

**Figure 5-13 Create New Company: Facility Activities**

The Facility Activities are pre-populated onto the page based on the Program Type(s), Business Activity(s), and Facility Type you selected. Click the checkbox next to all applicable facility activities and click the "Next" button. Figure 5-14 will display.

## 5.4 Verify Facility Does Not Exist in OTAQReg

**Figure 5-14 Create New Company: Search for Existing Facility**




Before you can create a new facility, you must first confirm the facility you intend to create does not already exist in the OTAQReg application. To confirm whether or not your facility already exists in OTAQReg, search for your facility by providing search criteria into the facility search fields. Click the "Search" button. Figure 5-15 will display.

Please note, search terms act together to narrow results. For example, searching on the state New York and the city New will return all facilities located in New York State that have New in their city's name. It is recommended that companies use broad searches to avoid delays and registration issues caused by a user attempting to duplicate a facility registration.

**Figure 5-15 Facility Search Results**

The page will return a list of facilities matching the provided search criteria. If your facility is displayed in the search results then please refer to Section 5.4.1.2 for instructions on how to add an existing facility.

If it is determined that your facility does not currently exist in OTAQReg, click the "Create New Facility" button. Figure 5-16 will display.

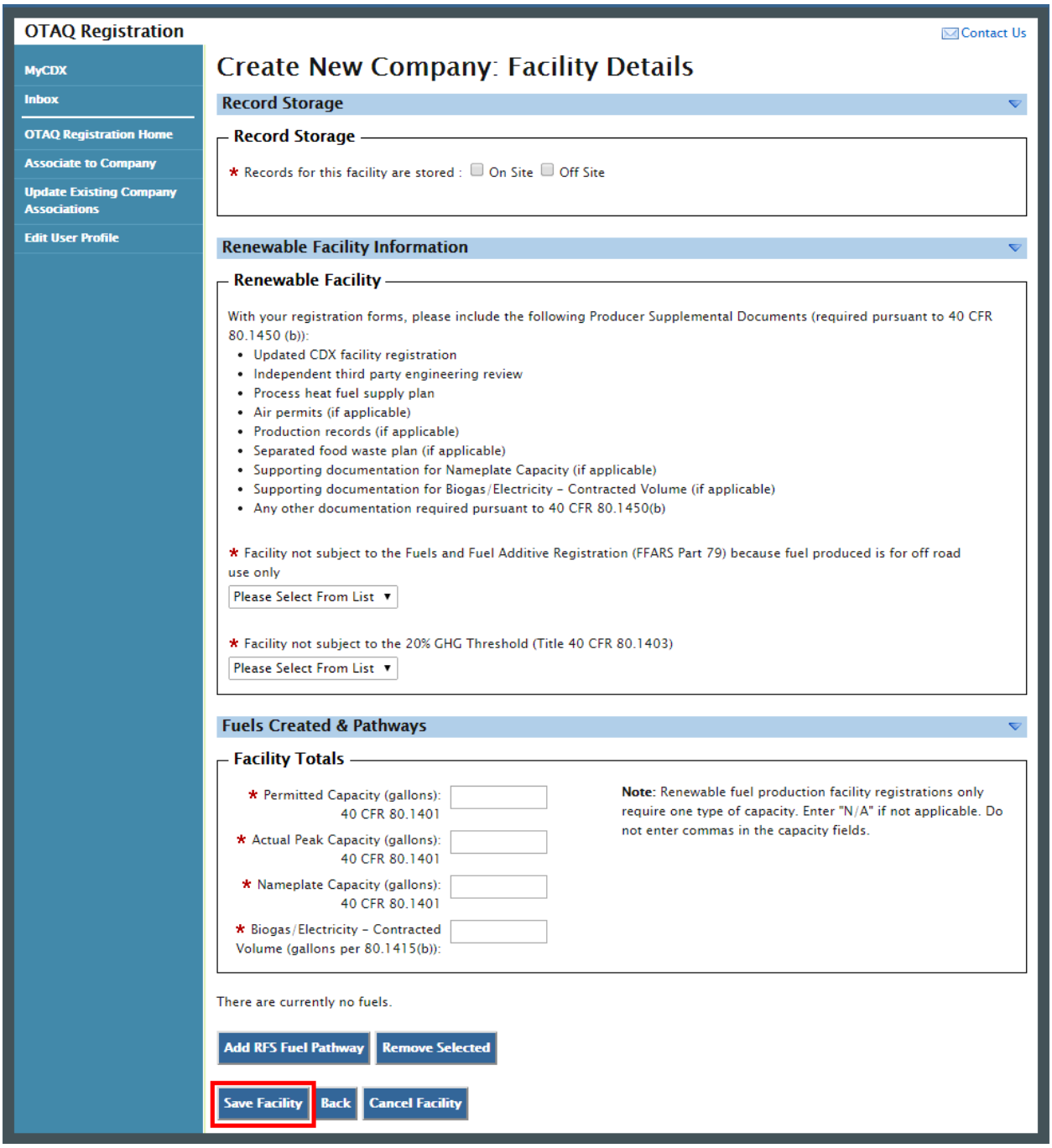
### 5.4.1.1 Create New Facility

**Figure 5-16 Create New Company: Basic Facility Details**

Enter information for all required fields. Required fields are identified with a red star. Click the "Next" button when finished. Figure 5-17 will display.

**Note:** Address 1 may not be a P.O. Box address. If you are entering an international address that has no postal code, enter "00000."

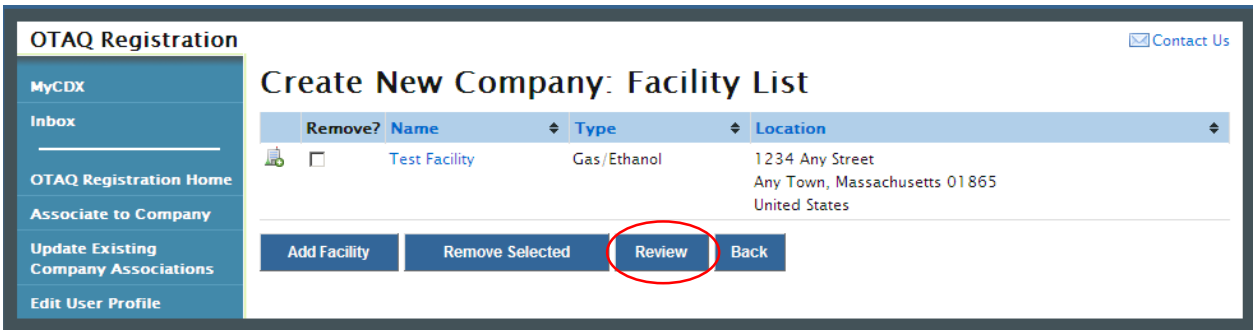
**Figure 5-17 Create New Company: Facility Details**




Enter information in all required fields by typing in the textboxes and selecting from available drop-down menus. The sections and required fields displayed on the Facility Details page will vary depending on the Facility Types and Facility Activities you previously selected for the facility.

Click the “Save Facility” button when finished. Figure 5-18 will display.

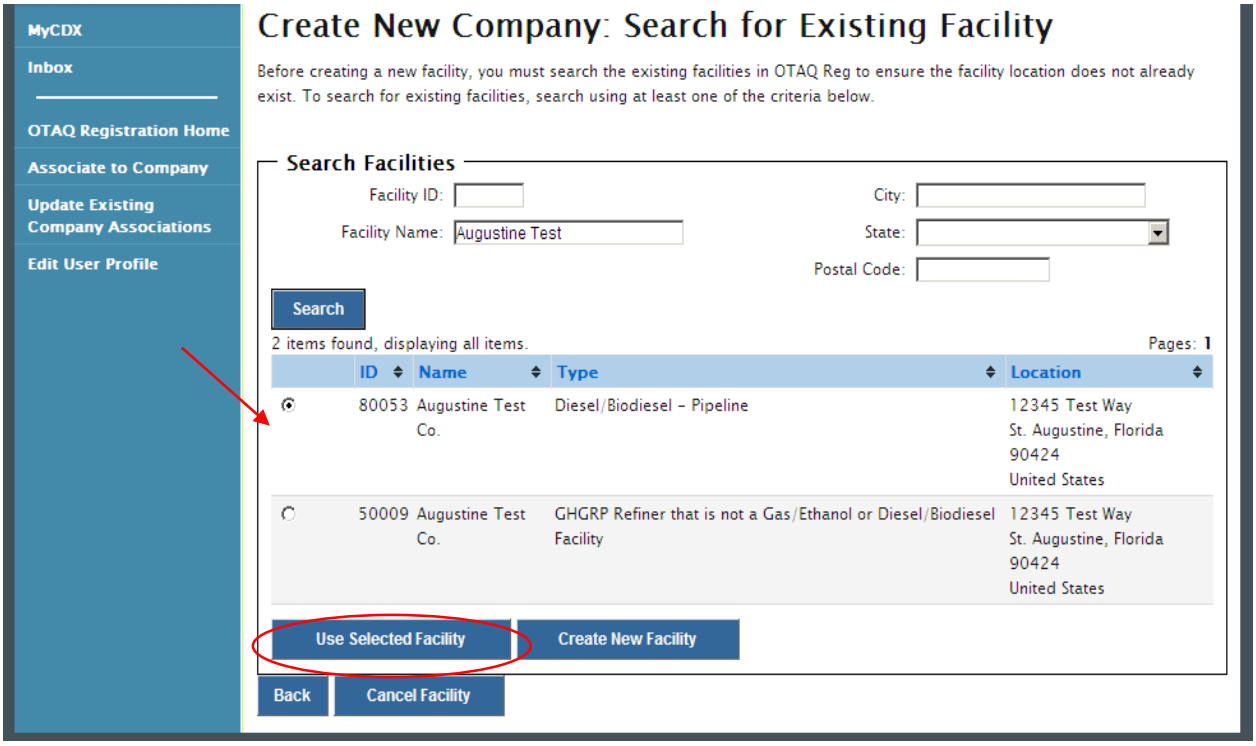
**Figure 5-18 Create New Company: Facility List**




If the displayed facility information is correct, click the “Review” button. Figure 5-23 will display (continue to Section 5.5).

### 5.4.1.2 Add Existing Facility

**Figure 5-19 Select Existing Facility**

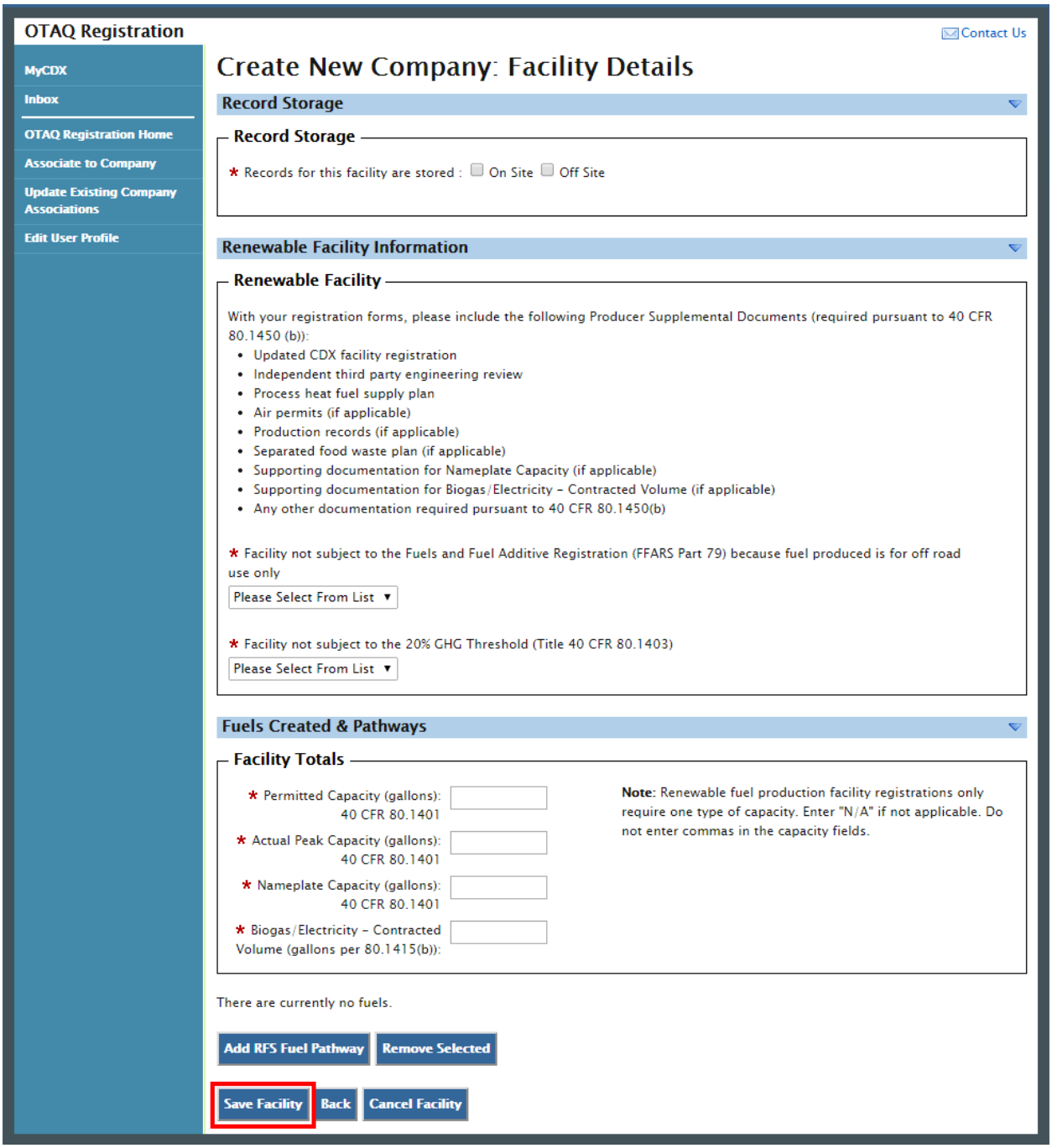



If it is determined that your Facility exists in OTAQReg, choose the desired facility by selecting the corresponding radio button and clicking the “Use Selected Facility” button, as seen in Figure 5-19. Figure 5-20 will display.

**Figure 5-20 Existing Facility Details**

The existing Facility Name and Location will be pre-populated on the page. The Facility Name field is editable however you are not able to edit the facility location for an existing facility. Provide information for all required fields and click the “Next” button. Figure 5-21 will display.

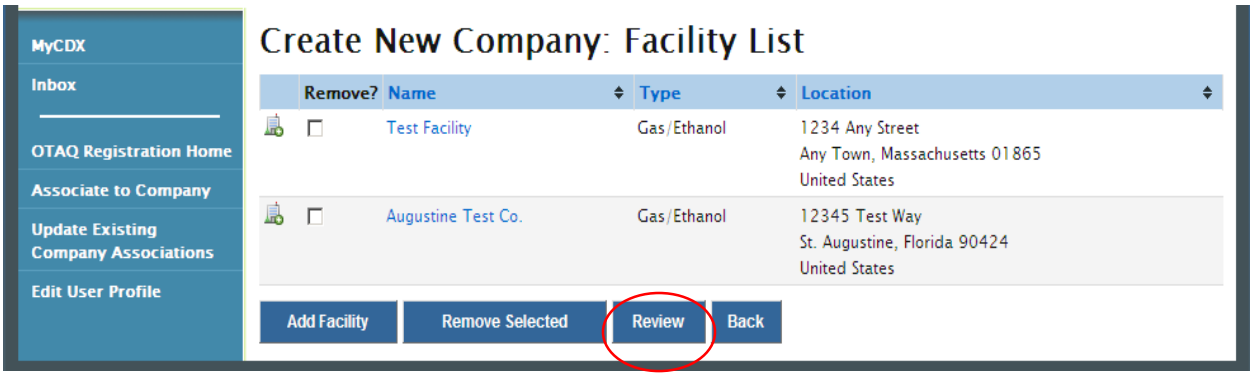
**Figure 5-21 Create Facility Details**




Enter information in all required fields by typing in the textboxes and selecting from available drop-down menus. The sections and required fields displayed on the Facility Details page will vary depending on the Facility Types and Facility Activities you previously selected for the facility.

Click the “Save Facility” button when finished. Figure 5-22 will display.

**Figure 5-22 Review Facility List**




If the displayed facility information is correct, click the "Review" button. Figure 5-23 will display.

## 5.5 Review and Submit New Company Information

**Figure 5-23 Create New Company: Review**

The Create New Company: Review page displays a read-only version of the company and facility details provided. If the new company information on the page is correct click the "Continue" button. Figure 5-24 will display.

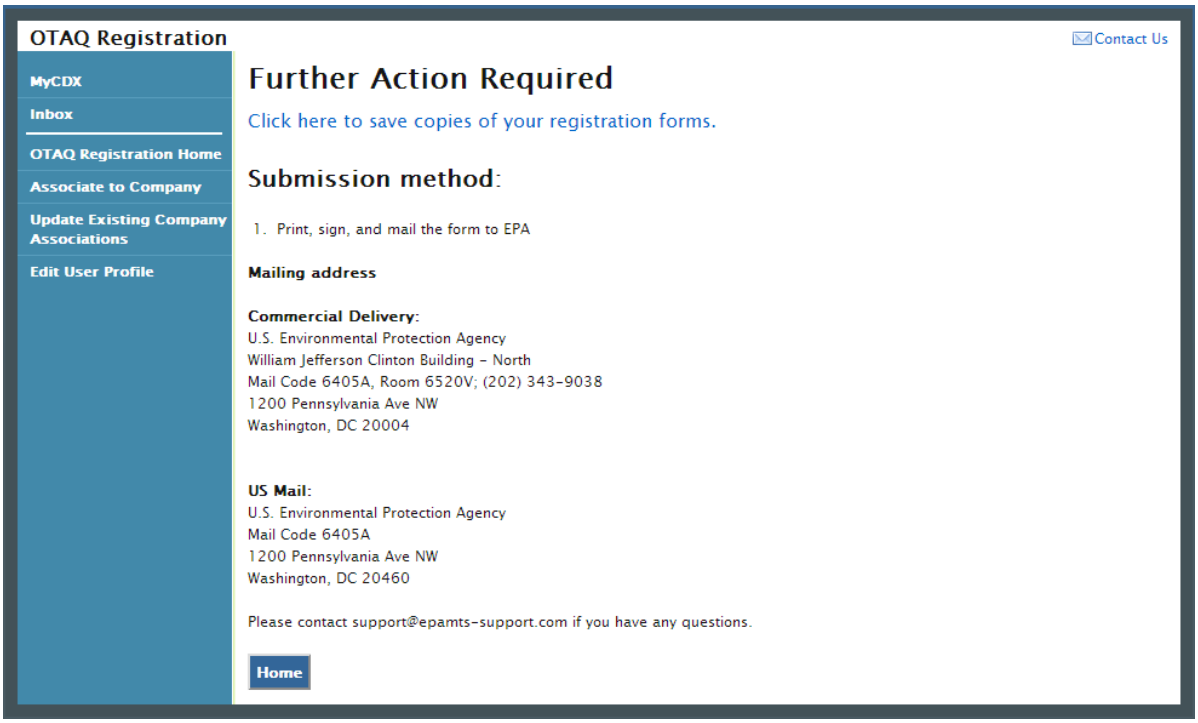
**Figure 5-24 Further Action Required Pop-up**

Click "OK" to Close the pop-up and continue to the next page. Figure 5-25 will display.

**Figure 5-25 Create New Company: Submit Request Page**

Click the "Submit" button to submit your request. Figure 5-26 will display.

**Figure 5-26 Further Action Required Page**




Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms after submitting your request. If you attempt to select the "Home" button without first saving a copy of your registration forms, a notification window will appear prompting you to first save your forms.

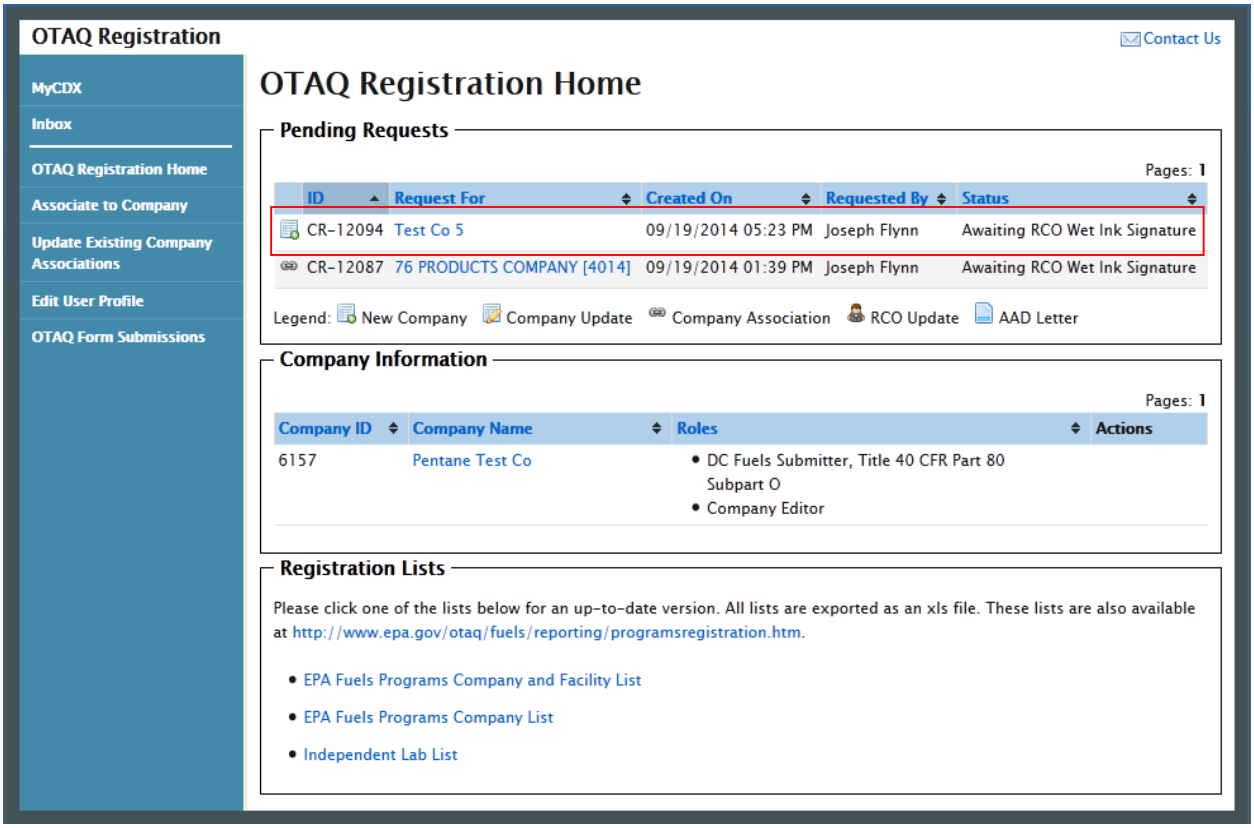
Once you have submitted your New Company Request, you will receive an email notification stating your new company is awaiting RCO signature. The company request will appear in the pending requests section of your OTAQ Registration Home Page, as shown in Figure 5-27.

> **Note:** All New Company requests require a signed RCO statement by your company's Responsible Corporate Officer. The RCO signature statement is included in the hard copy of your new company registration forms. New Company Requests cannot be electronically signed.

## 5.6 Pending New Company Requests

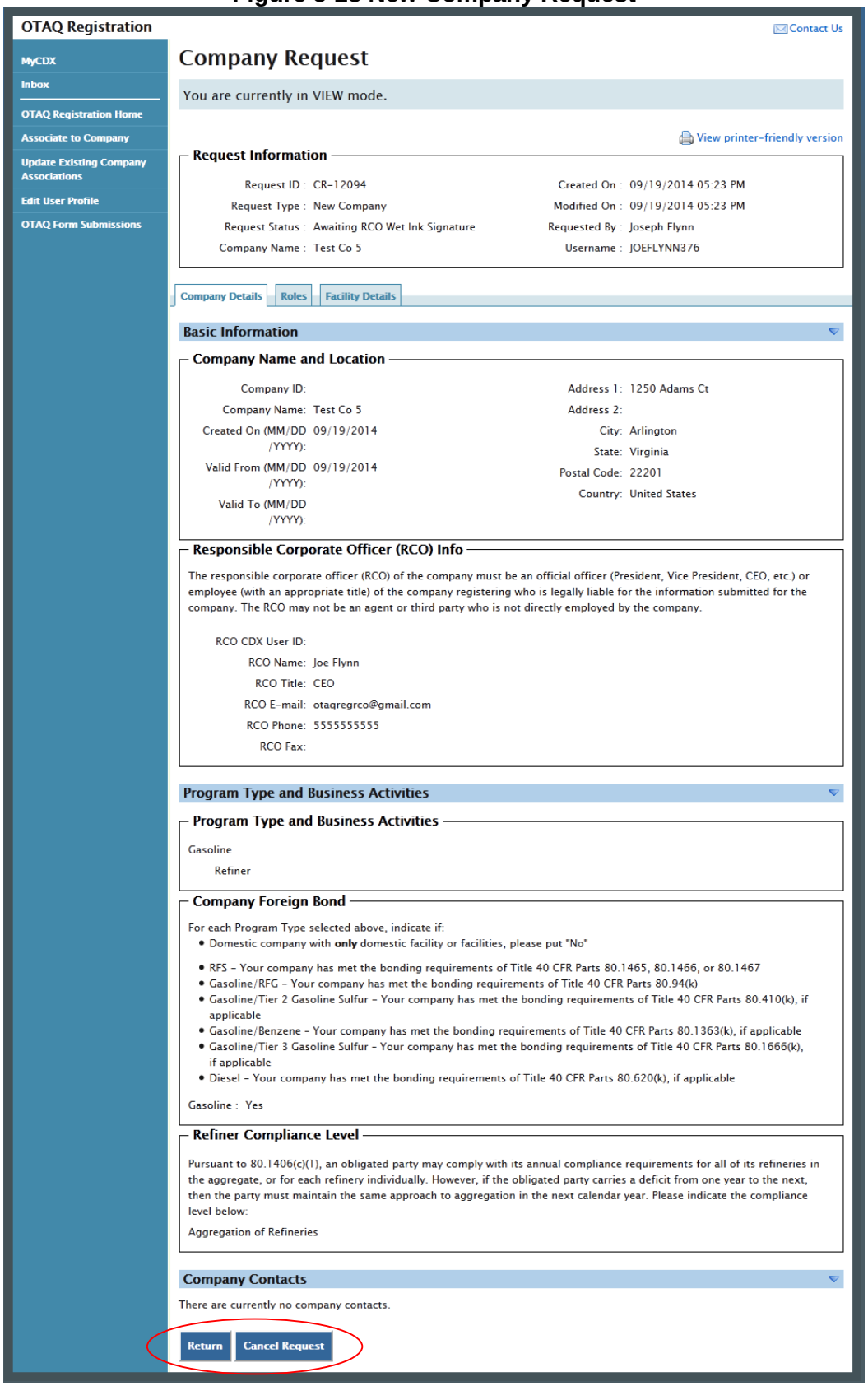
Congratulations! You have successfully submitted your New Company Request in the OTAQReg application. As shown in Figure 5-27, your request will be displayed in your Pending Requests queue on your OTAQ Registration Home Page along with its current status.

**Figure 5-27 OTAQ Registration Home page: Pending Requests**




To view a pending New Company Request, click the Company Name link in the Pending Requests Queue for a request identified with the New Company icon . Figure 5-28 will display.

## Figure 5-28 New Company Request



OTAQ Registration

Contact Us

MyCDX
Inbox
OTAQ Registration Home
Associate to Company
Update Existing Company Associations
Edit User Profile
OTAQ Form Submissions

# Company Request

You are currently in VIEW mode.

View printer-friendly version

**Request Information**

Request ID : CR-12094
Request Type : New Company
Request Status : Awaiting RCO Wet Ink Signature
Company Name : Test Co 5
Created On : 09/19/2014 05:23 PM
Modified On : 09/19/2014 05:23 PM
Requested By : Joseph Flynn
Username : JOEFLYNN376

Company Details | Roles | Facility Details

**Basic Information**

**Company Name and Location**

Company ID:
Company Name: Test Co 5
Created On (MM/DD /YYYY): 09/19/2014
Valid From (MM/DD /YYYY): 09/19/2014
Valid To (MM/DD /YYYY):
Address 1: 1250 Adams Ct
Address 2:
City: Arlington
State: Virginia
Postal Code: 22201
Country: United States

**Responsible Corporate Officer (RCO) Info**

The responsible corporate officer (RCO) of the company must be an official officer (President, Vice President, CEO, etc.) or employee (with an appropriate title) of the company registering who is legally liable for the information submitted for the company. The RCO may not be an agent or third party who is not directly employed by the company.

RCO CDX User ID:
RCO Name: Joe Flynn
RCO Title: CEO
RCO E-mail: otaqregrco@gmail.com
RCO Phone: 5555555555
RCO Fax:

**Program Type and Business Activities**

**Program Type and Business Activities**

Gasoline
Refiner

**Company Foreign Bond**

For each Program Type selected above, indicate if:

- Domestic company with **only** domestic facility or facilities, please put "No"
- RFS - Your company has met the bonding requirements of Title 40 CFR Parts 80.1465, 80.1466, or 80.1467
- Gasoline/RFG - Your company has met the bonding requirements of Title 40 CFR Parts 80.94(k)
- Gasoline/Tier 2 Gasoline Sulfur - Your company has met the bonding requirements of Title 40 CFR Parts 80.410(k), if applicable
- Gasoline/Benzene - Your company has met the bonding requirements of Title 40 CFR Parts 80.1363(k), if applicable
- Gasoline/Tier 3 Gasoline Sulfur - Your company has met the bonding requirements of Title 40 CFR Parts 80.1666(k), if applicable
- Diesel - Your company has met the bonding requirements of Title 40 CFR Parts 80.620(k), if applicable

Gasoline : Yes

**Refiner Compliance Level**

Pursuant to 80.1406(c)(1), an obligated party may comply with its annual compliance requirements for all of its refineries in the aggregate, or for each refinery individually. However, if the obligated party carries a deficit from one year to the next, then the party must maintain the same approach to aggregation in the next calendar year. Please indicate the compliance level below:

Aggregation of Refineries

**Company Contacts**

There are currently no company contacts.

Return | Cancel Request

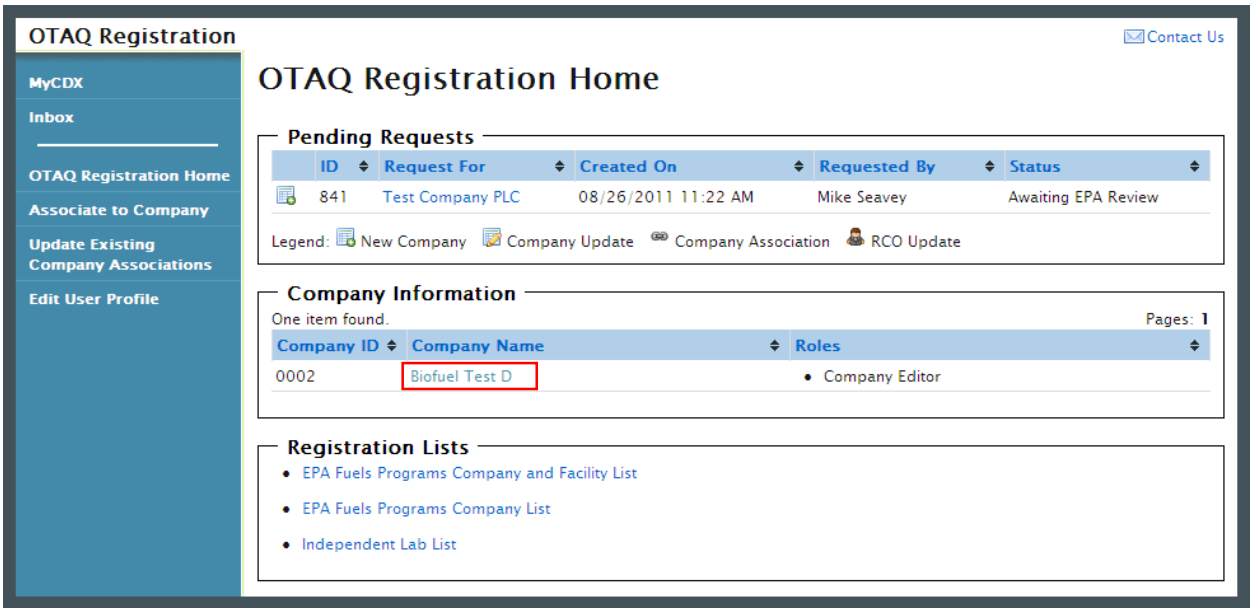
The New Company Request page displays all of the company's information. To return to the OTAQReg Home Page click the "Return" button.

To cancel the New Company Request, click the "Cancel Request" button. A notification window will appear, prompting you to select the "Yes" button to continue with the request cancellation or the "No" button to return to the previous page. The request will be canceled immediately and will no longer display in the Pending Requests queue.

# 6 View Company Details

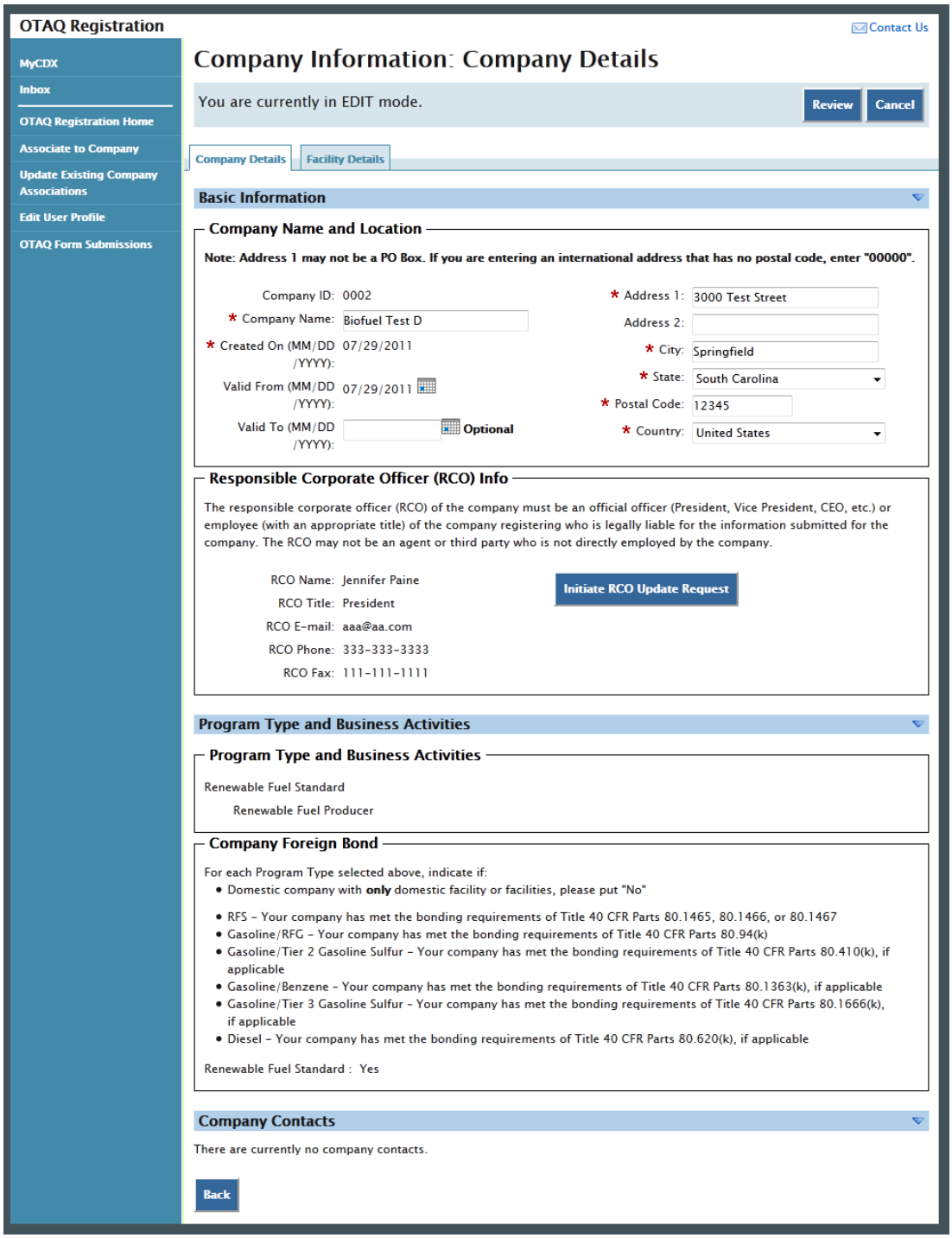
The following section describes how to view company details in the OTAQReg application.

**Figure 6-1 OTAQ Registration Home Page**




To view a company's details, navigate to your OTAQ Registration Home Page and click the Company Name link for a company with which you have an active role, as seen in Figure 6-1. The company details will display, as shown in Figure 6-2.

**Figure 6-2 Company Information: Company Details**




The level of company information displayed depends on your OTAQ Registration role for the company. Please reference Appendix A: OTAQ Registration Roles for further information on the OTAQ Registration Roles and their designated rights.

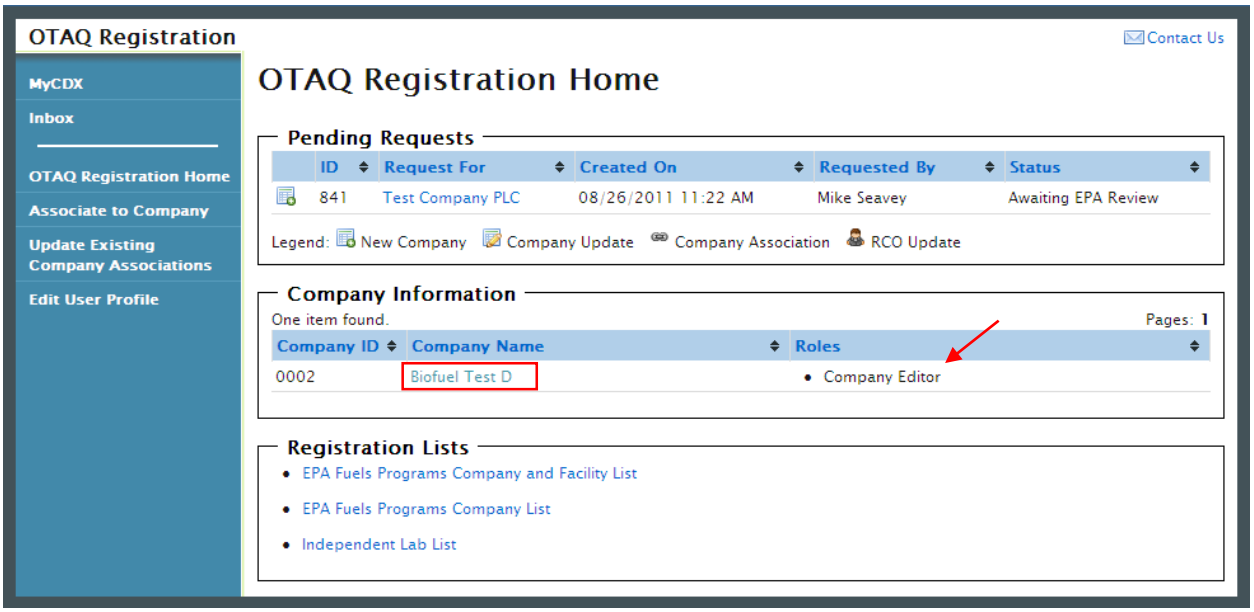
# 7 Edit Company Details

The following sections describe how to edit company details in the OTAQReg application.

**Note:** You **MUST** have the **Company Editor** role for your company to edit company details.

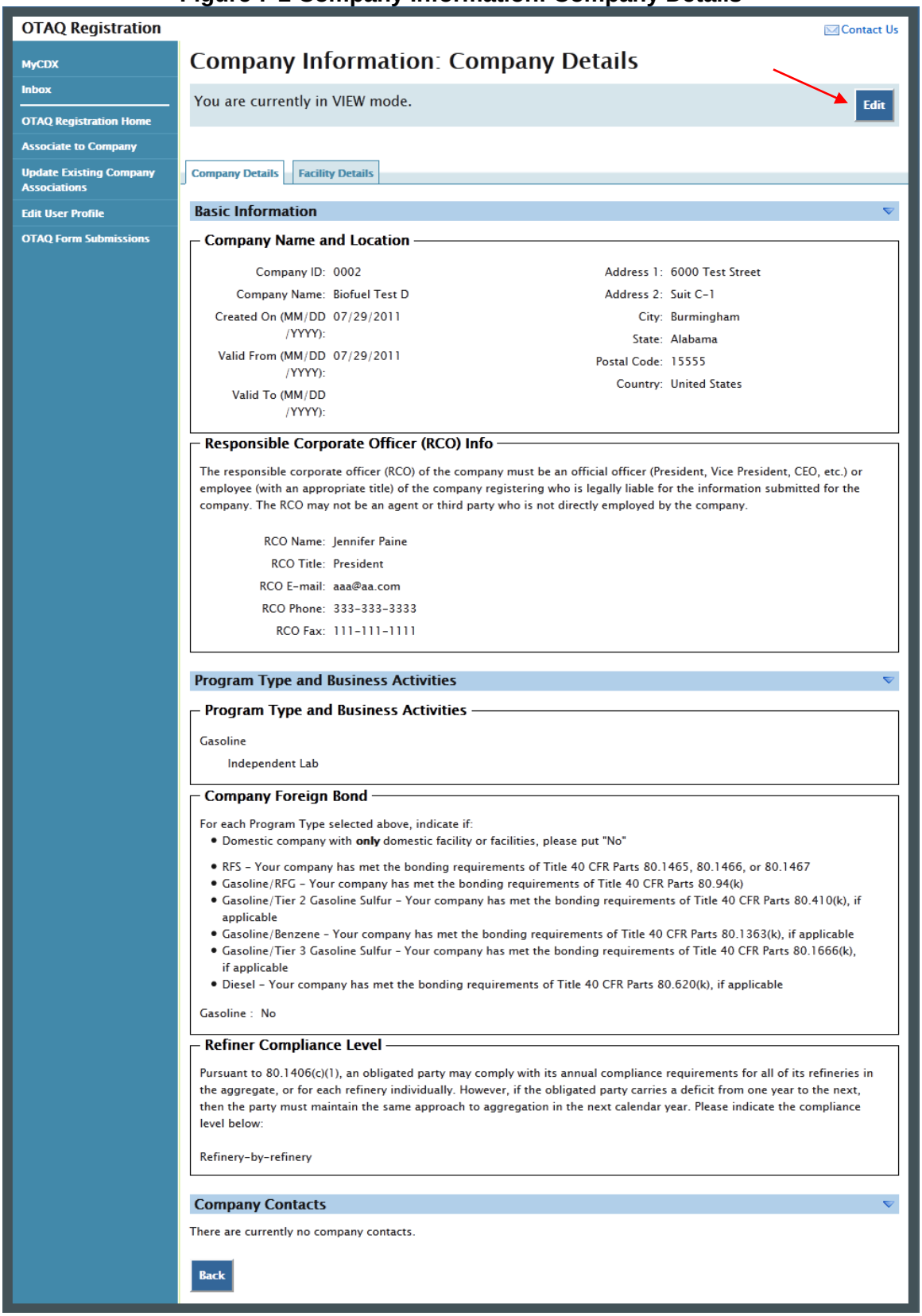
## 7.1 Edit Company Details

**Figure 7-1 OTAQ Registration Home Page**




To edit a company's details, navigate to your OTAQ Registration Home Page and click the Company Name link for a company with which you have an active Company Editor role, as seen in Figure 7-1. Figure 7-2 will display.

**Figure 7-2 Company Information: Company Details**



OTAQ Registration

Contact Us

MyCDX
Inbox
OTAQ Registration Home
Associate to Company
Update Existing Company Associations
Edit User Profile
OTAQ Form Submissions

## Company Information: Company Details

You are currently in VIEW mode. Edit

Company Details | Facility Details

### Basic Information

#### Company Name and Location

Company ID: 0002
Company Name: Biofuel Test D
Created On (MM/DD/YYYY): 07/29/2011
Valid From (MM/DD/YYYY): 07/29/2011
Valid To (MM/DD/YYYY):

Address 1: 6000 Test Street
Address 2: Suit C-1
City: Burmingham
State: Alabama
Postal Code: 15555
Country: United States

#### Responsible Corporate Officer (RCO) Info

The responsible corporate officer (RCO) of the company must be an official officer (President, Vice President, CEO, etc.) or employee (with an appropriate title) of the company registering who is legally liable for the information submitted for the company. The RCO may not be an agent or third party who is not directly employed by the company.

RCO Name: Jennifer Paine
RCO Title: President
RCO E-mail: aaa@aa.com
RCO Phone: 333-333-3333
RCO Fax: 111-111-1111

### Program Type and Business Activities

#### Program Type and Business Activities

Gasoline
Independent Lab

#### Company Foreign Bond

For each Program Type selected above, indicate if:

- Domestic company with **only** domestic facility or facilities, please put "No"
- RFS - Your company has met the bonding requirements of Title 40 CFR Parts 80.1465, 80.1466, or 80.1467
- Gasoline/RFG - Your company has met the bonding requirements of Title 40 CFR Parts 80.94(k)
- Gasoline/Tier 2 Gasoline Sulfur - Your company has met the bonding requirements of Title 40 CFR Parts 80.410(k), if applicable
- Gasoline/Benzene - Your company has met the bonding requirements of Title 40 CFR Parts 80.1363(k), if applicable
- Gasoline/Tier 3 Gasoline Sulfur - Your company has met the bonding requirements of Title 40 CFR Parts 80.1666(k), if applicable
- Diesel - Your company has met the bonding requirements of Title 40 CFR Parts 80.620(k), if applicable

Gasoline : No

#### Refiner Compliance Level

Pursuant to 80.1406(c)(1), an obligated party may comply with its annual compliance requirements for all of its refineries in the aggregate, or for each refinery individually. However, if the obligated party carries a deficit from one year to the next, then the party must maintain the same approach to aggregation in the next calendar year. Please indicate the compliance level below:

Refinery-by-refinery

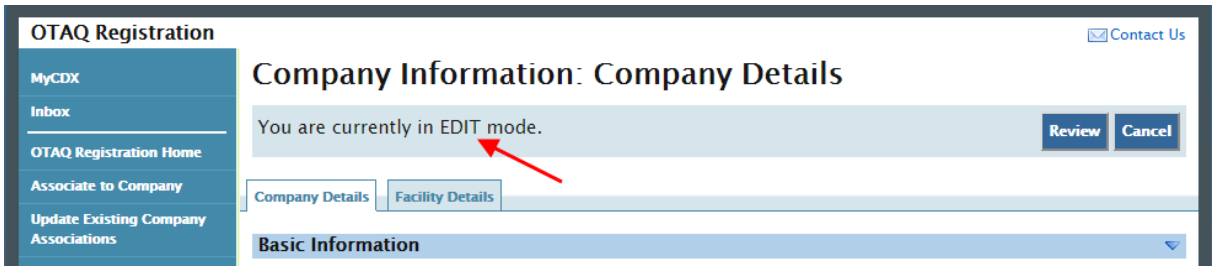
### Company Contacts

There are currently no company contacts.

Back

The top of the page states, “You are currently in VIEW mode.” Click the “Edit” button located on the top right side of the page. Figure 7-3 will display.

**Figure 7-3 Company Details Edit Page**




The page will now state, “You are currently in EDIT mode.”

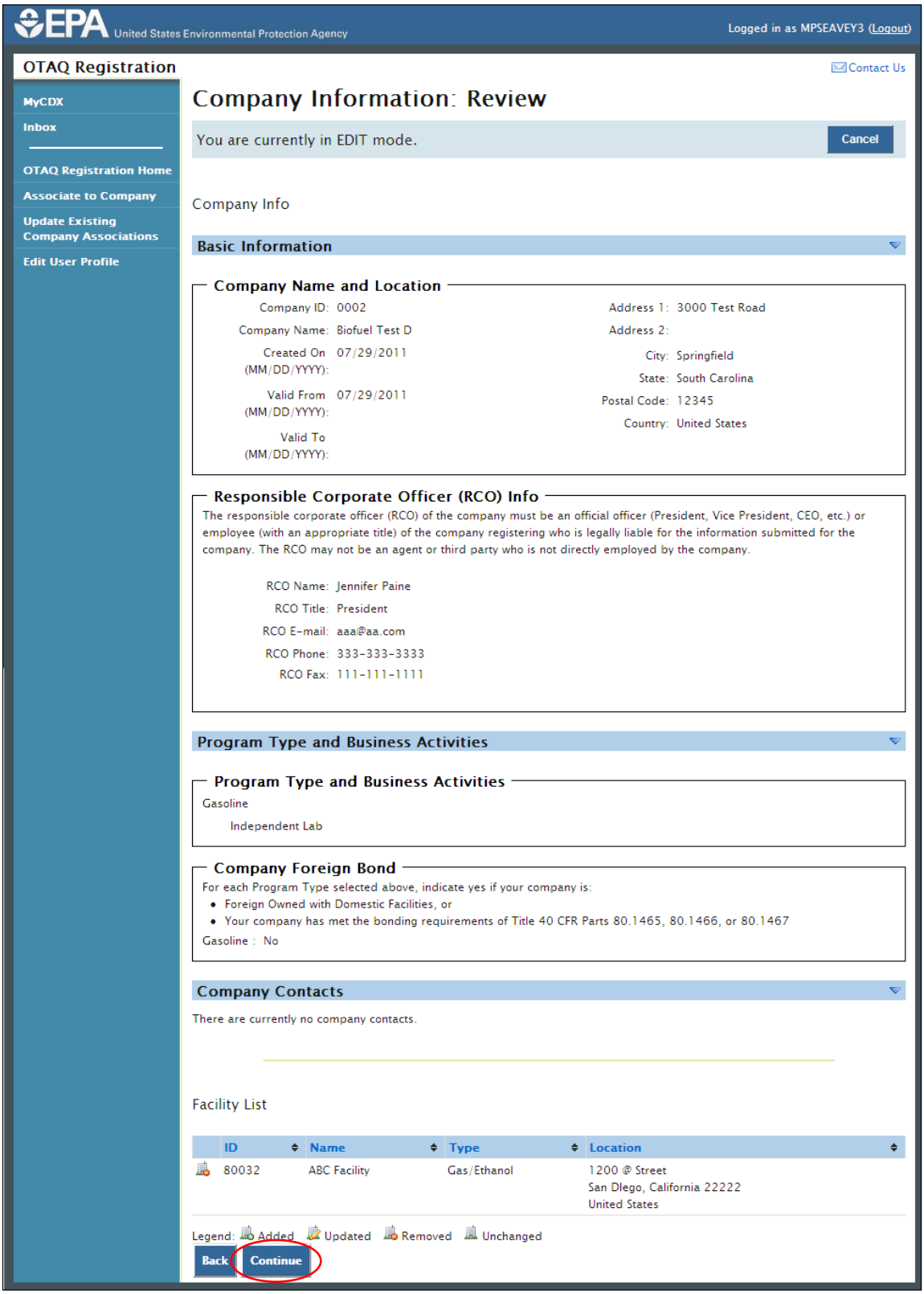
Edit the company information by typing in the textboxes, selecting new checkboxes, and/or selecting new radio buttons. The company’s facility details and RCO information may also be updated. Information on how to edit these pieces of information can be found in Sections 7.4 and 7.6 respectively.

When all updates have been made, click the “Review” button. Figure 7-4 will display.

**Note:** If the company edits contain changes to the company’s Program Types and Business Activities that have specific facility requirements, you will be prompted with an error message to edit the Facility Information accordingly.

## 7.2 Review Company Details Changes

**Figure 7-4 Company Information: Review**

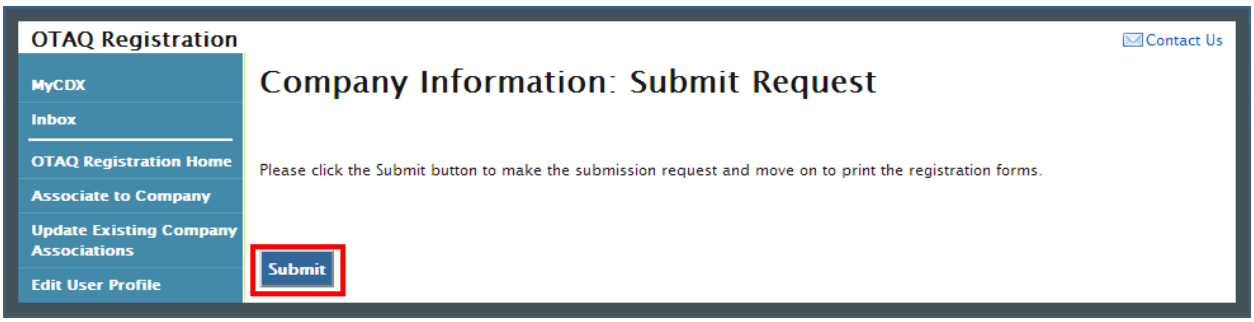


The Company Information Review page displays a read-only version of the updated company record. If the information displayed on the review screen is correct, click the “Continue” button. Figure 7-5 will display.

**Figure 7-5 Further Action Required Pop-up**

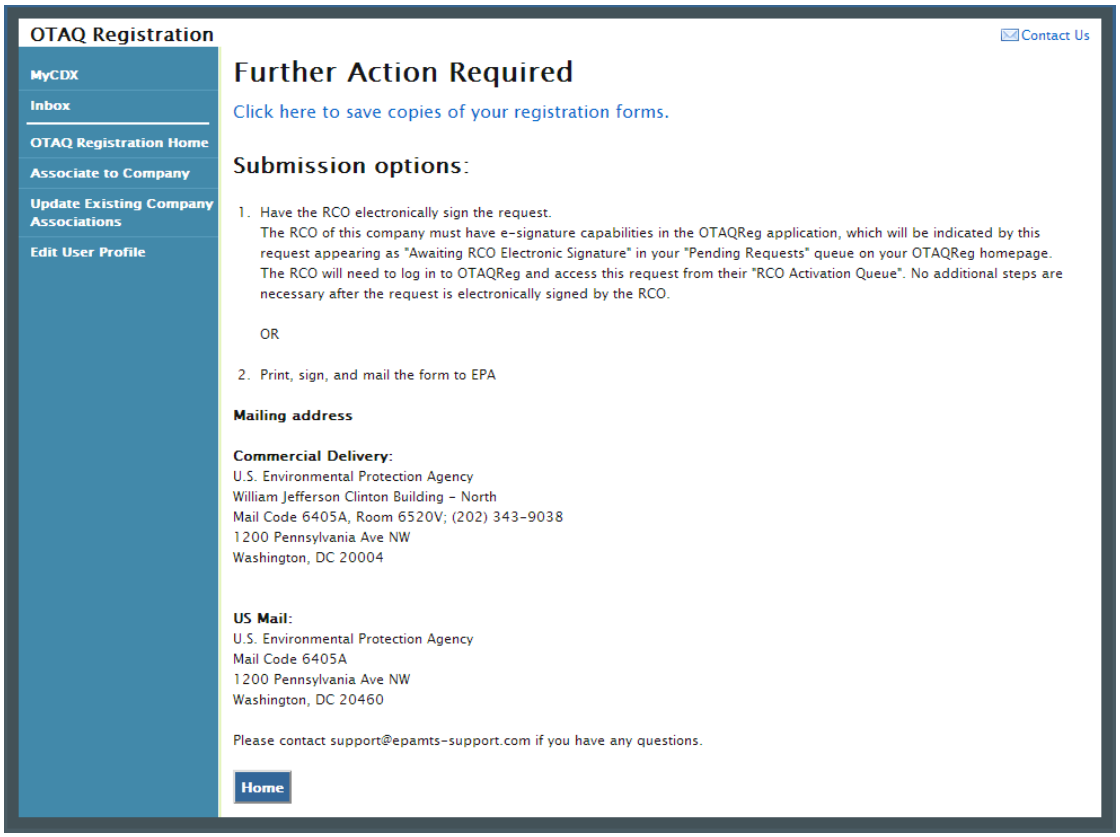
Click “OK” to Close the pop-up and continue to the next page. Figure 7-6 will display.

**Figure 7-6 Company Information: Submit Request Page**




Click the “Submit” button to submit your request. Figure 7-7 will display.

**Figure 7-7 Further Action Required Page**




Click the “Click here to save copies of your registration forms” link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms after submitting your request. If you attempt to select the “Home” button without first saving a copy of your registration forms, a notification window will appear prompting you to first save your forms.

Once you have submitted your Company Update request, you will receive an email notification stating your company update request is awaiting RCO signature along with a hard copy of your company update registration forms.

The request will also be listed in the pending requests section of your OTAQ Registration Home Page, as shown in Figure 7-8. Company Updates must be signed by the Company RCO and approved by EPA.

**Note:** All Company Update requests require a signed RCO statement by your Company’s Responsible Corporate Officer. The RCO signature statement is included in the hard copy of your company update registration forms. This letter can be electronically signed by the RCO in OTAQReg if they have a valid CDX ESA.

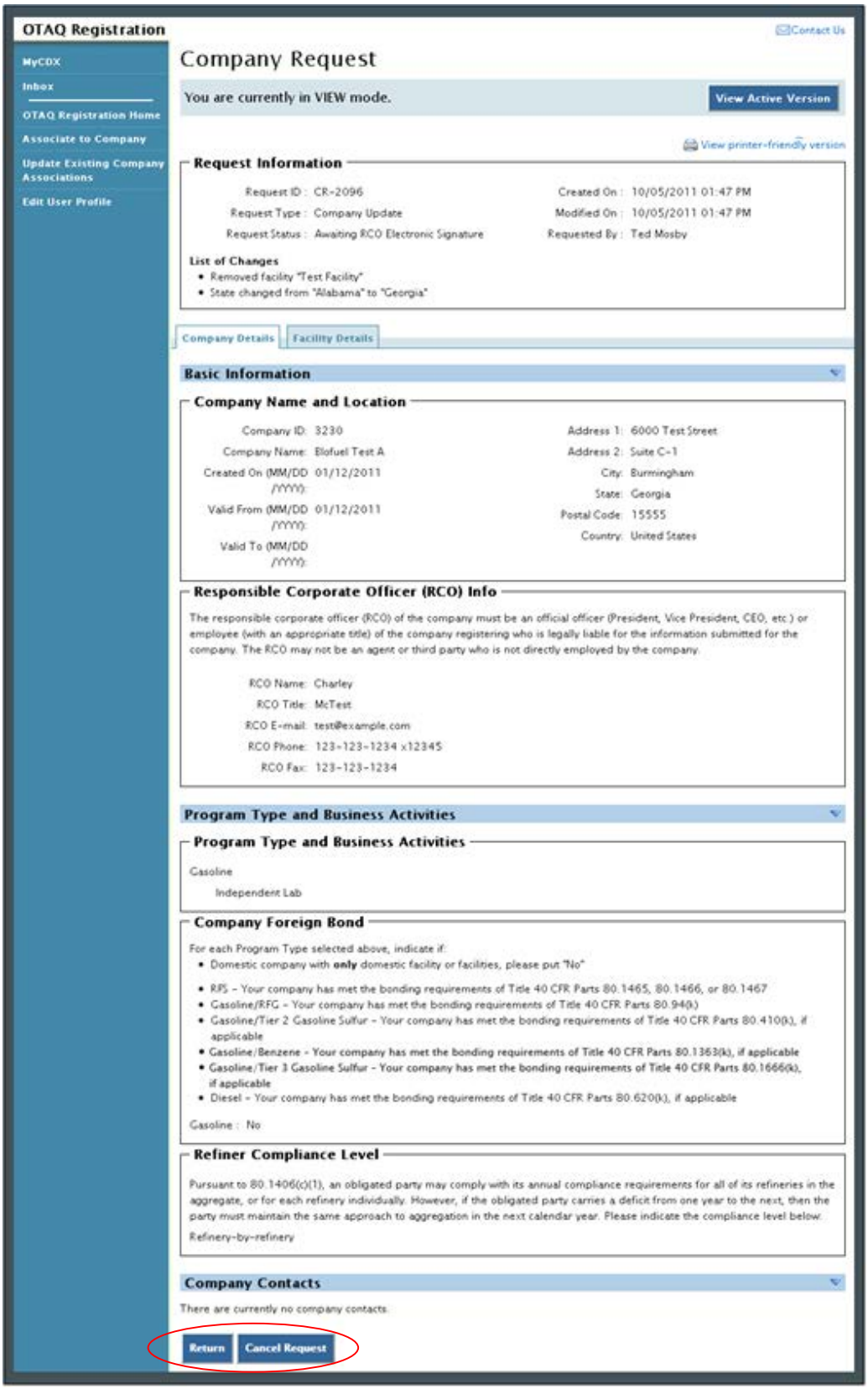
## 7.3 Pending Company Update Request

Congratulations! You have successfully submitted your Company Update Request in the OTAQReg application. As shown in Figure 7-8, your request will be displayed in your Pending Requests queue on your OTAQ Registration Home Page along with its current status.

**Figure 7-8 Updated Company Pending Request**

To view a pending Company Update Request, click the Company Name link in the Pending Requests Queue for a request identified with the Company Update icon . Figure 7-9 will display.

**Figure 7-9 Company Update Request**



The Company Update Request page displays the current company information as well as a list of changes made by the request. To view the active version of the company record, click the “View Active Version” button. To return to the OTAQReg Home Page, click the “Return” button.

To cancel the Company Update Request, click the “Cancel Request” button. A notification window will appear, prompting you to select the “Yes” button to continue with the request cancellation or the “No” button to return to the previous page. The request will be canceled immediately and will no longer display in the Pending Requests queue.

## 7.4 Edit Facility Details

To edit Facility Details for a company, click the Facility Details tab, shown in Figure 7-10, while in EDIT mode. Figure 7-11 will display.

## Figure 7-10 Facility Details Tab

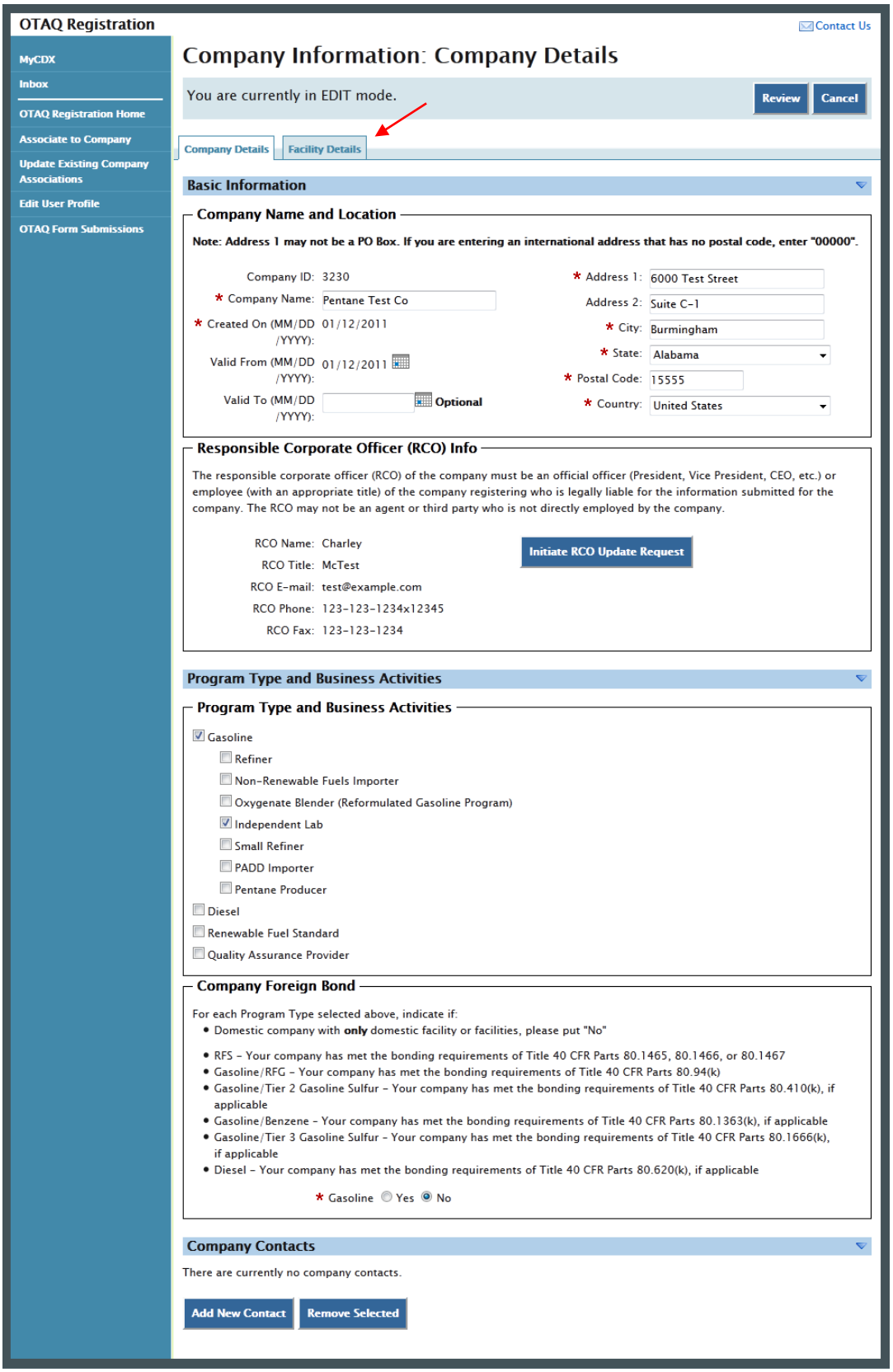
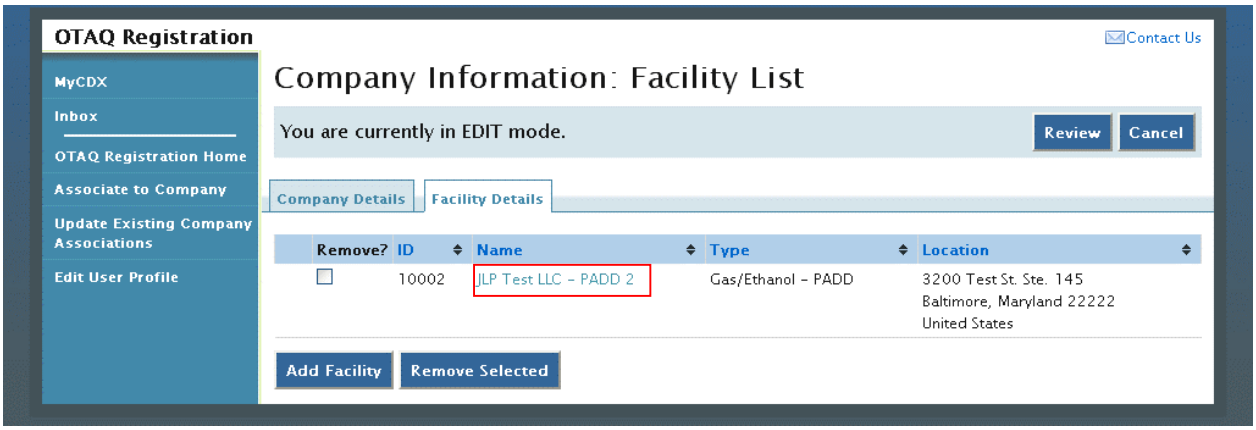
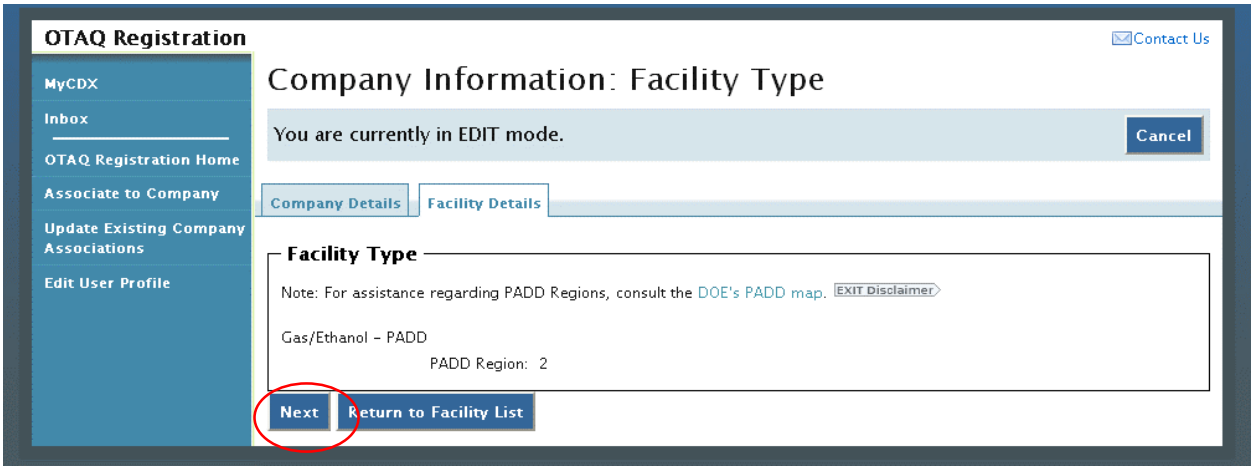


**Figure 7-11 Company Information: Facility List**



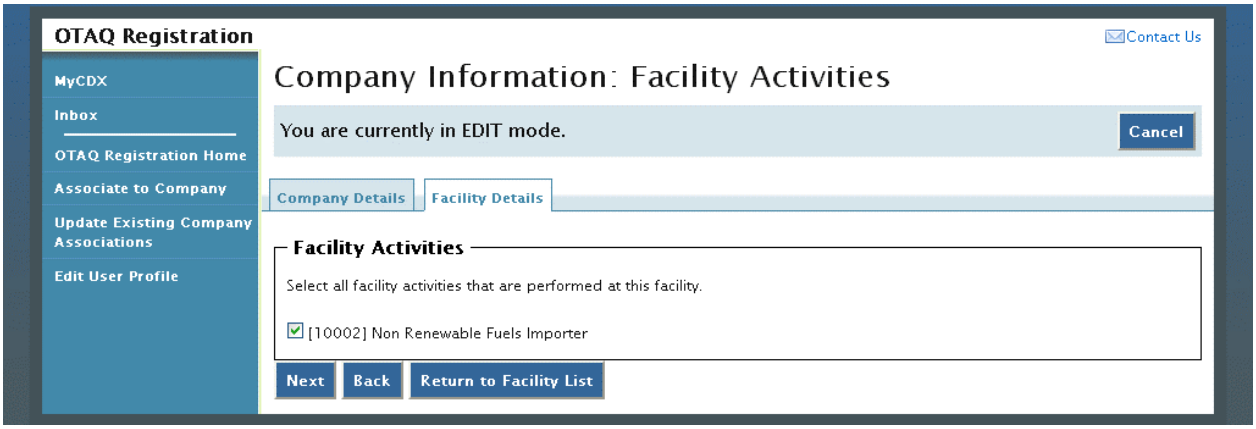

Click the facility na lay.

- **ormation: Facility Type**



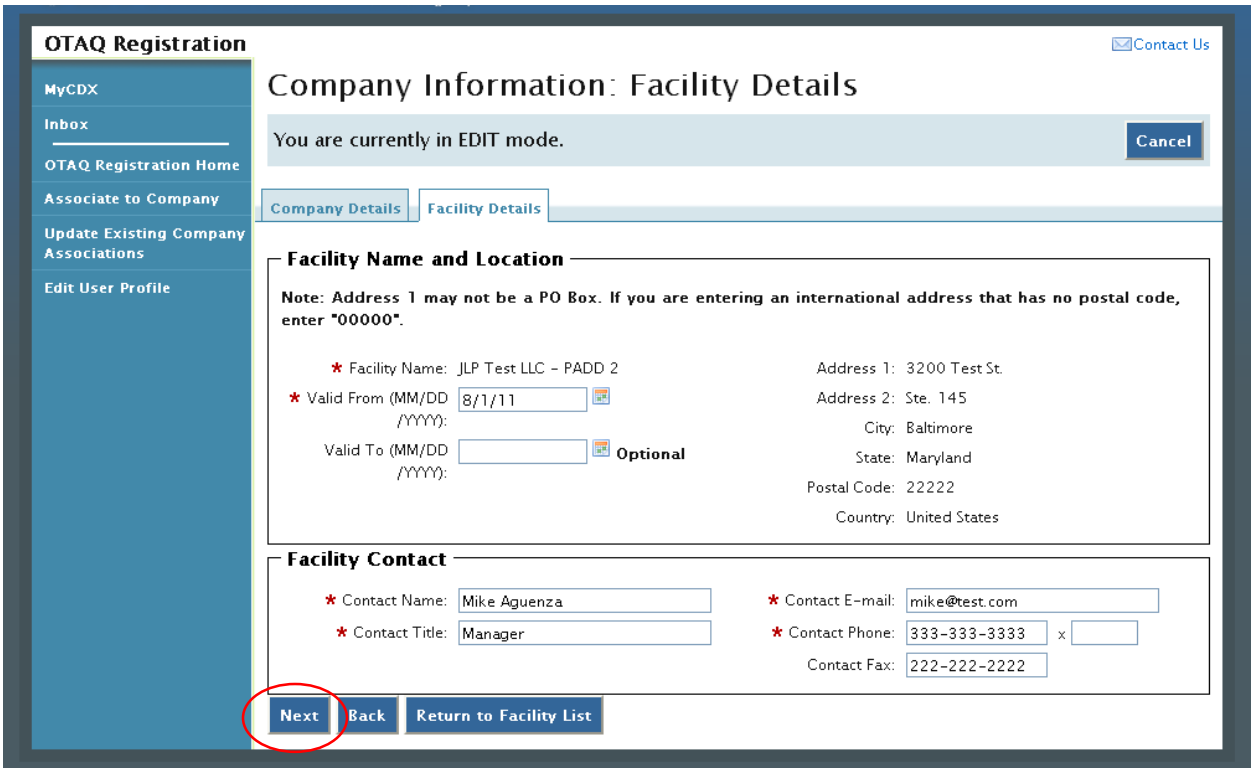

The Facility Type p ent facility type. This information is not editable for any exis t" button. Figure 7-13 will display.

- **mation: Facility Activities**



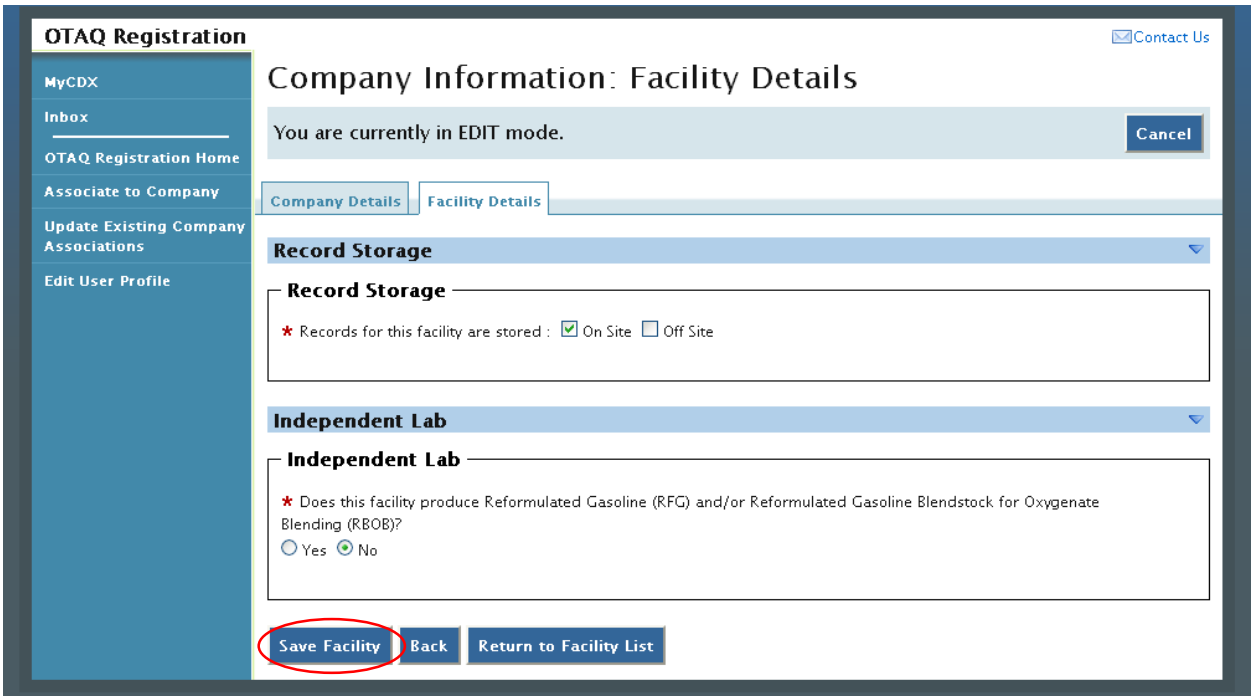
The Facility Activities page displays all possible facility activities. Select the appropriate facility activities and click the “Next” button. Figure 7-14 will display.

**Figure 7-14 Company Information: Basic Facility Details**



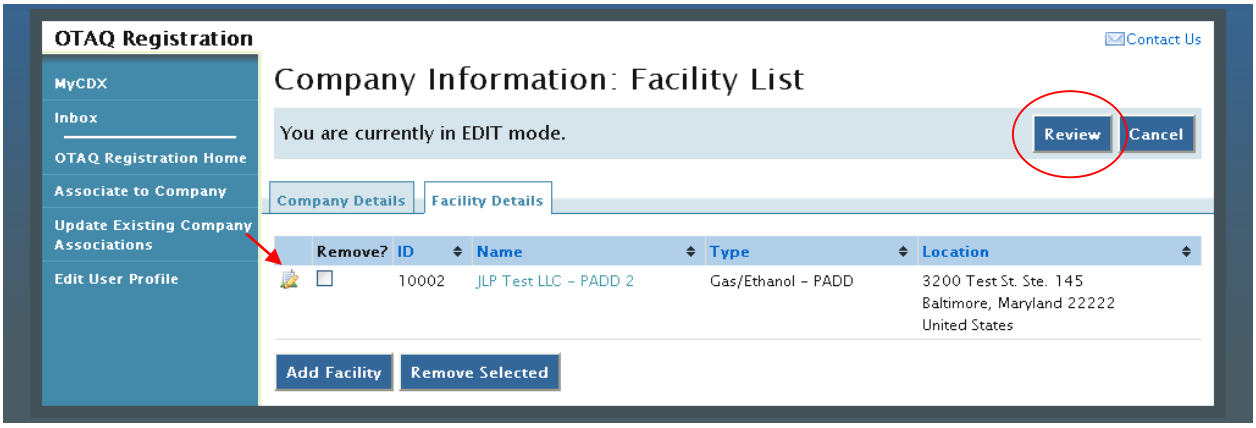

The Basic Facility Details page is pre-populated with the current facility detail information. Update the information by typing in the textboxes. When finished click the “Next” button. Figure 7-15 will display.

**Figure 7-15 Company Information: Facility Details**




The Facility Details page is pre-populated with the current facility information. Make any required updates to the facility specific information and click the "Save Facility" button to apply the changes. Figure 7-16 will display.

**Figure 7-16 Facility List: Updated Facility**

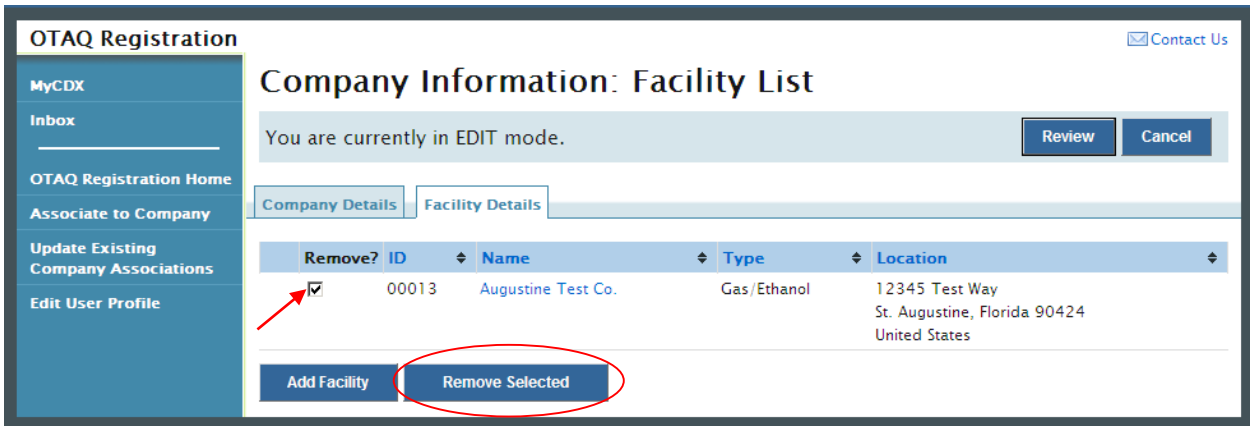



The facility will display with the updated icon . Click the "Review" button and follow the steps in Section 7.2 to complete your Company Update submission.

## 7.5 Remove Facility

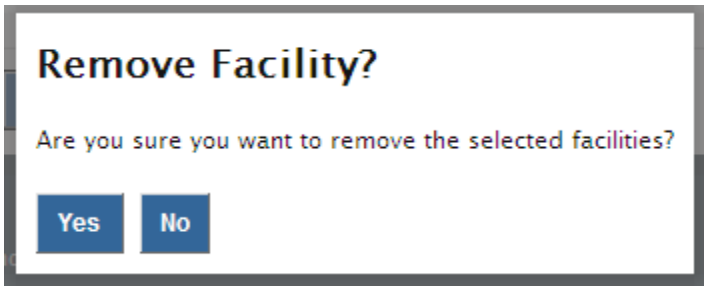
To remove a Facility from a company, click the Facility Details tab, as seen in Figure 7-3, while in EDIT mode. Figure 7-17 will display.

**Figure 7-17 Company Information: Facility List**



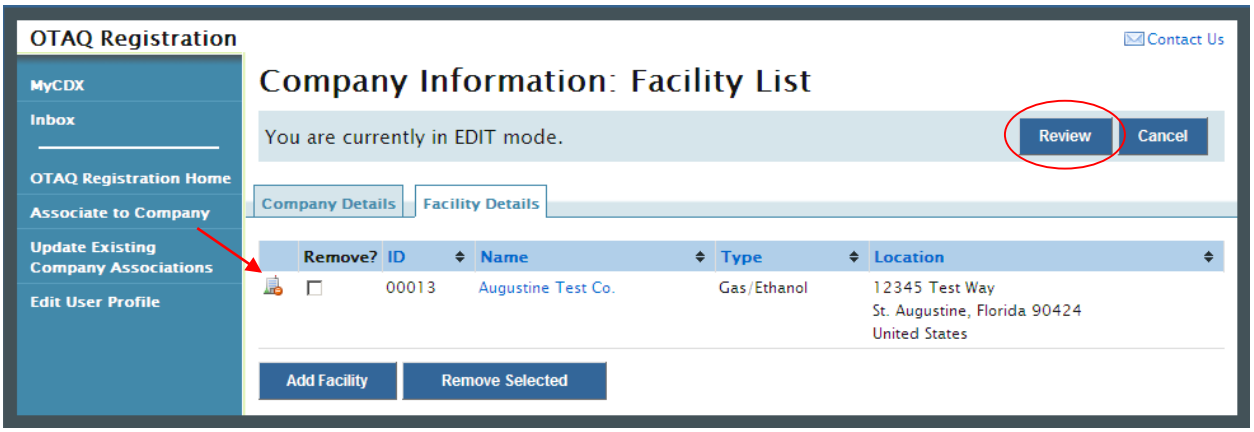

Select the checkbox for the corresponding facility and click the "Remove Selected" button. Figure 7-18 will display.

**Figure 7-18 Remove Facility Confirmation**




Click the "Yes" button to remove the facility. Figure 7-19 will display.

**Figure 7-19 Facility List: Removed Facility**




The facility will display with the removed icon. Click the "review" button and follow the steps in Section 7.2 to complete your Company Update submission.

## 7.6 Initiate RCO Update Request

To update the RCO information for your company, click the “Initiate RCO Update Request” button shown in while in EDIT mode, as shown in Figure 7-20. Figure 7-21 will display.

**Note:** Clicking the “Initiate RCO Update Request” button will initiate a RCO Update request which is processed separately from any company edits.

## Figure 7-20 Initiate RCO Update Request

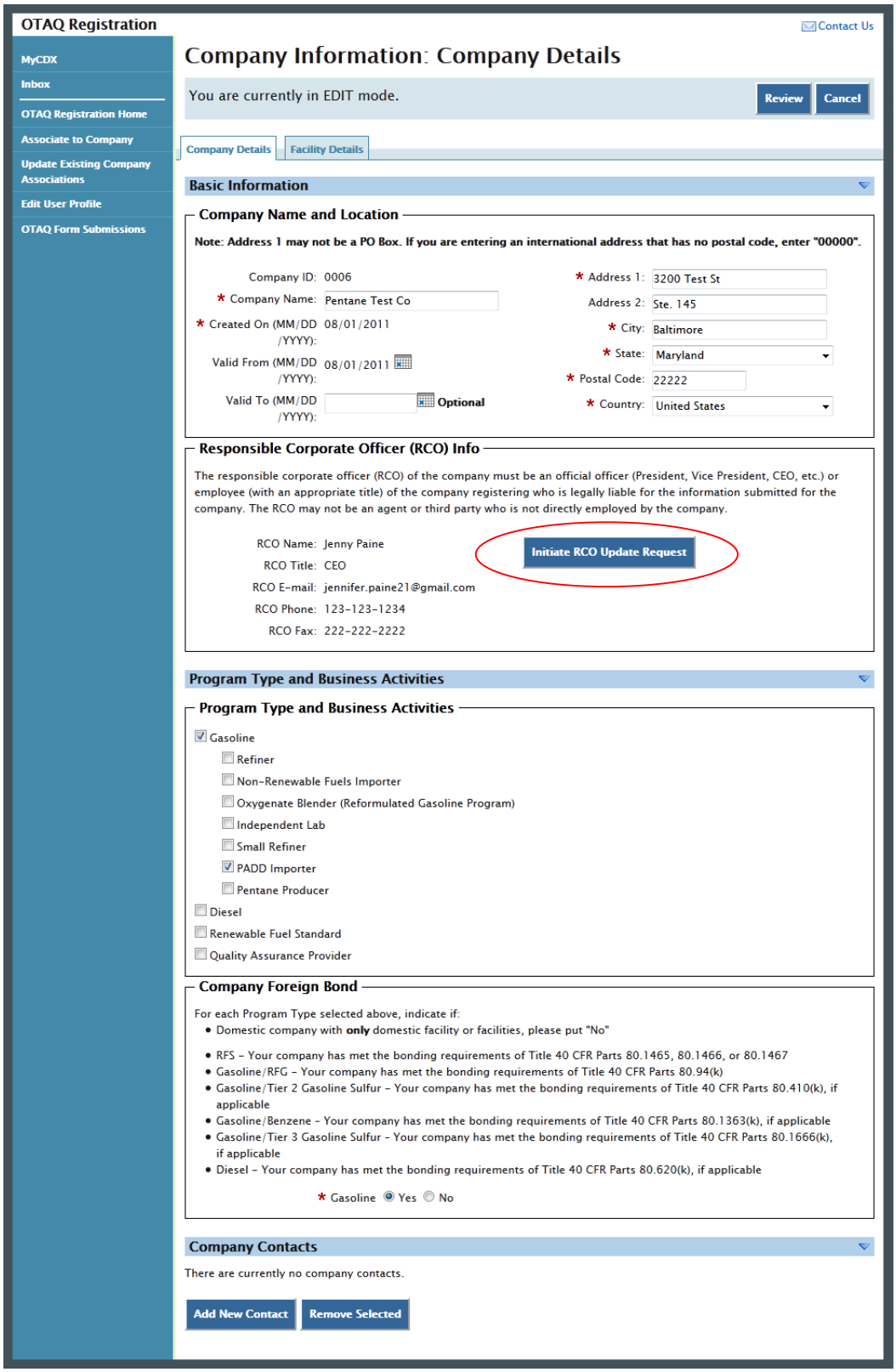
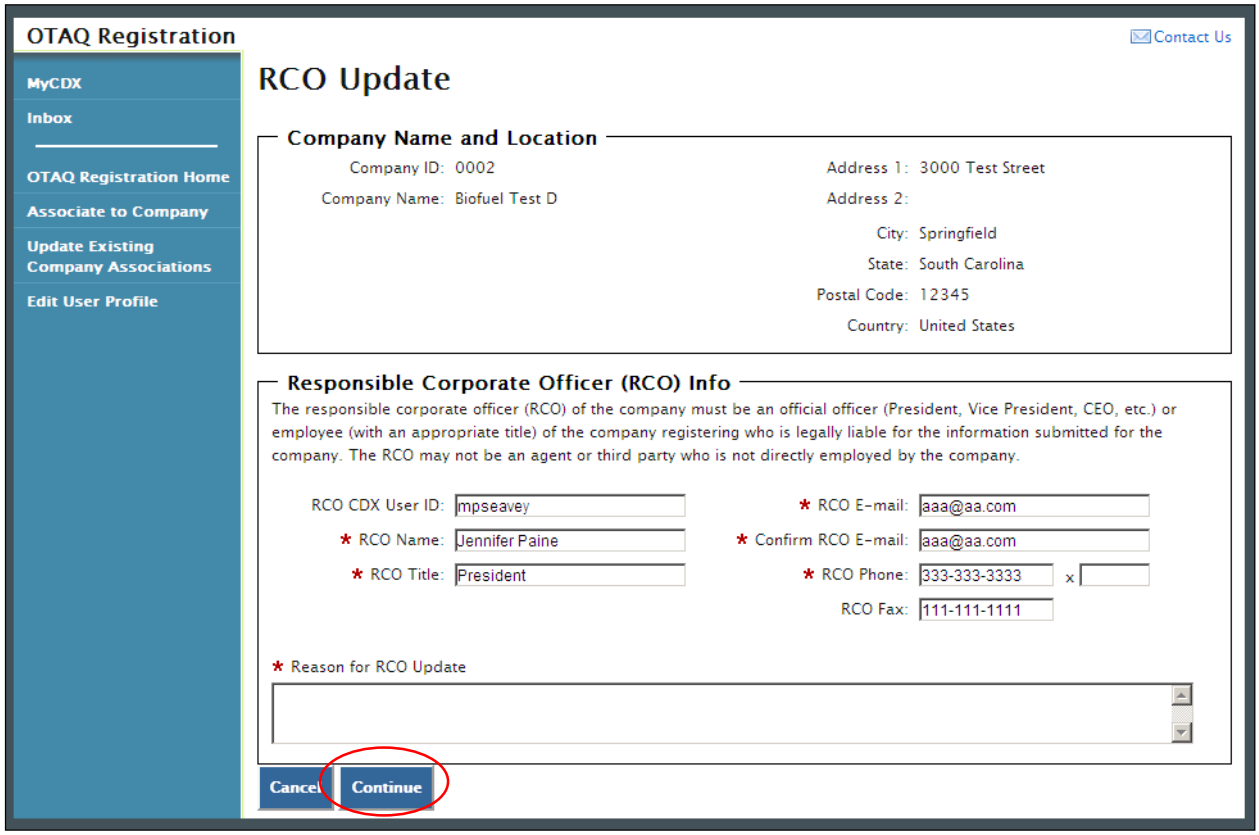


**Figure 7-21 RCO Update**

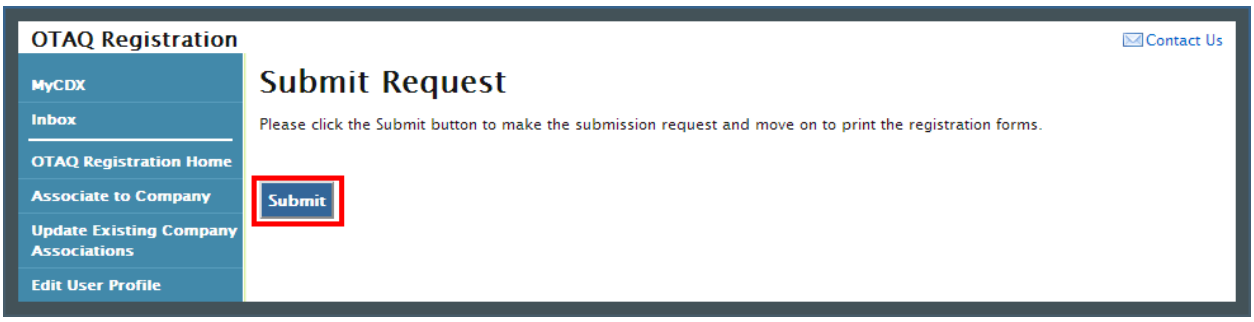



The RCO Update page is pre-populated with the current RCO information. Update the RCO information by typing in the displayed textboxes. Please note you must enter a reason for the RCO update. Once you have completed your RCO updates, click the “Continue” button. Figure 7-22 will display.

**Figure 7-22 Further Action Required Pop-up**

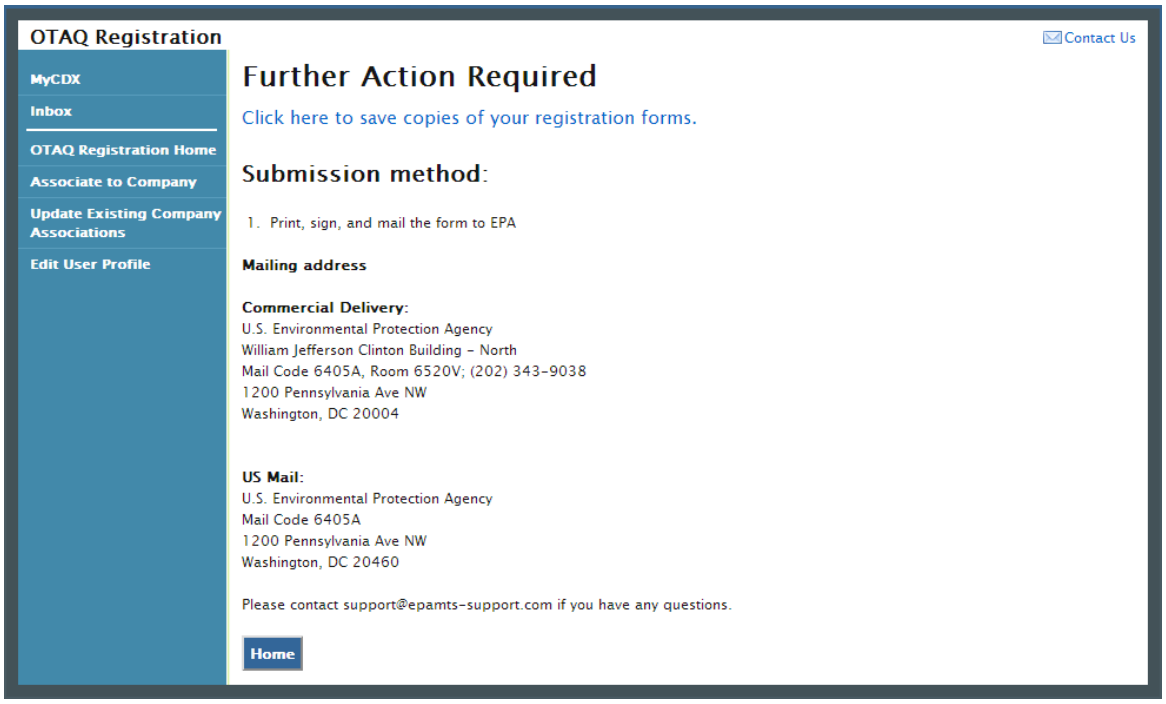
A pop-up window will display indicating that further action is required to complete this RCO update. Once you have reviewed the message, click the "OK" button. Figure 7-23 will display.

**Figure 7-23 Submit Request**




Click the "Submit" button. Figure 7-24 will display.

**Figure 7-24 Further Action Required Page**




Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms after submitting your request. If you attempt to select the "Home" button without first saving a copy of your registration forms, a notification window will appear prompting you to first save your forms.

An email will be sent to you, the current company RCO, and the new company RCO (if applicable) containing a hardcopy of the request and confirming your RCO update request. The request will also be listed in the pending requests section of your OTAQ Registration Home Page, as shown in Figure 7-25.

> **Note:** All RCO Updates must be hand-signed by the existing company RCO and the new company RCO (if the RCO is changing) and mailed to the Fuels Program. The signature letter is included in the hard copy of the request. RCO Update requests cannot be electronically signed.

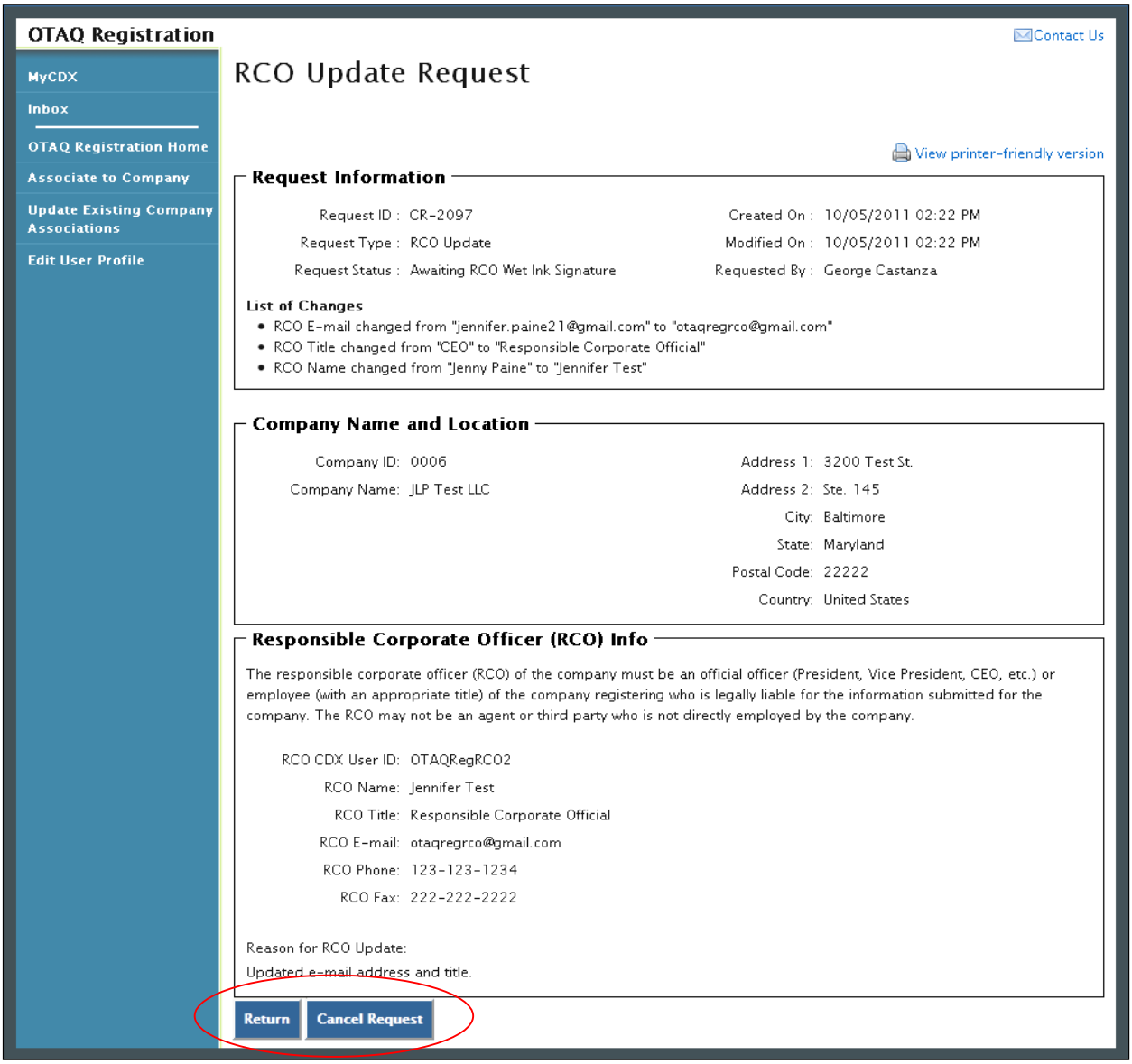
## 7.7 Pending RCO Update Request

Congratulations! You have successfully submitted your RCO Update Request in the OTAQReg application. As shown in Figure 7-25, your request will be displayed in your Pending Requests queue on your OTAQ Registration Home Page along with its current status.

**Figure 7-25 Pending RCO Update**

To view a pending RCO Update Request, click the Company Name link in the Pending Requests Queue for a request identified with the RCO update icon . Figure 7-26 will display.

**Figure 7-26 RCO Update Request**




The RCO Update Request page displays the current RCO information as well as a list of changes made by the request. To return to the OTAQReg Home Page click the “Return” button.

To cancel the RCO Update Request, click the “Cancel Request” button. A notification window will appear, prompting you to select the “Yes” button to continue with the request cancellation or the “No” button to return to the previous page. The request will be canceled immediately and will no longer display in the Pending Requests queue.

# 8 Appendix A: OTAQ Registration Roles

## 8.1 OTAQ Registration Roles

- Limited Company Viewer: This role has limited read-only access to associated company and facility information. Users with this role will not be able to see RCO information. These users will also be limited to only basic facility information on the Facility Details page.
- Company Viewer: This role has full read-only access to associated company and facility information.
- Company Editor: This role has full viewing and editing rights to associated company and facility information.

## 8.2 OTAQ Program Roles:

- Cellulosic Biofuel Waiver Credits (Pay.gov) Submitter: Users should select this role if they are registering for the Cellulosic Biofuel Waiver Credits Pay.gov application to purchase cellulosic biofuel waiver credits on behalf of the company (This role should only be selected if the company registered as a gasoline or diesel refiner or a non-renewable fuels importer).
- DC Fuels Submitter, Third Party Engineering Review: This role applies only if users are registering for the DC Fuels data flow and Title 40 CFR Part 80 Subpart M Independent Third Party Engineering Review. This will be automatically selected when “Independent Third Party Engineer” is chosen.
- DC Fuels Submitter, RFS Pathway Petitions (40 CFR 80.1416): Users should select this role if they are registering for the DC Fuels data flow to submit RFS Pathway Petitions as described in Part 80.1416.
- DC Fuels Submitter, Title 40 CFR Part 79 Subparts A,B,C,D, and F: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 79 Regulation of Fuels and Fuel Additives.
- DC Fuels Submitter, Title 40 CFR Part 80 Subparts D, E, F, H, J, and L: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 80 Reformulated Gasoline / Anti-Dumping / Gasoline Toxics / Gasoline Sulfur / Gasoline Benzene.
- DC Fuels Submitter, Title 40 CFR Part 80 Subpart I: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 80 Motor Vehicle, Nonroad, Locomotive, and Marine Diesel Fuel.
- DC Fuels Submitter, Title 40 CFR Part 80 Subparts K and M: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 80 Renewable Fuel Standard.
- DC Fuels Submitter, Title 40 CFR Part 80 Subpart O: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 80 Gasoline Sulfur (Tier 3).
- EMTS Fuels ABT Viewer: Users should select this role if they are requesting view-only access for all Gasoline Sulfur and Benzene Averaging, Banking, and Trading (ABT) transactions under the Tier 3 Gasoline Sulfur Program within the EMTS data flow.

- EMTS Fuels ABT Submitter: Users should select this role if they are requesting both editing and submitting rights for all Gasoline Sulfur and Benzene Averaging, Banking, and Trading (ABT) transactions under the Tier 3 Gasoline Sulfur Program within the EMTS data flow.
- EMTS RFS Viewer: Users should select this role if they are requesting view-only access for all RIN transactions under the RFS Program within the EMTS data flow.
- EMTS RFS Submitter: Users should select this role if they are requesting both editing and submitting rights for all RIN transactions under the RFS Program within the EMTS data flow.
- Agent: Users should select this role if they are an agent for a company (The definition of an agent is a person who is not a direct employee of the company).
- Independent Third Party Engineer: Users should select this role if they are an independent third party engineer. Selecting this role will automatically de-select all other OTAQReg Program roles, and add the DC Fuel Submitter, Third Party Engineering Review and OTAQ Registration Company Viewer roles. All other roles will be disabled.

# 9 Appendix B: Using the e-Signature Widget

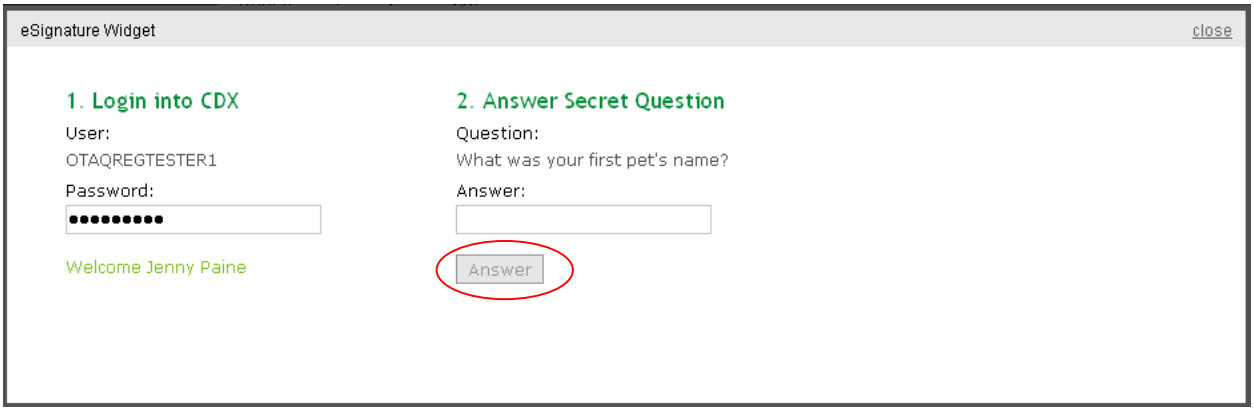
Users should refer to the steps outlined in this section to successfully sign their Electronic Signature Agreement. For information regarding signing change requests in the OTAQReg application, please see the Responsible Corporate Officer (RCO) User Guide.
Figure 9-1 will display.

**Figure 9-1 Authentication**

This page requires you to verify your CDX identity. The page displays your CDX User ID and a field to provide your CDX password. If you enter an incorrect password, you will be prompted with an error message. After three failed attempts, your CDX account will be locked. To unlock your account, contact the CDX Help Desk at 888-890-1995 or helpdesk@epacdx.net.

Enter your CDX user account password and click the "Login" button. Figure 9-2 will display.

**Figure 9-2 Answer Secret Question**

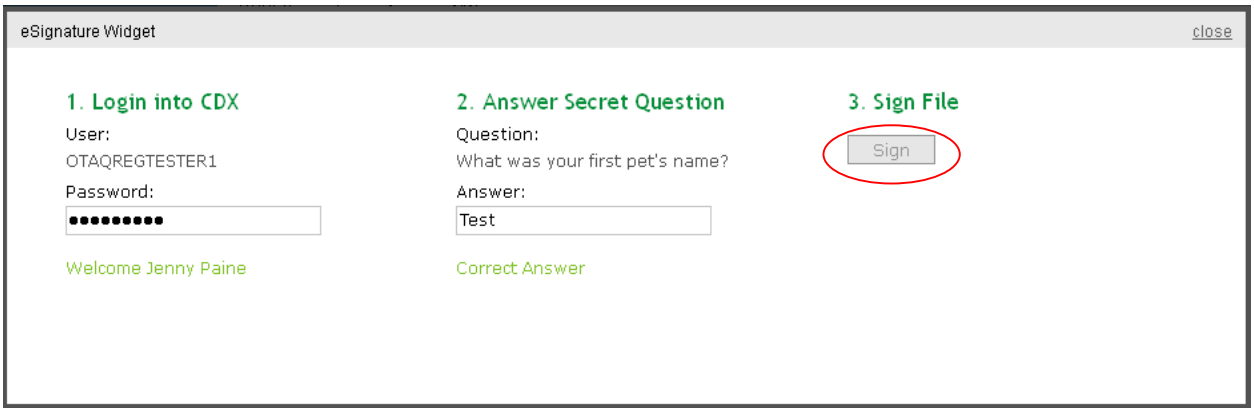



The next step is to provide the answer to your secret question. The page will display one of the five secret questions you chose during your e-Signature PIN verification.

If you fail to respond, or enter an incorrect answer, you will be prompted with an error message. Please note that the secret question will not change should you answer incorrectly. After three failed attempts, your CDX account will be locked. To unlock your account, contact the CDX Help Desk at 888-890-1995 or helpdesk@epacdx.net.

Enter the answer you provided during your e-Signature PIN verification and click the “Answer” button. Figure 9-3 will display.

**Figure 9-3 Sign File**



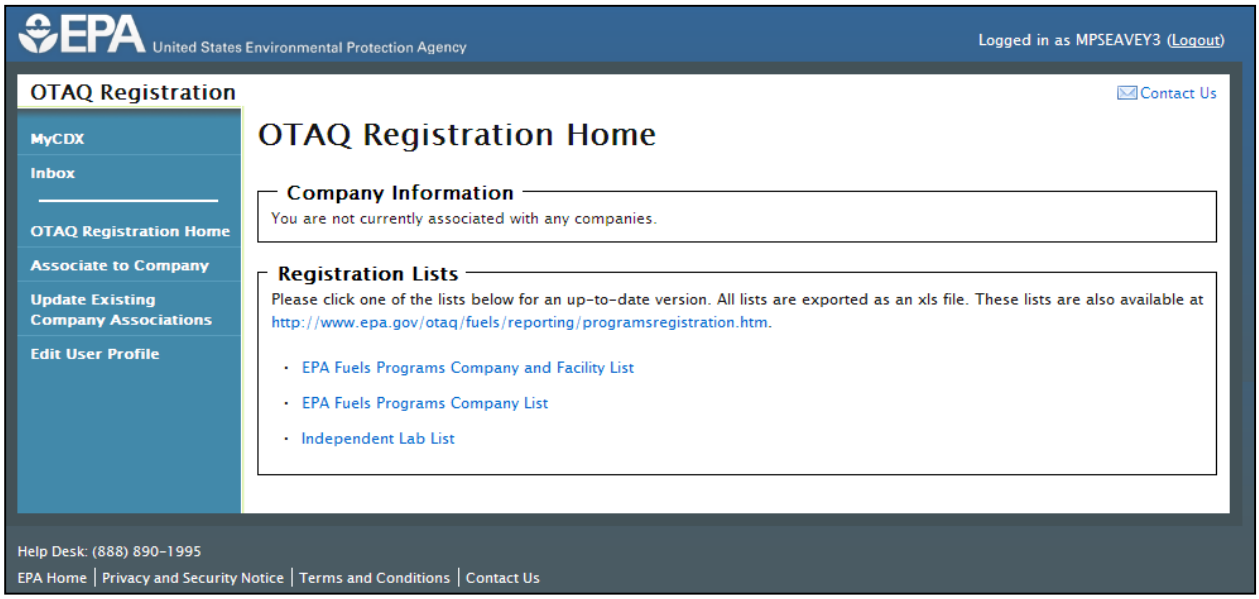

Click the “Sign” button.

Congratulations! You have successfully electronically signed and submitted your Electronic Signature Agreement.

# 10 Appendix C: OTAQ Registration Lists

Users can view and download the OTAQ Registration Lists by clicking any of the hyperlinks provided in the Registration Lists section of their OTAQ Registration Home Page as shown in Figure 10-1. This list is updated daily.

**Figure 10-1 Registration Lists**



# 11 Appendix D: Support Information

For frequently asked questions about the content, formats, or policies for the Office of Transportation and Air Quality (OTAQ) please reference the Fuels Program website at http://www.epa.gov/otaq/fuels/index.htm.

For any general or technical questions related to the Central Data Exchange you may contact any of the following:

- Telephone - Person-to-person telephone support is available from the CDX Help Desk 8:00 am to 6:00 pm EST. Call our toll-free line at 888-890-1995.
- Email - Send e-mail to Technical Support at helpdesk@epacdx.net with “Technical Support” in the Subject line.

If you have any questions relating to fuels programs registration, reporting, or OTAQReg, please contact the EPA Fuels Programs and EMTS Support Line at support@epamts-support.com.