CDX Fuels Programs Registration User Guide for Responsible Corporate Officers

Version 3.02

United States Environmental Protection Agency

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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 Company Responsible Corporate Officer (RCO) for the OTAQ Fuels Program Registration (OTAQReg) online application. It describes the processes an RCO must follow to request RCO e-signature abilities including electronically submitting company requests and electronically managing user associations. These timesaving features eliminate the need to print and sign most requests and therefore avoids many mail delays in the registration process.

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

If you need assistance logging into CDX, please contact the CDX Help Desk at:

- 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.

1.1 Registration

Please refer to the OTAQ Registration User Guide for instructions on how to register for the OTAQ Fuels Program Registration (OTAQReg) online application. RCOs wishing to gain RCO e-signature abilities must have their own CDX User ID and complete an Electronic Signature Agreement (ESA).

1.2 Additional OTAQReg User Functions

Please refer to the OTAQ Registration User Guide for detailed instructions on how to utilize the remaining sidebar links:

- Associate to Company
- Update Existing Company Associations
- Edit User Profile

2 Requesting RCO e-signature abilities

The following sections describe the steps a user must take to become the Responsible Corporate Officer (RCO) user with the e-signature ability for a company in the OTAQReg application.

2.1 Initiate RCO Update Request

To receive the RCO e-signature ability within the OTAQReg application you must be identified as the company RCO on the company record. Any associated user with the Company Editor role may initiate an RCO Update Request to add the RCO's CDX User ID to the company's registered RCO information.

To initiate an RCO Update Request, click the Company Name link, as shown in Figure 2-1, for a company for which you have an active Company Editor role. Figure 2-2 will display.

Figure 2-1 OTAQ Registration Home Page

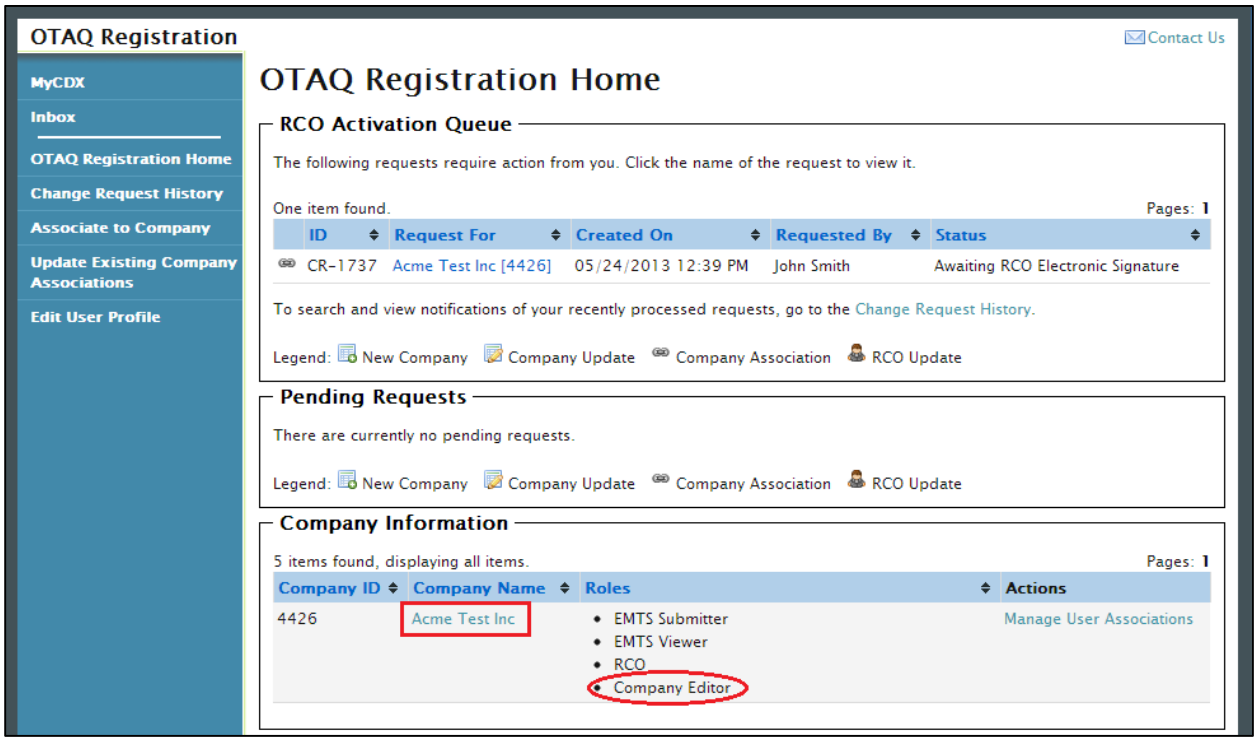
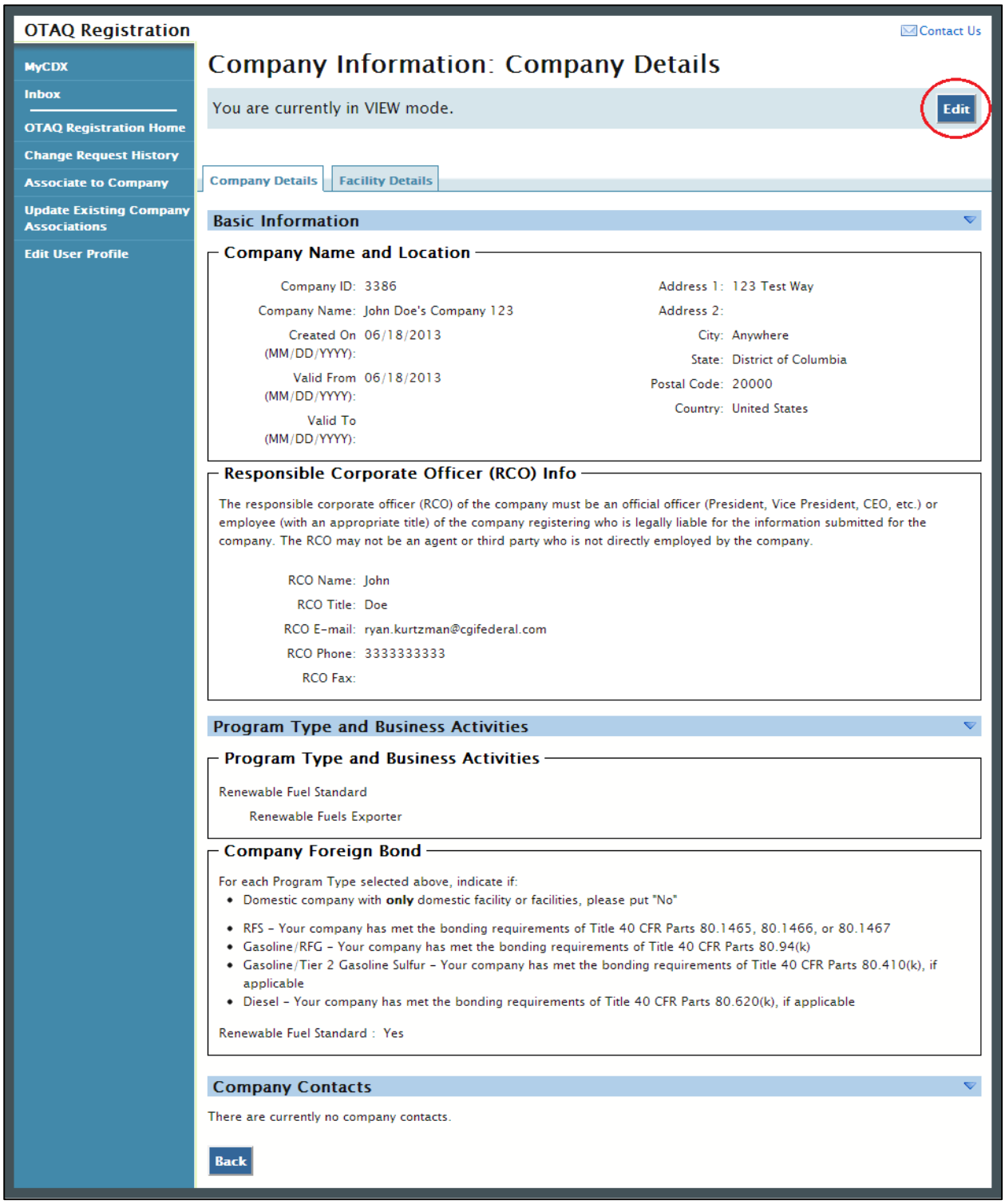
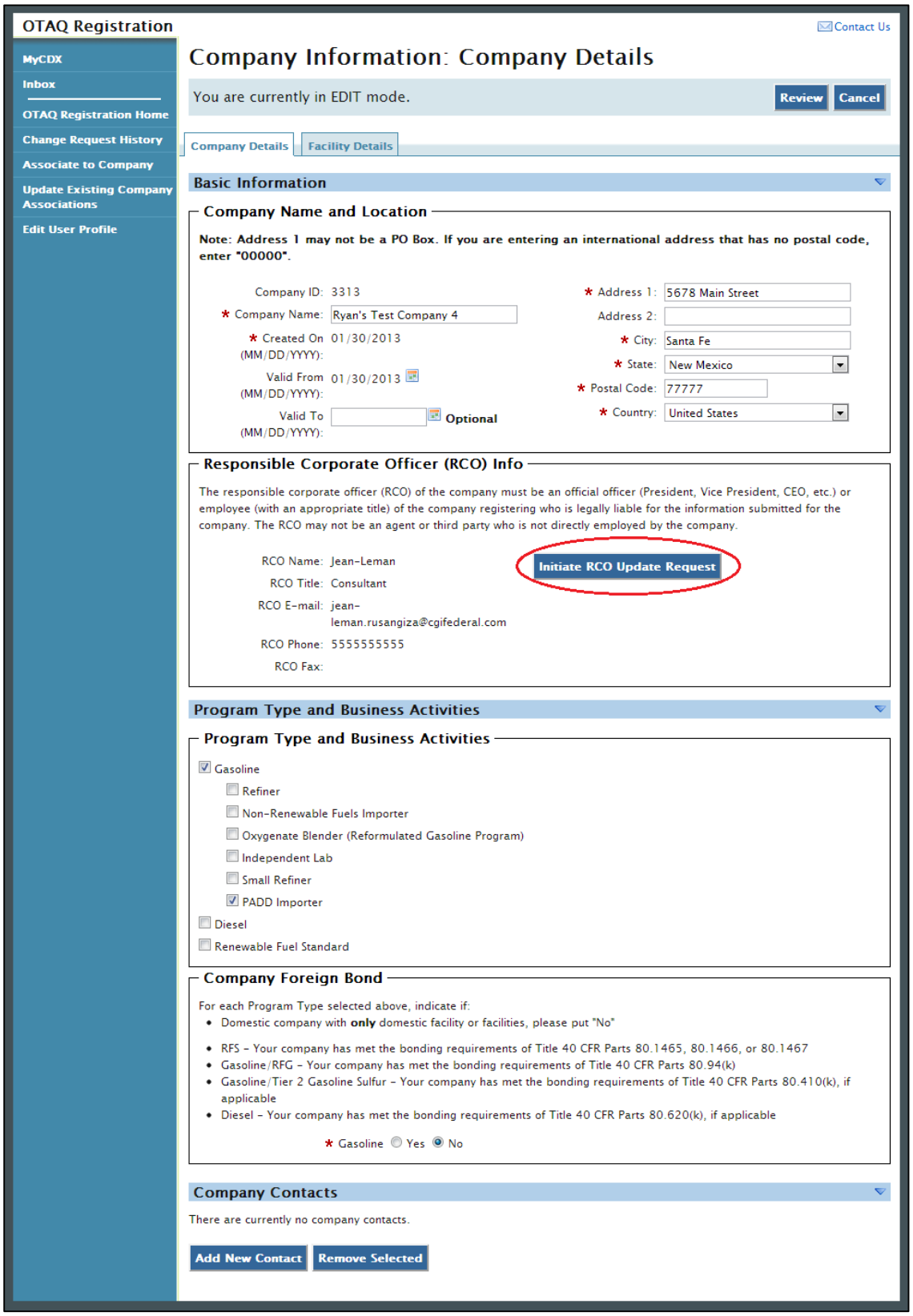


Figure 2-2 Company Information: Company Details



Click the "Edit" button in the top right side of the page. Figure 2-3 will display.

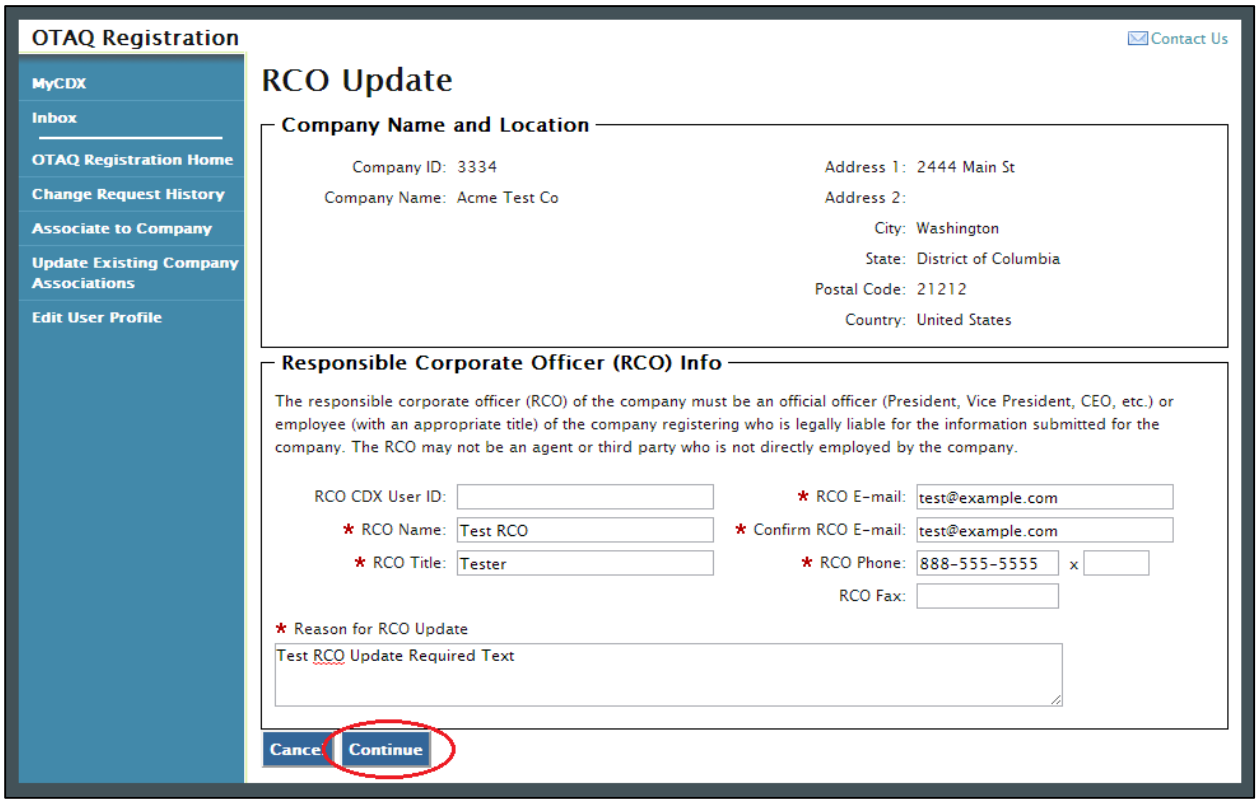
Figure 2-3 Edit Company Details Page



The page will now state, “You are currently in EDIT mode.” Click the “Initiate RCO Update Request” button. Figure 2-4 will display.

Note: Clicking the “Initiate RCO Update Request” button will initiate a RCO Update request which is processed separately from any company edits. RCO Update Requests may not be made simultaneously with Company Update Requests.

Figure 2-4 RCO Update



The RCO Update page is pre-populated with the current RCO information. Update the RCO information as needed.

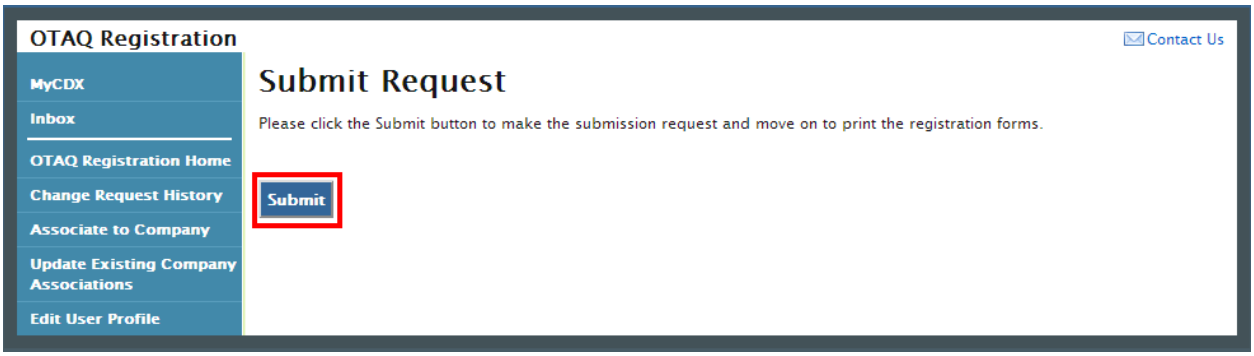
Note: In order to grant RCO e-signature abilities to the RCO, you <u>must</u> enter the CDX User ID for the designated RCO.

Once you have provided data for all required fields click the “Continue” button. Figure 2-5 will display.

Figure 2-5 Further Action Required Window

Click the "OK" button on the "Further Action Required" window. Figure 2-6 will display.

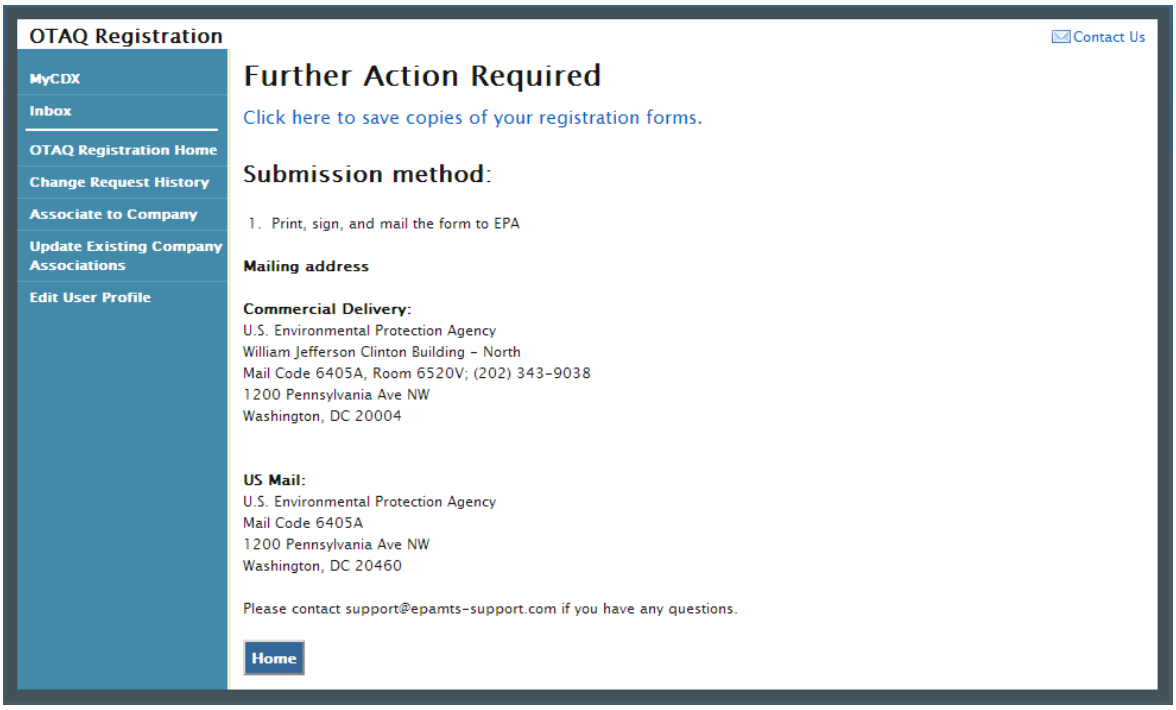
Figure 2-6 Submit Request



Click the "Submit" button to finalize your RCO update request. 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 2-8.

Figure 2-7 will display.

Figure 2-7 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.

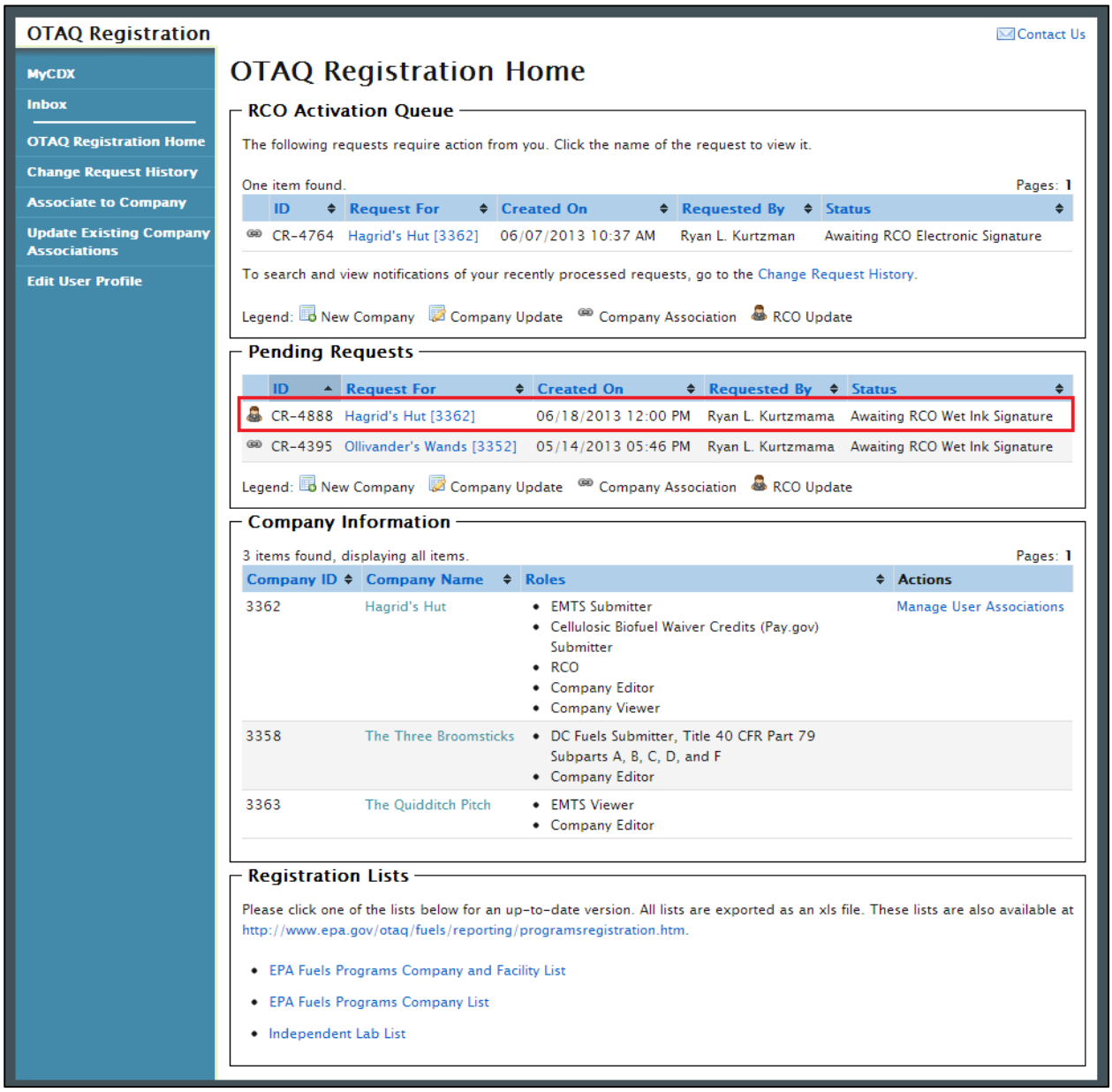
Note: All RCO Updates must be hand-signed by the existing company RCO and the new company RCO (if the RCO is changing) and mailed to the Fuels Program. The signature letter is included in the hard copy of the request. RCO Update requests cannot be electronically signed.

2.2 Pending RCO Update Request

As shown in Figure 2-8, your request will be displayed in your Pending Requests queue on your OTAQ Registration Home Page along with its current status.

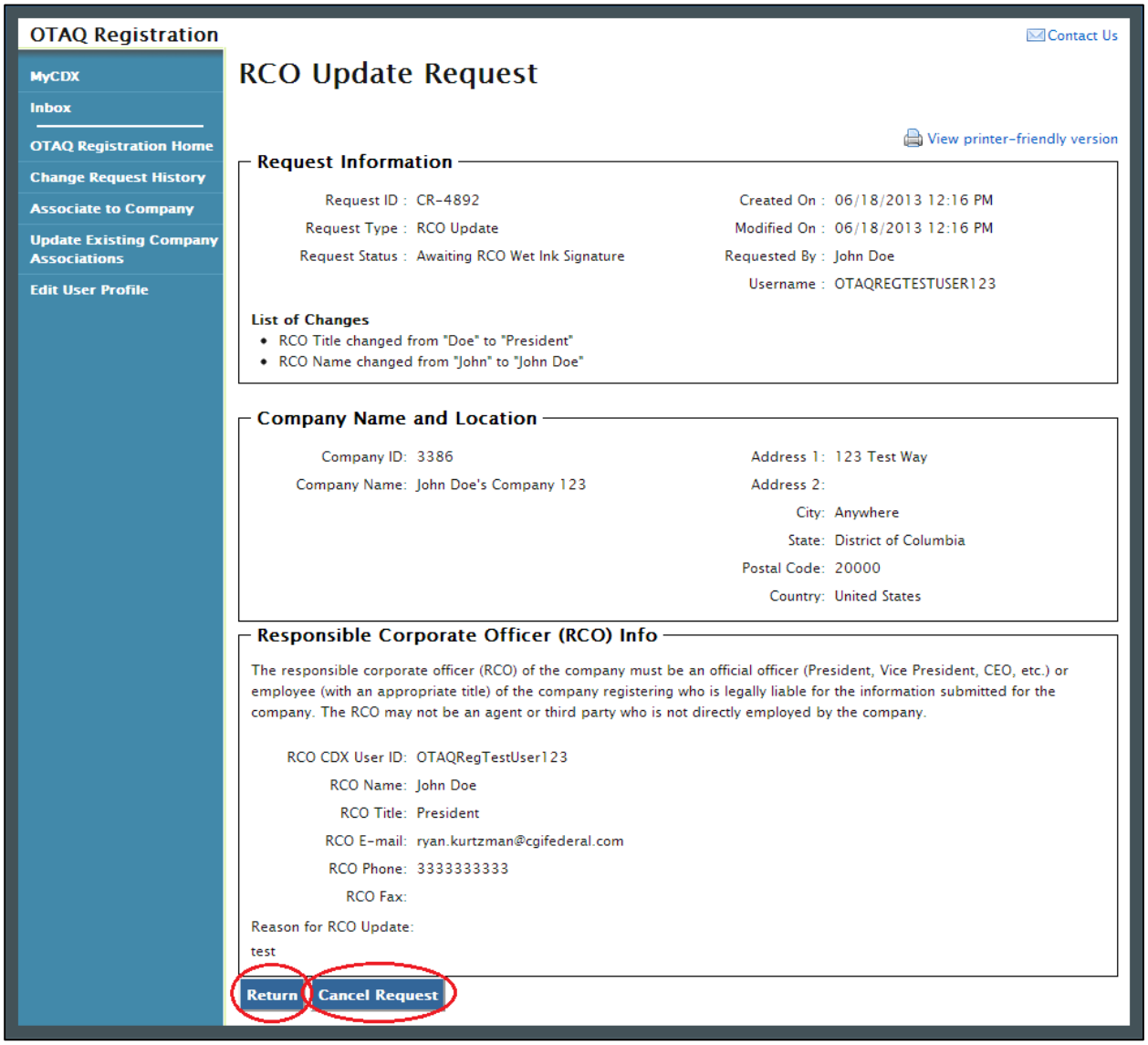
Note: The designated RCO will not receive RCO e-signature abilities until approved by the Fuels Program.

Figure 2-8 Pending RCO Update



To view a pending RCO Update Request, click the Company Name link in the Pending Requests Queue for a request with the RCO Update icon . Figure 2-9 will display.

Figure 2-9 Pending RCO Update Request



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

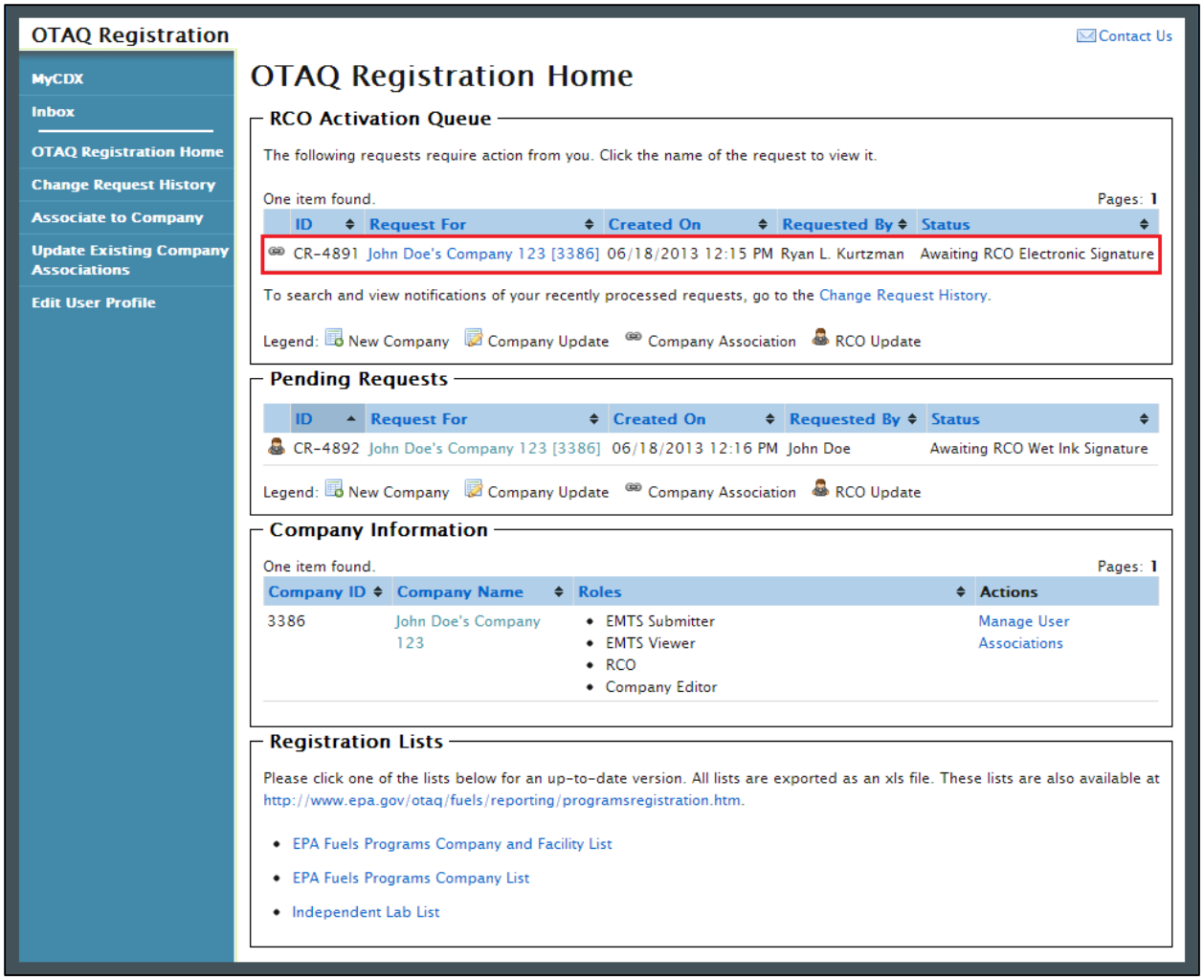
To cancel the RCO Update Request, click the “Cancel Request” button. A notification window will appear, prompting you to select the “Yes” button to continue with the request cancellation or the “No” button to return to the previous page. The request will be canceled immediately and will no longer display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

3 The RCO Activation Queue

As an acknowledged RCO for a company within the OTAQReg application, you will have the ability to electronically sign user requests for your company within the system as well as manage your company's users.

When an OTAQReg user submits a request to associate to your company or update your company's details it will appear in your RCO Activation Queue as shown in Figure 3-1. The following sections describe how to approve, reject, or edit these requests.

Figure 3-1 RCO OTAQ Registration Home Page



3.1 Company Association Requests

To act on a Company Association request, click the company name link for a request in the RCO Activation Queue with the company association icon . Figure 3-2 will display.

Figure 3-2 Company Association Request

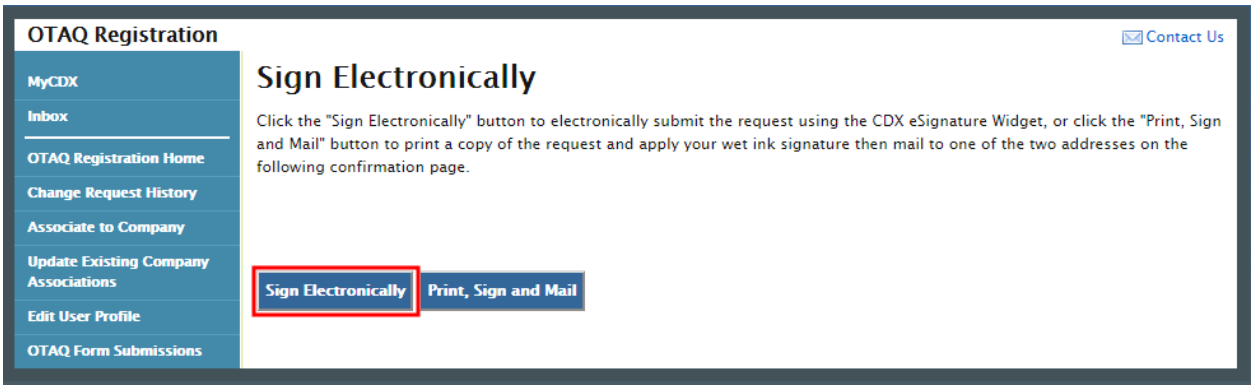
The Company Association Request page displays the request information, a list of changes, and various actions to perform on the request.

3.1.1 Approve Company Association Request

To approve a Company Association request, click the “Continue” button, as shown in Figure 3-3. Figure 3-4 will display.

Figure 3-3 Approve Company Association Request

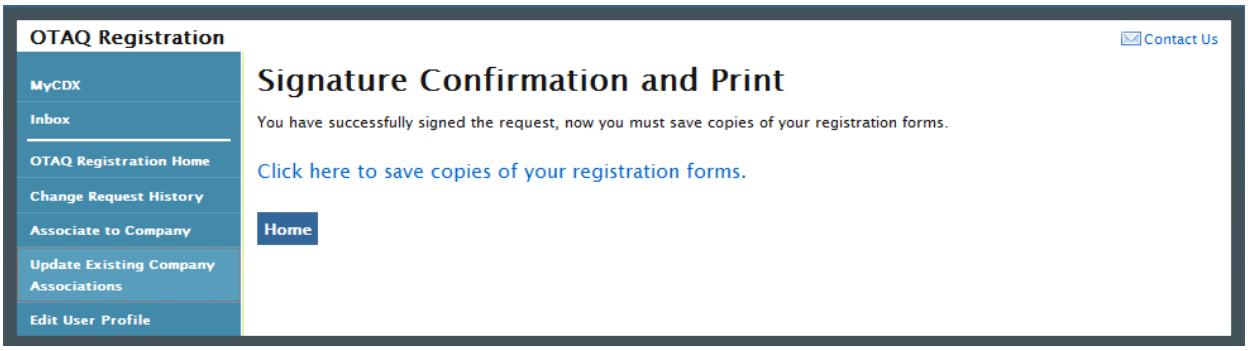
Figure 3-4 Sign Electronically Page



Click the "Sign Electronically" button to electronically sign the request. This will apply your signature to the request and automatically complete the company association. An email will be sent to you and the user who was modified through the Company Association request, containing a hardcopy of the request and confirming your request. Please reference Appendix A: Using the e-signature Widget for instructions on signing electronically. Figure 3-5 will display to confirm your completed association request.

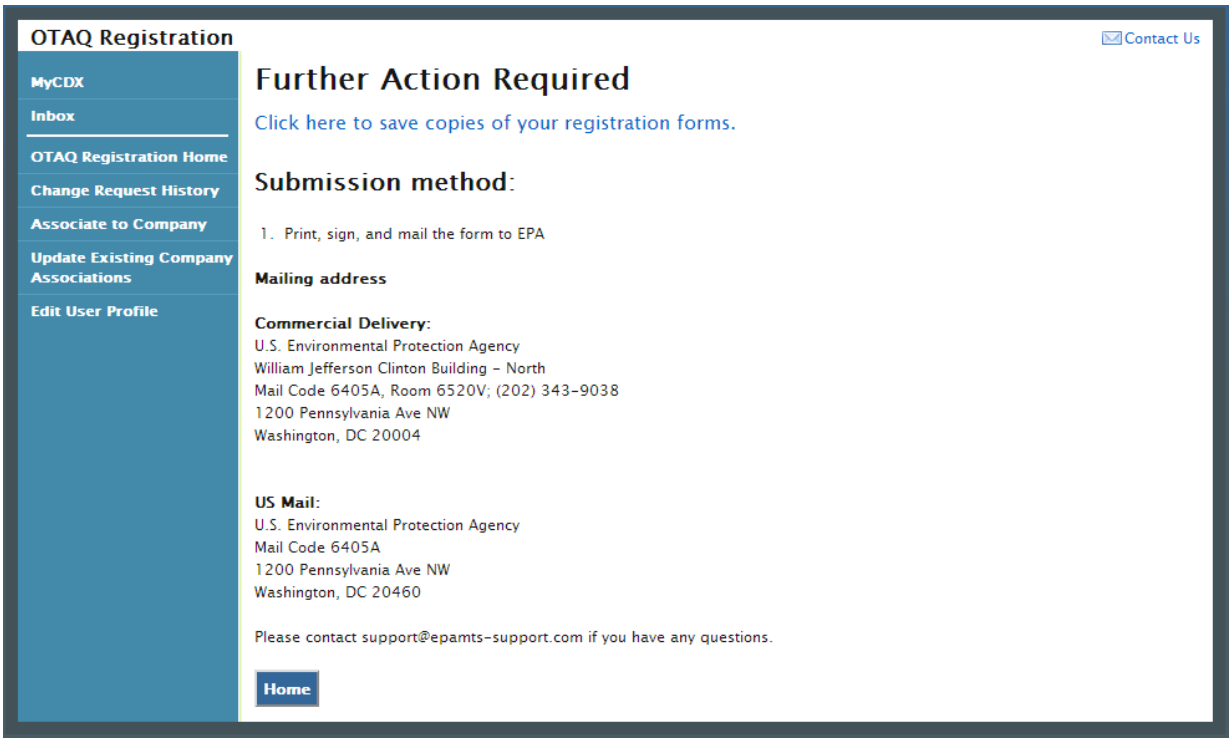
Note: The "Sign Electronically" button will only be displayed if the Fuels Program has received your CDX Electronic Signature Agreement. Otherwise, a "Submit" button will be displayed.

Figure 3-5 Signature Confirmation and Print



If you prefer to hand-sign the Company Association Letter, then click the "Print, Sign and Mail" button. Figure 3-6 will display. The request will also be listed in the Pending Requests section of your OTAQ Registration Home Page.

Figure 3-6 Further Action Required Page



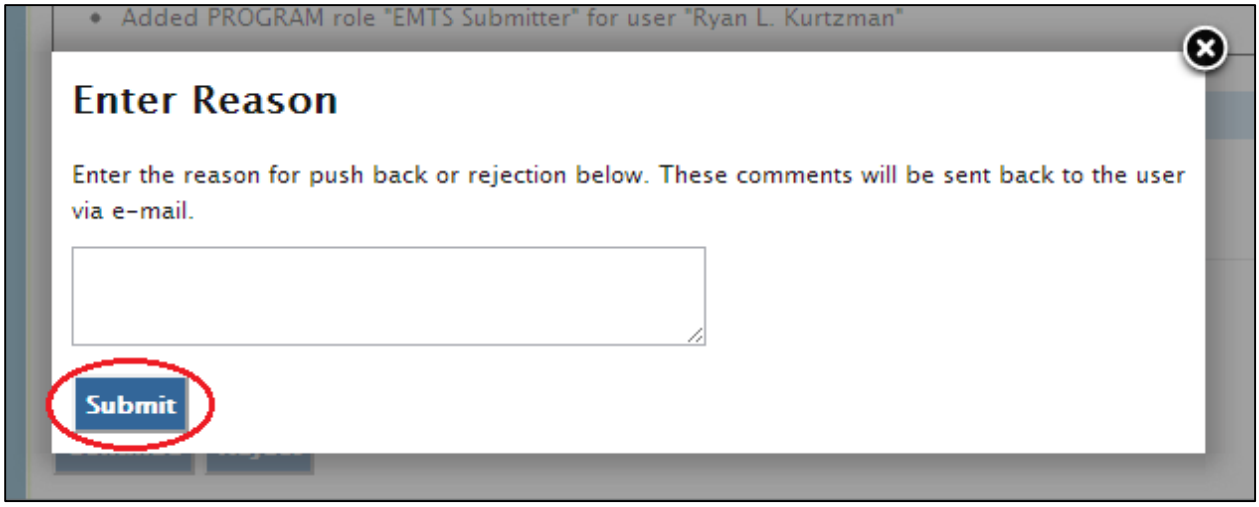
Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms after submitting your request. If you attempt to select the "Home" button without first saving a copy of your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

3.1.2 Reject Company Association Request

To reject a Company Association request, click the "Reject" button, as shown in Figure 3-7. Figure 3-8 will display.

Figure 3-7 Reject Company Association Request

Figure 3-8 Enter Reason Screen



Before finalizing the rejection of a Company Association request, you are required to provide an explanation for your rejection. Provide these details by typing in the textbox. Then click the "Submit" button. The requesting user will receive an e-mail notification stating that their Company Association request has been rejected for the provided reasons.

3.1.3 Edit Company Roles

As an RCO, you are able to edit a user's requested roles before activating their pending Company Association request.

Click the roles link on the Company Association request, as shown in Figure 3-9. Figure 3-10 will display.

Figure 3-9 Edit User Roles

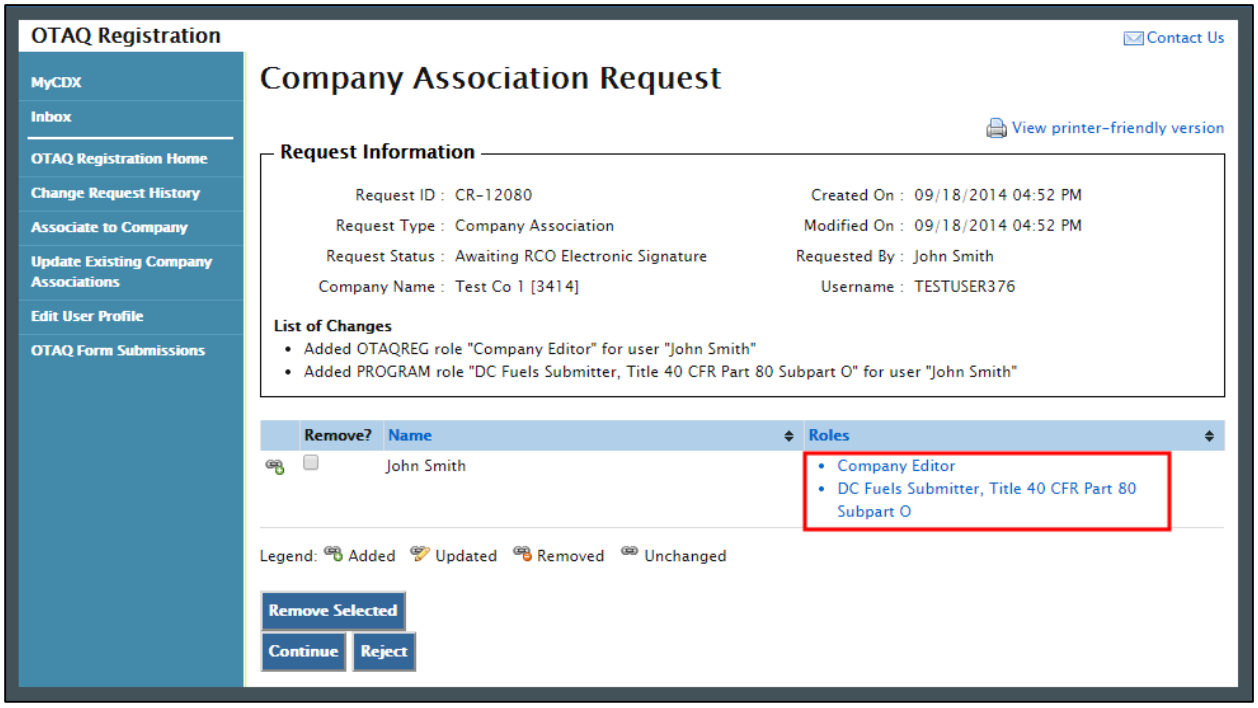
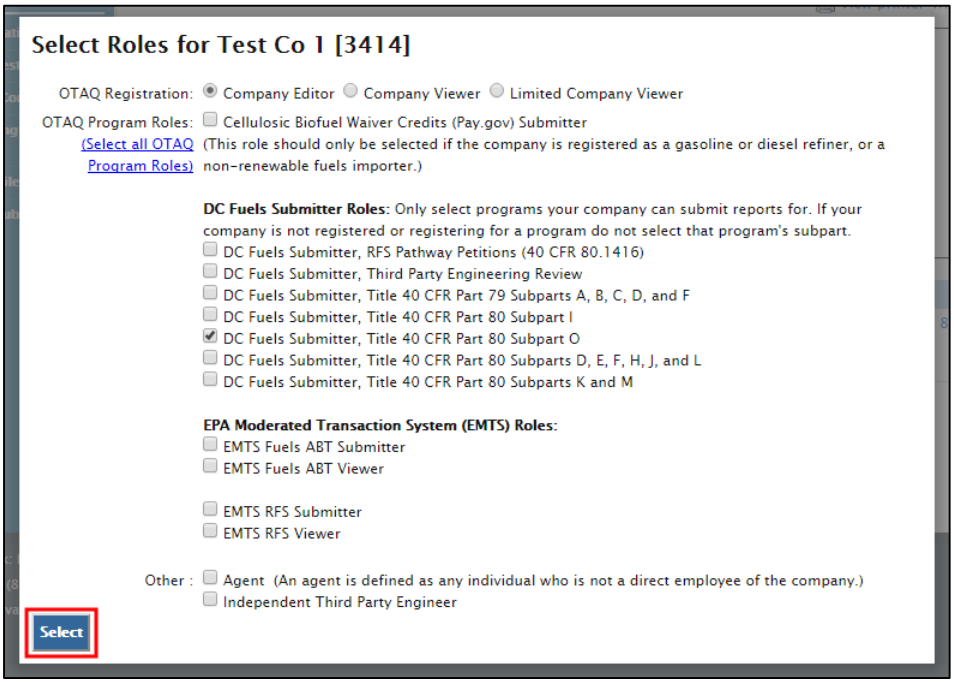


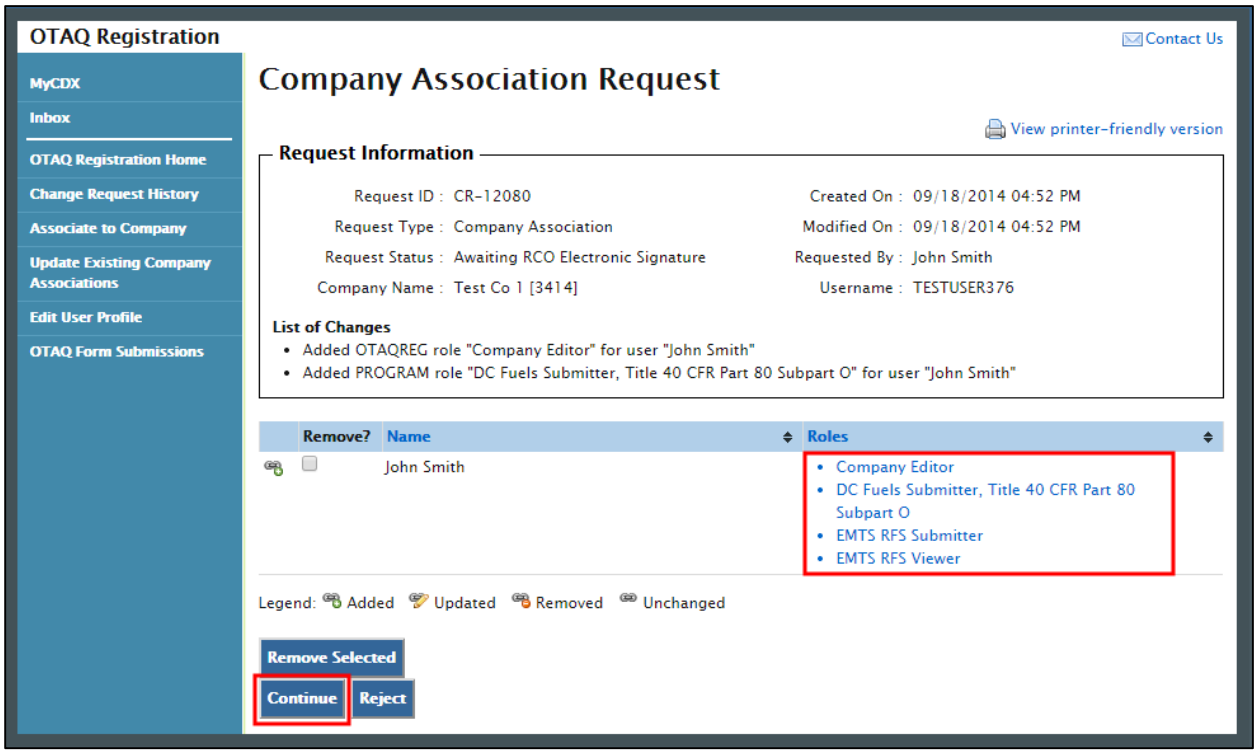
Figure 3-10 Select Roles



The Select Roles page displays the roles the user requested for the company. Edit the OTAQ Registration and Program roles by selecting the corresponding radio button and checkboxes. You

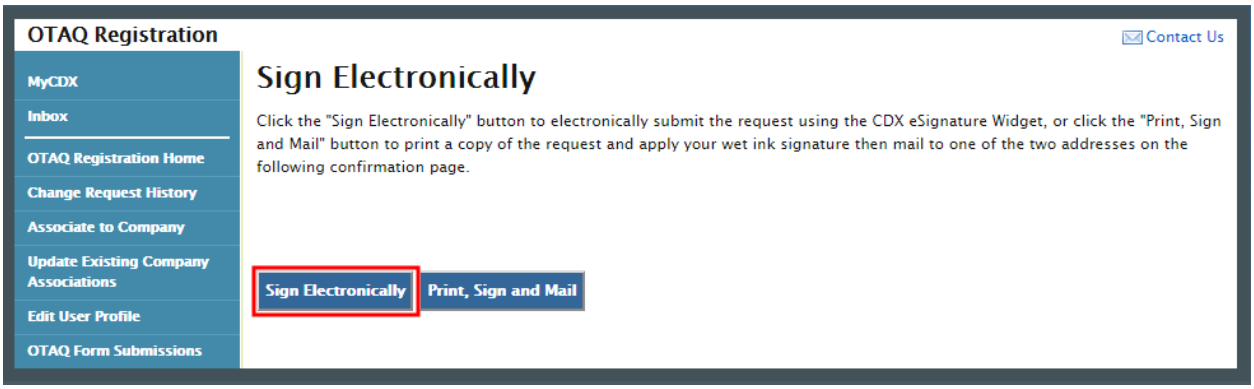
may select only one Registration role, however multiple OTAQ Program roles are allowed. Click the “Select” button once you have made your selections. Figure 3-11 will display.

Figure 3-11 Updated Company Association Request Page



The updated user roles are displayed on the Company Association Request page. If the updated information is correct, click the “Continue” button. Figure 3-12 will display.

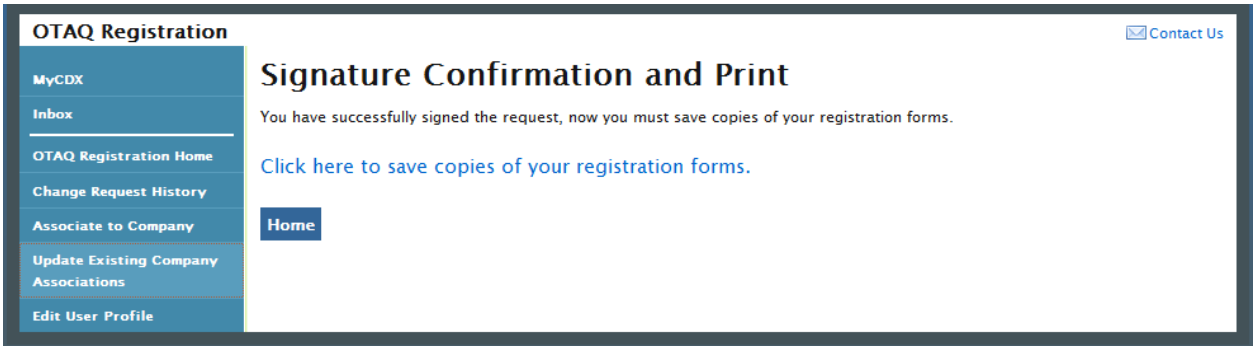
Figure 3-12 Sign Electronically Page



Click the “Sign Electronically” button to electronically sign the request. This will apply your signature to the request and automatically complete the company association. An email will be sent to you and the user who was modified through the Company Association request, containing a hardcopy of the request and confirming your request. Please reference Appendix A: Using the e-signature Widget for instructions on signing electronically. Figure 3-13 will display to confirm the completed Company Association request.

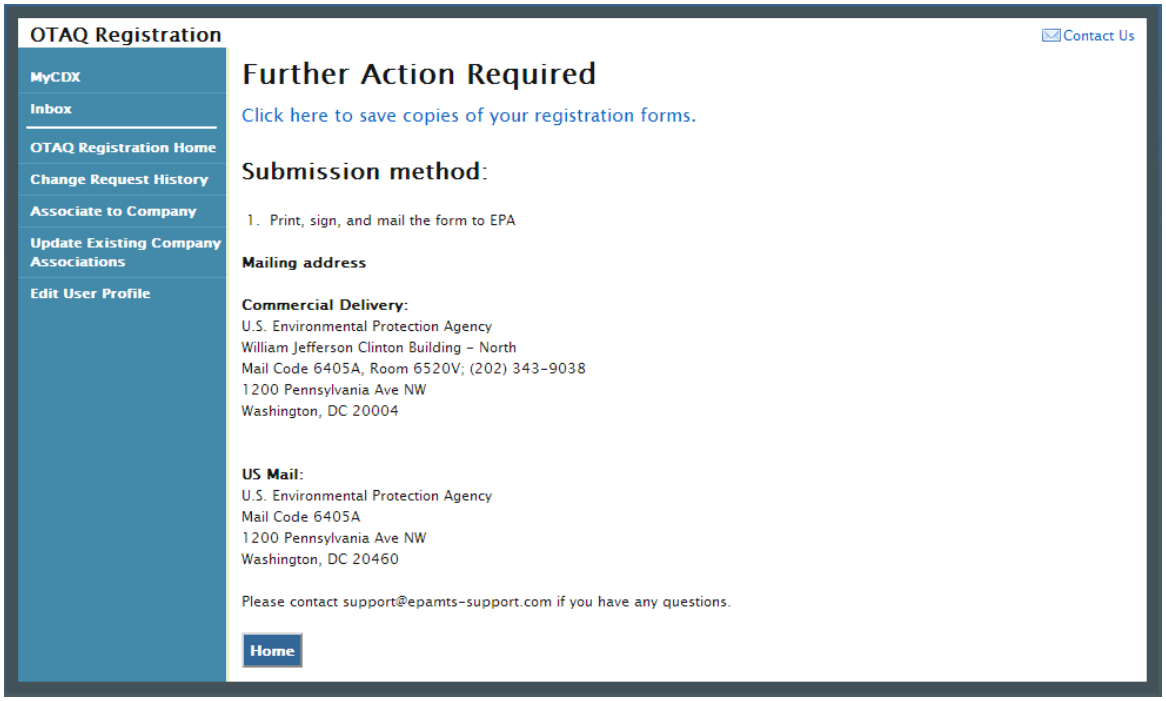
Note: The "Sign Electronically" button will only be displayed if the Fuels Program has received your CDX Electronic Signature Agreement. Otherwise a "Submit" button will be displayed.

Figure 3-13 Signature Confirmation and Print



If you prefer to hand-sign the RCO Delegation Letter, then click the "Print, Sign and Mail" button. Figure 3-14 will display. The request will also be listed in the Pending Requests section of your OTAQ Registration Home Page.

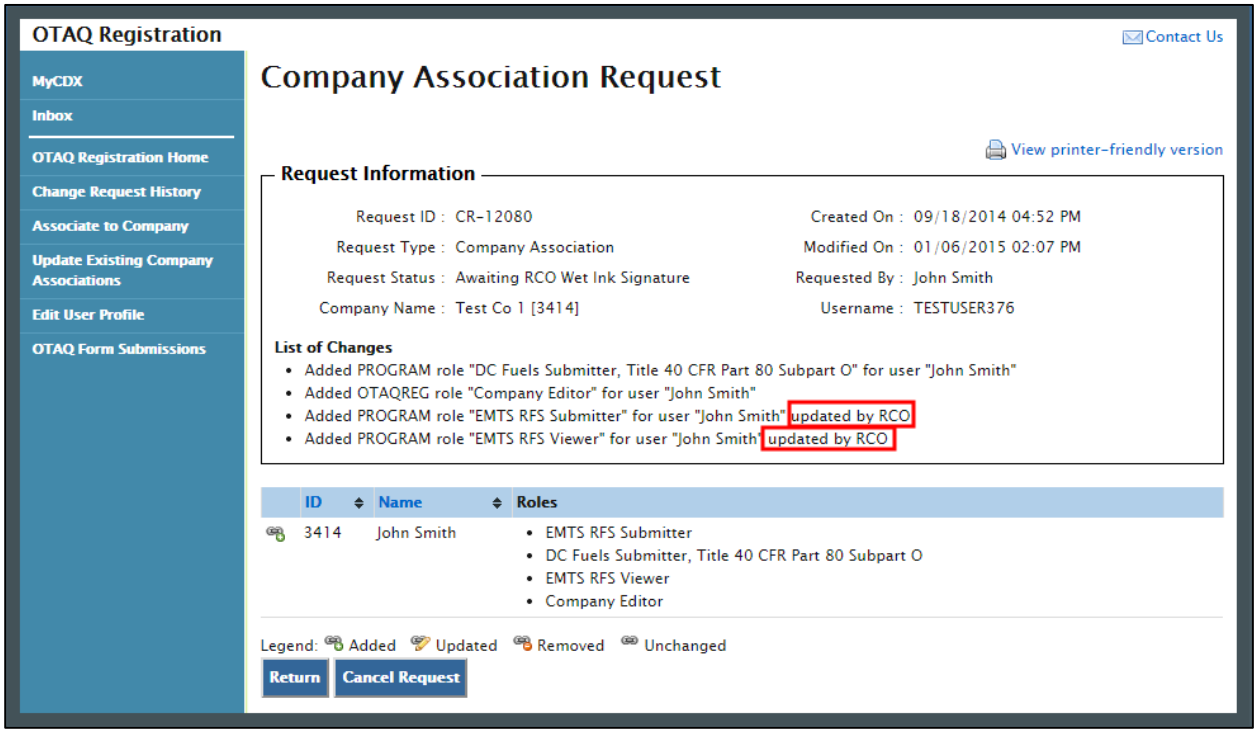
Figure 3-14 Further Action Required Page



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.

If you select the request from the Pending Requests queue, your changes will be displayed in the List of Changes section and appended with the following text: “updated by RCO”, as shown in Figure 3-15.

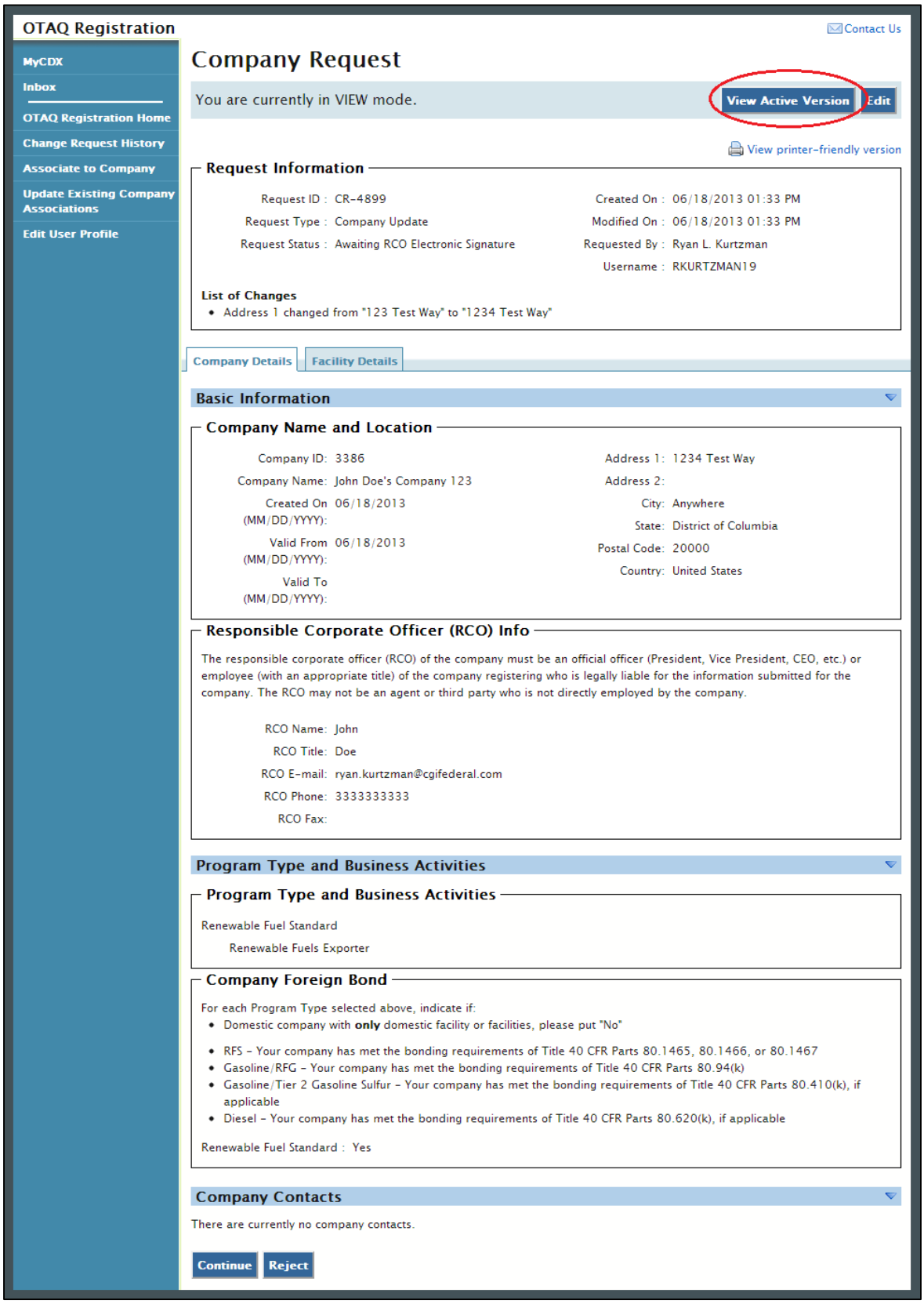
Figure 3-15 Company Association Request



3.2 Company Update Request

To act on a Company Update request, click the company name link for a request in your RCO Activation queue with the Company Update icon . Figure 3-16 will display.

Figure 3-16 Company Update Request



The Company Update request page displays the updated company record information, a list of changes, and actions to perform on the request. Additionally, you can view the active version of the company record by clicking the “View Active Version” button.

3.2.1 Approve Company Update Request

To approve a Company Update request, click the “Continue” button at the bottom of the page, as shown in Figure 3-17. Figure 3-18 will display.

Figure 3-17 Company Request Page

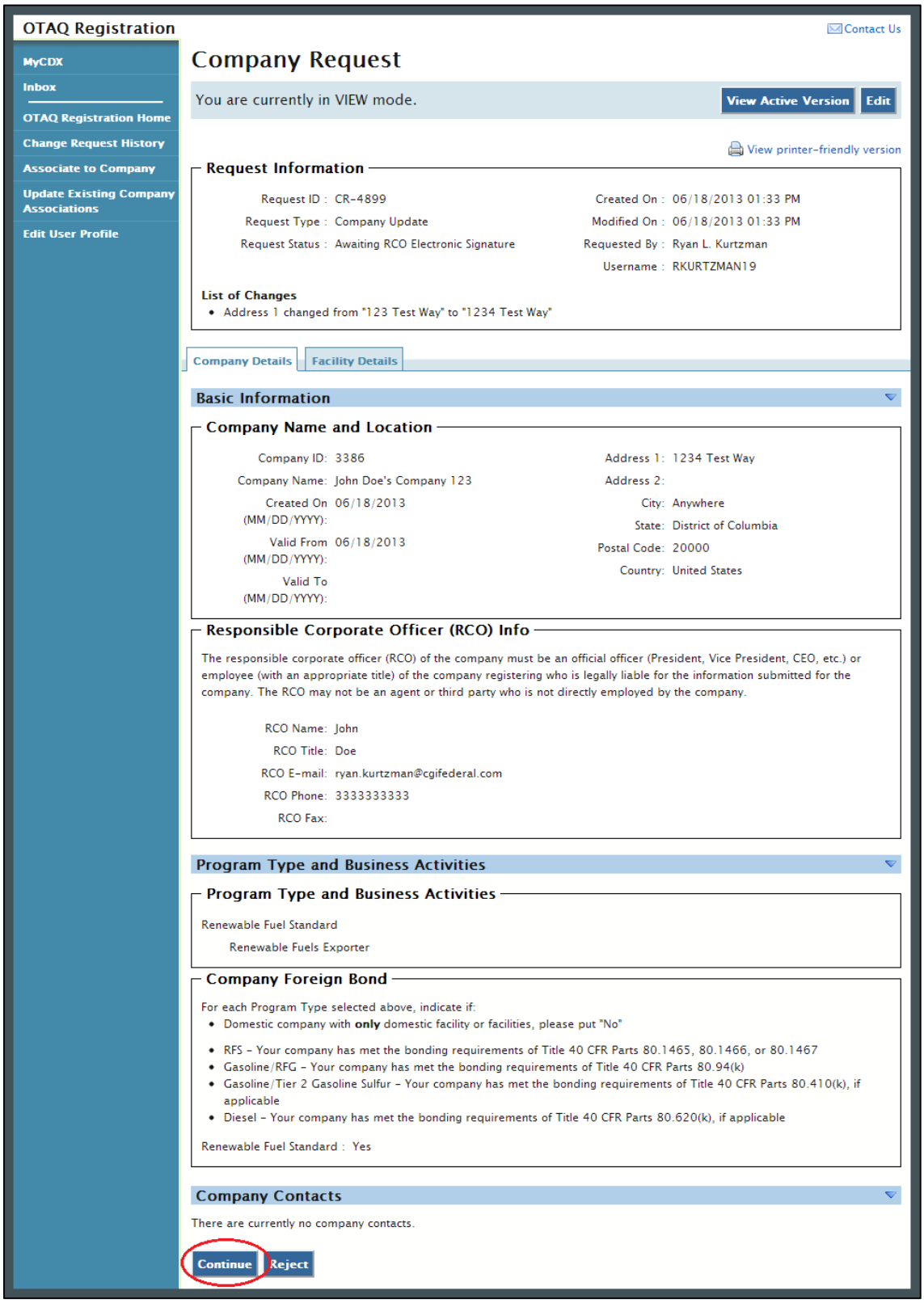
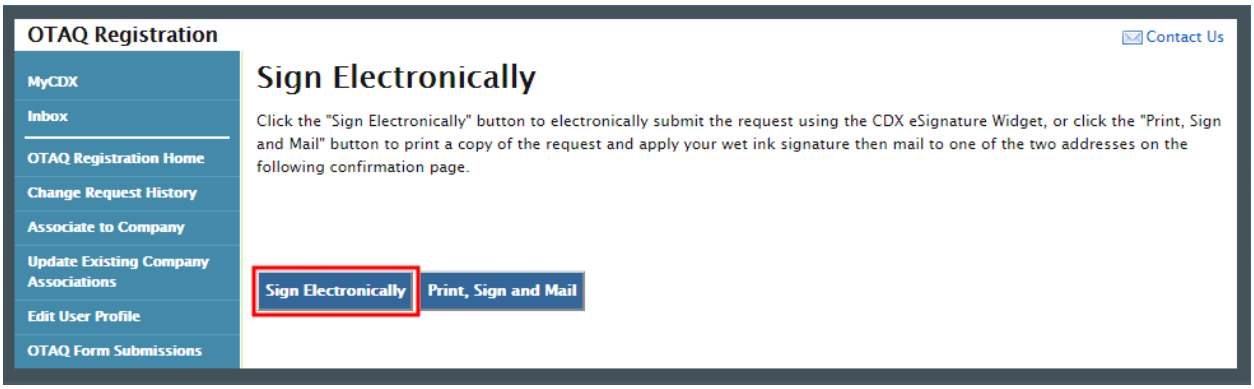


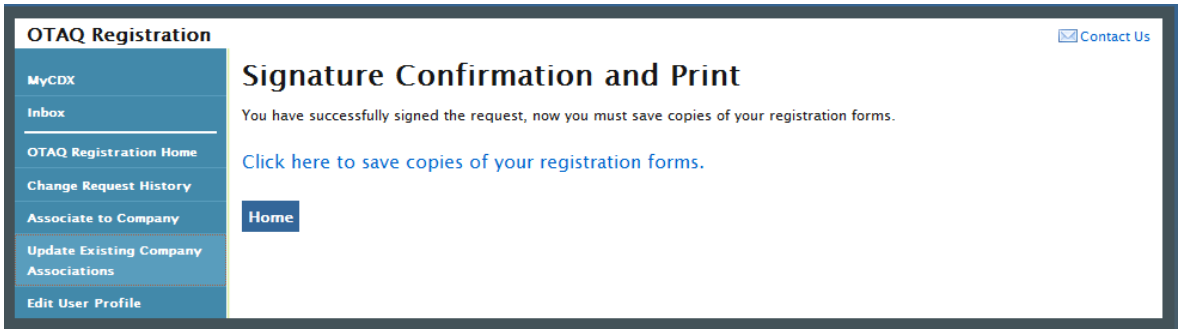
Figure 3-18 Sign Electronically Page



Click the "Sign Electronically" button to electronically sign the request. This will automatically apply your signature to the request and send it to EPA for review. An email will be sent to you and the user who initiated the Company Update request, containing a hardcopy of the request and confirming your request. The request will also be listed in the Pending Requests section of your OTAQ Registration Home Page. Please reference Appendix A: Using the e-signature Widget for instructions on signing electronically. Figure 3-19 displays the page that confirms your electronic signature.

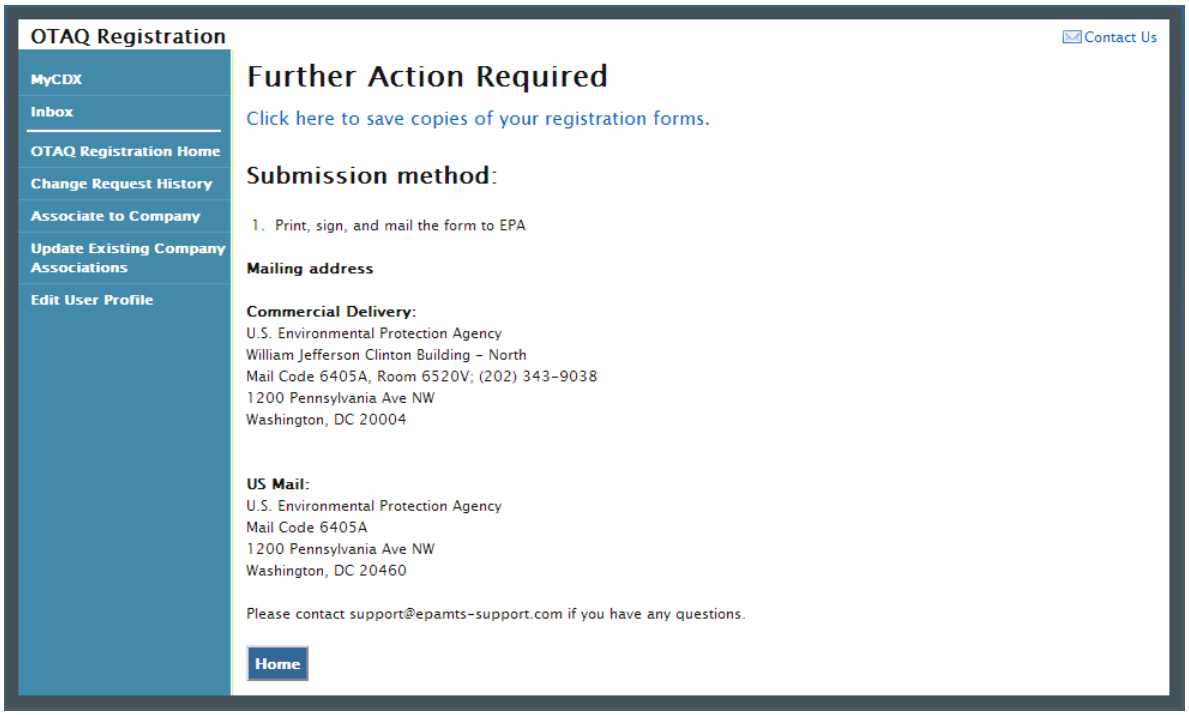
Note: The "Sign Electronically" button will only be displayed if the Fuels Program has received your CDX Electronic Signature Agreement. Otherwise, a "Submit" button will be displayed.

Figure 3-19 Signature Confirmation and Print



If you prefer to hand-sign the Company Update Request Letter, then click the "Print, Sign and Mail" button. Figure 3-20 will display.

Figure 3-20 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. The request will also be listed in the Pending Requests section of your OTAQ Registration Home Page.

3.2.2 Reject Company Update Request

To reject a Company Update request, click the "Reject" button at the bottom of the page, as shown in Figure 3-17. Figure 3-21 will display.

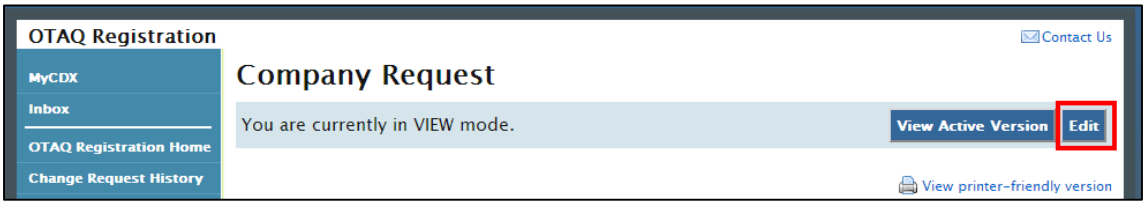
Figure 3-21 Enter Reason Screen

Before finalizing the rejection of a Company Update request, you are required to provide an explanation for your rejection. Provide these details by typing in the textbox. Then click the "Submit" button. The requesting user will receive an e-mail notification stating that their Company Update request has been rejected for the provided reasons.

3.2.3 Edit Company Update Request

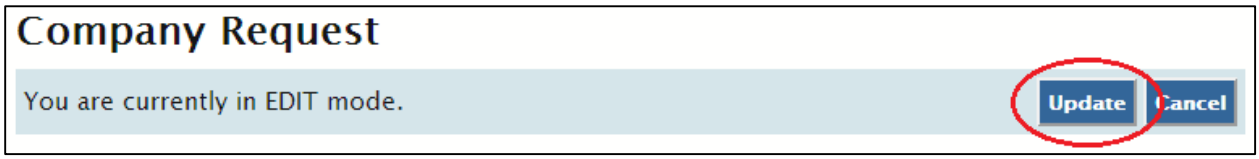
To edit a Company Update request click, the "Edit" button displayed at the top of the request page, as shown in Figure 3-22.

Figure 3-22 Edit Company Update Request



The page will display an updated header stating you are in "EDIT mode", as shown in Figure 3-23. The company's information will now be editable. Update the company information by typing in the available textboxes and/or selecting new radio buttons and checkboxes. Click the "Update" button in the header once you have completed your updates.

Figure 3-23 Edit Mode



The updated information will now display in the List of Changes section, as shown in Figure 3-24. If the updated information is correct, click the "Continue" button. Figure 3-25 will display.

Figure 3-24 Updated List of Changes

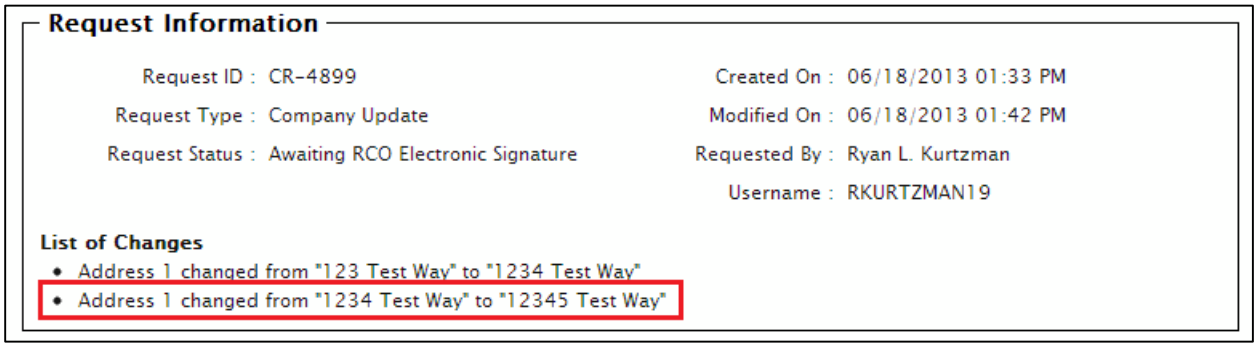
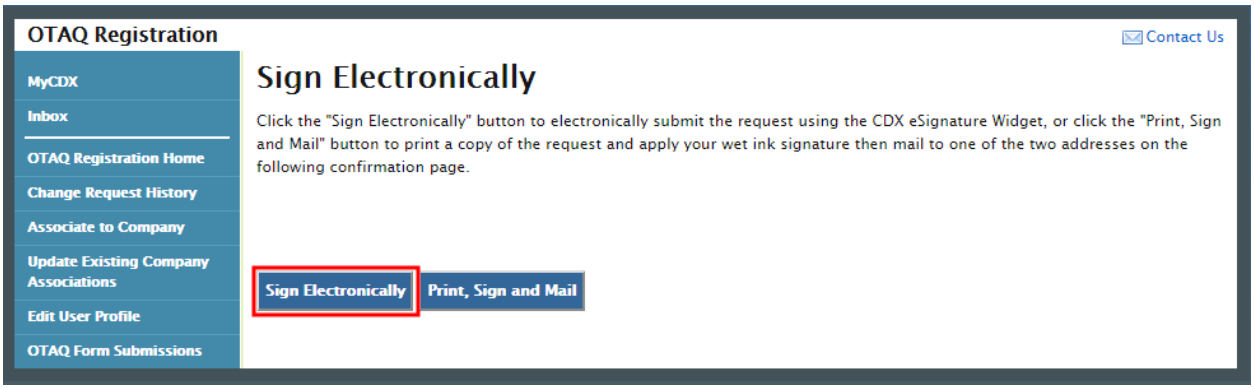


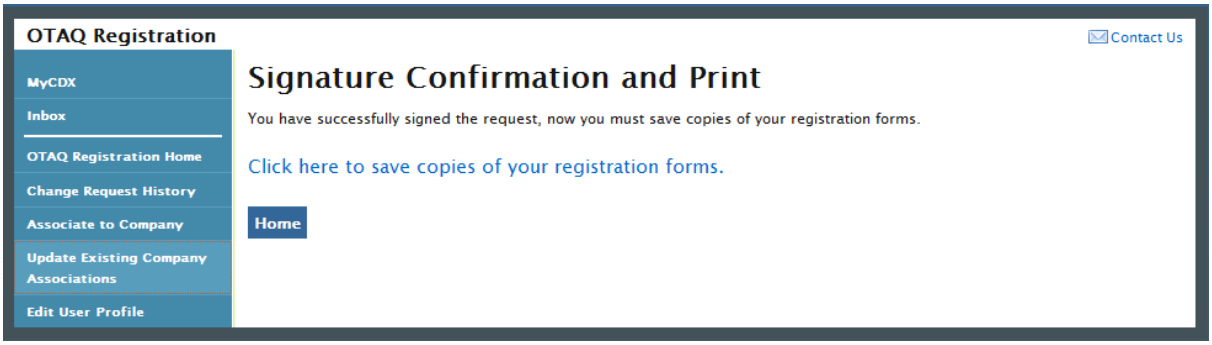
Figure 3-25 Sign Electronically Page



Click the "Sign Electronically" button to electronically sign the request. This will automatically apply your signature to the request and send it to EPA for review. An email will be sent to you and the user who initiated the Company Update request, containing a hardcopy of the request and confirming your request. The request will also be listed in the Pending Requests section of your OTAQ Registration Home Page. Please reference Appendix A: Using the e-signature Widget for instructions on signing electronically. Figure 3-26 will display to confirm your electronic signature.

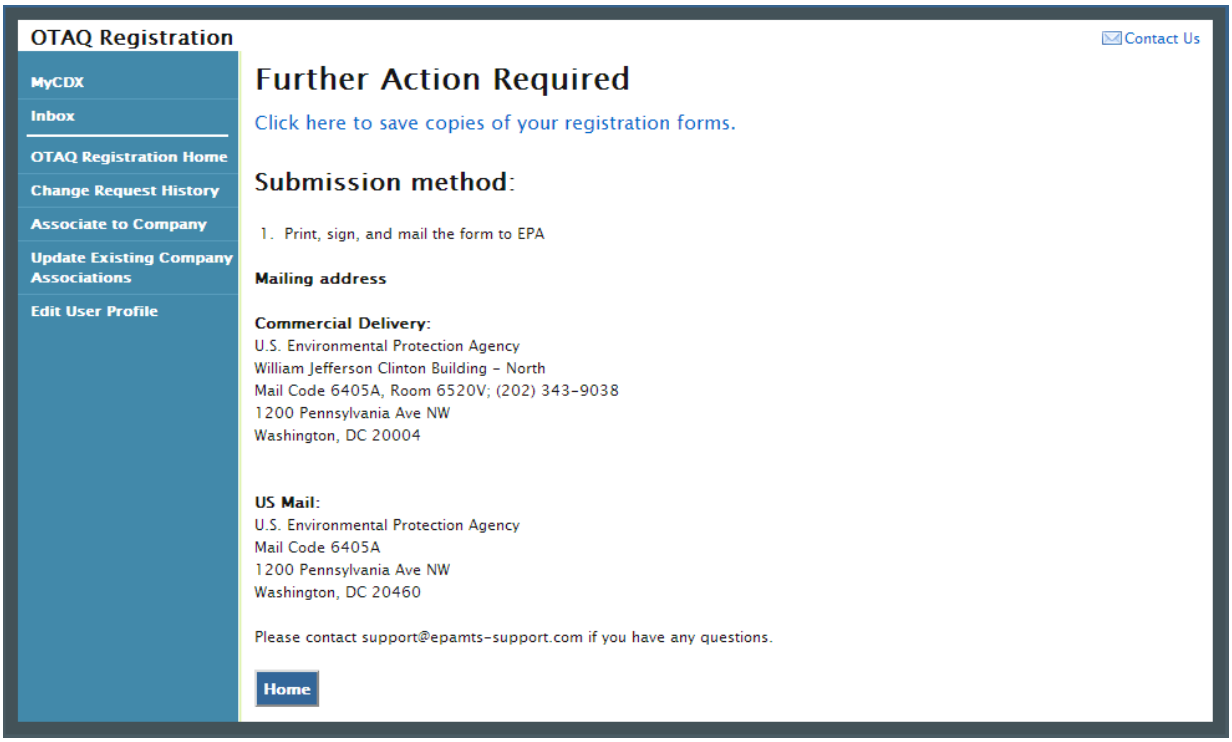
Note: The "Sign Electronically" button will only be displayed if the Fuels Program has received your CDX Electronic Signature Agreement. Otherwise a "Submit" button will display.

Figure 3-26 Signature Confirmation and Print



If you prefer to hand-sign the Company Update Request Letter, then click the "Print, Sign and Mail" button. Figure 3-27 will display.

Figure 3-27 Further Action Required Page



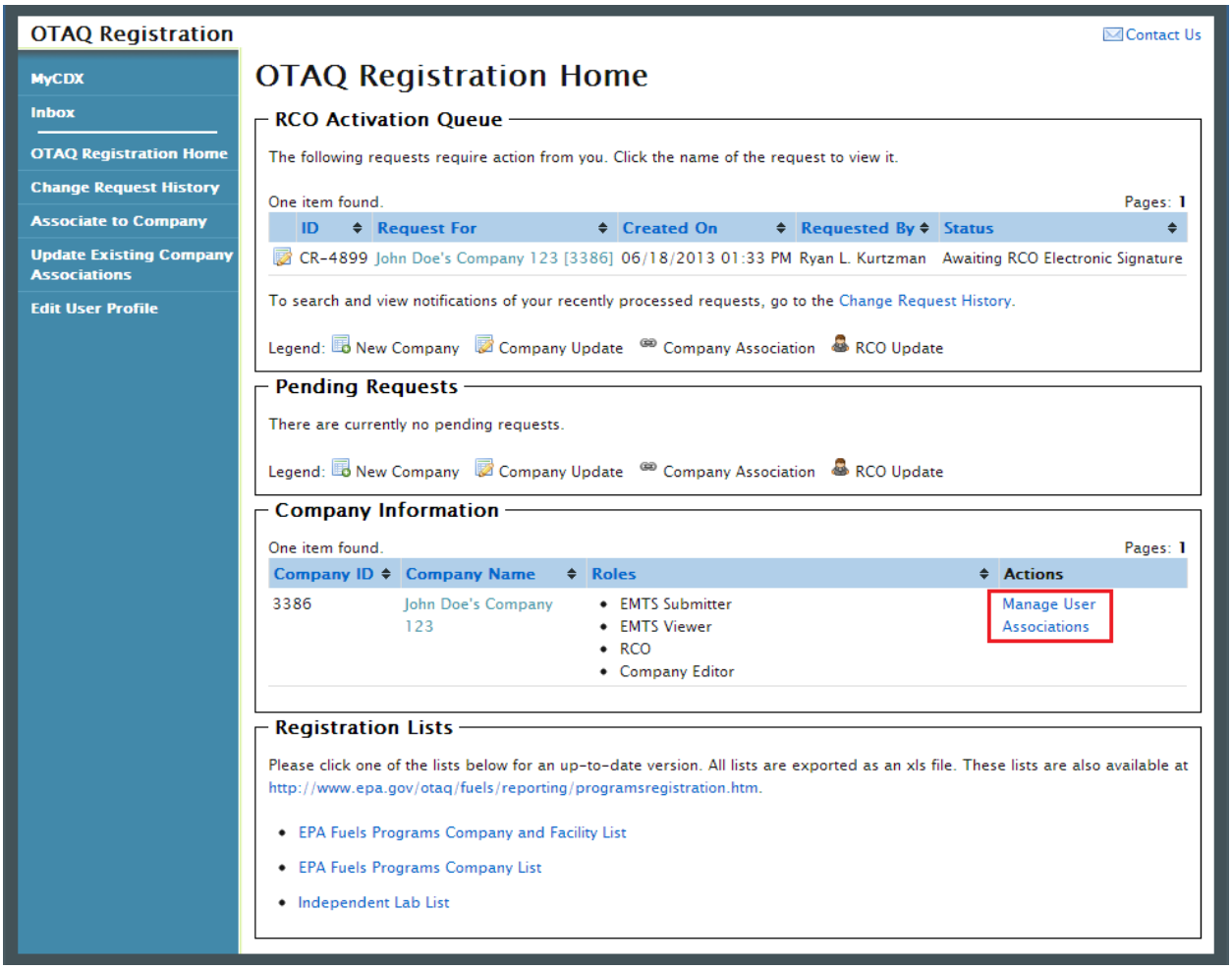
Click the “Click here to save copies of your registration forms” link to save a hard copy of the registration forms in PDF form. It is required that you save a copy of your registration forms after submitting your request. If you attempt to select the “Home” button without first saving a copy of your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

4 Managing User Associations

OTAQReg system RCOs can manage user associations for their company. The following section provides details on how to remove user associations and edit user roles for your company.

To manage user associations, click the “Manage User Associations” link in the Company Information section, as shown in Figure 4-1.

Figure 4-1 RCO OTAQ Registration Home Page



4.1 Edit User Roles

The Manage User Associations page displays all users currently associated to your company and their active roles. To edit a user’s roles, click the roles link next to the user you would like to edit, as shown in Figure 4-2. Figure 4-3 will display.

Figure 4-2 Manage User Associations Page

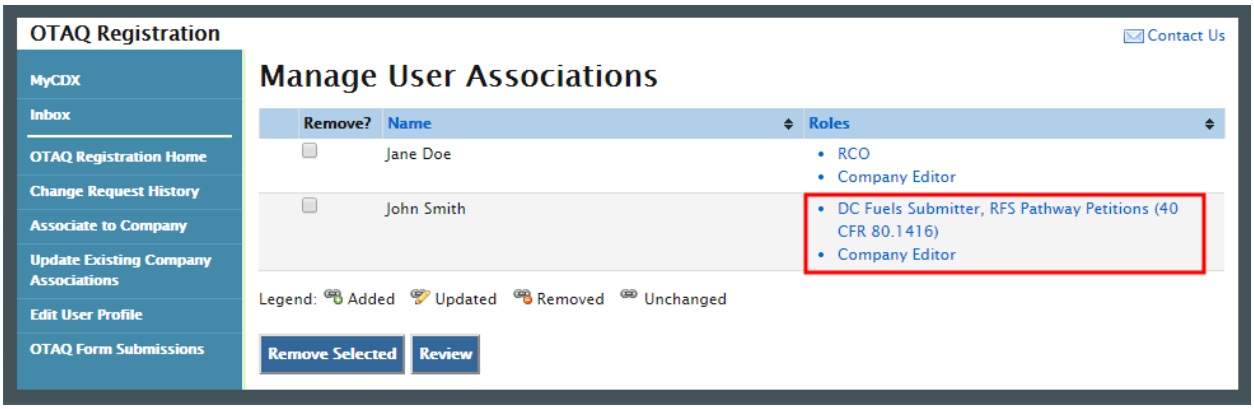
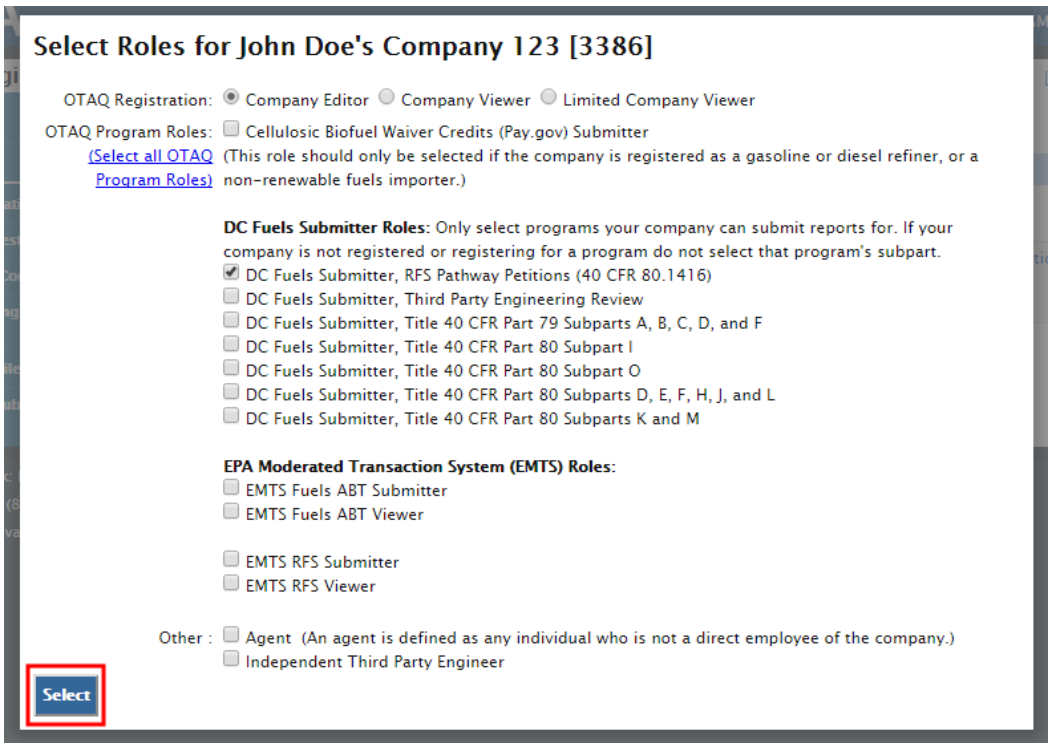


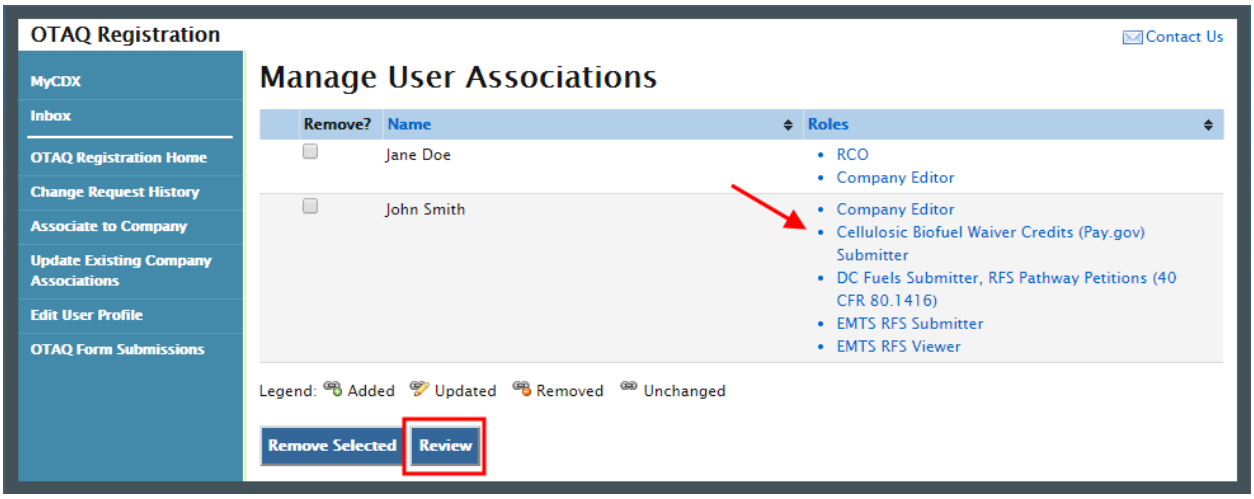
Figure 4-3 Select Roles Screen



The user's existing roles will be pre-selected on the page. Select updated OTAQ Registration and Program roles by selecting a new radio button and/or checkboxes. You may select only one OTAQ Registration role however multiple OTAQ Program roles are allowed.

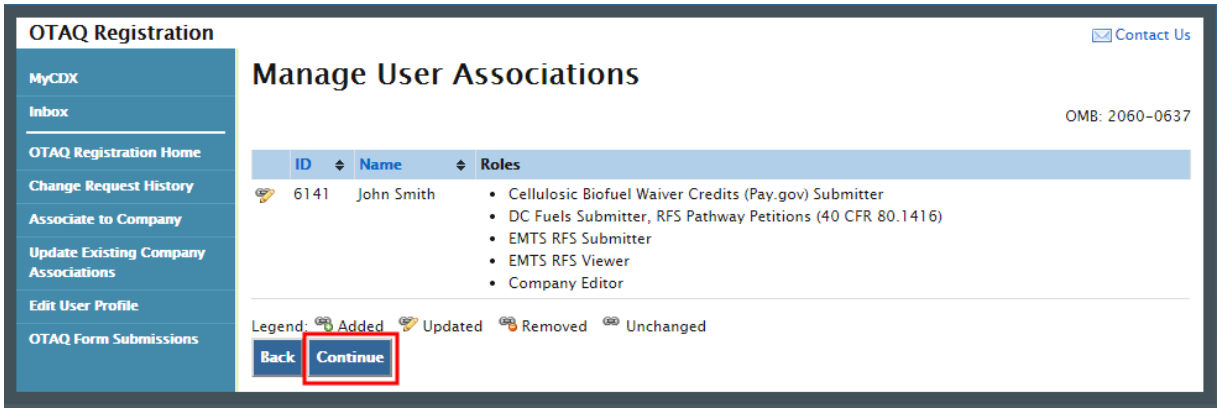
Click the "Select" button once you have made your selections. Figure 4-4 will display.

Figure 4-4 Updated Manage User Associations Page



The updated user roles are displayed on the Manage User Associations Page. If the updates are correct, click the "Review" button. Figure 4-5 will display.

Figure 4-5 Manage User Associations Review Page

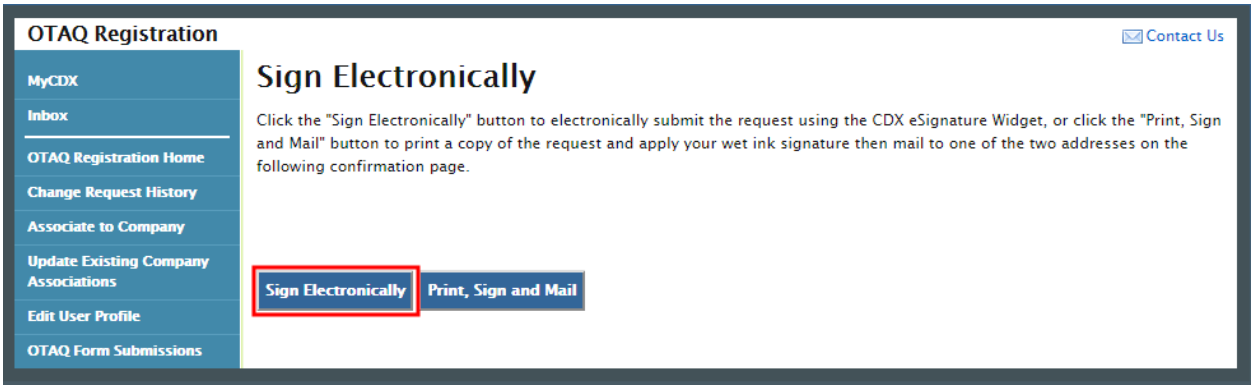


Review the updates once more and click the “Continue” button. Figure 4-6 will display.

Figure 4-6 Further Action Required Pop-up

Click “OK” to Close the pop-up and continue to the next page. Figure 4-7 will display.

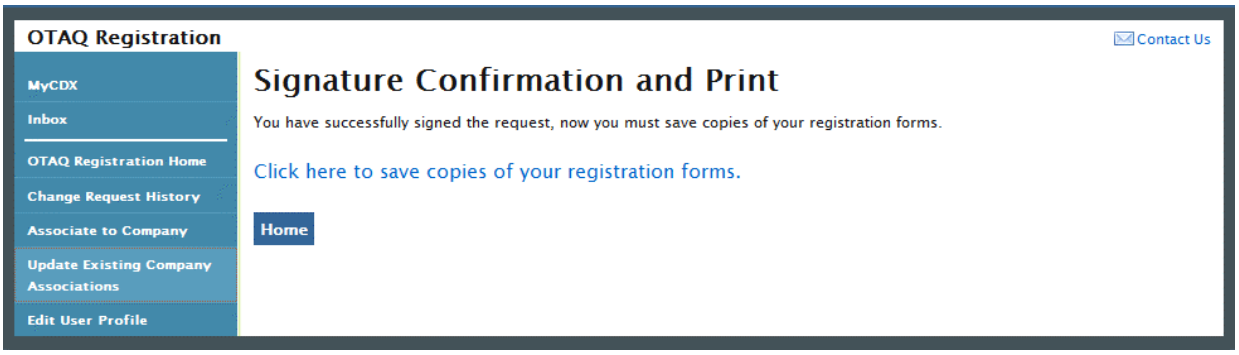
Figure 4-7 Sign Electronically



Click the “Sign Electronically” button to electronically sign the request. This will apply your signature to the request and automatically complete the company association. An email will be sent to you and the user who was modified through the Company Association request, containing a hardcopy of the request and confirming your request. Please reference Appendix A: Using the e-signature Widget for instructions on signing electronically. Figure 4-8 will display to confirm the completion of the company association request.

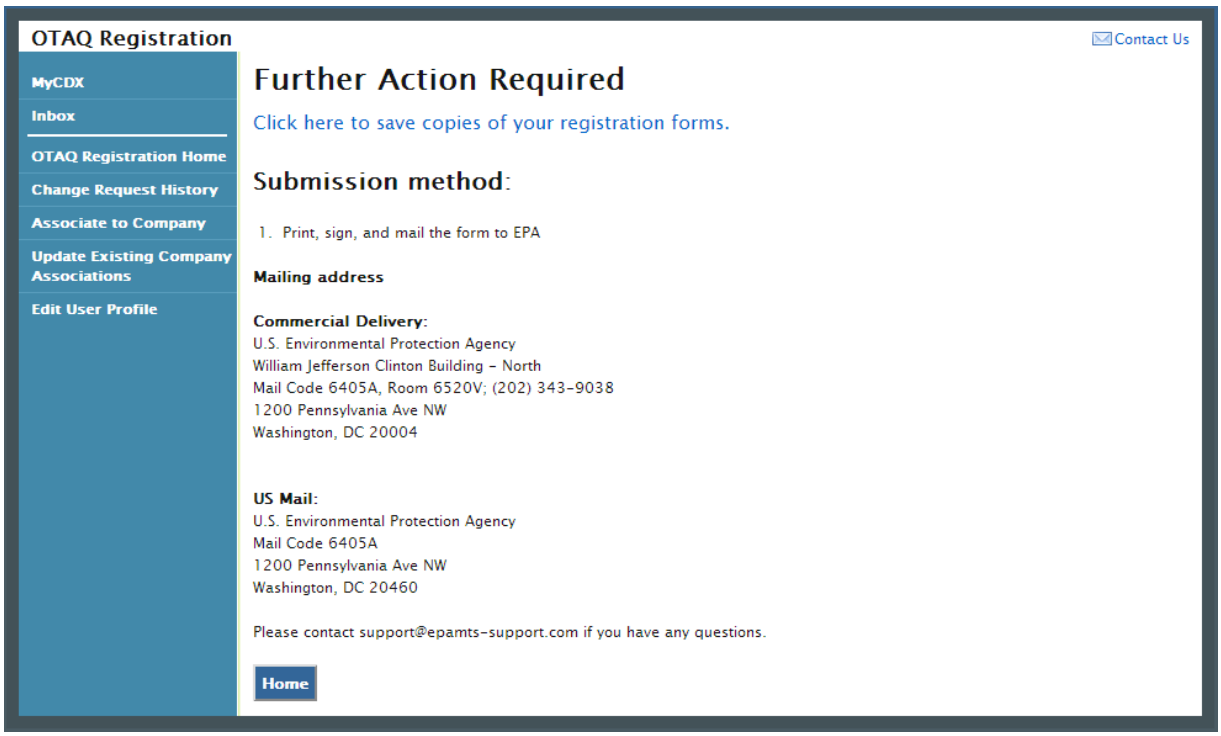
Note: The “Sign Electronically” button will only be displayed if the Fuels Program has received your CDX Electronic Signature Agreement. Otherwise a “Submit” button will be displayed.

Figure 4-8 Signature Confirmation and Print Page



If you prefer to hand-sign your User Association Letter, click the "Print, Sign and Mail" button. Figure 4-9 will display.

Figure 4-9 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. The request will also be listed in the Pending Requests section of your OTAQ Registration Home Page.

4.2 Remove User Associations

To remove a user's association from your company, select the checkbox next to the user you wish to remove and click the "Remove Selected" button, as shown in Figure 4-10. Figure 4-11 will display.

Figure 4-10 Manage User Associations Page

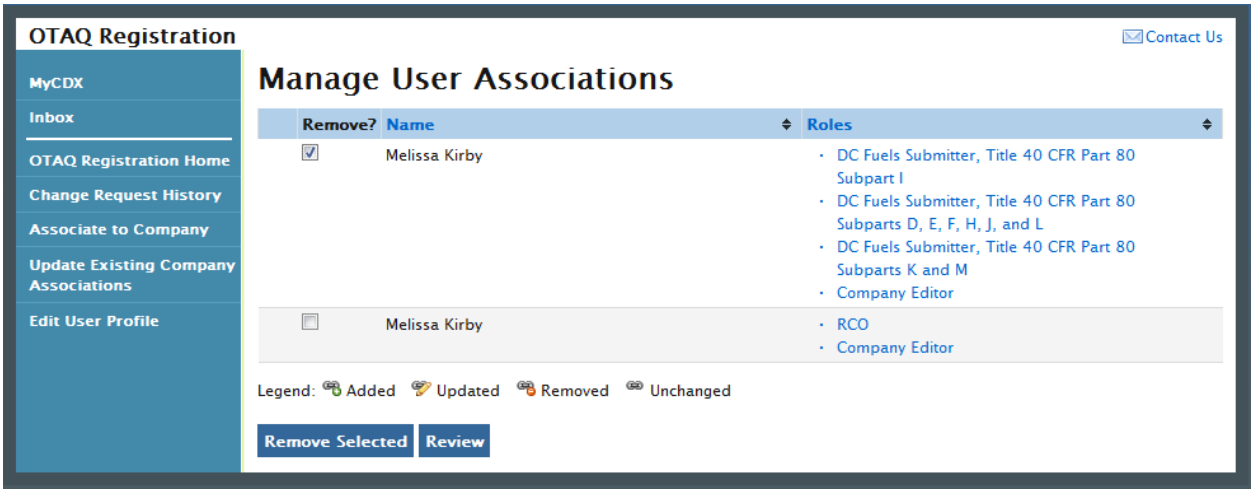
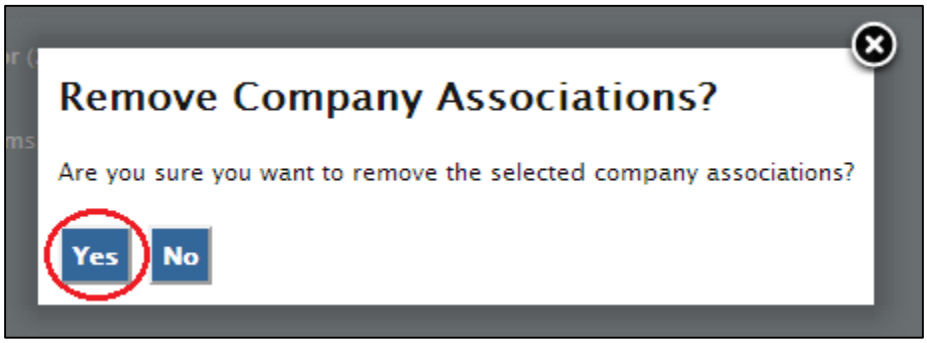
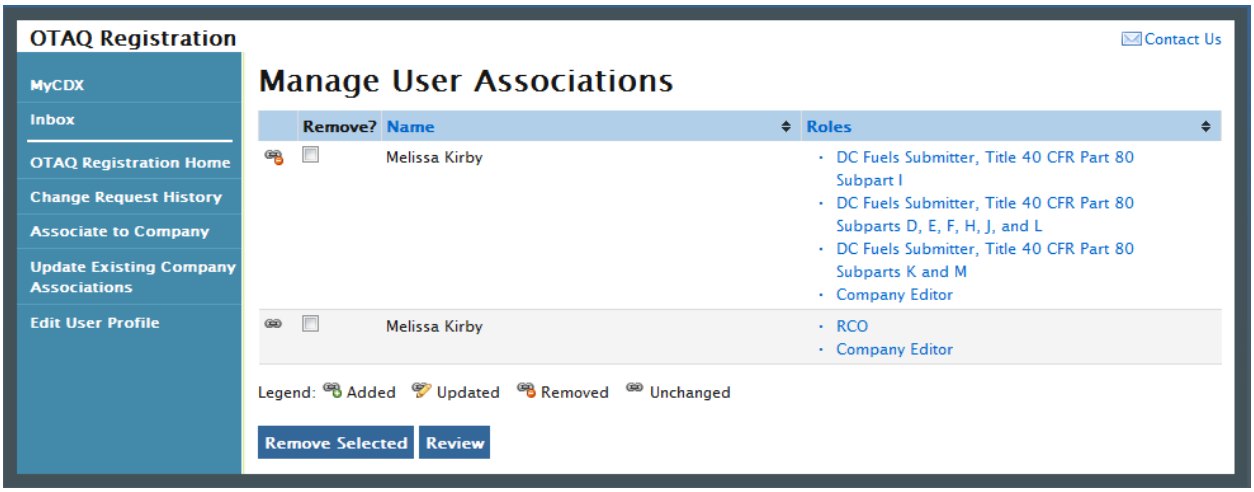


Figure 4-11 Remove Company Association



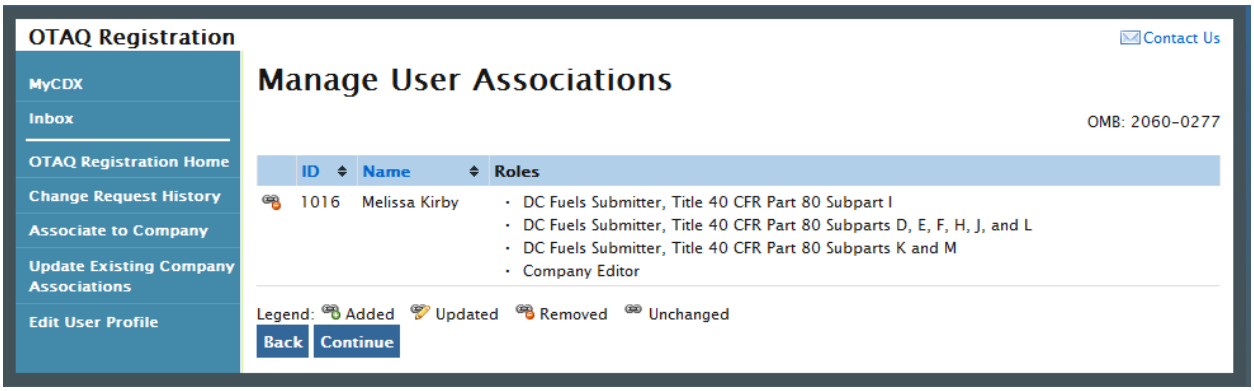
To confirm your removal, click the "Yes" button. Figure 4-12 will display.

Figure 4-12 Manage User Associations Page



The removed icon will display next to the user. Click the “Review” button. Figure 4-13 will display.

Figure 4-13 Print and Sign Page

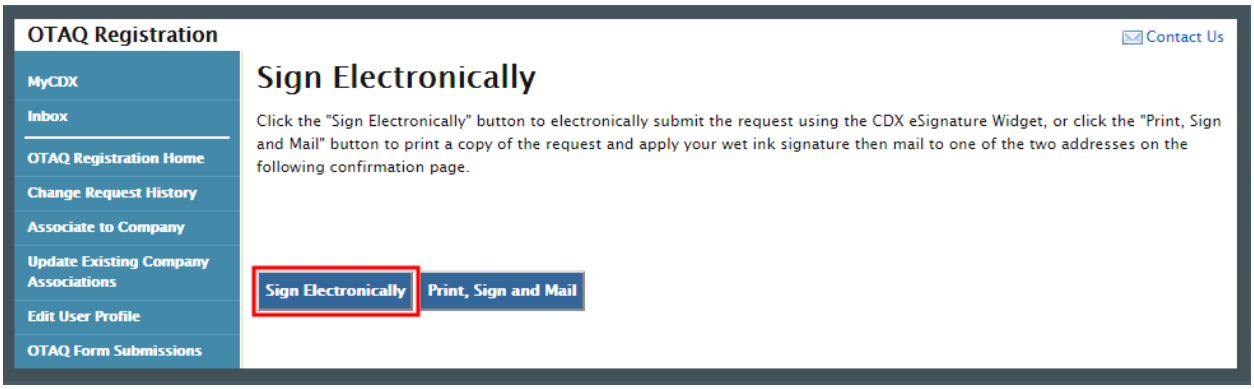


Confirm the removal by clicking the "Continue" button. Figure 4-14 will display.

Figure 4-14 Further Action Required Pop-up

Click "OK" to Close the pop-up and continue to the next page. Figure 4-15 will display.

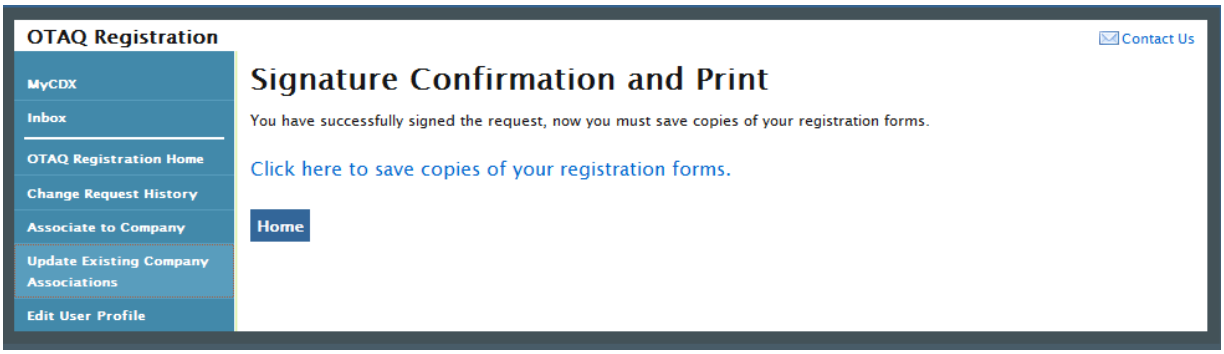
Figure 4-15 Sign Electronically



Click the "Sign Electronically" button to electronically sign the request. This will apply your signature to the request and automatically complete the company association. An email will be sent to you and the user who was modified through the Company Association request, containing a hardcopy of the request and confirming your request. Please reference Appendix A: Using the e-signature Widget for instructions on signing electronically. Figure 4-16 will display to confirm the completion of the company association request.

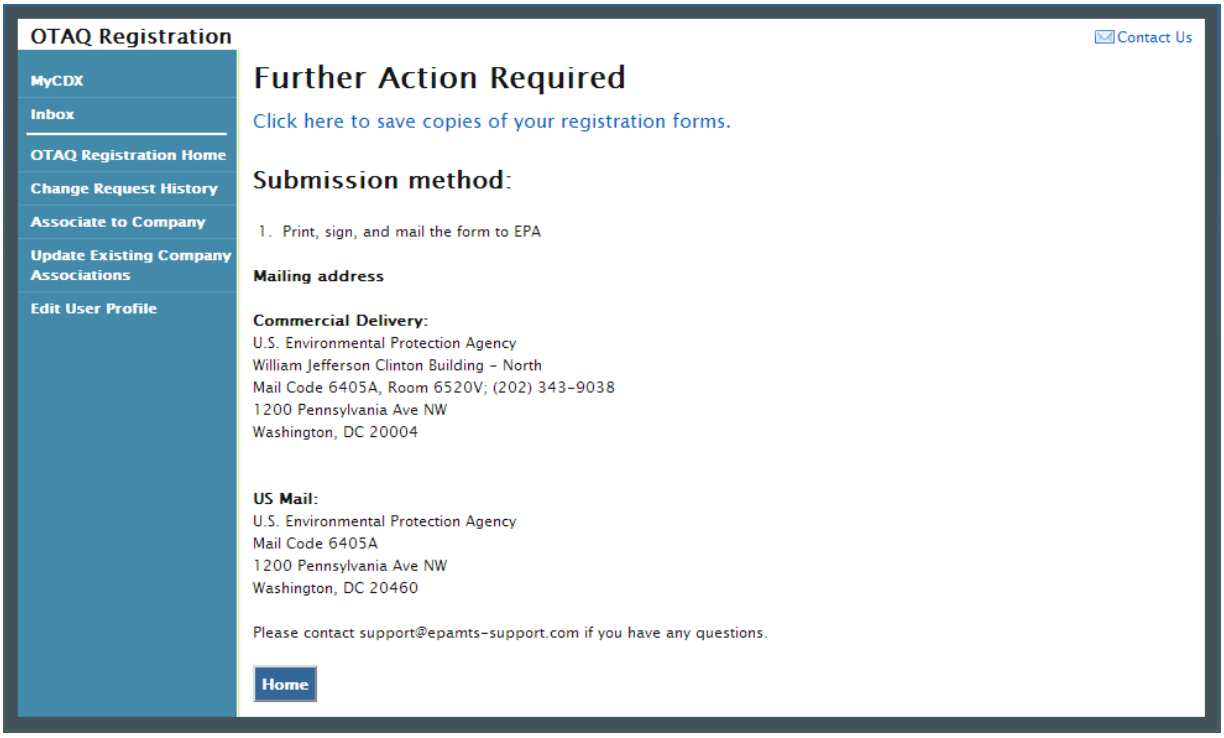
Note: The "Sign Electronically" button will only be displayed if the Fuels Program has received your CDX Electronic Signature Agreement. Otherwise a "Submit" button will display.

Figure 4-16 Signature Confirmation and Print



If you prefer to hand-sign the Company Update Request Letter, then click the "Print, Sign and Mail" button. Figure 4-17 will display.

Figure 4-17 Further Action Required Page



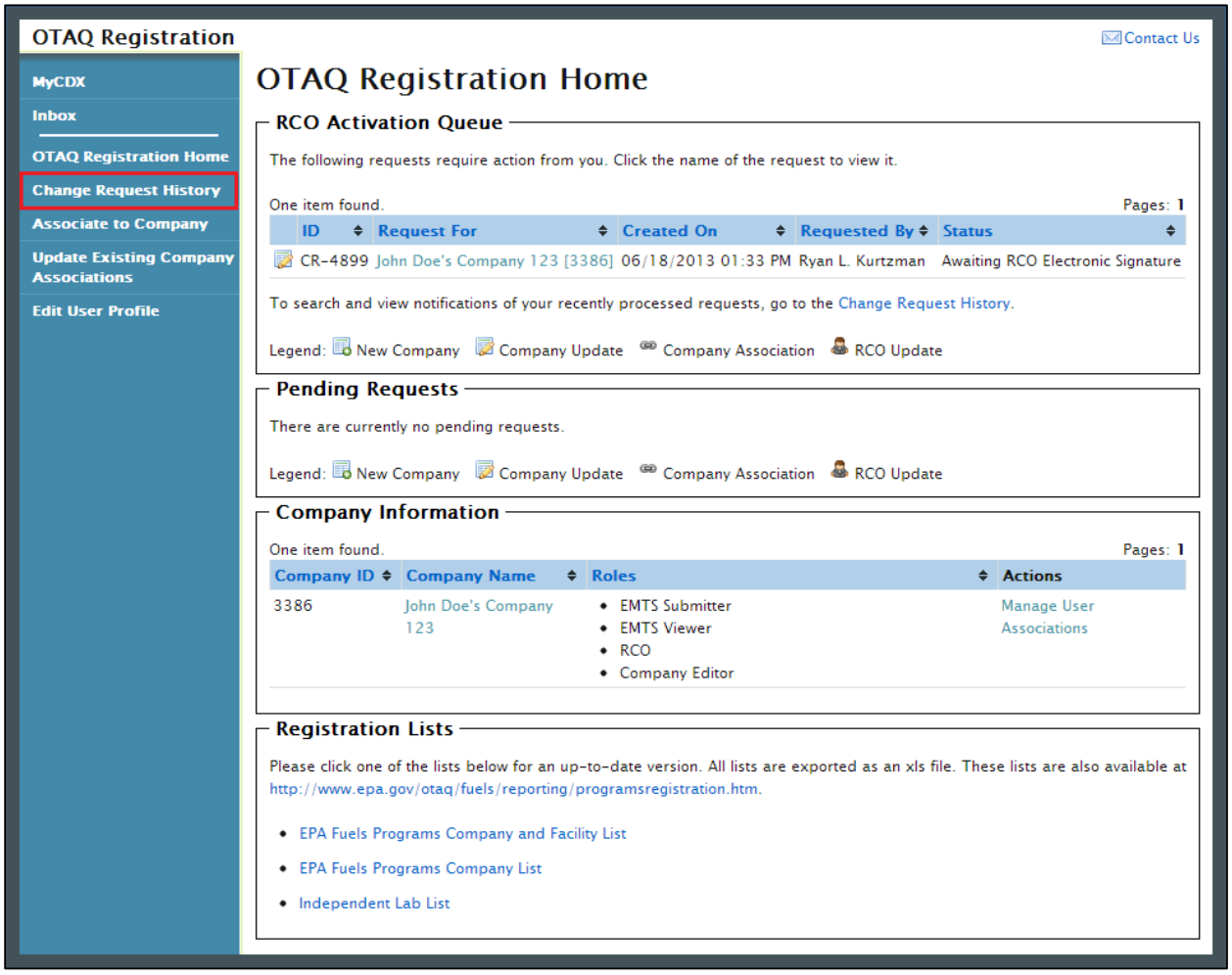
Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms after submitting your request. If you attempt to select the "Home" button without first saving a copy of your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

5 Viewing RCO Change Request History

OTAQReg system RCOs may view the history of all change requests for the companies that they are registered as RCOs for. The following section provides details on how to view and search for change requests.

To access the history of all change requests for companies for which you are the registered RCO, select the “Change Request History” link on the left sidebar, as shown in Figure 5-1.

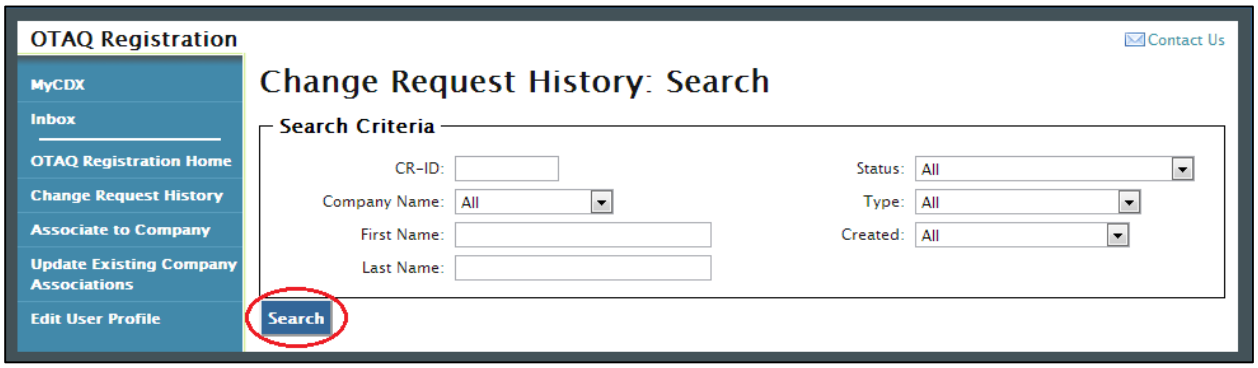
Figure 5-1 RCO OTAQ Registration Home Page



5.1 Search Change Requests

The Change Request History: Search page displays the search criteria fields in order to search for change requests associated with companies for which you are the registered RCO, as shown in Figure 5-2.

Figure 5-2 Change Request History: Search Page



You may filter your search based on the following fields:

- CR-ID: Change Request ID Number
- Company Name: Name of the Company
- First Name: Requestor's First Name
- Last Name: Requestor's Last Name
- Status: Change Request Status
- Request Type: Change Request Type
- Created: Date Created

The Company Name field will display all companies in OTAQReg for which you are the RCO. To initiate your search, click the "Search" button. Figure 5-3 will display.

Figure 5-3 Change Request History: Search Results Page

To refine your search criteria or to conduct a new search, click the "Back" button. You will be taken back to the Change Request History: Search Page, as seen in Figure 5-2.

If you would like to export the search results to save or open on your personal computer, click the “CSV” or “Excel” links below the Search Results table. This will initiate a dialogue box which will allow you to download the results of the change request history search.

To view the details of a particular change request, click the Company Name link. Figure 5-4 will display.

Figure 5-4 Change Request Details Page

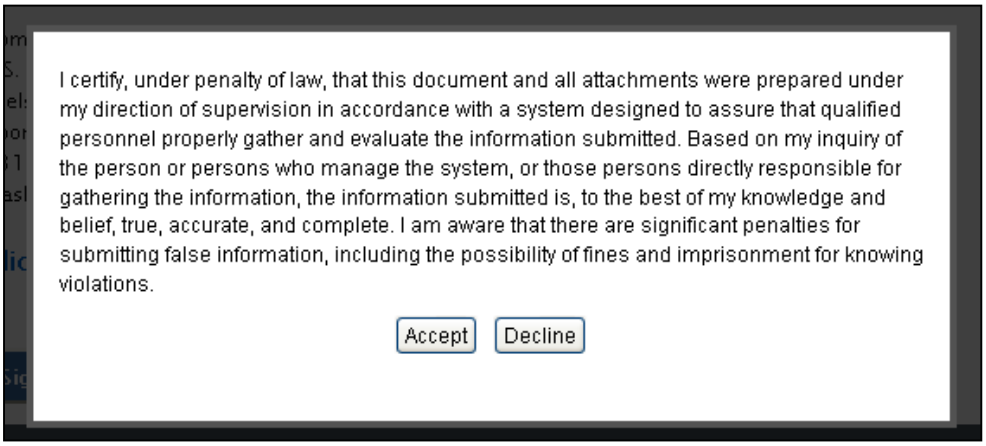
The Change Request Details page displays detailed change request information, as well as the list of changes requested by you or the user who initiated the change request. To refine your search criteria or to conduct a new search, click the “Return to Search” button.

6 Appendix A: Using the e-signature Widget

The following section provides RCOs the steps to successfully sign submissions within the OTAQReg application.

Upon selecting the “Submit” button for an OTAQReg submission, you will be prompted with the certification statement displayed in Figure 6-1.

Figure 6-1 Certification Statement



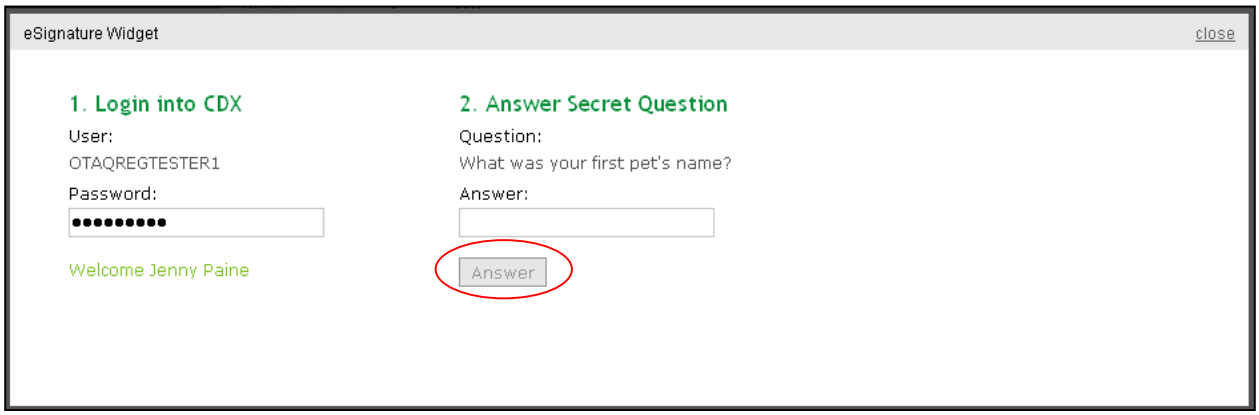
Upon reading the full agreement, click the “Accept” button. Figure 6-2 will display.

Figure 6-2 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 6-3 will display.

Figure 6-3 Answer Secret Question

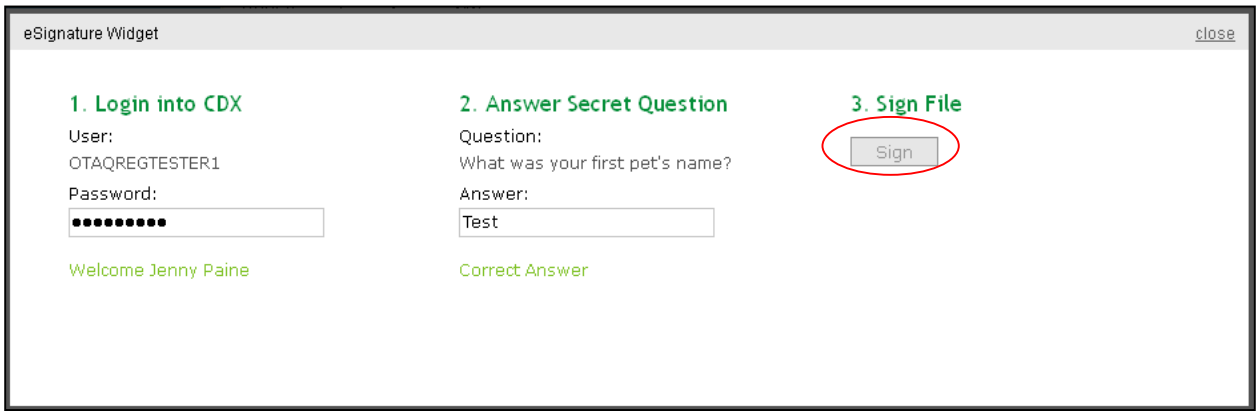


The next step is to provide the answer to your secret question. The page will display one of the five secret questions you chose during your e-signature PIN verification.

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 6-4 will display.

Figure 6-4 Sign File



Click the "Sign" button. You have successfully electronically signed your OTAQReg submission.

7 Appendix B: 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.htm.

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.

If you need assistance logging into CDX, please contact the CDX Help Desk at:

- 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.