Introduction

This user guide describes the process that individuals or company/organization points of contact (POCs) must follow to submit non-EPA personnel data through the EPA’s Central Data Exchange (CDX) iBoard application for review and approval. This document covers CDX registration and how to successfully submit information through iBoard.

IMPORTANT
Each person submitting information through iBoard must have a unique CDX User ID and Password. Do not share your User ID or Password with anyone. And, do not use anyone else’s User ID or Password.

It is recommended that personnel information be submitted via web form, because it is the most secure way to submit information. Web forms can be submitted individually or in groups of 15 or fewer. If your contract includes more than 15 individuals and you are the POC submitting everyone’s information, simply make multiple group submissions.

The iBoard application shuts down after 20 minutes of inactivity. If a process is not completed when the application shuts down, information is lost and must be added again. The clock on the left of your screen shows you how much time remains.

If you have questions about the process or policies, please contact the Personnel Security Branch at personnel_security@epa.gov.

Questions related to the Central Data Exchange (CDX) can be directed to any of the following:

- Person-to-person telephone support is available from the CDX Help Desk Monday through Friday 8 a.m. to 6 p.m. Eastern time. Call toll free at 888-890-1995.
- Send an email to helpdesk@epacdx.net, with “Technical Support” in the subject line.
- Fax requests are accepted 24 hours a day at 703-227-4199. Support personnel will respond to faxed requests Monday through Friday from 8 a.m. to 6 p.m. Eastern time.
Scope
These procedures apply only to the process for bringing non-EPA personnel (contractors, grantees, etc.) on board at EPA.

Definitions
A number of terms used throughout this document are defined as follows:

EPA Contractor
An EPA Contractor is someone who is on a contract managed directly by the EPA. Each EPA contractor has an EPA Contracting Officer (CO) and an EPA Contracting Officer’s Representative (COR).

Non-EPA Contractor
A Non-EPA Contractor works at/for the EPA on a contract managed by an agency other than EPA. (Neither the CO nor the COR work for EPA, so for iBoard/CDX purposes, use your EPA federal contact information.)

Non-EPA Personnel
Personnel who work for or at the EPA but not under a Standard Form 52 originated by the EPA (e.g., EPA contractors, non-EPA contractors, grantees, SEEs, volunteers, etc.).

Student Services Contractor
A Student Services Contractor works for the EPA and is considered to be the only person on the contract. (Each student has an EPA CO and an EPA COR).

SEE Program Member
Someone who works at the EPA through the Senior Environmental Employment (SEE) Program as an experienced individual who is lent to the EPA through a cooperative agreement with another organization. (The SEE Program Office is the COR.)

Volunteer
A volunteer completes services without payment from EPA or any outside agency/company. (Their EPA federal point of contact acts as the COR).

Intergovernmental Personnel Act (IPA) Agreements (e.g., ORISE Interns, Grantees, Others)
Some individuals work at the EPA by way of IPA agreements between the EPA and other federal or nonfederal organizations. Their EPA federal point of contact acts as the COR.

Contracting Officer (CO) / Grant Officer (GO) / Program Officer (PO) / SEE Monitor
The CO, GO, PO or SEE Monitor is the federal EPA employee who oversees the contract/grant process.

Contracting Officer’s Representative (COR)
A COR manages the on-boarding process for non-EPA personnel and oversees their work at the EPA. He/she also sponsors those who are eligible for an EPASS badge.
Section 1: CDX and iBoard Registration for New Users

To access iBoard, you must be registered to use CDX:

- If you are already registered to use CDX, please advance to “Section 2: Submitting Non-EPA Personnel Information.”
- If you have not yet registered for CDX, please go to this URL (http://cdx.epa.gov/epa_home.asp). Then follow the instructions below to complete your CDX and iBoard registrations.

Each user only has to register once.

1.1 At the “Central Data Exchange (CDX) Home” page, click the Register with CDX button.
1.2 Scroll through and read the “Terms & Conditions.”

Take special note of the requirement for and characteristics of the password you must create.

Click the I Accept and Proceed buttons.
1.3 At the “CDX Registration” page, in the “Active Program Services List” search box, type iBoard.

As you type, the iBoard link appears in the field below. Click the “iBoard: EPA Internet On Boarding Application” link.

1.4 In the “Part 1: User Information” section, type the required information in fields noted with an asterisk: User ID, title, first name, last name, password, re-type password, and responses to security questions 1, 2 and 3.

**Important Notes:**
- Information on this page refers to you, not the EPA or your employer. You are creating your own unique User ID.
- If the drop-down menu in the “Title” field doesn’t work, it may mean that your User ID already is being used (error notations may appear in red and remain on the screen for a few moments). The more unique your User ID is, the less chance of this error. (e.g., “JohnSmith” would not be a good user ID as it is not sufficiently unique; perhaps add a meaningful number or word, such as “JohnSmithNFL.”) If the problem persists, call the CDX Help Desk at 1-888-890-1995 or create another User ID.
- Your password must include at least 8 alpha-numeric characters: at least one must be uppercase, at least one must be lowercase, and at least one number must be used.
- Be sure to remember the User ID, Password, and Security Question Responses that you choose. You’ll need to use them again.
- Each person submitting information through iBoard must have a unique CDX User ID and Password. Do not share your User ID or Password with anyone, and do not use anyone else’s User ID or Password. For future reference, be sure to remember the User ID and Password you choose.

Upon completing the required fields, move to “Part 2: Organization Information” and click the Search button. (Note: Don’t type anything in the text field adjacent to the Search button, just click Search.)
1.5 The following message appears: “Too many organizations found. Please refine your search using the advanced search below and try again.”

You do not need to refine your search; instead, click the “request that we add your organization” link. (The “Use advanced search” link often requires repeated attempts.)

1.6 In the “Part 2: Organization Information” section, type the required information in the fields marked with an asterisk.

Note: Please follow these guidelines when completing the “Organization Name” field. If you’re a:

- **Contractor**, type the name of your employing company.
- **Volunteer, Student Services Contractor, ORISE Intern** or not affiliated with a company/organization, type your personal name.
- **Grantee** or with the **Senior Environmental Employment (SEE) Program**, type the name of the organization for which you work.

Click the Submit Request for Access button.
1.7 A “Confirmation” page appears.

1.8 Retrieve your CDX registration from your email. Click the link provided.

1.9 At the Central Data Exchange log-in screen, complete the registration process by typing your User ID and Password. Click the Log in to CDX button.

1.10 At the “Central Data Exchange” page, on the “My CDX” tab, click the EPA Internet On Boarding Application link. iBoard instructions continue at “Section 2: Submitting Non-EPA Personnel Information.”
Section 2: Submitting Non-EPA Personnel Information Using iBoard

Personnel information can be added directly through iBoard (following instructions below).

Data can be submitted for individuals or groups of 15 or fewer. If your contract includes more than 15 individuals and you are the POC submitting everyone’s information, simply make multiple group submissions. (Note: The iBoard application shuts down after 20 minutes of inactivity. If a process is not complete when the application shuts down, information is lost and must be added again.)

If you have questions, refer to contact information in the “Introduction.”

2.1 Upon logging in to CDX and clicking the iBoard link, the “iBoard Home Page” appears. Click the Click Here to Begin Submission link (or the “Contracts/Grants” tab at the top of the page).
2.2 At the “Contract/Grant Submission” page, in the “Contract/Grant Information” and “Alternate Organization POC” sections, complete the fields marked with an asterisk (*).

Notes: For help completing this information, please refer to the chart below.

If you don’t know someone’s email address, refer to Steps 2.3 and 2.4.

Please note: The COR role may be fulfilled by a Project Officer (PO) or EPA Point of Contact (POC), depending on your personnel type.

CO = Contracting Officer
AO = Awarding Official
COR = Contracting Officer’s Representative

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**Contract/Grant Submission**

The information below is from your CDX Registration and will be passed on to EPA with your submission. If this information is incorrect, please update your CDX Registration information prior to starting your submission. These details can only be updated within the MCDD task on the left-hand side of this screen or by the CDX Help Desk. Please visit the FAQ section for more information on making these updates.

- **First Name:**
- **Last Name:**
- **CDX UserId:**
- **Organization Name:**
- **Email Address:**
- **Phone Number:**
- **Extension:**

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**Contract/Grant Information**

The information below is required for each submission. These details can be found on your EPA Contract/Grant Award Letter.

- **Contract/Grant Number:**
- **Re-Enter Contract/Grant Number:**
- **EPA Contracting Officer (CO) / Award Official (AO) Email:** Find
- **EPA Contracting Officer’s Rep (COR) Email:** Find
- **Alternate EPA COR Email:** Find

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**Alternate Organization POC**

Please provide an email address in the field below to have a second person at your company receive email notifications from EPA regarding your submission(s).

- **Alternate Organization POC Email:**
- **Re-Enter Alternate Organization POC Email:**

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<table>
<thead>
<tr>
<th>Personnel Type</th>
<th>What to use for Contract / Grant Number</th>
<th>CO / AO Information</th>
<th>COR / POC Information</th>
<th>“Alternate COR” Information</th>
<th>What to use for “Alt POC”</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPA Contractor</td>
<td>EPA contract number</td>
<td>EPA person in Contracts</td>
<td>The EPA federal supervisor</td>
<td>Could also be the EPA federal supervisor</td>
<td>Name of contracting company supervisor</td>
</tr>
<tr>
<td>Student Services Contractor</td>
<td>EPA contract number</td>
<td>EPA person in Contracts</td>
<td>Your EPA federal supervisor</td>
<td>Could also be your EPA federal supervisor</td>
<td>Your name</td>
</tr>
<tr>
<td>Non-EPA Contractor</td>
<td>Contract number</td>
<td>The EPA federal contact</td>
<td>The EPA federal employee contact</td>
<td>The EPA federal employee contact</td>
<td>Name of COTR of non-EPA agency</td>
</tr>
<tr>
<td>Volunteer (other than Grants)</td>
<td>Your name</td>
<td>Your EPA monitor</td>
<td>Your EPA monitor</td>
<td>Your EPA monitor</td>
<td>Your name</td>
</tr>
<tr>
<td>SEE Program Member</td>
<td>Cooperative Agreement Number</td>
<td>Angela Hughes</td>
<td>Roxann Elmore</td>
<td>Angela Hughes</td>
<td>Your organization contact</td>
</tr>
<tr>
<td>Grants/ORISE Internship Program</td>
<td>Agreement number</td>
<td>EPA Program Office federal contact</td>
<td>Your EPA federal supervisor</td>
<td>EPA Program Office contact</td>
<td>Your agency/organization contact</td>
</tr>
<tr>
<td>Non-EPA Federal Employee</td>
<td>Your Name</td>
<td>Your EPA Point of Contact</td>
<td>Your EPA Point of Contact</td>
<td>Your EPA Point of Contact</td>
<td>Your Agency Point of Contact</td>
</tr>
</tbody>
</table>
2.3 If you don’t know someone’s email address, click Find.

2.4 The “Find EPA Employee” dialog box appears.
   - Type the person’s last name and first name.
   - Click Find.
   - Upon locating the email address, click Select to populate the field and return to the “Contract/Grant Submission” page.

2.5 When all of the required fields on the “Contract/Grant Submission” page are complete, click the Continue button.

Error messages appear on the screen if data does not pass the built-in validation. Simply correct the information and click Continue.

Alternate POCs will receive copies of the email notifications. (Note: Before an organization’s Alternate POC can submit information to iBoard, he/she must first complete CDX registration procedures.)
2.6 A pop-up message appears.

- Submit personnel information “manually” (via iBoard web form) because it is the most secure way to submit information.

Manual submissions can be made for individuals or for groups of 15 or fewer. If your contract includes more than 15 individuals and you are the POC submitting everyone’s information, simply make multiple group submissions.

Click **Enter Non-Federal Employee Information Manually**.

2.7 a. An iBoard web form appears. Complete the form with an individual’s information. All fields with an asterisk (*) are required.

Error messages appear if data is not valid.

**Notes**

- **Enter the individual’s personal email address.** Do NOT use a work email address or any other address to which recipients other than the individual would have access. EPA could be sending personal/sensitive information or requests via email that we do not want to share with unauthorized persons.
- “Birth State” is required if the “Birth Country” is the United States.
- If you don’t know how to complete the “EPA Program Office,” “IT Access,” “Physical...
Access,” or “Firearm Required” fields, contact your EPA federal supervisor.

When all required fields are complete, click Add.

**Note:** If you click “Back,” you will lose all the information you just completed. That’s why a warning pop-up box appears. The “Back” button takes you to the blank “Contract/Grant Submission” page shown in step 2.2. You will have to re-enter contract information and personal information.

**NOTE:** If you notice an error in the information you have typed, it might be best to continue forward and click the “Edit” button later. That way you can correct the error without having to retype all the information.

2.8

- If you are submitting only your personal information, your name should appear in the “Contract/Grant Submission” table, as shown. Click Review.

- If you are submitting information for more than one person, the name of the individual whose information you just added should appear as shown.
  - To add more individuals to the contract/grant, click the Click Here link. A new web form appears.
  - If no more information is to be added, click Review.
Notes: If changes are necessary, click the “Edit” button. Make changes to the web form, click “Update,” and then click the “Back” button on that page.

If a person’s information is added erroneously, click “Remove” to delete the entry from the table. A pop-up warning appears; click OK to confirm the deletion.
2.9 The “Review Contract/Grant Manual Submission” page appears.

Scroll down the page to carefully review the information submitted.

- If changes are needed, click “Back.” Then click the appropriate “Edit” button to make the necessary changes.
- If information is accurate, click **Submit**.

| First Name: | Linda |
| Last Name:  | Lande |
| CDX UserID: | UND0LANCE |
| Organization Name: | XYZ |
| Email Address: | lande.linda@epa.gov |
| Phone Number: | 2025646654 |

| Contract/Grant Number: | 4503 |
| Contracting Officer (CO)/ Award Official (AO) Email: | nns.jim@epa.gov |
| Contracting Officer’s Rep (COR) Email: | johnson.lee@epa.gov |
| Alternate COR Email: | lande.linda@epa.gov |

| Alternate Organization POC Email: | brodie.jeremy@epa.gov |

<table>
<thead>
<tr>
<th>Non-Federal Employee Information (2 Non-Federal Employees)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN: *<strong>-</strong>-5555</td>
</tr>
<tr>
<td>First Name: John</td>
</tr>
<tr>
<td>Last Name: Smith</td>
</tr>
<tr>
<td>Middle Initial: O</td>
</tr>
<tr>
<td>Suffix:</td>
</tr>
<tr>
<td>Position: Trainer</td>
</tr>
<tr>
<td>Email Address: <a href="mailto:smith.john@epa.gov">smith.john@epa.gov</a></td>
</tr>
<tr>
<td>Program Office: OFFICE OF ADMINISTRATION RESOURCES MANAGEMENT</td>
</tr>
<tr>
<td>Work City and State: WASHINGTON - DC</td>
</tr>
<tr>
<td>Birth Date: 03/11/1958</td>
</tr>
<tr>
<td>Birth City: Burlington</td>
</tr>
<tr>
<td>Birth Country: UNITED STATES</td>
</tr>
<tr>
<td>Birth State: MARYLAND</td>
</tr>
<tr>
<td>Citizenship: US CITIZEN BY BIRTH</td>
</tr>
<tr>
<td>IT Access: YES</td>
</tr>
<tr>
<td>Physical Access: YES</td>
</tr>
<tr>
<td>Firearm Required: NO</td>
</tr>
</tbody>
</table>
2.10 A pop-up message appears. Click **OK** to save and submit the data, which now can be reviewed by your EPA Contracting Officer’s Representative (COR)/Program Officer (PO).

2.11 If you are submitting more than one record (a group submission), a History page appears. All submissions are tracked on the History page. (Refresh the browser to receive an updated status.)

Clicking the details link (far right column) provides information about a particular submission.

**Status Notations**

- “Processing” indicates the submission is in process; status will change to “Pending” when data is sent from CDX to the Personnel Security System (PSS).
- “Pending” indicates the submission is pending validation. Status will change to either “Completed” or “Failed” based on PSS validations.
- “Completed” indicates the submission successfully reached the EPA Personnel Security System.
- “Failed” indicates the submission contained errors or that the data delivery to PSS failed. Click the details link.