Navigating the Create a Report Workflow

This job-aide guides you through the report creation process from the MyCEDRI Dashboard. From the MyCEDRI dashboard click the 'Create a Report' button to start a new report (Exhibit 1).

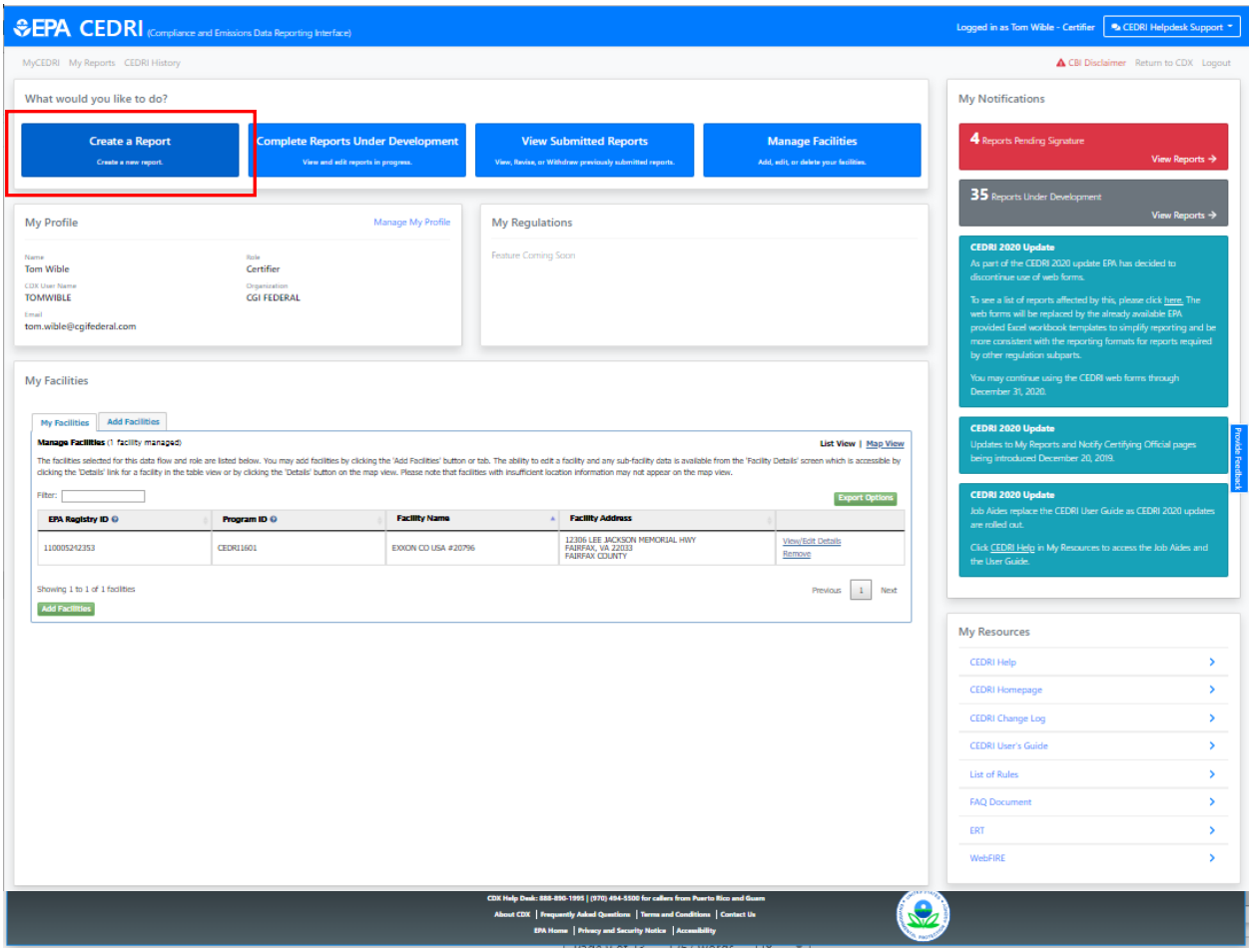

Exhibit 1

The first step in the Create Report workflow is selecting the type of report you are submitting by clicking the applicable report type in the 'Select Report Type' window (Exhibit 2).

CEDRI has two reporting workflows:

1. Electronic Report Tool (ERT) workflow used to submit 'Performance Test / Evaluation Reports'
2. Non-ERT workflow used to submit "Notification Reports', 'Periodic Reports', and 'State/Local/Tribal Rule or Permit' reports.

Both workflows begin with the same Step 1: Select Report Type (Exhibit 2). Depending on the Report Type selected the applicable workflow is initiated.

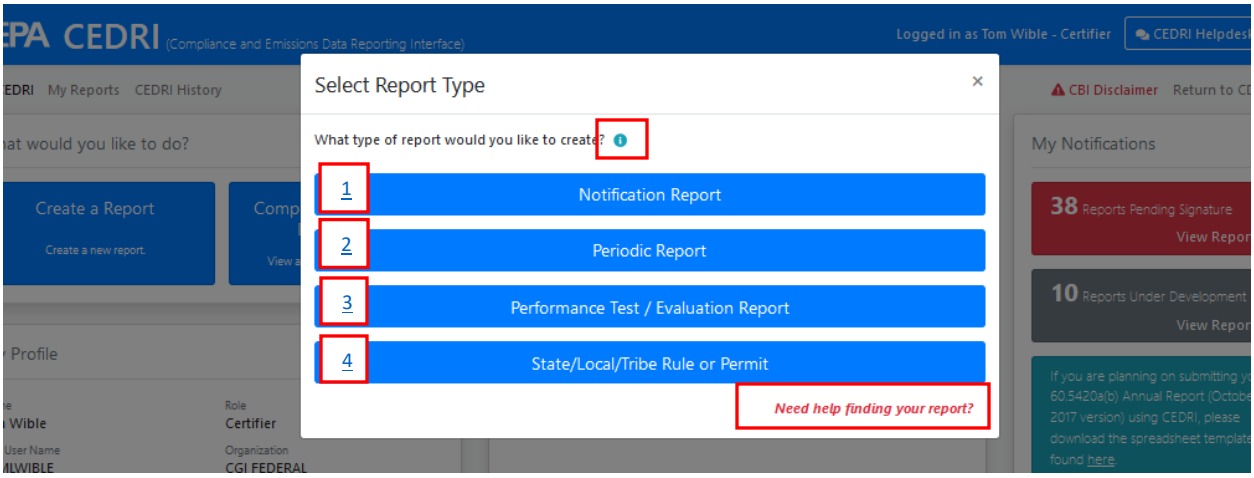

Exhibit 2

1. Notification Report
2. Periodic Report
3. Performance Test / Evaluation Report
4. State/Local/Tribal Rule or Permit

If you are unsure of which Report Type to select, click the Help icon (ℹ) to view 'Report Type Examples' or click the "*Need help finding your report?*" to view a downloadable list of reports you may submit using CEDRI. Reports are organized by regulation part, sub-part, sector and source category.

Non-ERT Reporting Workflow

Selecting 'Notification Report', 'Periodic Report', or 'State/Local/Tribal Rule or Permit' (Exhibit 2), takes you to the second step of the Create Report workflow (Exhibit 3) where you may select one or more reports to submit.

Note: There are three sub-steps to selecting reports:

1. Enter search criteria to locate the report(s) to be submitted (Exhibit 3).
2. Search for Reports you wish to submit (Exhibit 4).
3. Add report(s) from the 'Search Results' to your 'Selected Reports' list (Exhibit 5).

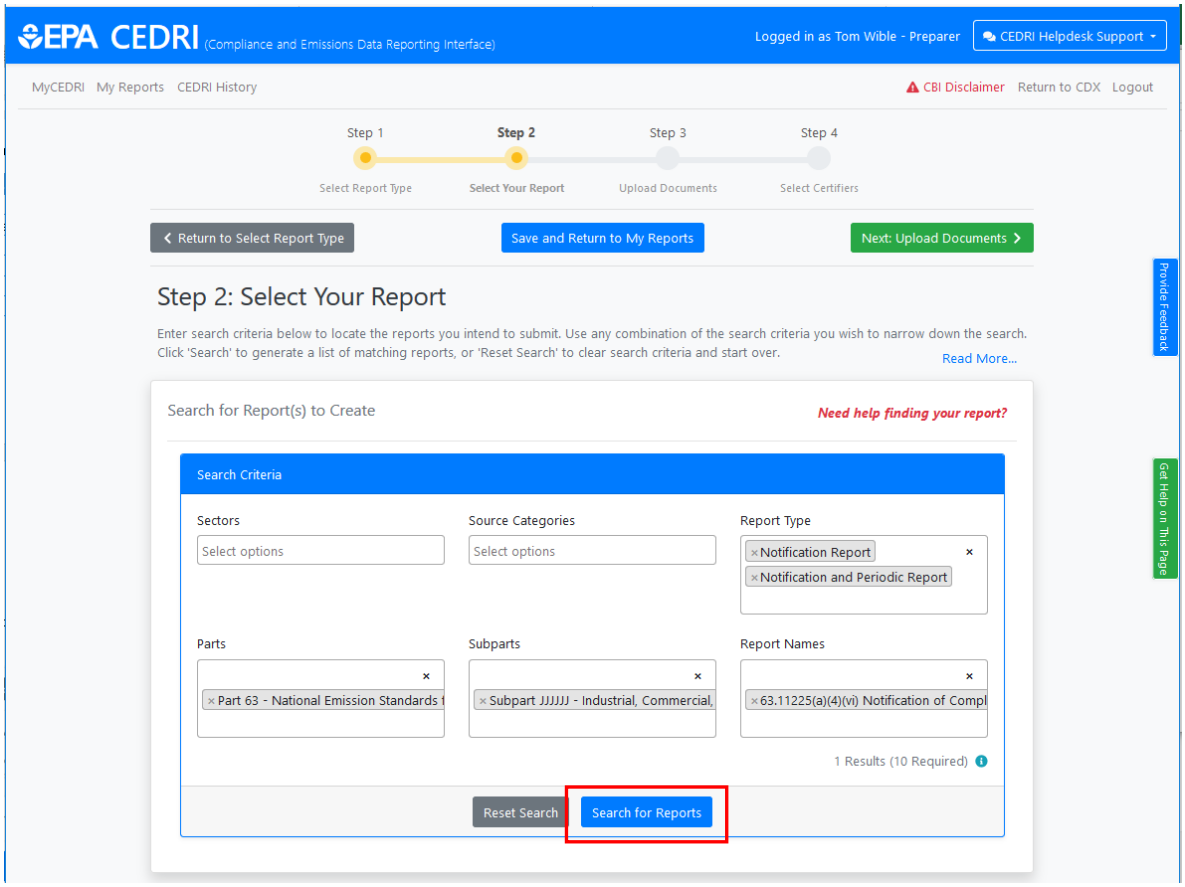

Exhibit 3

The following search criteria is available to locate the reports you intend to submit to EPA:

Criteria	Description
Sectors	Industry sector in which your facility operates
Source Categories	Industry group classification for facilities emitting toxic air pollutants
Report Type	Automatically populated based on Report Type selection.
Parts	40 CFR Regulation Part
Subparts	40 CFR Regulation Subparts
Report Names	Citation reference from applicable 40 CFR Part/Subpart

After entering your search criteria, click 'Search for Reports' (Exhibit 3) to display selected reports in the 'Search Results' table (Exhibit 4).

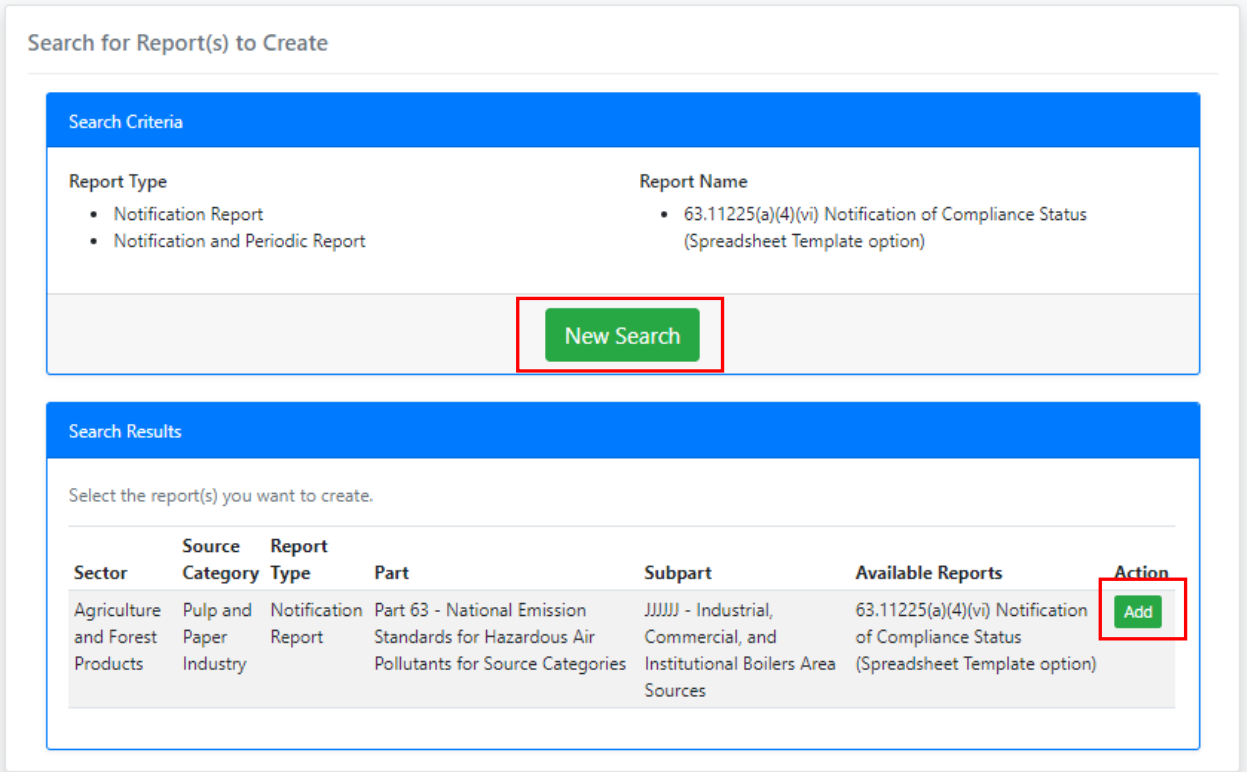

Exhibit 4

If your report is not listed in the search results, click 'New Search' (Exhibit 4) to clear the search criteria so you may enter new criteria. If the report(s) you intend to submit are found in the list click the 'Add' button next to the report to add the selected report to the 'Selected Reports Table' (Exhibit 5).

Continue searching as described above to add additional reports to the 'Selected Report(s)' table. Once all reports are in the 'Selected Reports' table you may proceed to the next step of the Create Report workflow.

Note: All reports in the 'Selected Reports' table are included in the Create Report workflow. Use the 'Delete' button to remove any reports you do not intend to submit to EPA (Exhibit 5).

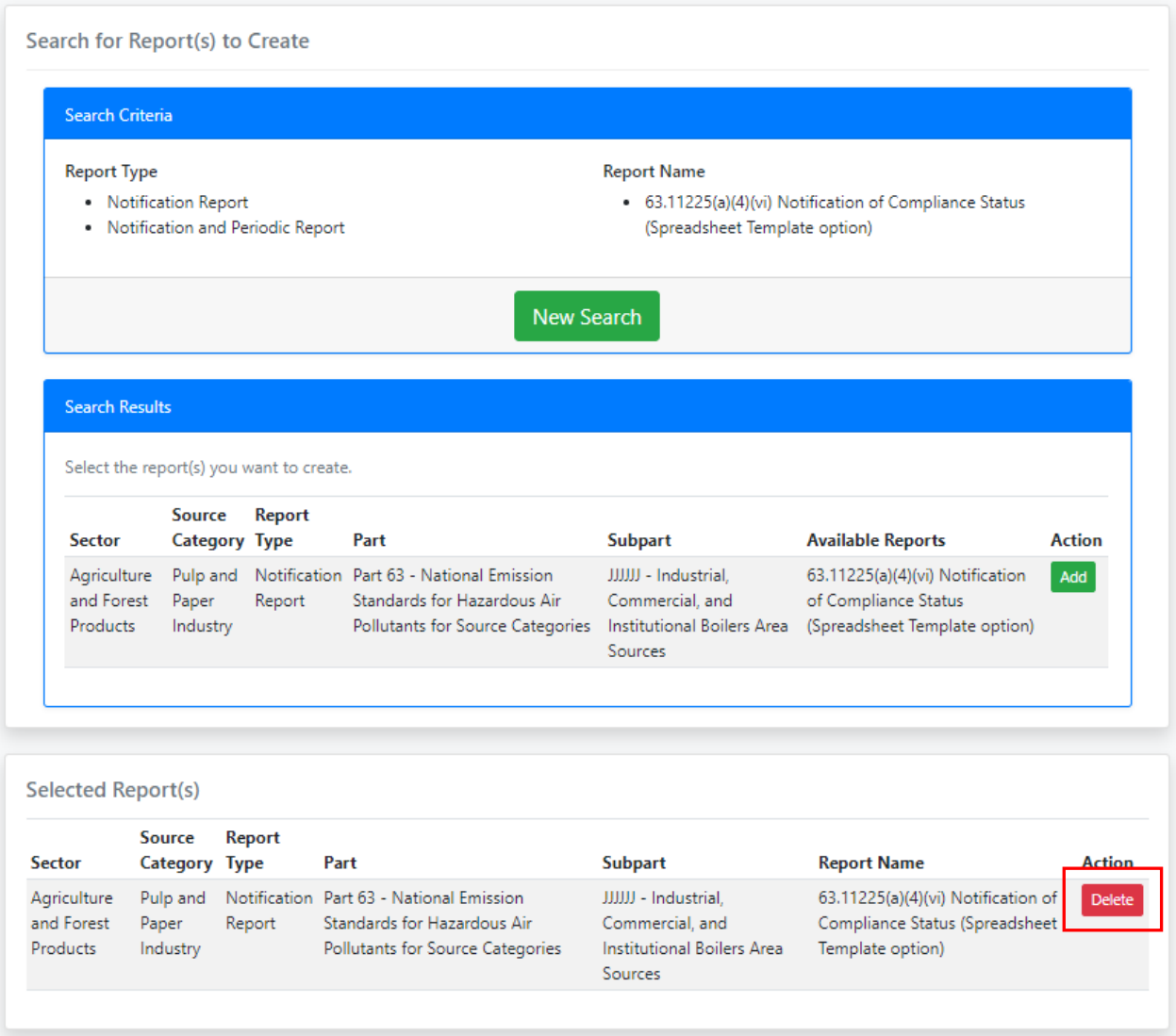

Exhibit 5

To continue the Create Report workflow, scroll back to the top of the page and click the 'Next: Upload Documents' button to proceed to the next step (Exhibit 6).

The 'Save and Return to My Reports' button (Exhibit 6) takes you back to the My Reports page. The report(s) are saved in the 'My Reports' dashboard. To find more information about this process, refer to the My Reports Job Aide.

You may also return to My Reports by clicking the 'Return to My Reports' button on the menu bar (Exhibit 6).

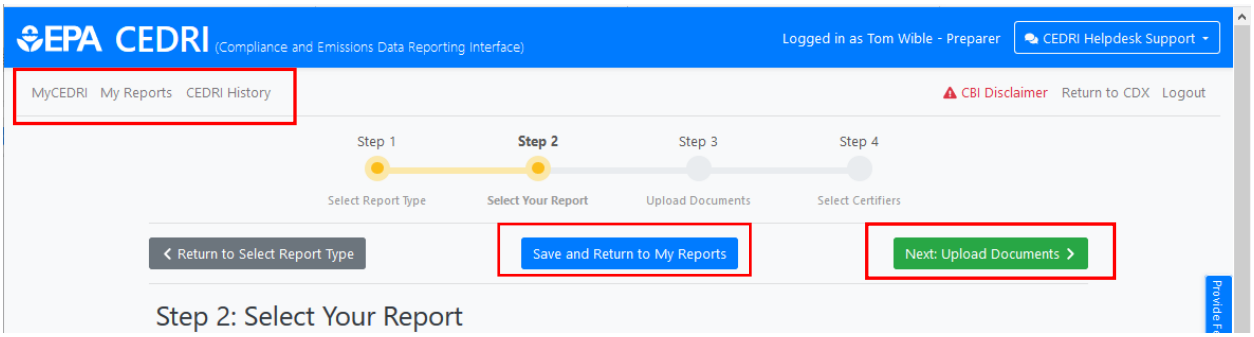

Exhibit 6

In Step 3, you may view the report information and download a spreadsheet report template/XML Schema by clicking either the 'Click Here to Download Report Template' or 'Click Here to Download XML Schema' links (Exhibit 7). You can also view Paperwork Reduction Act (PRA) information as it pertains to the report (Exhibit 7).

- In order to upload your file, click the 'Browse' button in the Upload section of the page to locate your file (Exhibit 7). Once you have located the appropriate file, click the 'Upload' button to add your file to the report.
- If you need to save the report, select 'Save and Return to My Reports', so that the report saves in 'My Reports'.
- All acceptable file formats for the report are shown at the bottom of the Upload section.

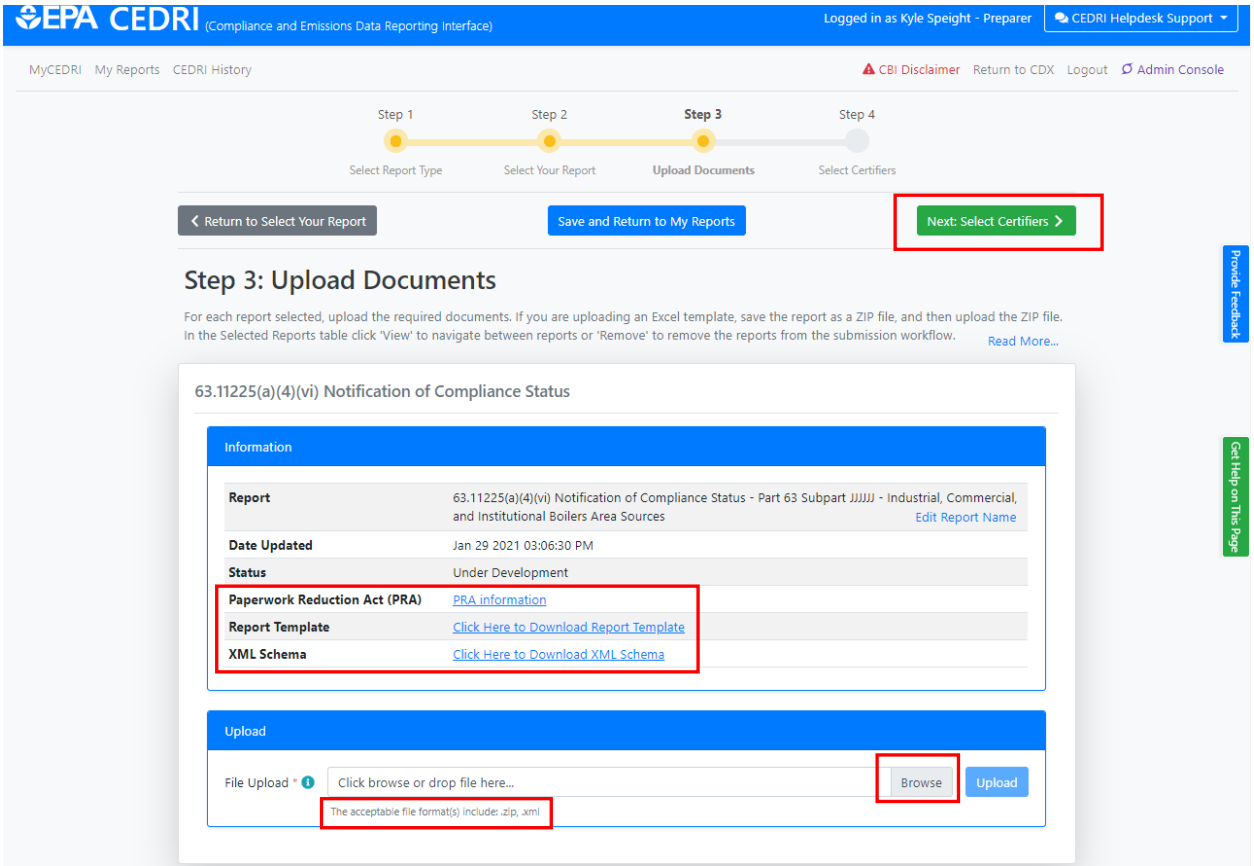

Exhibit 7

After uploading the file, if you are logged in as a Preparer, click the 'Next: Select Certifiers' button (Exhibit 7) or if you logged in as a Certifier click 'Next: Sign and Submit' from Step 3 (Exhibit 8).

To view the uploaded file, click the file name (Exhibit 8).

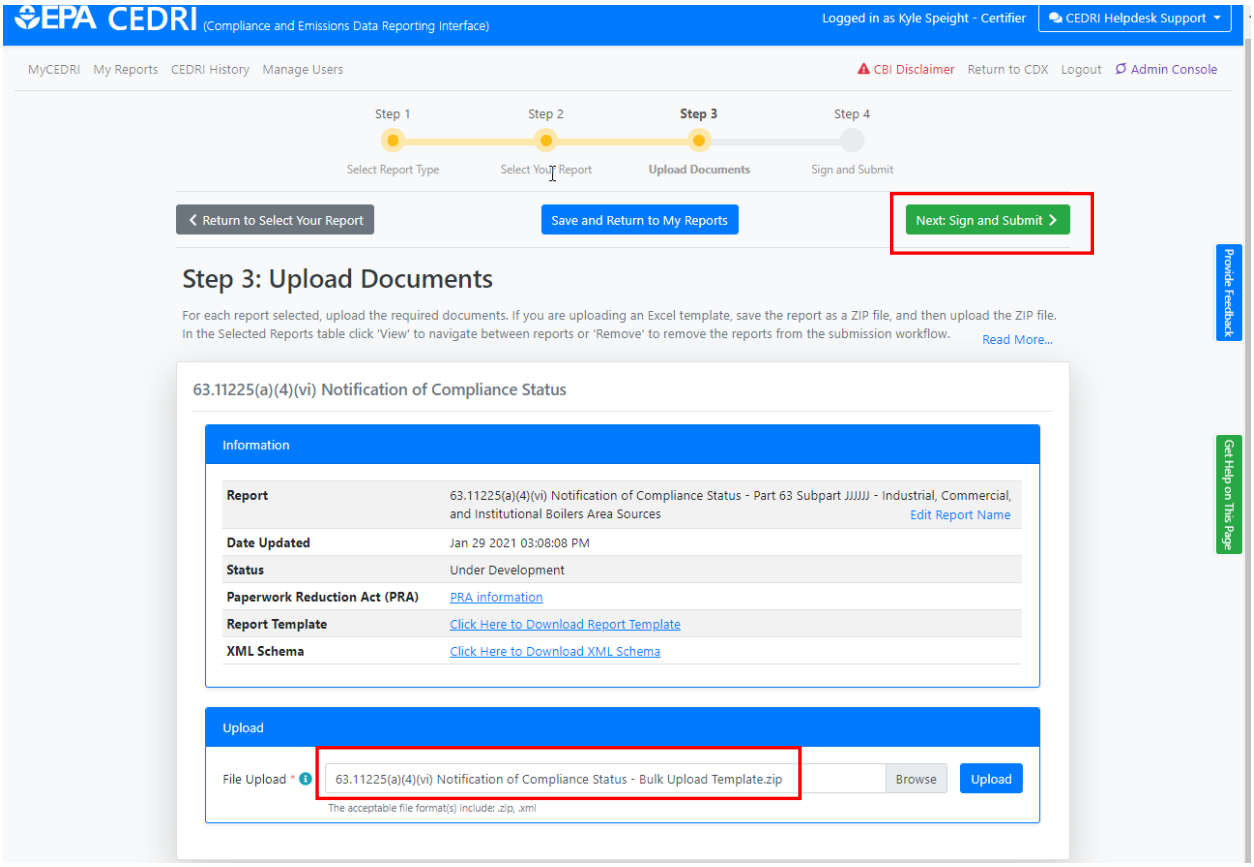

Exhibit 8

Note: For both workflows (ERT or non-ERT) Step 4 is the same process for all reports types.

Selecting 'Next: Notify Certifier' or 'Next: Sign and Submit' takes you to Step 4 of the workflow where you:

1. Specify the facility submitting the report.
2. Allow access to other Preparers for the facility.
3. Notify Certifiers for the facility the reports are ready to submit.
4. Review the report(s) being submitted.

This step is explained for both workflows in Workflow Step 4 - Reviewing and Submitting Reports.

ERT Report Workflow

Selecting 'Performance Test / Evaluation Report' Report Type (Exhibit 2), you are taken to the 'Upload Documents' page (Exhibit 9). This is where you can upload an Electronic Reporting Tool (ERT) file, view the report Information, and access the EPA ERT web site.

By clicking on the 'EPA's ERT Website' link in the 'Step 2; Upload Documents' instructions section, you are taken to the Electronic Reporting Tool (ERT) web site.

- In order to upload your ERT file, click the 'Browse' button (Exhibit 9) in the Upload section of the page. Once you have located the appropriate file, click the 'Upload' button to add your file to the report.
- If you need to save the report, select 'Save and Return to My Reports' (Exhibit 9) . Your report is saved in My Reports. For more information refer to the My Reports Job Aide.
- After uploading the ERT file click 'Next: Select Your Reports' (Exhibit 10).

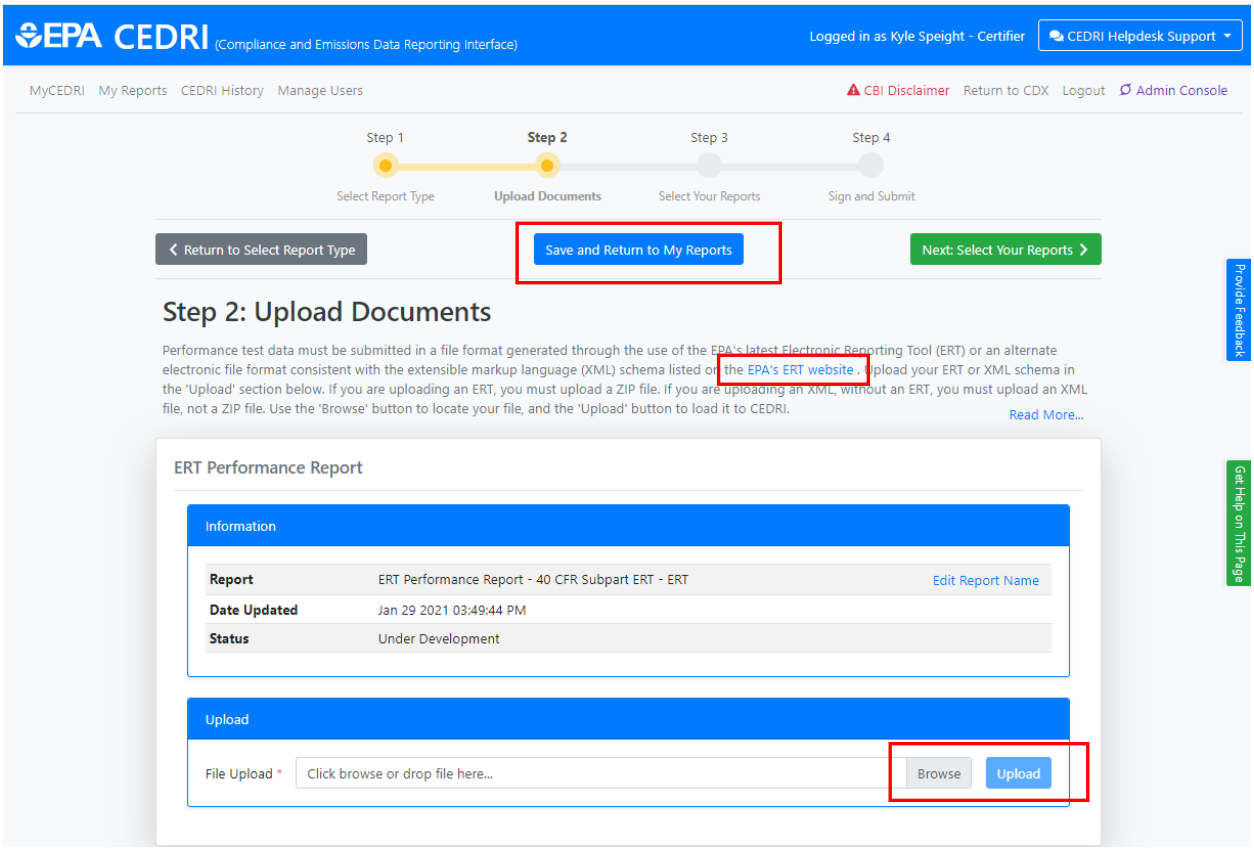

Exhibit 9

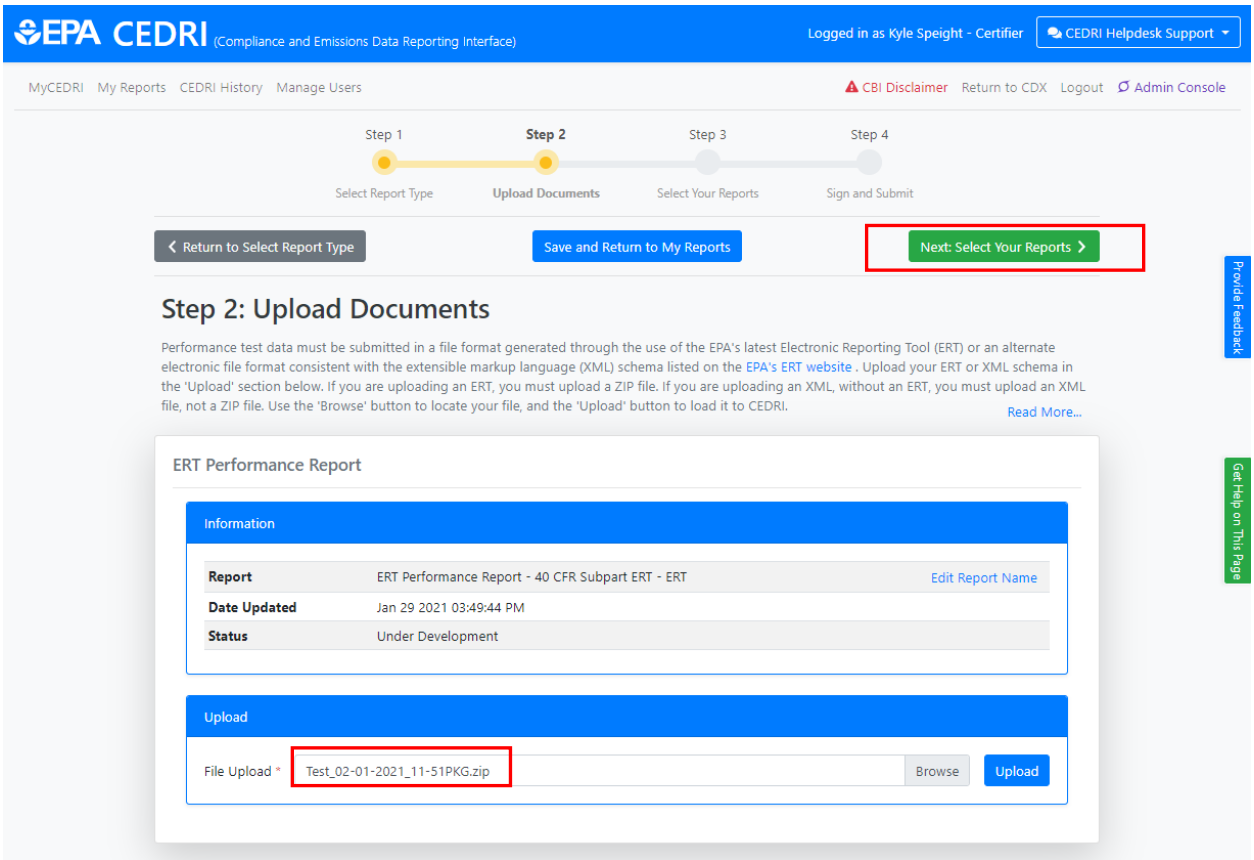

Exhibit 10

Click the 'Next: Select Your Reports' button (Exhibit 10), and you are taken to the 'Select your Reports' page (Exhibit 11). To specify the reports satisfied by the ERT file you must first search for the reports using the 'Sectors', 'Source Categories', 'Parts', 'Subparts' and/or 'Report Names' search criteria. Not all criteria are required, but enough criteria must be specified to limit search results to no more than 10 reports.

- Search criteria may be cleared by clicking 'Reset Search' (Exhibit 11).
- After selecting desired fields, click 'Search for Reports' (Exhibit 11) to select the report(s) satisfied by your submission.

Note: A single ERT file may satisfy multiple reporting requirements. Select all reports that correspond to the 40 CFR reporting requirement being satisfied by the ERT. Click "*Need help finding your report?*" to view / download a list of 40 CFR reporting requirements supported by CEDRI.

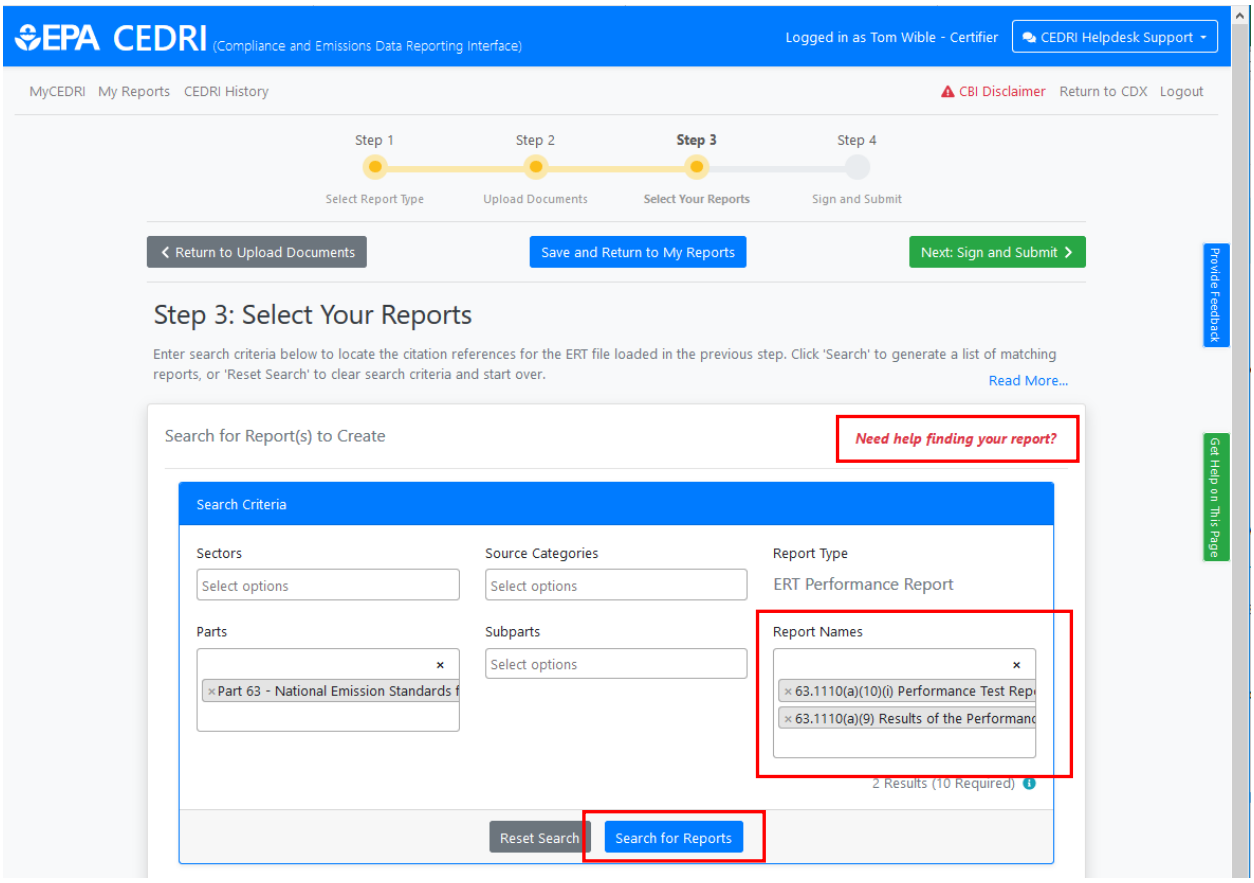

Exhibit 11

Reports satisfying your search criteria are displayed in the Search Results section of the page (Exhibit 12). Click the 'New Search' button if the reports you are looking for are not listed.

Select all applicable reporting requirements and click then 'Add' in the Action column. This adds the reporting requirement to the Selected Part(s) and Subpart(s) section of the page. These reports are added to your submission as the reporting requirements satisfied by the ERT file previously uploaded.

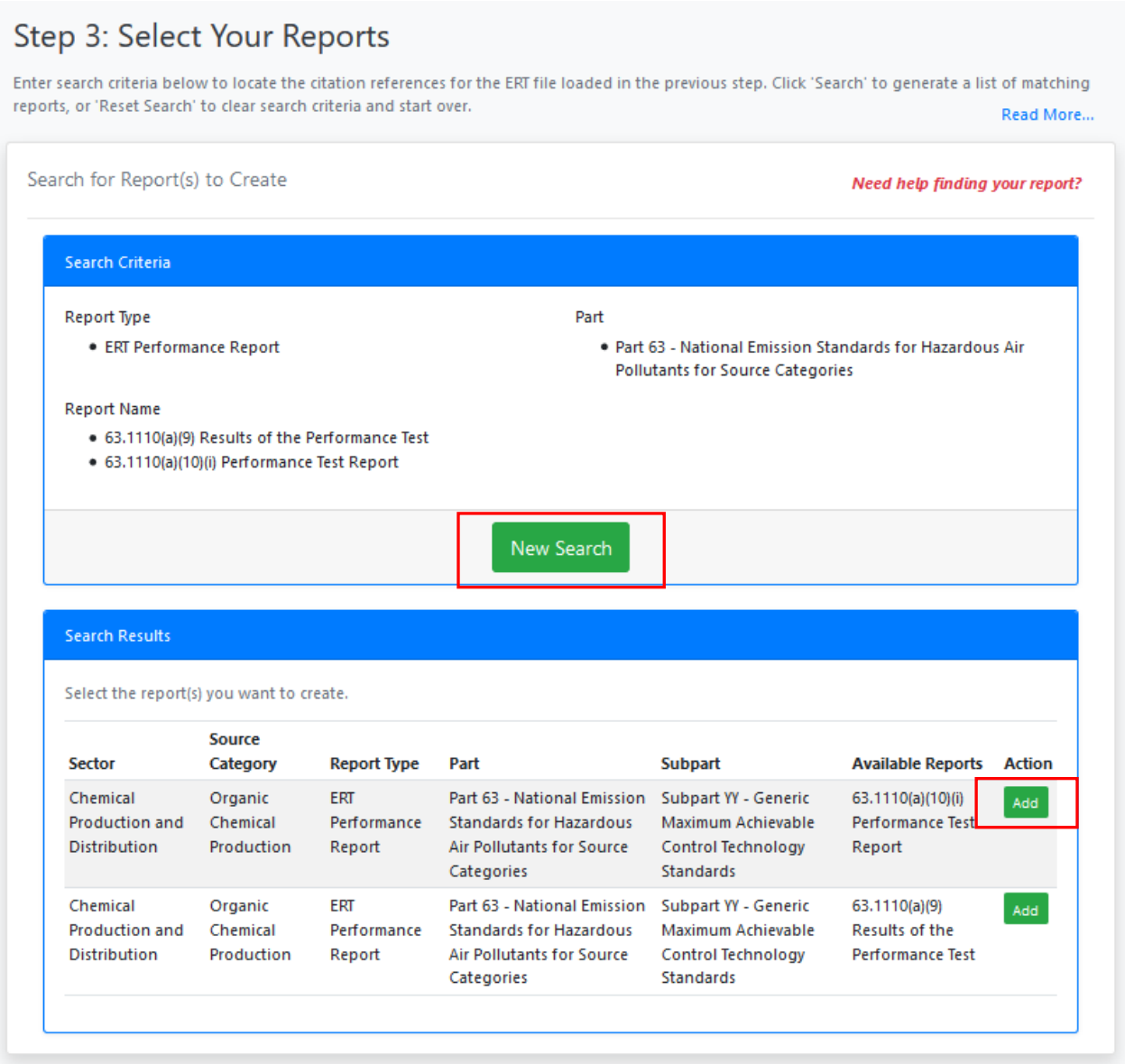

Exhibit 12

If you need to delete any of the reports, click the 'Delete' button under the Action column (Exhibit 13).

Once you are satisfied with the reports selected click 'Next: Notify Certifier' button if you are logged in as a Preparer or click 'Next: Sign and Submit' button if you are logged in as a Certifier.

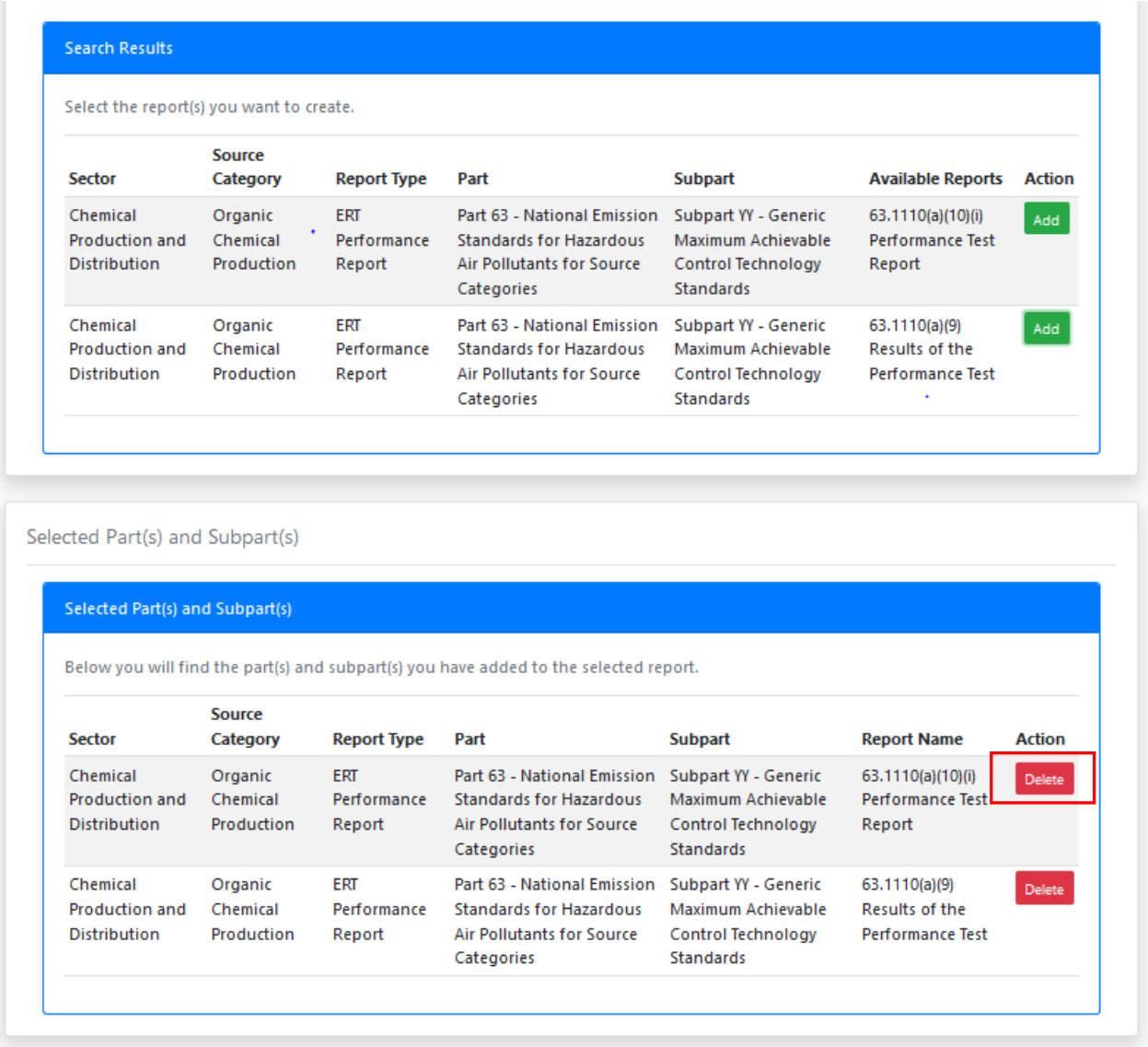

Exhibit 13

Note: For both workflows (ERT or non-ERT) Step 4 is the same process for all report types.

Selecting 'Next: Notify Certifier' or 'Next: Sign and Submit' takes you to Step 4 of the workflow where you:

1. Specify the facility submitting the report.
2. Allow access to other Preparers for the facility.
3. Notify Certifiers for the facility the reports are ready to submit.
4. Review the report(s) being submitted.

This step is explained for both workflows in Workflow Step 4 - Reviewing and Submitting Reports.

Workflow Step 4 - Reviewing and Submitting Reports

The final step of the reporting workflow differs slightly by role. Instructions for completing the final step are presented each time this step of the workflow is entered (Exhibit 14). Click 'OK' to proceed with Step 4.

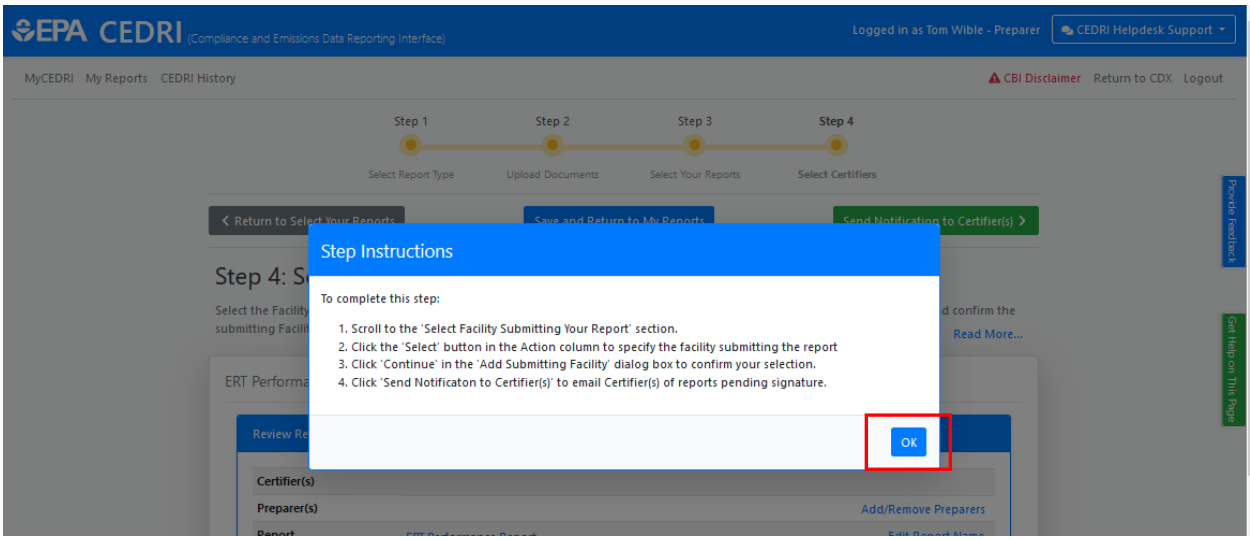

Exhibit 14

Both roles must first specify the facility submitting the report so that Certifiers and if necessary, additional Preparers, may be given access to the report(s).

Once the facility submitting the report(s) is specified the available actions differ by role:

Role	Available Actions
Preparer	Add/Remove Preparers Edit Report Name Download File for Review (or view web form) Send email to Certifiers
Certifier or Delegated Certifier	Add/Remove Preparers Edit Report Name Download File for Review (or view web form) Sign and Submit Report(s)

Select Facility Submitting Your Report

Since multiple reports may be included in a submission, and multiple facilities may be included in each report, the facility submitting the report(s) must be identified. This allows CEDRI and CDX to provide access control to users associated with the specified facility.

To specify the facility, in the 'Select Facility Submitting Your Report' section, click the 'Select' button next to the Facility Address to specify the facility (Exhibit 15). Only one facility may be selected. To change your selection click the 'Select' button for a different facility. If only one facility is listed, you may not de-select the facility.

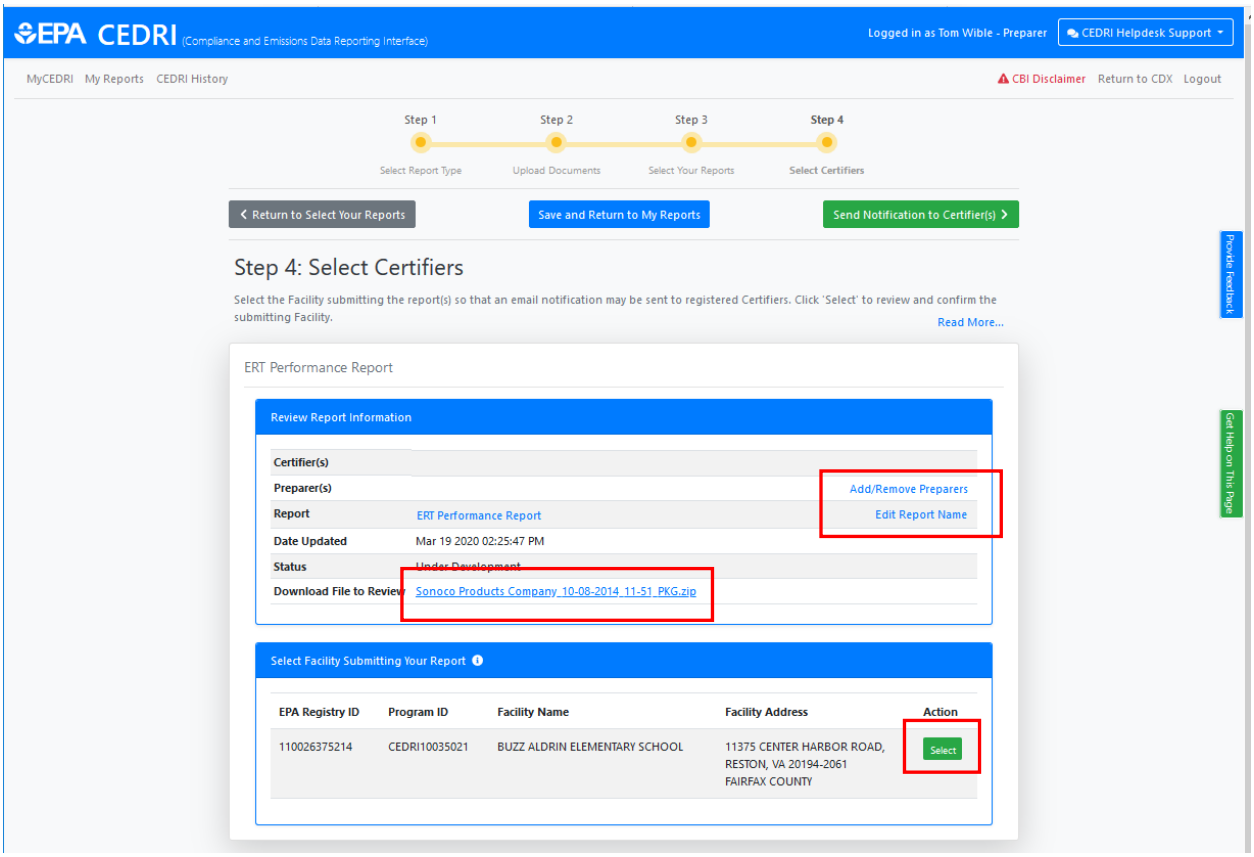

Exhibit 15

The selected facility information displays for your confirmation (Exhibit 16). Click 'Continue' to accept and continue with notifying Certifiers or signing and submitting the report(s).

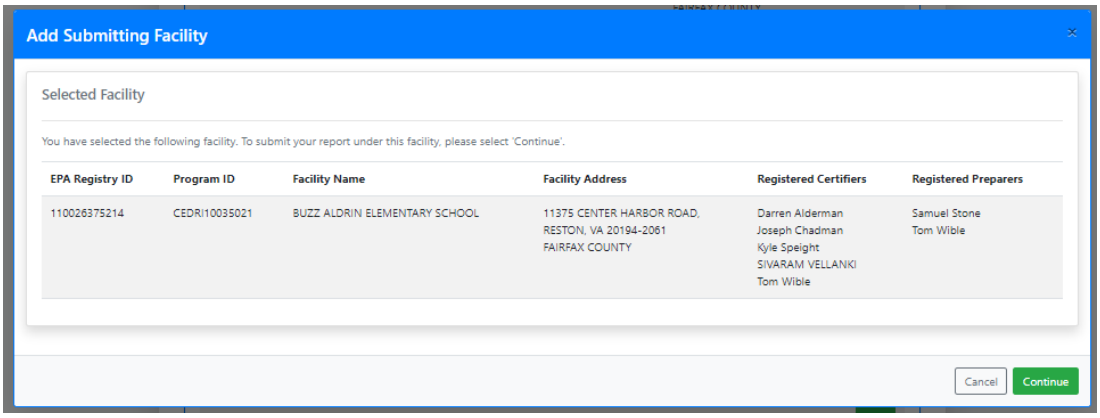

Exhibit 16

All Preparers, Certifiers, and Delegated Certifiers with the selected facility in their CDX user profile are displayed for selection to either grant access to the report (Preparers), or to receive an email indicating a report is ready to be signed and submitted (Certifiers and Delegated Certifiers) (Exhibit 17). See Managing Facilities Job Aide to associate facilities to your CEDRI account.

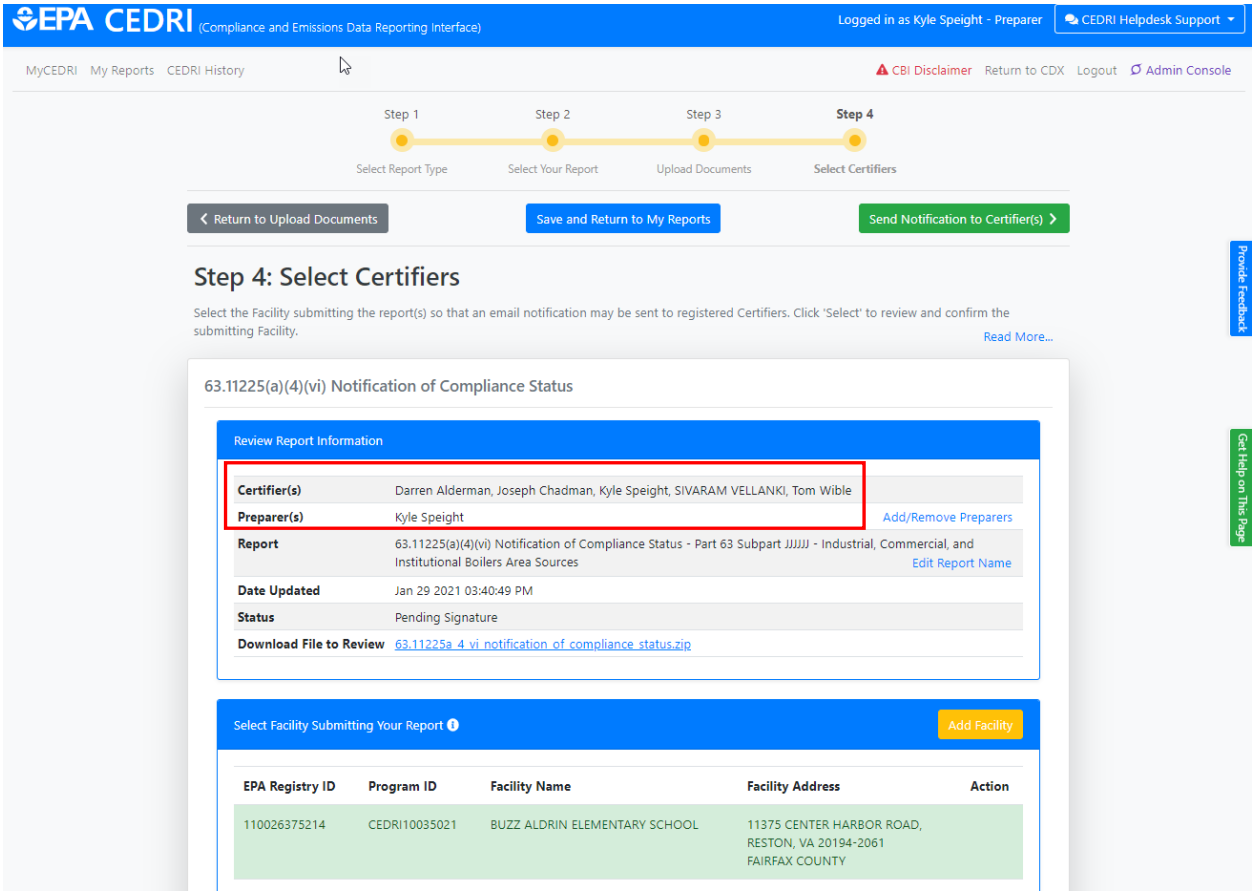

Exhibit 17

Add/Remove Preparers

Other Preparers associated with the selected facility may be granted access to the report by either the Preparer creating the report, or Certifiers associated with the facility. Clicking 'Add/Remove Preparers' opens the Add/Remove Preparers dialog where you may select or deselect Preparers who may view the report (Exhibit 18).

Note: If Preparers are not added during this step, no other Preparers besides the one who created the report, can access the report in the future.

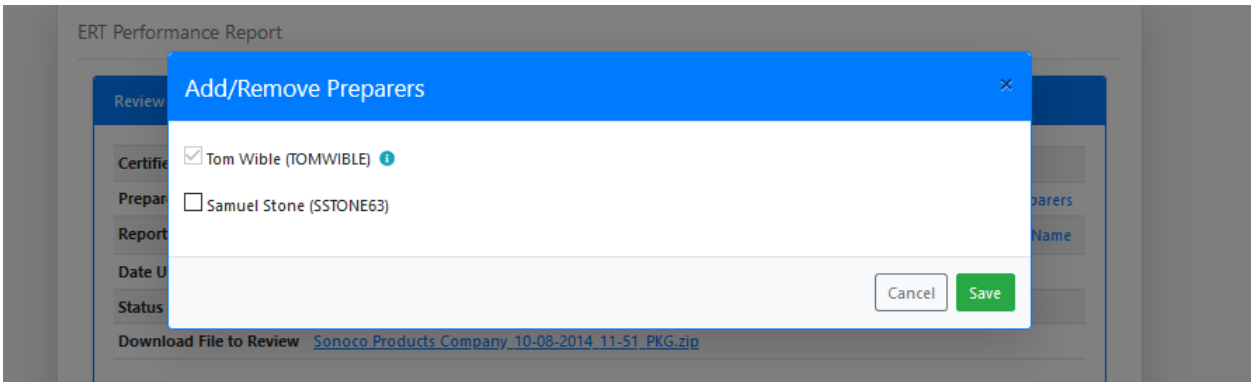

Exhibit 18

Send Notification to Certifiers

With the facility selection confirmed, click the 'Send Notification to Certifiers' button to send an email to Certifiers (and Delegated Certifiers) that need to be informed that report(s) are awaiting their signature (Exhibit 19).

If the Certifier for your facility is not listed you may enter their email address so they receive an email with instructions to create a CDX account, register for CEDRI, and sign and submit the report.

If you are logged in as a Certifier or Delegated Certifier you will not have the option of notifying Certifiers.

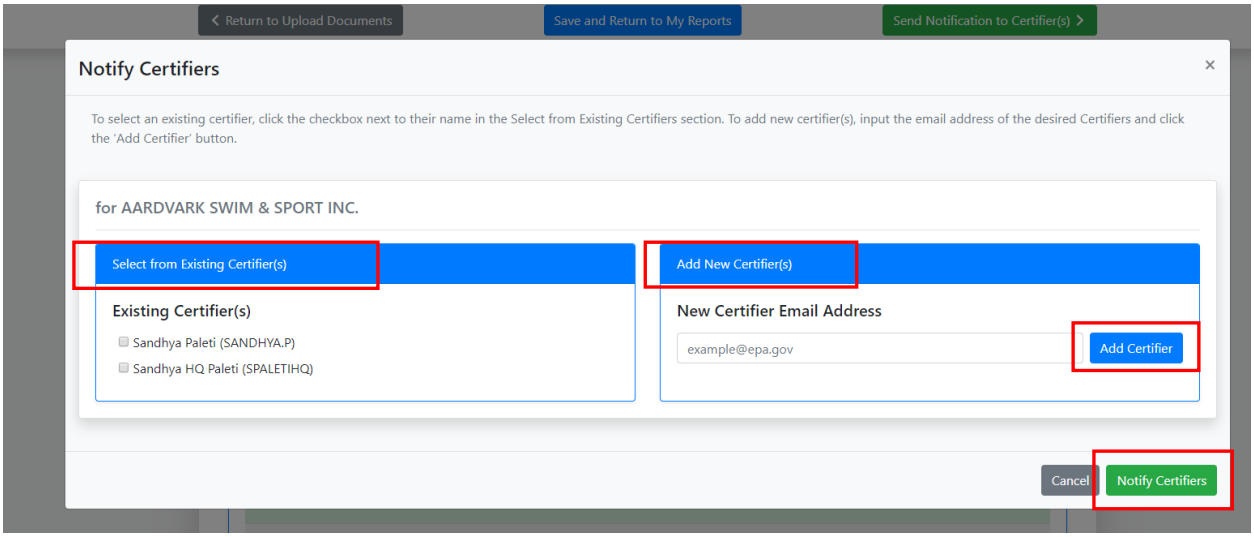

Exhibit 19

After you click 'Notify Certifiers' button (Exhibit 19), a 'Success' message displays notifying you that the selected Certifiers have been added to the report (Exhibit 20).

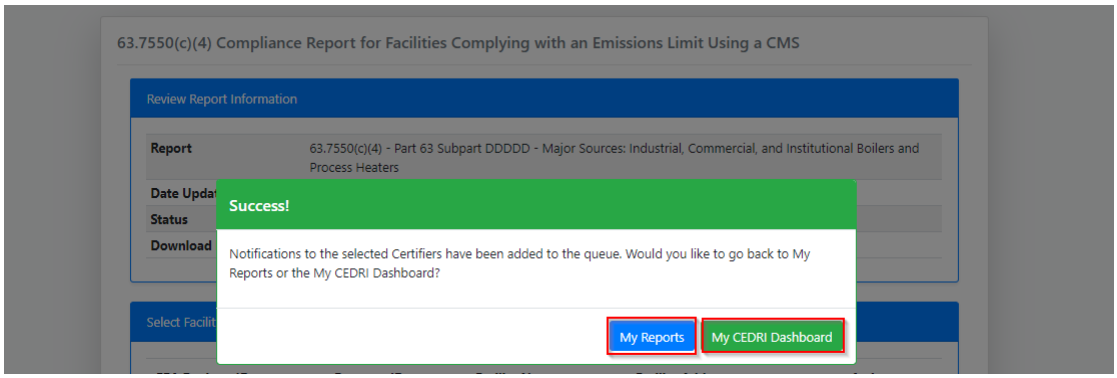

Exhibit 20

Sign and Submit Reports

Once a facility has been specified, a Certifier from the facility may submit the reports to EPA by clicking the 'Sign and Submit All Report(s)' button (Exhibit 21). CEDRI displays a confirmation message, asking you to verify that all information contained in your submission is accurate (Exhibit 22). After reading the message, click 'I confirm' to continue to the eSignature signing process.

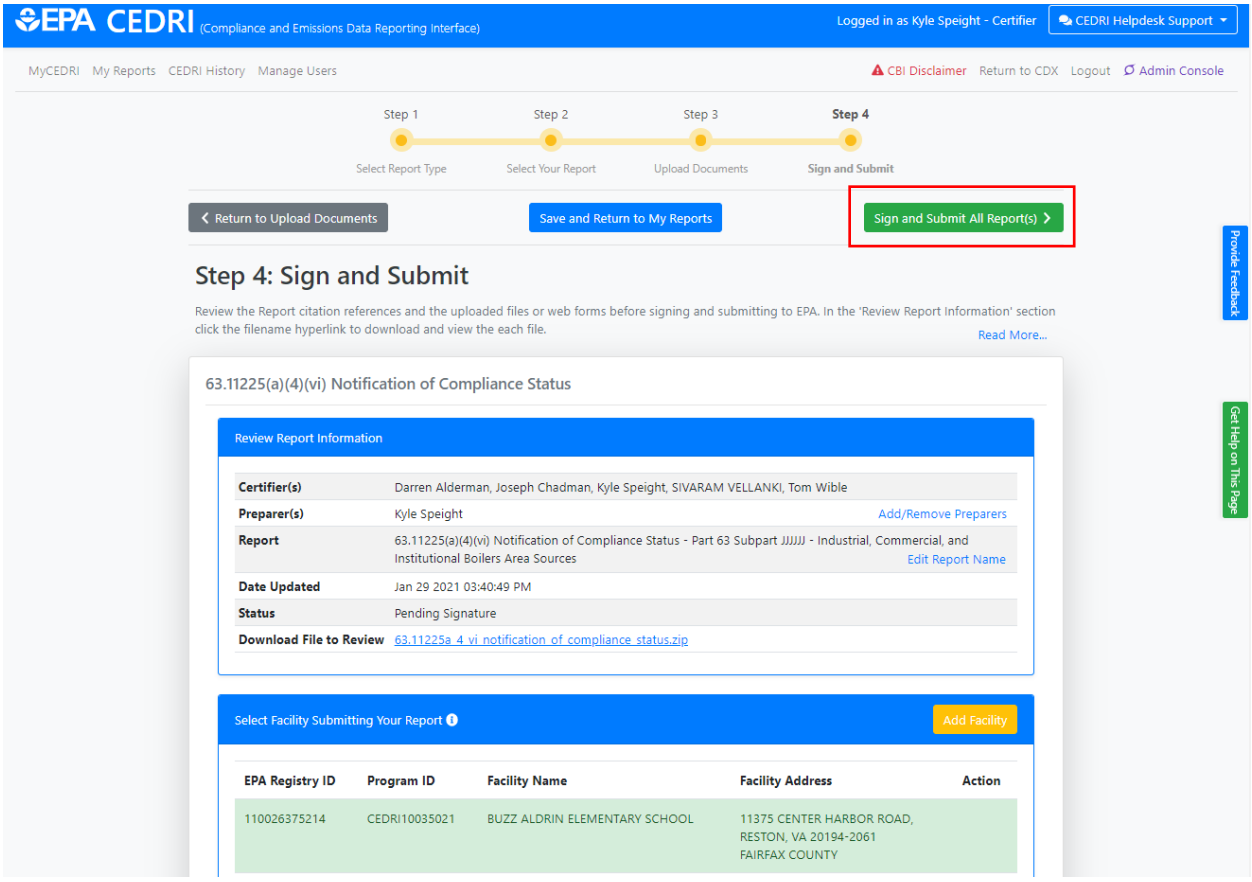

Exhibit 21

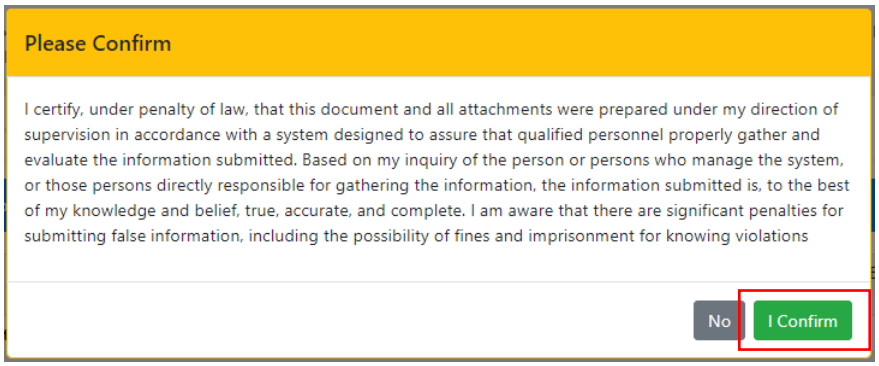

Exhibit 22

Selecting 'I Confirm' on the confirmation message launches the eSignature widget (Exhibit 23). This prompts you to enter your CDX password and answer one of your security questions (or receive a PIN via SMS if that option was selected during CDX registration). Once you have entered this information, select 'Sign' to sign and submit your reports to EPA.

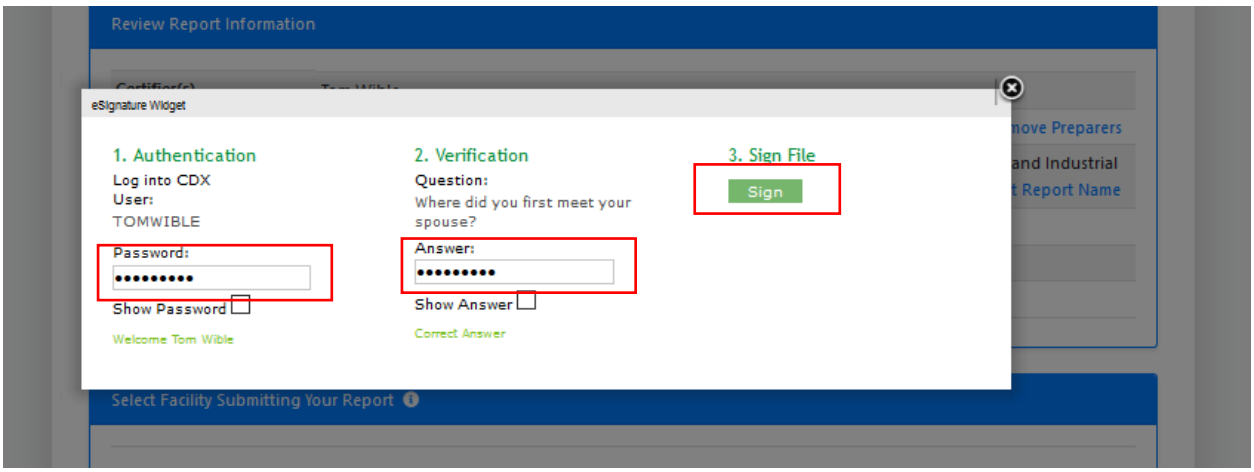

Exhibit 23