The instructions will cover CDX updates for the New Training Provider Dashboard role.
The handoff from CDX using "Training Notifications" has changed. Once the user is logged into CDX, they will be able to locate the NEW "Training Provider Dashboard (Notifications)" link under "Services" in place of the former "Training Notifications" link.
Handoff from CDX using the NEW "Training Provider Dashboard (Notifications)" link located under the role column on the "MyCDX" Homepage. This link is already available to those who previously had the "Training Notifications" link.
If a user has multiple Organization Names or Accreditation Numbers associated with their CDX account, they will be prompted to select which account Training Provider they are working for before proceeding to the dashboard.
Users can also access their Training Provider Dashboard by navigating to the Training Provider Public Site, located at https://cdx.epa.gov/XCDX/LeadTpCertification/Public. Users click “My Training Provider Dashboard” to login.
The CDX Login screen will display after the user clicks "My Training Provider Dashboard." The user should enter their CDX login information here.
If a user has multiple Organization Names or Accreditation Numbers associated with their CDX account, they will be prompted to select which account Training Provider they are working for before proceeding to the dashboard.
Users desiring to submit a training notification will click the "Training Notifications" tile.
Once the user accesses the "Training Notifications Home" page, the functionality is the same as it was before the deployment of the new Training Provider Dashboard. If user is new to Training Notification, please see the Lead User Guide on Training Provider Notification for more information.
Users wishing to submit an amendment to add or remove a Training Program Manager, Principal Course Instructor, or Training Facility can navigate to the "Manage People and Facilities" page from the dashboard by clicking the "Manage People and Facilities" tile.
Once on the "Manage People and Facilities" page users can add a new Training Program Manager by clicking the "Add New Training Program Manager" button or remove a Training Program Manager by clicking the "Remove" link next to the respective Manager. The user can perform similar actions for Principal Course Instructors and Training Facilities. Users can also choose whether they want to provide training at non-permanent facilities. In order to provide training at non-permanent facilities, users need to provide proper documentation, if they are not already accredited to do so.
Clicking the "Add New Training Program Manager" button will expand a new section with empty fields. "Documentation Type(s)" checkboxes will change with respect to which "Category" is chosen from the drop-down menu. At least one "Documentation Type(s)" must be checked per "Category." Checking a box will allow the user to upload the associated documentation. Uploaded documentation displays to the right of the respective checkbox. Users can view and/or remove uploaded documentation.
Manage People and Facilities

Saving the "Training Program Manager" will collapse the section and display as shown. Users will have the ability to "Edit" the newly added "Training Program Manager" until the form is submitted. "Training Program Manager" information already submitted and processed will not be available for edit. To make changes to an existing "Training Program Manager," users will need to remove that "Training Program Manager" and submit a new amendment with new information.
Clicking the "Add New Principal Course Instructor" button will expand the "Principal Course Instructors" section and the "Training Requirements" subsection with empty fields. Selecting "Categories," checking "Documentation Type(s)," and uploading documentation works the same as "Training Program Manager." A user can add/save multiple "Training Requirements" per "Principal Course Instructor."
When adding a "Training Requirement" for a "Principal Course Instructor," users will be able to select from multiple "Disciplines."
Clicking "Save" within "Training Requirements" will collapse the "Completion of Accredited Lead-specific Training Requirement" section. The user can then edit, remove, or add another new training requirement for the "Principal Course Instructor."
Clicking "Save" within the "Principal Course Instructor" section will save the "Training Requirements" and all other information added for that "Principal Course Instructor." Saving the "Principal Course Instructor" will collapse the section and display as shown. Users will have the ability to edit the newly added "Principal Course Instructor" until the form is submitted. "Principal Course Instructor" information already submitted and processed will not be available for edit. To make changes to an existing "Principal Course Instructor" users will need to remove that "Principal Course Instructor" and submit a new amendment with new information.
Clicking the "Add New Training Facility" button will expand the "Training Facilities" section.
Users have the ability to choose from multiple "Facility Types."
Manage People and Facilities

Saving the "Training Facility" will collapse the section and display as shown. Users will have the ability to edit the newly added "Training Facility" until the form is submitted. Training Facility information already submitted and processed will not be available for edit. To change existing "Training Facilities" information, users will need to remove that Training Facility and submit a new amendment with new information.
Clicking "Yes" for the "Do you plan to provide training at non-permanent facilities" button will allow the user to submit for accreditation to provide training at non-permanent facilities. The user will be required to upload supporting documentation. Providing information regarding non-permanent training facilities does not require adding "Training Facilities." Once "Non-permanent Training Facility" information is processed it cannot be unselected in future amendments.
Clicking "Remove" next to a current "Training Program Manager," "Principal Course Instructor," or "Training Facility" will remove that person or location following submission. Users are prompted to confirm the removal before continuing.
Clicking "Remove" next to a current "Training Program Manager," "Principal Course Instructor," or "Training Facility" will remove that person or location following submission. Removed names will be display in a red field with a line through it. Users have the ability to "Undo" any removals before submitting the form by clicking the respective "Undo" button.
Users must save all new additions prior to continuing to the "Manage People and Facilities - Review Page." Saved sections are collapsed.
The review page will contain all additions/removals made on the edit page. Information that has not been added or removed will not appear on the review page.
The "Signature" section at the bottom of the review page will allow users to click "Sign" and move forward with submitting the changes. Users can click "Previous" to move back to the edit page, or click "Cancel" to navigate back to the "Lead Training Provider Dashboard" without submitting any changes. All changes will be lost unless the application is signed and submitted. Users must check the box to affirm the "Certification Statement" before signing.
Clicking the "Certification Statement" link on the page will display the Certification Statement for the user to read.
Checking the signature checkbox and clicking "Sign" will display the attestation clause for the user to certify the new changes. "Accept" displays the "eSignature Widget" for the user to electronically agree to and sign the form. "Decline" will direct the user back to the review page.
To complete signing and submitting the changes, the user will have to: Provide the correct CDX password for the account, answer the "Verification" security question correctly, and click "Sign" within the "eSignature Widget."
Once the application is signed and successfully submitted, confirmation of the submission will display on the "Lead Training Provider Dashboard" in a green field with the application number and the date of the submission.
Application Submission

Paige Urbano,

Your application for Training Providers Applying for Accreditation for Lead-Based Paint Training has been signed and submitted to the EPA. To view the details of your application, please click here.

Application Number: T372027

Please do not respond to this message. If you have questions concerning this request, you may contact us by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll-free telephone support on 833-999-5995 between Monday through Friday from 8:30 am to 6:00 pm EST/EDT. For international callers, the CDX Help Desk can also be reached at (970) 494-5500.

Sincerely,
CDX Help Desk

A confirmation email containing the same information will also be sent to the email account associated with the user's CDX account.
Users will be able to navigate to the "Amendment – Information Only" page from the dashboard by clicking the "Amendment – Information Only" tile.
After selecting "Amendment – Information Only" tab from the dashboard, users are directed to the "Information Update Only" page where they can: Update the "Training Program Name" and "Website Listing Preferences", as well as their contact information and Business Address.
Clicking the "Continue" button will direct the user to the "Information Update Only – Review Page." This page provides the user the opportunity to review their "Training Provider Details" and make corrections if necessary.
The "Signature" section at the bottom of the review page will allow users to click "Sign" and move forward with submitting the changes, click "Previous" and move back to the edit page, and click "Cancel" to navigate back to the "Lead Training Provider Dashboard" without submitting any changes. All changes will be lost unless the application is signed and submitted. Users must check the box to affirm the "Certification Statement" before signing.
Clicking the "Certification Statement" link on the page will display the Certification Statement for the user to read.
Checking the signature checkbox and clicking "Sign" will display the attestation clause for the user to certify the new changes. "Accept" displays the "eSignature Widget" for the user to electronically agree to and sign the form. "Decline" will direct the user back to the review page.
To complete signing and submitting the changes, the user will have to: Provide the correct CDX password for the account, answer the "Verification" security question correctly, and click "Sign" within the "eSignature Widget."
Once the application is signed and successfully submitted, confirmation of the submission will display on the "Lead Training Provider Dashboard" in a green field with the application number and the date of the submission.
Application Submission

Paige Urbano,

Your application for Training Providers Applying for Accreditation for Lead-Based Paint Training has been signed and submitted to the EPA. To view the details of your application, please click here.

Application Number: T372055

Please do not respond to this message. If you have questions concerning this request, you may contact us by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll-free telephone support on 888-806-1995 between Monday through Friday from 8:30 am to 6:00 pm EST/EDT. For international callers, the CDX Help Desk can also be reached at (970) 494-9500.

Sincerely,
CDX Help Desk

A confirmation email containing the same information will also be sent to the email account associated with the user's CDX account.
Reaccreditation of current courses, renewal of expired courses, and adding new courses is done within the "Manage Course Accreditations" tile.
Users will also have an opportunity to update any existing information associated with their certification during this process. It is important to note that the user’s email confirmation will be sent to the email address selected from the “Contact Email” on the “ Applicant Information” screen. Users can click Continue to move to next “Accreditation Info”, however they have to fill the Contact Phone again.
On the “Accreditation Information” screen, users are able to reaccredit an existing course accreditation, renew an expired accreditation or request a new course accreditation. Users are required to perform at least one of these actions in order to be able to continue with the application process.
Users will be able to reaccredit an existing, non-expired course accreditation in the “Current Course Accreditations” section. If any changes have been made regarding facility, equipment, or course materials since the last application approval, they will need to upload documentation describing those changes; particularly changes that may adversely affect a student’s ability to learn.
If the user has any expired courses, they will appear in the “Expired Course Accreditations” sections. Renewing an expired notification costs the same as applying for new course accreditation for the same course. Renewing an expired accreditation requires that the user upload respective course materials. The user will not be allowed to renew an expired course if they have a current course of the same type.
Users will be able to add new courses in the “New Requested Course Accreditation” section. If the user has an existing certification they will have the ability to add new course accreditations. Adding a new course will require the upload of course materials, similar to renewing expired courses. If the user already has a similar course in current or expired accreditations the user will not be able to duplicate that course when requesting a new accreditation.
Users can submit all three accreditation application types. If they want to undo submission of one or more of the applications they can simply click the "Undo" button to the right of the respective accreditation. The user is required to submit at least one of the application types.
The “People and Places” screen will act the same as the “Manage People and Facilities” amendments application. However, here users will not be required to make any changes to “People and Places” unless they have not provided at least one Training Program Manager, Principal Course Instructor, or Training Facility. Users are required to have at least one of each in order to proceed. Selecting “Yes” and providing proper documentation for non-permanent training facilities is also acceptable to meet the minimum for Training Facilities.
The user can review all of their edits on the Review and Payment Page.
Users are assessed fees for changes or additions of accreditations for the entire application. New and expired-renewal accreditations are assessed NEW course accreditation fees per the fee schedule. Course reaccreditations of current, non-expired courses are assessed reaccreditation fees per the fee schedule. Users can make payment using credit/debit card, bank account(ACH) or payment code provided by their company.
Users will sign and finish paying for their application by entering their CDX password and clicking "Submit."
After successfully signing and paying for their application, users will be sent back to the "Lead Training Provider Dashboard" home page where their newly generated application number will be displayed along with the date the application for accreditation was submitted. A subsequent email confirmation with receipt will be sent to the user's chosen "Contact Email" address from the "Applicant Information" screen.
Users will have the ability to request replacements for any lost or misplaced certificates using the "Certificate Replacement Request" tile.
Prior to completing the request for certificate replacement, users have the option to change or update any information on the replacement certificate using the "Applicant Information" screen.
Expired course accreditations are not eligible for replacement. Users must select at least one current, non-expired course accreditation certificate to replace before continuing with the application.
All certificate replacement requests and any other changes made during form submission will be reviewable from the “Signature and Payment” screen.
Users will be charged $15.00 per certificate replacement request. There are no added charges for changing information during form submission as any changes are treated as amendments to the certificate.
Users will sign and finish paying for their application by entering their CDX password and clicking "Submit."
After successfully signing and paying for their application, users will be sent back to the "Lead Training Provider Dashboard" home page where their newly generated application number will be displayed along with the date the application for replacement was submitted. A subsequent email confirmation with receipt will be sent to the user's chosen “Contact Email" address from the “Applicant Information” screen.
Users will now have access to their CDX Inbox directly from the "Lead Training Provider Dashboard."
Here users will be able to view any of their inbox messages just as they had navigated to their inbox from the "MyCDX" home screen.
Preparers must be added by the Training Program Manager through the “Manage Preparers and Submissions” tile on the Training Provider dashboard.
Adding a Preparer to an existing Training Program

Users will have to click “Add Preparer” in order to add a preparer.
Adding a Preparer to an existing Training Program

Enter the preparer’s name in the fields on the “Add a Preparer” page.
Adding a Preparer to an existing Training Program

When a preparer is added their name will show up in the Preparers table. After a preparer’s name is added to the Preparers table, the preparer is able to register for a CDX account through the Training Provider public site. Please reference the Training Provider Preparer Role User Guide for step-by-step guidance to setup a Preparer's CDX account.
The Training Program Manager’s dashboard is also limited when the preparer submits a people and facilities amendment, course accreditation application, certificate replacement request, or info only amendment. The manager will need to sign these pending submissions by accessing them through the “Manage Preparers and Submissions” tile.
All pending submissions are listed in the “Pending Submissions” table on the “Preparer and Submission Management Home” page. The training program manager can click “Review” to review and sign a submission or “Delete” to delete a submission. Pending submissions on this table are not sent to EPA until reviewed and signed by the training program manager.
Clicking “Review” on a notification submission brings the program manager to the “Review Pre-Training Notification” page. Here the manager can review information submitted by the preparer and sign notifications to submit to EPA.
The Training Program Manager will see this message to confirm that the notification has been successfully submitted.
Submissions that require payment information will open to the “Review and Payment” page. Here the manager can review information submitted by the preparer, add payment information, sign, and submit to EPA. Preparers do not have the ability to add payment information on the preparer dashboard, so payment information must always be added by the Training Program Manager during review.
The Training Program Manager will see this message to confirm that the application has been successfully submitted.
If for any reason the Training Program Manager needs to disable a preparer’s dashboard, they can do this by clicking “Deactivate” next to the preparer’s name on the “Preparer and Submission Management Home” page.
A preparer whose dashboard has been deactivated will be redirected to the public site and see this message when they try to access their dashboard. A preparer’s dashboard may also be reactivated any time by clicking the “Reactivate” button next to their name on the “Preparer and Submission Management Home” page.
If a user has no valid accreditations, they will only be allowed limited access to the dashboard. They will only have access to the Inbox, Notifications, Manage Preparers and Submissions, and Manage Course Accreditations tiles.
If a user has no valid accreditations, they will only have the options to reaccredit expired courses or add new courses which will be charged the NEW accreditation fee.
The "To Do List" displays the 5 most urgent actions that the training program needs to complete with respect to post-training notification due dates and renewing accreditation expiration dates. The "To Do List" displays actions from one week prior to six months from the current date. Post-Training Notifications are due 10 business days after Training. Renovator, Refresher, E-Learning notifications are due on the 10th of every month. Accreditation renewals are due the date of expiration.

To view actions beyond the range of the last week and six months from today, click "Expand To Do List."
To view these actions in a calendar format, click "View Calendar" and apply the desired filters.
The expanded "To Do List" displays the due dates of the post-training notifications and expiration dates of accreditations similar to the To Do List on the Dashboard.

The contents of this list may be expanded to include other information. With all filters turned on, the user will see:

- Accreditation Expirations
- Accreditation Application Submissions
- Pre-Training Notification Submissions
- Post-Training Notification Submission
- Notification Due Dates
- Scheduled Training Dates
- Cancelled Training Dates
By selecting a different radio button within "Views," the calendar displays the same information on the "To Do List" in calendar format. Like the "To Do List", the contents of the calendar can be expanded to include other information by applying the filters to the right of the calendar.
The calendar can display "Views" by year, month, and day by selecting the appropriate radio button under "Views" to the right of the calendar.
A user is able to submit a post-training notification by clicking the appropriate task on the "To Do List." Clicking "Submit Post-Training Notification" within the pop-up window will lead the user to the "Create New Post-Training Notification" page. The user can also update, cancel, or view their pre-training notification.
If the user submits a post-training notification, the reminder will be removed from both the calendar and the To Do List. The user can see their notification that was submitted on the calendar and can view or update the notification.
If the user submits a cancellation notification, the reminder will be removed from both the calendar and the To Do List. The user can see their notification that was submitted on the calendar and can view the cancellation notification.
If the user submits an update notification that changes the training date, the training and post-training notification reminder will be moved to the appropriate date on the calendar.
A user is also able to submit an e-learning post-training notification by clicking the appropriate task on the "To Do List." Clicking "Submit Post-Training Notification" within the pop-up window will lead the user to the "Create New Post-Training Notification" page.

An e-learning post-training notification may also be submitted by clicking "New E-learning Post-Training Notification" under "Quick Actions."
An accreditation that is nearing expiration will be listed as a task within the "To Do List" if there are not more urgent issues within the list. The "To Do List" tile only displays information from 6 months into the future. Clicking on the expiring accreditation will allow the user to start the process of renewing the expiring accreditation. Clicking the "Renew" button within the pop-up will lead the user to the "Manage Course Accreditations" page.
Once the user submits their reaccreditation application, the expiration reminder will be removed from the calendar. A submission will be added to the calendar stating that the application is pending approval.
After the application is approved, the calendar will show when the new accreditation is issued and when it will expire.
Users will still have the ability to perform all the same actions within the "To Do List" and "Calendar" by clicking into the respective tiles on the Training Provider Dashboard. There is no functionality that is required to be performed through the "To Do List." It is simply to enhance the user's experience. The "To Do List" and "Calendar" DO NOT substitute the user's own records. Each training provider is required to keep their own records.
The "Application for Training Provider Accreditation" has moved to the Training Provider Public Site. On this page, users can create a new training program, request access to an existing training program, request access to a Training Program as a Preparer or log in to directly access their dashboard. Reaccreditations, Replacements, and Amendments are now handled from the Training Provider Dashboard.

https://cdx.epa.gov/XCDX/LeadTpCertification/Public