

How to Add TRI-MEweb and Add a Facility Profile to a New Preparer's CDX User Account.

Instructions for preparers who need a new Central Data Exchange (CDX) User account

Role: Preparer – Person who will be preparing TRI forms for submission but is not authorized to certify. Application Access: If you have never used CDX to prepare your TRI forms to EPA, you will need to create a new CDX user account to access the TRI-MEweb application for Forms R and/or A preparation. TRI Facility Account Access: User will need your 7 digit Access key and TRI Facility Identification Designator (TRIFID) assigned to their facility's location.

Instructions on how to register at the CDX website and add the TRI-MEweb application in your new CDX user account.

- 1. **Go** to http://cdx.epa.gov to create your new CDX user account.
- Read the Warning and Privacy notices.
- 3. On the CDX login page click on the button: "Register with CDX" See red arrow in Figure 1.

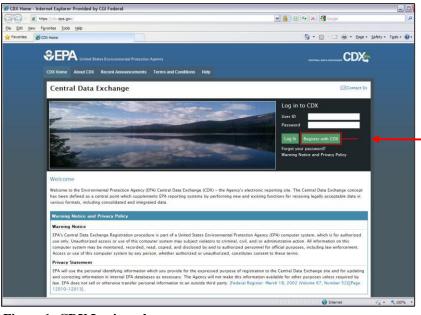


Figure 1: CDX Login web page.





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- 4. Review the Terms and Conditions, select "I Accept", and Click on the "Proceed" button.
- 5. You will then be forwarded to step 1 of 4 in the Core CDX Registration Process, the **Active Program Services List**. In the search field, enter "TRI," "TRI-MEweb," "EPCRA 313," or other TRI-related search terms and select "**TRIMEweb: Toxic Release Inventory Made Easy Web**" from the Active Program Services List, as shown in Figure 2.

TRIME: Toxic Release Inventory Made Easy TRIMEweb: Toxic Release Inventory Made Easy Web TSCA: TSCA VERIFY: Vehicles and Engines Compliance Information System VERIFY MFR REG: Request Manufacturer Code for Vehicle or Engine Compliance VERIFYDEV: Vehicles and Engines Compliance Information System WCIT: Water Contaminant Information Tool WHIPS: Wood Heater Information Processing System Cancel COX Help Desk: 888-890-1995 | (970) 494-5500 for callers from Puerto Rico and Guam EPA Home | About COX | Frequently Asked Questions | Privacy and Security Notice | Terms and Conditions | Contact Us

Did you know?

Your MyCDX account can host up to 64 EPA applications. TRI-MEweb is just one of them.

Figure 2: Adding TRI-MEweb application to your CDX user account.

- 6. On step 2 of the CDX Registration Process, you will be directed to the **Request Role Access** page. On the **Request Role Access** page, select the "**Preparer**" role from the dropdown menu. Click "**Request Role Access**" button.
- 7. On step 3 of the CDX Registration Process, provide your user and organization information on the **two-part** registration page. As shown in Figure 3, you will provide your name and other user information in Part 1 of this page; enter a **user ID**, **title**, **name**, **password**, and three **secret questions/answers** for identification verification.
 - a. **NOTE:** EPA strongly encourages you to print your answers and store it in a safe place, as it will be used to reset your password if you are ever locked out of your CDX user account. You will not be able to edit responses when CDX user account is created.



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- 8. On Part 2 of the **Provide User and Organization Information** page, you will also be required to search for and select an organization associated with your TRI Form submissions using the general or advanced search options (see Part 2 of Figure 3).
 - a. **NOTE:** If your organization is not found, you may click "**Request CDX add your organization**" link and manually enter your organization information.
 - b. a. **Tip:** Write your answers down and store in a safe place. You will not be able to edit your answers after CDX user account is created.

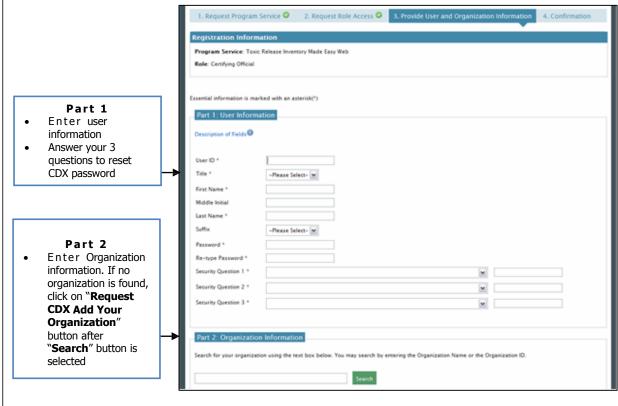


Figure 3: Provide user and organization information.



How to Launch TRI-

• Click the link (in red box) that is active.

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MEweb

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9. After you have selected an organization or requested that your organization be added, provide your personal email address and phone number, click the "**Submit**" button. Your email address is the key to receiving all CDX automated communications about the status of your reporting.

10. You will receive an automated email sent to your pre-registered email address. You will be required to re-login into your CDX user account.

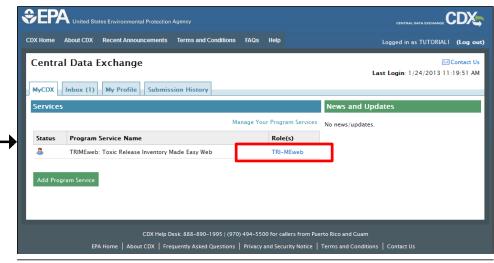


Figure 4: TRI-MEweb application ready to be accessed.

Instructions on how to add facilities to a preparer's CDX user account.

- 11. After registration process has been completed and user logging into their CDX user account, preparer will view their MYCDX page. Click on the "**TRI-MEweb**" link to open the TRI-MEweb application in a new browser window. To continue, select the method that applies to you:
 - a. **Method 1: Do you have your 8 digit access key assigned to your facility?** If your answer is No, go to Step 12, otherwise, answer the next question.
 - b. **Method 2: Has your facility reported to TRI in any reporting year after January 1, 2005?** If your answer is yes, go to step 18. If your location have reported in prior years, you will need to find your assigned TRIFID. Call CDX helpdesk for assistance in finding your assigned TRIFID. TRIFIDs are assigned to the physical location of the facility only.

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c. **Method 3: Are you using TRI-MEweb application to prepare TRI forms for a facility that NEVER reported to TRI in any prior year?** If your answer is Yes, your facility will need to request a new TRIFID. TRI-MEweb will create a new TRIFID automatically. Go to Step 24.

Method 1: Instructions to add a facility profile with your access key in TRI-MEweb that has reported under a TRIFID in prior years.

- 12. You have successfully opened the TRI-MEweb application from CDX. You are now ready to add your first account by establishing access to an existing TRI facility profile.
- 13. **First Time users of TRI-MEweb only:** TRI preparers may gain access to a prior year reporting facility in TRI-MEweb by obtaining the facility's 7-8 digit access key. Access keys can be obtained by calling the CDX Helpdesk at (888) 890-1995. Additionally, EPA may have sent the access key to the facility's technical contact in an email from CDX just before the updated TRI-MEweb application is released each year. Figure 5 displays the first TRI-MEweb page that first time users will view upon opening the TRI-MEweb application.
- 14. From the "Welcome" page, click the "+Access/Add Facility" button listed under option 3. See red box in Figure 5.
 - a. Note for Returning TRI-MEweb users that want to add a new facility account: You can also access and/or add facilities from the "My Facilities" tab located at the top of TRI-MEweb (orange box in Figure 5). Go to Step 20 to view TRI-MEweb Welcome page with accounts on it and to learn how to add a new account.



Did you know?

Users with a preparer role will NEVER see the **Certify** tab in TRI-MEweb.

Figure 5: Welcome page for user without any facility accounts. View option 3's "+Access/Add Facility" button.



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15. Next, select the radio button beside **Option 2** and enter your facility's access key in the access key field on the **Enter Facility's**Access key page as shown in Figure 6. Then, click the "**Next**" button.

Logged in as: MDONATIOT, DONATI

Proferences Save X Close

Welcome We Facilities Prenare Validate Transmit Periow as EDP.



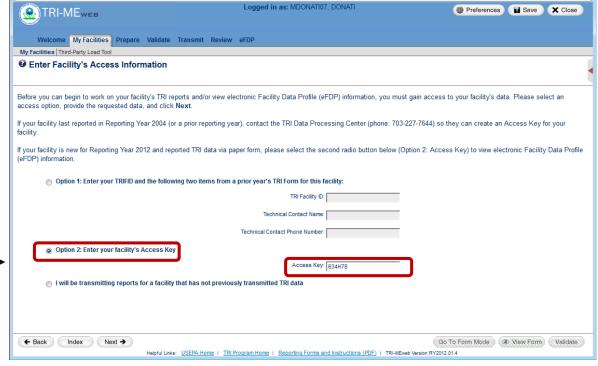


Figure 6: Select option 2 if you have the access key for your facility's TRIFID.

Method 2: Instructions for adding a new facility profile in TRI-MEweb using prior year contact information.

- 16. **First Time users of TRI-MEweb only:** The second method to add a facility profile consists of using prior year contact information that has been provided to EPA.
 - a. Note for Returning TRI-MEweb users that want to add a new facility account: You can also access and/or add facilities from the "My Facilities" tab located at the top of TRI-MEweb. Go to Step 20 to view the TRI-MEweb Welcome



Option 1

Enter tour TRI Facility

Designation (TRIFID)

and technical contact

information from any prior year submission

Identification

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page with pre-registered facility accounts on it and to learn how to add a new account.

17. Next, select the radio button beside **Option 1** and enter your facility's TRIFID and Technical Contact information from a prior year submission on the **Enter Facility's Access Information** page as shown in Figure 7. Then, click the "**Next**" button.

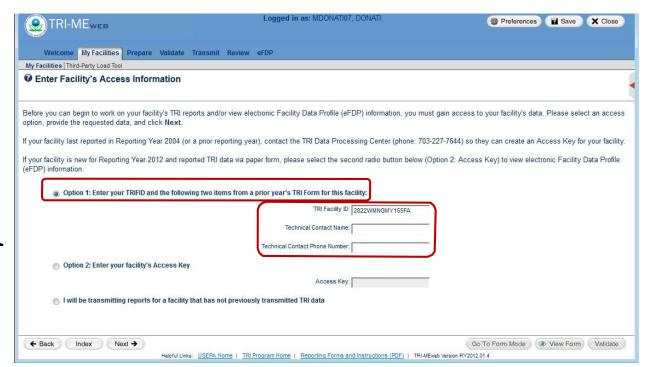


Figure 7: Enter the TRIFID, Technical Contact Name and Phone Number from your prior year TRI form to load your facility profile into TRI-MEweb.

- 18. Regardless of using Option 1 or Option 2 to gain facility access (see Figures 6 and 7), you will now need to select the appropriate radio button as shown in Figure 8. If the facility information shown is correct, choose the "Yes" radio button. Go to bullet (b) for facility name changes.
 - a. NOTE: If the facility information shown does not correspond to your facility physical location, choose the "No" radio button. Then, click the "Next" button. If needed, call the CDX Helpdesk for help obtaining the correct access key. Go to bullet (b) for facility name changes



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b. If your facility's name has changed (i.e., change of ownership) you may edit it by navigating to the **Prepare** tab after confirming the facility profile that is associated to your access key, selecting the reporting year facility's name changed and clicking **Next**, selecting the facility profile that needs to be edited on the **Select a Facility** page and clicking the "**Next**" button, and then selecting the "**Edit**" button where a change is needed on the **Facility Information Summary** page.

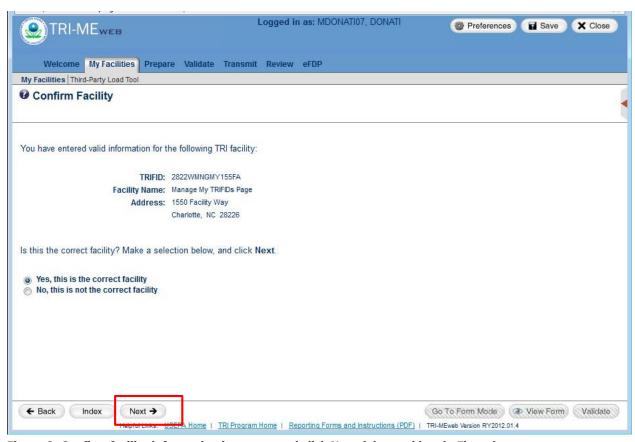


Figure 8: Confirm facility information is correct and click Next (view red box in Figure).



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19. If you indicated that the facility's information was correct, you will be directed to the **Access Granted** page as shown in Figure 9. You have now been granted access to the facility and may begin editing facility information, preparing chemical forms, or viewing submission history. You may also proceed to add a new certifying official or preparer to access the facility's profile. Please view the status of your Certifying Official of the users registered to your facility profile to determine if they are ready or not to certify. Click the **Welcome** tab (red box in Figure 9). Go to step 22.

The Status of your Authorized Users

 If no CDX User ID is listed, a CDX user account has not been created for user.

Certifying officials (CO):

- The ESA status of the CO assigned to your facility is listed under the ESA Status column.
- A status of Sign TRIFID Signature Agreement indicates that the CO has obtain approval of the CDX ESA, but still needs to sign the TRIFID Certification Agreement.
- A status of Sign CDX ESA indicates that the CO has provided a paper copy of ESA prior to RY 2012. The returning CO must electronically sign a new CDX ESA upon logging in to CDX for first time in RY 2013. TRIFID agreement has also not been signed. (rare)
- A status of Active Certification
 Official Available indicates that
 your assign CO has gotten approval of
 the ESA and signed the TRIFID
 Certification Agreement and is ready
 to certify any pending forms
 transmitted by the preparer.

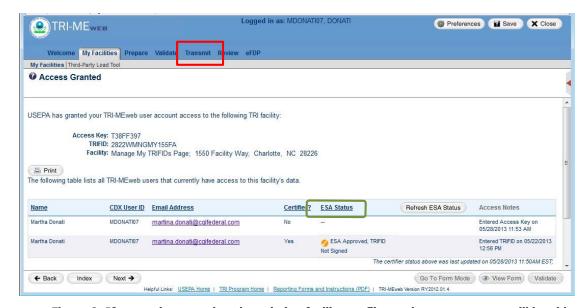


Figure 9: If access is granted to the existing facility profile, as the preparer, you will be able to see who has access to your account in the table shown here.



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Method 3: Instructions for adding a new facility profile that has never reported to TRI in any prior year.

20. **Returning TRI-MEweb users only:** The third option consist of creating a new facility account for a location that has identified themselves as a new reporting facility. The location of the new facility (under any prior ownership) must have never reported to TRI since 1986. Figure 10 shows a TRI-MEweb **Welcome** page for a retuning preparer with multiple pre-registered facility accounts already on it. Click the **"Manage My Facilities"** button. See red box in Figure 10.



Figure 10: Welcome page for user with pre-registered facility accounts. View the "Manage My Facilities" button.



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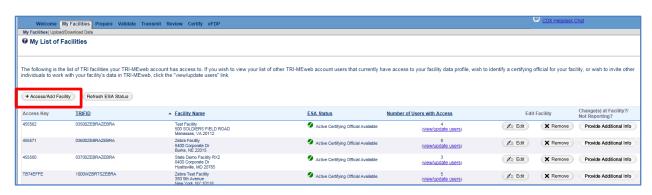
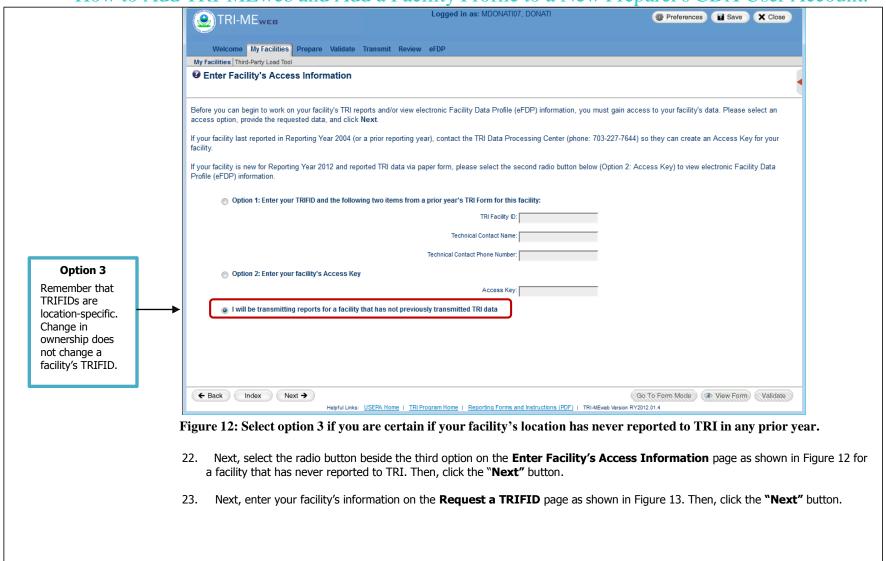


Figure 11: Adding more facility accounts to TRI-MEweb

21. Returning TRI-MEweb users only: The My List of Facilities page shows all the facility accounts that have been pre-registered into TRI-MEweb by the preparer. Click the "+Access/Add Facility" button, as shown in red box in Figure 11, to add a new facility account that is not listed on this page.

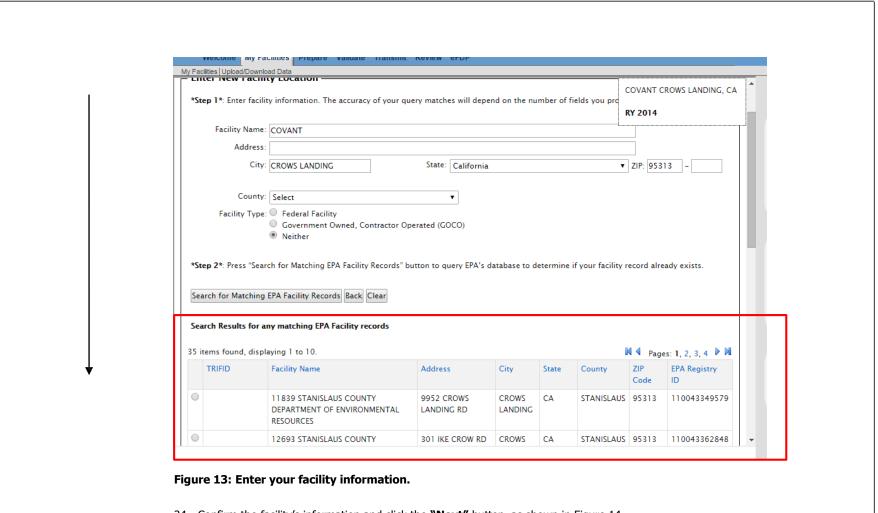


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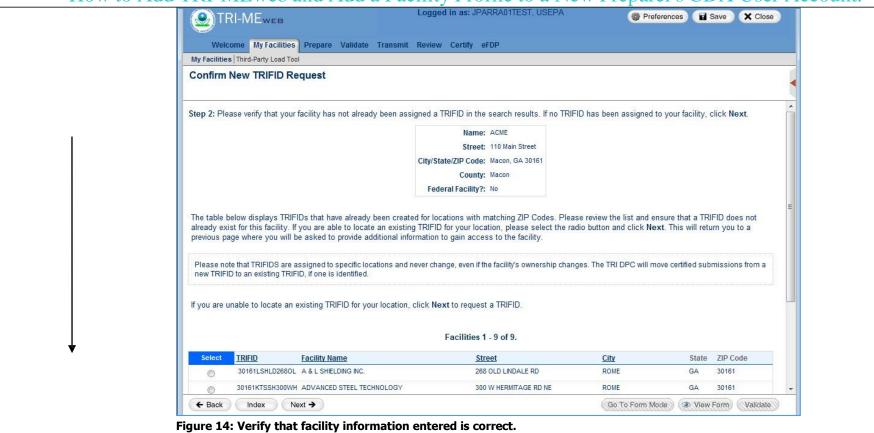


24. Confirm the facility's information and click the "Next" button, as shown in Figure 14.

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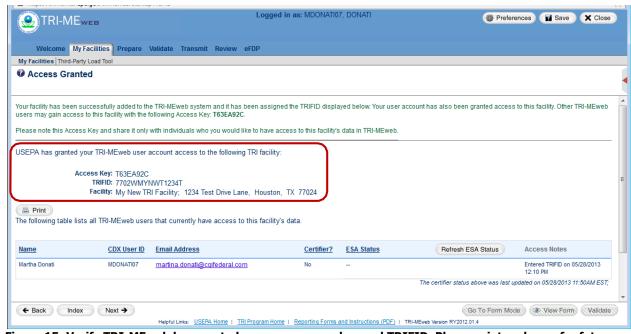


- 25. Verify that your facility profile does not match any TRIFIDs that have already been created for locations with matching ZIP Codes, if displayed in table. If you are not able to located an existing TRIFID for your location, click the "Next" button to request a new TRIFID. If you find a match, select the radio button next to you match and click the "Next" button. Go to bullet (b) if you need to edit your facility's name.
 - a. If your facility's name has changed (i.e., change of ownership) you may edit it by navigating to the **Prepare** tab after confirming the facility profile that is associated to your access key, selecting the reporting year facility's name changed and clicking the "Next" button, selecting the facility profile that needs to be edited on the **Select a Facility** page and clicking the "Next" button, and selecting the "Edit" button where a change is needed on the **Facility Information Summary** page.



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- 26. You should now be on the **Access Granted** page where you have been granted access to the facility profile and may begin preparing chemical forms. See Figure 15.
 - a. Tip: Print page in Figure 15 because this new TRIFID and access key is permanently assigned to your new reporting facility (unless EPA finds that a pre-existing TRIFID had been already created for your location- your eFDP report would indicate this change). You will use this new TRIFID in future reporting years.



Begin preparing your TRI Forms!

Figure 15: Verify TRI-MEweb has created your new access key and TRIFID. Please print and save for future use.

27. TRI reporting deadline is midnight July 1. Go to the **Prepare** tab to create and begin entering data to your TRI form.