



iBoard/CDX User Guide for Individuals and Company/Organization Points of Contact (POCs)

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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.



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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.



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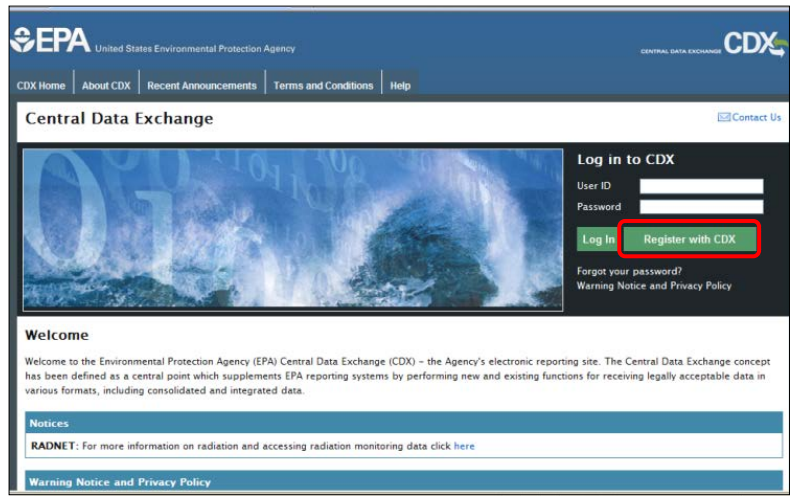
Section 1: CDX and iBoard Registration for New Users

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.





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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.

Contact Us

CDX Home » Terms & Conditions

Terms & Conditions

The access and use of CDX Registration for the electronic submittal of environmental information require the creation of a user ID and password that I must maintain and keep confidential. I will review the following steps concerning the creation and maintenance of a user ID and password.

Warning Notice

EPA's Central Data Exchange Registration procedure is part of a United States Environmental Protection Agency (EPA) computer system, which is for authorized use only. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action. All information on this computer system may be monitored, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including law enforcement. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms.

Privacy Statement

EPA will use the personal identifying information which you provide for the expressed purpose of registration to the Central Data Exchange site and for updating and correcting information in internal EPA databases as necessary. The Agency will not make this information available for other purposes unless required by law. EPA does not sell or otherwise transfer personal information to an outside third party. [Federal Register: March 18, 2002 (Volume 67, Number 52)][Page 12010-12013]

Choosing a CDX Password

For CDX registration purposes, I agree to select a password which will not be easily guessed (e.g., my name, my children's names, birthdays, etc.). Passwords must be a minimum of 8 alpha-numeric characters (no spaces or special characters) and contain at least 1 of each of the following:

- uppercase character
- lowercase character
- number

Passwords may *not* begin with a number nor contain the word "password" nor contain your User Name.

Protecting my CDX Password

I agree to protect my CDX password.

I will not divulge my password to any other individual; I will not store it in an unprotected location; and I will not allow it to be written into computer scripts to achieve automated login.

Limited CDX Software Distribution

Any distribution of software provided by the Environmental Protection Agency's Central Data Exchange shall be handled according to any defined license practices.

CDX provides tools which contains FIPS-validated RSA BSAFE Crypto-J which is classified under Export Commodity Classification Number (ECCN) 5D002 "Encryption Software" referenced under CCATS G059799. This product is eligible for license exception ENC under Sections 740.17 (A) and (B) (2) of the Export Administration Regulations (EAR). The exportation of this item classified by the Bureau of Industry and Security (BIS) as 5D002 "Unrestricted" to foreign subsidiaries of US companies is permitted under this license exception ("ENC "Encryption"). This license exception does not apply to the embargoed nations of Cuba, Iran, North Korea, Sudan and Syria or any parties found on the various government denial lists including the Department of Commerce Denied Parties List. For additional information and guidance regarding your use of this product, please refer to the United States' standard regulations for encryption at <http://www.access.gpo.gov/bis/ear/pdf/740.pdf>

Actions to take if my CDX Account has been Compromised

If I have determined that my CDX account has become compromised, I agree to contact the CDX Technical Support staff at 888-890-1995 or (970) 494-5500 for callers from Puerto Rico and Guam as soon as possible.

Terminating my CDX Account

I agree to notify CDX within ten working days if my duties change and I no longer need to interact with the CDX on behalf of my organization. I agree to make this notification via either the CDX web interface or by notifying the CDX Technical Support staff at 888-890-1995 or (970) 494-5500 for callers from Puerto Rico and Guam. This notification will allow CDX to deactivate my account and protect it from potential abuse by others.

☒ I Accept

☐ I Decline

Proceed

Cancel



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- 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**.)



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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.)

Part 2: Organization Information

Search for your organization using the text box below. You may search by entering the Organization Name or the Organization ID.

Select your organization from the table below.

Organization Id	Organization Name	Address	City	State	ZIP Code
Too many organizations found. Please refine your search using the advanced search below and try again.					
Can't find your organization? Use advanced search or request that we add your organization.					

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.

Part 2: Organization Information

Organization Name *

Country *

Mailing Address *

Mailing Address 2

City *

State *

ZIP/Postal Code *

Email *

Re-enter Email *

Phone Number *

Phone Number Ext

Fax Number

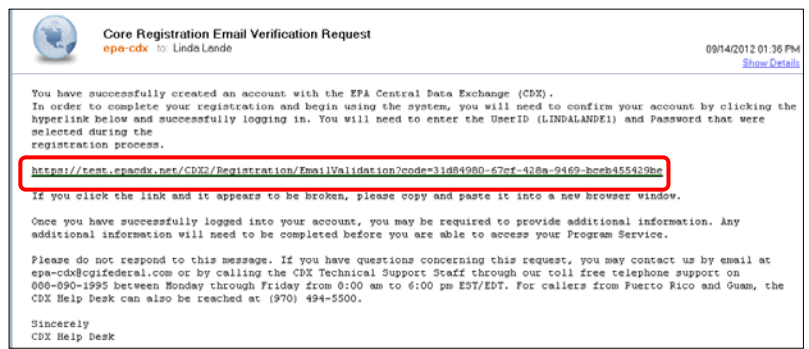


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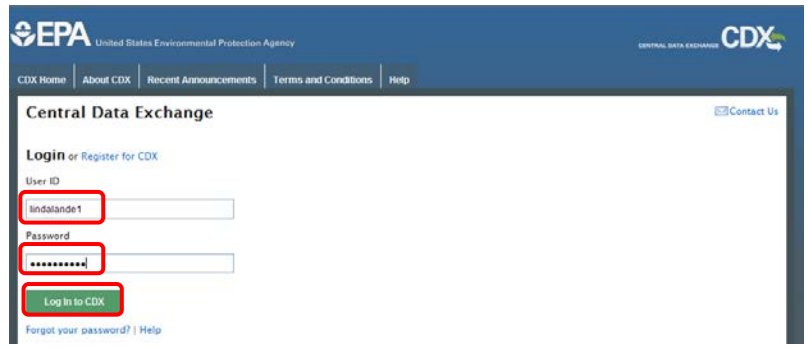
1.7 A "Confirmation" page appears.



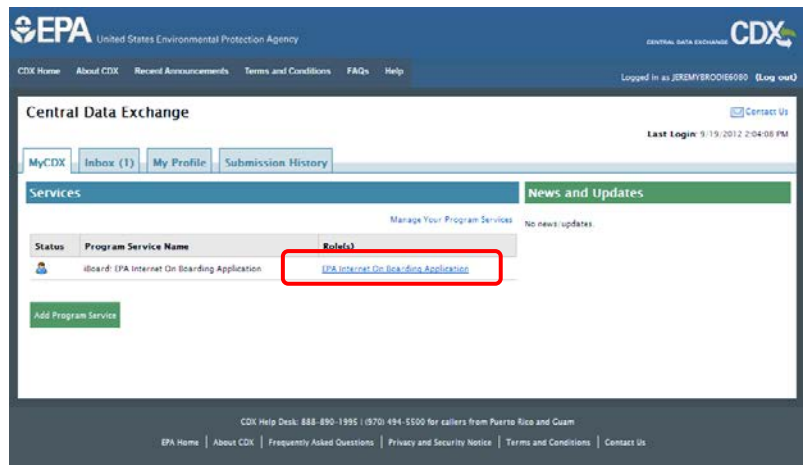
1.8 Retrieve your CDX registration from your email.
Click the link provided.



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](#)."





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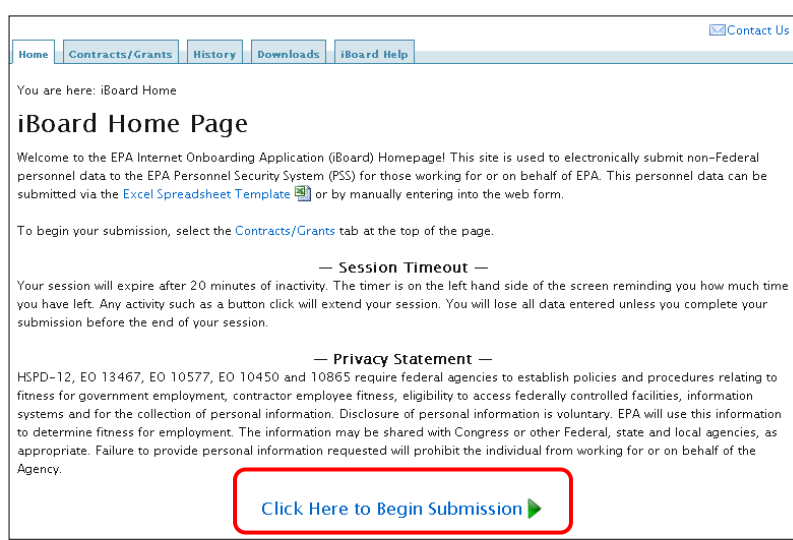
Section 2: Submitting Non-EPA Personnel Information Using iBoard

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).





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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

Contract/Grant Submission

Organization Point Of Contact (POC) Information

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 MyCDX link 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: Linda
Last Name: Lande
CDX UserId: LINDALANDE
Organization Name: XYZ
Email Address: lande.linda@epa.gov
Phone Number: 2025646654
Extension:

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

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: *

Continue ➡

Personnel Type	What to use for Contract / Grant Number	CO / AO Information	COR / PO Information	“Alternate COR” Information	What to use for “Alt POC”
EPA Contractor	EPA contract number	EPA person in Contracts	The EPA federal supervisor	Could also be the EPA federal supervisor	Name of contracting company supervisor
Student Services Contractor	EPA contract number	EPA person in Contracts	Your EPA federal supervisor	Could also be your EPA federal supervisor	Your name
Non-EPA Contractor	Contract number	The EPA federal contact	The EPA federal supervisor	The EPA federal employee contact	Name of COTR of non-EPA agency
Volunteer (enter as Grantee)	Your name	Your EPA monitor	Your EPA monitor	Your EPA monitor	Your name
SEE Program Member	Cooperative Agreement Number	Angela Hughes	Roxann Elmore	Angela Hughes	Your organization contact
Grants/ORISE Internship Program	Agreement number	EPA Program Office federal contact	Your EPA federal supervisor	EPA Program Office contact	Your agency/ organization contact
Non-EPA Federal Employee	Your Name	Your EPA Point of Contact	Your EPA Point of Contact	Your EPA Point of Contact	Your Agency Point of Contact



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2.3 If you don't know someone's email address, click **Find**.

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**

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.

Find EPA Employee

Last Name: * Hart

First Name: * Michael

Clear **Find**

First Name	Last Name	Email	Phone
Michael	Hart	Hart.Michael@epa.gov	202-566-1696

Select

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

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**

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: *

Continue

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.)



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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

- “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**.



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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.
 - o To add more individuals to the contract/grant, click the **Click Here** link. A new web form appears.
 - o 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.



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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**.

[Home](#) | [Contracts/Grants](#) | [History](#) | [Downloads](#) | [iBoard Help](#)

You are here: [iBoard Home](#) » [Contract/Grant Submission Review](#)

Review Contract/Grant Manual Submission

Organization Point Of Contact (POC) Information

First Name:	Linda
Last Name:	Lande
CDX UserId:	LINDALANDE
Organization Name:	XYZ
Email Address:	lande.linda@epa.gov
Phone Number:	2025646654
Extension:	

Contract/Grant Information

Contract/Grant Number:	4565
Contracting Officer (CO)/ Award Official (AO) Email:	ross.jon@epa.gov
Contracting Officer's Rep (COR) Email:	johnson.tina@epa.gov
Alternate COR Email:	lande.linda@epa.gov

Alternate Organization POC

Alternate Organization POC Email:	brodie.jeremy@epa.gov
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Non-Federal Employee Information (2 Non-Federal Employees)

Non-Federal Employee 1

SSN:	***-**-5555
First Name:	John
Last Name:	Smith
Middle Initial:	O
Suffix:	
Position:	Trainer
Email Address:	smith.john@epa.gov
Program Office:	OFFICE OF ADMINISTRATION RESOURCES MANAGEMENT
Work City and State:	WASHINGTON - DC
Birth Date:	03/11/1958
Birth City:	Burtonsville
Birth Country:	UNITED STATES
Birth State:	MARYLAND
Citizenship:	US CITIZEN BY BIRTH
IT Access:	YES
Physical Access:	YES
Firearm Required:	NO

Non-Federal Employee 2

SSN:	***-**-7432
First Name:	Jane
Last Name:	Doe
Middle Initial:	
Suffix:	
Position:	secretary
Email Address:	doe.jane@epa.gov
Program Office:	OFFICE OF ADMINISTRATION RESOURCES MANAGEMENT
Work City and State:	WASHINGTON - DC
Birth Date:	05/03/1967
Birth City:	Detroit
Birth Country:	UNITED STATES
Birth State:	TEXAS
Citizenship:	US CITIZEN BY BIRTH
IT Access:	NO
Physical Access:	YES
Firearm Required:	NO

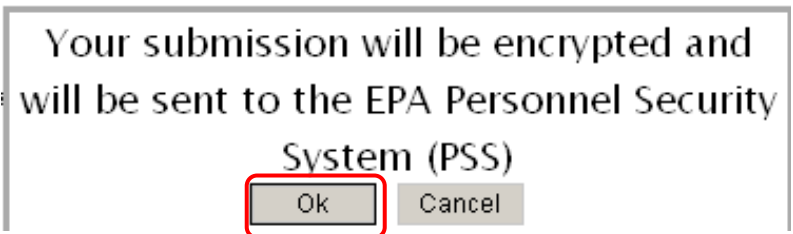
Back

Submit



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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.

Home	Contracts/Grants	History	Downloads	iBoard Help
You are here: iBoard Home » History				
Success!				
Your submission is being processed. You can check the status of the submission below. Submission results will be emailed to you once processing completes.				
Contract Number	Created	Submitted	Status	
123	5/10/11 12:08 PM	5/10/11 12:08 PM	Processing	details
56578	5/9/11 6:45 PM	5/9/11 6:45 PM	Failed	details
66678	5/9/11 6:26 PM	5/9/11 6:26 PM	Failed	details
77777	5/9/11 6:04 PM	5/9/11 6:04 PM	Failed	details
66667	5/9/11 6:01 PM	5/9/11 6:01 PM	Completed	details
45634	5/9/11 2:13 PM	5/9/11 2:13 PM	Completed	details

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.