# **ODS REPORTING**

# **Registering with CDX**

**July 2018** 

#### I. INTRODUCTION

This document provides information for reporting entities on how to register with the Central Data Exchange (CDX) for the purposes of submitting data to the Environmental Protection Agency (EPA) on ozone depleting substances (ODS), as required by 40 CFR Part 82. All individuals that report ODS data electronically on behalf of a reporting entity must register with the ODS Program within CDX. For information on how to complete an ODS report, see EPA's document on *Preparing Data for Submission*. For information on how to submit an ODS report using CDX, see EPA's document on *Submitting Data to EPA*. The remainder of this document is organized as follows:

- Section II: Register with CDX (First-Time Users)
- Section III: Add ODS to your Program Services (Existing Users)
- Section IV: Register Under a New Organization (Existing Users)
- Appendix A: Provide EPA with your Organization ID
- Appendix B: Update your Account Information
- Appendix C: Deactivating Accounts

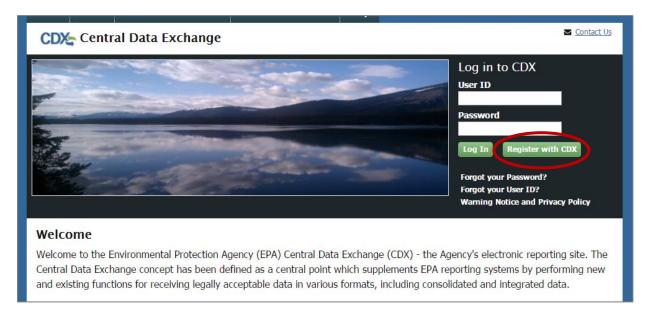
#### **Questions?**

For questions about ODS reporting, contact Mike James at **(202) 343-9192** or <a href="mailto:james.mike@epa.gov">james.mike@epa.gov</a>. For questions about CDX, contact the CDX Helpdesk at **(888) 890-1995** or <a href="mailto:helpdesk@epacdx.net">helpdesk@epacdx.net</a>.

# II. REGISTER WITH CDX (FIRST-TIME USERS)

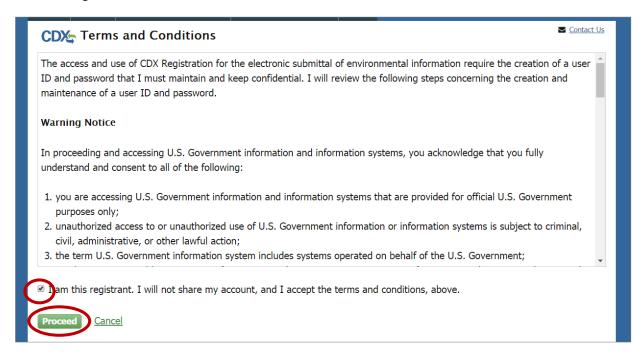
#### **Step 1: Initiate the Registration Process**

Visit https://cdx.epa.gov/ and select "Register with CDX."



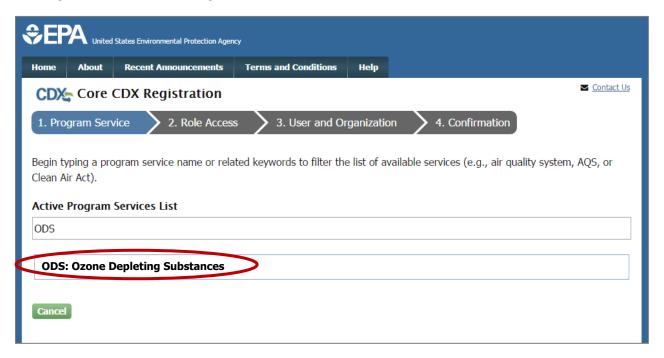
# Step 2: Read and Accept the Terms and Conditions

After reading the Terms and Conditions, check the box and click "Proceed."



#### Step 3: Select "ODS: Ozone Depleting Substances" from the Program List

Locate and select "ODS: Ozone Depleting Substances" from the list of active program services by either scrolling down the list or entering "ODS" in the search criteria box.

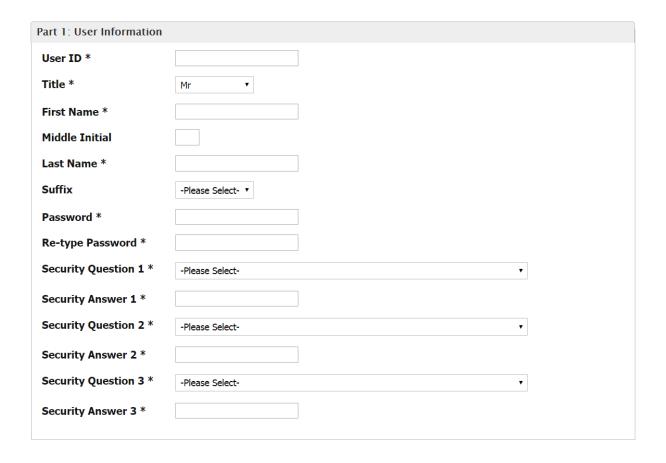


#### **Step 4: Enter User Information**

- Create a unique User ID, which must be more than 7 characters long.
- Select a title and enter your first and last name. Middle initial and suffix are optional.
- Choose a password, which must contain at least one uppercase letter, one number, and be at least 8 characters long. The password must begin with a letter and may only contain letters and numbers.
- Select three security questions and provide an answer for each one.

Note: It is important that you remember your username, password, and the security question answers entered in Part 1: User Information; you will need this information to access your CDX account and submit reports to EPA.

#### Register with CDX (First-Time Users)



#### **Step 5: Search for Your Organization**

Search for your organization by typing the name of your organization or the Organization ID (if known) in the text box and clicking "Search."



# The Importance of your Organization ID

CDX assigns each organization in its database with a unique 5-7 digit ID. The Organization ID you register with and submit data under in CDX is used by the ODS Tracking System to identify the reporting entity of each submission. Additionally, all users registered under the same Organization ID have access to the same Submission History table in CDX (as described in EPA's document on *Submitting ODS Data*). The use of a consistent Organization ID by all individuals that submit reports on behalf of your company is required by EPA. See *Appendix A* for the form that should be used to notify EPA of your company's Organization ID.

- → If your organization appears in the search results, continue to Step 6a.
- → If your organization is not already in CDX, skip to Step 6b.

#### **Step 6: Select Your Organization**

If your organization appears in the search results, click on the link under 'Organization ID.'

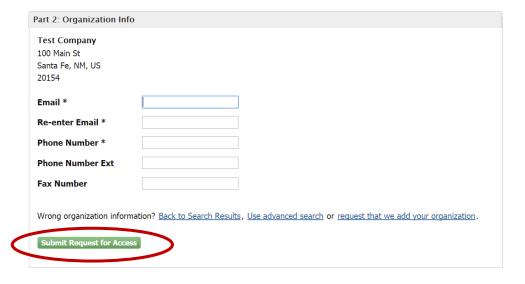


### What if My Organization's Address is Different from my Address?

To ensure the accurate tracking of ODS data, EPA requires each reporting entity to use a consistent Organization ID in CDX. If your company has already begun using an Organization ID in CDX, but the address listed for that Organization ID is for a different facility/location than the address of the individual registering, you should still register under the established Organization ID. You will have the option to tailor the primary contact's address when you submit a report to EPA. If your company has not previously submitted ODS data to EPA under an existing Organization ID in CDX, you may add a new organization entry to CDX by following steps 6b-7b. See *Appendix A* for the form that should be used to notify EPA of your company's Organization ID.

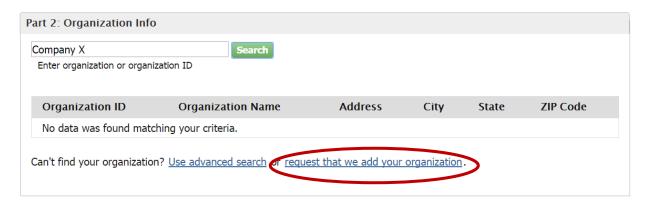
### **Step 7a: Enter Organization Information**

Enter your email, phone number, and fax number (if desired), and select "Submit Request for Access."



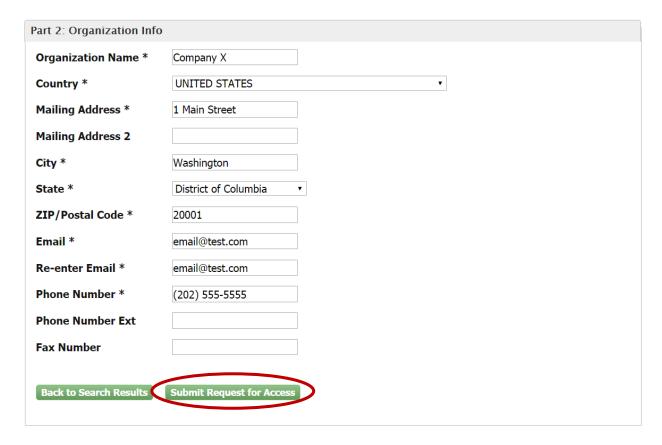
## Step 7b: Request to Add Your Organization

If your organization's information is not already in CDX, you may request for CDX to add your organization by clicking on the link to "request that we add your organization."



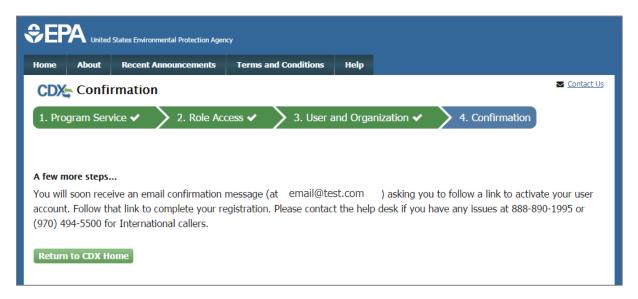
#### Step 7c: Submit Request to Add an Organization

Enter your organization information and then click "Submit Request for Access."

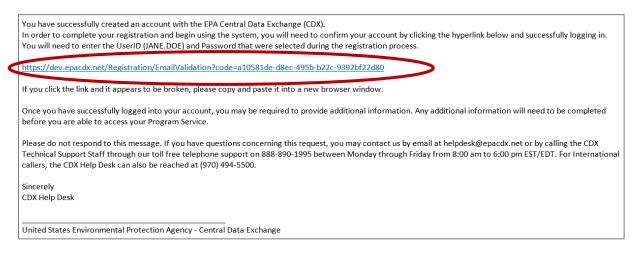


#### **Step 8: Activate Your Account**

Once you submit a request for access, you will be directed to the Confirmation page, indicating that an email has been sent to the email address provided under Step 7.



Locate the email and click on the link provided within the body of the email.



#### **Step 9: Log in to CDX**

Enter your CDX User ID and Password, as created under Step 4, and click "Log In to CDX."



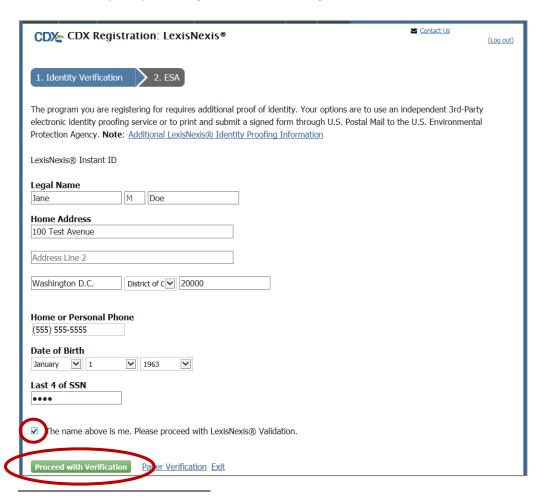
#### **Identity Proofing in CDX**

As part of the CDX registration process, EPA requires proof of your identity. You may use an independent third party electronic identity proofing service (i.e., LexisNexis) or print and submit a signed electronic signature agreement (ESA) through U.S. Postal Mail to EPA. LexisNexis, which is only available to users located within the United States, allows users to immediately access the ODS data flow following authentication; users that submit a paper ESA are required to wait 7-10 days for EPA to receive their ESA and approve them for access.

- → If you wish to verify your identity using LexisNexis, continue to Step 10a.
- → If you wish to submit a signed ESA through U.S. Postal Mail, skip to Step 10b.

#### Step 10: Verify your Identity using LexisNexis

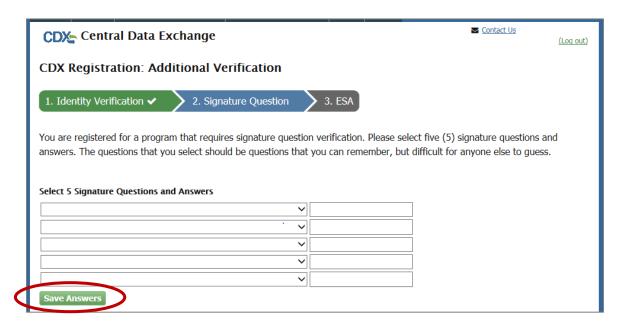
Enter your address, date of birth, and last 4 digits of your Social Security Number (SSN). Verify that the name above is you by checking the box and clicking "Proceed with Verification."



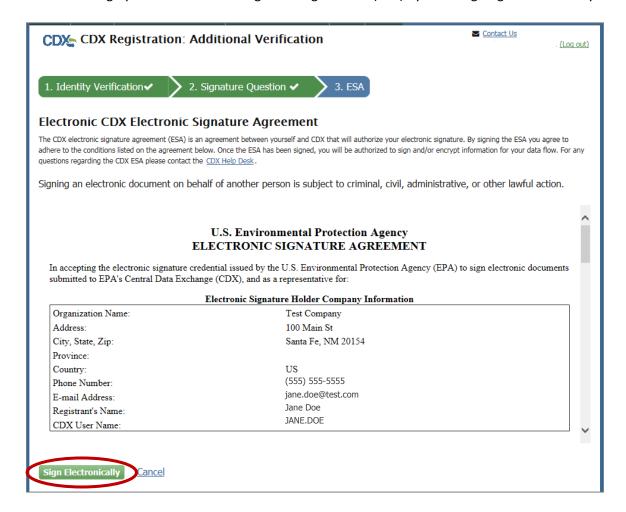
<sup>&</sup>lt;sup>1</sup> If you have concerns about providing this information, click on the link for 'Additional LexisNexis Identity Proofing Information.'

#### Register with CDX (First-Time Users)

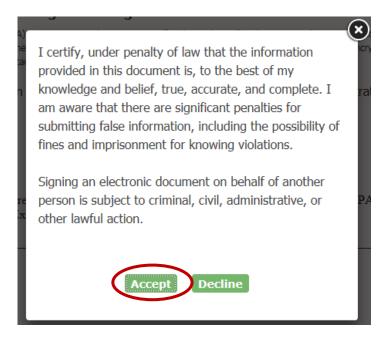
Select five signature questions and provide answers to the questions. Select "Save Answers."



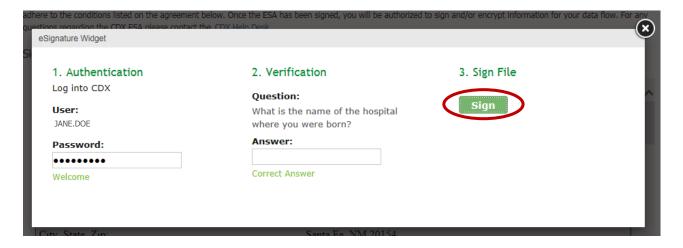
Review and sign your CDX electronic signature agreement (ESA) by selecting "Sign Electronically."



Certify that the information provided is correct by clicking "Accept."



Enter your account password, the answer to the security question, and select "Sign."

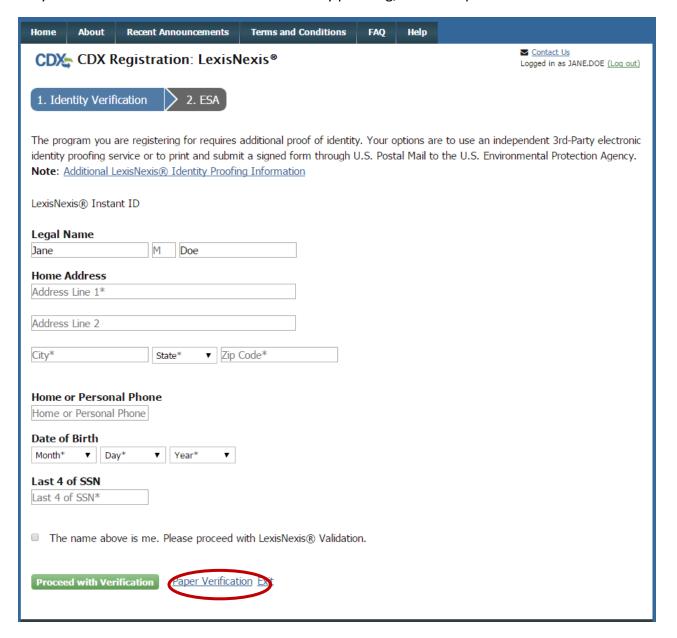


# Congratulations!

You are now registered with CDX under the ODS Program.

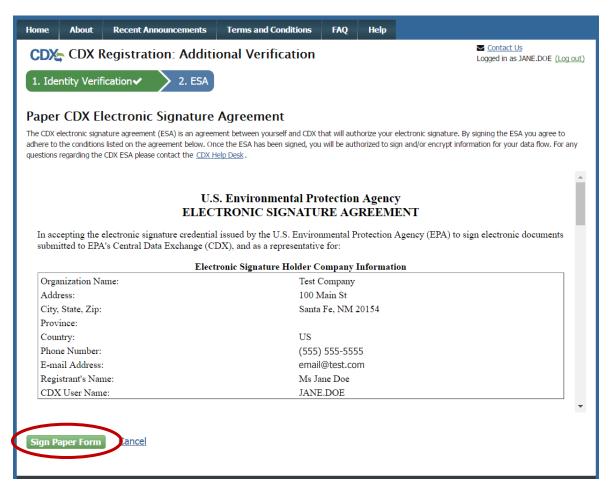
## Step 11a: Submit Signed ESA through U.S. Postal Mail

If you do not wish to use LexisNexis for identity proofing, select "Paper Verification."



#### Register with CDX (First-Time Users)

Select "Sign Paper Form" and then "Print to Mail." Save an electronic copy of the ESA to your computer as a PDF, and then print a hard copy of the file.





#### Step 11b: Read, Sign, and Mail the Electronic Signature Agreement to EPA

Review and sign the Electronic Signature Agreement, and mail the document to EPA using one of the following addresses, which are also provided in the Electronic Signature Agreement:

#### **For Private Courier:**

U.S. Environmental Protection Agency Tracking System Program Manager Stratospheric Protection Division William Clinton East Building, Room 1340 1201 Constitution Avenue, N.W. Washington, DC 20004

#### For U.S. Postal Service:

U.S. Environmental Protection Agency Stratospheric Protection Division Office of Atmospheric Programs Mail Code: 6205T 1200 Pennsylvania Avenue, N.W. Washington, DC 20460

#### **Step 12: Final Registration Notification**

Once EPA has received the signed ESA by mail, your account will be activated. Account activation is expected to take 7-10 days. You will be notified by email when your account has been activated.

The Environmental Protection Agency's Central Data Exchange (CDX) registration system has processed a change in registration status.

If you have questions concerning this change in registration status, you may contact us by email at <a href="https://helpotestage.net">helpotestage.net</a> or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995 between Monday through Friday from 8:00 am to 6:00 pm EST/EDT. For callers from Puerto Rico and Guam, the CDX Help Desk can also be reached at (970) 494-5500.

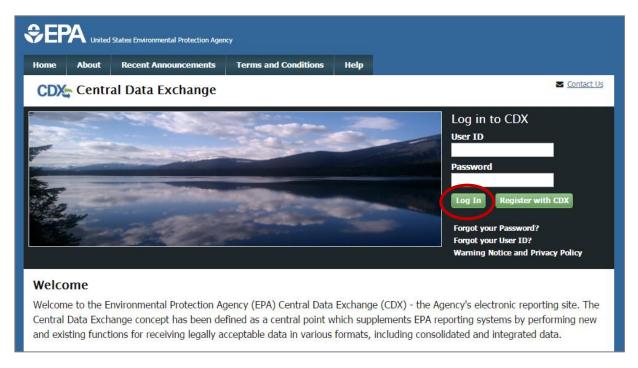
# Congratulations!

You are now registered with CDX under the ODS Program.

## III. ADD ODS TO YOUR PROGRAM SERVICES (EXISTING USERS)

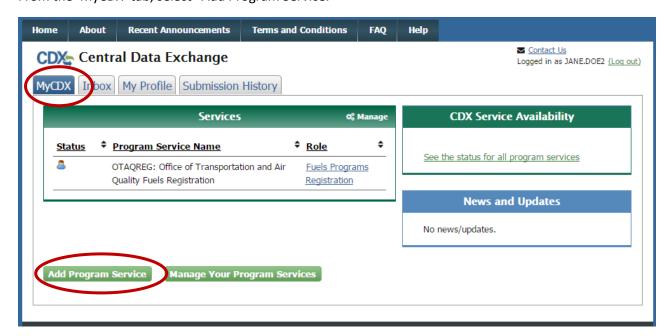
#### **Step 1: Log into CDX**

Visit <a href="https://cdx.epa.gov/">https://cdx.epa.gov/</a>, enter your account information, and select "Log In."



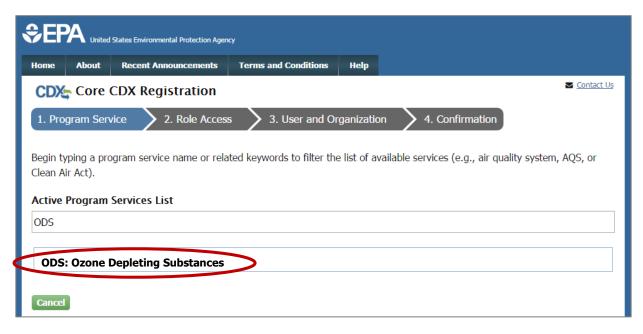
#### **Step 2: Add Program Service**

From the 'MyCDX' tab, select "Add Program Service."



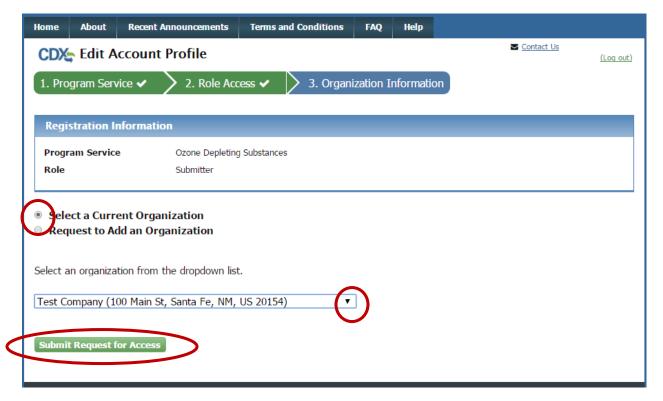
## Step 3: Select "ODS: Ozone Depleting Substances" from the Program List

Locate and select "ODS: Ozone Depleting Substances" from the list of active program services by either scrolling down the list or entering "ODS" in the search criteria box.



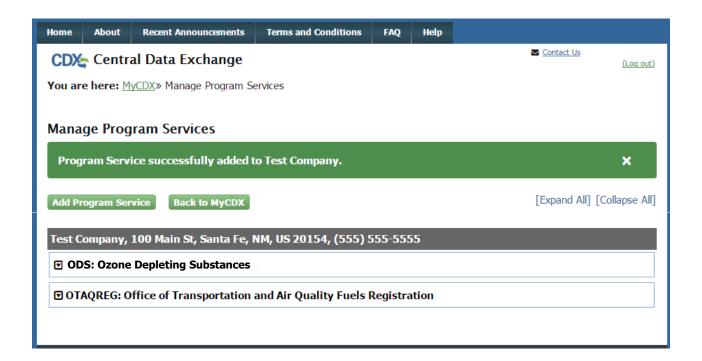
#### **Step 4: Select a Current Organization**

Select a current organization from the dropdown list and select "Submit Request for Access." If you want to register under a new organization, see Section IV.



## Why don't I Need to Sign Another ESA?

The electronic signature agreement (ESA) is specific to the organization under which you register. Therefore, since you already submitted an ESA when registering for another CDX program, you are not required to sign and submit a new electronic signature agreement.



# Congratulations!

You have successfully added ODS to your Program Services.

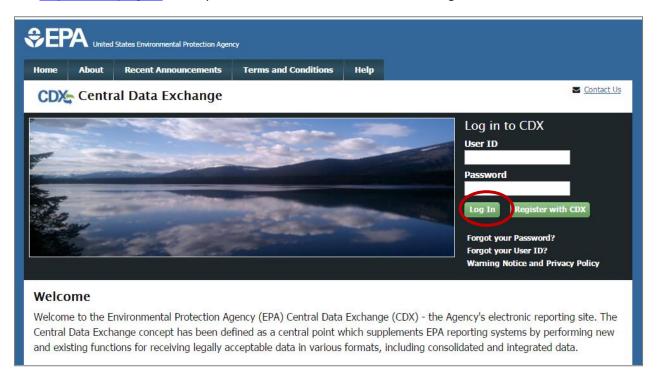
## IV. REGISTER UNDER A NEW ORGANIZATION (EXISTING USERS)

#### When Should I Register under a New Organization?

The organization you register with and submit data under in CDX is used by the ODS Tracking System to identify the reporting entity of each submission. CDX assigns each organization in its database with a unique 5-7 digit ID. The use of a consistent Organization ID by all individuals that submit reports on behalf of your company is required by EPA. If your company has previously submitted ODS data to EPA through CDX under an Organization ID, you should only register and submit data under a new Organization ID in CDX if the name of your organization changes (e.g., due to a merger or acquisition). See *Appendix A* for more information on notifying EPA of your organization's name change.

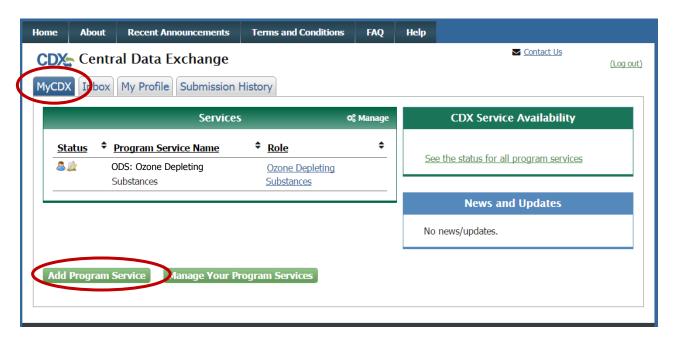
#### Step 1: Log into CDX

Visit <a href="https://cdx.epa.gov/">https://cdx.epa.gov/</a>, enter your account information, and select "Log In."



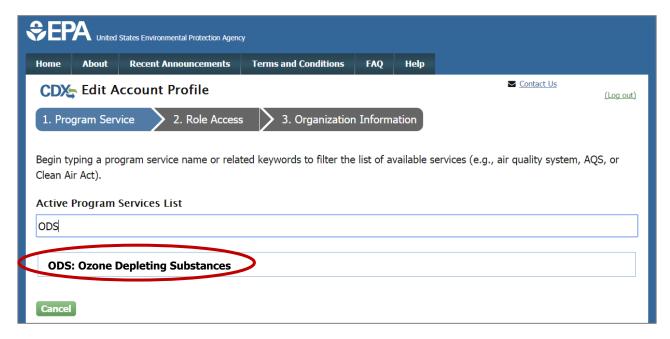
#### **Step 2: Modify Program Services**

From the 'MyCDX' tab, select "Add Program Service."



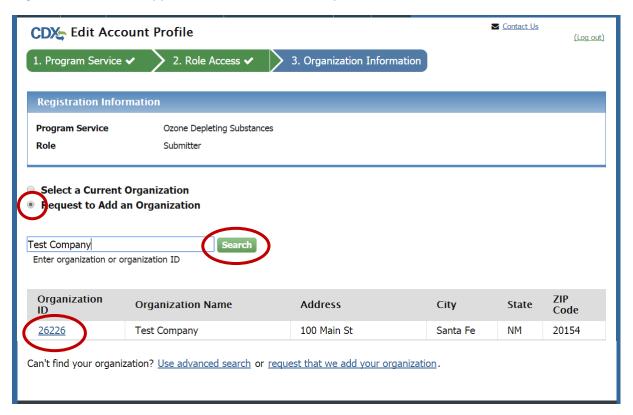
## Step 3: Select "ODS: Ozone Depleting Substances" from the Program List

Locate and select "ODS: Ozone Depleting Substances" from the list of active program services by either scrolling down the list or entering "ODS" in the search criteria box.



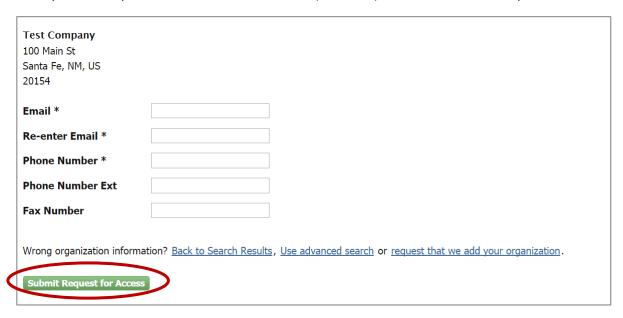
#### **Step 4: Select New Organization**

Request to add a new organization by typing the name of your organization or the CDX Organization ID (if known) in the text box, clicking "Search," and clicking on the link under 'Organization ID.' If your organization does not appear in the search results, skip to 4b.



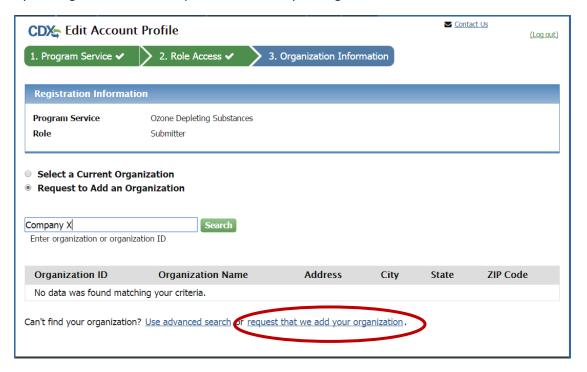
#### **Step 5: Enter Organization Information**

Enter your email, phone number, and fax number (if desired) and select "Submit Request for Access."



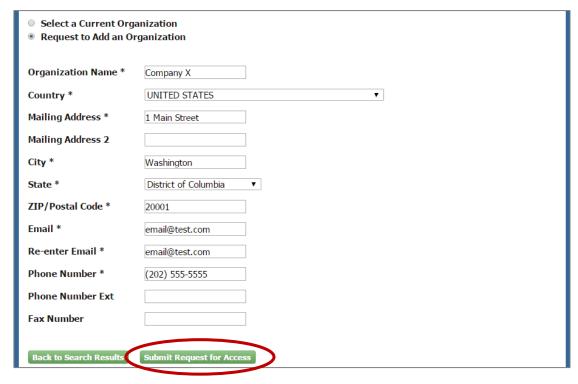
#### **Step 6: Request to Add Your Organization**

If your organization's information is not already in CDX, you may request for CDX to add your organization by clicking on the link to "request that we add your organization."



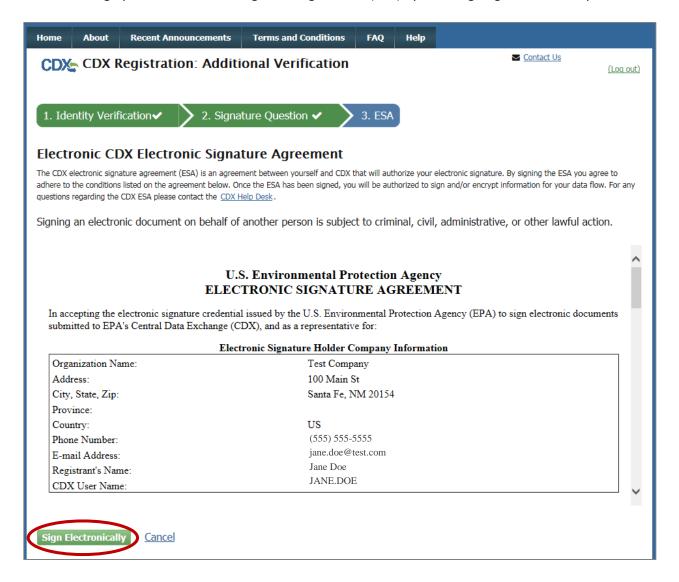
### Step 7: Submit Request to Add an Organization

Enter your organization information and then click "Submit Request for Access."



#### **Step 8: Sign the Electronic Signature Agreement**

Review and sign your CDX electronic signature agreement (ESA) by selecting "Sign Electronically."

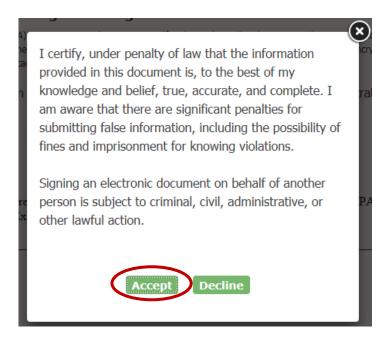


# Why do I Need to Sign Another ESA?

The electronic signature agreement (ESA) is specific to the organization under which you register. Therefore, when you register under a new organization in CDX, you are required to sign and submit a new electronic signature agreement. If you did not previously sign your ESA electronically, you may be required to provide additional verification information or, alternatively, will be required to submit a paper-copy ESA through U.S. Postal Mail.

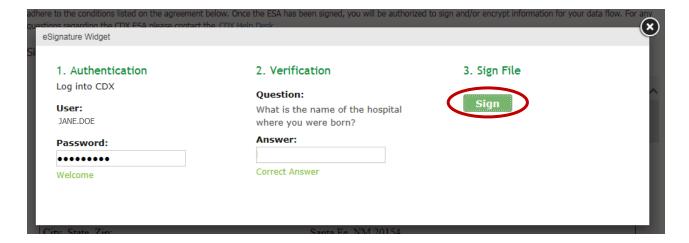
## **Step 9: Certify the Information Provided is Accurate**

Certify that the information provided is correct by clicking "Accept."



#### **Step 8: Authenticate and Verify your Account Information**

Enter your account password, the answer to the security question, and select "Sign."



# Congratulations!

You are now registered under a New Organization.

#### APPENDIX A. PROVIDE EPA WITH YOUR ORGANIZATION ID

The organization you register with and submit data under in CDX is used by the ODS Tracking System to identify the reporting entity of each submission. CDX assigns each organization in its database with a unique 5-7 digit ID. The use of a consistent Organization ID by all individuals that submit reports on behalf of your company is required by EPA. To ensure consistency, EPA requests that all organizations provide EPA with the Organization ID under which they plan to submit data. If your Organization ID changes (due to a change in your organization's name), EPA similarly requests that the organization notify EPA of this change before submission of data under the new Organization ID.

#### **New CDX Users**

For companies that have never before submitted ODS data to EPA through CDX, provide the following information to Mike James (<a href="mailto:james.mike@epa.gov">james.mike@epa.gov</a>) and Emily Golla (<a href="mailto:golla.emily@epa.gov">golla.emily@epa.gov</a>) following registration with the ODS Program in CDX:

Subject: New ODS CDX User

I recently registered under the ODS Program in CDX in anticipation of submitting data on behalf of [Company Name]. My CDX registration information is provided below.

•	Organization Name:
•	Organization ID:

## **Organization Name Changes**

If your company's name changes, provide the following information to Mike James (<a href="mailto:james.mike@epa.gov">james.mike@epa.gov</a>) and Emily Golla (<a href="mailto:golla.emily@epa.gov">golla.emily@epa.gov</a>) following registration with the new Organization Name/ID in CDX:

Subject: ODS Submitter Name Change

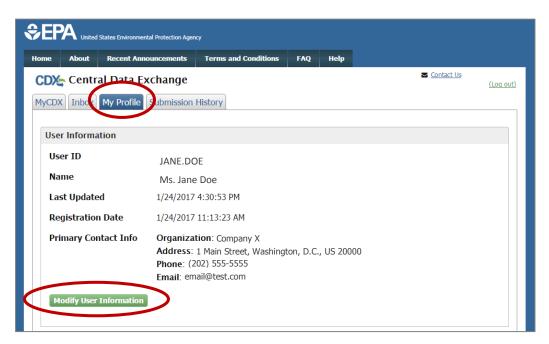
[Company Name] recently underwent a name change that required us to update the organization name/ID used for data submission in CDX. The old and new CDX organization information is provided below.

•	Old Organization Name:
•	Old Organization ID:
•	New Organization Name:
•	New Organization ID:

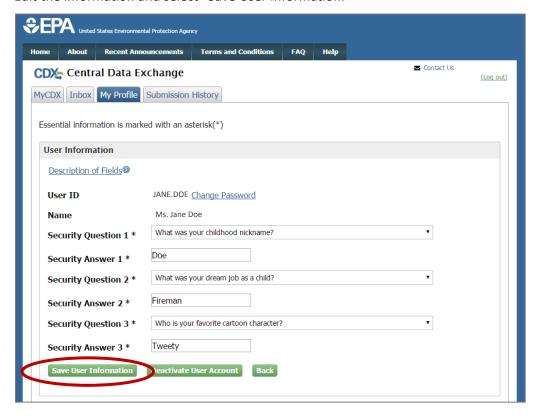
#### APPENDIX B. UPDATE YOUR ACCOUNT INFORMATION

## Edit your account password or your account's security questions

Select "Modify User Information" from the 'My Profile' tab.



Edit the information and select "Save User Information."

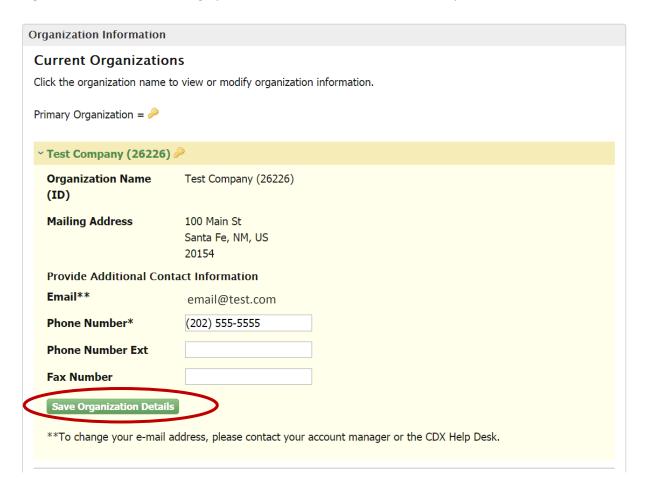


#### Edit your email address, phone number, or fax number

From the 'My Profile' tab, select "Modify Organization Information."



Select the appropriate Organization and edit your phone number or fax number. Select "Save Organization Details." To change your email address, contact the CDX Help Desk.



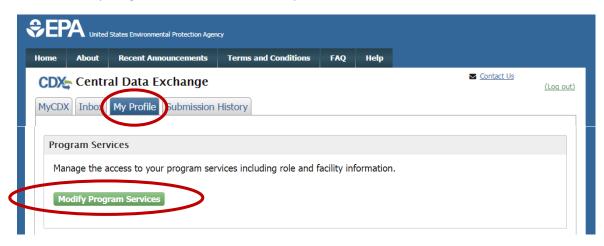
Email addresses, phone numbers, and fax numbers in CDX are tied to the organization under which you are registered. If you are registered under more than one organization in CDX, you may tailor your email address, phone number, and fax number for each organization.

#### APPENDIX C. DEACTIVATING ACCOUNTS

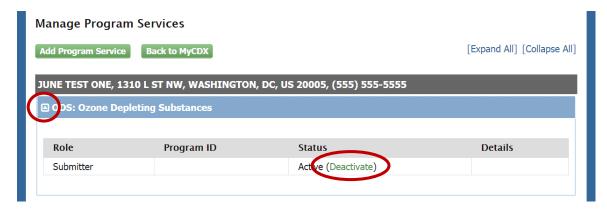
Since all users registered under the same Organization ID have access to the same Submission History table in CDX, it is important to deactivate accounts when individuals leave your organization to ensure they can no longer access your company's ODS submissions. The process for deactivating your own account or an account of a previous employee is described below.

#### Deactivate your own account

Select "Modify Program Services" from the 'My Profile' tab.



Located and expand the account you wish to deactivate, and select 'Deactivate'.



## Deactivate the account of a previous employee

Provide the following information to Mike James (<a href="mailto:james.mike@epa.gov">james.mike@epa.gov</a>) and Emily Golla (<a href="mailto:golla.emily@epa.gov">golla.emily@epa.gov</a>) to request deactivation of an account:

Subject: ODS Account Deactivation Request

[Employee Name] is no longer responsible for submitting ODS reports on behalf of [Company Name]. Please deactivate their CDX account.