Engines and Vehicles – Compliance Information System (EV-CIS)

Electronic Role Sponsorship User Guide

March 2020

Topics

- Part 1: Required Action For All Existing EV-CIS Users Upon 1st Log In After March 6th, 2020
- Part 2: EV-CIS Roles, CAO Functions & Identity Verification
- Part 3: How To Become A CAO
  - Scenario A- New EV-CIS User
  - Scenario B- Existing EV-CIS User
- Part 4: How To Become A Submitter Or CROMERR Signer
  - Scenario A- New EV-CIS User
  - Scenario B- Existing EV-CIS User
- Part 5: Tools for CAOs
- Appendix: General Resources

*Note- Ctrl-Click on a Part # to go to that Part within this presentation

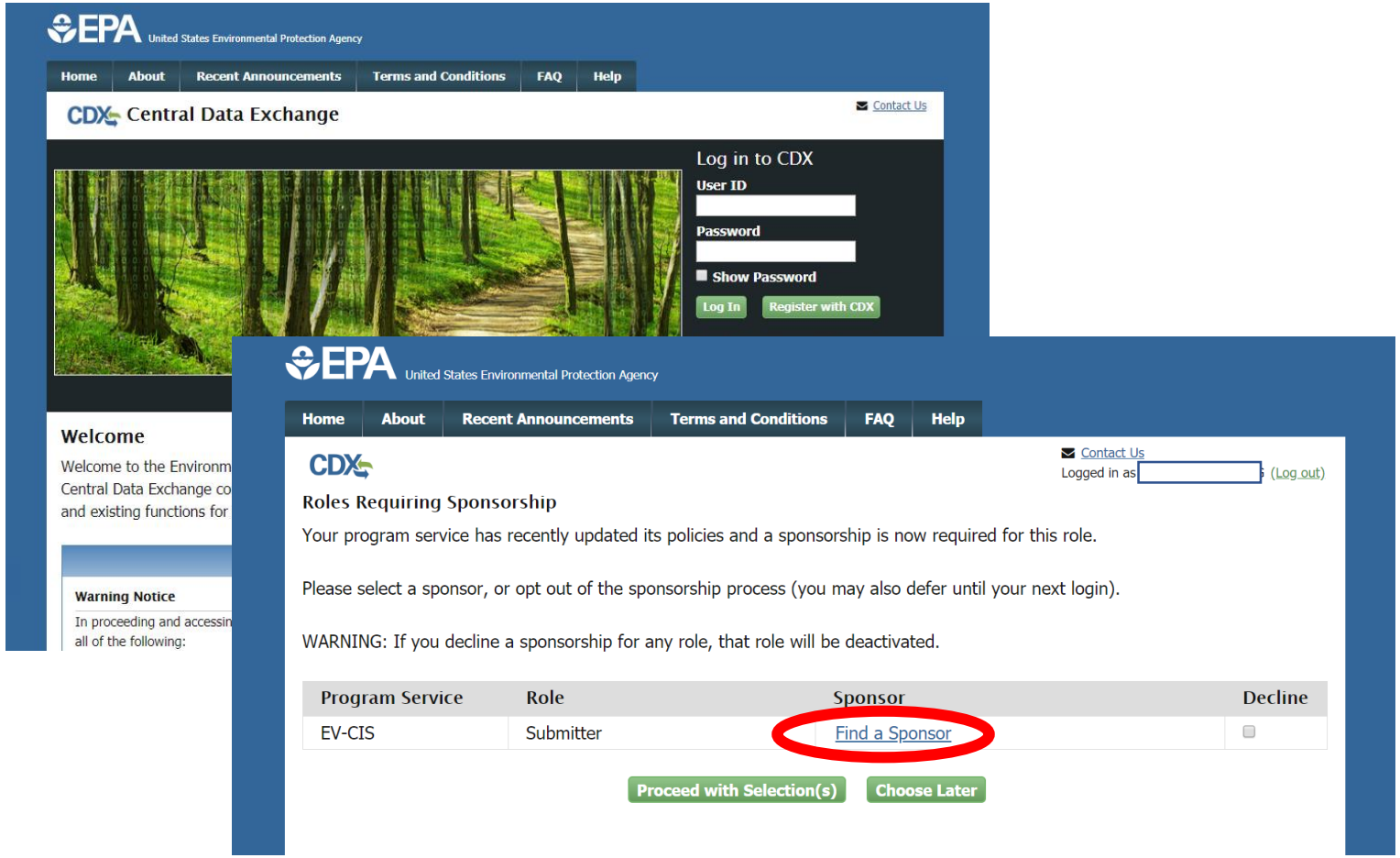
The screenshots in this document are from our test environment. The production screens may vary slightly.

Part 1:
Required Action For All Existing EV-CIS Users Upon 1st Log In After March 6th, 2020

Part 1: Required Action For All Existing EV-CIS Users Upon 1st Log In After 03/06/2020

Associate A CAO With Your CDX Account

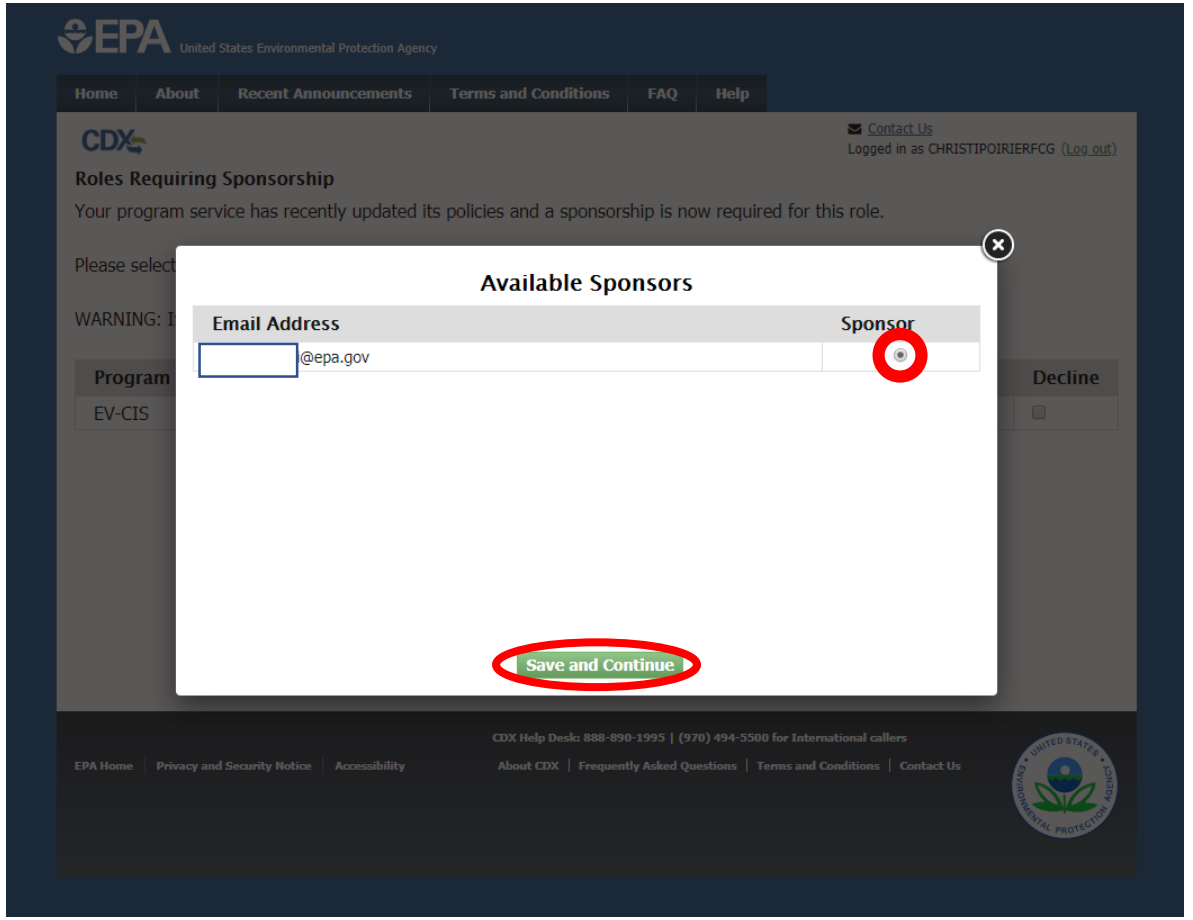
- The first time you log into CDX after March 6th, 2020, you will be prompted to associate a CAO with each of your EV-CIS roles
- Enter your User ID and Password for your CDX account
- Click the “Log In” button
- Click the “Find a Sponsor” link to view all the active CAOs for your Manufacturer Code



Part 1: Required Action For All Existing EV-CIS Users Upon 1st Log In After 03/06/2020

Select CAO Sponsor Email Address

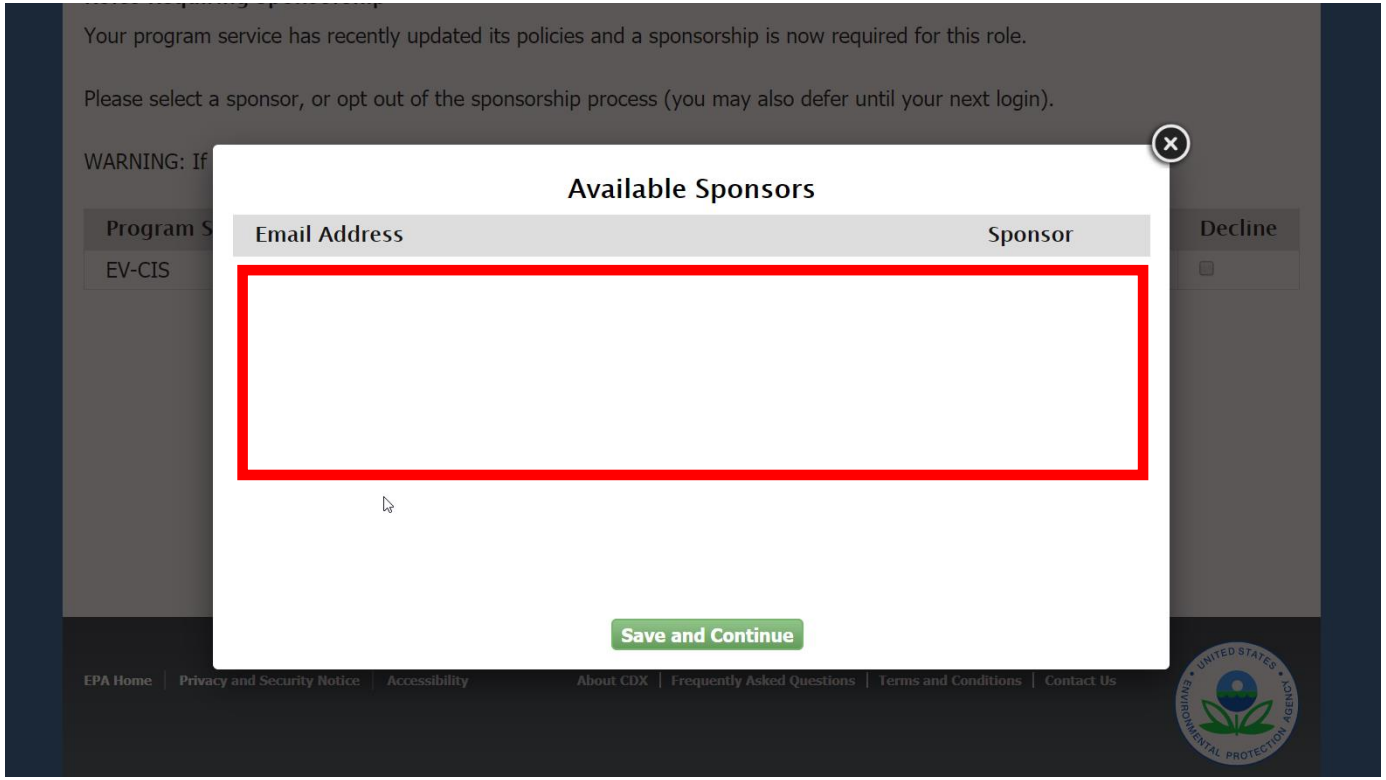
- Select a CAO's Email Address from the list of Available Sponsors
  - It does not matter which sponsor you select and the CAO does not have to take any actions
- Click the "Save and Continue" button



Part 1: Required Action For All Existing EV-CIS Users Upon 1st Log In After 03/06/2020

If No CAO Sponsor Email(s) To Select

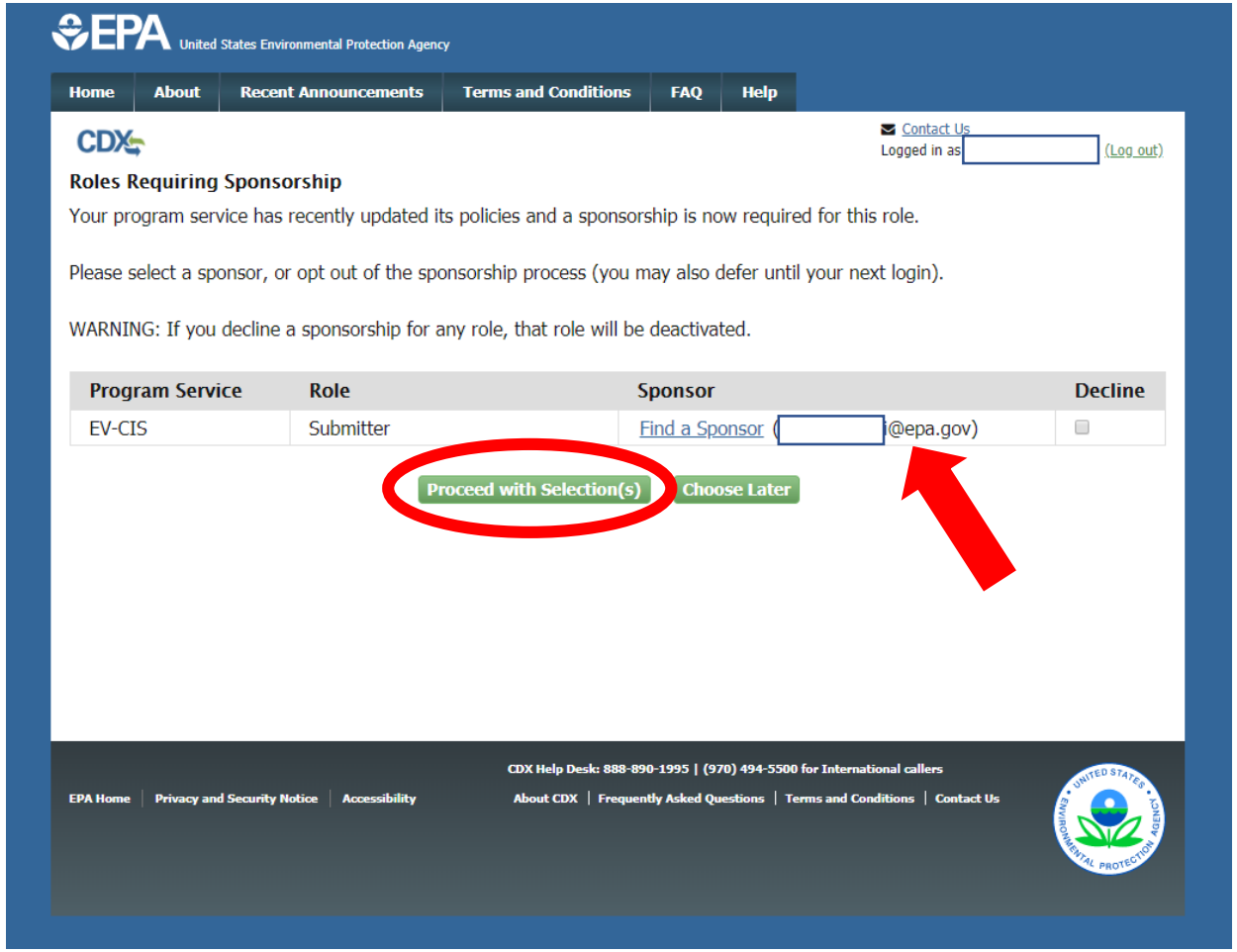
- If there are no email addresses listed in the Available Sponsors pop-up window, it means your company does not have a CAO with an active CDX account.
- A CAO must exist for your manufacturer code before you will be able to access EV-CIS
- For assistance contact verify@epa.gov



Part 1: Required Action For All Existing EV-CIS Users Upon 1st Log In After 03/06/2020

Finalize CAO Sponsor Selection

- The selected CAO's email is displayed after the "Find a Sponsor" link
- If it is correct, click the "Proceed with Selection(s)" button
- You will then be prompted to log back in to your account and should be able to access EV-CIS as normal from your MyCDX page



Part 2:
EV-CIS Roles, CAO Functions & Identity Verification

Part 2: EV-CIS Roles, CAO Functions & Identity Verification

EV-CIS Roles

Role	Description
Company Approving Official (CAO)	Identifies, vouches for, and manages EV-CIS “Submitters” and “CROMERR Signers”
CROMERR Signer	Requests certificates and takes legal responsibility for all the information used as the basis for a request for certificate
Submitter	Submits certification and compliance information for every applicable industry to EV-CIS, not including certificate requests

Part 2: EV-CIS Roles, CAO Functions & Identity Verification

CAO Role

- A CAO may:
  - Sponsor a new EV-CIS user for their Manufacturer Code to get a role of CROMERR Signer or Submitter
  - Add the role of Submitter to a person who is already a CROMERR Signer
  - Add the role of CROMERR Signer to a person who is already a Submitter
  - Revoke any existing user roles
- Any individual may request a new CAO role for themselves
  - A CAO may not request the role of CAO for other users
  - EPA must approve all CAO role requests
- Users must complete Identity Verification to become a CAO

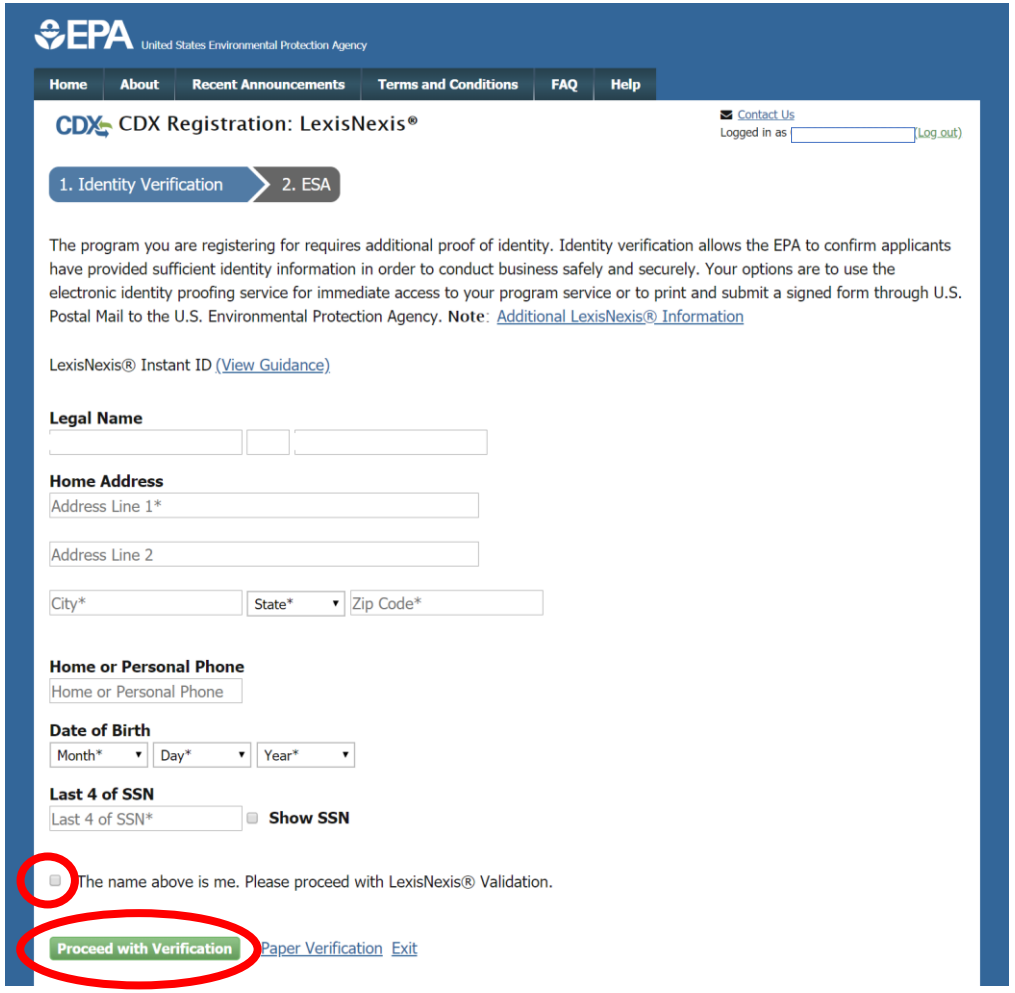
Identity Verification- Overview

- Must only be completed one time when adding either the CAO Role or CROMERR Signer Role
  - Does not need to be repeated if already completed for another role
  - The Submitter Role does not require Identity Verification
- May be performed electronically or by paper process
- It is likely that users from outside the U.S. will have to use the paper identity verification process

Part 2: EV-CIS Roles, CAO Functions & Identity Verification

Identity Verification- Required Information

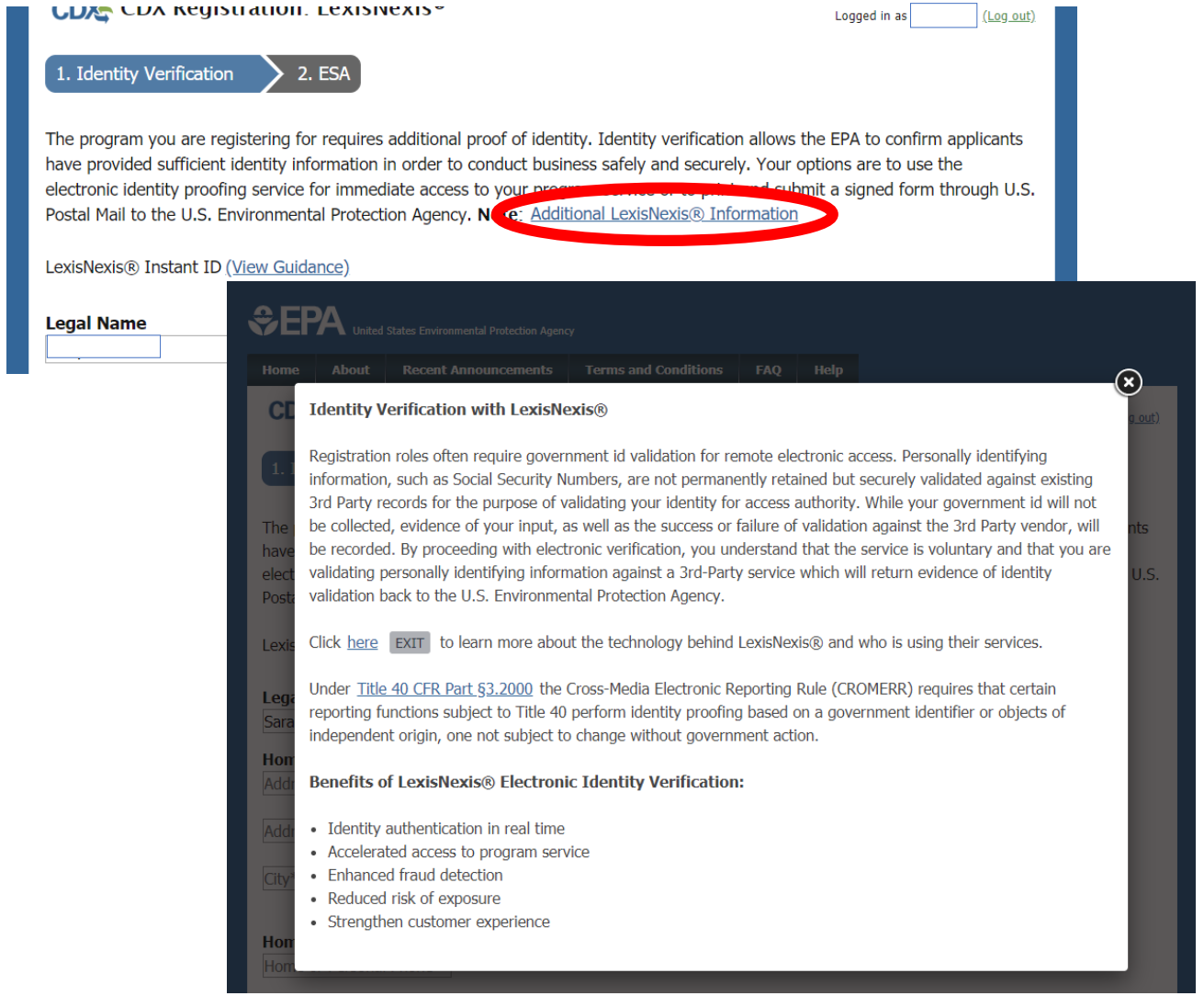
- In order to perform electronic Identity Verification you must provide the following information:
  - Full Name
  - Home Address
  - Personal Phone Number
  - Birthday
  - Last 4 digits of your Social Security Number
- This requires your personal information, not business information
- This information is not stored or shared with EPA



Part 2: EV-CIS Roles, CAO Functions & Identity Verification

Identity Verification- LexisNexis Information

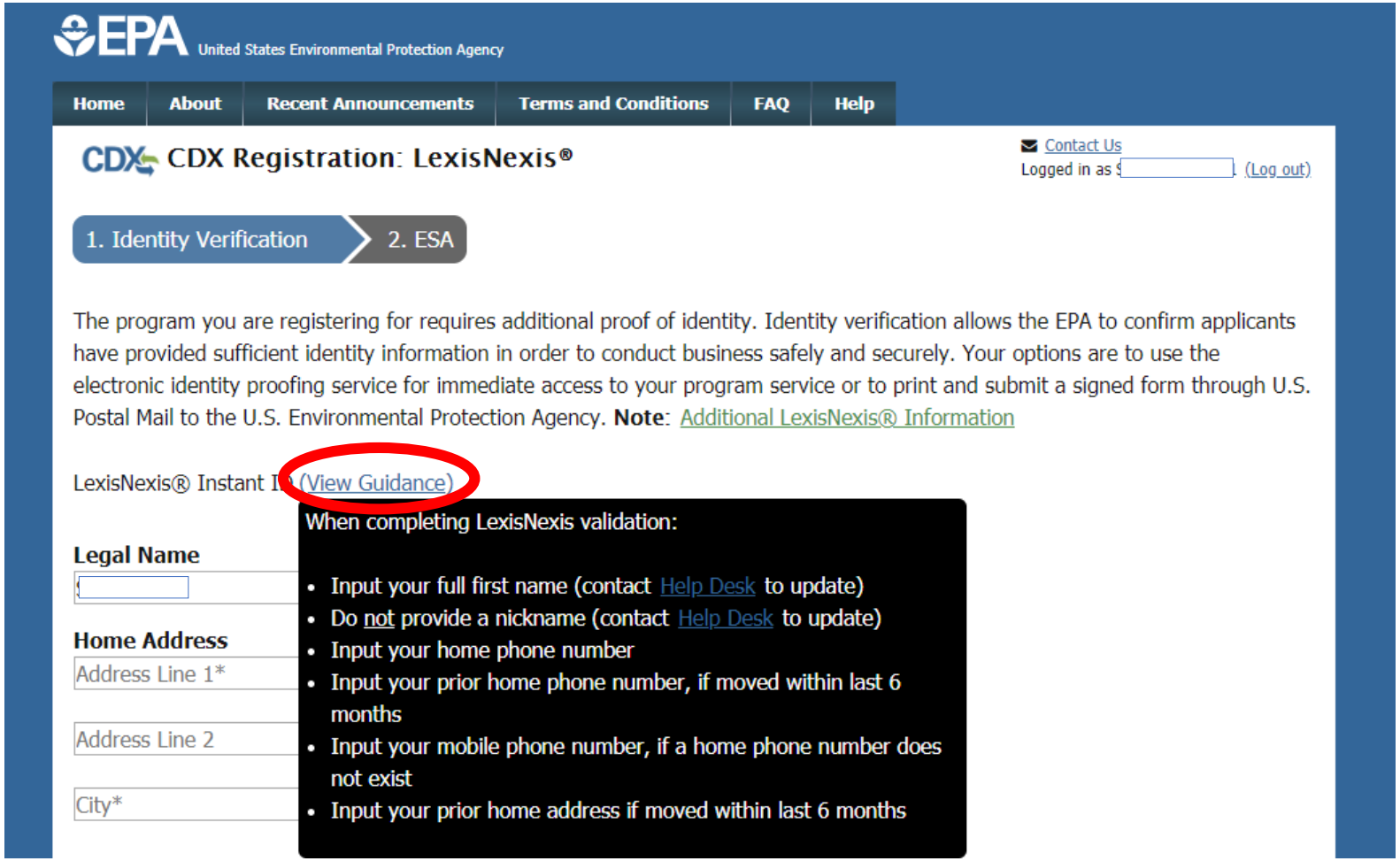
- Click on “Additional LexisNexis Information” Link at the top of the page
- Review additional LexisNexis information in the pop-up window
- Click the “X” icon in upper right corner of the pop-up window to close it and return to the LexisNexis form



Part 2: EV-CIS Roles, CAO Functions & Identity Verification

Identity Verification- LexisNexis Form Guidance

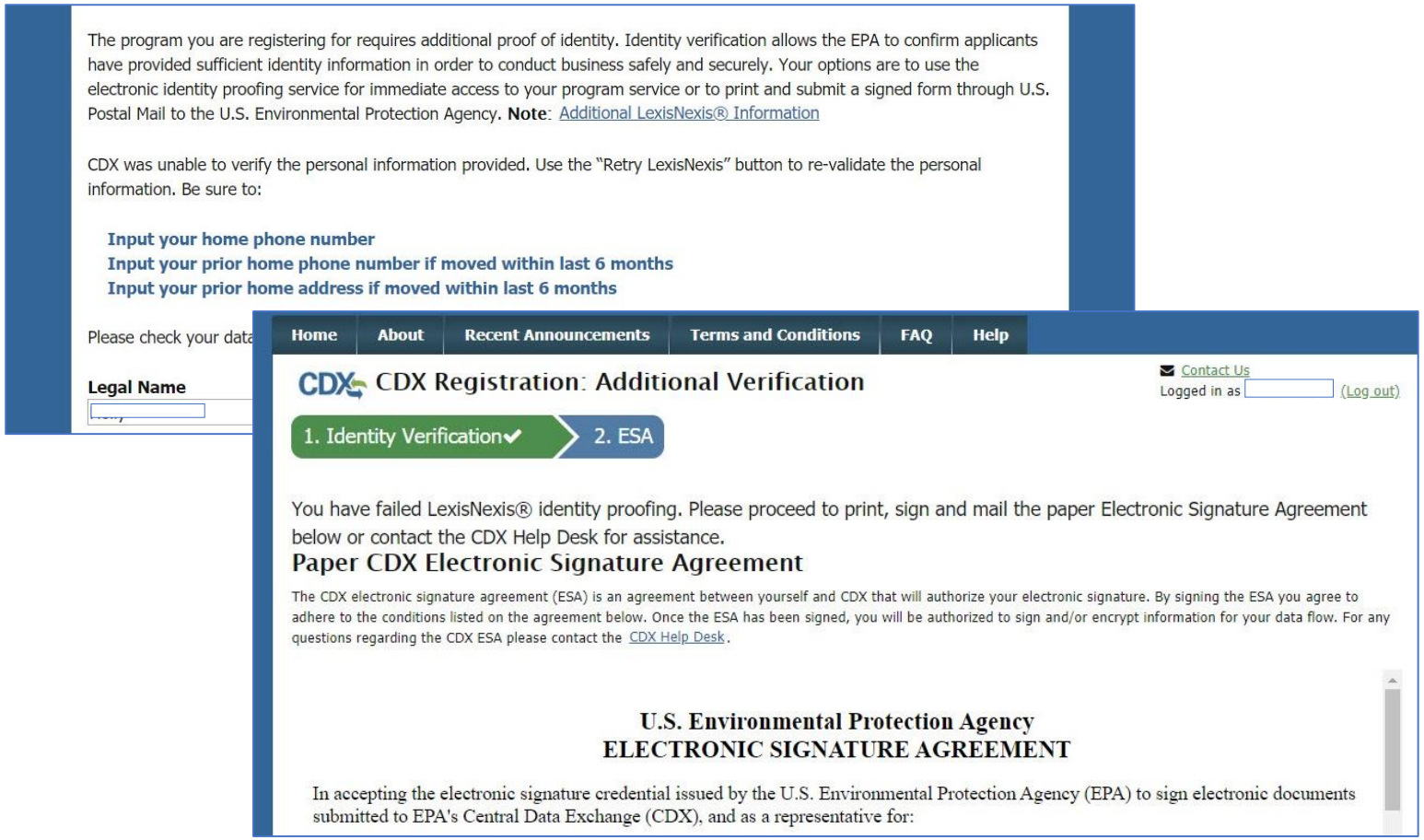
- Hover mouse over the “View Guidance” Link for information about the LexisNexis required fields



Part 2: EV-CIS Roles, CAO Functions & Identity Verification

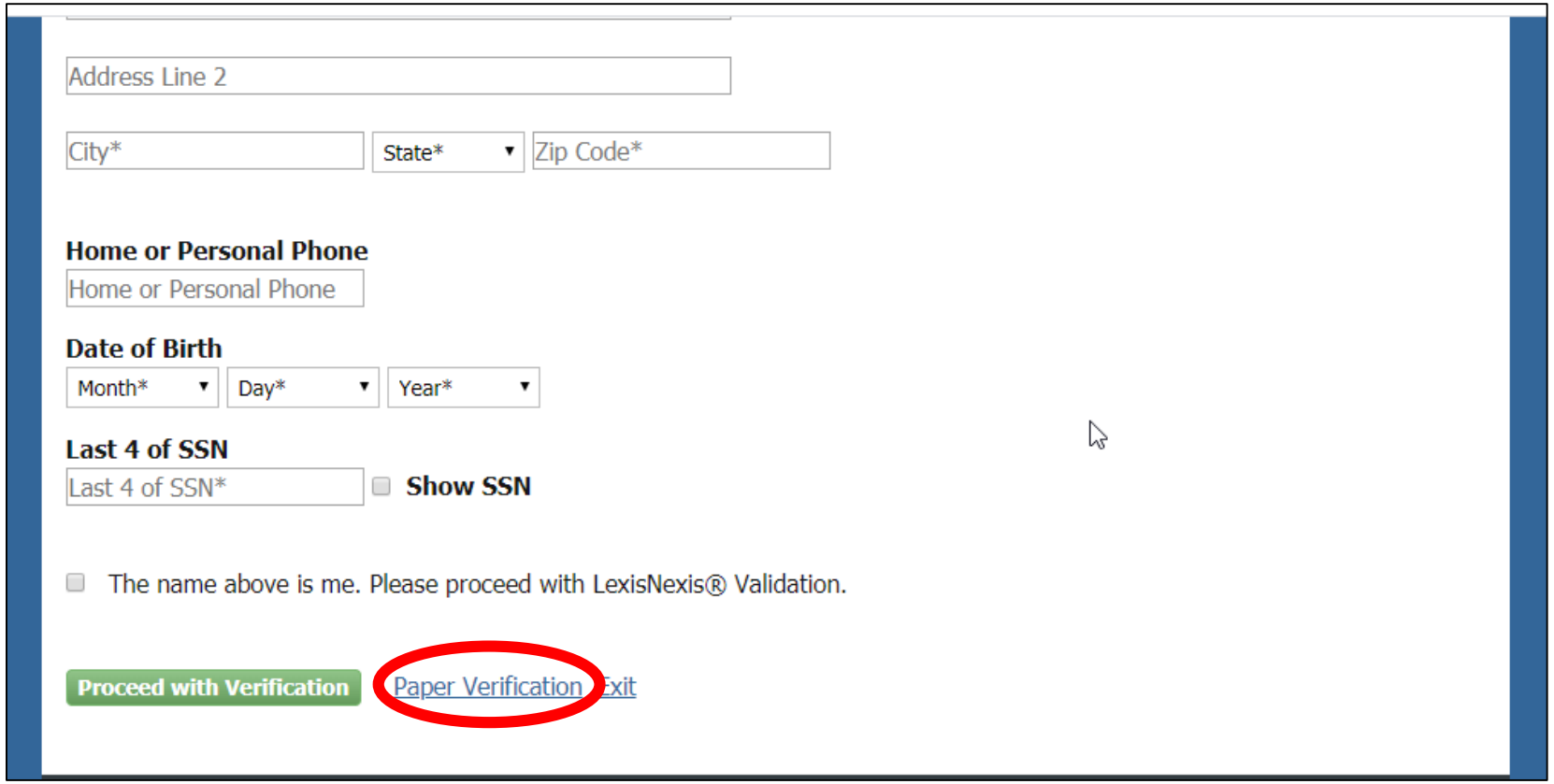
Two Attempts Allowed For Electronic Identity Verification

- If you are unable to complete electronic Identity verification on first attempt, you will be allowed one additional attempt
- If verification again fails on second attempt, then you must complete the paper verification & ESA process



Alternate Paper Verification & ESA Process

- Alternatively, if Sponsored User is unable to, or does not want to, complete electronic identity verification, click the “Paper Verification” link



Part 2: EV-CIS Roles, CAO Functions & Identity Verification

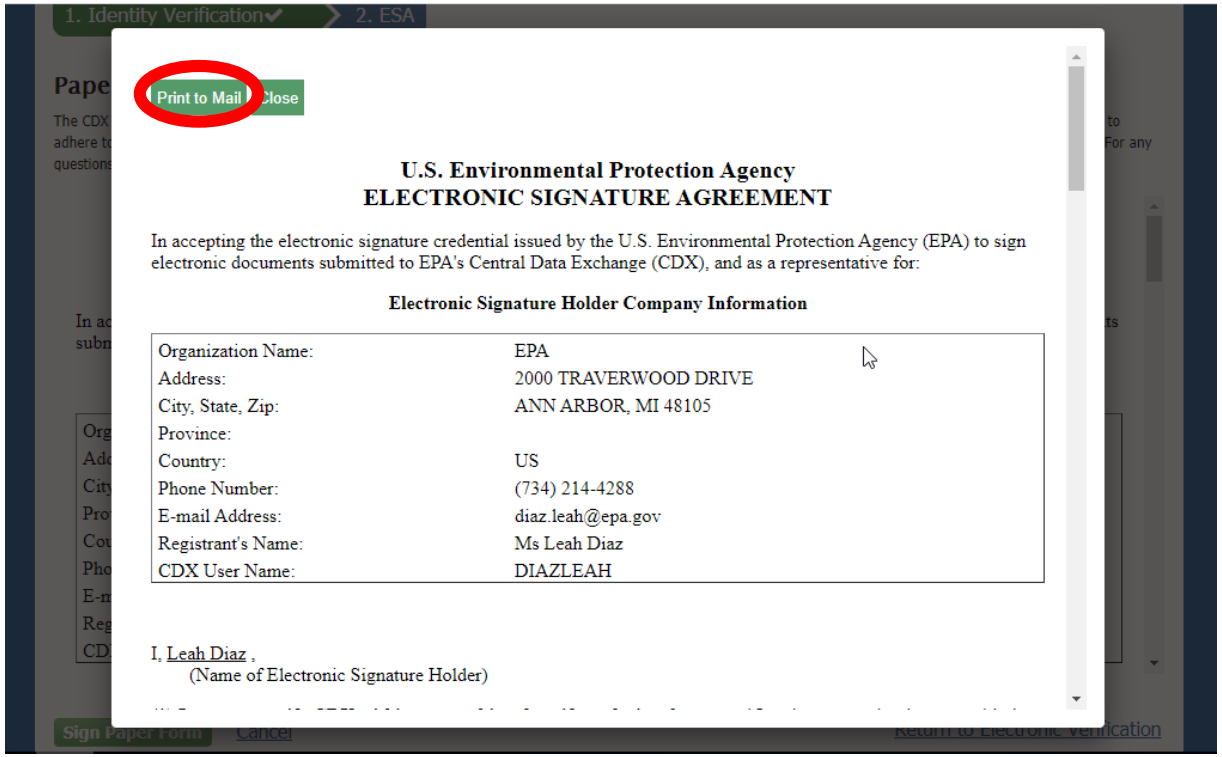
Alternate Paper Verification & ESA Process

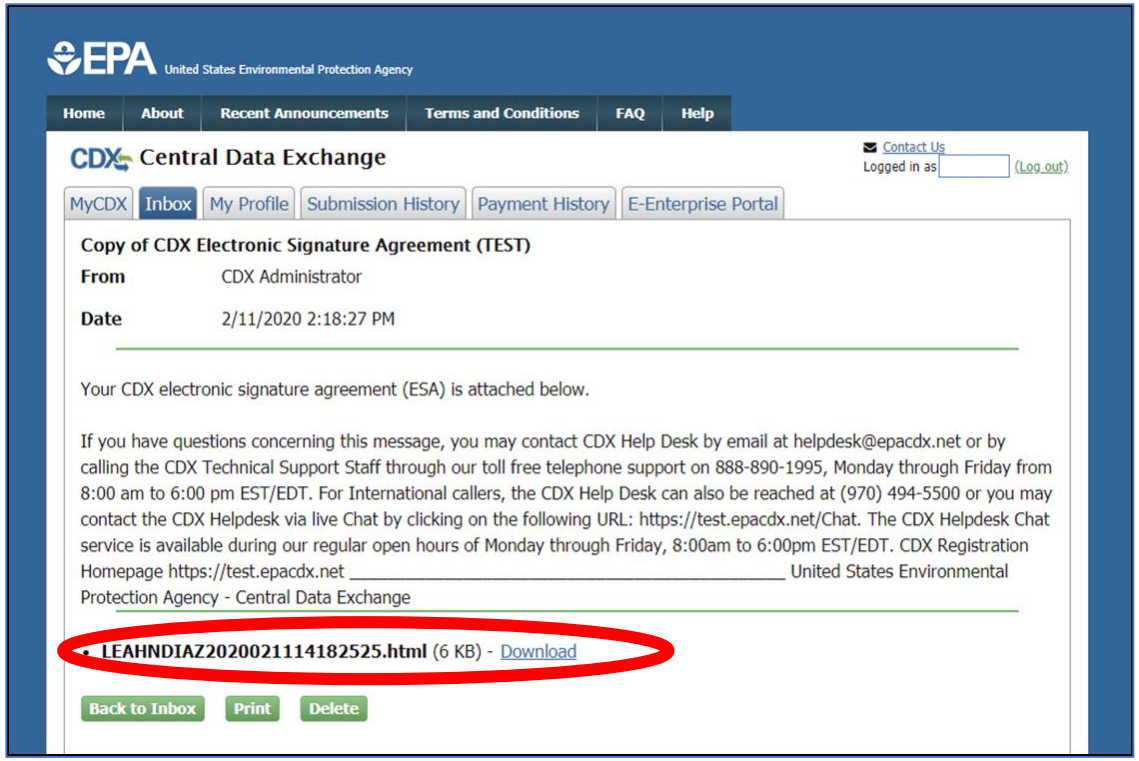
- If choose “Paper Verification”, the ESA will be displayed
- Click “Sign Paper Form” button

Part 2: EV-CIS Roles, CAO Functions & Identity Verification

Alternate Paper Verification & ESA Process

- Click “Print to Mail” button or print copy of ESA from CDX Inbox message
- Send ink-signed ESA to EPA by postal mail





Part 3: How To Become A CAO

Part 3: How To Become A CAO

Two Scenarios

- Part 3 Scenario A: Creating New CDX Account With CAO Role
- Part 3 Scenario B: Adding CAO Role To Existing CDX Account

Part 3 Scenario A:
Creating New CDX Account With CAO Role

Part 3 Scenario A: Creating New CDX Account With CAO Role

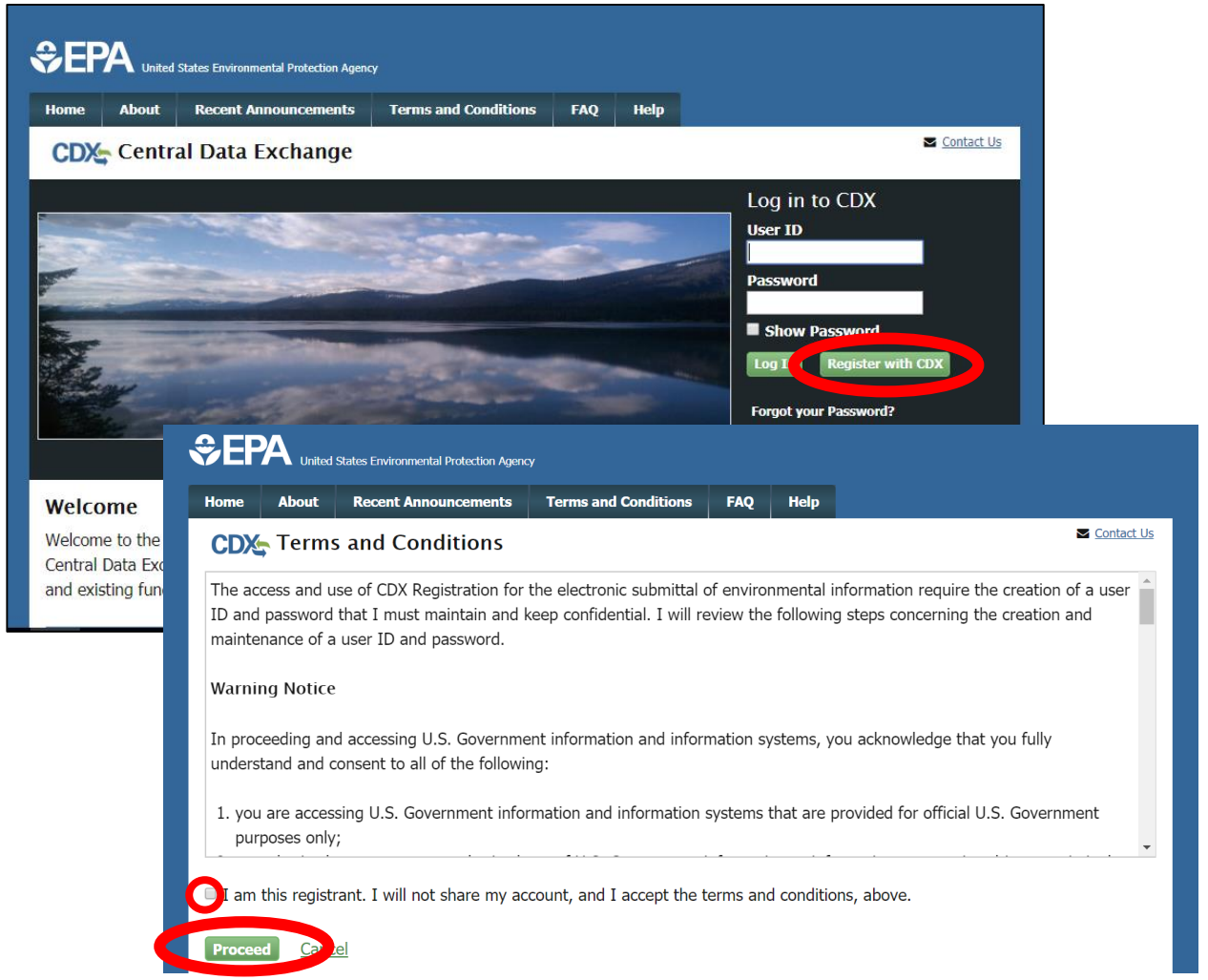
Process Overview

1. Register For New CDX Account
2. Select EV-CIS Program Service
3. Select CAO Role & Manufacturer Code
4. Provide New CDX Account Information
5. Act On CDX Email To Complete Account Registration
6. Provide Information For Identity Verification
7. Select CDX Signature Questions & Provide Answers
8. Review & Sign ESA
9. Electronically Sign ESA
10. Complete CDX Account Registration and CAO Role Request

Part 3 Scenario A: Creating New CDX Account With CAO Role

Register For New CDX Account

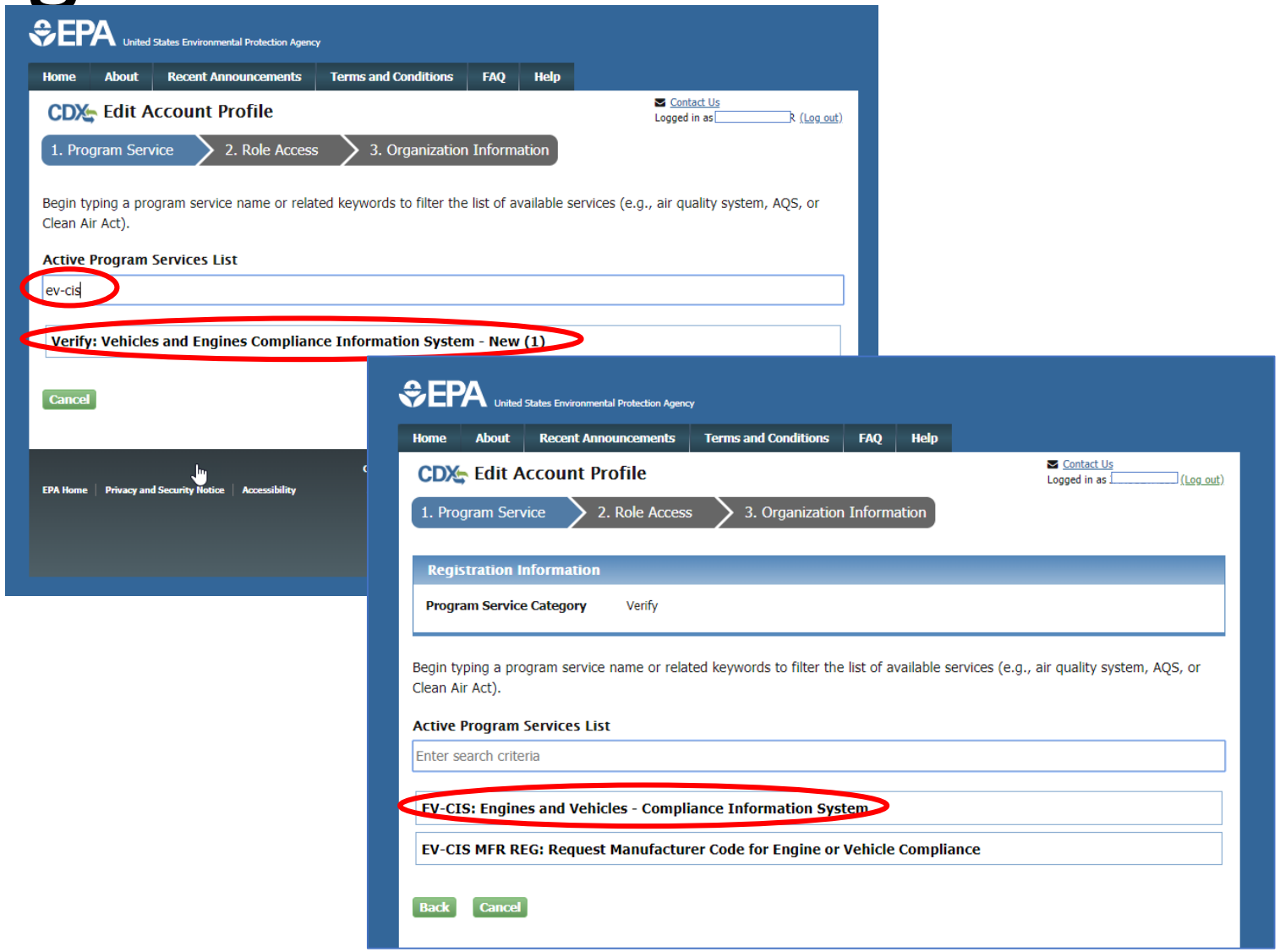
- Click on the "Register with CDX" button to create a new CDX Account
- Check the box next to "I am this registrant…"
- Click the "Proceed" button



Part 3 Scenario A: Creating New CDX Account With CAO Role

Select EV-CIS Program Service

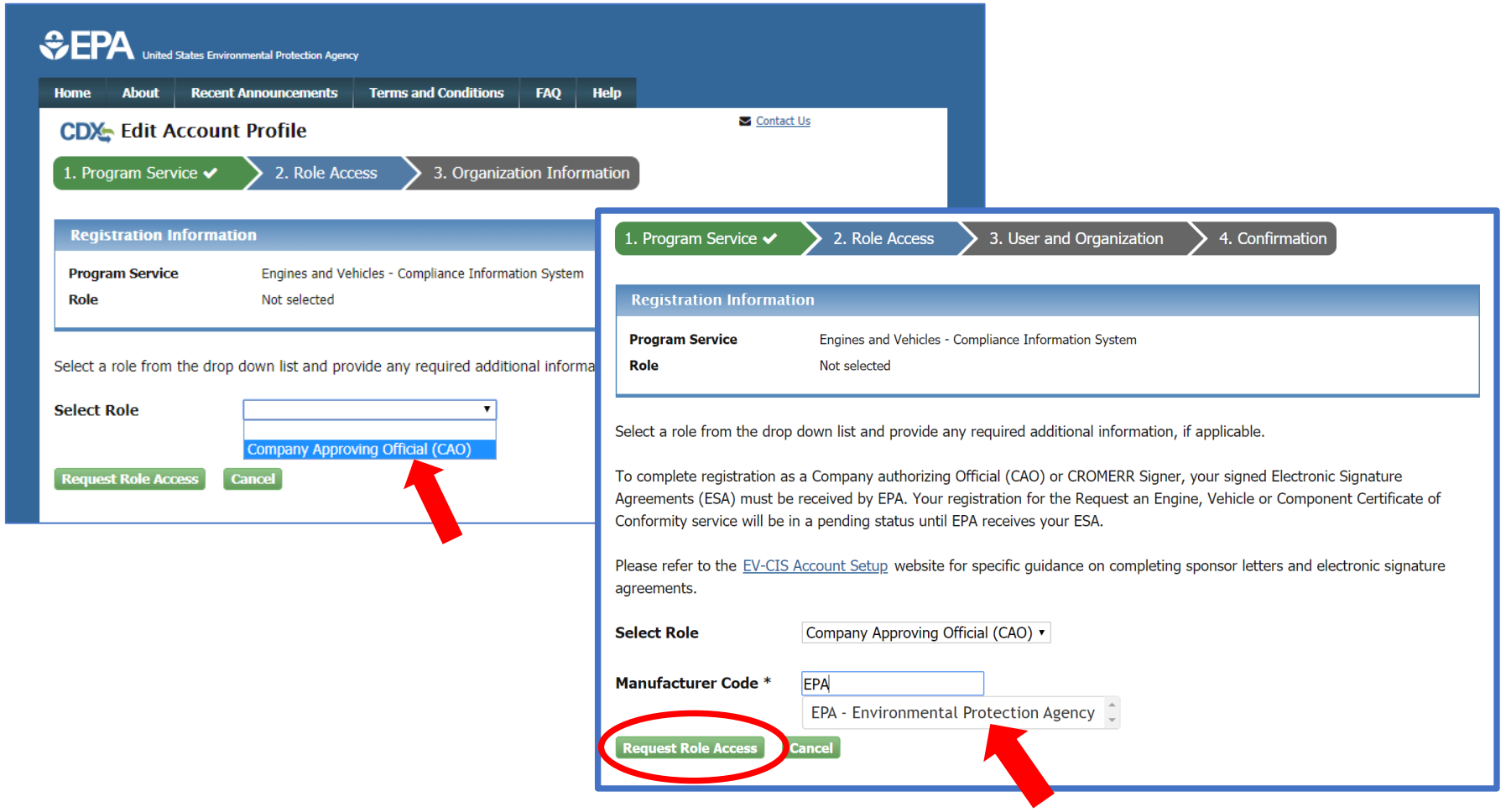
- Type “EV-CIS” to search for the applicable Program Service Category
- Select “Verify: Vehicles and Engines Compliance Information System – New (1)” for the Program Service Category to display two options
- Select “EV-CIS: Engines and Vehicles – Compliance Information System” for Program Service



Part 3 Scenario A: Creating New CDX Account With CAO Role

Select CAO Role & Manufacturer Code

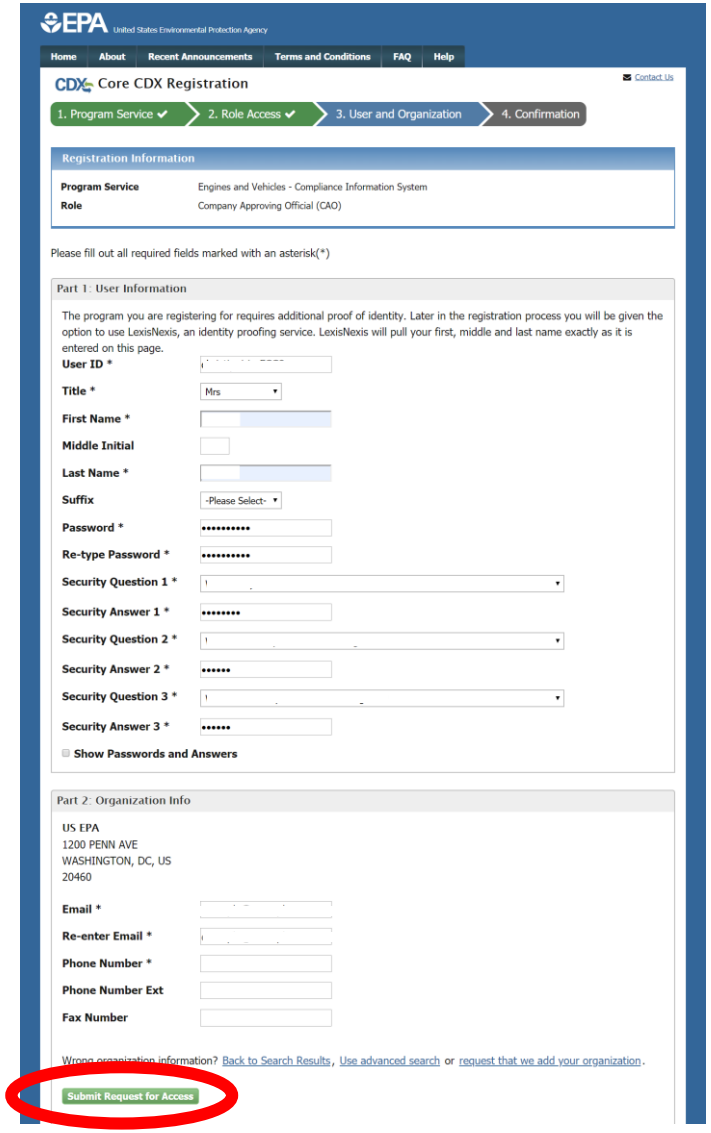
- Select “Company Authorizing Official (CAO)” from the Role dropdown
- Type your Manufacturer Code
- Select the value that is displayed for Manufacturer Code
- Click the “Request Role Access” button



Part 3 Scenario A: Creating New CDX Account With CAO Role

Provide New CDX Account Information

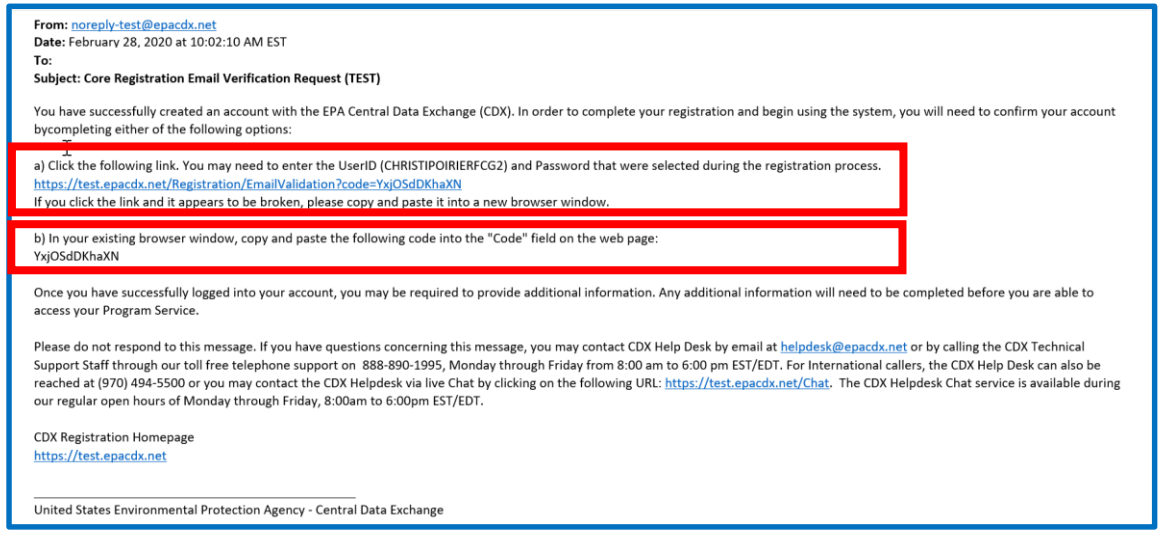
- Provide User Information
- Create a password
- Provide security questions & answers
- Type your company name and click “Search” button
- Select the correct Organization ID from the list
- Provide your business email address & phone number
- Click the “Submit Request for Access” button
- Wait for email from CDX to complete account registration



Part 3 Scenario A: Creating New CDX Account With CAO Role

Act On CDX Email To Complete Registration

- Perform one of two options:
  - Click the link in email you receive from CDX which will open CDX so you can perform the Identity Verification process or
  - Enter the code from that same CDX email on the web page that appeared after you clicked the “Submit Request For Access” button from the previous slide and then click on the “Create Account” button



From: noreply-test@epacdx.net
Date: February 28, 2020 at 10:02:10 AM EST
To:
Subject: Core Registration Email Verification Request (TEST)

You have successfully created an account with the EPA Central Data Exchange (CDX). In order to complete your registration and begin using the system, you will need to confirm your account bycompleting either of the following options:

a) Click the following link. You may need to enter the UserID (CHRISTIPOIRIERFCG2) and Password that were selected during the registration process.
https://test.epacdx.net/Registration/EmailValidation?code=YxjOSdDKhaXN
If you click the link and it appears to be broken, please copy and paste it into a new browser window.

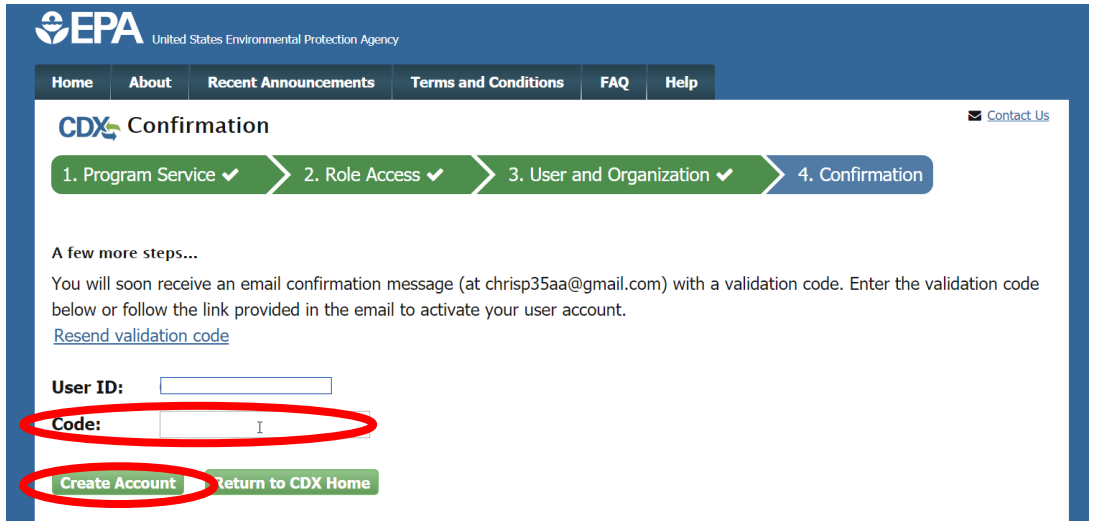
b) In your existing browser window, copy and paste the following code into the "Code" field on the web page:
YxjOSdDKhaXN

Once you have successfully logged into your account, you may be required to provide additional information. Any additional information will need to be completed before you are able to access your Program Service.

Please do not respond to this message. If you have questions concerning this message, you may contact CDX Help Desk by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995, Monday through Friday from 8:00 am to 6:00 pm EST/EDT. For International callers, the CDX Help Desk can also be reached at (970) 494-5500 or you may contact the CDX Helpdesk via live Chat by clicking on the following URL: https://test.epacdx.net/Chat. The CDX Helpdesk Chat service is available during our regular open hours of Monday through Friday, 8:00am to 6:00pm EST/EDT.

CDX Registration Homepage
https://test.epacdx.net

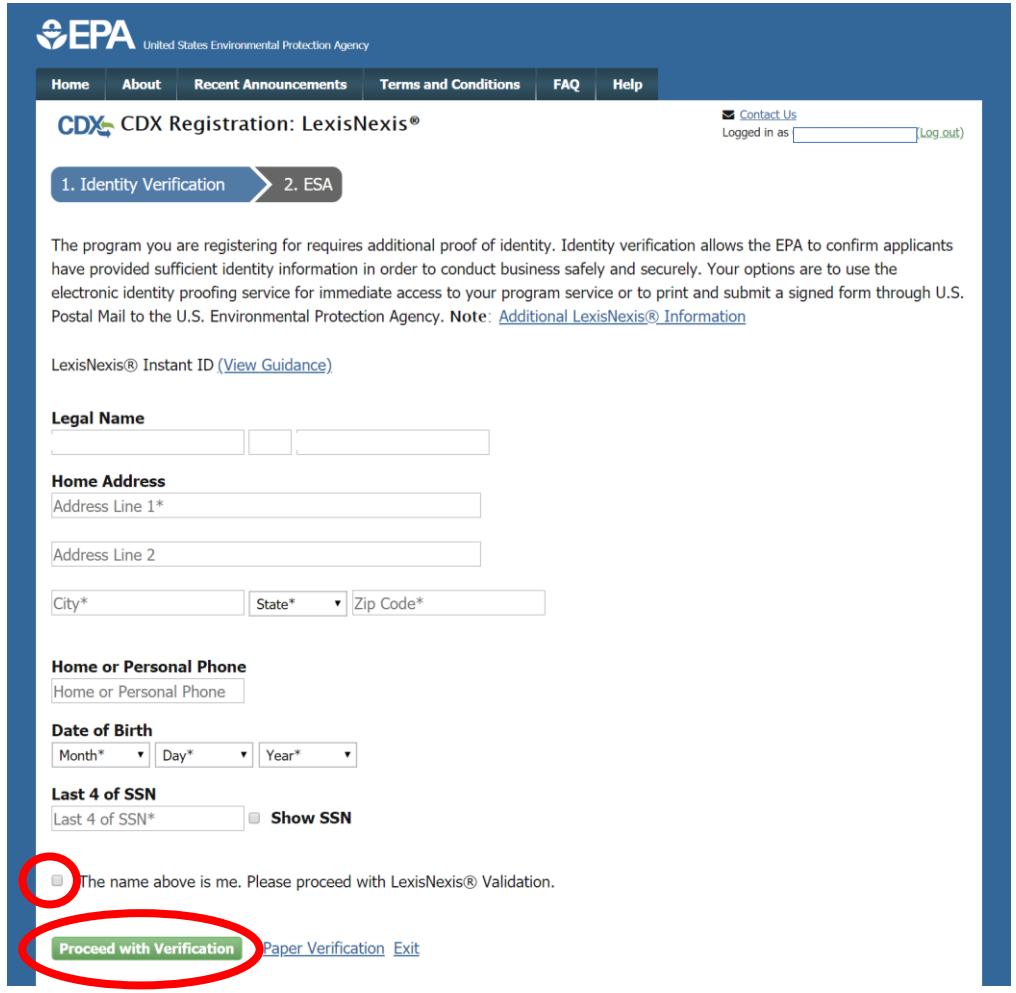
United States Environmental Protection Agency - Central Data Exchange



Part 3 Scenario A: Creating New CDX Account With CAO Role

Provide Information For Identity Verification

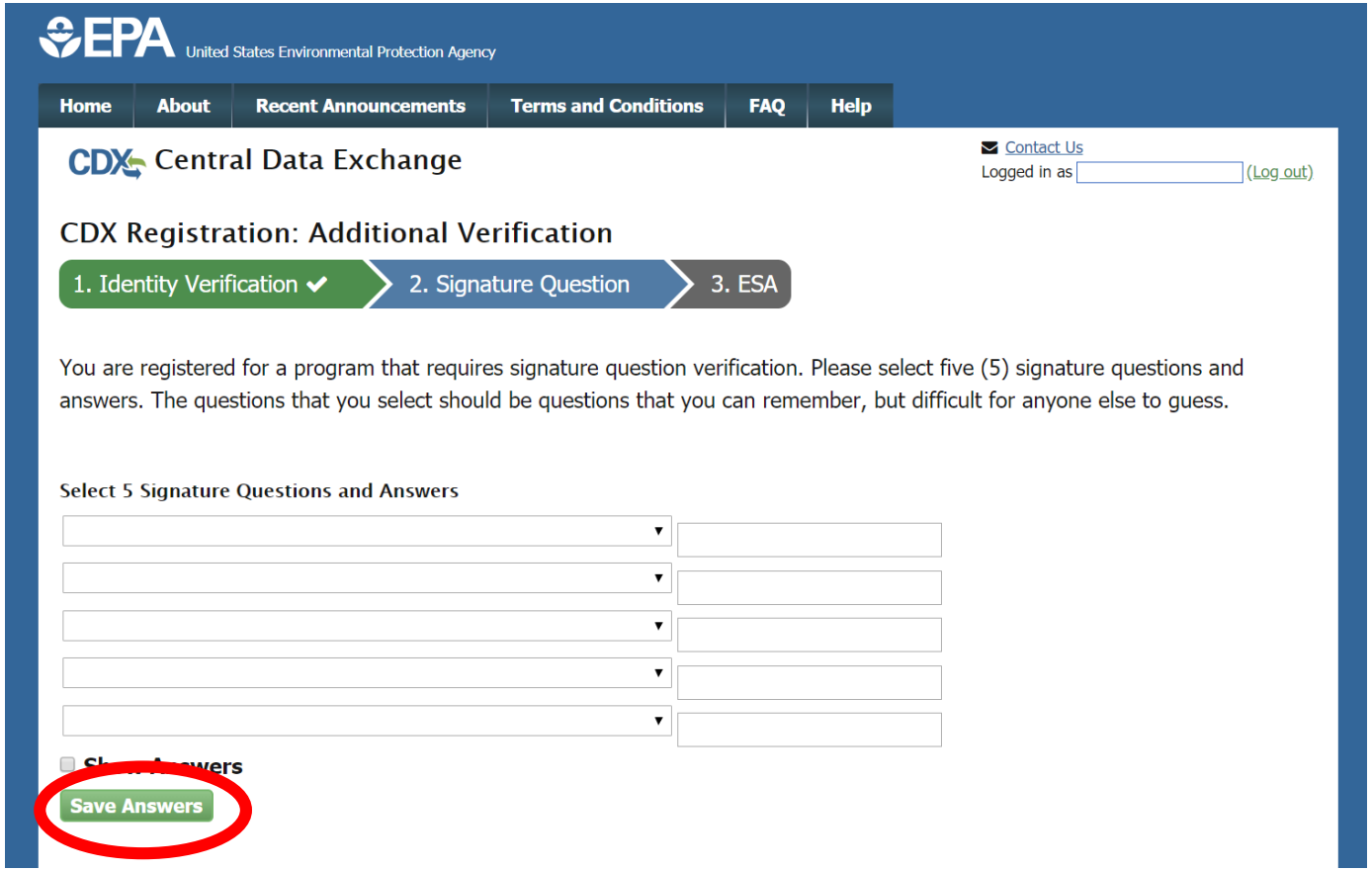
- You will now be prompted to begin the Identity Verification process
- Review/Provide your:
  - Full Name
  - Home Address
  - Personal Phone Number
  - Birthday
  - Last 4 digits of your Social Security Number
- Check the box next to “The name above is me. Please proceed with LexisNexis Validation.”
- Click the “Proceed with Verification” button to complete electronic identity verification
  - Or alternatively click on the “Paper Verification” link (see Part 2 for more information)



Part 3 Scenario A: Creating New CDX Account with CAO Role

Select Signature Questions & Answers

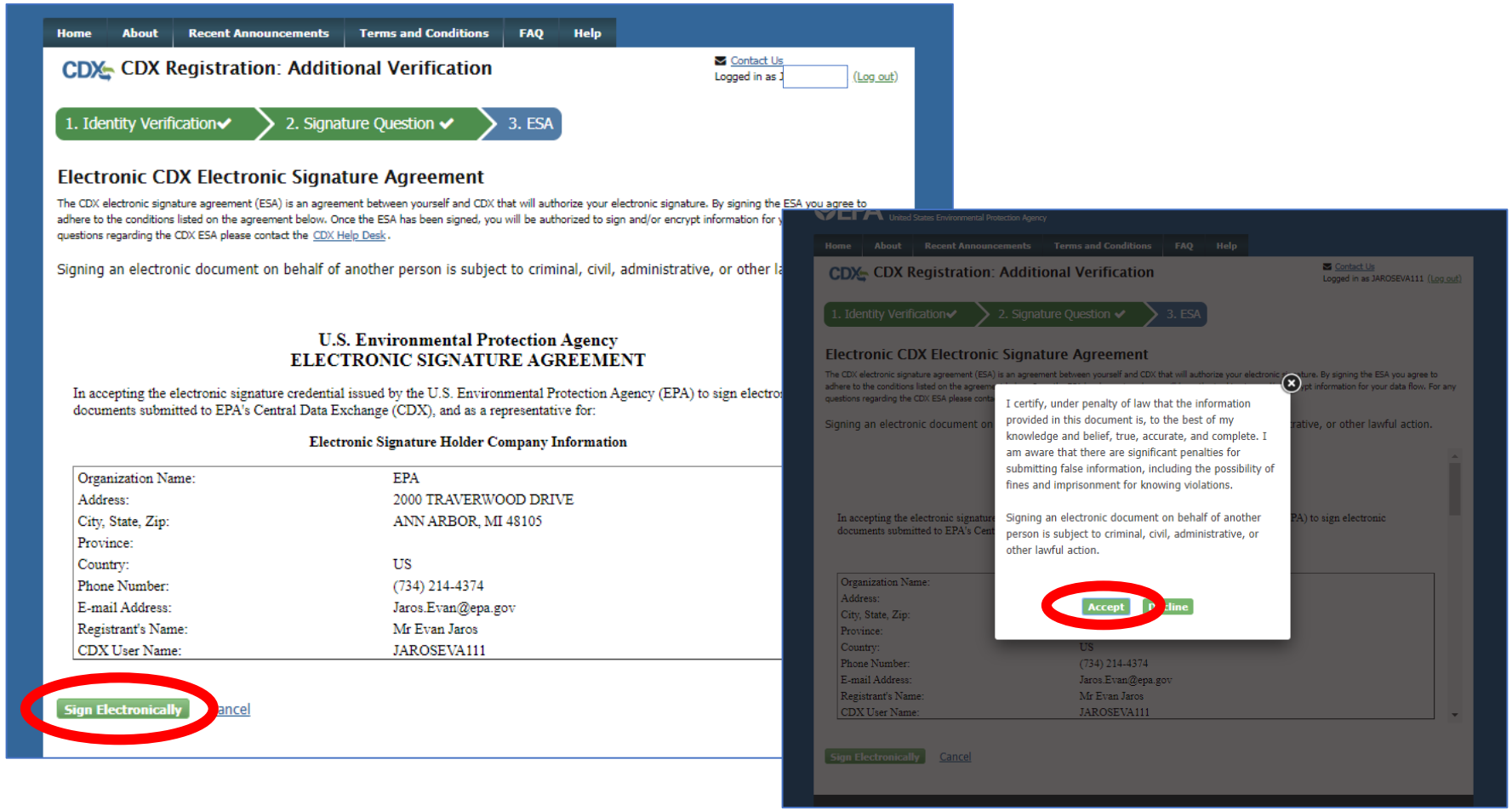
- If your electronic identity verification was successfully completed, you will now be prompted to select 5 signature questions and answers
- Click the “Save Answers” button when complete



Part 3 Scenario A: Creating New CDX Account with CAO Role

Review & Sign ESA

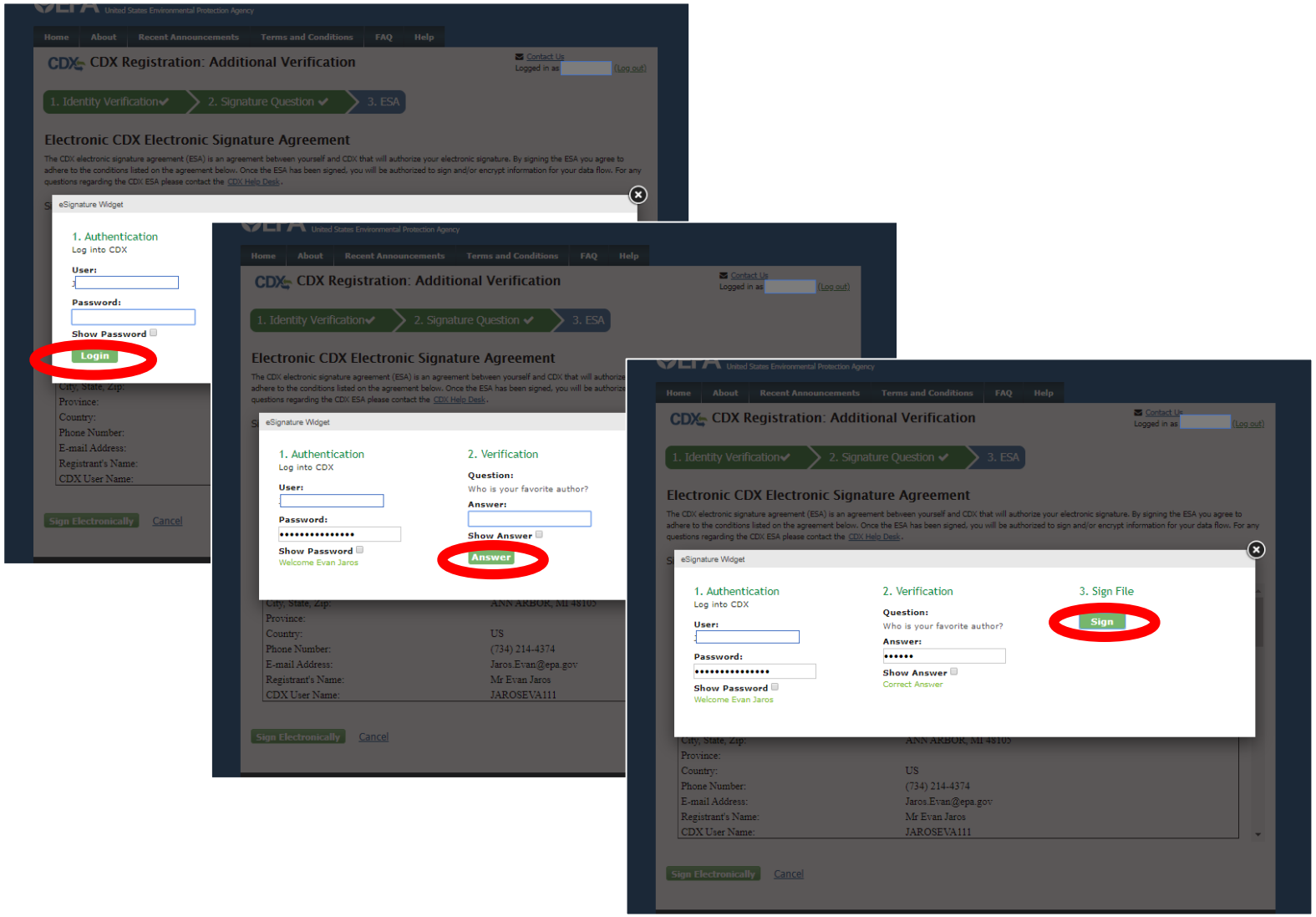
- Review Electronic Signature Agreement (ESA)
- Click the “Sign Electronically” button
- Review and click the “Accept” button in the pop-up window



Part 3 Scenario A: Creating New CDX Account with CAO Role

Electronically Sign ESA

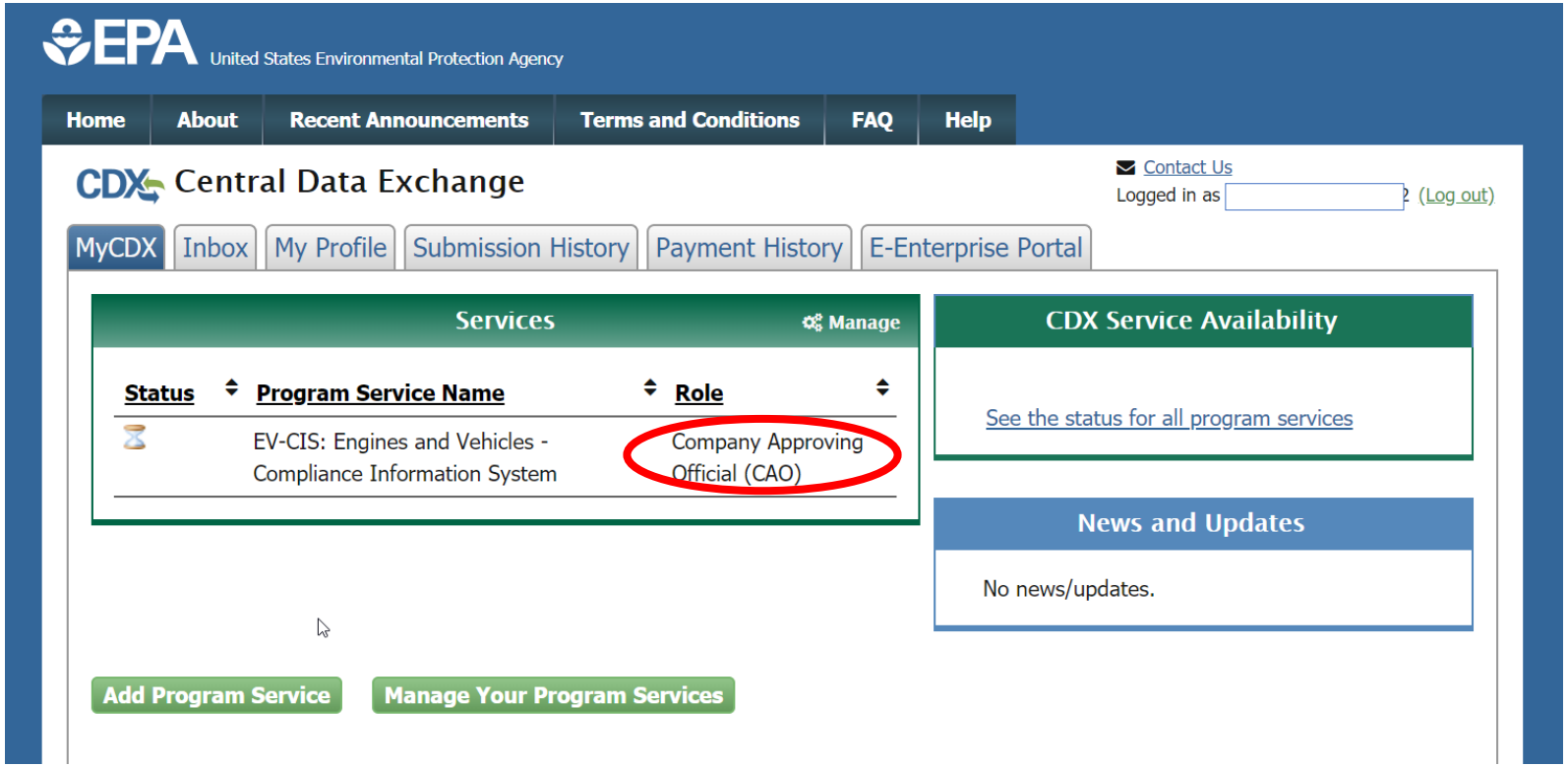
- Complete 3-step electronic signature process in order to Sign ESA
  - Enter Account Password
  - Provide Answer for Signature Question
  - Click the “Sign” button



Part 3 Scenario A: Creating New CDX Account with CAO Role

Complete Registration & CAO Role Request

- After successfully completing the account registration and request for CAO role process, you will be returned to your MyCDX page that shows the new CAO role which is not yet active
- As soon as EPA approves your new CAO role, it will be activated and you will receive a confirmation email



Part 3 Scenario B:
Adding CAO Role To Existing CDX Account

Part 3 Scenario B: Adding CAO Role To Existing CDX Account

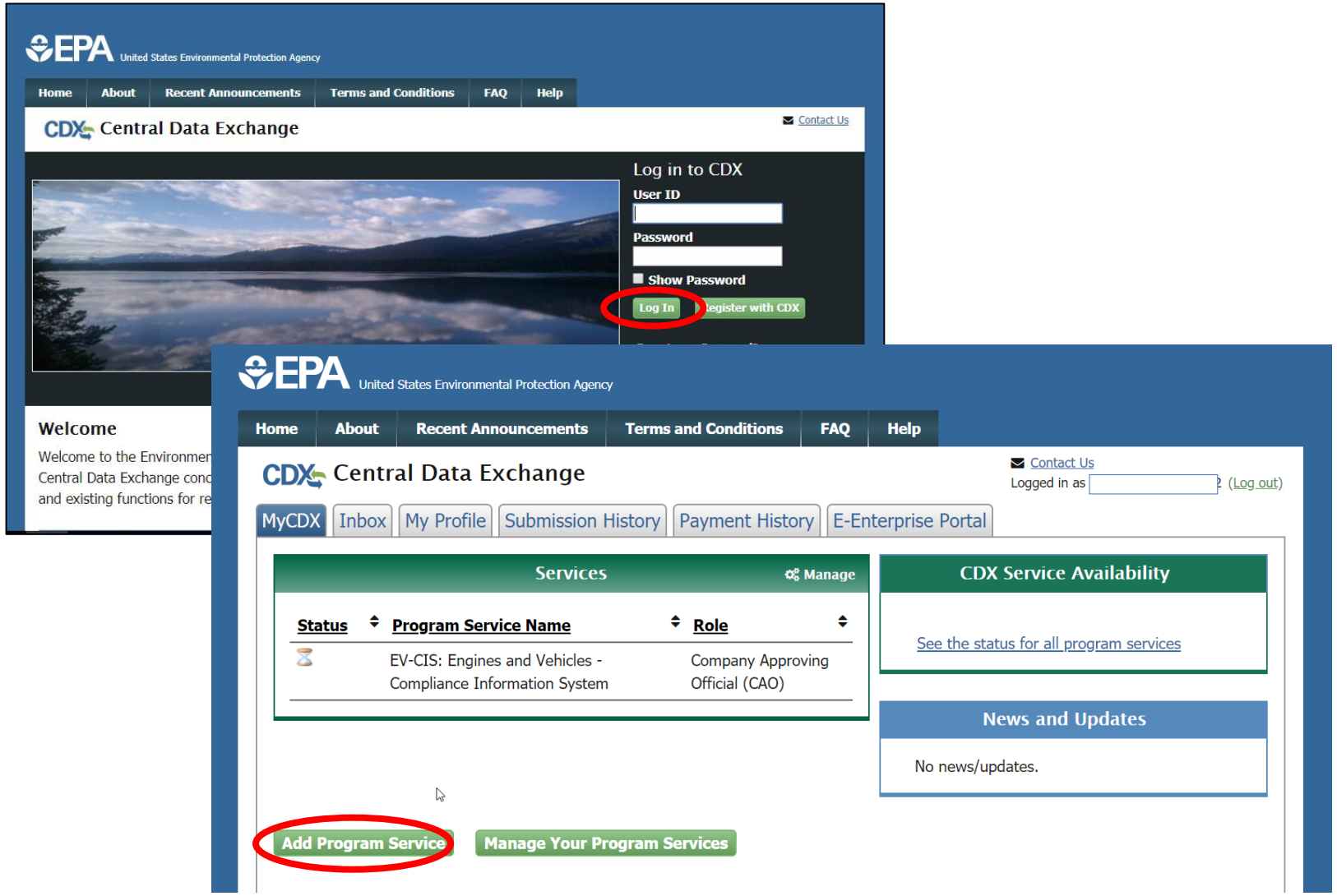
Process Overview

1. Log In To Existing CDX Account
2. Click Add Program Service
3. Select EV-CIS Program Service
4. Select CAO Role & Provide Manufacturer Code
5. Select Organization
6. Provide Information Needed for Identity Verification (Unless already CROMER Signer)
7. Select 5 Signature Questions & Provide Answers
8. Review & Electronically Sign ESA
9. Submit Request For New CAO Role For EPA Approval

Part 3 Scenario B: Adding CAO Role To Existing CDX Account

Log In & Click Add Program Service

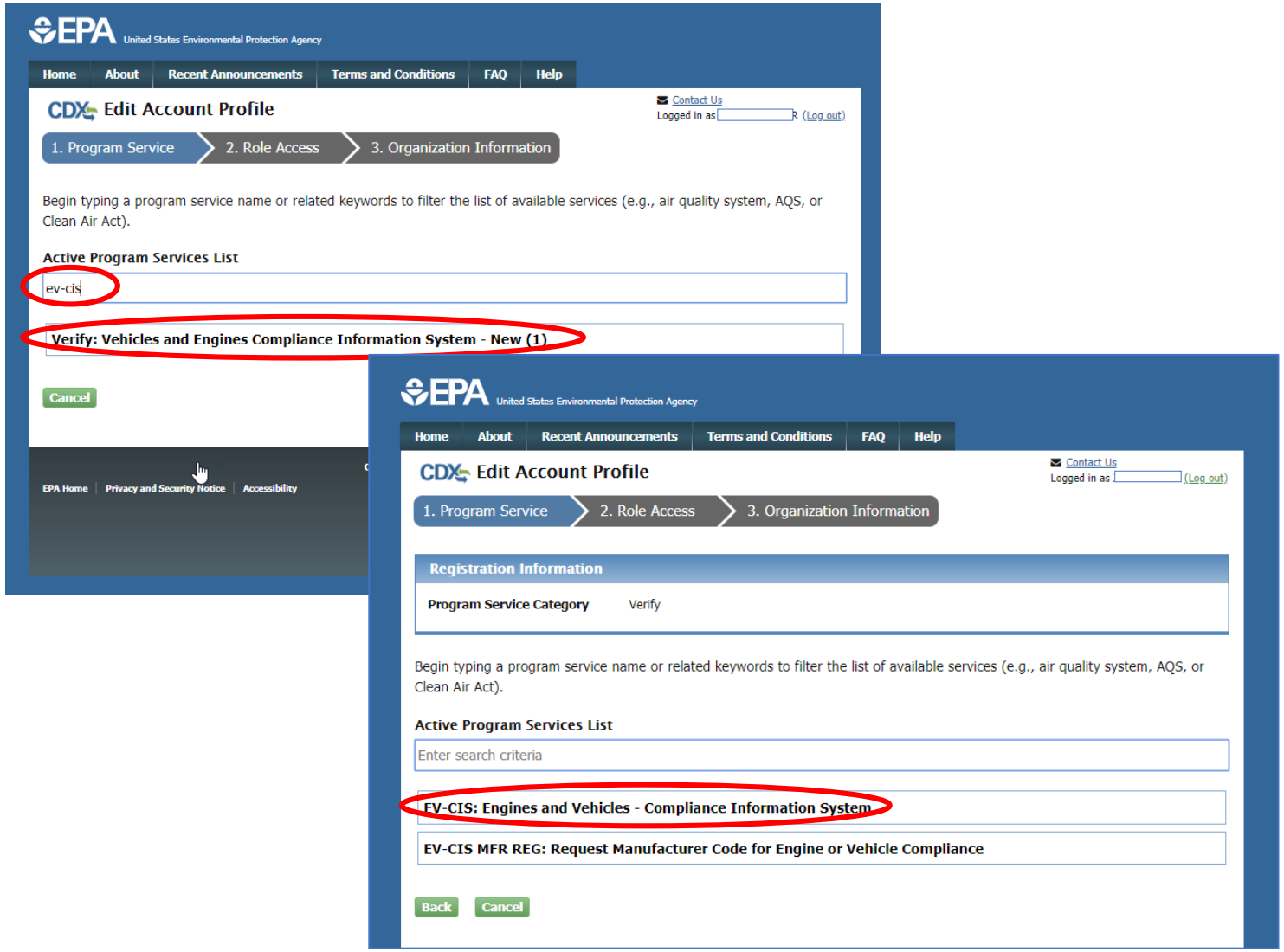
- Log in to your existing CDX Account
- Click on the "Add Program Service" button



Part 3 Scenario B: Adding CAO Role To Existing CDX Account

Select EV-CIS Program Service

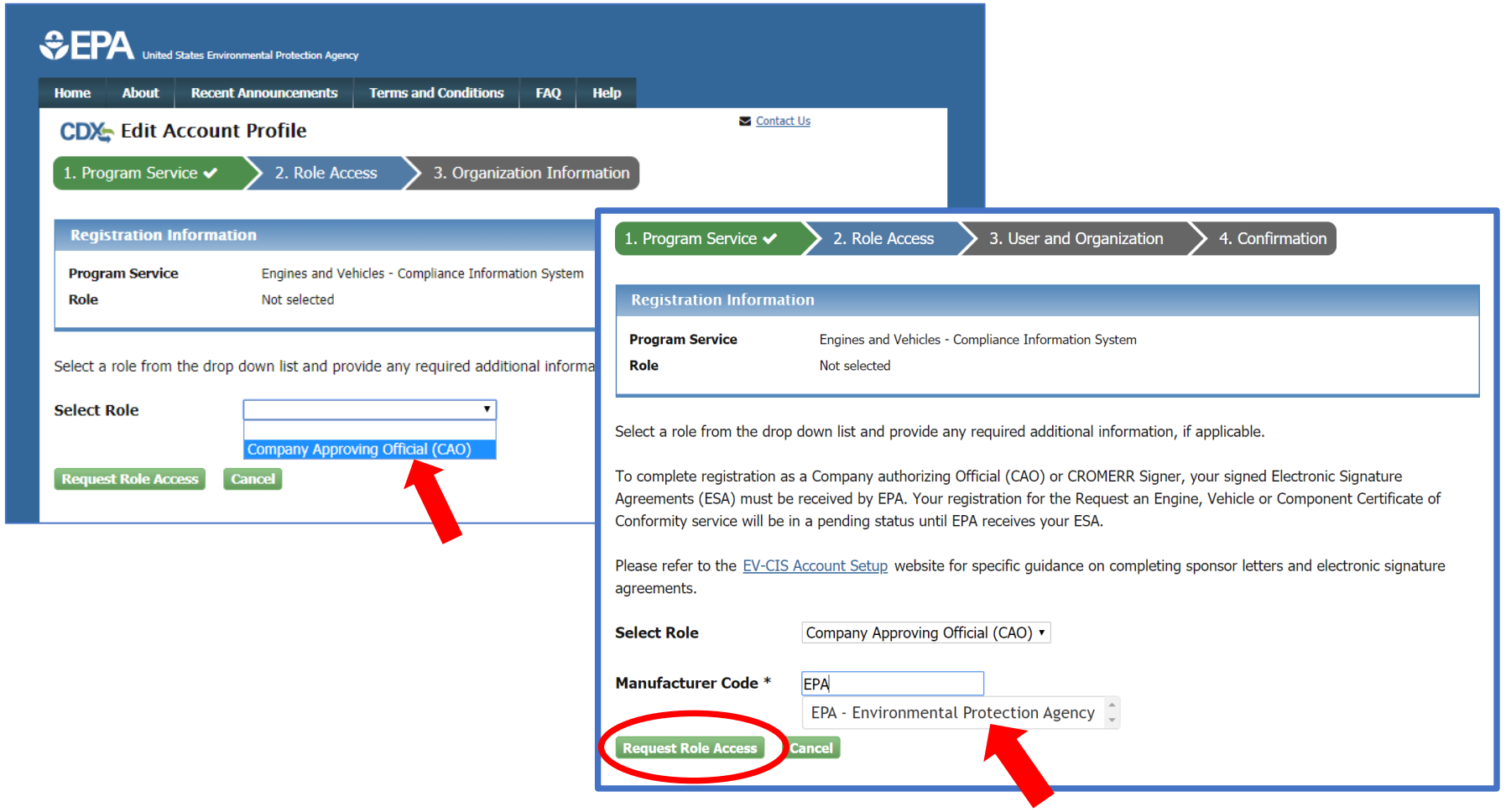
- Type “EV-CIS” to search for the applicable Program Service
- Select “Verify: Vehicles and Engines Compliance Information System – New (1)” for the Program Service Category to display two options
- Then select “EV-CIS: Engines and Vehicles – Compliance Information System” for Program Service



Part 3 Scenario B: Adding CAO Role To Existing CDX Account

Select CAO Role & Manufacturer Code

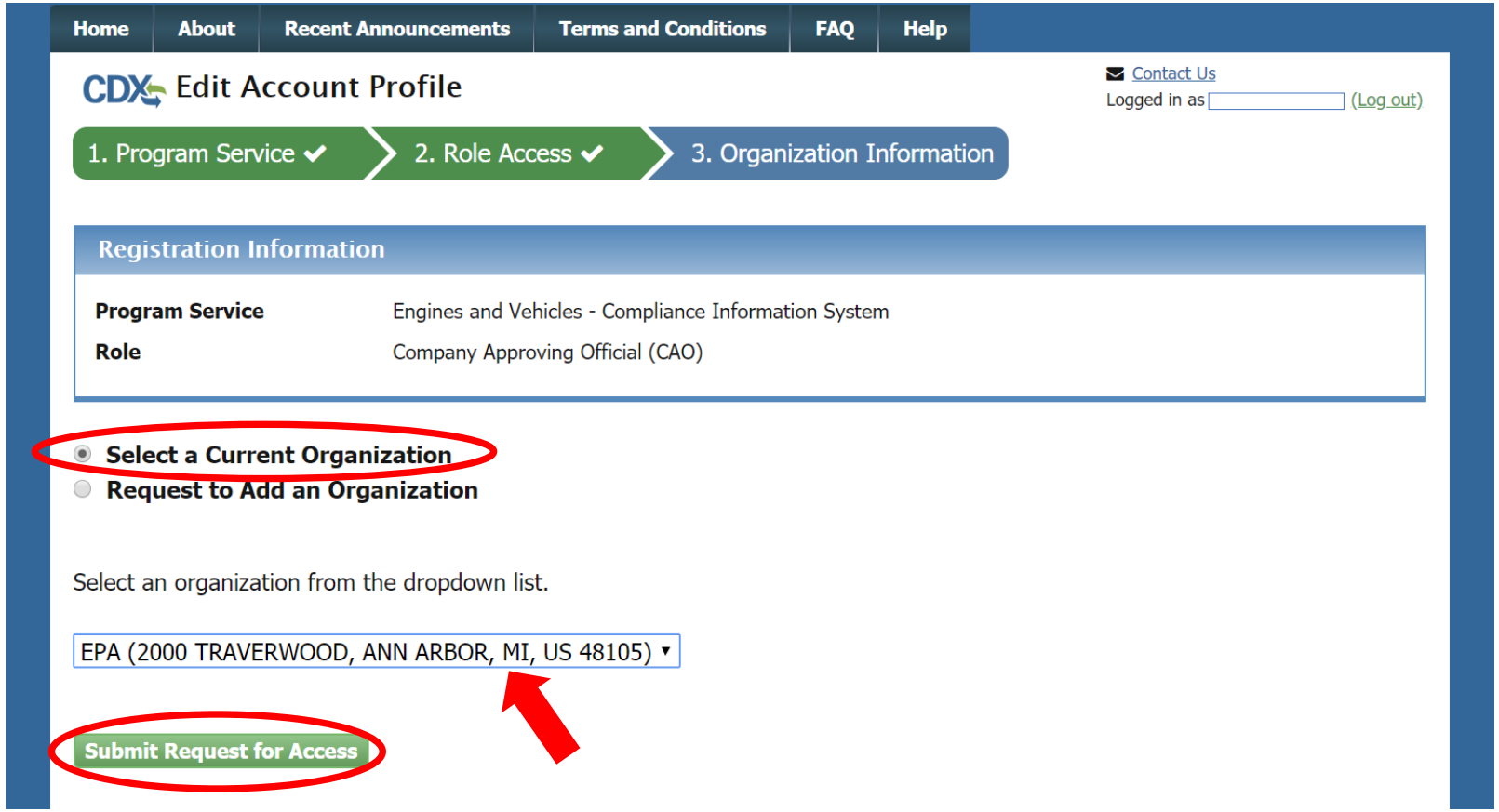
- Select “Company Authorizing Official (CAO)” from the Role dropdown
- Type your Manufacturer Code
- Select the value that is displayed for your Manufacturer Code
- Click the “Request Role Access” button



Part 3 Scenario B: Adding CAO Role To Existing CDX Account

Select Organization

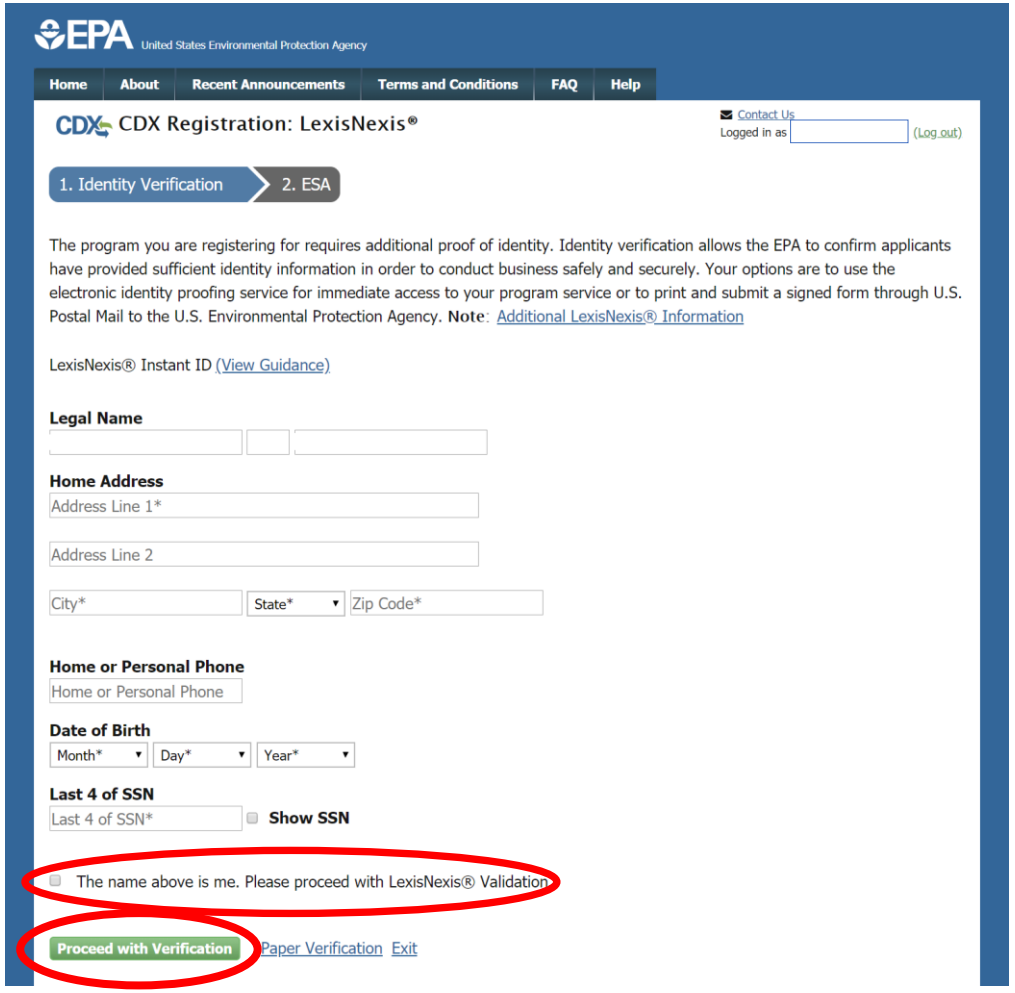
- Select your organization from the dropdown
- Click the “Submit Request for Access” button



Part 3 Scenario B: Adding CAO Role To Existing CDX Account

Provide Information For Identity Verification

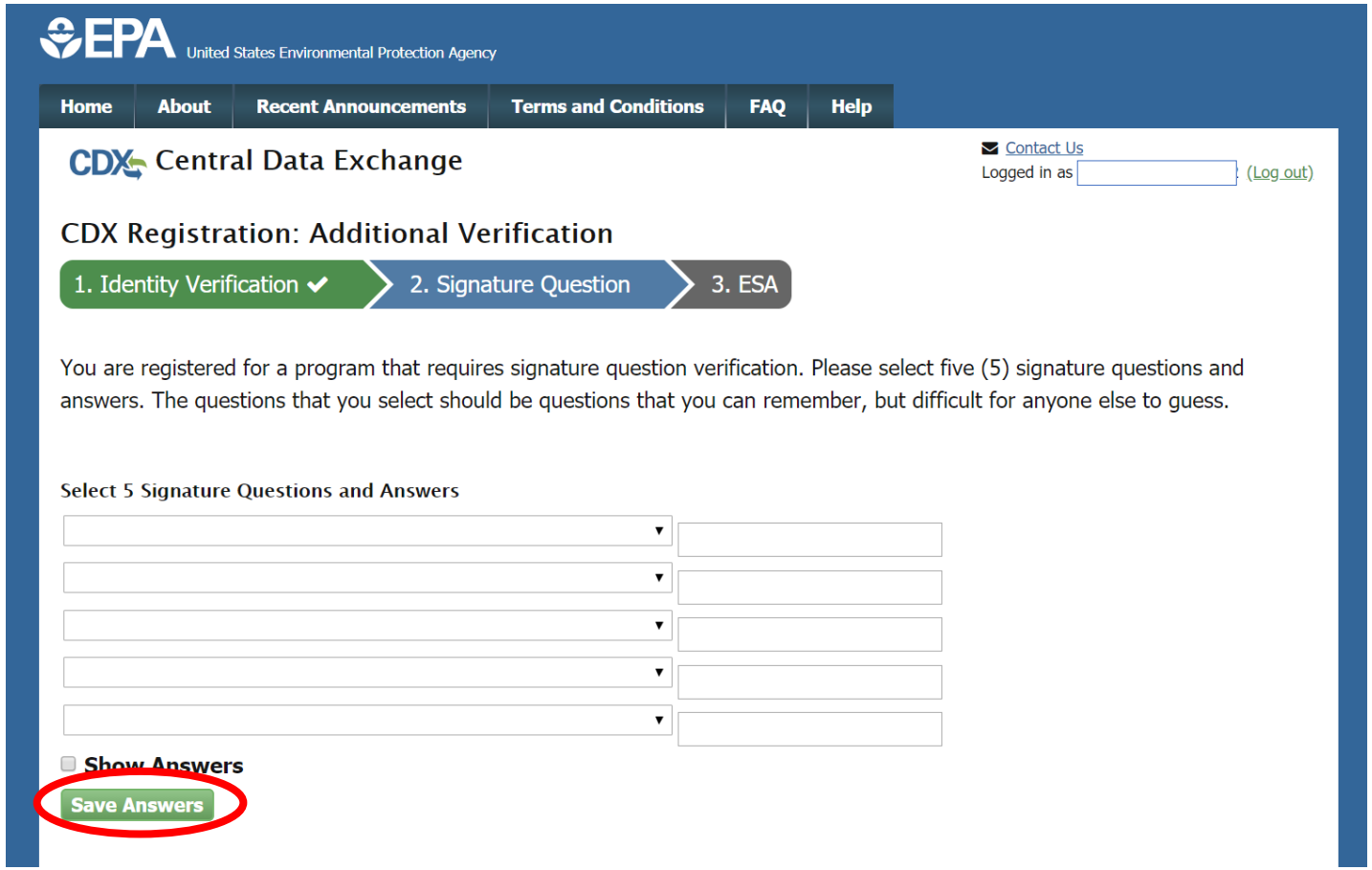
- You will now be prompted to begin the Identity Verification process
- Review/provide your
  - Full Name
  - Home Address
  - Personal Phone Number
  - Birthday
  - Last 4 digits of your Social Security Numbe
- Check the box next to “The name above is me. Please proceed with LexisNexis Validation.”
- Click the “Proceed with Verification” button
  - Or alternatively, click on the “Paper Verification” link



Part 3 Scenario B: Adding CAO Role To Existing CDX Account

Select Signature Questions & Provide Answers

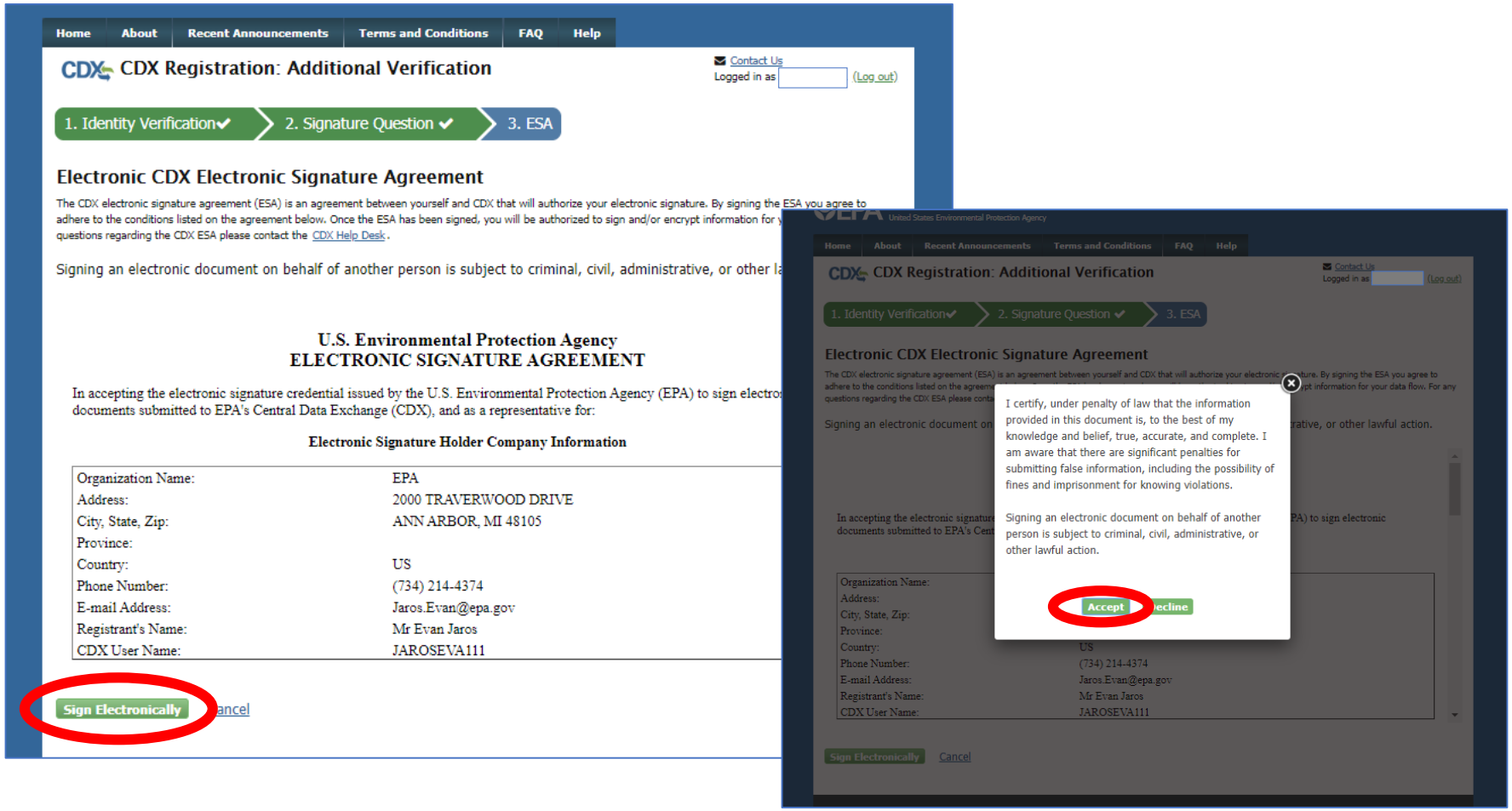
- If your electronic identity verification was completed successfully, you will now be prompted to select 5 signature questions and answers
- Click the “Save Answers” button when complete



Part 3 Scenario B: Adding CAO Role To Existing CDX Account

Review & Sign ESA

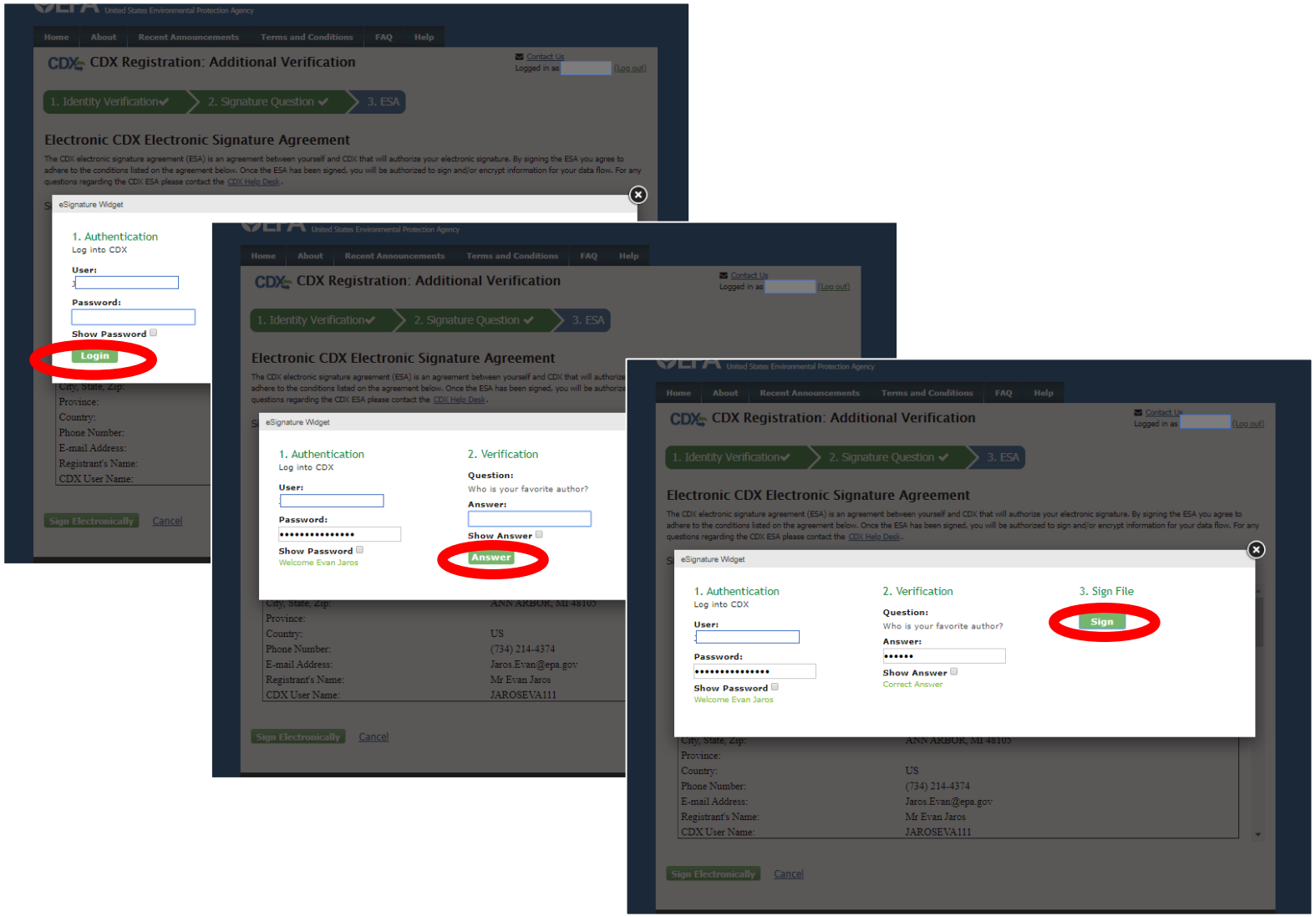
- Review the Electronic Signature Agreement (ESA)
- Click the “Sign Electronically” button
- Review and click the “Accept” button in the pop-up window



Part 3 Scenario B: Adding CAO Role To Existing CDX Account

Electronically Sign ESA

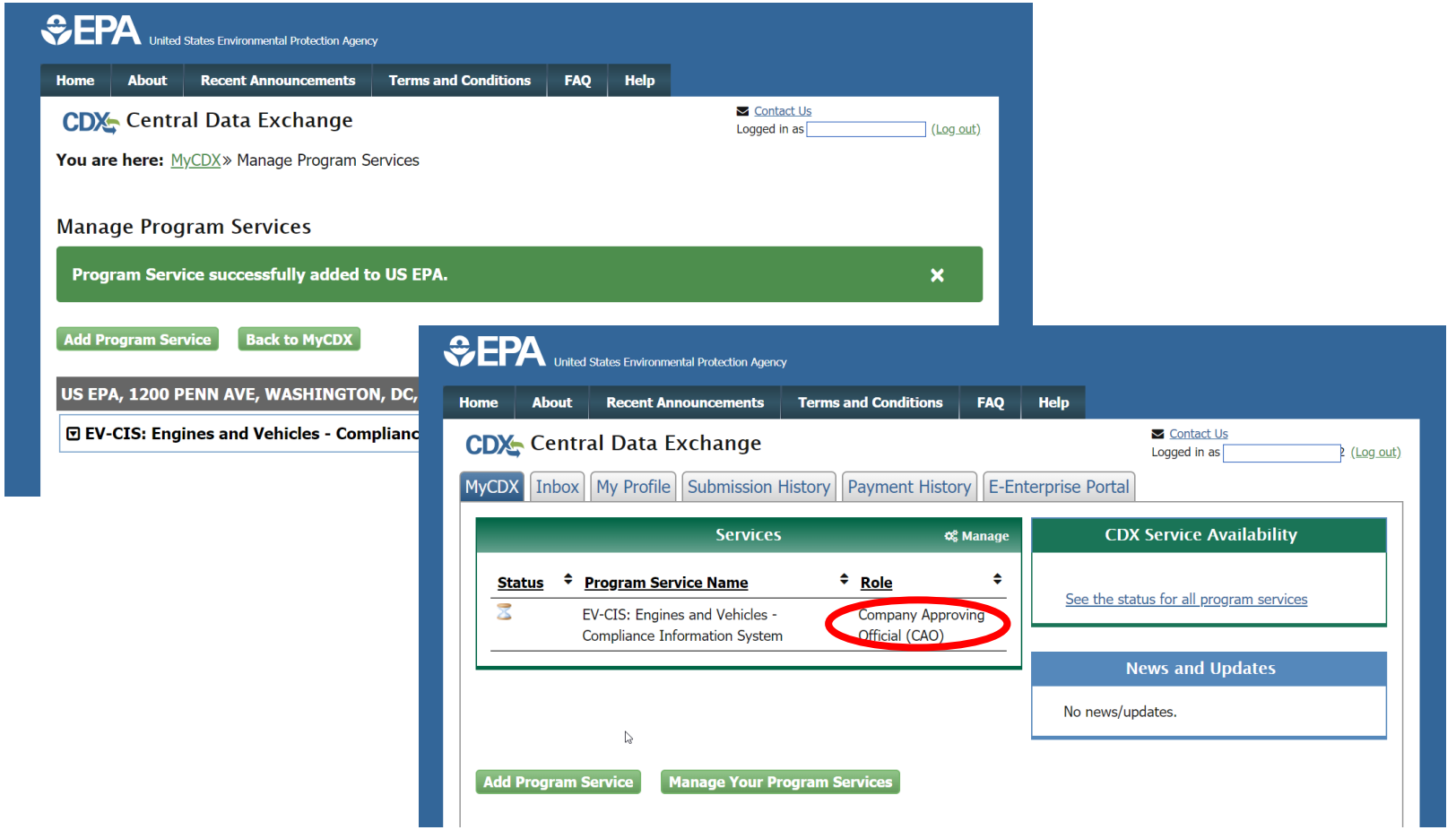
- Complete 3-step electronic signature process in order to Sign ESA
  - Enter Account Password
  - Provide Answer for Signature Question
  - Click the “Sign” button



Part 3 Scenario B: Adding CAO Role To Existing CDX Account

Submit Request For CAO Role For EPA Approval

- After successfully completing the request for CAO process, a confirmation message will display
- Click the “Back to MyCDX” button to return to your MyCDX page that shows the new CAO role which is not active yet
- As soon as EPA approves your new CAO Role, you will receive a confirmation email and the new role will be activated



Part 4:
How To Become A Submitter Or CROMERR Signer

Two Scenarios

- Part 4 Scenario A: CAO sponsors new CDX user who needs Submitter or CROMERR Signer role
- Part 4 Scenario B: CAO sponsors existing CDX user who needs additional role (either Submitter or CROMERR Signer)

Part 4 Scenario A:

CAO Sponsors New CDX User

Part 4 Scenario A:

CAO Sponsors New CDX User

- This scenario has four sections:
  - Section 1- CAO Invites User To Create New CDX Account With Either Submitter or CROMERR Signer Role
  - Section 2- Sponsored User Accepts CAO Invitation
  - Section 3- CAO Signs ESA Authorizing Sponsored User For The Requested Role
  - Section 4- (Only for CROMERR Signer Role) Sponsored User Completes CROMERR Signer Role Activation By Completing Electronic Identity Verification and Signing ESA

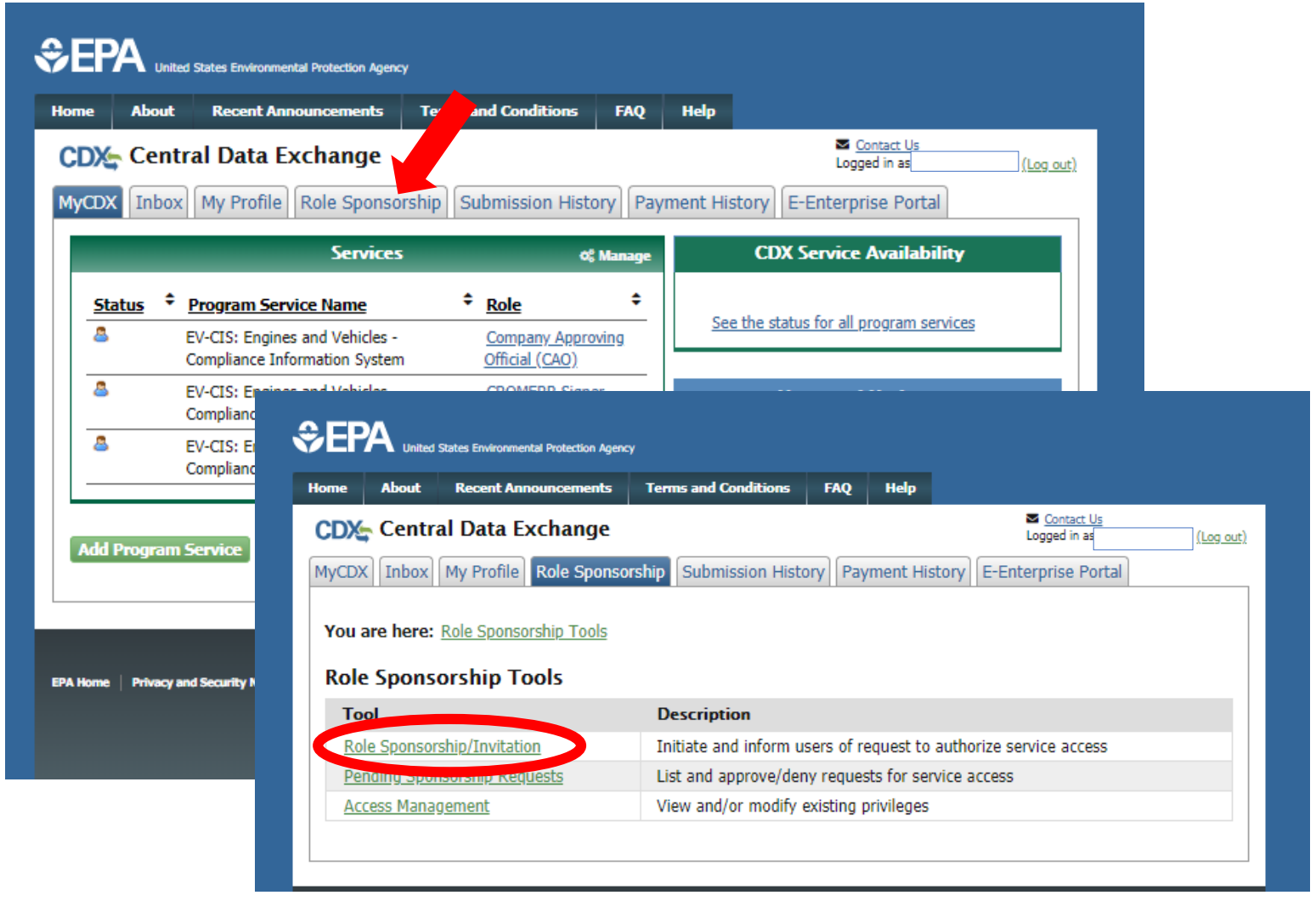
Part 4 Scenario A: CAO Sponsors New CDX User

Section 1 of 4: CAO Invites User To Create New CDX Account With Either CROMERR Signer or Submitter Role

Part 4 Scenario A: CAO Sponsors New CDX User

CAO Begins New "Role Sponsorship" Invitation

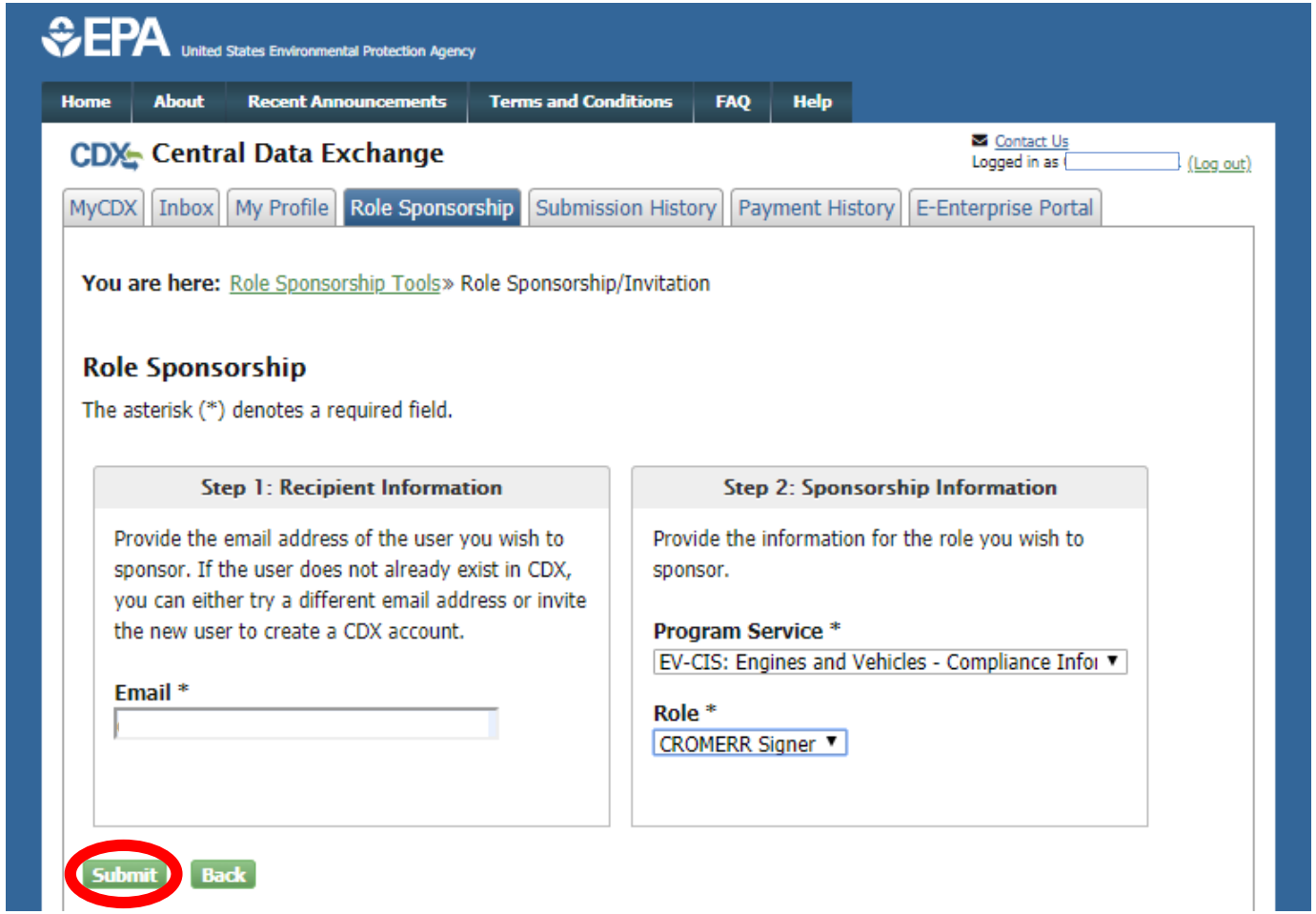
- CAO logs in to CDX
- Click on "Role Sponsorship" tab
  - This tab is only visible for users with CAO role
- Click on "Role Sponsorship/Invitation" link



Part 4 Scenario A: CAO Sponsors New CDX User

CAO Provides Role Sponsorship Information

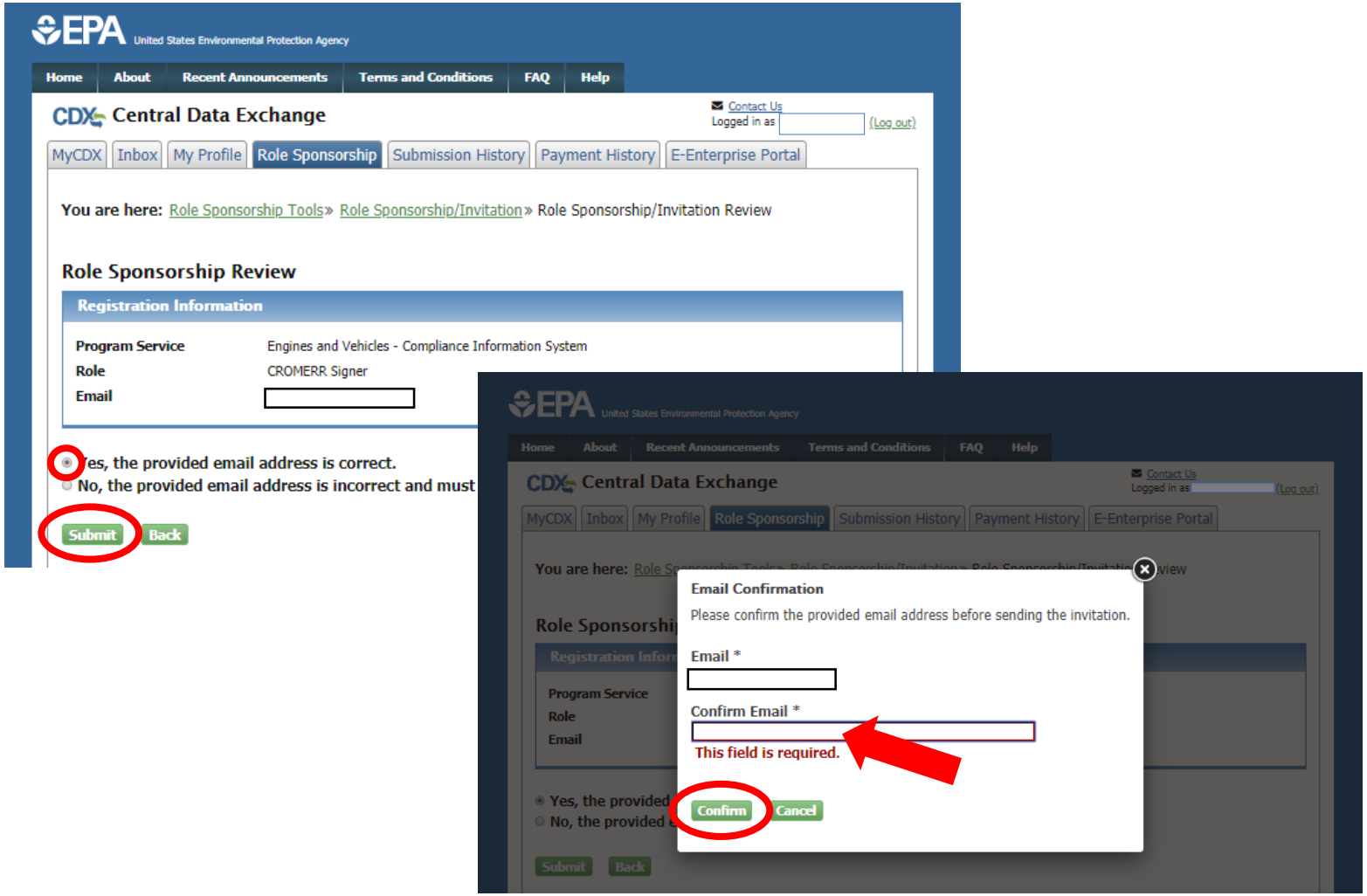
- Type sponsored user's email address
- Select "EV-CIS" for Program Service
- Select the desired Role (either Submitter or CROMERR Signer)
- Click the "Submit" button



Part 4 Scenario A: CAO Sponsors New CDX User

CAO Confirms Role Sponsorship Information

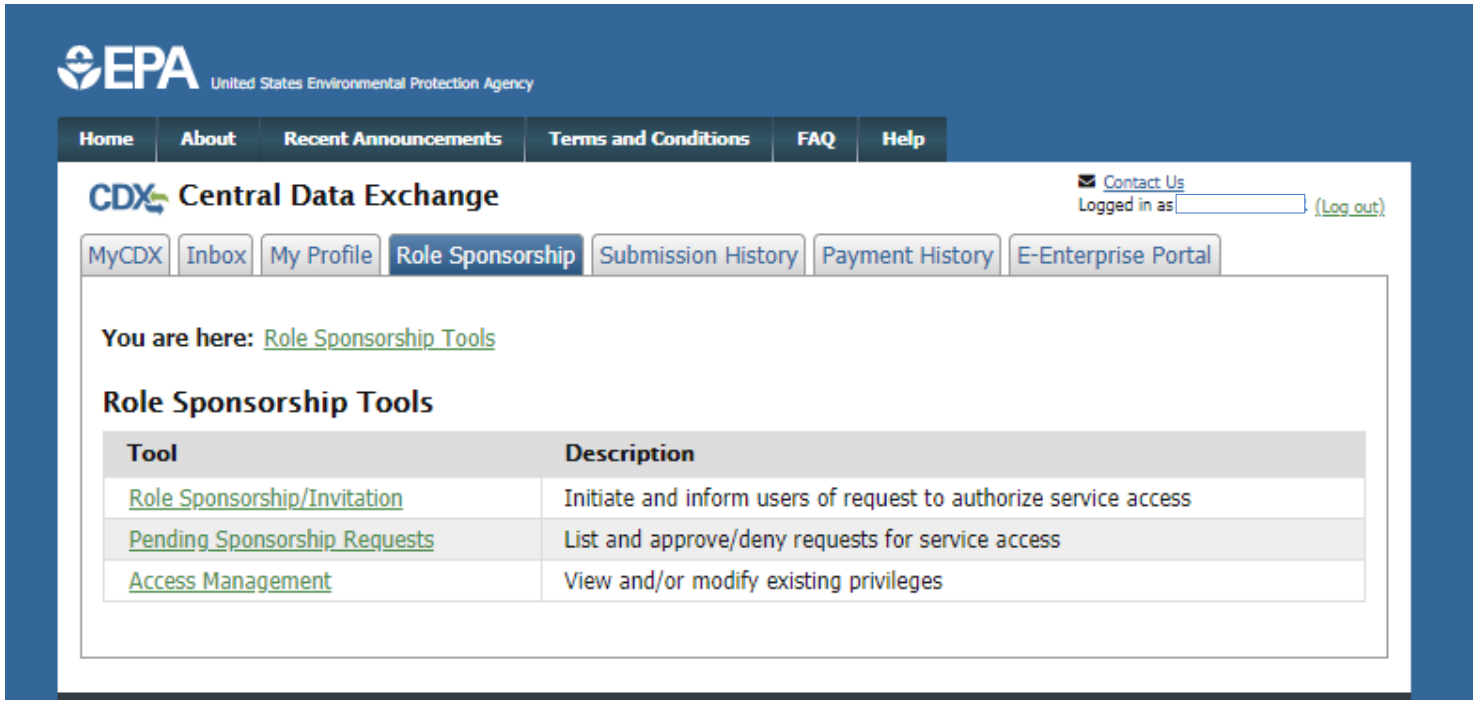
- Review the provided role sponsorship information
- Select “Yes, the provided email address is correct.”
- Click the “Submit” button
- Review the email of the sponsored user previously entered displayed in the pop-up window
- Re-type the email of the sponsored user
- Click the “Confirm” button



Part 4 Scenario A: CAO Sponsors New CDX User

CAO Completes Role Sponsorship Invitation

- After completing sponsorship request, you will be returned to the “Role Sponsorship” tab
- Sponsored User must now act on email they receive before CAO is prompted to complete their next step in the process
- The new sponsorship request will not show up in the “Pending Sponsorship Requests” search results until after the sponsored user acts on the email they receive



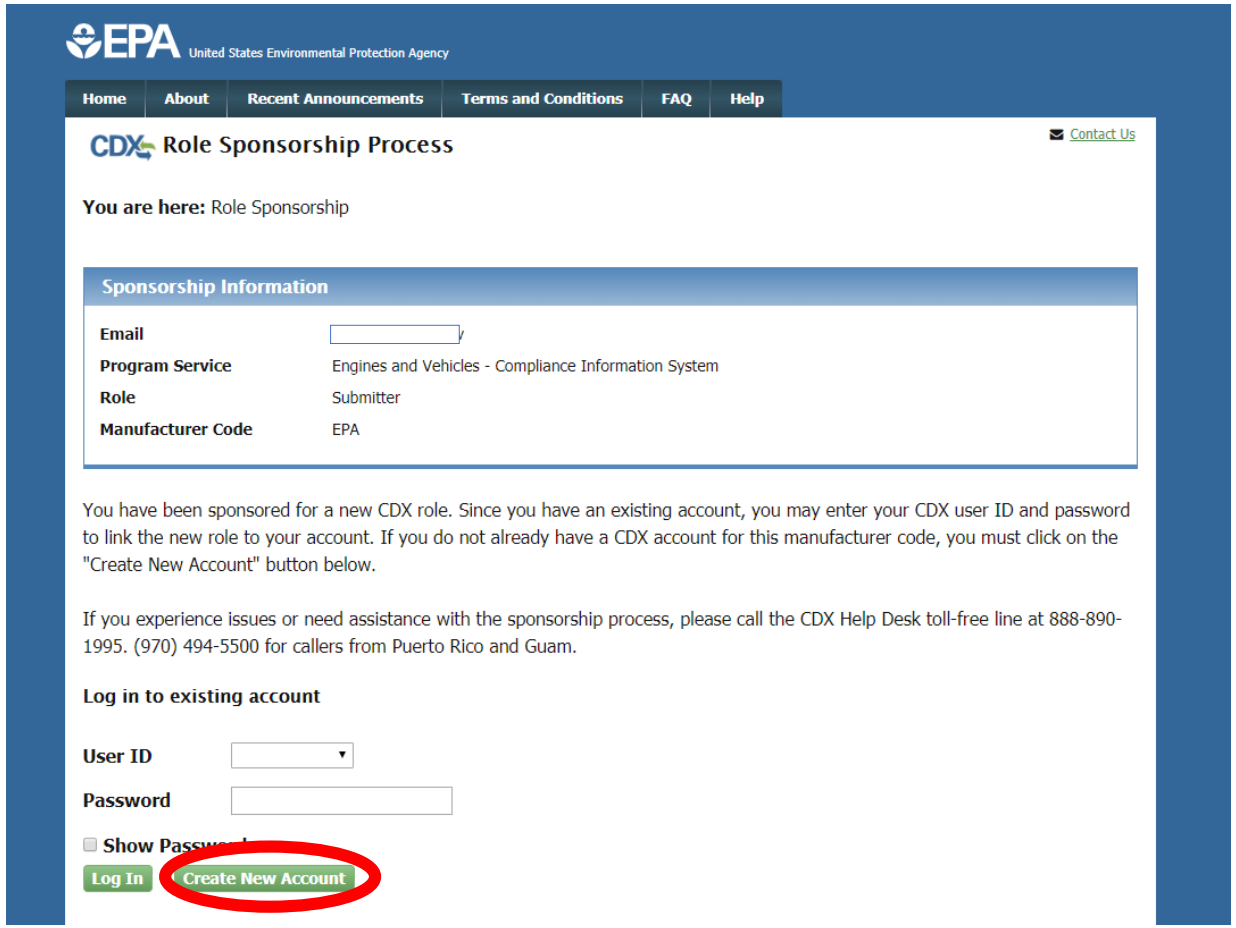
Part 4 Scenario A: CAO Sponsors New CDX User

Section 2 of 4: Sponsored User Accepts CAO Invitation

Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Creates New CDX Account

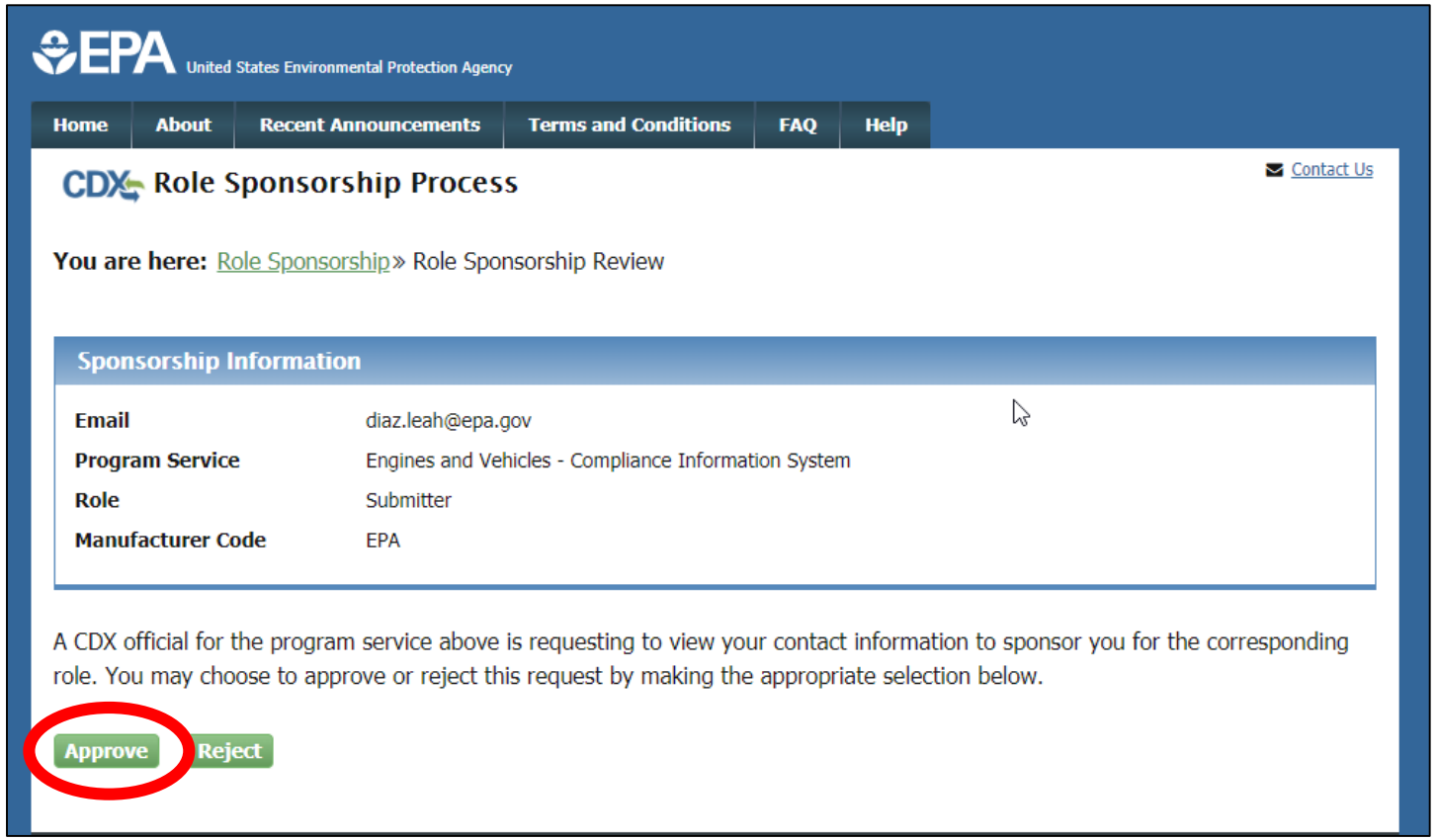
- Click the link in the CDX email
- Click the “Create New Account” button



Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Approves Role Invitation

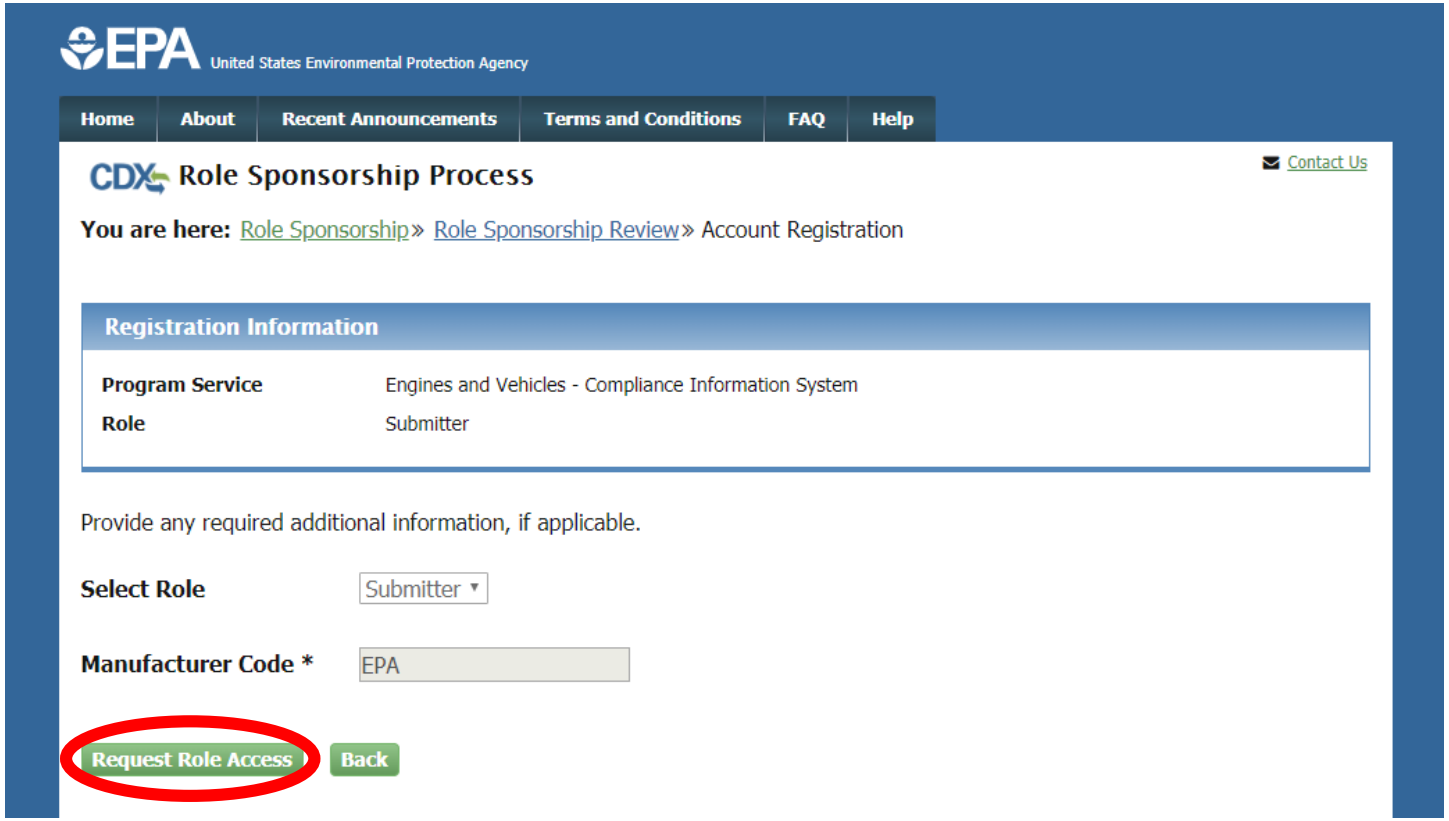
- Review the Sponsorship Information
- Click the “Approve” button



Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Requests Role Access

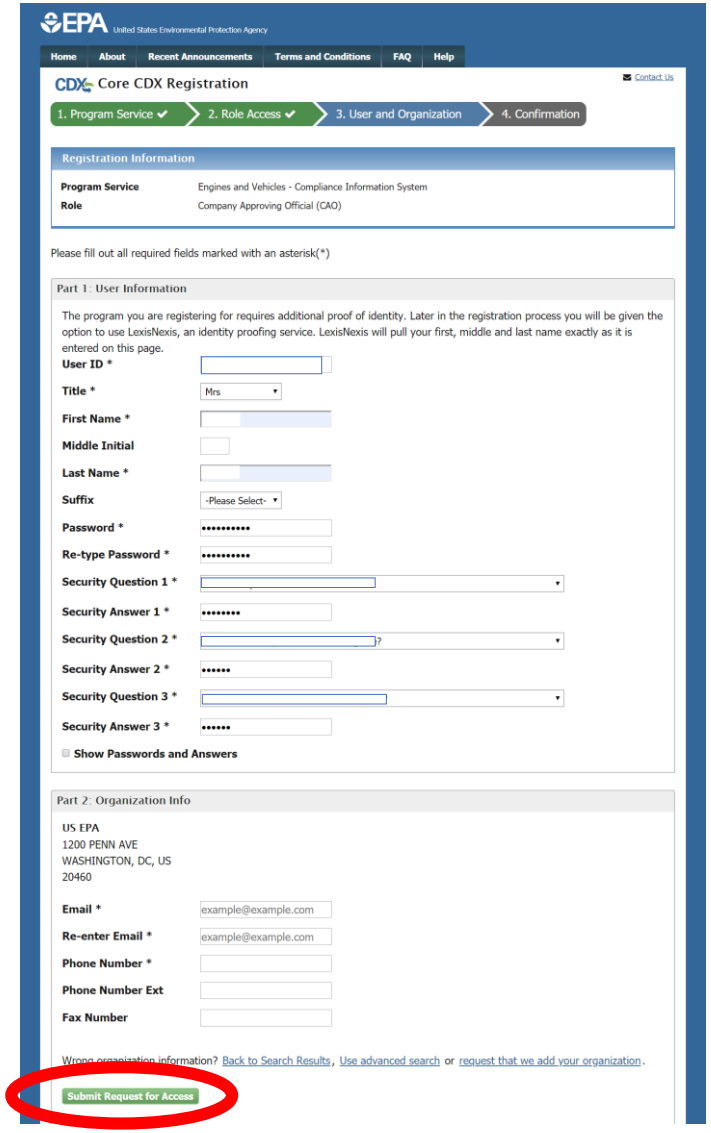
- Review the sponsored Role and Manufacturer Code
- Click “Request Role Access” button



Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Provides Account Information

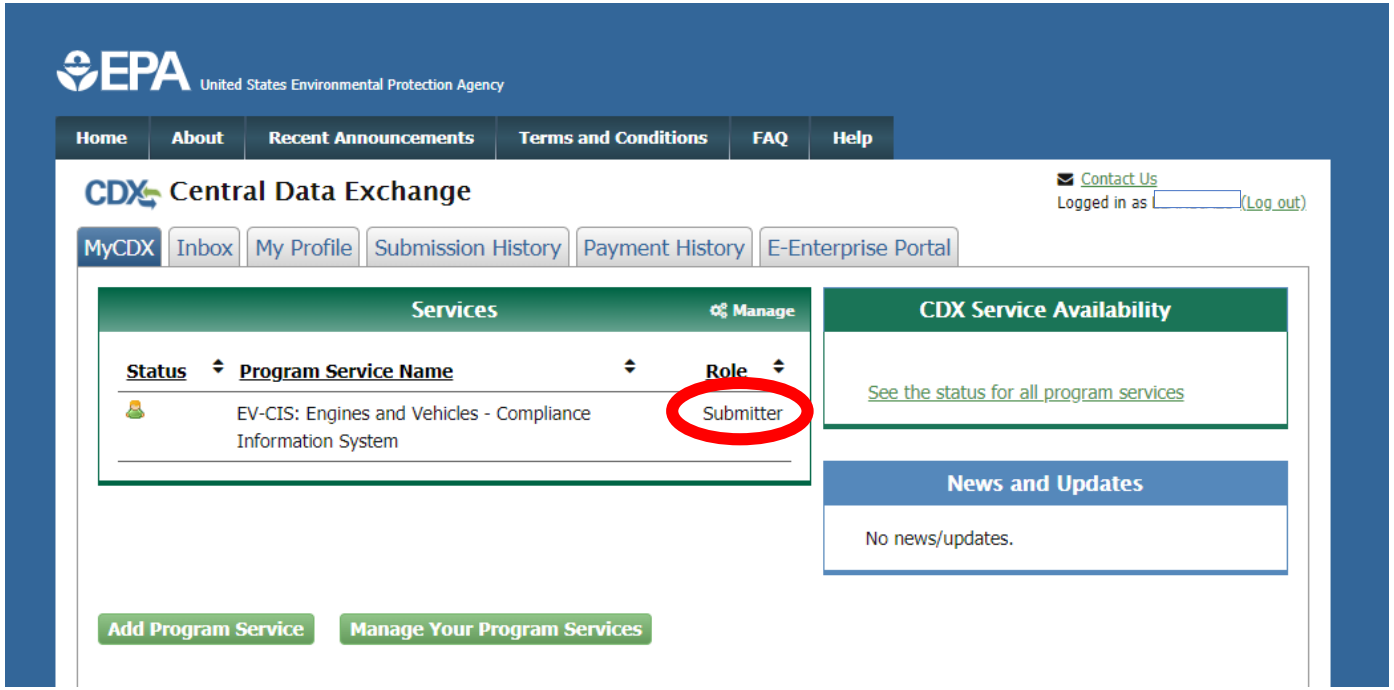
- Provide User Information
- Create a password
- Provide security questions & answers
- Type your company name and click “Search” button
- Select the correct Organization ID from the list
- Provide your business email address & phone number
- Click on the “Submit Request for Access” button
- Wait for email from CDX to complete account registration



Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Waits For Required CAO Action

- After submitting your request for new account, you will be returned to your MyCDX page where your new role will be visible but not active
- Your CAO must now act on the email they receive before you can complete the process



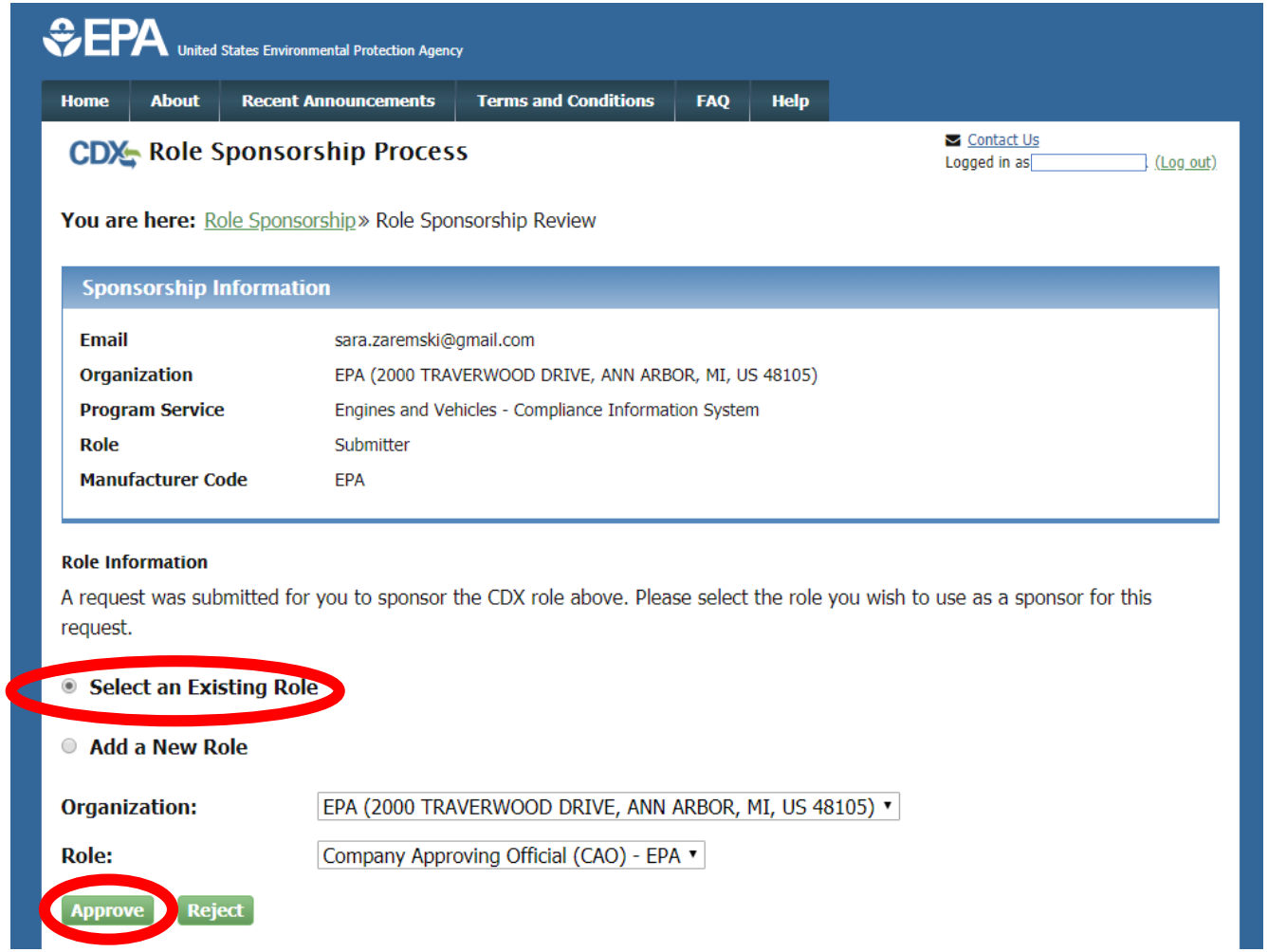
Part 4 Scenario A: CAO Sponsors New CDX User

Section 3 of 4:
CAO Signs ESA Authorizing Sponsored User For The Requested Role

Part 4 Scenario A: CAO Sponsors New CDX User

CAO Approves Role Sponsorship Request From Email

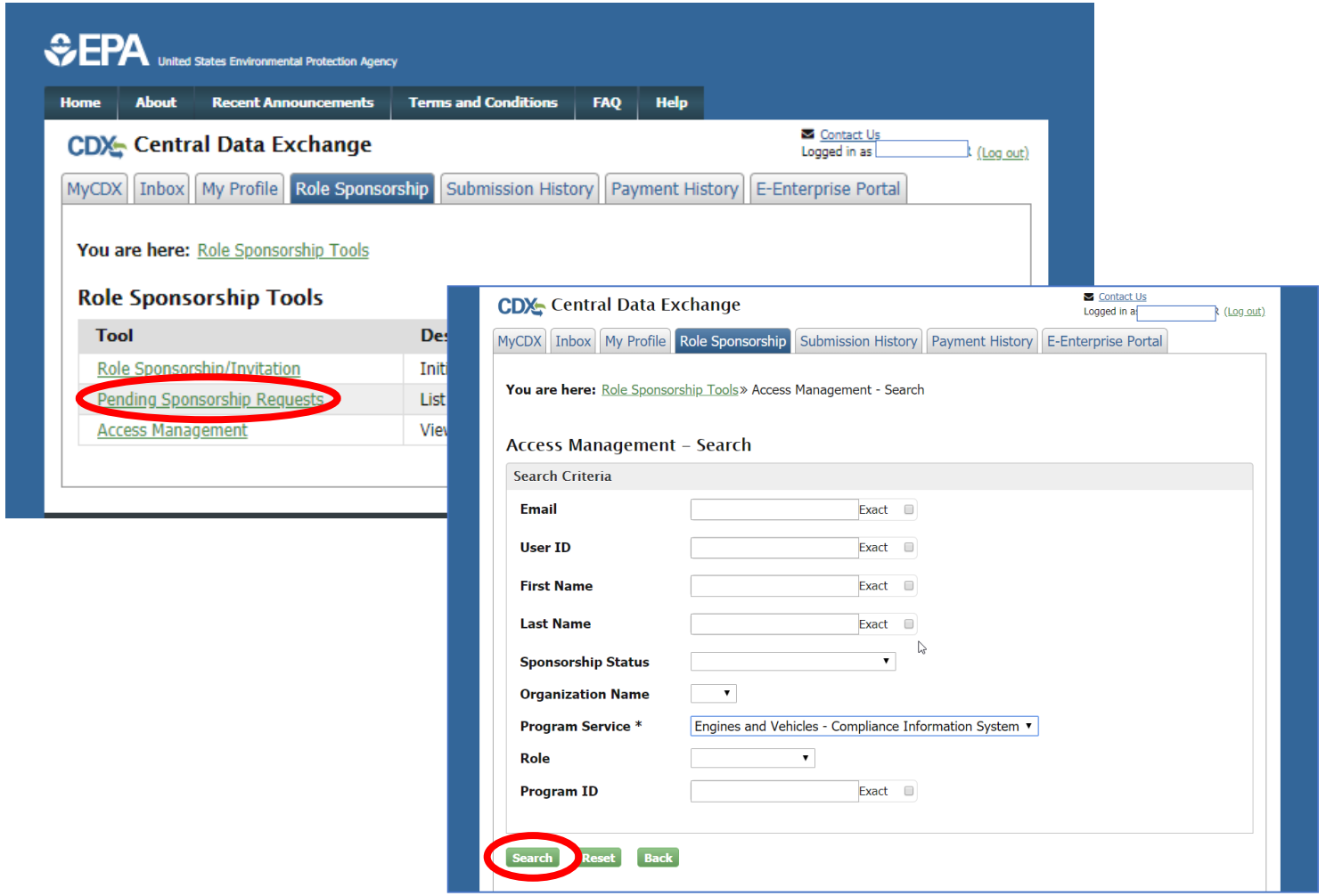
- Click the “Review…” link from CDX email
  - Or click the “Pending Sponsorship Requests” link on Role Sponsorship tab (see next slide)
- Click “Select an Existing Role
- Select your Organization
- Select “CAO” for the Role that will be used to approve this request
- Click the “Approve” button



Part 4 Scenario A: CAO Sponsors New CDX User

CAO Searches For Pending Role Sponsorship Request

- Click on Role Sponsorship tab
  - This is an alternative process to clicking on the link in the CDX email
- Click on “Pending Sponsorship Requests” link
- Select “Engines and Vehicles – Compliance Information System” for Program Service
- Enter any other desired search criteria
- Click on “Search” button



Part 4 Scenario A: CAO Sponsors New CDX User

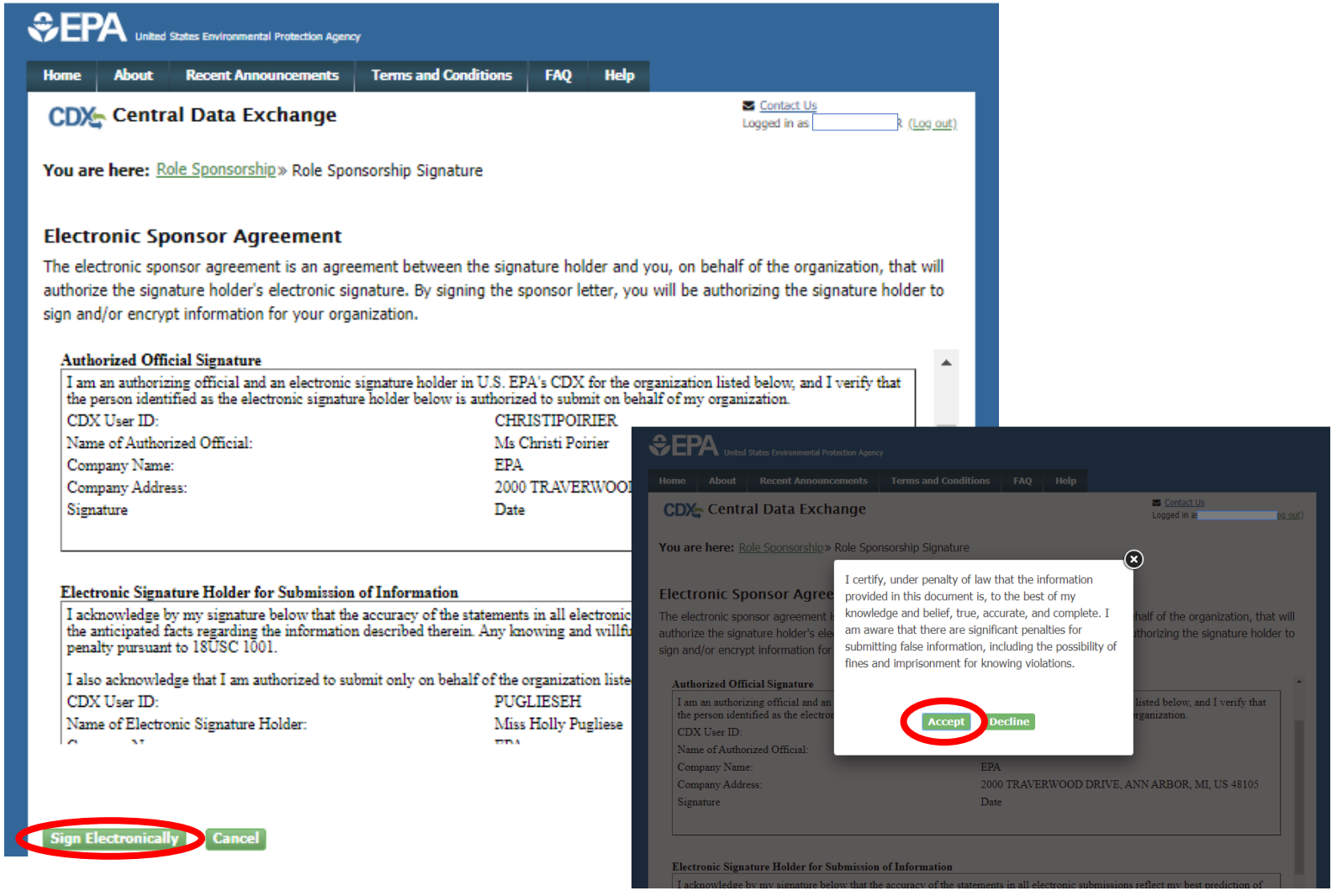
CAO Approves Pending Role Sponsorship Request

- Click “Approve” in the Actions column for the desired pending request

Part 4 Scenario A: CAO Sponsors New CDX User

CAO Signs ESA For This Sponsorship Request

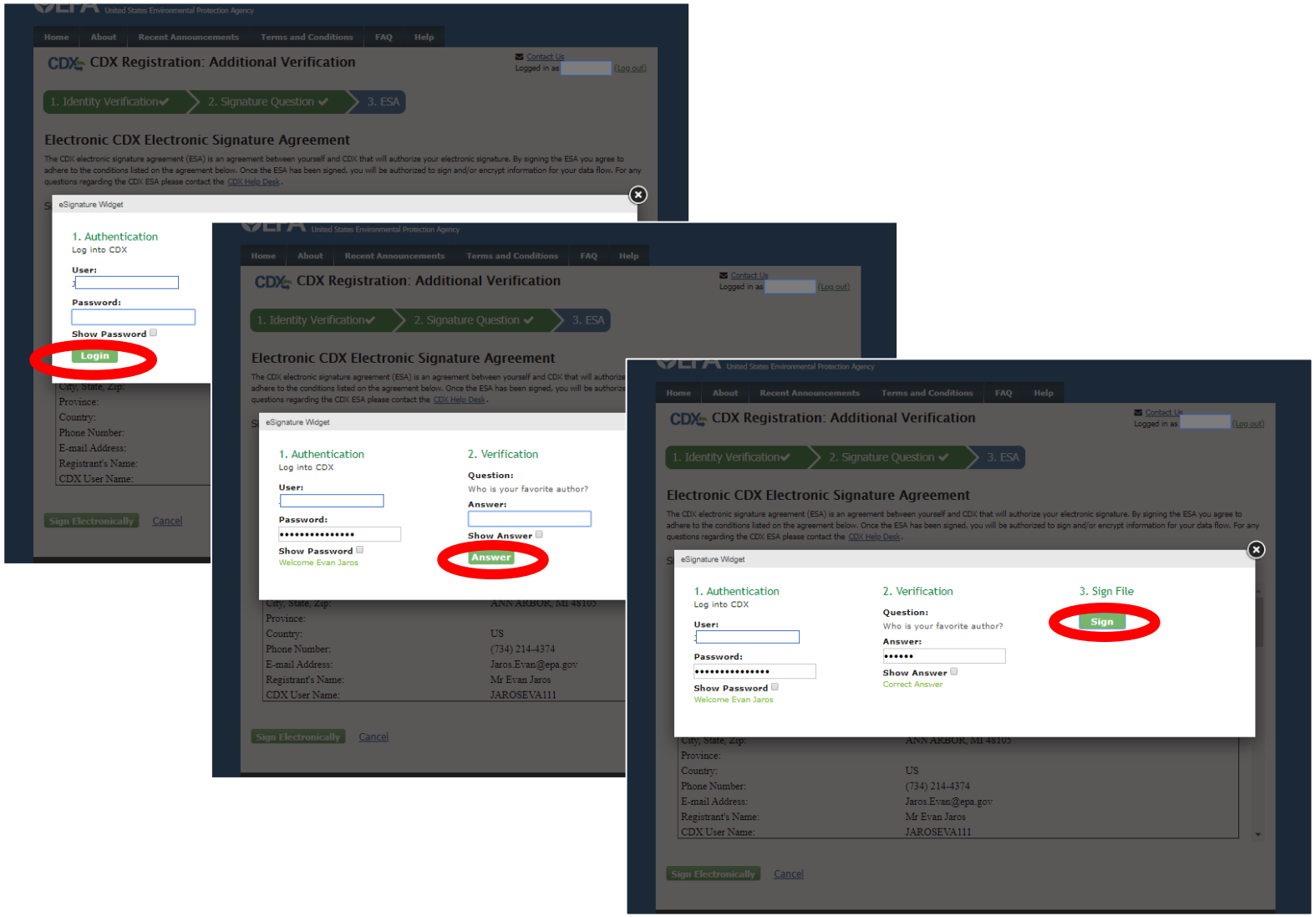
- Review ESA
- Click “Sign Electronically” button
- Review attestation statement
- Click the “Accept” button in the pop-up window



Part 4 Scenario A: CAO Sponsors New CDX User

CAO Signs ESA For This Sponsorship Request

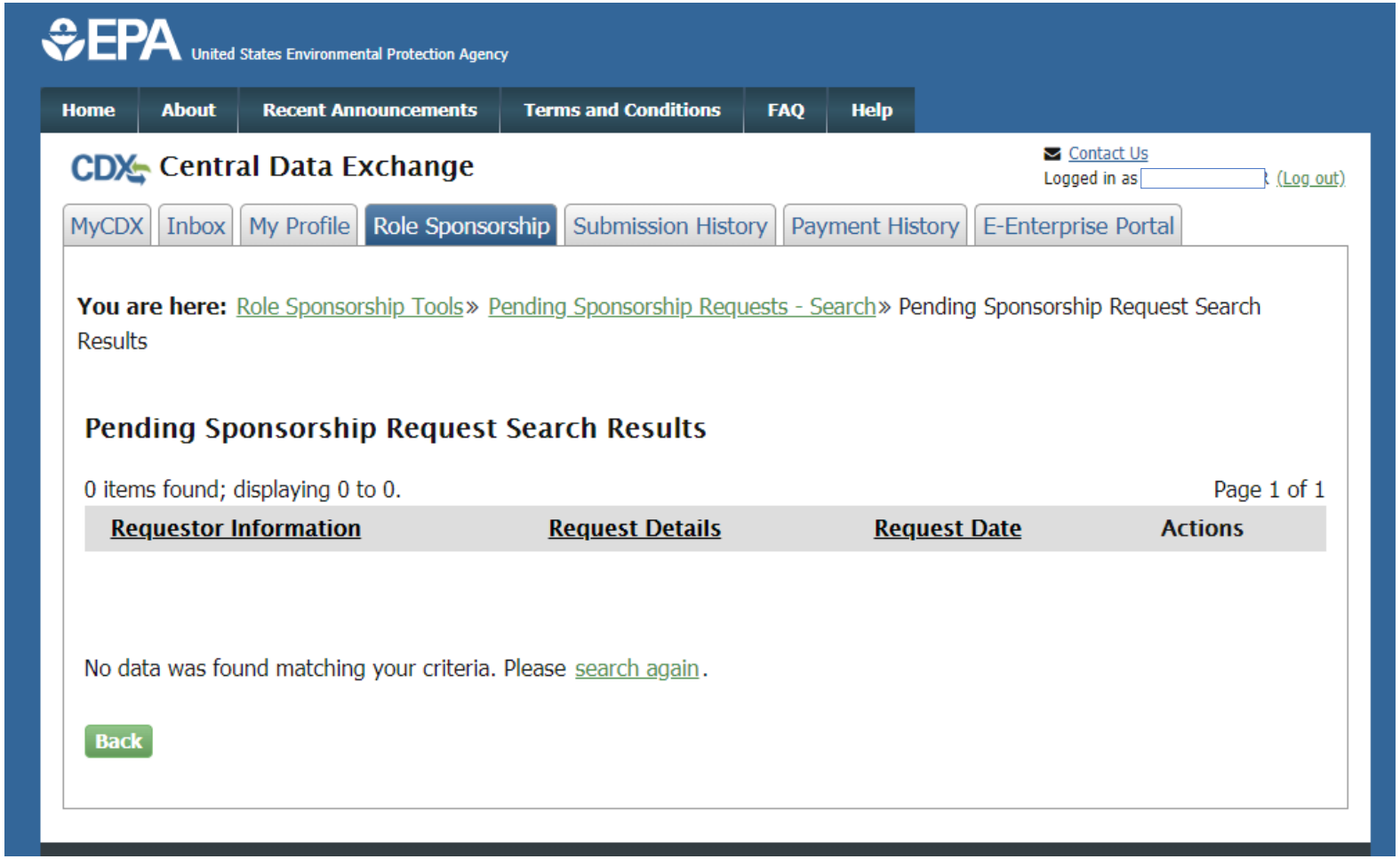
- This is a 3-step window.
  1. Type Password and click “Login”
  2. Answer security question and click “Answer” button
  3. Click “Sign” button



Part 4 Scenario A: CAO Sponsors New CDX User

CAO Approves Sponsorship Request

- After signing ESA, you will be returned to the "Role Sponsorship" tab and no further action is necessary by CAO for this sponsorship
- The Sponsored User will receive an email that contains instructions and a link to complete their next step in the process
- If the Submitter Role was being added, this was the last step and the new role should now be active. If the CROMERR Signer Role was being added, the next section outlines the final Identity Verification and ESA steps to be taken by the Sponsored User.



Part 4 Scenario A: CAO Sponsors New CDX User

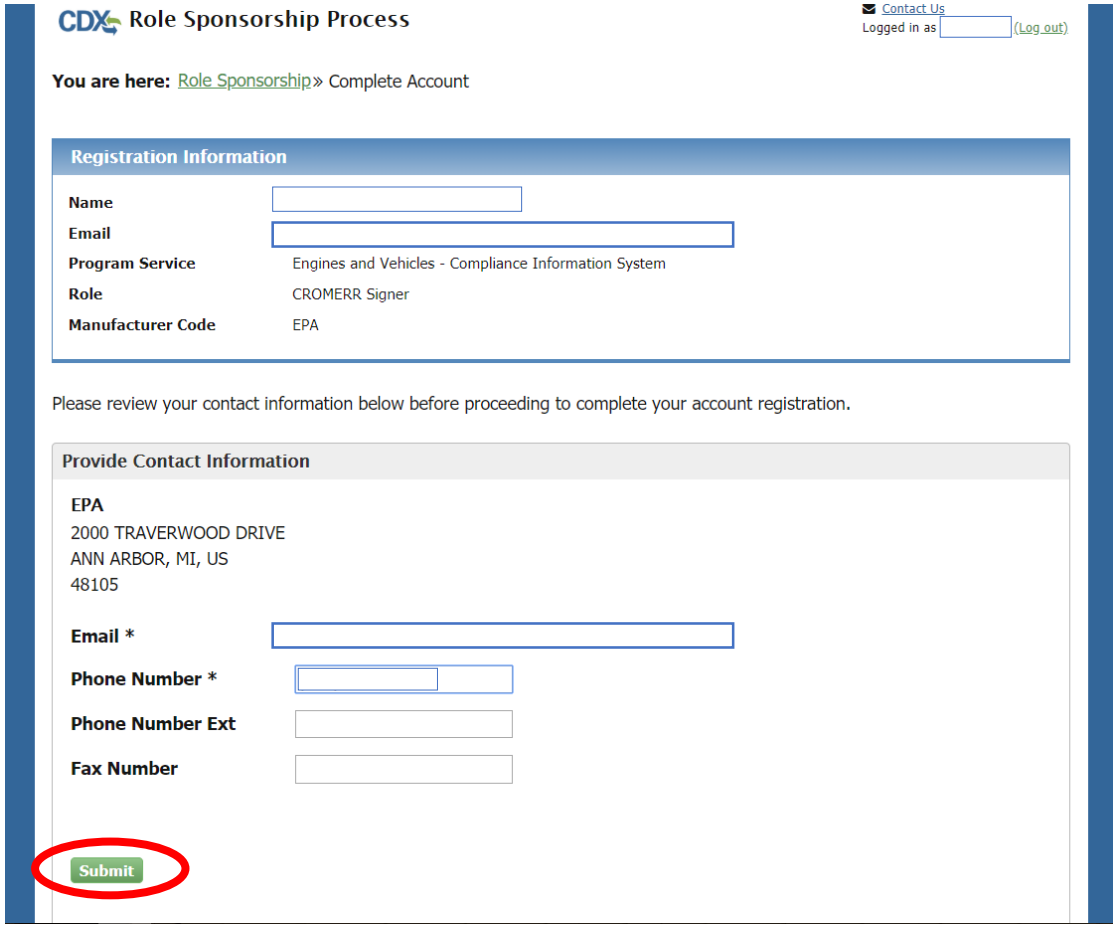
Section 4 of 4:
Sponsored User Completes CROMERR Signer Role Activation By Completing Electronic Identity Verification and Signing ESA

Note- This section is not required for Submitter Role or if Identity Verification was already completed as part of CAO Role approval.

Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Reviews Account Information

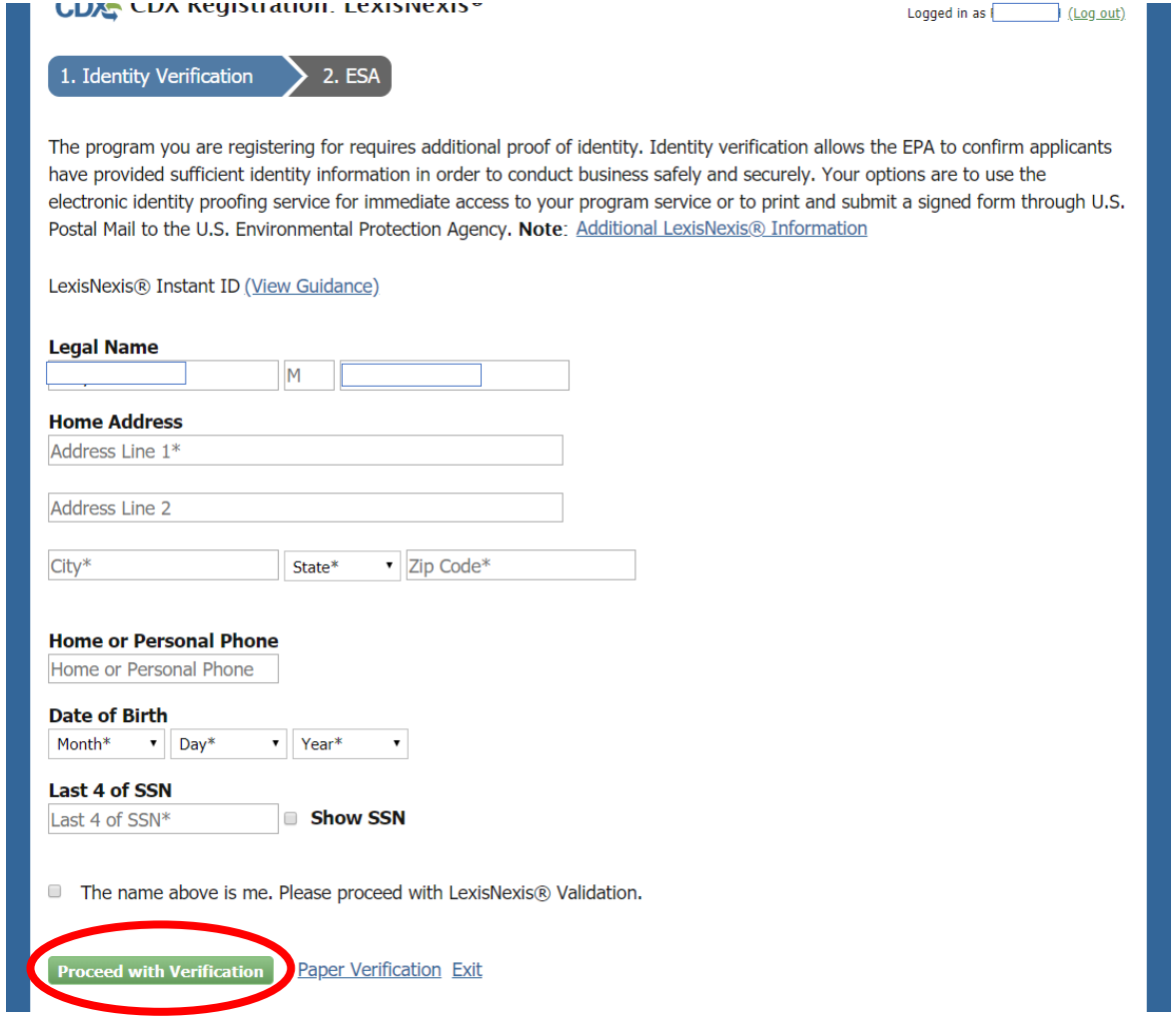
- Click “Log in…” link from CDX email
- Log in to CDX
- Review pending role sponsorship and contact information
- Click “Submit” button



Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Provides Identity Verification Information

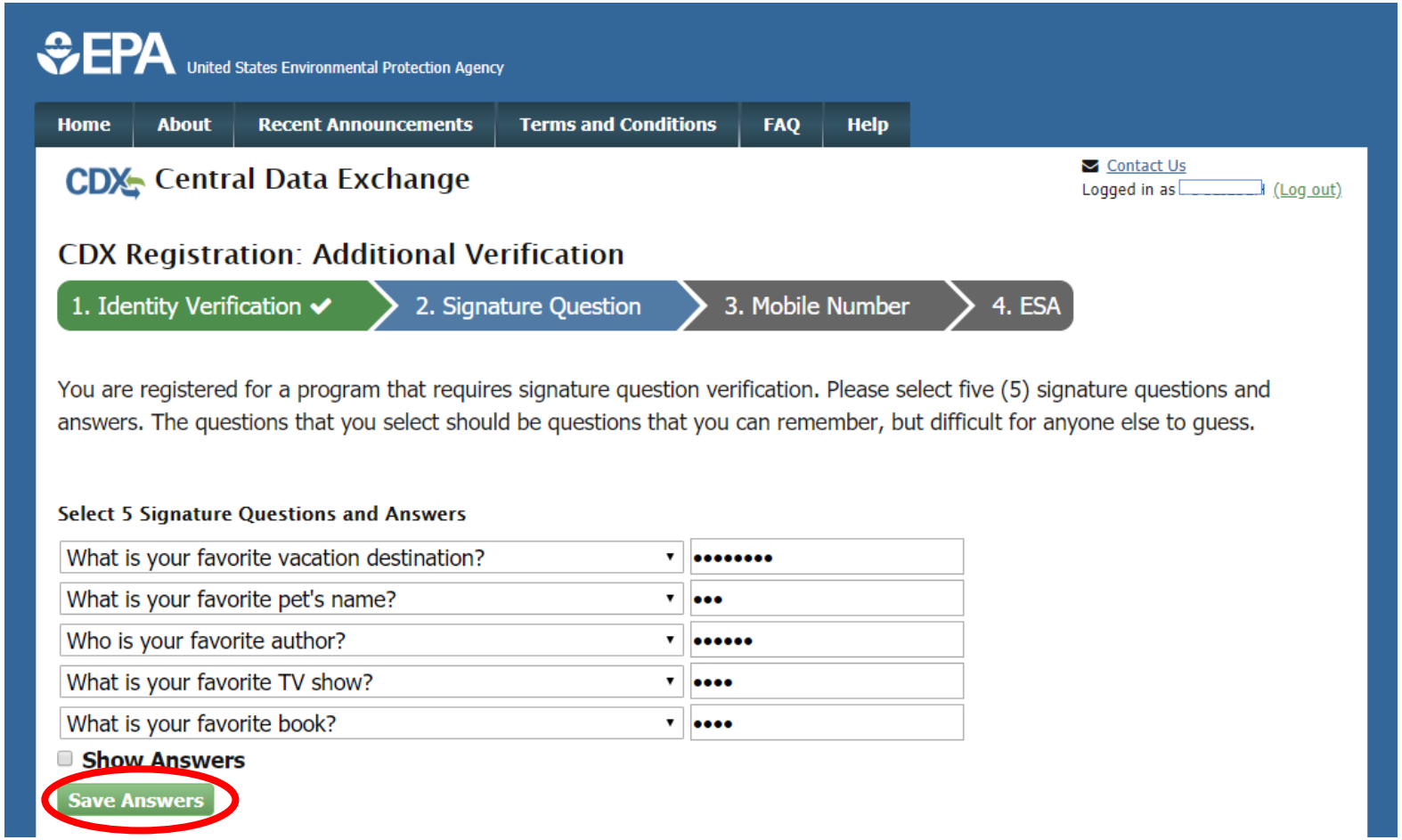
- Review/Provide required personal information for electronic identity verification
- Check the box next to "The name above is me. Please proceed with LexisNexis Validation."
- Click "Proceed with Verification"



Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Selects Signature Questions

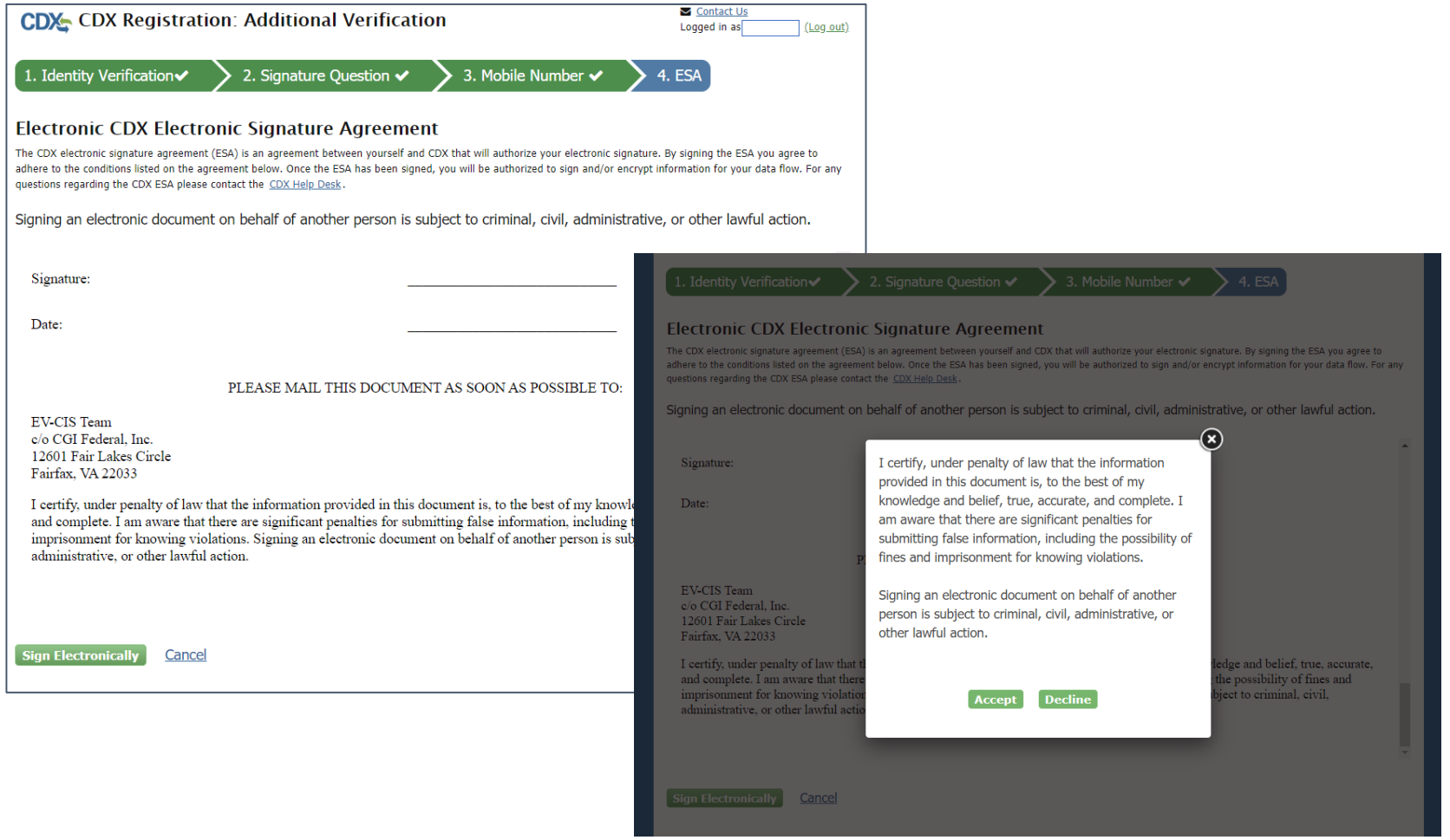
- Select 5 security questions from the dropdowns
- Provide the answer for each selected question
- Click “Save Answers” button



Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Reviews ESA

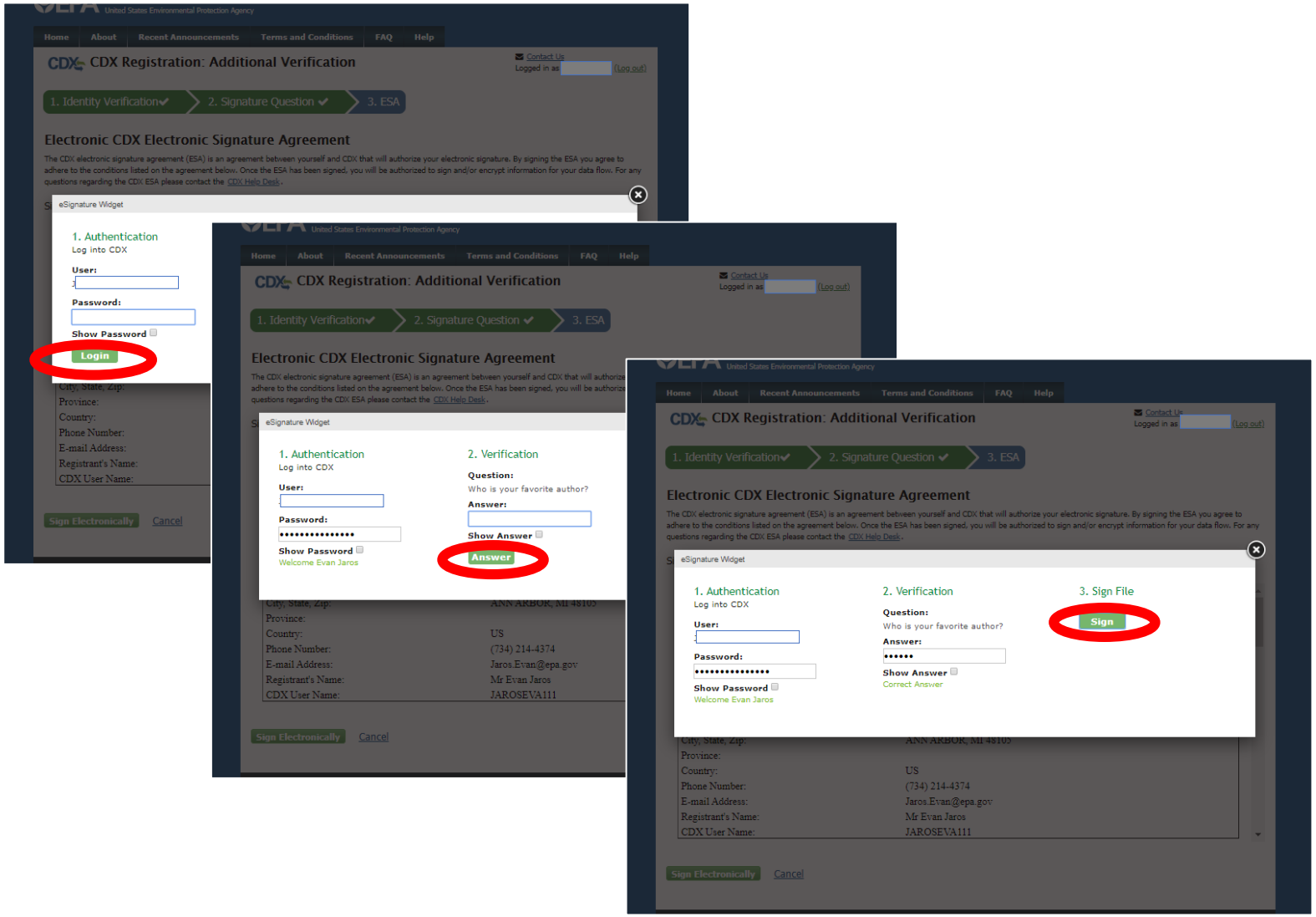
- Review Electronic Signature Agreement (ESA)
- Click “Sign Electronically”
- Review Attestation statement
- Click “Accept”



Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Signs ESA

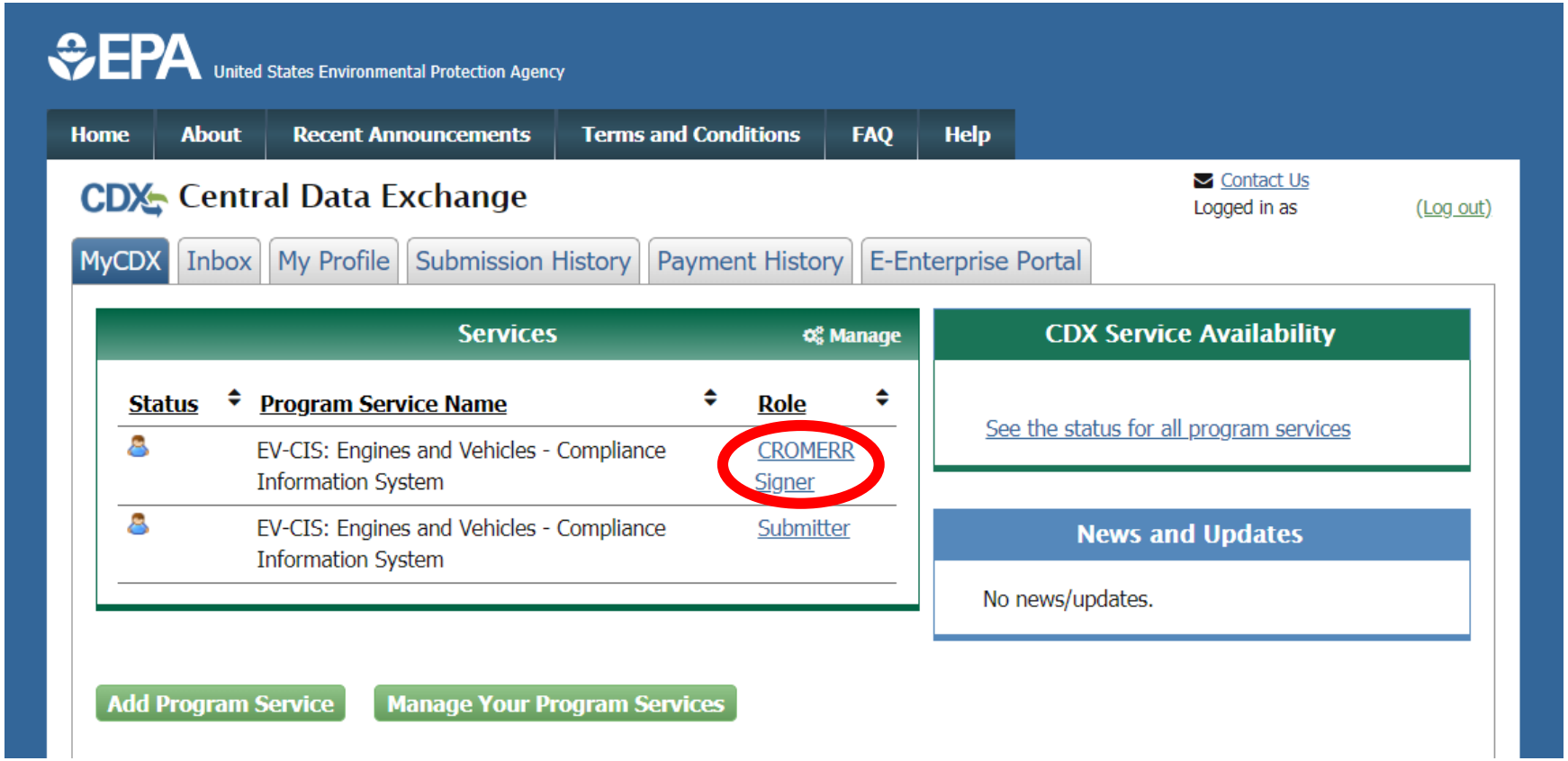
- This is a 3-step window.
  1. Type Password and click “Login”
  2. Answer security question and click “Answer” button
  3. Click “Sign” button



Part 4 Scenario A: CAO Sponsors New CDX User

Sponsored User Completes Role Sponsorship Process

- After completing electronic identity verification and ESA process, you will be returned to the “MyCDX” page
- Your new CROMERR Signer role will now be active



Part 4 Scenario B:

CAO Sponsors New Role For Existing CDX User

Part 4 Scenario B:

CAO Sponsors New Role For Existing CDX User

- This scenario has four sections:
  - Section 1- CAO Invites User To Create New CDX Account With Either Submitter or CROMERR Signer Role
  - Section 2- Sponsored User Accepts CAO Invitation
  - Section 3- CAO Signs ESA Authorizing Sponsored User For The Requested Role
  - Section 4- (Only for CROMERR Signer Role) Sponsored User Completes CROMERR Signer Role Activation By Completing Electronic Identity Verification and Signing ESA

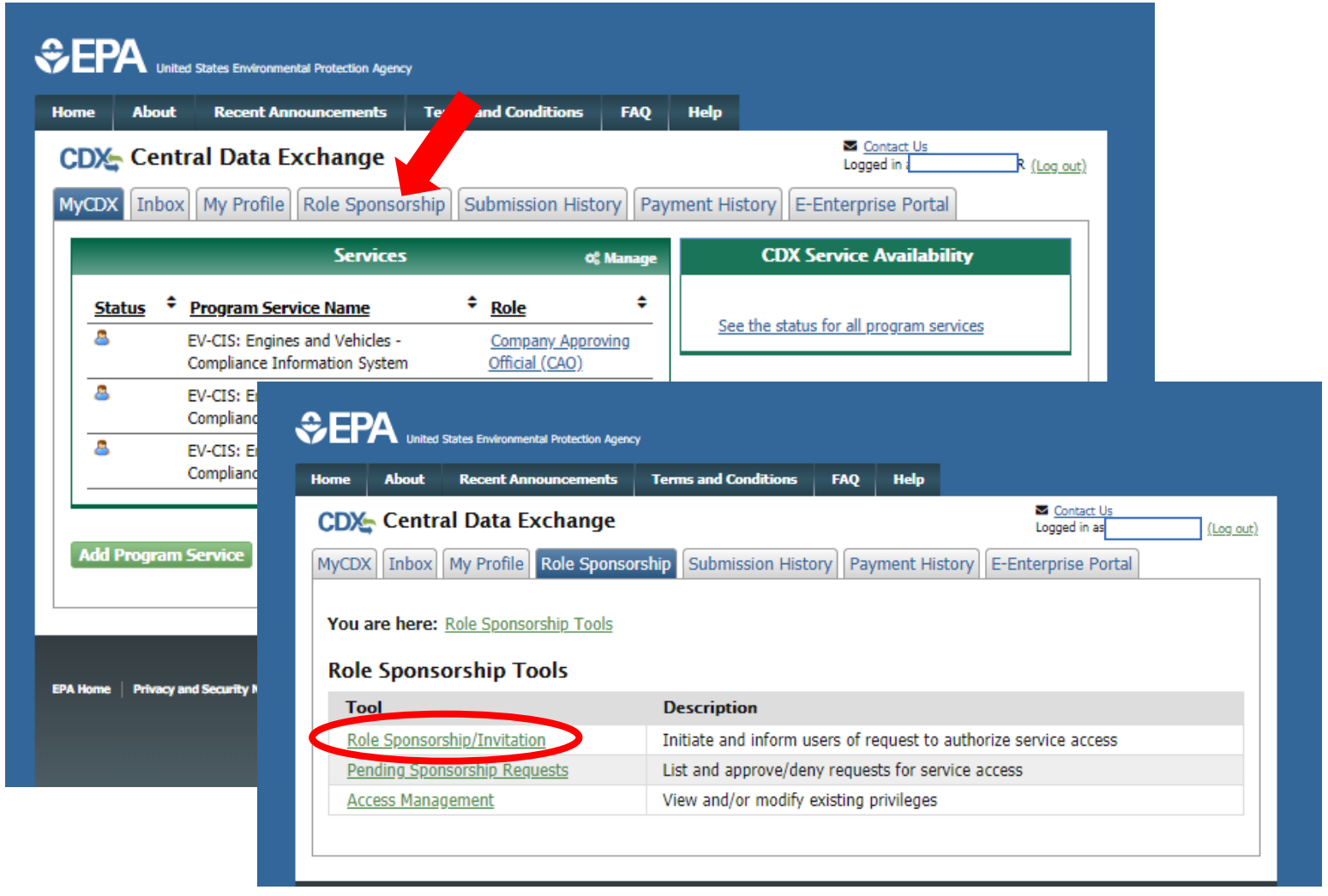
Part 4 Scenario B: CAO Sponsors New Role For Existing CDX User

Section 1 of 4:
CAO Invites User With Existing EV-CIS CDX Account To Add New Role (CROMERR Signer Or Submitter)

Part 4 Scenario B: CAO Sponsors New Role For Existing CDX User

CAO Begins New "Role Sponsorship" Invitation

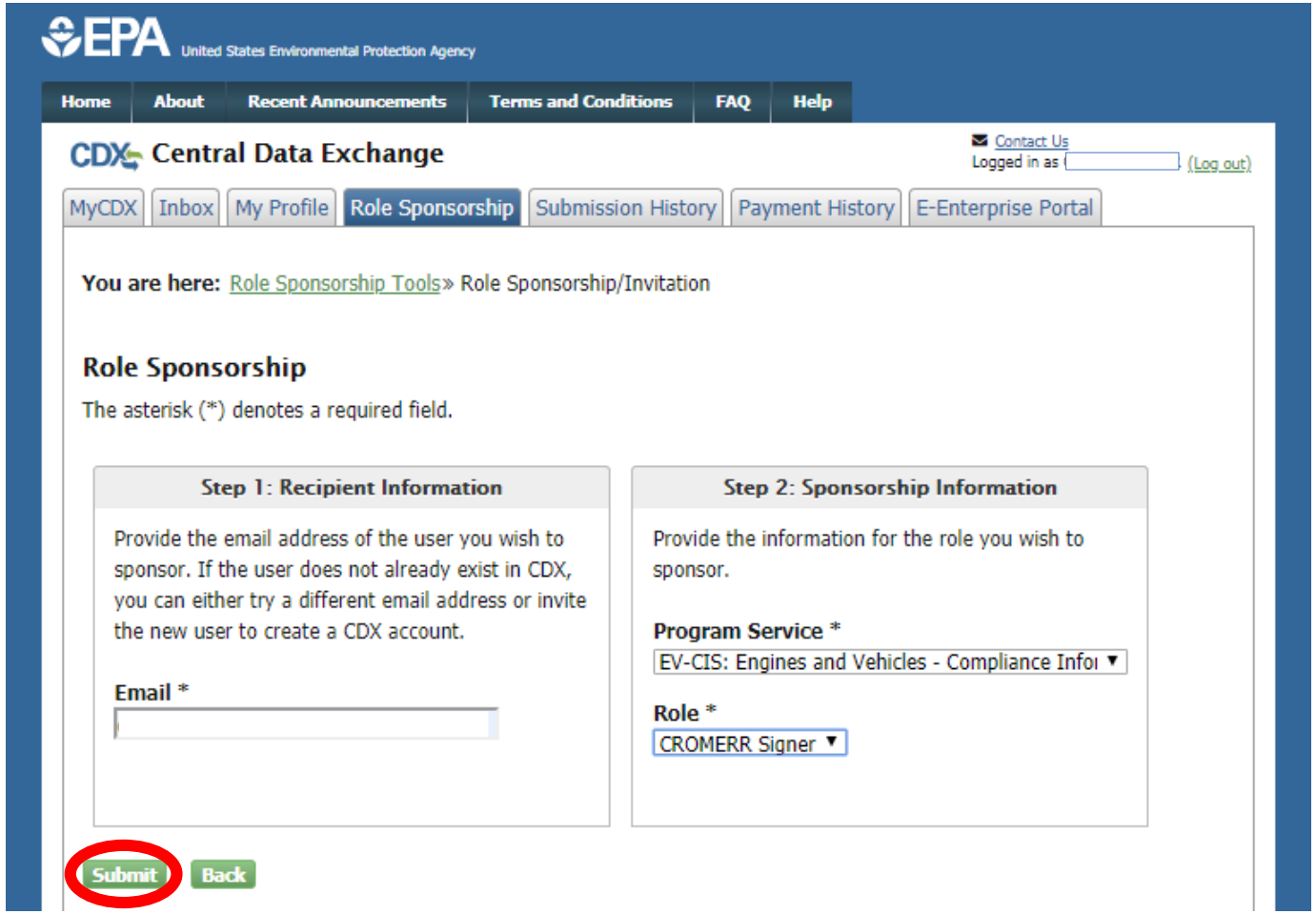
- CAO logs in to CDX
- Click on "Role Sponsorship" tab
  - This tab is only visible for users with CAO role
- Click on "Role Sponsorship/Invitation" link



Part 4 Scenario B: CAO Sponsors New Role For Existing CDX User

CAO Provides Role Sponsorship Information

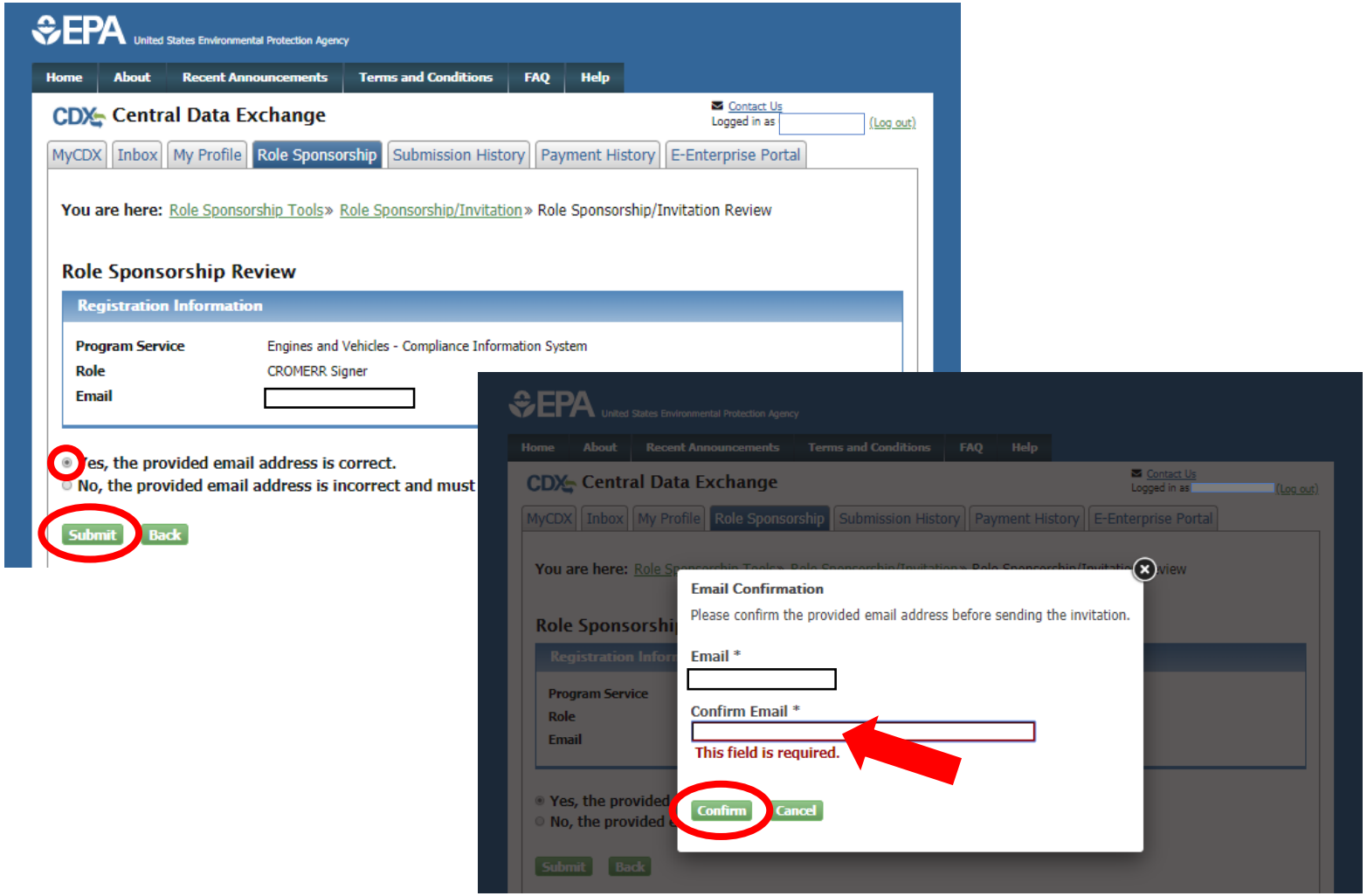
- Type sponsored user's email address
- Select "EV-CIS" for Program Service
- Select the desired new role (either Submitter or CROMERR Signer)
- Click the "Submit" button



Part 4 Scenario B: CAO Sponsors New Role For Existing CDX User

CAO Confirms Role Sponsorship Information

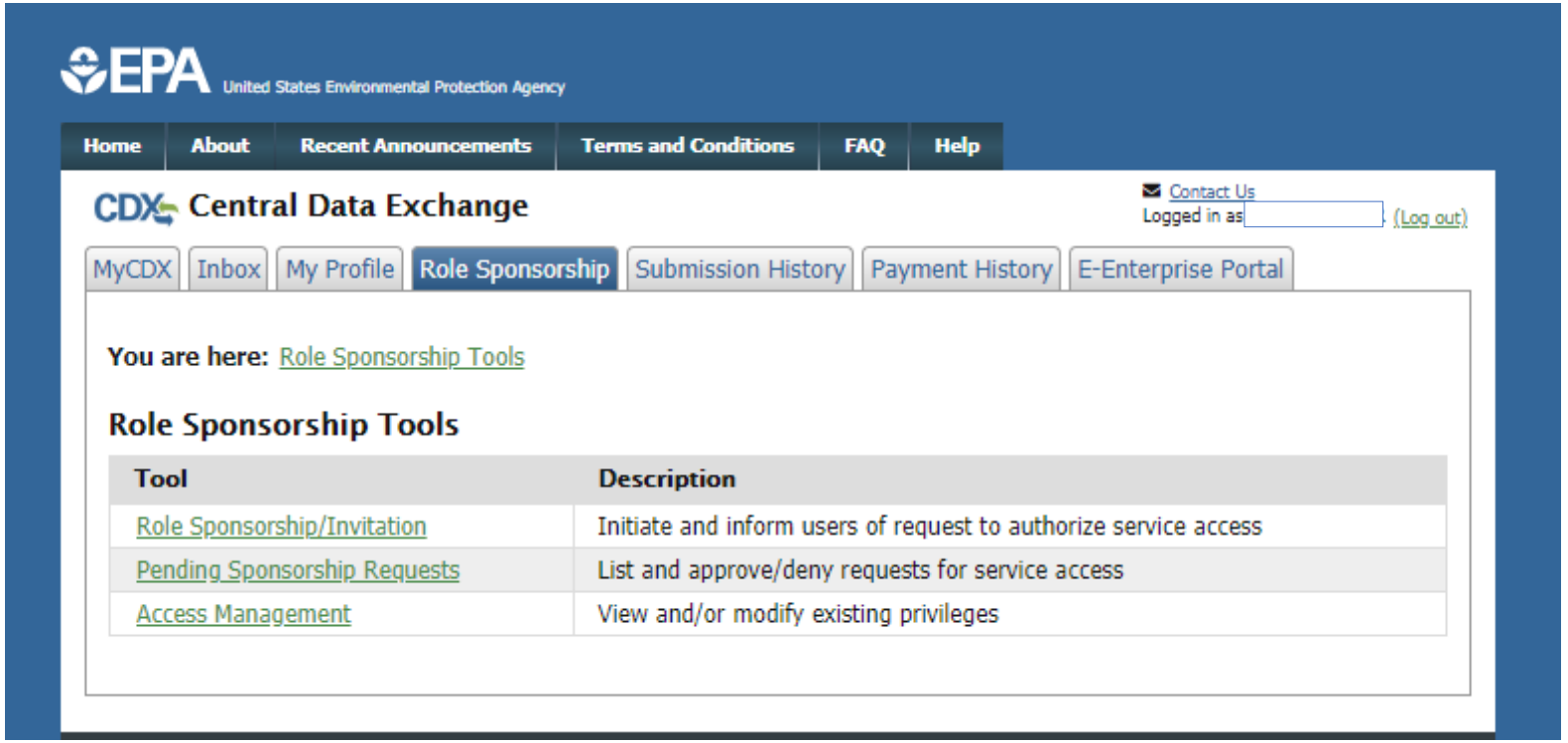
- Review the provided role sponsorship information
- Select “Yes, the provided email address is correct.”
- Click the “Submit” button
- Review the email of the sponsored user previously entered displayed in the pop-up window
- Re-type the email of the sponsored user
- Click the “Confirm” button



Part 4 Scenario B: CAO Sponsors New Role For Existing CDX User

CAO Completes Role Sponsorship Invitation

- After completing sponsorship request, you will be returned to the “Role Sponsorship” tab.
- Sponsored User must now act on email they receive before CAO is prompted to complete their next step of the process



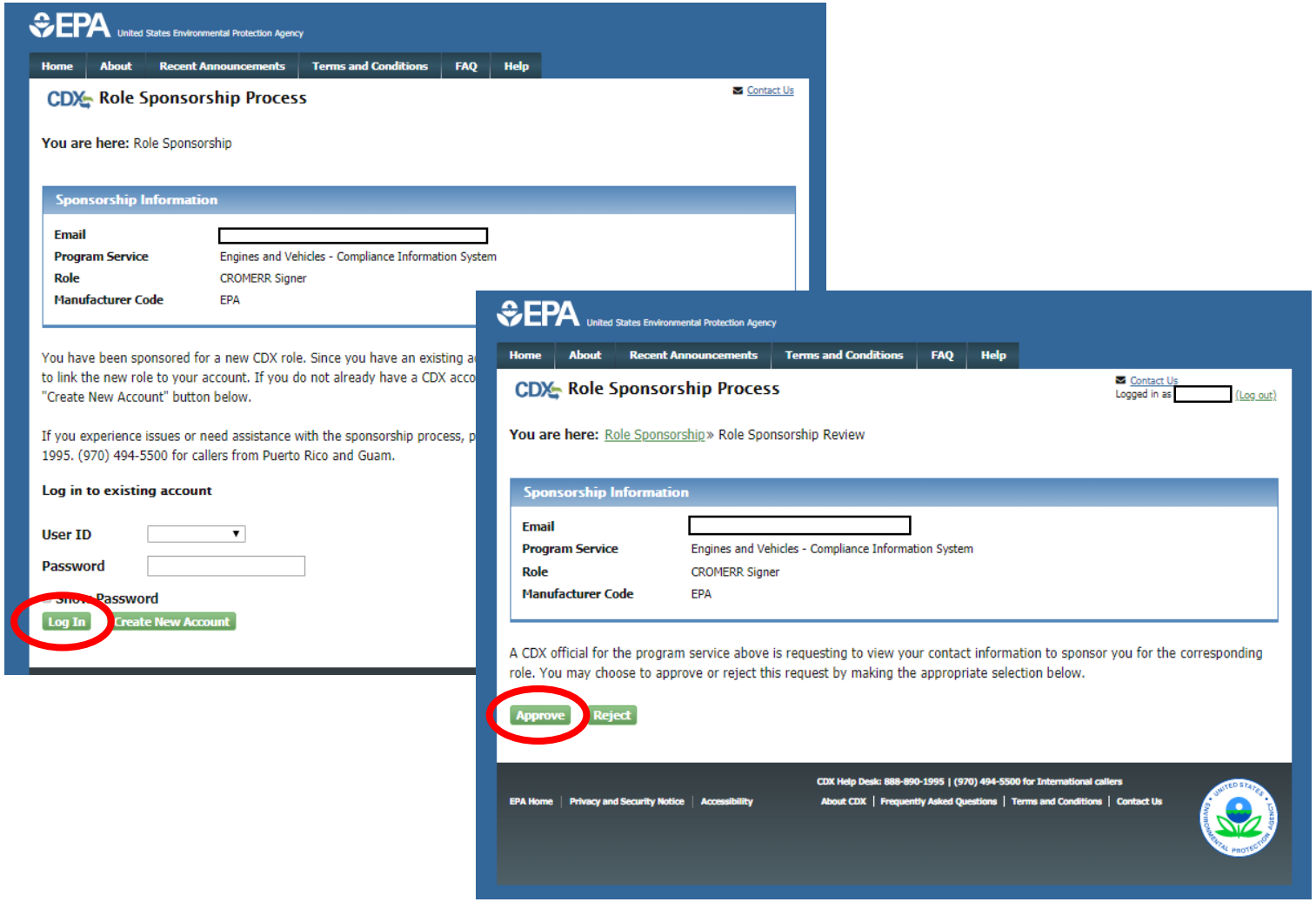
Part 4 Scenario B: CAO Sponsors New Role For Existing User

Section 2 of 4:
Sponsored User Accepts CAO Invitation To Add New Role

Part 4 Scenario B: CAO Sponsors New Role For Existing CDX User

Sponsored User Reviews Role Invitation

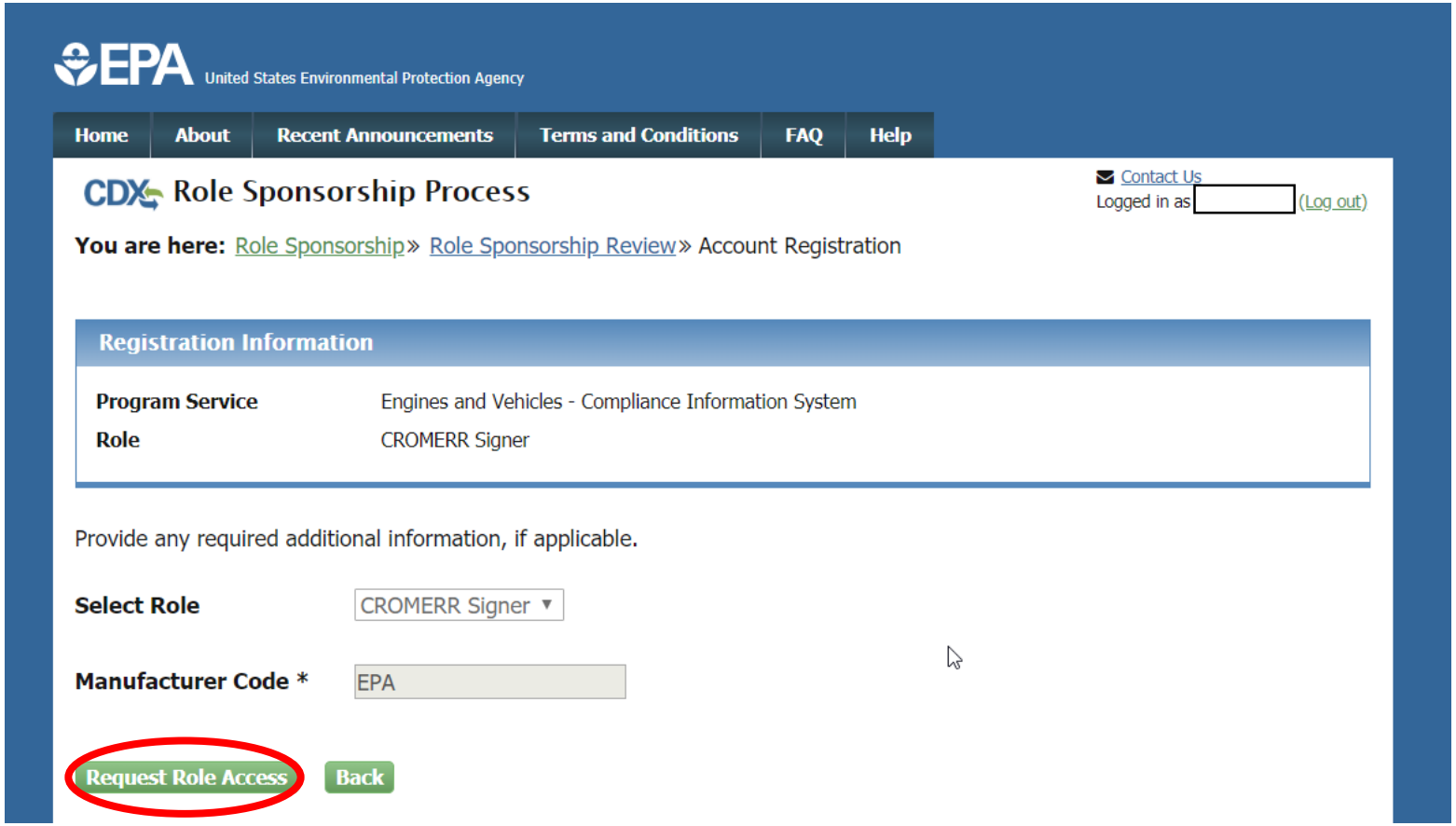
- Click the "Review…" link in CDX Sponsorship Request email
- Type your User ID and Password
- Click "Log In"
- Review the Sponsorship information
- Click the "Approve" button



Part 4 Scenario B: CAO Sponsors New Role For Existing CDX User

Sponsored User Requests Role Access

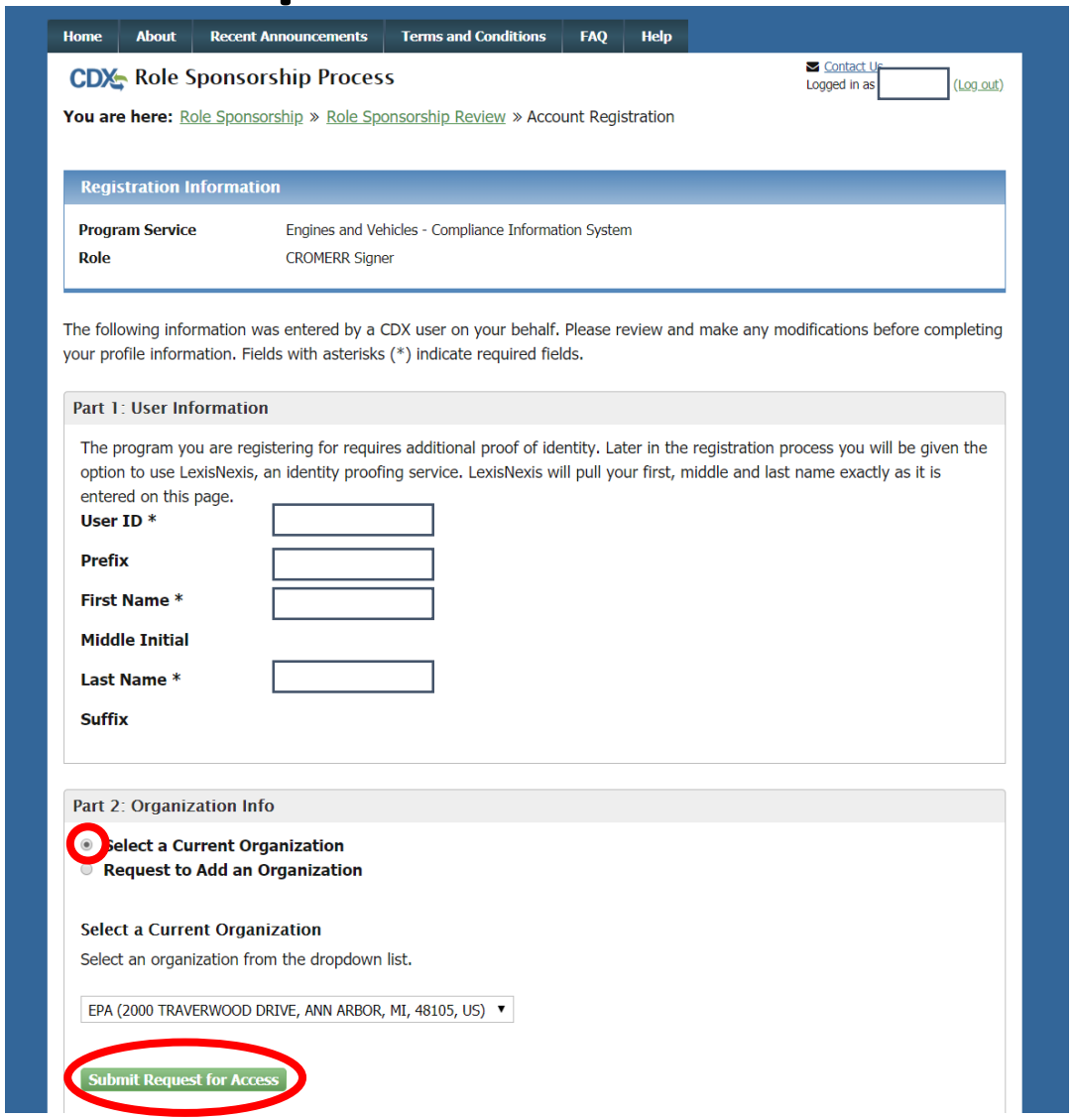
- Review the assigned Role and Manufacturer Code
- Click the “Request Role Access” button
- Note- These values are pre-populated from the CAO’s sponsorship request and cannot be modified here



Part 4 Scenario B: CAO Sponsors New Role For Existing CDX User

Sponsored User Submits Request For New Role

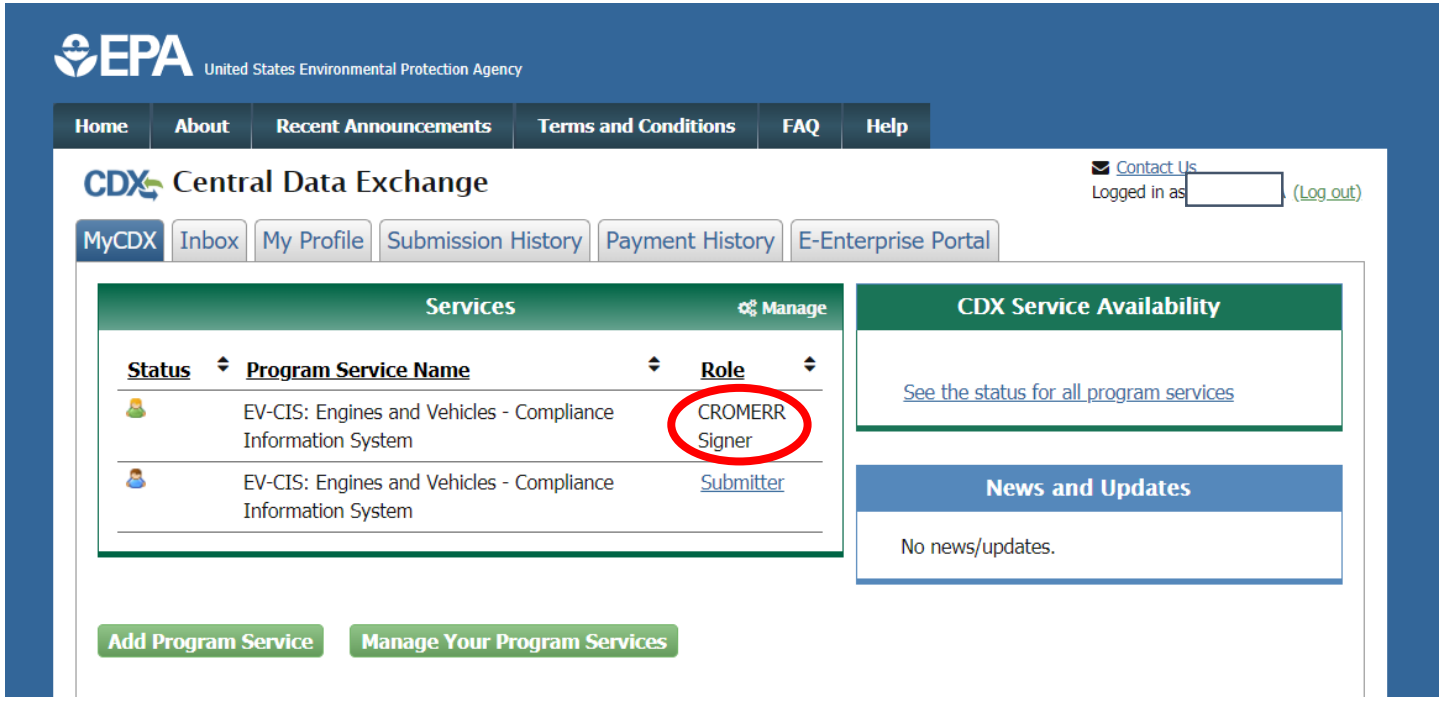
- Review pre-populated account User Information
- Click “Select a Current Organization”
- Click “Submit Request For Access” button



Part 4 Scenario B: CAO Sponsors New Role For Existing CDX User

Sponsored User Waits For CAO To Take Next Step

- After submitting the request for a new role, you will be returned to the "MyCDX" screen where the new role will be visible but not active
- Your CAO must now act on the email they receive before you can complete the process



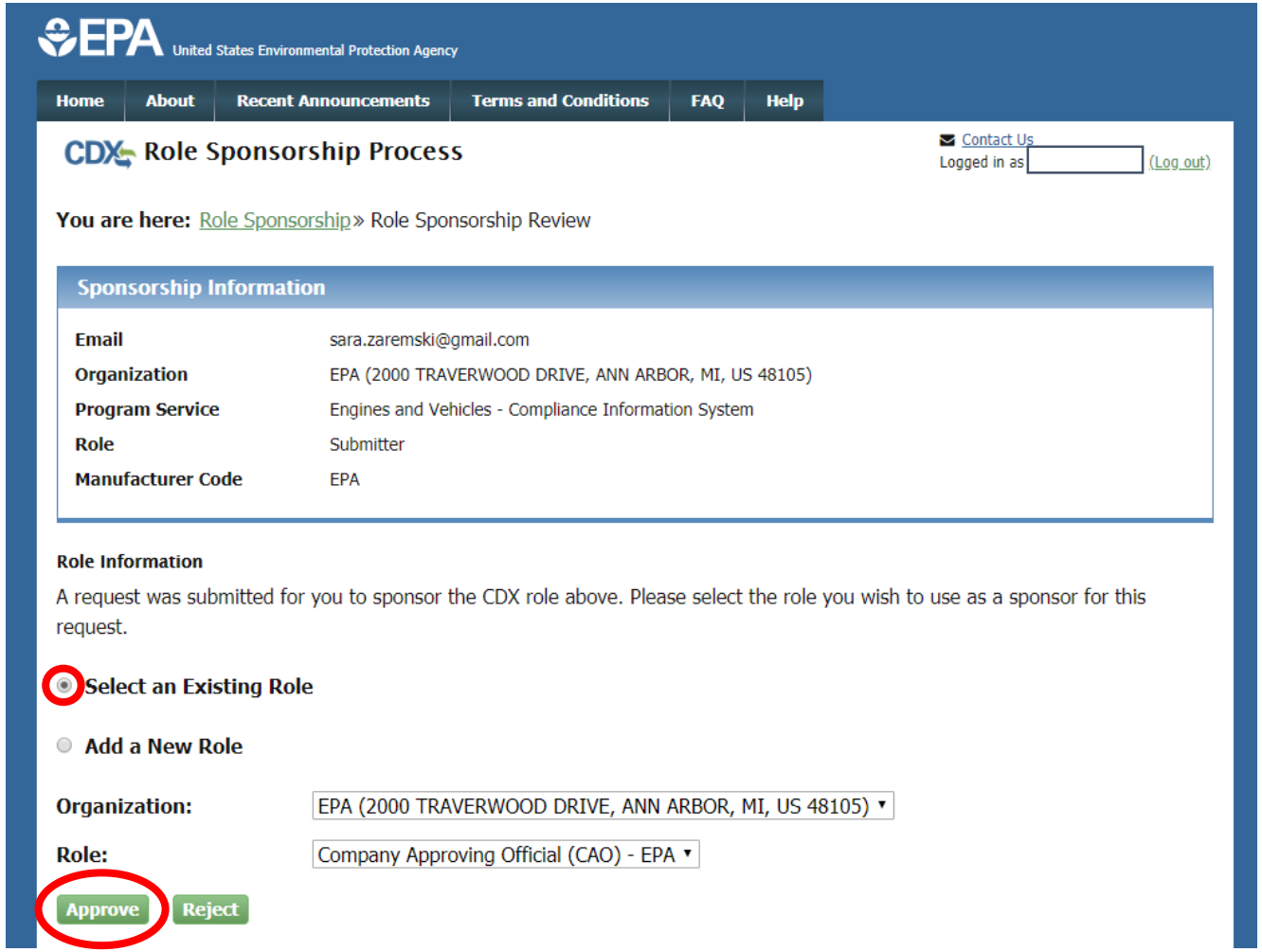
Part 4 Scenario B: CAO Sponsors New Role For Existing User

Section 3 of 4:
CAO Signs ESA Authorizing Sponsored User For The Requested Role

Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

CAO Approves Role Sponsorship Request From Email

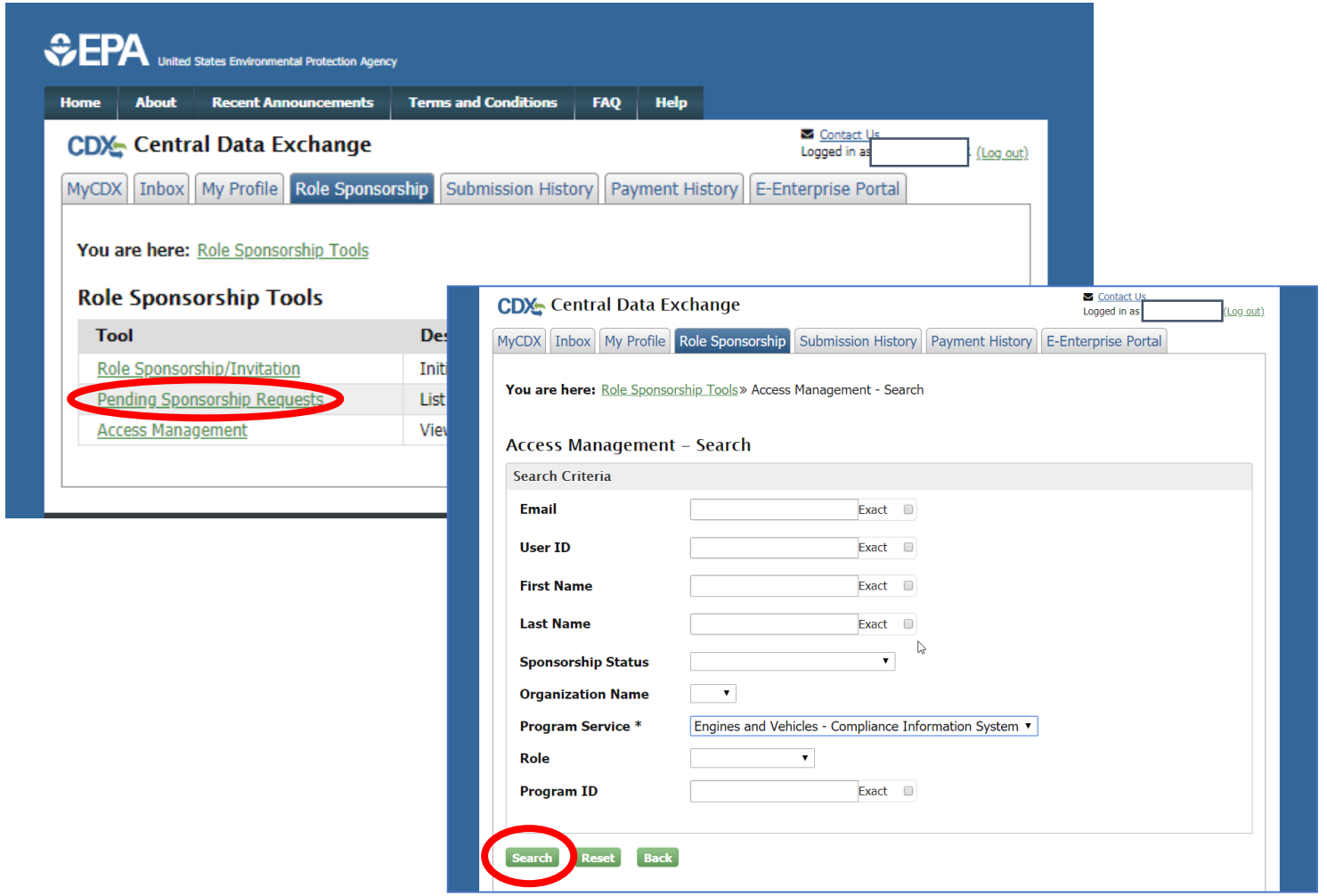
- Click the “Review…” link from CDX email
- Click “Select an Existing Role
- Select your Organization
- Select “CAO” for the Role that you will use to approve this request
- Click the “Approve” button



Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

CAO Searches For Pending Role Sponsorship Request

- Alternatively, click on the Role Sponsorship tab
- Click on “Pending Sponsorship Requests” link
- Select “Engines and Vehicles – Compliance Information System” for Program Service
- Click on “Search” button



Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

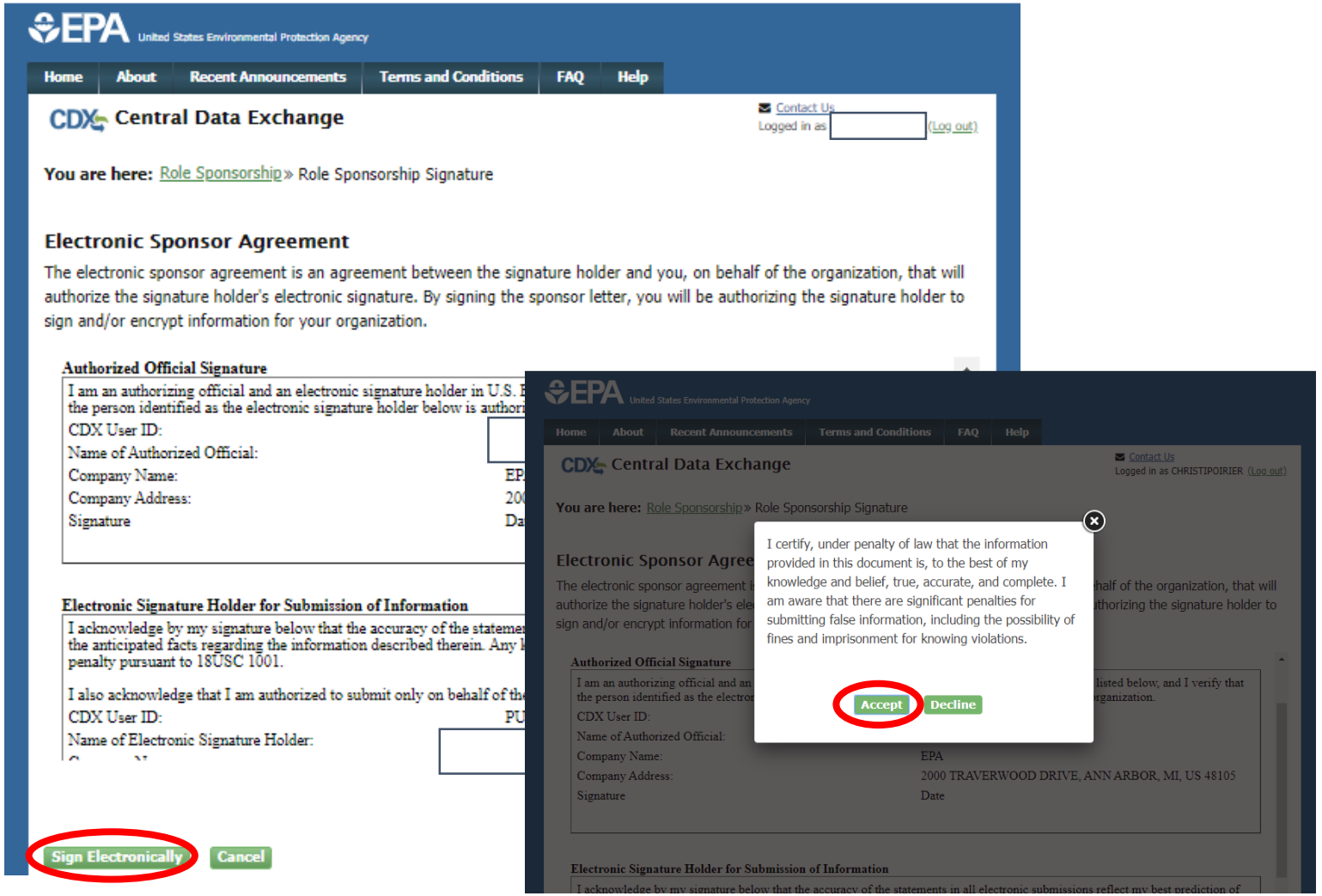
CAO Approves Pending Role Sponsorship Request From Search Results

- Click “Approve” (or “Reject”) in the Actions column for the desired pending request

Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

CAO Signs ESA For This Sponsorship Request

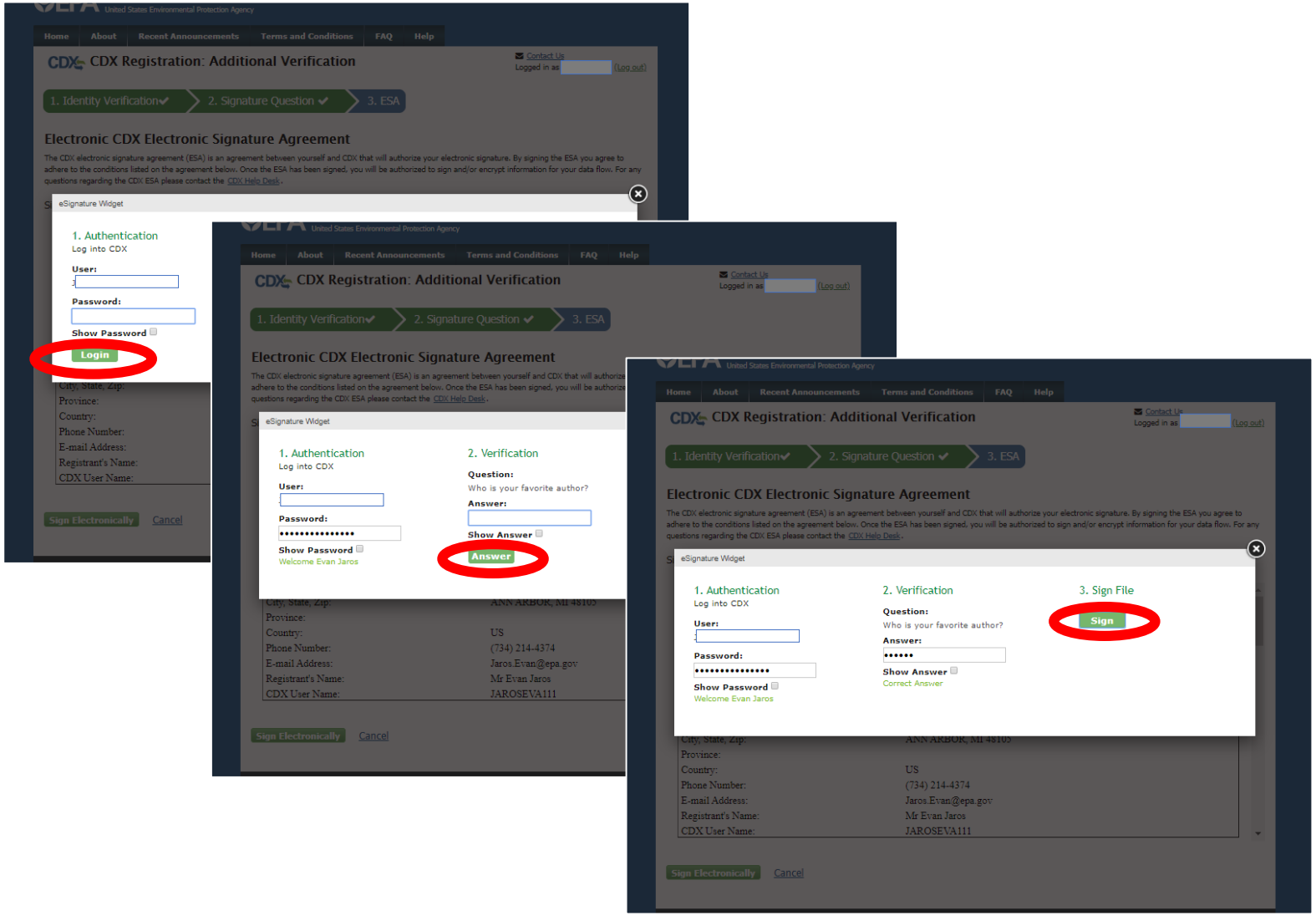
- Review ESA
- Click “Sign Electronically” button
- Review attestation statement
- Click the “Accept” button in the pop-up window



Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

CAO Signs ESA For This Sponsorship Request

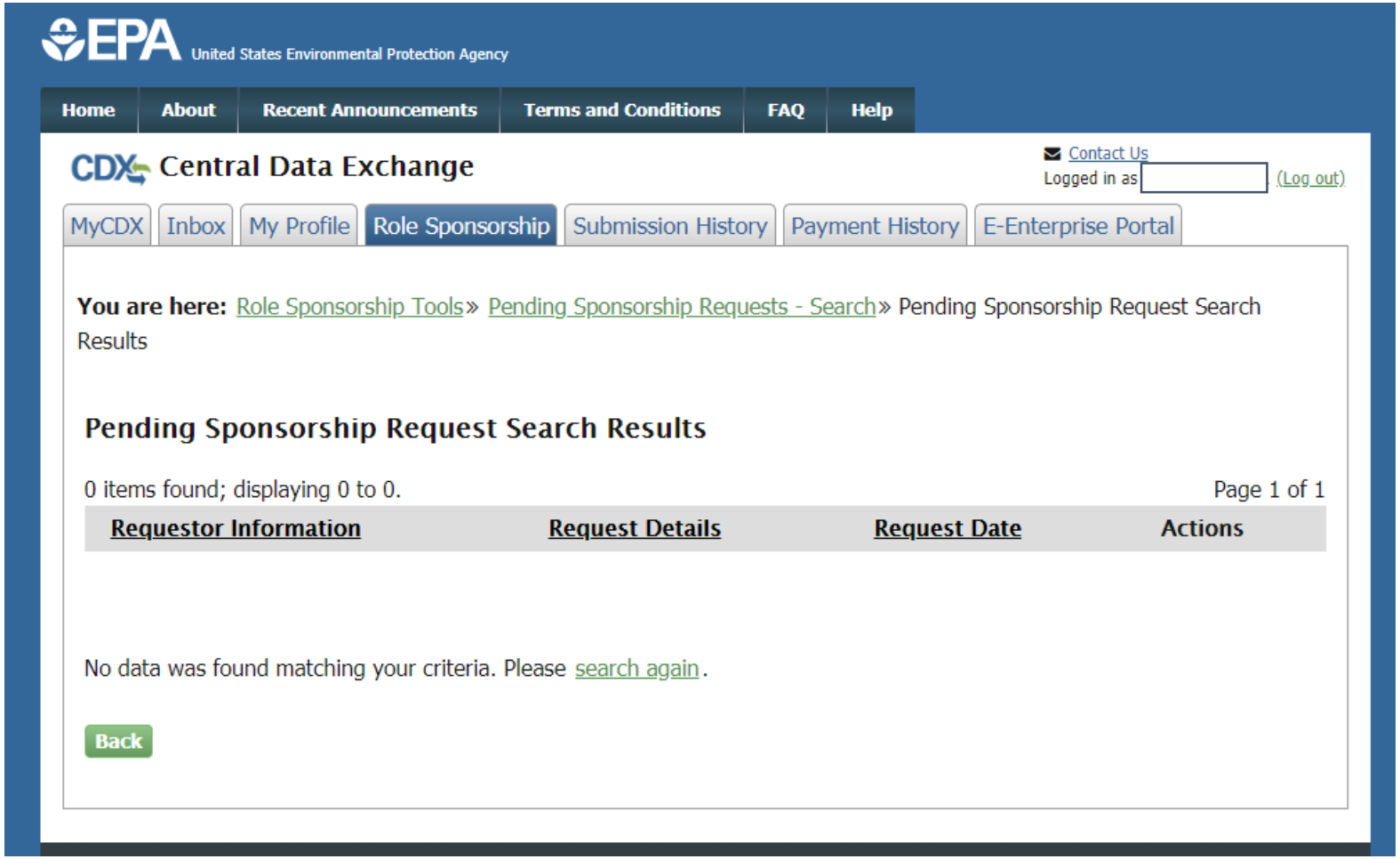
- This is a three-step window.
  1. Type Password and click the “Login” button
  2. Answer security question and click the “Answer” button
  3. Click the “Sign” button



Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

CAO Approves This Sponsorship Request

- After signing ESA, you will be returned to the “Role Sponsorship” tab and no further action is necessary by CAO for this sponsorship
- If the Submitter Role was being added, this is the last step and the new role should now be active. If the CROMERR Signer Role was being added, the next section outlines the final Identity Verification and ESA steps to be taken by the Sponsored User.



Part 4 Scenario B: CAO Sponsors New Role for Existing User

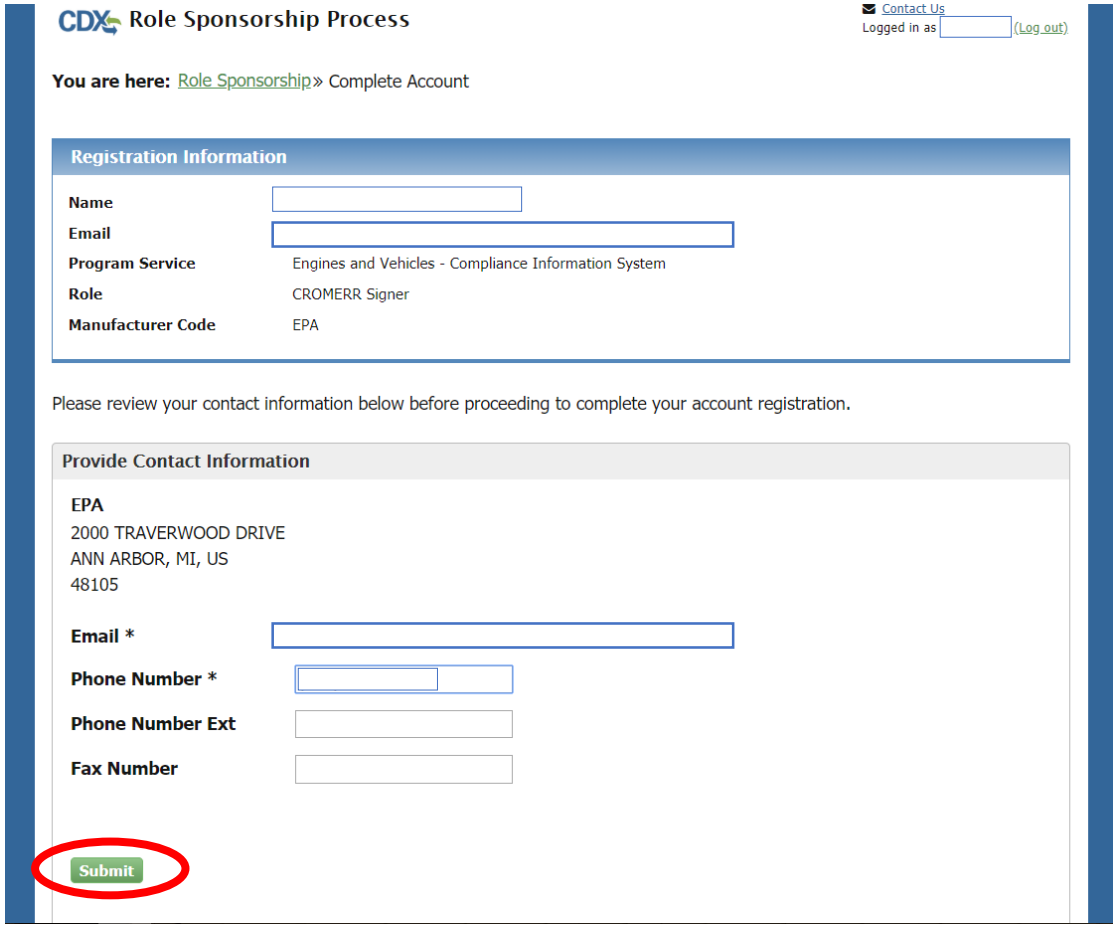
Section 4 of 4:
Sponsored User Completes CROMERR Signer Role Activation By Completing Electronic Identity Verification and Signing ESA

Note: This section is not required for Submitter Role or if Identity Verification was already completed as part of CAO role approval.

Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

Sponsored User Reviews Account Information

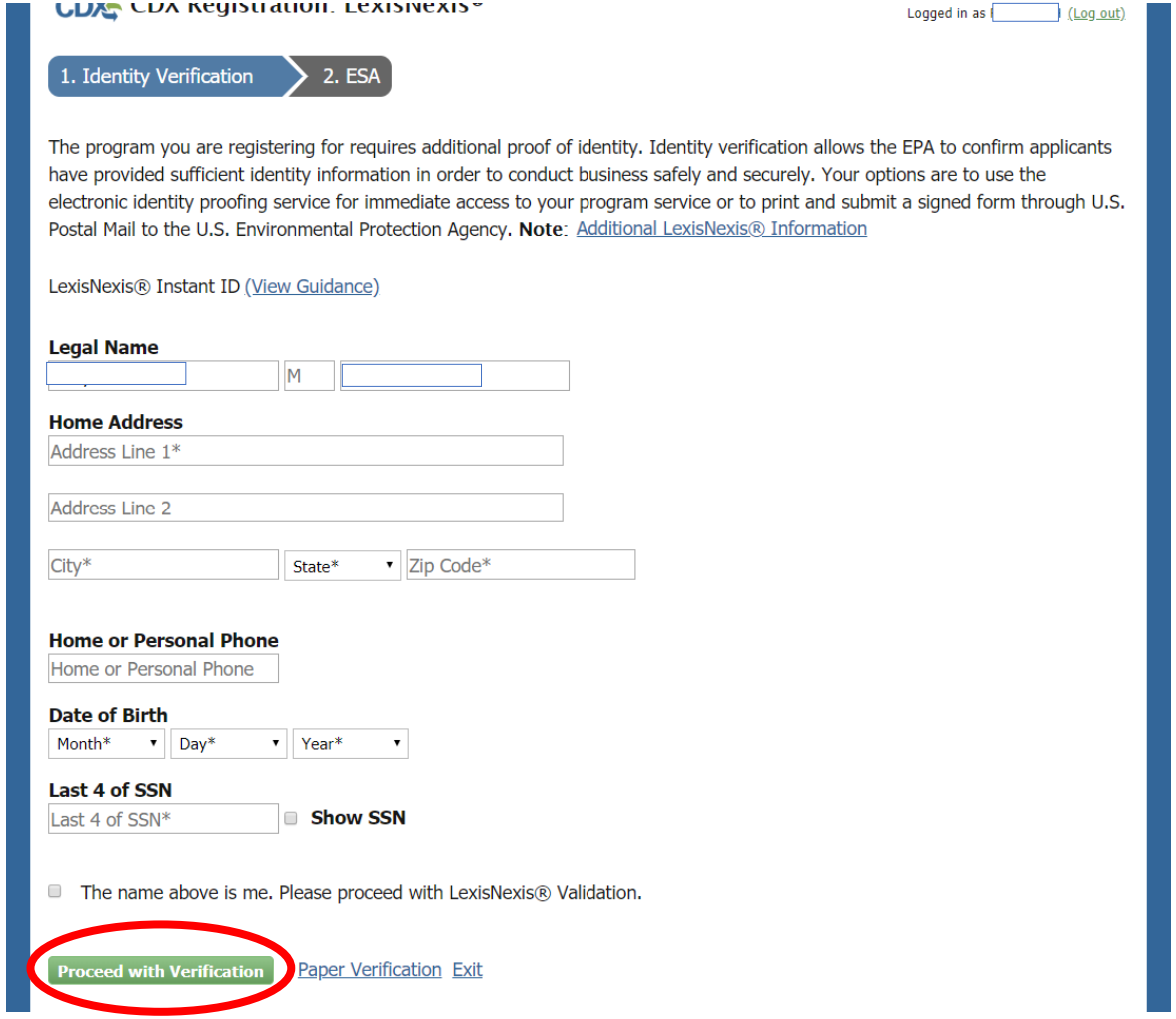
- Click “log in…” link from CDX email
- Log in to CDX
- Review pending role sponsorship and contact information
- Click “Submit” button



Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

Sponsored User Provides Identity Verification Information

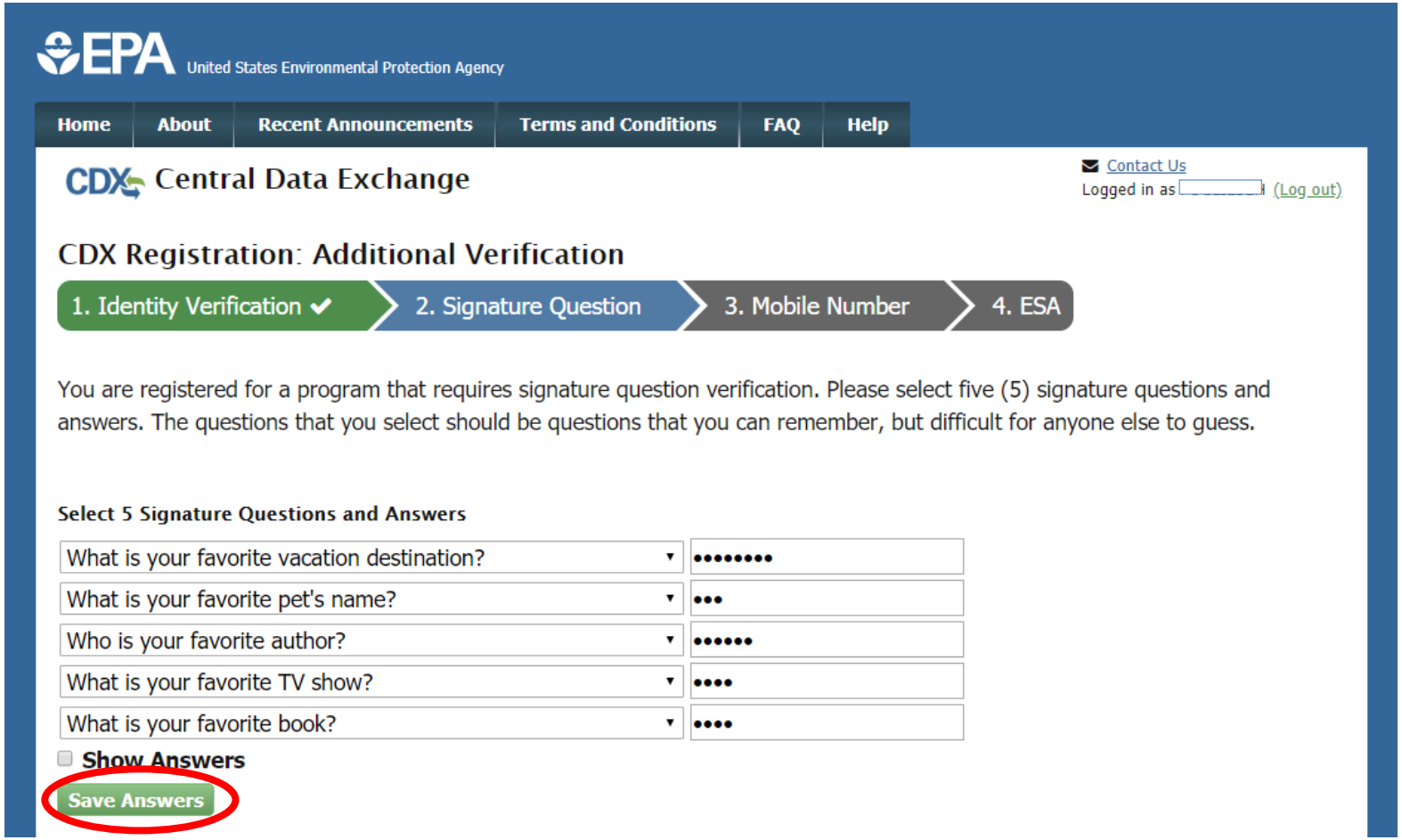
- Review/Provide required personal information for electronic identity verification
- Check the box next to “The name above is me. Please proceed with LexisNexis Validation.”
- Click “Proceed with Verification”



Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

Sponsored User Selects Signature Questions

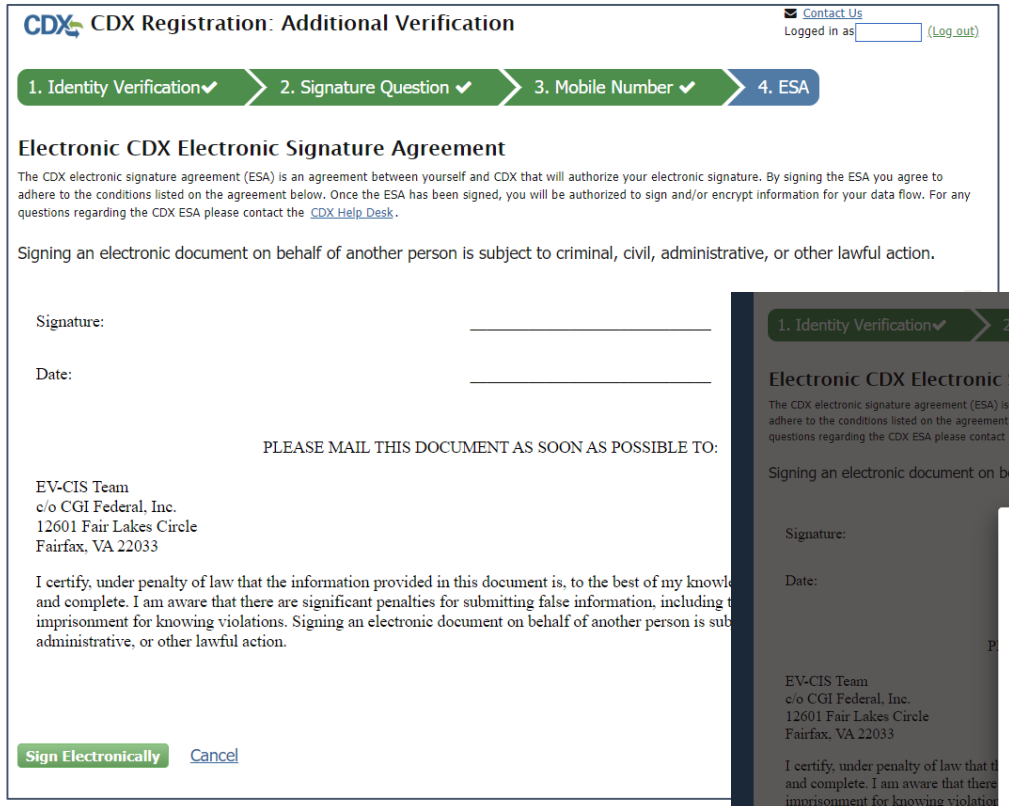
- Select five security questions from the dropdowns
- Provide the answer for each selected question
- Click “Save Answers” button

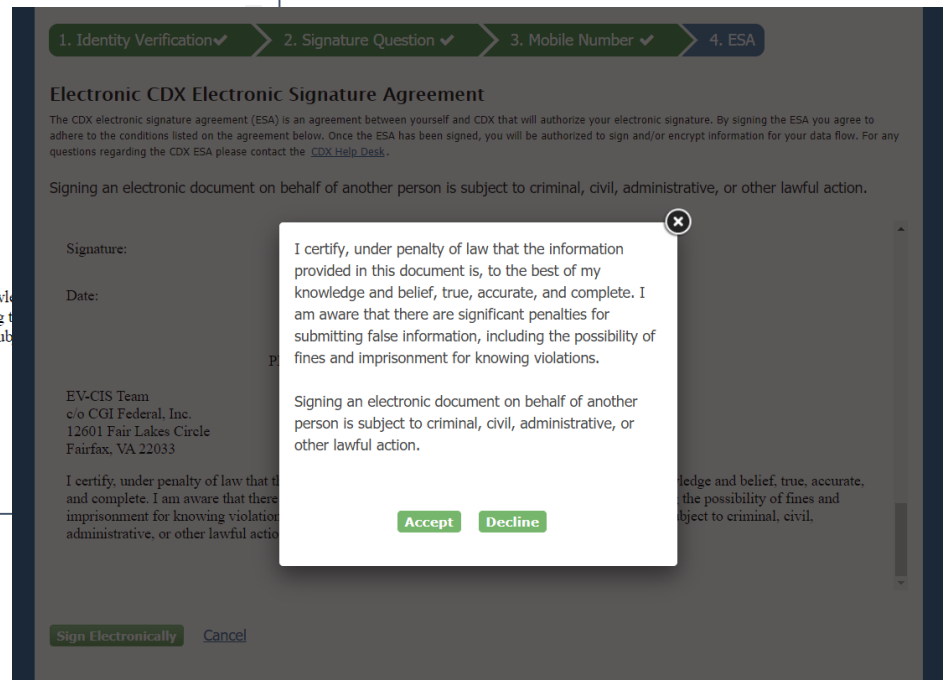


Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

Sponsored User Reviews ESA

- Review Electronic Signature Agreement (ESA)
- Click “Sign Electronically”
- Review Attestation statement
- Click “Accept”

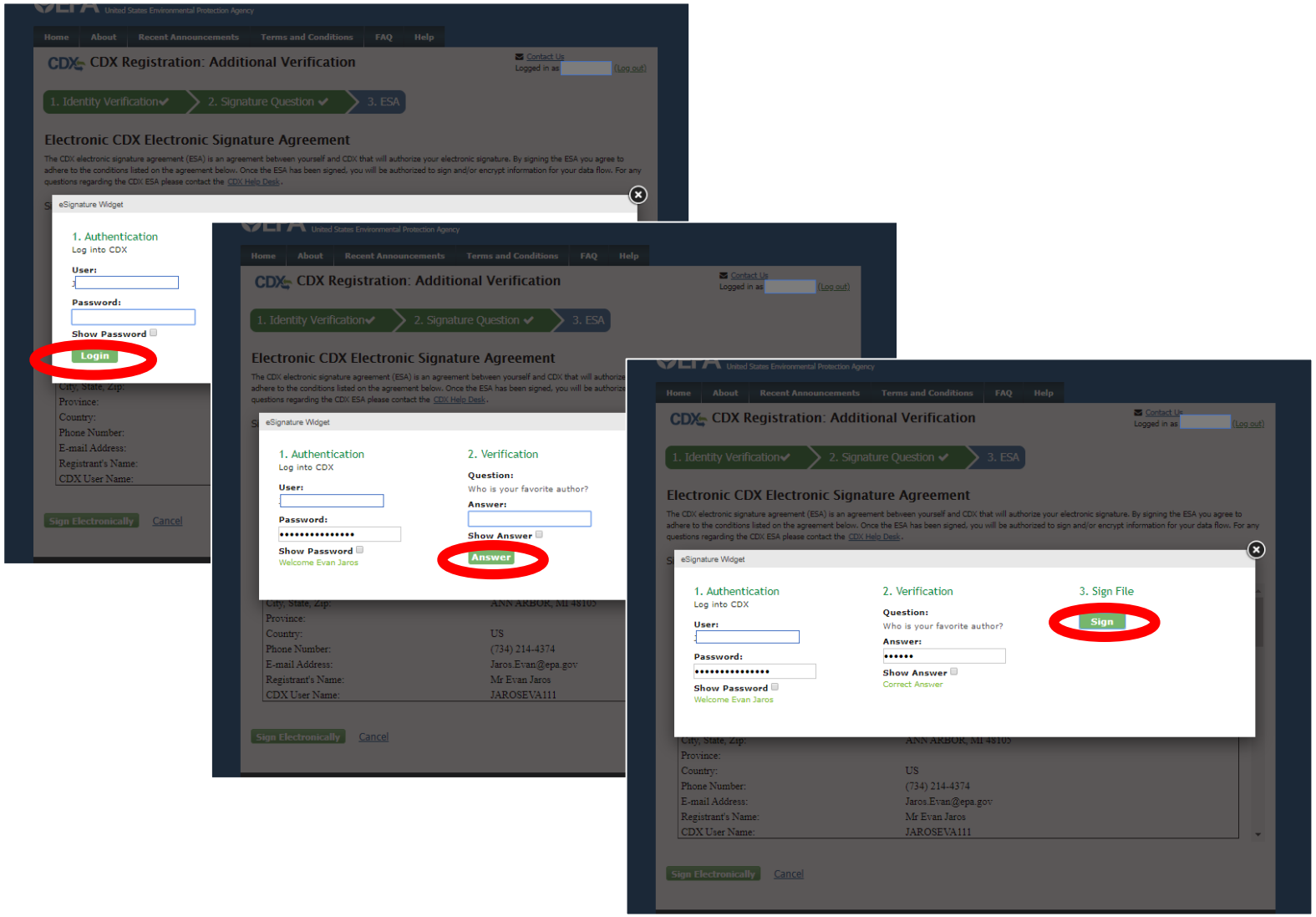




Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

Sponsored User Signs ESA

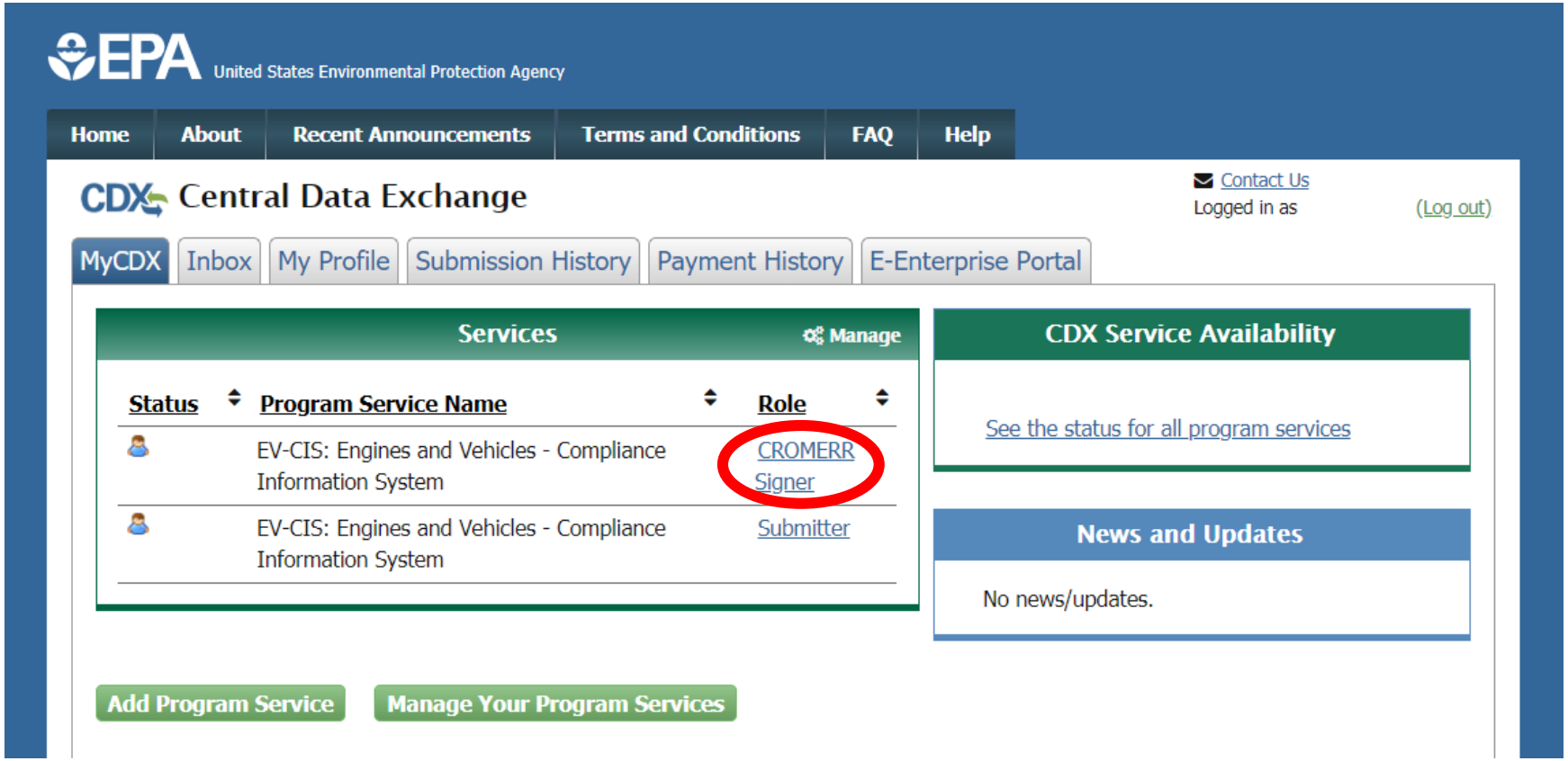
- This is a three-step window.
  1. Type Password and click “Login”
  2. Answer security question and click “Answer” button
  3. Click “Sign” button



Part 4 Scenario B: CAO Sponsors New Role for Existing CDX User

Sponsored User Completes Role Sponsorship Process

- After completing electronic identity verification and ESA process, you will be returned to the “MyCDX” page
- Your new CROMERR Signer role will now be active



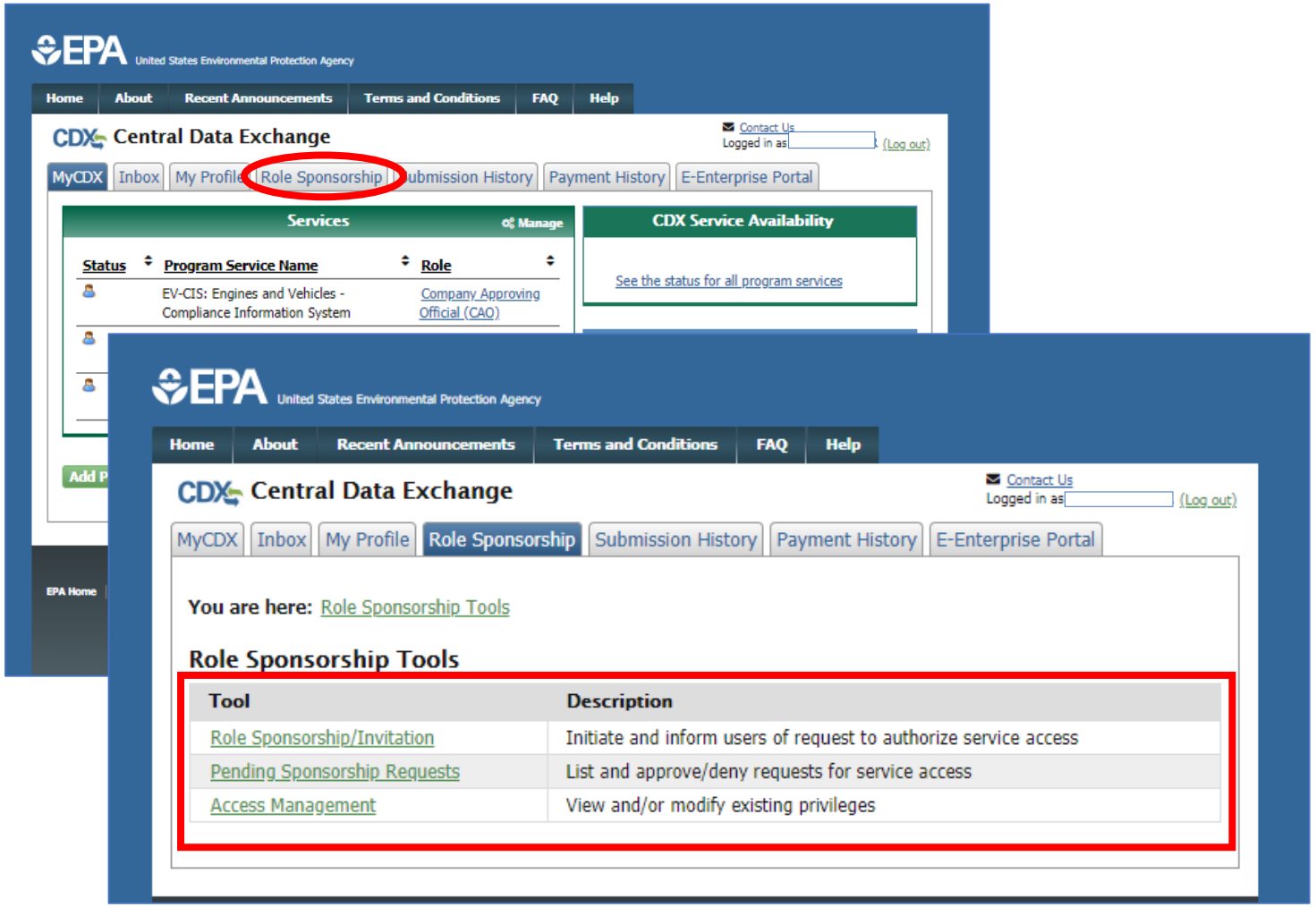
Part 5:

Tools for CAOs

Part 5: Tools for CAOs

Role Sponsorship Tab For CAOs

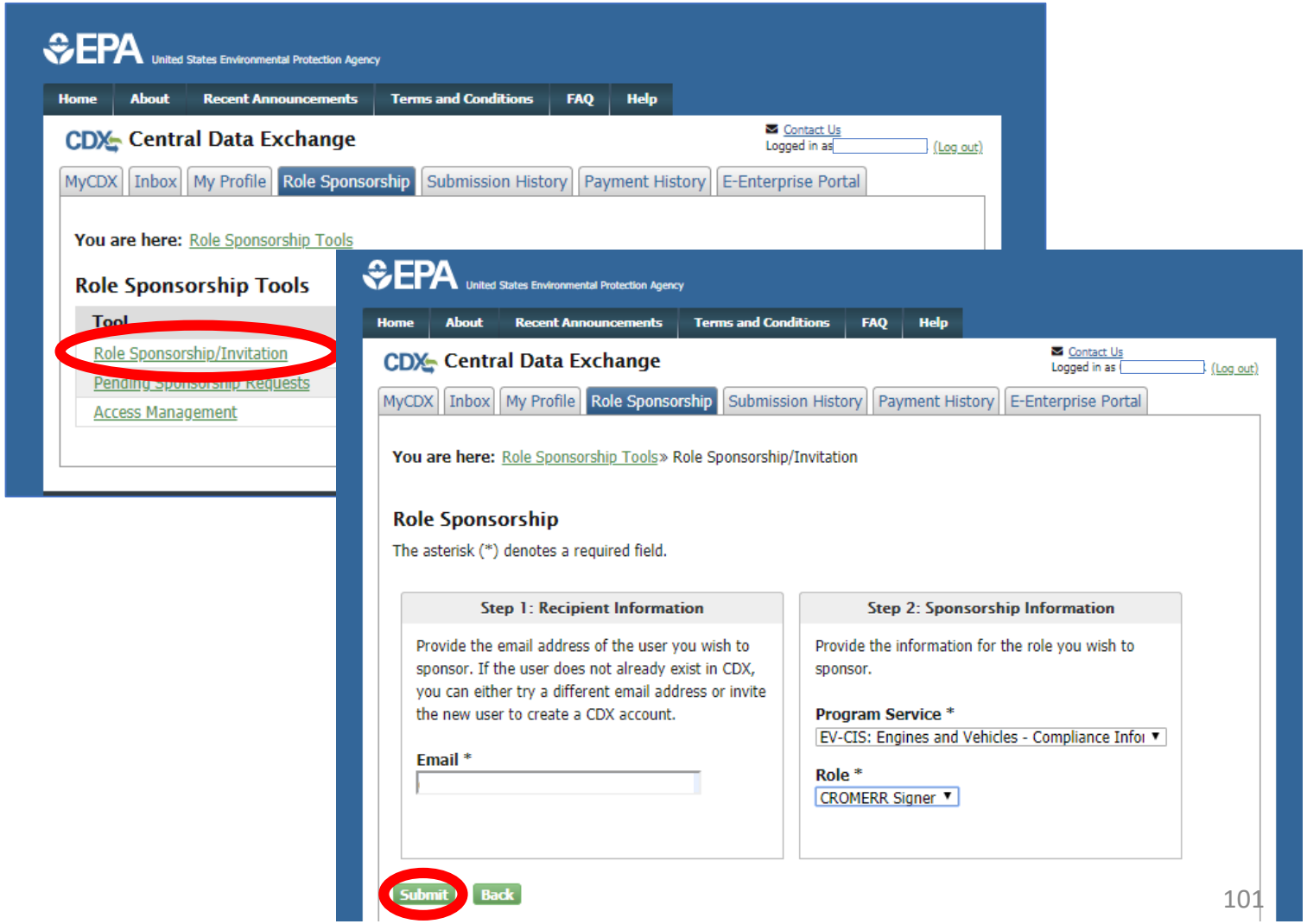
- The “Role Sponsorship” tab will be visible to any EV-CIS user with CAO role
- There are three tools to assist with CAO Role Sponsorship responsibilities:
    1. Role Sponsorship/Invitation *(Send invitation for new CDX user or new EV-CIS role)*
    2. Pending Sponsorship Requests *(Search for pending sponsorship requests)*
    3. Access Management *(Revoke/Reactivate user roles)*



Part 5: Tools for CAOs

Tool 1: Role Sponsorship/Invitation

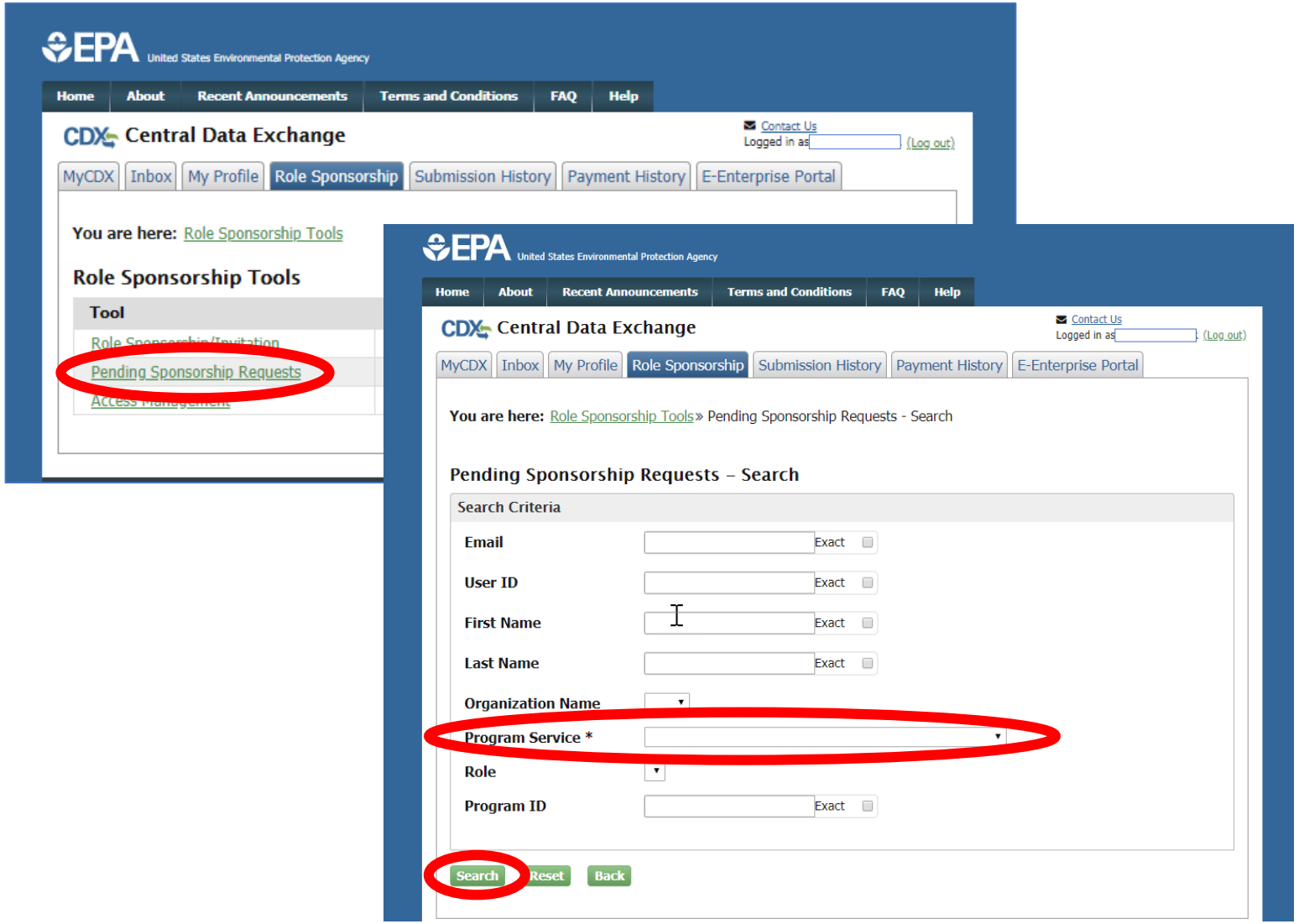
- Click on “Role Sponsorship/Invitation” link
- Enter email of user you wish to sponsor for new CDX account or new role
- Select “Engines and Vehicles – Compliance Information System” for Program Service
- Select the role for this user (Submitter or CROMERR Signer)
- Click the “Submit” button



Part 5: Tools for CAOs

Tool 2: Pending Sponsorship Requests

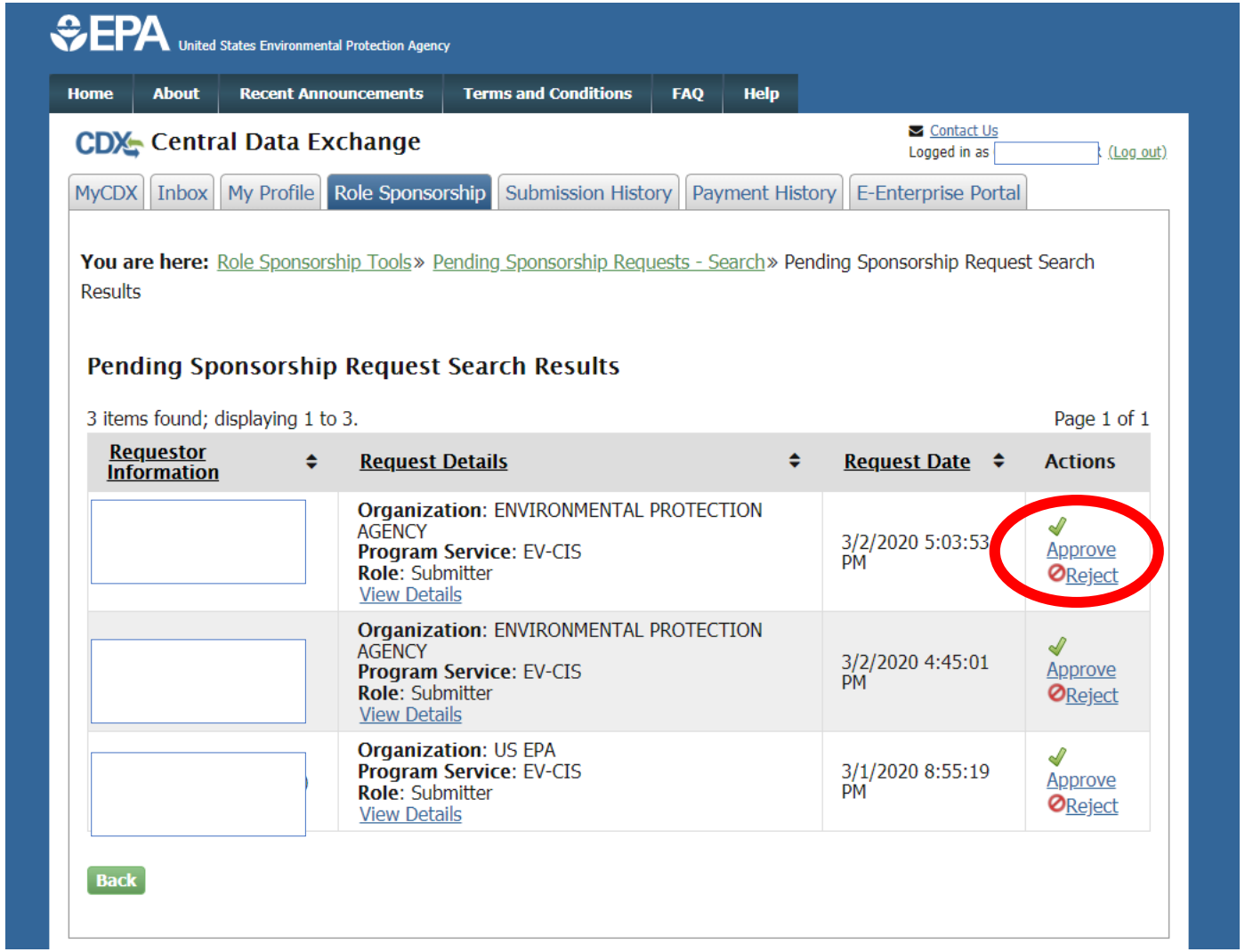
- Click on “Pending Sponsorship Requests” link
- Select “Engines and Vehicles – Compliance Information System” for Program Service
- Enter any additional search criteria
- Click the “Search” button



Part 5: Tools for CAOs

Tool 2: Pending Sponsorship Requests

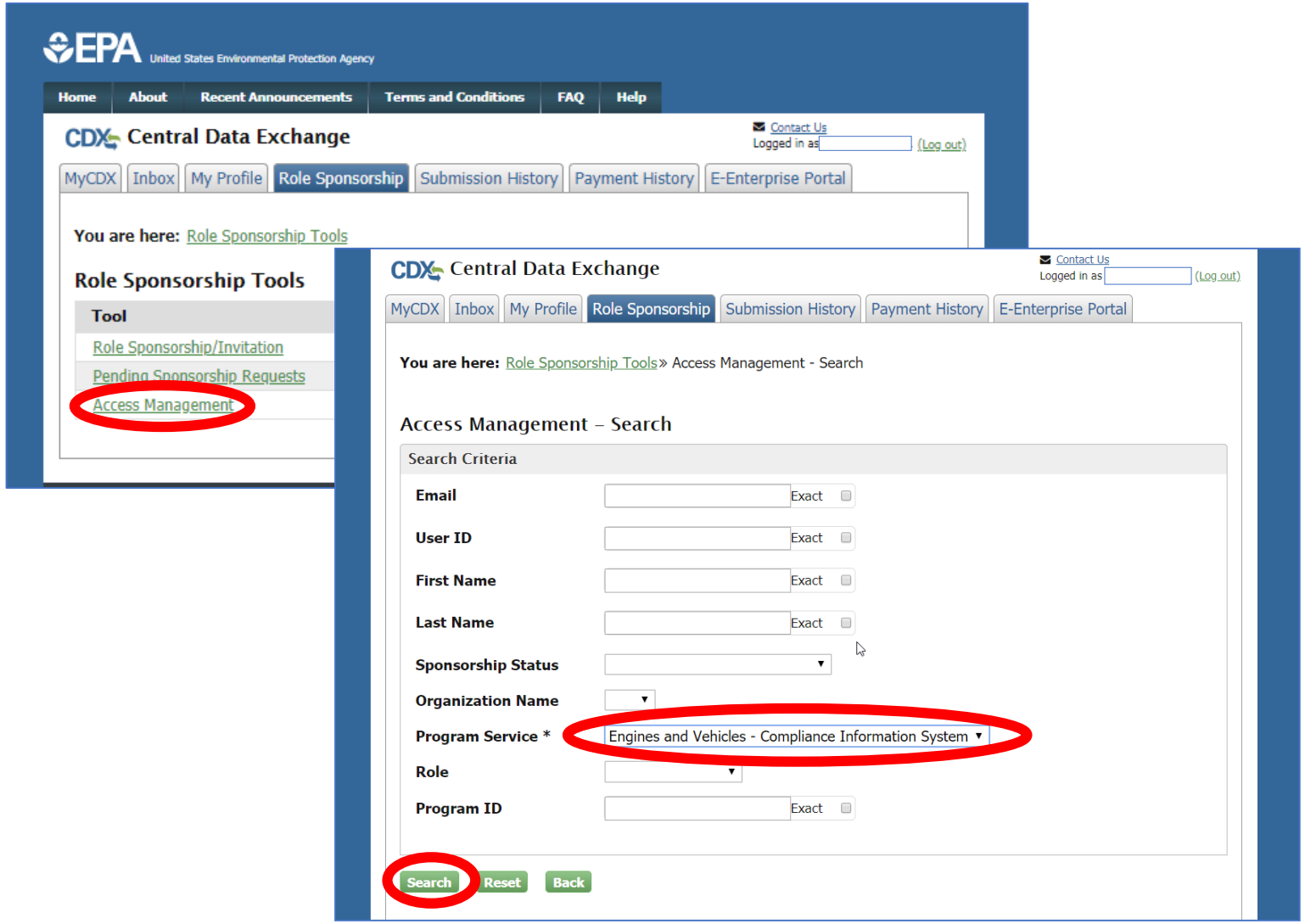
- CAOs will see all pending sponsorship requests for all users for their company (i.e., with the same Manufacturer Code) regardless of which CAO sponsored the user
- CAOs can “Approve” or “Reject” any sponsorship request for any user



Part 5: Tools for CAOs

Tool 3: Access Management

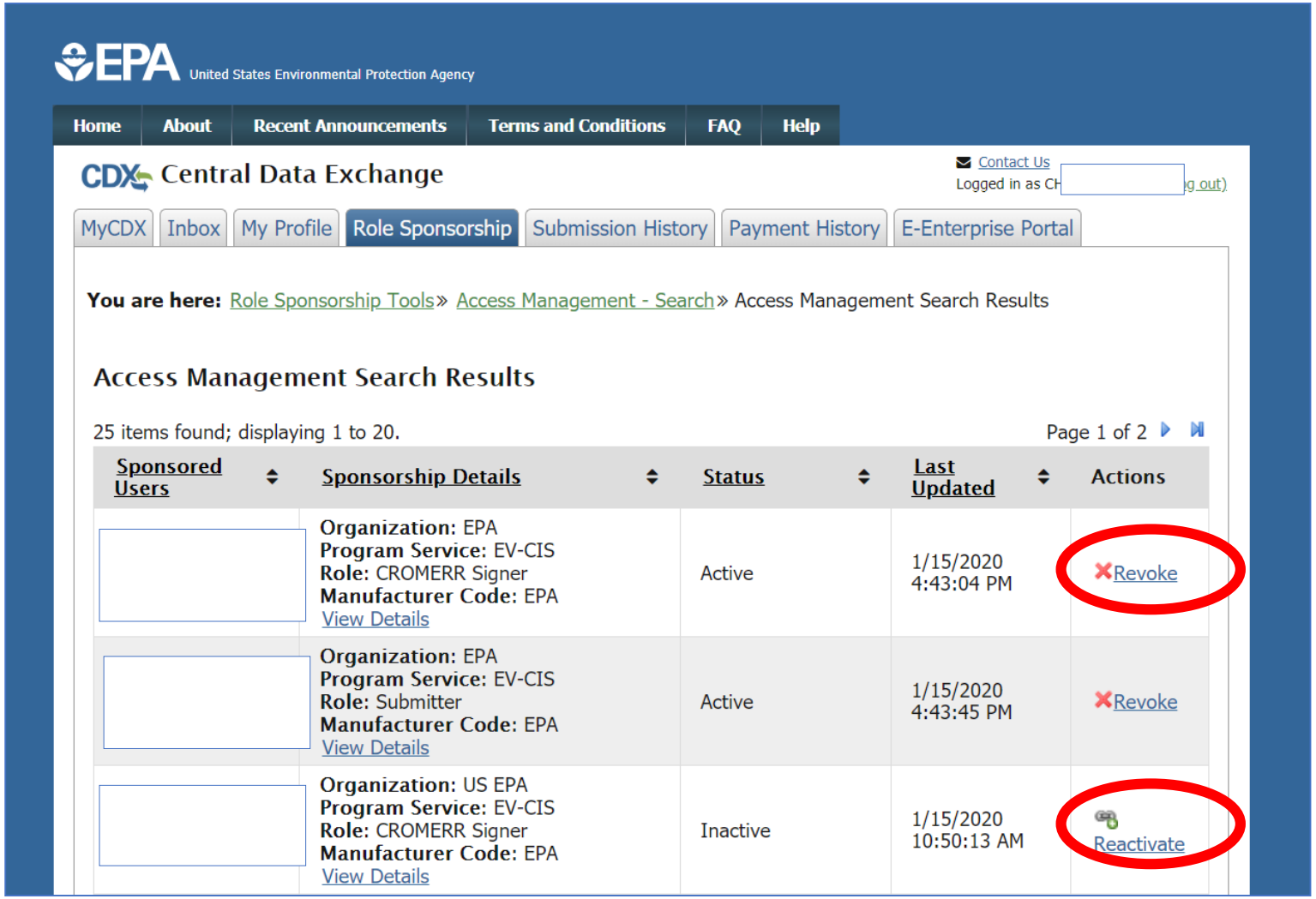
- Click on “Access Management” link
- Select “Engines and Vehicles – Compliance Information System” for Program Service
- Enter any additional search criteria
- Click the “Search” button



Part 5: Tools for CAOs

Tool 3: Access Management

- CAOs will see all roles for all users for their company (i.e., with the same Manufacturer Code) regardless of which CAO sponsored a user
- CAOs can “Revoke” or “Reactivate” any role for any user



Appendix: General Resources

- EV-CIS Account Setup
  - https://www.epa.gov/ve-certification/account-setup-engines-and-vehicles-compliance-information-system-ev-cis
  - Documentation on the new process will be posted on this page when it is available
  - Questions regarding accounts and/or the new process can be sent to verify@epa.gov
- EV-CIS Listserver
  - https://lists.epa.gov/read/all_forums/subscribe?name=verify