

Office of Transportation and Air  
Quality Fuels Registration  
(OTAQREG)

Job Aid



## How to Edit Delegated User Roles in OTAQREG

This job aid is designed to provide a high-level overview of this task so that you can start using the redesigned OTAQREG system as quickly as possible.

### Before you begin:

1. You must have a Central Data Exchange (CDX) account
2. You must be logged into the CDX OTAQREG program service
3. You must be the Responsible Corporate Officer (RCO), Delegated RCO, or a delegated user of a registered company with a 4-digit EPA Company ID

For help with these steps, see the documentation on EPA's Fuels Registration, Reporting, and Compliance Help website:

<https://www.epa.gov/fuels-registration-reporting-and-compliance-help>

### Skip to instructions for:

- [Delegated user of the company](#)
- [RCO or Delegated RCO of the company](#)

# Submit Updated User Association Request as Delegated User

1. Click the **Company ID**
2. Select **Edit Roles**
3. Select or remove the appropriate roles
4. If you desire to disassociate from the company, please click the **Disassociate** button. (This option is only available for current Delegated Users and Delegated RCOs, not for RCOs)
5. Click **Save and Continue**

Steps continue on next slide...

**My Companies**

Show 10 entries Filter Companies:

Company ID	Company Name	Address	My Roles
2220	Company ABC	1200 ABC St, Fairfax, VA 22030, US	<ul style="list-style-type: none"><li>EMTS RFS Viewer</li><li>EMTS RFS Submitter</li><li>Company Editor</li></ul>

Previous 1 Next

**Additional Company/User Role Associations**

Will you be viewing ABT credit transaction via the EMTS application?  No

Will you ALSO be SUBMITTING ABT credit transaction via the EMTS application?  No

Will you be viewing RFS RIN transaction via the EMTS application?  No

Will you ALSO be SUBMITTING RFS RIN transaction via the EMTS application?  No

Will you be submitting compliance reports and other information on behalf of this company? If you have questions about what these reports entail, please see the OTAQ help page [here](#).  Yes

Will you need to just view this company's information?  No

Will you need to edit this company's information?  Yes

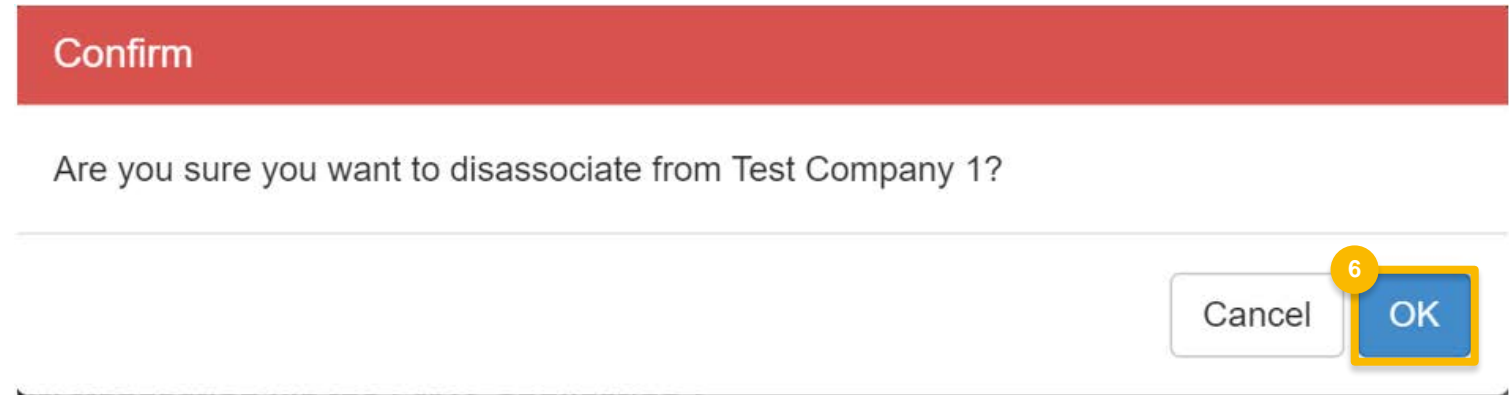
Disassociate

Back Save Save & Continue

## Submit Updated User Association Request as Delegated User (cont.)

6. If you selected the **Disassociate** button on the previous screen, confirm by selecting **OK** on this confirmation screen.
7. If you did not select the **Disassociate** button on the previous screen, skip to next slide.

Steps continue on next slide...



## Submit Updated User Association Request as Delegated User (cont.)

8. Select **Other (No Engineering Review)** in the required **Reason for Change** field
9. Add comment (required)
10. Click **Submit and Notify RCO**
11. The request will appear in the **My Pending Requests** section on your OTAQREG home page with the status "Awaiting RCO Signature"
12. Once the RCO or the Delegated RCO of the company activates the user association request, the requested role changes will be reflected under **My Roles** in the **My Companies** section of your OTAQREG home page.

8 Reason for Change: \* Other (No Engineering Review)

9 Comments: \* New role

10 Home Page Back Cancel Request Submit and Notify RCO

My Pending Requests

Show 10 entries Filter Requests:

Request ID	Request Type	Request Subject	Submitted By	Date Last Updated	Status
USR-14872	Update User	John Smith User ID	John Smith User ID	04/09/2019	Awaiting RCO Signature

Showing 1 to 1 of 1 entries Previous 1 Next

My Companies

Show 10 entries Filter Companies:

Company ID	Company Name	Address	My Roles
2220	Company ABC	1200 ABC St, Fairfax, VA 22030, US	<ul style="list-style-type: none"><li>EMTS RFS Viewer</li><li>Company Editor</li></ul>

Showing 1 to 1 of 1 entries Previous 1 Next

# Manage User Roles as RCO or Delegated RCO

Note: One of the new features of the enhanced version of OTAQREG is the ability for a company to identify a single individual as a Delegated RCO. The Delegated RCO can perform the same functions as the RCO within the EPA Fuels Program services.

1. Click the **Company ID**
  2. Select **Manage User Associations**
  3. Click **Edit Roles**
- ❖ RCO or Delegated RCO can manage roles for ALL delegated users. Please select the user whose roles you want to change.

Steps continue on next slide...

The screenshot shows the 'My Companies' interface. At the top, there is a 'Show 10 entries' dropdown and a 'Filter Companies:' search box. Below this is a table with columns: Company ID, Company Name, Address, and My Roles. The first row shows Company ID 2220, Company Name 'Company ABC', Address '1200 ABC St, Fairfax, VA 22030, US', and My Roles 'EMTS RFS Viewer', 'Company Editor', and 'RCO'. A dropdown menu is open for the Company ID '2220', with 'Manage User Associations' highlighted. Other options in the menu include 'View Company Information', 'Edit Roles', 'Edit Company Information', 'Edit Program Types and Activities', 'Manage Facilities', 'QAP Associations', 'Manage Reports', and 'RCO Update Request'. A 'Previous 1 Next' pagination control is at the bottom right.

The screenshot shows the 'Associated Users for Company ABC [2220]' interface. It features a table with columns: User ID, Name, and Associated Roles. The first row is for 'RCO CDX User ID' with 'RCO Name' and roles 'EMTS RFS Viewer', 'Company Editor', and 'RCO'. The second row is for 'Delegated User CDX User ID' with 'Delegated User Name' and roles 'EMTS RFS Viewer' and 'Company Editor'. Both rows have an 'Edit Roles' button. The 'Edit Roles' button for the Delegated User is highlighted with a yellow box and a '3' in a yellow circle.

## Manage User Roles as RCO or Delegated RCO (cont.)

4. Select or remove the appropriate roles
5. Click **Save and Continue**
6. Click **Accept**
7. Sign the request using the **eSignature Widget**

Steps continue on next slide...

Edit Roles for User John Smith

User Roles for Company Company ABC [1041]

Fuel Product And Additive Editor	<input checked="" type="checkbox"/> Yes
Cellulosic Biofuel Waiver Credits (Pay.gov) Submitter	<input type="checkbox"/> No
EMTS Fuels ABT Viewer	<input type="checkbox"/> No
EMTS Fuels ABT Submitter	<input type="checkbox"/> No
EMTS RFS Viewer	<input type="checkbox"/> No
EMTS RFS Submitter	<input type="checkbox"/> No
Part 80/1090 Report Submitter	<input checked="" type="checkbox"/> Yes
Company Viewer	<input type="checkbox"/> No
Company Editor	<input checked="" type="checkbox"/> Yes

Cancel Save & Continue

I certify, under penalty of law that the information provided in this document is, to the best of my knowledge and belief, true, accurate, and complete. I am aware that there are significant penalties for submitting false information, including the possibility of fines and imprisonment for knowing violations.

Accept Decline

eSignature Widget

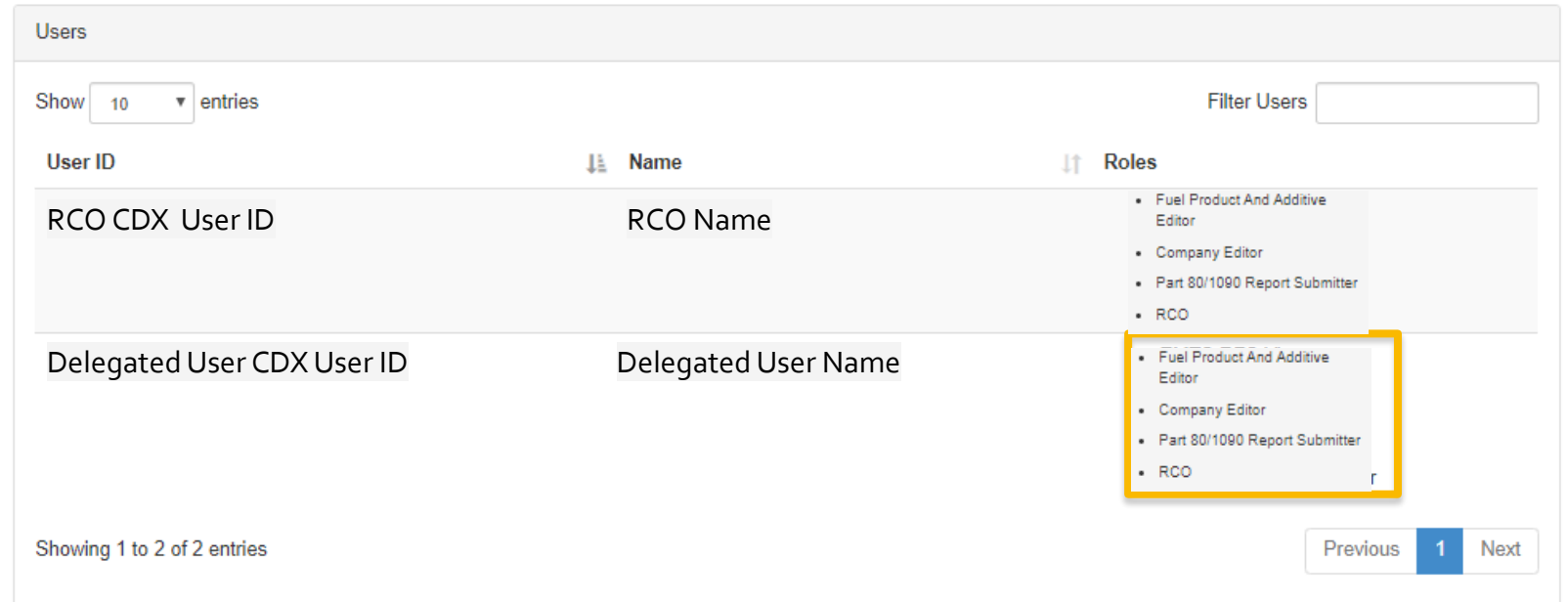
1. Authentication  
Log into CDX  
User:  
RCO CDX User ID  
Password:  
.....  
Show Password   
Welcome guchenwu jia

2. Verification  
Question:  
What was your first pet's name?  
Answer:  
.....  
Show Answer   
Correct Answer

3. Sign File  
Sign

## Manage User Roles as RCO or Delegated RCO (cont.)

- ❖ After signing the request, the requested role changes will be reflected under **Roles** in the **Users** section on the **Company Information** page.
- ❖ Any changes in roles related to EMTS will not be reflected until a sync occurs between the OTAQREG and OTAQEMTS program services overnight.



The screenshot displays the 'Users' management interface. At the top, there is a 'Show 10 entries' dropdown and a 'Filter Users' search box. Below this is a table with three columns: 'User ID', 'Name', and 'Roles'. The first row shows 'RCO CDX User ID' and 'RCO Name'. The second row shows 'Delegated User CDX User ID' and 'Delegated User Name'. The 'Roles' column for the second row is highlighted with a yellow box, showing a list of roles: 'Fuel Product And Additive Editor', 'Company Editor', 'Part 80/1090 Report Submitter', and 'RCO'. At the bottom, there is a 'Showing 1 to 2 of 2 entries' indicator and a pagination control with 'Previous', '1', and 'Next' buttons.

User ID	Name	Roles
RCO CDX User ID	RCO Name	<ul style="list-style-type: none"><li>Fuel Product And Additive Editor</li><li>Company Editor</li><li>Part 80/1090 Report Submitter</li><li>RCO</li></ul>
Delegated User CDX User ID	Delegated User Name	<ul style="list-style-type: none"><li>Fuel Product And Additive Editor</li><li>Company Editor</li><li>Part 80/1090 Report Submitter</li><li>RCO</li></ul>