



Quick Reference Guide

User Role Registration (Primary AO, Secondary AO, Primary Support, Secondary Support)

Pre-requisites

1. User can navigate to the Central Data Exchange (CDX) at <https://cdx.epa.gov/>
2. User can access the CSPP CDX Registration Guide from the **Frequently Asked Questions** page in CDX at <https://cdx.epa.gov/FAQ#CSPPQ2>.

Registration Process

1. Navigate to CDX at <https://cdx.epa.gov/>
2. Log in if you already have an account in CDX.
3. If you are registered with a program that is not CSPP:
 - a. Click the **[Add Program Service]** button and Continue to Step 7
4. Click the **[Register with CDX]** button.
5. Check the ‘I am this registrant. I will not share my account, and I accept the terms and conditions above’ checkbox on the **CDX Terms and Conditions** page and click the **[Proceed]** button.
6. Enter CSPP into the **Active Program Services** field and click the CSPP: Submissions for Chemical Safety and Pesticide Programs search result.
7. Select a user role **Primary Authorized Official** or **Secondary Authorized Official** from the **Select Role** drop-down menu.
8. Click the **[Request Role Access]** button.
9. Click the **[Add Facilities]** button.
10. Enter at least two search criteria and click the **[Search Facilities]** button.
11. Check the checkbox for the site(s) and click the **[Proceed with Selections]** button.
 - a. If your site(s) is/are not found, click the ‘Can’t find your facility? Click here to create it’ link to add a site(s).
12. Click the **[Save Selected Facilities]** button to save the selected site(s) displayed in the table.
13. Enter the Authorized Official’s User ID into the **Authorized Official’s User ID** field if registering as a Primary Support or Secondary Support.
14. Populate the following (at a minimum) required fields on the ‘User and Organization’ tab:
 - a. User ID
 - b. Title
 - c. First Name
 - d. Last Name
 - e. Password
 - f. Re-type Password
 - g. Security Question 1
 - h. Security Answer 1
 - i. Security Question 2
 - j. Security Answer 2
 - k. Security Question 3
 - l. Security Answer 3
15. Enter the **organization name** or **organization ID** into the ‘Organization Info’ field and press the **[Search]** button.
16. Click the **organization ID** link of the organization.
17. Populate the following details into the **Organization Info** fields:
 - a. Email



- b. Re-enter Email
- c. Phone Number

Click the [**Submit Request for Access**] button.

18. Use one of the following methods to complete registration:
 - a. Enter the code contained in the Core Registration Email Verification Request email into the **Code** field on the **Confirmation** page.
 - i. Click the [**Create Account**] button.
 - b. Access the link provided in the email.
19. Populate the following fields on the **Identity Verification** page:
 - a. Address Line 1
 - b. City
 - c. State
 - d. Zip Code
 - e. Date of Birth
 - f. Select a value from the **Month** drop-down menu
 - g. Select a value from the **Day** drop-down menu
 - h. Select a value from the **Year** drop-down menu
 - i. Enter the last 4 digits of the SSN into the Last 4 of SSN fieldClick the [Proceed with Verification] button or click the Paper Verification link.
20. If proceeding with paper verification, click the [**Sign Paper Form**] button.
 - a. Click the [**Print to Mail**] button.

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Agent/Consultant Role Registration Process

Prerequisites

1. Sponsoring user has a CDX account as a Primary Authorized Official or Secondary Authorized Official.
2. Agent/consultant user has received an email from a sponsoring user.
3. User can access the CSPP CDX Registration Guide from the **Frequently Asked Questions** page at <https://cdx.epa.gov/FAQ#CSPPQ2>.



Sponsoring Authorized Official Initiates Agent/Consultant Role Invitation

1. Navigate to CDX at <https://cdx.epa.gov/>
2. Log in as **Primary Authorized Official**
3. Click the **Role Sponsorship** tab.
4. Click the **Role Sponsorship/Invitation** link.
5. Enter the email address of the user to sponsor as an Agent/Consultant into the **Email** field of the Step 1: Recipient Information field.
6. Select **Submissions for Chemical Safety and Pesticide Programs** from the Program Service drop-down.
7. Select **Primary Agent/Consultant** or **Secondary Agent/Consultant** from the **Role*** drop-down menu.
8. Click the **[Submit]** button to navigate to the **Role Sponsorship Review** page.
9. Select the **Yes, the provided email address is correct** radio button and click the **[Submit]** button.
10. Re-enter the email address into the **Confirm Email *** field in the **Email Confirmation** window and click the **[Confirm]** button.



11. The potential Agent/Consultant will receive an email to the address provided.

Sponsoring Authorized Official approves the addition of the Agent/Consultant

1. The sponsoring Primary AO clicks the **Review this sponsorship request link** within the email to navigate to the **Role Sponsorship Login** screen.
2. Enter your password into the **Password** field as an Authorized Official on the **Role Sponsorship** screen and click the **[Log In]** button.
3. Select the appropriate user role from the **Role** drop-down menu to identify the sponsoring user role for the Agent/Consultant request.
4. Enter a facility ID or N/A into the **Facility ID *** field.
5. Click the **[Approve]** button to approve the sponsorship request and navigate to the **Account Registration** screen.
6. Select the **Select a Current Organization** radio button to identify a current sponsoring organization or
7. Select the **Request to Add an Organization** radio button to identify a new sponsoring organization.
8. Click the **[Submit Request for Access]** button to complete the request.

Agent/Consultant Registration Process – Agent/Consultant User

1. Click the **review this sponsorship link** within the Sponsorship Request email.
2. A potential Agent/Consultant sees the **Sponsorship Information** page with the option to log into an existing account or create a new account.

Creating a New Account as an Agent/Consultant

1. Click the **[Create New Account]** button.
2. Click the **[Approve]** button on the **Role Sponsorship Review** page to give permission for the sponsoring CDX official to view your contact information.

Adding a new organization using an Existing Account as an Agent/Consultant

1. Select the user ID from the **User ID** drop-down menu.
2. Enter the password and click the **[Log In]** button.
3. Select the **Select a Current Organization** radio button on the **Account Registration** page to register under an existing organization as an Agent/Consultant or
4. Select the **Request to Add an Organization** radio button on the **Account Registration** page to register under a new organization.



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Organization Information Change & Re-adding Sites

Organization Change

1. If an organization changes its name or other location-related details during the reporting period and is reporting using the new details, a user is required to register as a new organization.
2. Log into CDX.
 - a. Enter your user ID into the **User ID** field.
 - b. Enter your password into the **Password** field.
 - c. Click the **[Log In]** button.
3. Click the **[Add Program Service]** button.
 - a. Follow steps 5-7 in the **User Role Registration** section of this guide.
 - b. Click the **[Continue Without Facilities]** button.
4. Select the **[Request to Add an Organization]** radio button.
5. Enter the new organization name into the **Enter organization or organization ID** field and click the **[Search]** button.
6. If the organization does not yet exist, click the **request that we add your organization** link and populate the following fields:
 - a. Organization Name
 - b. Country
 - c. Mailing Address
 - d. City
 - e. State
 - f. Zip/Postal Code
 - g. Email
 - h. Re-enter Email
 - i. Phone Number
7. Click the **[Sign Electronically]** button on the **Electronic CDX Electronic Signature Agreement** page.
8. Click the **[Accept]** button on the certification pop-up message.
9. Populate the eSignature Widget fields:
 - a. Enter the password into the **Password** field and click the **[Login]** button.
 - b. Enter the answer to the 20-5-1 verification question into the **Answer** field and click the **[Answer]** button.
 - c. Click the **[Sign]** button.
10. The **Manage Program Services** page displays with the newly registered organization.
11. Re-add the same site(s) if necessary and send a request to ecdrweb@epa.gov so that any in-progress site(s) can be reset.
12. Re-add the site(s) to the newly identified/registered organization.
 - a. Follow steps 8-11 in the **User Role Registration** section of this guide.

Adding Site(s) to an Existing User ID

1. Log into CDX.
2. Click the **[Manage Your Program Services]** button.
3. Click **CSPP** for the desired organization.
4. Click the **Manage Facilities** link for the Primary Authorized Official user role.
5. Click the **Add Facilities** tab.



6. Enter at least two search criteria and click the **[Search Facilities]** button.
7. Check the checkbox for the site(s) and click the **[Proceed with Selections]** button.
 - a. If your site(s) is/are not found, click the 'Can't find your facility? Click here to create it' link to add a site(s).
8. Click the **[Save Selected Facilities]** button to save the selected site(s) displayed in the table.



Quick Reference Guide User Role Matrix

User Role Selection

- Reference the following when identifying the correct user role for which an individual should register.

<u>Legend</u> X=Can Perform Function	Primary AO	Primary Agent / Consultant	Primary Support	Secondary AO	Secondary Agent / Consultant	Secondary Support
	Contracting & Producing Company & Manufacturer			Joint Submitter (Secondary or Tertiary)		
	US & non-US	US & non-US	US & non-US	US & non-US	US & non-US	US & non-US
Primary Form						
Create Primary Form	X	X				
Creates Passphrase	X	X				
Generate Joint Submission Unique ID	X	X				
Generate Producing Company Unique ID	X	X	X			
Edit Primary Form	X	X	X			
Submit an original Primary Form	X					
Unlock Form Submission (Create an amendment)	X	X				
Submit an Amendment of a Form	X	X				
Assign Supports	X					
Joint Submitter (Secondary or Tertiary)						
Create Joint Form				X	X	
Create Passphrase				X	X	
Generate Tertiary Submission Unique ID				X	X	X
Edit Joint Form				X	X	X
Submit an original Joint Submission				X		
Unlock Joint Submission (Create an amendment)				X	X	
Submit an Amendment of a Joint Form				X	X	
Assign Supports				X		



2. **Primary Authorized Official:** A Primary Authorized Official has the ability to create, amend, unlock, and submit the primary Chemical Data Report (CDR) form electronically to EPA. The Primary Authorized Official also has the ability to assign Supports (including Agents/Consultants) to individual sites.
3. **Primary Agent/Consultant:** A Primary Agent/Consultant has the ability to create, amend, and/or unlock the primary Chemical Data Report (CDR) form electronically to EPA. The Primary Agent/Consultant has the ability to submit only amended forms to EPA.
4. **Primary Support:** A Primary Support has the ability to modify any unlocked primary form that he/she is assigned to by the Authorized Official.
5. **Secondary Authorized Official:** A Secondary Authorized Official has the ability to create, amend, unlock, and submit secondary Chemical Data Report (CDR) forms electronically to EPA. The Secondary Authorized Official also has the ability to assign Supports (including Agents/Consultants) to individual Sites.
6. **Secondary Agent/Consultant:** A Secondary Agent/Consultant has the ability to create, amend, and/or unlock the secondary or tertiary Chemical Data Report (CDR) form electronically to EPA. The Secondary Agent/Consultant has the ability to submit only amended forms to EPA.
7. **Secondary Support:** A Secondary Support has the ability to modify any unlocked secondary form that he/she is assigned to by the Authorized Official.