CEDRI Role Sponsorship

This job aide guides you through the CEDRI Role Sponsorship Process. If you are a CEDRI certifier, CDX allows you, as an authorized official of a reporting organization, to delegate the authority to modify, sign, and submit reports to EPA to another user on behalf of your organization.

You initiate the CDX registration process on behalf of another person (i.e. the Delegated Certifier) through the CDX role sponsorship function. The sponsored user is guided by CDX through the CDX registration process; including identity verification and signing of an Electronic Signature Agreement (ESA).

Note: The Delegated Certifier is authorized to perform the same tasks as the Certifier (i.e. Create and submit reports). However, a Delegated Certifier may not delegate their role to another representative.

Registration for this role cannot be requested by a user. It may only be initiated by a Certifier through the CDX role sponsorship function.

As a Certifier you initiate the Role Sponsorship process by select the ‘Role Sponsorship’ tab once you have logged into CDX (see Exhibit 1).
Once you click Role Sponsorship, you can see the “Role Sponsorship Tools’ (Exhibit 2). Select ‘Role Sponsorship/Invitation’ hyperlink to sponsor the Delegated Certifier role. Each of the three options are detailed in the next sections.

Exhibit 2

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1. Role Sponsorship/Invitation
2. Pending Sponsorship Requests
3. Access Management
Navigating CEDRI Role Sponsorship

Role Sponsorship/invitation

Initiate Sponsorship Request (Sponsoring Certifier)

To send a sponsorship request:

1. Click the ‘Role Sponsorship/Invitation’ link (see Exhibit 2). You are taken to the ‘Role Sponsorship/Invitation’ page (see Exhibit 3).
2. Enter the email address for the person you are sponsoring in the ‘Email’ field (see Exhibit 3).
3. Click the ‘Program Service’ drop down box and select ‘CEDRI: Compliance and Emissions Data Reporting’ from the drop down menu. (Please note that if you are registered for other program services which have role sponsorship privileges, they will be available in the dropdown.)
4. Click the ‘Role’ drop down box and select ‘Delegated Certifier’ from the drop down menu (see Exhibit 3). This is the CEDRI role being requested for the sponsored user.

5. Click the ‘Submit’ button to continue.
6. If you are a Certifier for more than one organization, you are prompted to select the role/organization you want to use to initiate the sponsorship request.
7. Review the information in the ‘Registration Information’ section for accuracy.
8. To continue select the ‘Yes, the provided email address is correct’ radio button to display the ‘Submit’ button (see Exhibit 4).
9. Click the ‘Submit’ button. To confirm the email address you entered (see Exhibit 4).
10. The system displays the email address of the user you wish to sponsor in the ‘Email’
11. Enter the email address in the ‘Confirm Email’ field (see Exhibit 5) and click ‘Confirm’ button.

Exhibit 4

Exhibit 5

12. Once you click ‘Confirm’ you are returned to the ‘Role Sponsorship Tools’ page while
Navigating CEDRI Role Sponsorship

your request is processed. Two emails are sent:

a) One to the Certifier sponsoring the request (you) confirming delivery of the request (see Exhibit 6).

b) One to the person being sponsored for the Delegated Certifier role asking them to review and respond to the request (see Exhibit 7).

Exhibit 6

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Your request was submitted.

Ms Sanilba G. Paleti with registered email address sanilba.paleti@epifederal.com has requested to sponsor you for the Delegated Certifier role.

Program Service: Compliance and Emissions Data Reporting Interface
Role: Delegated Certifier
Program ID: N/A

Please do not reply 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 888-496-1995 between 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.

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

United States Environmental Protection Agency - Central Data Exchange
Receive Sponsorship Request (Sponsored User)
If you are being sponsored by a CEDRI Certifier for the Delegated Certifier role, you are sent an email informing you of the sponsorship request (see Exhibit 7). The email provides you with the options to either review the request to continue the sponsorship process or cancel the sponsorship request.

Review and Accept Sponsorship Request
To review and accept the sponsorship request:

1. Click the ‘review this sponsorship’ link in the email to access the ‘Role Sponsorship’ page in CDX (see Exhibit 7).
2. Click the ‘Create New Account’ button if you do not have a CDX account or enter your user name and password if you already have a CDX account (see Exhibit 8).
   - If you have a CDX account:
     a) Enter your User ID and Password.
     b) Click the ‘Log In’ button. Review page.
3. Clicking either Log in (existing CDX account) or Create New Account opens the Role Sponsorship Review page where you may approve or reject the sponsorship invitation.

4. Verify the information in the ‘Sponsorship Information’ table see (see Exhibit 9).

5. Click the ‘Approve’ button to proceed to the ‘Account Registration’ page (see Exhibit 9).
6. On the Account Registration page confirm the role and click the ‘Request Role Access’ button see (Exhibit 10) to proceed to the Role Information ‘Add Facilities’ page.
7. Click ‘Add Facilities’ button to add facilities to your role see (Exhibit 11).

Exhibit 11

8. Provide facility information for your role. You have two options:
   - Enter search criteria for a facility and select the ‘Search Facilities’ button to select a facility. For more details about how to add a facility refer to (Manage My Facilities) job aide.
   - Continue with your role request without selecting a facility, and select a facility later after receiving access to the selected role. For more details on how to add a Facility after your receiving role access refer to (Manage My Facilities) job aide.

   Note: Preparers and Certifiers must share a facility to be able to work on the same

9. From the Add Facilities page you proceed to the ‘Account Registration’ page.
   - If you logged into an existing CDX account, the system auto-populates the ‘Part 1: User Information’ section with your CDX account information (see Exhibit 12).
   - If you chose to create a new CDX account, the ‘Part 1: User Information’ section allows you to establish your CDX user ID and password as well as enter the personal information required for your CDX account (see Exhibit 13).

   Note: Please record the answers to your security questions as these answers will be confirmed by the CDX Help Desk in the event you need your password reset. CDX accounts are locked after three unsuccessful log in attempts or if the password expires (passwords expire in 90 days if not changed).

10. Enter the required user information in the fields specified (see Exhibit 13).
Navigating CEDRI Role Sponsorship

Role Sponsorship Process
You are here: Role Sponsorship > Role Sponsorship Review > Account Registration

Registration Information

<table>
<thead>
<tr>
<th>Program Service</th>
<th>Compliance and Emissions Data Reporting Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Delegated Certifier</td>
</tr>
</tbody>
</table>

The following information was entered by a CDX user on your behalf. Please review and make any modifications before completing your profile information. Fields with asterisks (*) indicate required fields.

Part 1: User Information

The program you are registering for requires additional proof of identity. Later in the registration process you will be given the option to use LexisNexis, an identity proofing service. LexisNexis will pull your first, middle and last name exactly as it is entered on this page.

User ID * SPALETIHQ
Prefix               Ms
First Name * Sandhya HQ
Middle Initial       
Last Name * Paleti
Suffix               

Part 2: Organization Info

- Select a Current Organization
- Request to Add an Organization

Select a Current Organization
Select an organization from the dropdown list.

Submit Request for Access

Exhibit 12
Navigating CEDRI Role Sponsorship

You are here: Role Sponsorship » Role Sponsorship Review » Account Registration

Registration Information

Program Service: Compliance and Emissions Data Reporting Interface
Role: Delegated Certifier

The following information was entered by a CDX user on your behalf. Please review and make any modifications before completing your profile information. Fields with asterisks (*) indicate required fields.

Part 1: User Information

The program you are registering for requires additional proof of identity. Later in the registration process you will be given the option to use LexisNexis, an identity proofing service. LexisNexis will pull your first, middle and last name exactly as it is entered on this page.

User ID *
Title *
First Name *
Middle Initial
Last Name *
Suffix — Please Select —
Password *
Re-type Password *
Security Question 1 *
Security Answer 1 *
Security Question 2 *
Security Answer 2 *
Security Question 3 *
Security Answer 3 *

[ ] Show Passwords and Answers

Part 2: Organization Info

Enter organization or organization ID

Exhibit 13

March 20, 2020
Version 1.0
11. Enter organization information in part 2 (see Exhibit 13)
   - Existing CDX users may select a current organization or request to add an organization.
   - Users registering for a CDX account must first perform a simple search to determine if information for their organization exists in CDX. If the organization cannot be located, the organization may be added to CDX.

12. Click the ‘Submit Request for Access’ button to proceed (Exhibit 13). You are returned to the ‘MyCDX’ page which now displays the pending ‘Delegated Certifier’ role for the CEDRI program service (see Exhibit 14). The role remains in ‘Pending’ status until the request for access is approved by the role sponsor.

   - The system sends two emails:
      a) One to the Certifier who initiated the sponsorship request informing them that you have requested role access (Exhibit 15)
      b) One to you, the person being sponsored for the Delegated Certifier role, confirming that your request was submitted (Exhibit 16).

![Exhibit 14](image-url)
Complete the Sponsorship Request (Sponsoring Certifier)
When you receive the email for the person you are sponsoring for the Delegated Certifier role informing you they are requesting your sponsorship, you have the option to either continue processing or to cancel the request (see Exhibit 15). While doing this through the email link is one option, you can also continue or cancel the sponsorship request through Pending sponsorship/Request option in the Role Sponsorship tools. This is explained in Pending Sponsorship/Request section below.

Cancel Sponsorship Request (Sponsoring Certifier)
As a Certifier If you want to terminate the sponsorship request that you initiated for the Delegated Certifier you have the option to cancel the request.
Navigating CEDRI Role Sponsorship

To cancel the sponsorship request:

- Click the ‘cancel this sponsorship request’ link in the email (see Exhibit 15). The system navigates you to the ‘Role Sponsorship’ page which displays a notification that the sponsorship request has been canceled (see Exhibit 17).

Exhibit 17

Continue Processing Sponsorship Request

To review and accept the request for sponsorship:

1. As a sponsoring Certifier you receive an email to continue the sponsorship process. Click the ‘review this sponsorship’ link in the email (see Exhibit 15) or review Pending Sponsorship/Requests in the CDX Role Sponsorship tool to continue the process.

2. Once you click the link in the email, the system navigates you to the ‘Role Sponsorship’ page (see Exhibit 18)

3. Enter your User ID and Password to log into your CDX navigate to the ‘Sponsorship Information’ page (see Exhibit 18).
4. Click the ‘Select an Existing Role’ option see (Exhibit 19).

5. Click the ‘Organization’ drop down to display the list of organizations associated with your Certifier role.

6. Click the ‘Role’ drop down and select ‘Certifier-N/A’ from the drop down menu (The “N/A” refers to an additional identifier which is not used by the CEDRI application).

7. Click the ‘Approve’ button to continue to the ‘Role Sponsorship Signature’ page (see Exhibit 19).
8. Review the ‘Electronic Sponsor Agreement’ see (Exhibit 20).

9. As a certifier click the ‘Sign Electronically’ button to launch the CDX eSignature widget for you to securely sign the ESA (see Exhibit 20).

Note: The electronic sponsor agreement is an agreement between the signature holder and you, on behalf of the organization that authorizes the signature holder’s electronic signature. By signing the sponsor letter, you are authorizing the signature holder to sign and/or encrypt information for your organization.
10. Review the disclaimer and click the ‘Accept’ button to continue (see Exhibit 21).

11. Enter your CDX password, the answer to the security question displayed or enter the SMS PIN, and click the ‘Sign’ button (see Exhibit 22).

12. You are returned to the ‘Role Sponsorship Tools’ page and two emails are sent:

- One email to the sponsoring Certifier (you) confirming that the sponsorship request has been completed (see Exhibit 23).
- One email to the sponsored user confirming that the sponsorship request has been completed and a link to complete CDX registration (see Exhibit 24). The sponsored users Delegated Certifier role is now active.
Navigating CEDRI Role Sponsorship

Exhibit 21

Exhibit 22
Navigating CEDRI Role Sponsorship

Exhibit 23

The sponsor letter for the following sponsorship request has been completed.

Organization: CGI FEDERAL
Program Service: Compliance and Emissions Data Reporting Interface
Role: Delegated Certifier
Program ID: MULTI-FACILITIES

Please do not reply 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 between 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.

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

United States Environmental Protection Agency - Central Data Exchange

Exhibit 24

The sponsor letter for the following sponsorship request has been completed.

Organization: CGI FEDERAL
Program Service: Compliance and Emissions Data Reporting Interface
Role: Delegated Certifier
Program ID: MULTI-FACILITIES

You must log in to complete your account registration associated with this request after being redirected to the CDX application.

Please do not reply 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 between 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.

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

United States Environmental Protection Agency - Central Data Exchange
Pending Sponsorship Requests

Certifiers can go to Pending Sponsorship Requests to complete accepted role sponsorship requests. You can search the user information of someone that you have sponsored.

1. Click the hyperlink of ‘Pending Sponsorship Requests’ (Exhibit 25) under Role Sponsorship/Invitation.

2. Once you click the hyperlink, you are taken to the Pending Sponsorship Requests – Search page.

3. You need to enter the details in search criteria to search for the sponsor that you requested. Please note that any of the criteria below can be used and all are not required. Exact match is optional.
   - Email (Exact match)
   - User ID (Exact match)
   - First Name (Exact match)
   - Last name (Exact match)
   - Organization Name
   - Program Service
   - Role
   - Program ID (Exact match)

4. Once you fill the details of the user, click ‘Search’ button (Exhibit 26) to find the sponsor you sponsored.
5. Once you click the Search button, you are navigated to the Pending Sponsorship Request Search Results Screen (Exhibit 27).
6. You can see the information of the Requestor, Request Details, Request Date, and Actions in the table.
7. Click the ‘Approve’ button to approve the sponsor (Exhibit 27).
8. Once you click the approve button, you are navigated to the Role Sponsorship Signature screen (Exhibit 28).
9. Review the ‘Electronic Sponsor Agreement’.
10. Click the ‘Sign Electronically’ button (see Exhibit 28) to launch the CDX eSignature widget for you to securely sign the ESA.
11. Review the disclaimer and click the ‘Accept’ button to continue (see Exhibit 29).
12. Enter your CDX password, the answer to the security question displayed or enter the SMS PIN, and click the ‘Sign’ button (see Exhibit 30).
13. You are returned to the Role Sponsorship Request Search page (see Exhibit 31) and two emails are sent.

- One email is sent to the sponsored user confirming that the sponsorship request has been completed (see Exhibit 32) and a link to complete account registration.
- One email is sent to the sponsoring Delegated Certifier (see Exhibit 33) confirming that the sponsorship request has been completed.
Navigating CEDRI Role Sponsorship

Exhibit 31
Navigating CEDRI Role Sponsorship

To complete the sponsorship request:

1. Click the ‘log in to complete your account registration’ link in the email (see Exhibit 32). The system will navigate you to the ‘Role Sponsorship Process’ page (see Exhibit 34).
2. Enter your Password and click ‘Log In’ to continue the process.
3. When you click Login button, the screen navigates to the ‘Role Sponsorship Complete Account’ Screen (see Exhibit 35).
4. In the screen you can see the ‘Registration Information’ column and ‘Provide Contact information’ column.
5. Click ‘Submit’ button.
1. When you click Submit button, you are navigated to the ‘CDX Registration: LexisNexis’ screen (see Exhibit 36).

1. The LexisNexis Data Collection window displays the user and organization information collected by CDX and is not editable. The window also displays text fields in which you must provide the necessary Personal Identifiable Information (PII) for identity validation.

2. Enter required PII:
   - Last 4 digits of SSN
   - Home Address
   - Home City
   - Home State
   - Home Zip
   - Date of Birth

3. Select the ‘Proceed with Verification’ Button to proceed verification.
10. Once you click Proceed with Verification button, you are navigated to the ‘Paper CDX Electronic Signature Agreement’ (see Exhibit 37).
11. You successfully completed LexisNexis identity verification. You can electronically sign the ESA at this point.
12. Select the ‘Sign Paper Form’ button (see Exhibit 37). The system will display the ESA in a pop up window with an option to print the form (see Exhibit 38).
If you do not wish to leverage the LexisNexis process, you are required to follow the paper ESA process to activate your Delegated Certifier role. The paper process allows you to print the ESA, provide a wet ink signature and mail the signed ESA to the CDX Help Desk (refer to the ESA for mailing instructions).

To perform the ESA paper process:

1. Complete Paper ESA
   - If you do not wish to leverage the LexisNexis process, you are required to follow the paper ESA process to activate your Delegated Certifier role. The paper process allows you to print the ESA, provide a wet ink signature and mail the signed ESA to the CDX Help Desk (refer to the ESA for mailing instructions).
   
   To perform the ESA paper process:
1. Click ‘sign the paper form’ link on the Identify Verification page (see Exhibit 39), or on the identify verification results page, to navigate to the ‘Paper CDX Electronic Signature Agreement’ page (see Exhibit 36).

   ![Exhibit 39](image)

2. Select the ‘Sign Paper Form’ button (see Exhibit 39). The system will display the ESA in a pop up window with an option to print the form.
3. Select the ‘Print to Mail’ button and print the form.
4. Sign the ESA and mail it according to the ESA instructions.

The ESA application process typically takes 5 to 10 business days to complete. Your Delegated Certifier role remains as ‘Awaiting Activation’ until the CDX Help Desk receives your form, verifies your identity, and approves your role. You may not access the CEDRI program service until your account is activated. You will receive an email notification once your role is approved (see Exhibit 40). A copy of the ESA form is automatically saved in your CDX Inbox for future use.
The CROMERR 20-5-1 questions will be displayed the first time you log into your CDX account following role approval (see Exhibit 41). At that time you will be required to provide CROMERR 20-5-1 questions and answers.

Note: You must answer one of these questions (randomly selected) each time you submit a report to EPA through CEDRI. These questions are used as a second authentication factor. Your password is used as the first authentication factor.

Upon logging in to CDX or navigating to the ‘MyCDX’ screen, the ‘Delegated Certifier’ role you requested is listed under the ‘Services’ section of the page (see Exhibit 42).
Navigating CEDRI Role Sponsorship

Exhibit 42
Access Management

Access Management modifies existing role sponsorship privileges, it's how you revoke Delegated Certifier privileges for someone you have sponsored.

1. Click ‘Access Management’ hyperlink (see Exhibit 43).

2. Once you click the hyperlink, you are taken to the ‘Access Management – Search’ page (see Exhibit 44).

3. Enter the details in Search Criteria to search for the sponsor that you requested. Note that any criteria can be used and exact match is optional.
   - Email (Exact match)
   - User ID (Exact match)
   - First Name (Exact match)
   - Last name (Exact match)
   - Sponsorship Status
     - Active
     -Awaiting Account Completion
     -Awaiting Sponsorship Approval
     -Inactive
   -Organization Name
   -Program Service
   -Role
   -Program ID (Exact match)

4. Once you fill in the details of the user, click the ‘Search’ button (Exhibit 44) to find the user you sponsored.
5. Once you click the search button, it navigates you to the ‘Access Management Search Results’ see (Exhibit 45).

6. You can see the information in the table of Sponsored Users, Sponsorship Details, Status, Last Updated and Actions.

7. Click on the ‘Revoke’ hyperlink in the table mentioned under Actions (see Exhibit 45).
8. Once you click on the Revoke link, you receive a pop-up screen asking you for the reason for revoking (see Exhibit 46).

9. Enter the reason in the text box and click the ‘Submit’ button.
10. Once you click the Submit button, you are taken to the ‘Access Management Search Results’ screen indicating the role has been deactivated (see Exhibit 47).

Exhibit 47