Navigating the Create Report Workflow

This job-aide guides you through the report creation process. From the MyCEDRI dashboard click the ‘Create a Report’ button to start the report creation process.

To begin the Create Report workflow, select the type of report you are submitting by clicking the applicable report type in the ‘Select Report Type’ window (Exhibit 2).

CEDRI has two reporting workflows:

1. Electronic Report Tool (ERT) workflow used to submit ‘Performance Test / Evaluation Reports’
2. Non-ERT workflow used to submit ‘Notification Reports’, ‘Periodic Reports’, and ‘State/Local/Tribe Rule or Permit’ reports.
Navigating the Create Report Workflow

1. Notification Report
2. Periodic Report
3. Performance Test / Evaluation Report
4. State/Local/Tribe Rule or Permit

Exhibit 2
Navigating the Create Report Workflow

Non-ERT Reporting Workflow

Selecting ‘Notification Report’, ‘Periodic Report’, or ‘State/Local/Tribal Rule or Permit’ (Exhibit 2) takes you to the first step of the Create Report workflow (Exhibit 3) where you may select one or more reports to submit.

Note: There are three steps to selecting reports:
1. Enter search criteria to locate the report(s) to be submitted (Exhibit 3).
2. Search for Reports you wish to submit (Exhibit 4).
3. Add report(s) from the ‘Search Results’ to your ‘Selected Reports’ list (Exhibit 5).

Step 1: Select Your Report

Multiple search criteria are available to help you locate the Report Name (i.e. citation reference) you intend to submit. All search criteria are not required to be completed. Use whichever criteria best helps you identify the report you intend to submit.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sectors</td>
<td>Industry sector in which your facility operates</td>
</tr>
<tr>
<td>Source Categories</td>
<td>Industry group classification for facilities emitting toxic air pollutants</td>
</tr>
</tbody>
</table>

Exhibit 3

The following search criteria are available to help you locate the reports you intend to submit to EPA:
Navigating the Create Report Workflow

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Automatically populated based on Report Type selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts</td>
<td>40 CFR Regulation Parts</td>
</tr>
<tr>
<td>Subparts</td>
<td>40 CFR Regulation Subparts</td>
</tr>
<tr>
<td>Report Names</td>
<td>Citation reference from applicable 40 CFR Part/Subpart</td>
</tr>
</tbody>
</table>

After enter your search criteria click ‘Search for Reports’ (Exhibit 3) to display selected reports in the ‘Search Results’ table (Exhibit 4).

Exhibit 4

If your report is not listed in the search results, click ‘New Search’ to clear the search criteria so you may enter new search criteria. If the report(s) you intend to submit are found in the list click the ‘Add’ button next to the report to add the selected report to the ‘Selected Reports Table’ (Exhibit 5).

Continue searching as described above to add additional reports to the ‘Selected Report(s)’ table. Once all reports are in the ‘Selected Reports’ table you may proceed with the Create Report workflow.

Note: All reports in the ‘Selected Reports’ table are included in the Create Report workflow. Use the ‘Delete’ button to remove any reports you do not intend to submit to EPA (Exhibit 5).
Navigating the Create Report Workflow

To continue the Create Report workflow go to the top of the page and click the ‘Next: Upload Documents’ button to proceed to the next step (Exhibit 6).

The ‘Save and Return to My Reports’ button takes you back to the My Reports page. Selected report(s) are saved in the ‘My Reports’ dashboard. To find more information about this process, refer to the My Reports job aide.

You may also return to My Reports by clicking the ‘Return to My Reports’ button (Exhibit 6).
Navigating the Create Report Workflow

Exhibit 6

Step 2: Upload Documents
In Step 2 you may view the report information and download a report template by clicking ‘Click here to Download Report template’.

To upload your report, click the ‘Browse’ button to locate your file. Click ‘Upload’ to upload your file to CEDRI.

If you need to save the report before completing the workflow, click ‘Save and Return to My Reports’. Clicking ‘Return to My Reports’ returns you to the My Reports dashboard without saving.

Exhibit 7
Navigating the Create Report Workflow

You may download and view the uploaded report by clicking the report name hyperlink (Exhibit 8). If you would like to replace the uploaded report, click ‘Remove’ and then browse and upload a new report.

Once complete you may proceed to the next step in the workflow, which will be different depending on your role in CEDRI:

**Prepares**: click ‘Next: Notify Certifiers’ to select the facility submitting the report and send an email to selected Certifiers informing them a report is awaiting signature.

**Certifiers**: click ‘Next: Sign and Submit’ to select the facility submitting the report and proceed to the signature process.

(Note: The Preparer workflow is explained in this section. The Certifier workflow is explained in the ERT Report Workflow section below.)

**Step 3: Notify Certifiers**

To send an email notification to the Certifier(s) in your organization first select the facility for which the report is being submitted (Exhibit 9). Click ‘Select’ next to the Facility Address to specify the facility. Only one facility may be selected. To change your selection click ‘Select’ for a different facility.

Click ‘Send Notification to Certifiers’ to select the Certifiers to be informed that reports are awaiting their signature.
Clicking ‘Select’ opens a confirmation window where you may review the facility information before proceeding (Exhibit 10). Click ‘Continue’ to confirm your selection.
Navigating the Create Report Workflow

With the facility selection confirmed click ‘Send Notification to Certifiers’ to select the Certifiers to be informed that reports are awaiting their signature (Exhibit 9).

You may either ‘Select from Exiting Certifier(s)’ registered with the selected facility, or you may ‘Add New Certifier(s)’ not yet registered in CDX / CEDRI for the facility.

To add new Certifiers enter the persons email address and click ‘Add Certifier’. Once all existing Certifiers are selected, or new Certifiers added, click ‘Notify Certifiers’ to send the notification email.
Navigating the Create Report Workflow

ERT Report Workflow


Step 1: Upload Documents

Get the latest version of the Electronic Reporting Tool (ERT) by clicking ‘Create ERT ZIP File Using EPA’s Electronic Reporting Tool’ (Exhibit 12). CEDRI checks the ERT version during file upload to validate the most recent version is being used for reporting.

To upload your report, click the ‘Browse’ button to locate your file. Click ‘Upload’ to upload your file to CEDRI.

![Exhibit 2](image)

If you need to save the report before completing the workflow, click ‘Save and Return to My Reports’. Clicking ‘Return to My Reports’ returns you to the My Reports dashboard without saving.

You may download and view the uploaded report by clicking the report name hyperlink (Exhibit 13). If you would like to replace the uploaded report, click ‘Remove’ and then browse and upload a new report.
Click ‘Next: Select Your Reports’ to continue to the next step in the workflow.

**Step 2: Select Your Reports**

You may select one or more reporting requirements that are satisfied by your ERT submission. Use the ‘Search Criteria’ to locate the reports (Exhibit 14).

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**Note: There are three steps to selecting reports:**

4. Enter search criteria to locate the report(s) to be submitted (Exhibit 14).
5. Search for Reports you wish to submit (Exhibit 15).
6. Add report(s) from the ‘Search Results’ to your ‘Selected Reports’ list (Exhibit 16).

Multiple search criteria are available to help you locate the Report Name (ie citation reference) satisfied by your ERT. All search criteria are not required to be completed. Use whichever criteria best helps you identify the reporting requirements satisfied.
Navigating the Create Report Workflow

The following search criteria are available to help you locate the reports you intend to submit to EPA:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sectors</td>
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<td>Report Names</td>
<td>Citation reference from applicable 40 CFR Part/Subpart</td>
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</tbody>
</table>

After enter your search criteria click ‘Search for Reports’ (Exhibit 3) to display selected reports in the ‘Search Results’ table (Exhibit 15).
Navigating the Create Report Workflow

If your report is not listed in the search results, click ‘New Search’ to clear the search criteria so you may enter new search criteria. If the report(s) you intend to submit are found in the list click the ‘Add’ button next to the report to add the selected report to the ‘Selected Reports Table’ (Exhibit 16).

Continue searching as described above to add additional reports to the ‘Selected Report(s)’ table. Once all reports are in the ‘Selected Reports’ table you may proceed with the next step in the workflow.

If you inadvertently select are report not included in your ERT submission remove the report by clicking ‘Remove’ to delete the report reference from the list.
Navigating the Create Report Workflow

The ‘Save and Return to My Reports’ button takes you back to the My Reports page. Selected report(s) are saved in the ‘My Reports’ dashboard. To find more information about this process, refer to the My Reports job aide.

You may also return to My Reports by clicking the ‘Return to My Reports’ button (Exhibit 16).

Once complete you may proceed to the next step in the workflow, which will be different depending on your role in CEDRI:
Navigating the Create Report Workflow

**Prepares:** click ‘Next: Notify Certifiers’ to select the facility submitting the report and send an email to selected Certifiers informing them a report is awaiting signature.

**Certifiers:** click ‘Next: Sign and Submit’ to select the facility submitting the report and proceed to the signature process.

Note: The Certifier workflow is explained in this section. The Certifier workflow is explained in the [Non-ERT Report Workflow](#) section below.

**Step 3: Sign and Submit**

In step 3 of the workflow you are able to ‘Review Report Information’, download the ERT report to verify the information is correct, and confirm the facility submitting the report (Exhibit 17). Click ‘Select’ in the ‘Select Facility Submitting the Report’ section to review the facility address.

Click ‘Continue’ in the ‘Add Submitting Facility’ window to confirm your facility selection (Exhibit 18).

With your selection made click ‘Sign and Submit All Report(s) to initiate the eSignature process (Exhibit 17).
Navigating the Create Report Workflow

Exhibit 18

Read and confirm the eSignature disclaimer to continue the process. Click ‘I Confirm’ to continue (Exhibit 19).

Exhibit 19

The ‘eSignature Widget’ opens and prompts you to enter your CDX password and answer one of your CROMERR security questions (Exhibit 20). Once you have entered this information, select ‘Sign’ to sign and submit your reports.

Exhibit 20