Fuels Programs Registration User Guide Version 1.0

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Compliance and Innovative Strategies Division
Office of Transportation and Air Quality
U.S. Environmental Protection Agency

EPA United States
Environmental Protection
Agency

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1   Introduction

This document is the User Guide for the OTAQ Fuels Program Registration (OTAQReg) online application. It describes the processes a user must follow to register; update their user profile; associate to companies as well as create, view, and edit companies.

If you have any questions about the content, formats, or policies for the Office of Transportation and Air Quality (OTAQ) please reference the Fuels Program website at http://www.epa.gov/otaq/fuels/fuelssupport.htm..

If you have any general or technical questions related to the Central Data Exchange (CDX) you may contact any of the following:

- Telephone - Person-to-person telephone support is available from the CDX Help Desk 8:00 am to 6:00 pm EST. Call our toll-free line at 888-890-1995.
- Email - Send e-mail to Technical Support at helpdesk@epacdx.net with "Technical Support" in the Subject line.

2   Registration

The following sections describe how to register for the Fuels Registration (OTAQReg) application.

> **Note:** Existing OTAQReg users will be automatically migrated to the new application and will not be required to re-register.

2.1   CDX Registration

The OTAQReg application is hosted by the Central Data Exchange (CDX). CDX is the system that EPA has provided to all programs to standardize and centralize the reporting functions and data submissions that are required of the various EPA regulated communities. In order to access OTAQReg, users must first be registered users of CDX.

Registration for the OTAQReg application is open to all CDX users. If you are an existing CDX user please refer to Section 2.3.

2.2   OTAQReg Registration for New CDX Users

If you do not have an existing CDX user account please go to the following URL and complete your CDX Registration: http://epacdx.net/regwarning.asp?Referer=registration.

After entering your user specific information you will see to the "CDX Registration Add Program" page. Make sure to select "Office of Transportation and Air Quality Fuels Registration (OTAQREG)" as seen in Figure 2-1.

If you are an existing CDX user please refer to Section 2.3.

Figure 2-1 Add Program

Select the "Office of Transportation and Air Quality Fuels Registration (OTAQREG)" radio button and click the "Next" button. Figure 2-2 will display.

Figure 2-2 New User CDX Registration Add Program ID

The "New User CDX Registration Add Program ID" page acts as the OTAQReg registration page. You must provide data for all required fields (required fields are marked with a red star). "A SUBMITTER" is the only available Role and "Registration" is the only available Program ID type you can have for the OTAQReg application.

Click the "Finished" button. Figure 2-3 will display.

2.2.1 Print and Sign CDX Electronic Signature Agreement

In order to electronically sign submissions and letters within the OTAQReg application, it is required that you have a CDX Electronic Signature Agreement (ESA) on file.

Figure 2-3 CDX ESA Prompt

Click the "Sign Paper Form" button. Figure 2-4 will display.

Figure 2-4 Sign Paper ESA

The Sign Paper ESA prompt pre-populates your CDX User information onto the form and also displays the terms and agreement for electronically signing within CDX. To print and sign the complete form, click the "Sign Paper Form" button. A printable version of the complete CDX ESA will be displayed in a separate window and Figure 2-5 will display.

Print, sign and mail the CDX ESA to the Fuels Program Helpdesk at the following mailing address:

U.S. Environmental Protection Agency

Fuels Programs Registration (6406J)

1200 Pennsylvania Avenue, NW

Washington, DC 20460

You will not be able to electronically sign within the OTAQReg application until your CDX ESA is received by the Fuels Program. If you have any questions regarding the status of your ESA, please contact the EPA Fuels Program Support line at 202-343-9755 or by sending an email to EPAFuelsPrograms@epa.gov.

Figure 2-5 New User Registration Confirmation
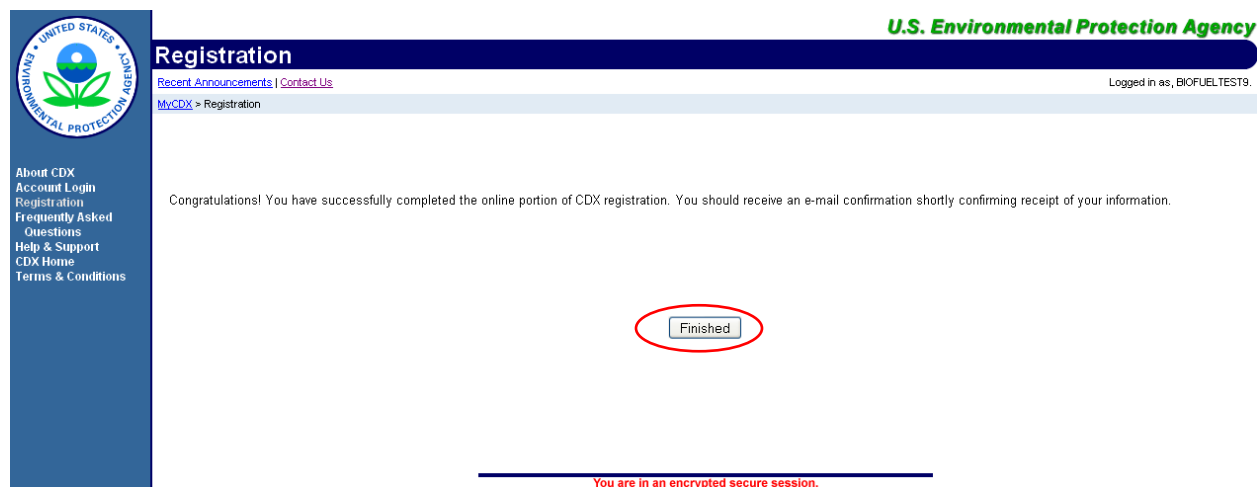
Congratulations on the completion of your online portion of CDX registration for the OTAQReg application. You will receive an e-mail notification confirming that you have registered for the OTAQ program at CDX.

Click the "Finished" button. Figure 2-6 will display.

2.2.2 eSignature PIN Verification

You will be prompted to complete your eSignature PIN Verification as seen in Figure 2-6.

Figure 2-6 eSignature PIN Verification Questions and Answers

You are required to select five of the displayed questions. The questions and answers you select here will be used later to verify your identity when electronically signing submissions in CDX.

Select your questions by clicking the check box next to each question. Enter your answers into the corresponding text boxes. Once you have provided answers for five questions click the "Save Answers" button. Figure 2-7 will display.

> **Reminder:** The questions that you select should be questions that you can easily remember however should be difficult for anyone else to guess.

![CDX Central Data Exchange logo]

Figure 2-7 eSignature PIN Confirmation
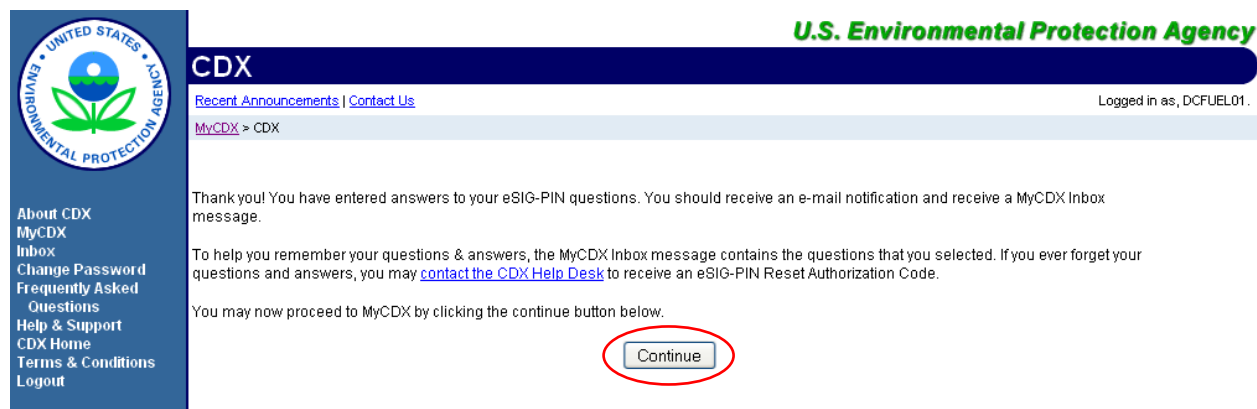
You have now successfully completed your eSignature PIN Verification. You will receive an email notification stating that you have provided answers to five eSIG-PIN questions. A MyCDX Inbox message will also be created containing the questions that you selected. However, for your protection, your answers will not be provided. If you ever forget your questions or answers, you may contact the CDX Help Desk to receive an eSIG-PIN Reset Authorization Code.

Click the "Continue" button. Figure 2-8 will display.

Figure 2-8 MyCDX Home Page
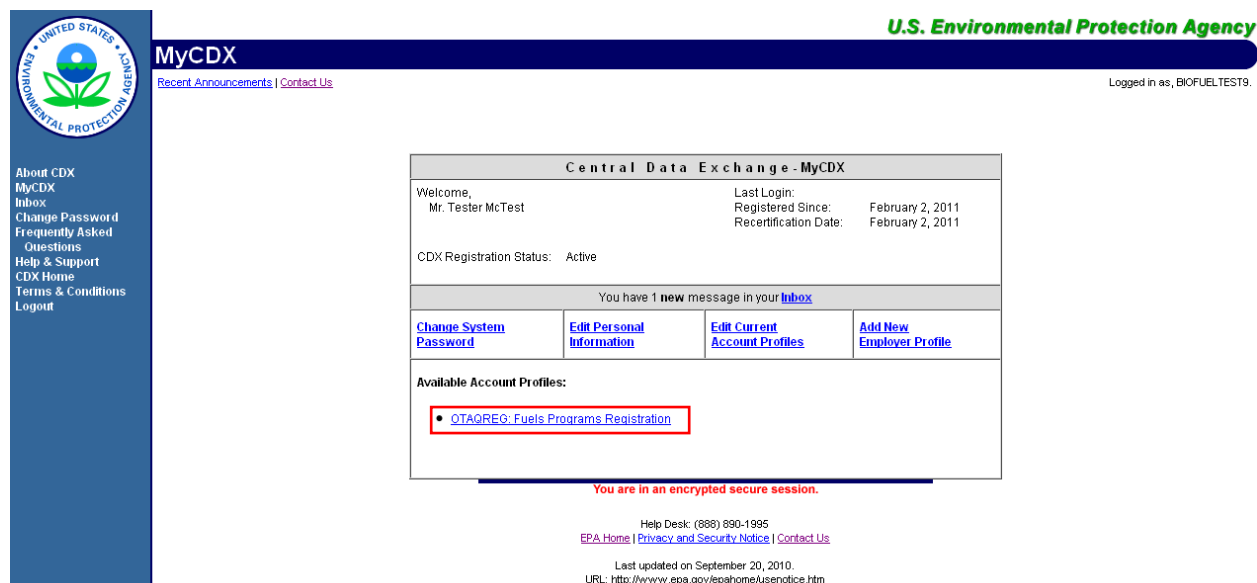
You will be given the "OTAQREG: Fuels Programs Registration" dataflow link.

Existing CDX users should refer to Section 2.3 for further details.

2.3 OTAQReg Registration for Existing CDX Users

This section is only for existing CDX users who do not have OTAQReg access. New CDX users should refer to Section 2.2 for further details.

Note: Existing OTAQReg users will be automatically migrated to the new application and will not be required to re-register.

After logging into CDX, Figure 2-9 will be displayed. To register for OTAQReg you must first add the dataflow to your account.

Figure 2-9 MYCDX Home Page

Click the "Edit Current Account Profiles" link. Figure 2-10 will display.

Figure 2-10 Edit Organization Profiles

Click the "Add New Program" link. This link will take you to the Add Program Page as seen in Figure 2-11.

Figure 2-11 Add Program

The "Add Program" page lists all of the available data flows available for registration. Select the "Office of Transportation and Air Quality Fuels Registration (OTAQREG)" radio button and then click the "Add" button. Figure 2-12 will display.

Figure 2-12 Existing User CDX Registration Add Program ID

The "Existing User CDX Registration Add Program ID" page acts as the OTAQReg registration page. You must provide data for all required fields (required fields are marked with a red star). "A SUBMITTER" is the only available Role and "Registration" is the only available Program ID type you can have for the OTAQReg application.

Click the "Finished" button.

2.3.1 Print & Sign CDX Electronic Signature Agreement

If your CDX user account currently does not have a CDX ESA on file then you will be prompted to Print and Sign the CDX ESA as seen in Figure 2-13.

Figure 2-13 CDX ESA Prompt

Click the "Sign Paper Form" button. Figure 2-14 will display.

Figure 2-14 Sign Paper ESA

The Sign Paper ESA prompt pre-populates your CDX User information onto the form and also displays the terms and agreement for electronically signing within CDX. To print and sign the complete form, click the "Sign Paper Form" button. A printable version of the complete CDX ESA will be displayed in a separate window and Figure 2-15 will display.

Print, sign and mail the CDX ESA to the Fuels Program Helpdesk at the following mailing address:

U.S. Environmental Protection Agency

Fuels Programs Registration (6406J)

1200 Pennsylvania Avenue, NW

Washington, DC 20460

You will not be able to electronically sign within the OTAQReg application until your CDX ESA is received by the Fuels Program. If you have any questions regarding the status of your ESA, please contact the EPA Fuels Program Support line at 202-343-9755 or by sending an email to EPAFuelsPrograms@epa.gov.

Figure 2-15 Added OTAQReg Role

OTAQReg will be listed under your Programs. Click the "MyCDX" link in the left side toolbar. Figure 2-16 will display.

2.3.2 eSignature PIN Verification

If your CDX user account currently does not have the eSignature PIN Verification then you will be prompted to complete your eSignature PIN Verification as seen in Figure 2-16.

Figure 2-16 eSignature PIN Verification Questions and Answers

You are required to select five of the displayed questions. The questions and answers you select here will be used later to verify your identity when electronically signing submissions in CDX.

Select your questions by clicking the check box next to each question. Enter your answers into the corresponding text boxes. Once you have provided answers for five questions click the "Save Answers" button. Figure 2-17 will display.

> **Reminder:** The questions that you select should be questions that you can easily remember however should be difficult for anyone else to guess.

Figure 2-17 eSignature PIN Confirmation
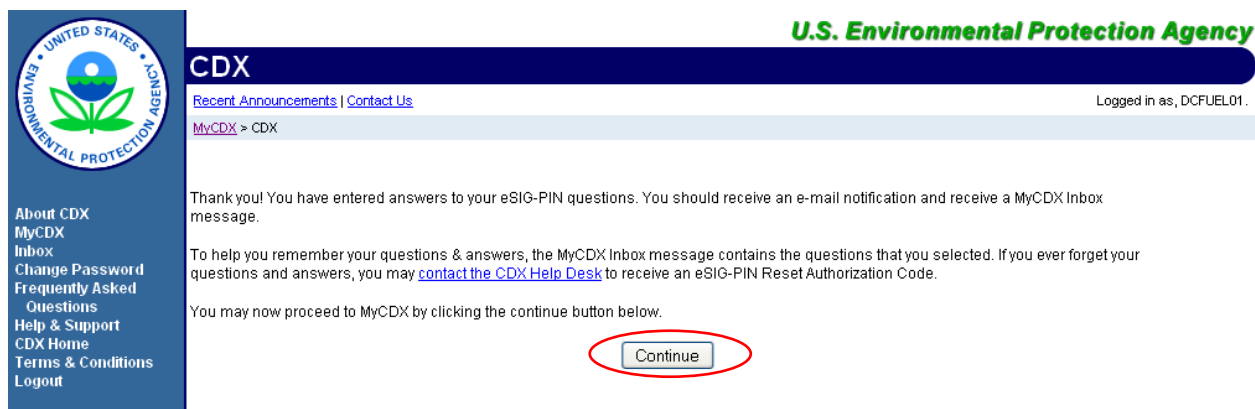
You have now successfully completed your eSignature PIN Verification. You will receive an email notification stating that you have provided answers to five eSIG-PIN questions. A MyCDX Inbox message will also be created containing the questions that you selected. However, for your protection, your answers will not be provided. If you ever forget your questions or answers, you may contact the CDX Help Desk to receive an eSIG-PIN Reset Authorization Code.

Click the "Continue" button. Figure 2-18 will display.

Figure 2-18 MyCDX Home Page

As seen in Figure 2-18, you will automatically be given the "OTAQREG: Fuels Programs Registration" dataflow.

3 Electronic Signature Agreement

As previously stated in Section 2, you must have a CDX ESA on file in order to electronically sign submissions and letters within the OTAQReg application. You will be prompted to sign and submit your CDX ESA upon accessing the OTAQReg application until your ESA has been received by the Fuels Program. The following section describes the ESA submission process.

If you are a CDX User that has previously submitted a CDX ESA then you are not required to re-send a CDX ESA thus please proceed to Section 4.

3.1 Enter OTAQReg

Figure 3-1 MyCDX Home Page

Click the "OTAQREG: Fuels Programs Registration" link on your MyCDX Home Page. If you are an existing Submitter within the OTAQDCFUEL: OTAQDCFUEL Application, follow the steps outlined in section 3.1.1.

All other OTAQReg users refer to section 3.1.2.

3.1.1 Signing Electronically

If you are an existing Submitter within the OTAQDCFUEL: OTAQDCFUEL Application, then you will be prompted with the option to either Electronically Sign the CDX ESA or Print and Mail the CDX ESA as seen in Figure 3-2.

Figure 3-2 Sign ESA Prompt

For convenience and timeliness, it is recommended that you electronically sign the CDX ESA. Click the "Sign Electronically" button. Figure 3-3 will display.

Figure 3-3 Sign Electronically

The CDX ESA Prompt pre-populates your CDX User information onto the form and also displays the terms and agreement for electronically signing within CDX. To view a complete example of the content for the CDX ESA, please refer to Figure 3-8.

Upon reading the full agreement, click the "Sign Electronically" button. Figure 3-4 will display.
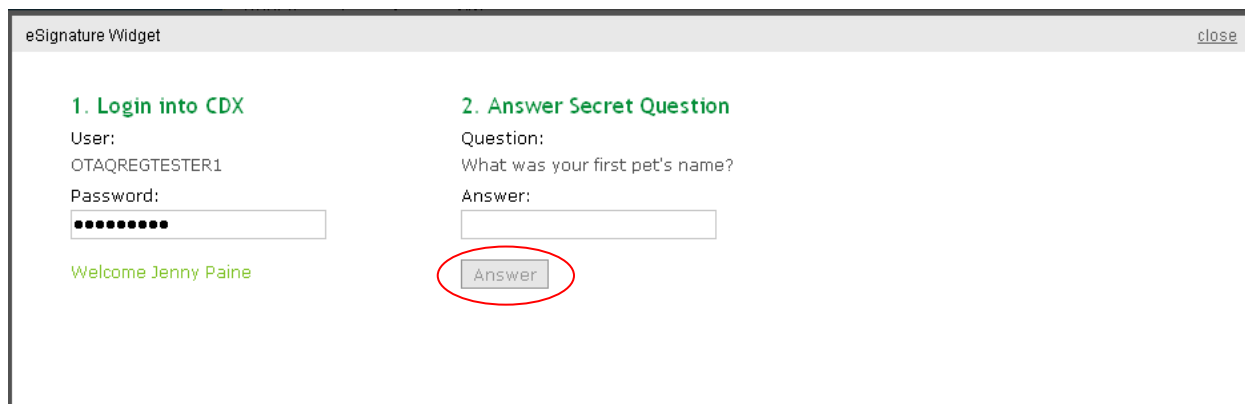
Figure 3-4 Authentication

This page requires you to verify your CDX identity. The page displays your CDX User ID and a field to provide your CDX password. If you enter an incorrect password, you will be prompted with an error message. After three failed attempts, your CDX account will be locked. To unlock your account, contact the CDX Help Desk at 888-890-1995 or heldesk@cdx.net.

Enter your CDX user account password and click the "Login" button. Figure 3-5 will display.

Figure 3-5 Answer Secret Question

The next step is to provide the answer to your secret question. The page will display one of the five secret questions you chose during your eSignature PIN verification.

If you fail to respond or enter an incorrect answer, you will be prompted with an error message. Please note that the secret question will not change should you answer incorrectly. After three failed attempts, your CDX account will be locked. To unlock your account, contact the CDX Help Desk at 888-890-1995 or heldesk@cdx.net.

Enter the answer you provided during your eSignature PIN verification and click the "Answer" button. Figure 3-6 will display.

Figure 3-6 Sign File

Click the "Sign" button.

Congratulations! You have successfully electronically signed your CDX ESA. You are now able to perform electronic signatures within the OTAQReg application.

3.1.2   Print, Sign and Mail

If you are not an existing Submitter within the OTAQDCFUEL: OTAQDCFUEL Application, then you will be prompted to print, sign and mail the paper CDX ESA.

Figure 3-7 Sign Paper ESA

The Sign Paper ESA prompt pre-populates your CDX User information onto the form and also displays the terms and agreement for electronically signing within CDX. To print and sign the complete form, click the "Sign Paper Form" button. Figure 3-8 will display.

Figure 3-8 Example CDX ESA

U.S. Environmental Protection Agency
ELECTRONIC SIGNATURE AGREEMENT

In accepting the electronic signature credential issued by the U.S. Environmental Protection Agency (EPA) to sign electronic documents submitted to EPA's Central Data Exchange (CDX), and as a representative for:

Electronic Signature Holder Company Information

Organization Name:	OTAQReg Test Organization
Address:	1234 Test Street
City, State, Zip:	Fairview, MD 22222
Province:	
Country:	US
Phone Number:	3333333333
E-mail Address:	jennifer.paine@cgifederal.com
Registrant's Name:	Mr. Ted Mosby
CDX User Name:	OTAQREGTESTER2

I, _____ ,
    (Name of Electronic Signature Holder)

(1) Agree to protect the electronic signature credential, consisting of my Central Data Exchange (CDX) user identification and password, from use by anyone except me. Specifically, I agree to maintain the secrecy of the password; I will not divulge or delegate my user name and password to any other individual; I will not store my password in an unprotected location; and I will not allow my password to be written into computer scripts to achieve automated login;

(2) Agree to contact the U.S. EPA CDX Help Desk at 1-888-890-1995 as soon as possible, but no later than 24 hours, after suspecting or determining that my user name and password have become lost, stolen or otherwise compromised;

(3) I agree to notify CDX within ten working days if my duties change and I no longer need to interact with the CDX on behalf of my organization. I agree to make this notification by notifying the CDX Technical Support staff at 1-888-890-1995 or helpdesk@epa.gov;

(4) Understand that I will be informed through my registered electronic mail (e-mail) address whenever my user identification or password have been modified;

(5) Understand that CDX reports the last date my user identification and password were used immediately after successfully logging into CDX;

(6) Understand and agree that I will be held as legally bound, obligated, and responsible for the use of my electronic signature as I would be using my hand-written signature;

(7) Understand that whenever I electronically sign and submit an electronic document to the CDX, I will receive an e mail at my registered e mail address; This e-mail will inform me that a submission has been made to CDX from my user account and will contain instructions to view information regarding the submission, including my Copy of Record (CoR);

(8) Agree that if I receive an e mail notification for any activity that I do not believe that I performed, I will notify the CDX Help Desk as soon as possible, but no later than 24 hours, after receipt;

(9) Agree to contact the CDX Help Desk if I do not receive an e mail notification within 5 business days for any electronically signed submission using my credentials;

(10) Agree to report, within 24 hours of discovery, any evidence of discrepancy between any electronic document I have signed and submitted and what the CDX has received from me by contacting the CDX or service Help Desk;

(11) Agree to notify the EPA if I cease to represent the regulated entity specified above as signatory of that organization's electronic submissions by contacting the CDX Help Desk as soon as this change in relationship occurs and to sign a surrender certification at that time; and,

(12) Agree to retain a copy of this signed agreement as long as I continue to represent the regulated entity specified above as signatory of the company's electronic submissions.

Name of electronic signature holder: Mr. Ted Mosby

Signature: _____

Date: _____

PLEASE MAIL THIS DOCUMENT AS SOON AS POSSIBLE TO:

U.S. Environmental Protection Agency
Environmental Protection Agency
Fuels Programs Registration (6406J)
1200 Pennsylvania Avenue, NW
Washington, DC 20460

Please click PRINT & CLOSE to get a hard copy of this agreement.

PRINT & CLOSE

Click the "Print & Close" button and mail the printed CDX ESA to the Fuels Program Helpdesk at the following mailing address:

U.S. Environmental Protection Agency

Fuels Programs Registration (6406J)

1200 Pennsylvania Avenue, NW

Washington, DC 20460

You will not be able to electronically sign within the OTAQReg application until your CDX ESA is received by the Fuels Program. If you have any questions regarding the status of your ESA, please contact the EPA Fuels Program Support line at 202-343-9755 or by sending an email to EPAFuelsPrograms@epa.gov.

4 User Profiles

The following sections describe how to navigate within the OTAQReg application to create and edit a User Profile.

If you are an existing OTAQReg user please proceed to section 4.2.

4.1 Create a New User Profile (New OTAQReg Users)

Figure 4-1 MyCDX Home Page

Click the "OTAQREG: Fuels Programs Registration" link on your MyCDX Home Page. Upon your initial login to OTAQReg, Figure 4-2 will display.

Figure 4-2 Edit User Profile Page

The page will pre-populate the contact information associated to your CDX account. To edit the pre-populated information, click the "Edit Current Account Profiles" link to be taken to the CDX Edit Organization Profiles page.

If no changes to the pre-populated information are needed, enter data into any of the applicable textboxes. You must provide data for the "Position or Job Title" field. Click the "Save" button. Your user profile will be saved and Figure 4-3 will display.

Figure 4-3 OTAQ Registration Home Page

4.2   Edit Existing User Profile

The following section describes how to edit your OTAQReg User Profile information.

Figure 4-4 OTAQ Registration Home Page

Click the "Edit User Profile" link in the left side toolbar of your OTAQ Registration Home Page as shown in Figure 4-4. Figure 4-5 will display.

Figure 4-5 Edit User Page

The page will pre-populate with your current OTAQReg User Profile information. To update the un-editable CDX user information, click the "Edit Current Account Profiles" link to be taken to the CDX Edit Organization Profiles page.

Edit any of the additional user profile data by updating the data in the textboxes and clicking the "Save" button.

5   Company Associations

The following sections describe how to add and update company associations within the OTAQReg application.

5.1   Add Company Association

Figure 5-1 OTAQ Registration Home Page

Click the "Associate to Company" link in the left side toolbar of your OTAQ Registration Home Page. Figure 5-2 will display.

Figure 5-2 Associate to Company Search Page

Enter your company specific search criteria into the textboxes and click the "Search" button. A list of all companies matching your search criteria will display as shown in Figure 5-3.

> **Note:** .Search for the company in the Associate to Company Screen that you navigated to. Be broad in your search and understand that the more fields you use in your search, the fewer results you will receive. Duplicated companies will not be processed and the user will need to restart the process

Figure 5-3 Associate to Company Search Results

Select the checkbox next to the company with which you wish to associate (if you do not see your company listed in the results, click the "Create New Company" button to create your company; see Section 6 for further details). Click the "Add Selected" button. Figure 5-4 will display.

Note: You may select multiple check boxes if you wish to associate to more than one company.

Figure 5-4 Associate to Company Page

You must select at least one role per company prior to submitting your user association request. Click the "Select Roles" link to display a pop-up of available roles for the company. Figure 5-5 will display.

Figure 5-5 Company Roles Pop-Up

Choose the appropriate OTAQ Registration and OTAQ Program Roles by selecting the corresponding radio button and checkboxes (reference Appendix A: OTAQ Registration Roles if you are unsure which roles to select). You may select only one OTAQ Registration role, however multiple OTAQ Program roles are allowed. Click the "Select All" link to select all OTAQ Program Roles.

Click the "Select" button once you have made your selections. Figure 5-6 will display.

Figure 5-6 Associate to Company Page with Roles

Your selected roles will now display beside the selected company. Click the "Review" button to continue. Figure 5-7 will display.

Figure 5-7 Associate to Company Review Page

The Associate to Company Review page displays a read-only version of your company association details. If the company and role information are correct, click the "Submit" button. Figure 5-8 will display.

Note: Upon landing on the Signature Page you will be prompted with a Java Security Warning. Please refer to Appendix C: System Java Requirements for further details.

Figure 5-8 Associate to Company Signature Page

Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms before submitting your request.

If you wish to electronically sign your User Responsibility Letter for the Company Association request, click the "Sign Electronically" button. Figure 10-1 will display. Please reference Appendix B: Using the eSignature Widget for instructions on signing electronically.

> **Note:** The "Sign Electronically" button will only be displayed if the Fuels Program has received your CDX Electronic Signature Agreement. Please refer to Section 3 for further details.

If you wish to submit hard copies of your registration forms to the Fuels Program, click the "Print and Sign" button.

Once you have submitted your Company Association Request, you will receive an email notification stating that your Company Association Request is awaiting RCO signature along with a hard copy of your company association registration forms. Additionally, a MyCDX Inbox message will also be created confirming your submission. The Company Association request will appear in the Pending Requests section of your OTAQ Registration Home Page as shown in Figure 5-20.

> **Note:** All Company Association requests require a signed RCO Delegation Letter by your Company Responsible Corporate Officer. The RCO Delegation Letter is included in the hard copy of your company association registration forms.

5.2　Update Company Roles

Figure 5-9 OTAQ Registration Home Page

Click the "Update Existing Company Association" link in the left side toolbar of your OTAQ Registration Home Page. Figure 5-10 will display.

Figure 5-10 Update Company Associations Page

Select the Roles link for the company you wish to update. Figure 5-11 will display.

Figure 5-11 Update Roles

Your existing roles will be pre-selected on the page. Update your OTAQ Registration and OTAQ Program Roles by selecting a new radio button and/or checkboxes (reference Appendix A: OTAQ Registration Roles if you are unsure which roles to select). You may select only one OTAQ Registration role however multiple OTAQ Program Roles are allowed.

Click the "Select" button once you have made your selections. Figure 5-12 will display.

Figure 5-12 Updated Company Associations

The Update Company Associations Page will now display your updated roles. Click the "Review" button. Figure 5-13 will display.

Figure 5-13 Confirm Updated Company Association

The page will display the updated icon [image] for the updated company association. If the updated company association is correct, click the "Submit" button. Figure 5-14 will display.

> **Note:** Upon landing on the Signature Page you will be prompted with a Security Warning. Please refer to Appendix C: System Java Requirements for further details.

Figure 5-14 Update Company Association Signature Page

Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms before submitting your request.

If you wish to electronically sign your User Responsibility Letter for the Company Association update request, click the "Sign Electronically" button. Figure 10-1 will display. Please reference Appendix B: Using the eSignature Widget for instructions on signing electronically.

If you wish to submit hard copies of your registration forms to the Fuels Program, click the "Print and Sign" button.

> **Note:** All Company Association Update Requests require a signed RCO Delegation Letter by your Company Responsible Corporate Officer. The RCO Delegation Letter is included in the hard copy of your company association registration forms.

Once you have submitted your Updated Company Association, you will receive an email notification stating your request is awaiting RCO signature along with a hard copy of your company association registration forms and. The updated company association request will appear in the pending requests section of your OTAQ Registration Home Page. Please reference section 5.4 for information on viewing pending association requests.

5.3 Remove Existing Company Association

To remove an existing company association, navigate to the Update Company Associations page (see Figure 5-10).

Figure 5-15 Remove Company Association
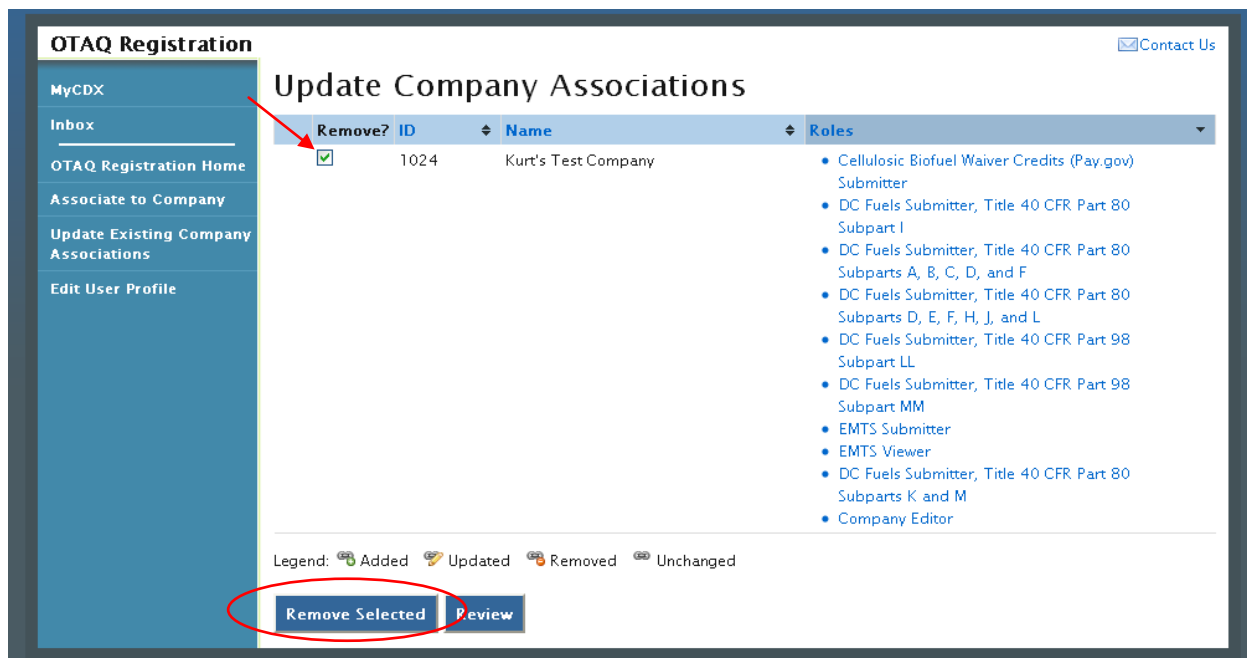
Select the checkbox next to the company association you wish to remove and click the "Remove Selected" button. Figure 5-16 will display.

Figure 5-16 Remove Company Pop-Up
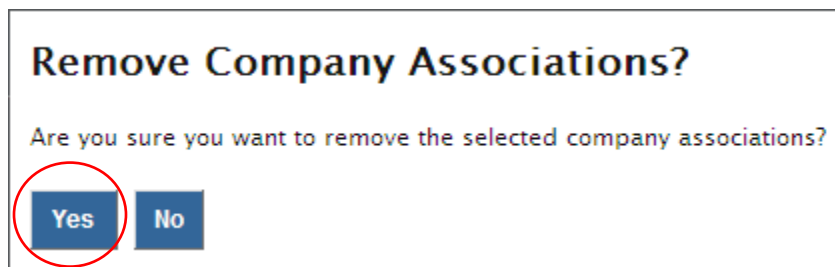
Click the "Yes" button to confirm that you would like to remove the selected company association. Figure 5-17 will display.

Figure 5-17 Removed Company Association

The removed icon ![icon] will now display next to the company association you have removed. Click the "Review" button. Figure 5-18 will display.

Figure 5-18 Remove Company Association Confirmation

If the removed company association is correct, click the "Submit" button. Figure 5-19 will display.

Note: Upon landing on the Signature Page you will be prompted with a Security Warning. Please refer to Appendix C: System Java Requirements for further details.

Figure 5-19 Remove Company Association Signature Page

Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you print and save a copy of your registration forms before submitting your request.

If you wish to electronically sign your User Association Termination Letter for the Company Association update request, click the "Sign Electronically" button. Figure 10-1 will display. Please reference Appendix B: Using the eSignature Widget for instructions on signing electronically.

If you wish to submit hard copies of your registration forms to the Fuels Program, click the "Print and Sign" button.

> **Note:** All Company Association Removal Requests require a signed User Association Termination Letter by your Company Responsible Corporate Officer. The User Association Termination Letter is included in the hard copy of your company association registration forms.

Once you have submitted your Remove Company Association request, you will receive an email notification stating your request is awaiting RCO signature along with a hard copy of your company association registration forms. The updated company association request will appear in the pending requests section of your OTAQ Registration Home Page. Please refer to section 5.4 for information on viewing pending association requests.

5.4   Pending Company Association Requests

Congratulations! You have successfully submitted your Company Association Request in the OTAQReg application. As shown in Figure 5-20, your request will be displayed in your Pending Requests queue on your OTAQ Registration Home Page along with its current status.

Figure 5-20 Pending Company Association Requests

To view a pending Company Association Request, click the Company Name link for a request in the Pending Requests Queue with the Company Association icon . Figure 5-21 will display.

Figure 5-21 Company Association Request

The Company Association Request page displays all request information. To return to the OTAQReg Home Page click the "Return" button.

To cancel the Company Association Request, click the "Cancel Request" button. The request will be canceled immediately and will no longer display in the Pending Requests queue.

6   Create New Company

The following sections describe how to create a new company in the OTAQReg application.

Figure 6-1 OTAQ Registration Home Page

Click the "Associate to Company" link in the left side toolbar of your OTAQ Registration Home Page. Figure 6-2 will display.

6.1 Verify Company Does Not Exist in OTAQReg

Figure 6-2 Associate to Company Search Page

Before you can create a new company, you must first confirm that the company you intend to create does not already exist in OTAQReg. Enter search criteria pertinent to your company and click the "Search" button. Figure 6-3 will display.

> **Note:** .Search for the company in the Associate to Company Screen that you navigated to. Be broad in your search and understand that the more fields you use in your search, the fewer results you will receive. Duplicated companies will not be processed and the user will need to restart the process

Figure 6-3 Associate to Company Search Results

The page will return a list of companies matching the provided search criteria. If your company is displayed in the search results then please refer to Section 5.1 for instructions on how to associate to an existing company.

If it is determined that your company does not currently exist in OTAQReg, click the "Create New Company" button. Figure 6-4 will display.

6.2   Create Company Details

Figure 6-4 Create New Company: Company Details Page

The Create New Company: Company Details page displays fields for you to provide the Company Name, Location, Responsible Corporate Officer information, Program Types, Business Activities, Company Contacts, and other required company details.

Enter information for all required fields. Required fields are marked with a red star.

The Business Activities associated to each Program Type are displayed once a Program Type is selected as seen in Figure 6-5.

Figure 6-5 Program Types and Business Activities

To add a company contact, click the "Add New Contact" button. Figure 6-6 will display.

Figure 6-6 Company Contacts

Enter information in all required fields by typing in the textboxes. Click the "Save Contact" button. The contact will now be listed in the company details.

After you have provided your complete company details, click the "Next" button. Figure 6-7 will display.

6.2.1 Select Company Roles

Figure 6-7 Create New Company: Company Roles

As the creator of a company, the Company Editor role is pre-selected for you. Click the "Company Editor" link to add additional roles. Figure 6-8 will display.

Figure 6-8 Company Roles Pop-Up

Choose the appropriate OTAQ Registration and OTAQ Program roles by selecting the corresponding radio button and checkboxes (reference Appendix A: OTAQ Registration Roles if you are unsure which roles to select). You may select only one OTAQ Registration role however multiple OTAQ Program roles are allowed. Click the "Select All" link to select all OTAQ Program Roles. Figure 6-9 will display.

Figure 6-9 Selected Company Roles

Click the "Next" button. Figure 6-10 will display.

6.3 Adding Company Facilities

Your company may or may not require that you add a Facility depending on the Program Types and Business Activities selected for your company.

Figure 6-10 Create New Company: Facility List

Click the "Review" button. Figure 6-11 will display if your company is required to have at least one facility. If your company is not required to have at least one facility then you will be directed to the Create New Company Signature page as seen in Figure 6-24 (continue to Section 6.5).

Figure 6-11 Create New Company: Facility List Requires Facility

To add a facility to your company click the "Add Facility" button. Figure 6-12 will display.

Figure 6-12 Create New Company: Facility Type

The Facility Types are pre-populated on the page based on the Program Type(s) and Business Activity(s) you selected for your company. Select the radio button next to the appropriate facility type you wish to add and click the "Next" button. Figure 6-13 will display.

> **Note:** You may cancel adding a facility at any time by selecting the "Cancel Facility" button.

Figure 6-13 Create New Company: Facility Activities

The Facility Activities are pre-populated onto the page based on the Program Type(s), Business Activity(s), and Facility Type you selected. Click the checkbox next to all applicable facility activities and click the "Next" button. Figure 6-14 will display.

6.4   Verify Facility Does Not Exist in OTAQReg

Figure 6-14 Create New Company: Search for Existing Facility

Before you can create a new facility, you must first confirm the facility you intend to create does not already exist in the OTAQReg application. To confirm whether or not your facility already exists in OTAQReg, search for your facility by providing search criteria into the facility search fields. Click the "Search" button. Figure 6-15 will display.

Figure 6-15 Facility Search Results

The page will return a list of facilities matching the provided search criteria. If your facility is displayed in the search results then please refer to Section 6.4.2 for instructions on how to add an existing facility.

> **Note:** .Search for the facility in the Create New Company: Search for Existing Facility Screen that you navigated to. Be broad in your search and understand that the more fields you use in your search, the fewer results you will receive. Duplicated facilities will not be processed and the user will need to restart the process

If it is determined that your facility does not currently exist in OTAQReg, click the "Create New Facility" button. Figure 6-16 will display.

6.4.1   Create New Facility

Figure 6-16 Create New Company: Basic Facility Details

Enter information for all required fields. Required fields are identified with a red star. Click the "Next" button when finished. Figure 6-17 will display.

Note: Address 1 may not be a P.O. Box address. If you are entering an international address that has no postal code, enter "00000."

Figure 6-17 Create New Company: Facility Details

Enter information in all required fields by typing in the textboxes and selecting from available drop-down menus. The sections and required fields displayed on the Facility Details page will vary depending on the Facility Types and Facility Activities you previously selected for the facility.

Click the "Save Facility" button when finished. Figure 6-18 will display.

Figure 6-18 Create New Company: Facility List

If the displayed facility information is correct, click the "Review" button. Figure 6-23 will display (continue to Section 6.5).

6.4.2   Add Existing Facility

Figure 6-19 Select Existing Facility

If it is determined that your Facility exists in OTAQReg, choose the desired facility by selecting the corresponding radio button and clicking the "Use Selected Facility" button. Figure 6-20 will display.

Figure 6-20 Existing Facility Details

The existing Facility Name and Location will be pre-populated on the page. The Facility Name field is editable however you are not able to edit the facility location for an existing facility. Provide information for all required fields and click the "Next" button. Figure 6-21 will display.

Figure 6-21 Create Facility Details

Enter information in all required fields by typing in the textboxes and selecting from available drop-down menus. The sections and required fields displayed on the Facility Details page will vary depending on the Facility Types and Facility Activities you previously selected for the facility.

Click the "Save Facility" button when finished. Figure 6-22 will display.

Figure 6-22 Review Facility List

If the displayed facility information is correct, click the "Review" button. Figure 6-23 will display.

6.5   Review and Submit New Company Information

Figure 6-23 Create New Company: Review

The Create New Company: Review page displays a read-only version of the company and facility details provided. If the new company information on the page is correct click the "Submit" button. Figure 6-24 will display.

> **Note:** Upon landing on the Signature Page you will be prompted with a Security Warning. Please refer to Appendix C: System Java Requirements for further details.

Figure 6-24 Create New Company: Print and Sign

Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms before submitting your request.

If you wish to electronically sign your New Company request, click the "Sign Electronically" button to finalize your submission. Follow the steps outlined in Section 3 to complete the eSignature Verification process.

If you wish to submit hard copies of your registration forms to the Fuels Program, click the "Print and Sign" button.

> **Note:** The "Sign Electronically" button will only be displayed if the Fuels Program has received your CDX Electronic Signature Agreement. Refer to Section 3 for further details.

Once you have submitted your New Company Request, you will receive an email notification stating your new company is awaiting EPA review. The company request will appear in the pending requests section of your OTAQ Registration Home Page as shown in Figure 6-25.

6.6 Pending New Company Requests

Congratulations! You have successfully submitted your New Company Request in the OTAQReg application. As shown in Figure 6-25, your request will be displayed in your Pending Requests queue on your OTAQ Registration Home Page along with its current status.

Figure 6-25 OTAQ Registration Home page: Pending Requests

To view a pending New Company Request, click the Company Name link in the Pending Requests Queue for a request identified with the company association icon [icon]. Figure 6-26 will display.

Figure 6-26 New Company Request

The New Company Request page displays all of the company's information. To return to the OTAQReg Home Page click the "Return" button.

To cancel the New Company Request, click the "Cancel Request" button. The request will be canceled immediately and will no longer display in the Pending Requests queue.

7 View Company Details

The following section describes how to view company details in the OTAQReg application.

Figure 7-1 OTAQ Registration Home Page

To view a company's details, navigate to your OTAQ Registration Home Page and click the Company Name link for a company with which you have an active role. The company details will display as shown in Figure 7-2.

Figure 7-2 Company Information: Company Details

The level of company information displayed depends on your OTAQ Registration role for the company. Please reference Appendix A: OTAQ Registration Roles for further information on the OTAQ Registration Roles and their designated rights.

8 Edit Company Details

The following sections describe how to edit company details in the OTAQReg application.

> **Note:** You **MUST** have the **Company Editor** role for your company to edit company details.

8.1 Edit Company Details

Figure 8-1 OTAQ Registration Home Page

To edit a company's details, navigate to your OTAQ Registration Home Page and click the Company Name link for a company with which you have an active Company Editor role. Figure 8-2 will display.

Figure 8-2 Company Information: Company Details

The top of the page states, "You are currently in VIEW mode." Click the "Edit" button located on the top right side of the page. Figure 8-3 will display.

Figure 8-3 Company Details Edit Page

The page will now state, "You are currently in EDIT mode."

Edit the company information by typing in the textboxes, selecting new checkboxes, and/or selecting new radio buttons. The company's facility details and RCO information may also be updated. Information on how to edit these pieces of information can be found in Sections 8.4 and 8.6 respectively.

When all updates have been made, click the "Review" button. Figure 8-4 will display.

Note: If the company edits contain changes to the company's Program Types and Business Activities that have specific facility requirements, you will be prompted with an error message to edit the Facility Information accordingly.

8.2 Review Company Details Changes

Figure 8-4 Company Information: Review

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The Company Information Review page displays a read-only version of the updated company record. If the information displayed on the review screen is correct, click the "Submit" button. Figure 8-5 will display.

> **Note:** Upon landing on the Signature Page you will be prompted with a Security Warning. Please refer to Appendix C: System Java Requirements for further details.

Figure 8-5 Company Information: Print and Sign

Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms before submitting your request.

Click the "Continue" button to submit the company changes. Once you have submitted your Company Update request, you will receive an email notification stating your company update request is awaiting RCO signature along with a hard copy of your company update registration forms.

The request will also be listed in the pending requests section of your OTAQ Registration Home Page as shown in Figure 8-6. Company Updates must be signed by the Company RCO and approved by the EPA.

> **Note:** All Company Update requests require a signed RCO statement by your Company's Responsible Corporate Officer. The RCO signature statement is included in the hard copy of your company update registration forms.

8.3   Pending Company Update Request

Congratulations! You have successfully submitted your Company Update Request in the
OTAQReg application. As shown in Figure 8-6, your request will be displayed in your Pending
Requests queue on your OTAQ Registration Home Page along with its current status.

Figure 8-6 Updated Company Pending Request

To view a pending Company Update Request, click the Company Name link in the Pending

Requests Queue for a request identified with the company update icon . Figure 8-7 will
display.

Figure 8-7 Company Update Request

The Company Update Request page displays the current company information as well as a list of changes made by the request. To view the active version of the company record, click the "View Active Version" button.

To return to the OTAQReg Home Page, click the "Return" button.

To cancel the Company Update Request, click the "Cancel Request" button. The request will be canceled immediately and will no longer display in the Pending Requests queue.

8.4   Edit Facility Details

To edit Facility Details for a company, click the Facility Details tab shown in Figure 8-8 while in EDIT mode. Figure 8-9 will display.

Figure 8-8 Facility Details Tab

Figure 8-9 Company Information: Facility List

Click the facility name link. Figure 8-10 will display.

Figure 8-10 Company Information: Facility Type

The Facility Type page displays the facility's current facility type. This information is not editable for any existing facilities. Click the "Next" button. Figure 8-11 will display.

Figure 8-11 Company Information: Facility Activities

The Facility Activities page displays all possible facility activities. Select the appropriate facility activities and click the "Next" button. Figure 8-12 will display.

Figure 8-12 Company Information: Basic Facility Details

The Basic Facility Details page is pre-populated with the current facility detail information. Update the information by typing in the textboxes. When finished click the "Next" button. Figure 8-13 will display.

Figure 8-13 Company Information: Facility Details

The Facility Details page is pre-populated with the current facility information. Make any required updates to the facility specific information and click the "Save Facility" button to apply the changes. Figure 8-14 will display.

Figure 8-14 Facility List: Updated Facility

The facility will display with the updated icon . Click the "Review" button and follow the steps in Section 8.2 to complete your Company Update submission.

8.5   Remove Facility

To remove a Facility from a company, click the Facility Details tab shown in Figure 8-3 while in EDIT mode. Figure 8-15 will display.

Figure 8-15 Company Information: Facility List

Select the checkbox for the corresponding facility and click the "Remove Selected" button. Figure 8-16 will display.

Figure 8-16 Remove Facility Confirmation

Click the "Yes" button to remove the facility. Figure 8-17 will display.

Figure 8-17 Facility List: Removed Facility

The facility will display with the removed icon . Click the "review" button and follow the steps in Section 8.2 to complete your Company Update submission.

8.6   Initiate RCO Update Request

To update the RCO information for your company, click the "Initiate RCO Update Request" button shown in while in EDIT mode as seen in Figure 8-18. Figure 8-19 will display.

> **Note:** Clicking the "Initiate RCO Update Request" button will initiate a RCO Update request which is processed separately from any company edits.

Figure 8-18 Initiate RCO Update Request

Figure 8-19 RCO Update

The RCO Update page is pre-populated with the current RCO information. Update the RCO information by typing in the displayed textboxes. Please note you must enter a reason for the RCO update. Once you have completed your RCO updates, click the "Submit" button. Figure 8-20 will display.

Figure 8-20 RCO Update Confirmation Page

Click the "Click here to save copies of your registration forms" link to save a hard copy of your registration forms in PDF form. It is required that you save a copy of your registration forms before submitting your request.

Click the "Continue" button to finalize your RCO update request. An email will be sent to you, the current company RCO, and the new company RCO (if applicable) containing a hardcopy of the request and confirming your RCO update request. The request will also be listed in the pending requests section of your OTAQ Registration Home Page as shown in Figure 8-21.

> **Note:** All RCO Updates must be hand-signed by the existing company RCO and the new company RCO (if the RCO is changing) and mailed to the Fuels Program. The signature letter is included in the hard copy of the request. In addition the RCO must submit the RCO Change Letters located at http://www.epa.gov/otaq/fuels/reporting/registration-letters.htm#letter1

8.7   Pending RCO Update Request

Congratulations! You have successfully submitted your RCO Update Request in the OTAQReg application. As shown in Figure 8-21, your request will be displayed in your Pending Requests queue on your OTAQ Registration Home Page along with its current status.

Figure 8-21 Pending RCO Update

To view a pending RCO Update Request, click the Company Name link in the Pending Requests Queue for a request identified with the RCO update icon 👤. Figure 8-22 will display.

Figure 8-22 RCO Update Request

The RCO Update Request page displays the current RCO information as well as a list of changes made by the request. To return to the OTAQReg Home Page click the "Return" button.

To cancel the RCO Update Request, click the "Cancel Request" button. The request will be canceled immediately and will no longer display in the Pending Requests queue.

9 Appendix A: OTAQ Registration Roles

9.1 OTAQ Registration Roles

- Limited Company Viewer: This role has limited read-only access to associated company and facility information

- Company Viewer: This role has full read-only access to associated company and facility information

- Company Editor: This role has full viewing and editing rights to associated company and facility information

9.2 OTAQ Program Roles:
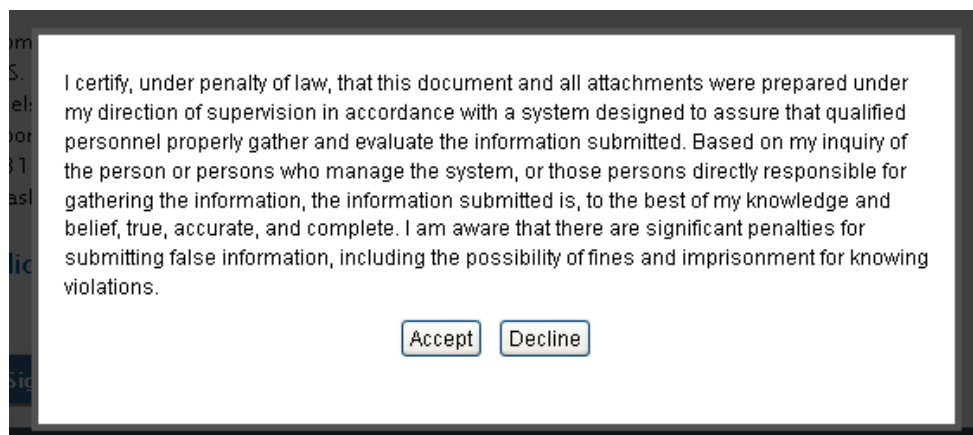
- Cellulosic Biofuel Waiver Credits (Pay.gov) Submitter: Users should select this role if they are registering for the Cellulosic Biofuel Waiver Credits Pay.gov application to purchase cellulosic biofuel waiver credits on behalf of the company (This role should only be selected if the company registered as a gasoline or diesel refiner, or a non-renewable fuels importer)

- DC Fuels Submitter, Title 40 CFR Part 80 Subparts A,B,C,D, and F: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 80 Regulation of Fuels and Fuel Additives

- DC Fuels Submitter, Title 40 CFR Part 80 Subparts D, E, F, H, J, and L: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 80 Reformulated Gasoline / Anti-Dumping / Gasoline Toxics / Gasoline Sulfur / Gasoline Benzene

- DC Fuels Submitter, Title 40 CFR Part 80 Subpart I: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 80 Motor Vehicle, Nonroad, Locomotive, and Marine Diesel Fuel

- DC Fuels Submitter, Title 40 CFR Part 80 Subparts K and M: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 80 Renewable Fuel Standard

- DC Fuels Submitter ,Title 40 CFR Part 98 Subpart LL: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 98 Suppliers of Coal-based Liquids

- DC Fuels Submitter ,Title 40 CFR Part 98 Subpart MM: Users should select this role if they are registering for the DC Fuels data flow and Title 40 CFR Part 98 Suppliers of Petroleum Products

- EMTS Viewer: User should select this role if they are requesting view-only access to the EMTS data flow

- EMTS Submitter: Users should select this role if they are requesting both editing and submitting rights to EMTS

- Agent: Users should select this role if they are an agent for a company (The definition of an agent is a person who is not a direct employee of the company)

10   Appendix B: Using the eSignature Widget

Users should refer to the steps outlined in this section to successfully sign submissions within the OTAQReg application.

Upon selecting the "Submit" button for an OTAQReg submission, you will be prompted with the certification statement displayed in Figure 10-1.

Figure 10-1 Certification Statement

Upon reading the full agreement, click the "Accept" button. Figure 10-2 will display.

Figure 10-2 Authentication

This page requires you to verify your CDX identity. The page displays your CDX User ID and a field to provide your CDX password. If you enter an incorrect password, you will be prompted with an error message. After three failed attempts, your CDX account will be locked. To unlock your account, contact the CDX Help Desk at 888-890-1995 or heldesk@cdx.net.

Enter your CDX user account password and click the "Login" button. Figure 10-3 will display.

Figure 10-3 Answer Secret Question

The next step is to provide the answer to your secret question. The page will display one of the five secret questions you chose during your eSignature PIN verification.

If you fail to respond or enter an incorrect answer, you will be prompted with an error message. Please note that the secret question will not change should you answer incorrectly. After three failed attempts, your CDX account will be locked. To unlock your account, contact the CDX Help Desk at 888-890-1995 or heldesk@cdx.net.

Enter the answer you provided during your eSignature PIN verification and click the "Answer" button. Figure 10-4 will display.

Figure 10-4 Sign File

Click the "Sign" button.

Congratulations! You have successfully electronically signed and submitted your OTAQReg submission.

11 Appendix C: System Java Requirements

In order to electronically sign submissions in OTAQReg, the system requires that you have Java Runtime Environment (JRE) 1.6.0_11+ installed on your device. During your first submission attempt in OTAQReg, you will be prompted with the message seen in Figure 11-1 if you do not have JRE installed.

> **Note:** Certain configurations require administrator rights to install and update JRE. Please check your corporate IT policy before installing and using this software.

Figure 11-1 JRE Installation
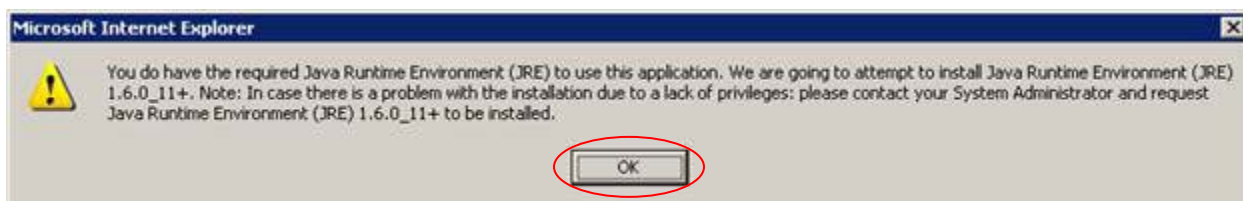
Click the "OK" button to download Java Runtime Environment.

If your device already has JRE installed, then you will be prompted with a security warning on the Print and Sign page of your requests. This security warning will vary depending on the web browser you are using as seen in Figures Figure 11-2 thru Figure 11-5.

Figure 11-2 Mozilla Firefox Security Warnings

Figure 11-3 Internet Explorer Security Warnings
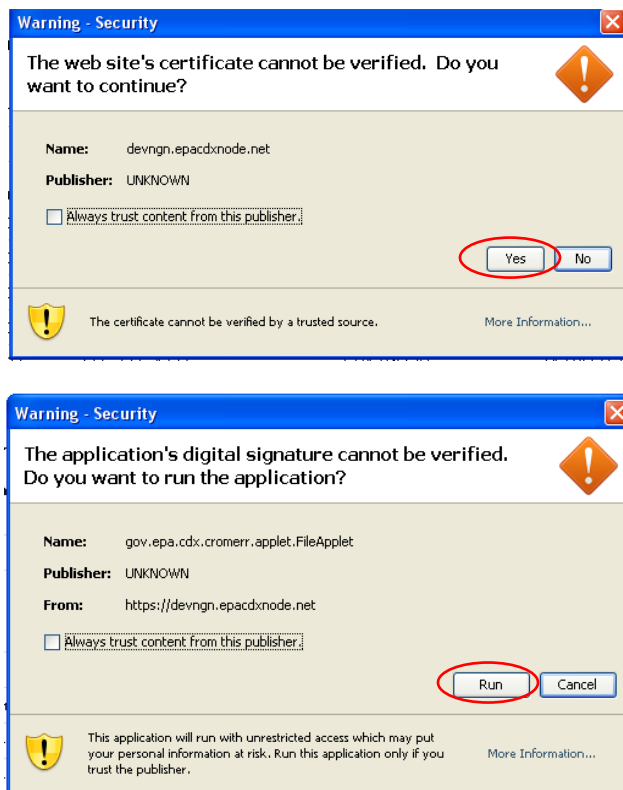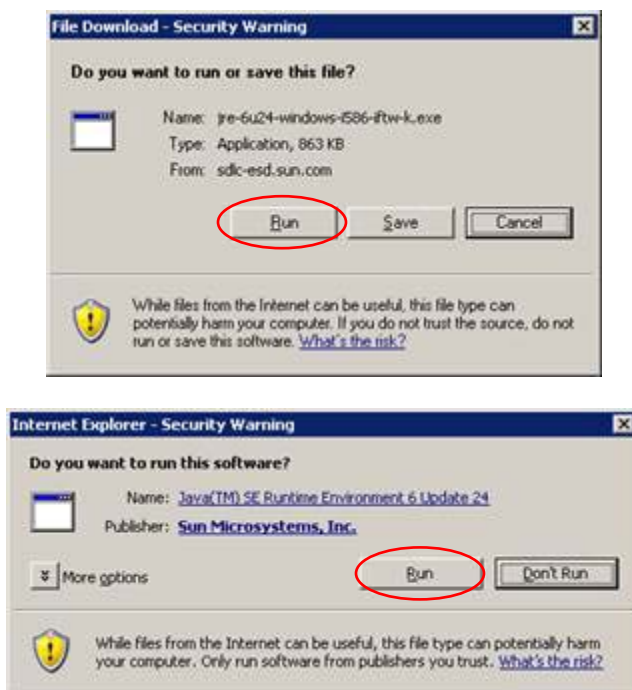

Figure 11-4 Safari Security Warnings
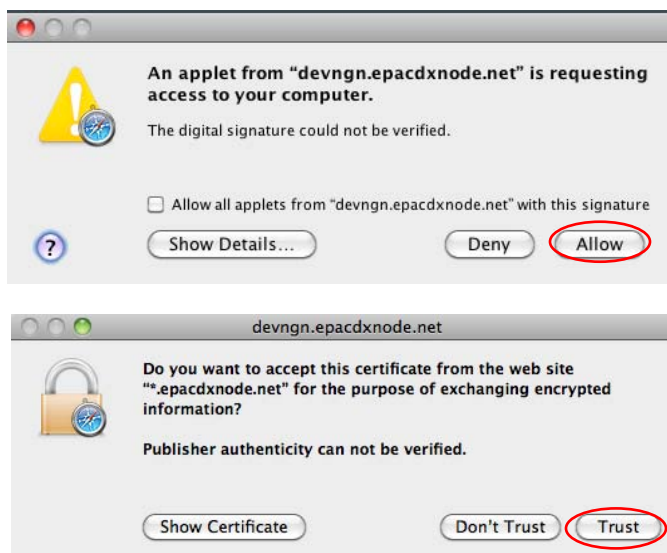
Figure 11-5 Google Chrome Security Warnings
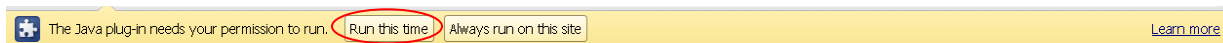
Select the "Run", "Trust", or "Allow" button (depending on your web browser). You may be prompted with two Security Warnings, continue to select the "Run", "Trust" or "Allow" button.

12   Appendix D: OTAQ Registration Lists

Users can view and download the OTAQ Registration Lists by clicking any of the hyperlinks provided in the Registration Lists section of their OTAQ Registration Home Page as seen in Figure 12-1.

Figure 12-1 Registration Lists
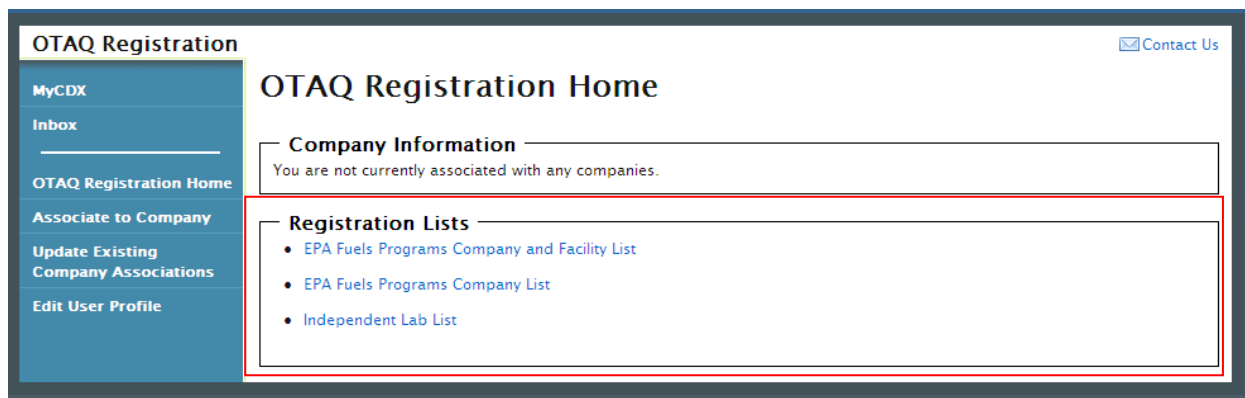
13   Appendix E: Support Information

For frequently asked questions about the content, formats, or policies for the Office of Transportation and Air Quality (OTAQ) please reference the Fuels Program website at http://www.epa.gov/otaq/fuels.htm.

You may also contact the EPA Fuels Program Support Line at 202-343-9755 or by sending an email to EPAFuelsPrograms@epa.gov.

For any general or technical questions related to the Central Data Exchange you may contact any of the following:

- Telephone - Person-to-person telephone support is available from the CDX Help Desk 8:00 am to 6:00 pm EST. Call our toll-free line at 888-890-1995.

- Email - Send e-mail to Technical Support at helpdesk@epacdx.net with "Technical Support" in the Subject line.