



Welcome to the Lead Training Provider Preparer Role user guide!

Summary of Contents



- Adding a Preparer to an existing Training Program
- Preparer CDX registration
- Making submissions as a Preparer
- Reviewing Preparer submissions
- Deactivating Preparer dashboards

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This user guide will walk through the following processes: adding a preparer to an existing Training Program, Preparer CDX registration, making submissions as a Preparer, reviewing Preparer submissions, and deactivating Preparer dashboards.

Adding a Preparer to an existing Training Program



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CDX

Lead Training Provider Dashboard

Contact Us
Logged in as CPSURBANO (Log out)

Training Provider Test
123 Test, Arlington, VA 12345
(703) 227-5577

To Do List (More Info) [Expand To Do List](#) | [View Calendar](#)

- There are no future required actions at this time.

Quick Actions

- [New Pre-Training Notification](#)
- [New Post-Training Notification](#)
- [CDX Inbox](#)

Training Notifications
Submit new training notifications or manage previously submitted notifications for your training program.

Manage People and Facilities
Add or remove instructors, program managers, or facilities for your training program.

Manage Preparers and Submissions
Add or remove preparers, review and sign pending submissions.

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Preparers must be added by the Training Program Manager through the 'Manage Preparers and Submissions' tile on the Training Provider dashboard.

Adding a Preparer to an existing Training Program



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Logged in as CPSURBANO (Log out)

Preparer and Submission Management Home

Listed below are your existing preparers and pending submissions. You may add a new preparer or activate/deactivate an existing preparer. Pending items will [Back to Dashboard](#) have to be reviewed and signed before submission.

Preparers Add Preparer

First Name	Last Name	Status	Actions
No data available in table			

Showing 0 to 0 of 0 entries Previous Next

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Click "Add Preparer."

Adding a Preparer to an existing Training Program

A screenshot of a web application interface. At the top left is the EPA logo and the text 'United States Environmental Protection Agency'. Below this is a navigation menu with links for 'Home', 'About', 'Recent Announcements', 'Terms and Conditions', 'FAQ', and 'Help'. On the right side of the header, there is a 'Contact Us' link and a user status indicator 'Logged in as CFSURBANO (Log out)'. The main content area is titled 'Add a Preparer' and includes a 'Back to Dashboard' link. The central part of the form is a box titled 'Add Preparer' containing the instruction: 'Enter the preparer's name in the fields below. After the preparer's name has been added, the preparer will have to register through [here](#)'. Below this instruction are two input fields: 'First Name *' and 'Last Name *'. At the bottom of the form are two buttons: 'Submit Preparer' and 'Cancel'.

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Enter the preparer's name in the fields on the 'Add a Preparer' page.

Adding a Preparer to an existing Training Program



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Logged in as CPSURBANO (Log out)

Preparer and Submission Management Home

Listed below are your existing preparers and pending submissions. You may add a new preparer or activate/deactivate an existing preparer. Pending items will [Back to Dashboard](#) have to be reviewed and signed before submission.

Preparers [Add Preparer](#)

First Name	Last Name	Status	Actions
Preparer	Test	Ready for Registration	Activate Delete

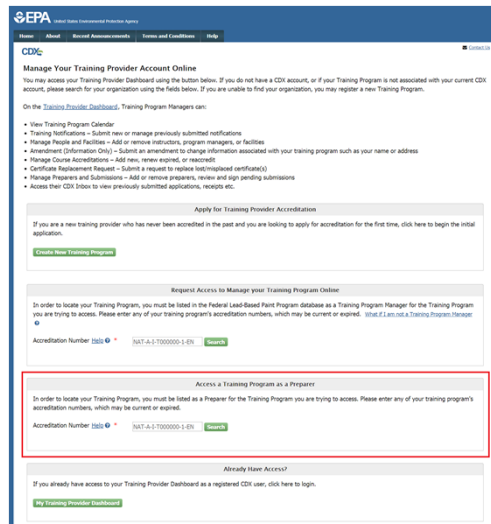
Showing 1 to 1 of 1 entries

Previous **1** Next

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When a preparer is added their name will show up in the Preparers table. After a preparer's name is added to the Preparers table, the preparer is able to register for a CDX account through the Training Provider public site.

Preparer CDX Registration



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To begin the process of preparer CDX registration the preparer will have to navigate to the Training Provider public site located at <https://cdx.epa.gov/XCDX/LeadTpCertification/Public>.

Preparer CDX Registration



Access a Training Program as a Preparer

In order to locate your Training Program, you must be listed as a Preparer for the Training Program you are trying to access. Please enter any of your training program's accreditation numbers, which may be current or expired.

Accreditation Number [Help](#)  *

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Under 'Access a Training Program as a Preparer,' the preparer must enter the accreditation number associated with their training program.

Preparer CDX Registration



Access a Training Program as a Preparer

In order to locate your Training Program, you must be listed as a Preparer for the Training Program you are trying to access. Please enter any of your training program's accreditation numbers, which may be current or expired.

Accreditation Number [Help](#) *

Search Results

We found your training program! To request access to this Training Provider's Dashboard, as a preparer, provide the following information.

Preparer Details

Training Program Name Training Provider Test
Training Program Address 123 Test, Arlington, VA, 12345

Preparer's Full Name [Help](#) *

After running the search, the training program's information will appear and the preparer will be prompted to enter their name in the fields highlighted above. Note the preparer must enter the exact name that was entered into the Preparers table by the Training Program Manager.

Preparer CDX Registration



Access a Training Program as a Preparer

In order to locate your Training Program, you must be listed as a Preparer for the Training Program you are trying to access. Please enter any of your training program's accreditation numbers, which may be current or expired.

Accreditation Number [Help](#) *

Search Results

We found your training program! To request access to this Training Provider's Dashboard, as a preparer, provide the following information.

Preparer Details

Training Program Name Training Provider Test
Training Program Address 123 Test, Arlington, VA, 12345
Preparer's Full Name [Help](#) *

The name provided did not match the data on file for this training provider. Please try your search again, or contact the Training Program Manager if you need assistance.

The preparer will see this message if the entered name does not match the name saved by the Training Program Manager in the Preparers table.

Preparer CDX Registration



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CDX Contact Us

Completion Checklist

Account Information

New to CDX?

Are you a new user to the system, and would you like to create an account?

[Register](#)

Already Registered?

Do you have an existing Central Data Exchange account?

User ID

Password

[Log In to CDX](#)

[Forgot your Password?](#) | [Forgot your User ID?](#) | [Help](#)

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If the name entered on the public site matches the name entered by the training program manager, the preparer will be brought to the CDX Log In/Register page. Preparers with an existing CDX account can log in and have their account associated with the training program. Preparers without an existing CDX account should click “Register” and register for a new account.

Preparer CDX Registration



The screenshot shows the EPA's CDX registration interface. At the top, there's a navigation bar with 'Home', 'About', 'Account Administration', 'Terms and Conditions', and 'Help'. The main content area is titled 'CDX' and 'Account Information'. It features a 'Completion Checklist' on the left and a 'Please enter your full legal name.' instruction. The form fields are as follows:

- Name Title * (Please Select)
- Full Name * (Preparer (P.L.), Text)
- User ID * (You may use your email address or another unique identifier)
- User Password *
- Re-type Password *
- Security Question 1 * (Please Select)
- Security Answer 1 *
- Security Question 2 * (Please Select)
- Security Answer 2 *
- Security Question 3 * (Please Select)
- Security Answer 3 *
- Training Provider Text (133 Text, Arlington, VA, US, 12245)
- Email * (Please provide an email address to which you have access, as you will be required to submit this during the process)
- Re-enter Email *
- Firm Phone Number * (Extension)

At the bottom, there is a checkbox for 'I Agree to the Terms and Conditions' and a green 'Register Account' button.

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Users who are registering for the first time will have to complete all the fields on this page.

Preparer CDX Registration



The screenshot shows the EPA CDX registration interface. At the top left is the EPA logo and 'United States Environmental Protection Agency'. A navigation bar includes 'Home', 'About', 'Recent Announcements', 'Terms and Conditions', 'FAQ', and 'Help'. On the right, there is a 'Contact Us' link and a user login status: 'Logged in as: CPSURBANO267 (Log out)'. The main content area is titled 'Email Validation' and contains the following text: 'A link was sent to the email address you provided (). Please click the link in the email to complete the submission process.' Below this, it says: 'Haven't received your validation code yet? You can resend it by clicking [here](#).' On the left side of the content area, there is a 'Completion Checklist' with 'Account Information' highlighted.

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A validation email will be sent to the email address entered on the previous page.

Preparer CDX Registration



Tue 5/1/2018 3:35 PM

devlannotice@epacdx.net

Registration Email Verification Request (DEV)

We removed extra line breaks from this message.

You have successfully created an account with the EPA Central Data Exchange (CDX). In order to complete your registration and begin using the system, you will need to confirm your account by clicking the hyperlink below and successfully logging in. You will need to enter the UserID (CPSURBANO267) and Password that were selected during the registration process.

<https://dev.epacdx.net/XCDX/LeadTpcCertification/PreparerRegistration/Confirmation?code=942a9f10-b219-446d-904c-15c3ed812896>

If you click the link and it appears to be broken, please copy and paste it into a new browser window.

Once you have successfully logged into your account, you may be required to provide additional information. Any additional information will need to be completed before you are able to access your Program Service.

Please do not respond to this message. If you have questions concerning this request, you may contact us 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.

Sincerely
CDX Help Desk

United States Environmental Protection Agency - Central Data Exchange

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The user will have to click the link in the message to validate their email address and complete registration.

Preparer Dashboard



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CDX Contact Us
Logged in as CPSURBAN0267 (Logout)

Lead Training Provider Preparer Dashboard

Training Provider Test
123 Test, Arlington, VA 12345
(703) 227-5577

To Do List ([More Info](#)) [Expand To Do List](#) | [View Calendar](#)

- There are no future required actions at this time.

Quick Actions

- [New Pre-Training Notification](#)
- [New Post-Training Notification](#)

Training Notifications
Submit new training notifications or manage previously submitted notifications for your training program.

Manage People and Facilities
Add or remove instructors, program managers, or facilities for your training program.

View Pending Submissions
View Pending Submissions that have been submitted to the Training Program Manager.

Manage Course Accreditations
Add new course accreditations, renew expired course accreditations, or reaccredit existing course accreditations.

Certificate Replacement Request
Submit a request to replace lost/misplaced certificate(s).

Amendment - Information Only
Submit an amendment to change information associated with your training program such as your name or address.

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Clicking the link in the validation email will lead the user directly to the Lead Training Provider Preparer Dashboard. The preparer dashboard allows the preparer to fill out notifications and applications that will be sent to the Training Program Manager for review. Notifications and applications filled out by a preparer will need to be approved and signed by the Training Program Manager before submission to EPA.

Making submissions as a Preparer



Date	Start Time	End Time	Actions
5/24/18	9:00 AM	5:00 PM	
5/25/18	9:00 AM	5:00 PM	

[Submit for Manager Review](#) [Edit](#) [Do Not Submit - Return to Notifications Home](#)

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Notifications and applications are displayed the same way on the preparer dashboard, but a preparer will see a 'Submit for Manager Review' button in place of the 'Sign' button. Preparers are not able to enter payment information on applications that require payments (course accreditations, certificate replacement requests) – the program manager will have to enter payment information for these applications when these are reviewed.

Making submissions as a Preparer



The screenshot displays the EPA CDX Lead Training Provider Preparer Dashboard. At the top, the EPA logo and navigation menu are visible. A green confirmation banner at the top of the dashboard reads "Application successfully submitted". The dashboard title is "Lead Training Provider Preparer Dashboard". On the right side, the user is identified as "Training Provider Test" with contact information: "123 Test, Arlington, VA 12345 (703) 227-5577".

The dashboard contains several sections:

- To Do List (More Info):** A section with a checkmark icon indicating that there are no future required actions at this time. It includes links for "Expand To Do List" and "View Calendar".
- Quick Actions:** A section with an information icon containing two links: "New Pre-Training Notification" and "New Post-Training Notification".
- Training Notifications:** A section with a bell icon, describing the ability to submit new training notifications or manage previously submitted ones.
- Manage People and Facilities:** A section with a group of people icon, describing the ability to add or remove instructors, program managers, or facilities.
- View Pending Submissions:** A section with a list icon, describing the ability to view pending submissions submitted to the Training Program Manager.

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This confirmation message will generate when a preparer successfully submits an item for manager review.

Making submissions as a Preparer



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CDX

Lead Training Provider Preparer Dashboard

Contact Us
Logged in as CPSURBANOS (Log out)
Training Provider Test
123 Test, Arlington, VA 12345
(703) 227-5577

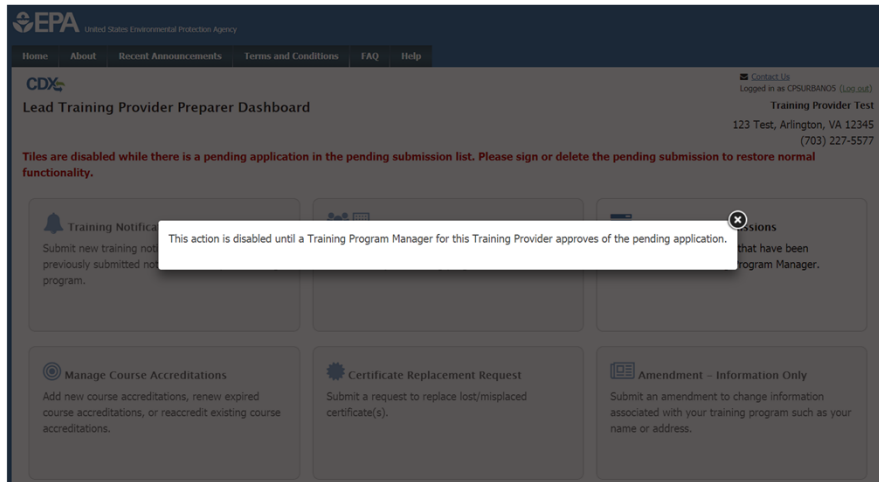
Tiles are disabled while there is a pending application in the pending submission list. Please sign or delete the pending submission to restore normal functionality.

- Training Notifications**
Submit new training notifications or manage previously submitted notifications for your training program.
- Manage People and Facilities**
Add or remove instructors, program managers, or facilities for your training program.
- View Pending Submissions**
View Pending Submissions that have been submitted to the Training Program Manager.
- Manage Course Accreditations**
Add new course accreditations, renew expired course accreditations, or reaccredit existing course accreditations.
- Certificate Replacement Request**
Submit a request to replace lost/misplaced certificate(s).
- Amendment - Information Only**
Submit an amendment to change information associated with your training program such as your name or address.

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When a preparer makes a submission that is NOT a notification (people and facilities, course accreditations, certificate replacement requests, and info only amendments), the preparer's access to the dashboard will be limited to the 'View Pending Submissions' tile. The preparer cannot generate further submissions until that submission is reviewed and signed or deleted.

Making submissions as a Preparer



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The preparer will see this message if they click on a disabled tile.

Making submissions as a Preparer



The screenshot displays the EPA CDX interface for pending submissions. At the top, there is a navigation bar with links for Home, About, Recent Announcements, Terms and Conditions, FAQ, and Help. The user is logged in as CPSURBANO267. The main content area is titled 'Pending Submissions' and contains a table with the following data:

Preparer Name	Preparer User ID	Creation Date	Application Type	Status
Ms. Preparer Test	CPSURBANO267	5/1/2018	Training Notifications Pre	View Delete
Ms. Preparer Test	CPSURBANO267	5/1/2018	Certificate Replacement Request	View Delete

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The preparer can view all pending submissions by clicking the “View Pending Submissions” tile. The preparer can view and delete submissions on this page.

Reviewing Preparer submissions



EPA United States Environmental Protection Agency

Home About Recent Announcements Terms and Conditions FAQ Help

CDX

Contact Us
Logged in as CPSURBANO (Log out)

Training Provider Test
123 Test, Arlington, VA 12345
(703) 227-5577

Tiles are disabled while there is a pending application in the pending submission list. Please sign or delete the pending submission to restore normal functionality.

- Training Notifications**
Submit new training notifications or manage previously submitted notifications for your training program.
- Manage People and Facilities**
Add or remove instructors, program managers, or facilities for your training program.
- Manage Preparers and Submissions**
Add or remove preparers, review and sign pending submissions.
28 Pending Submission(s)
- Manage Course Accreditations**
Add new course accreditations, renew expired course accreditations, or reaccredit existing course accreditations.
- Certificate Replacement Request**
Submit a request to replace lost/misplaced certificate(s).
- Amendment - Information Only**
Submit an amendment to change information associated with your training program such as your name or address.

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The Training Program Manager's dashboard is also limited when the preparer submits a people and facilities amendment, course accreditation application, certificate replacement request, or info only amendment. The manager will need to sign these pending submissions by accessing them through the 'Manage Preparers and Submissions' tile.

Reviewing Preparer submissions



Contact Us
Logged in as CPSURBANO (Log out)

Preparer and Submission Management Home

Listed below are your existing preparers and pending submissions. You may add a new preparer or activate/deactivate an existing preparer. Pending items will [Back to Dashboard](#) have to be reviewed and signed before submission.

Preparers			Add Preparer
First Name	Last Name	Status	Actions
Preparer	Test	Activated	Deactivate Delete

Showing 1 to 1 of 1 entries

Previous 1 Next

Pending Submissions				
Preparer Name	Preparer User ID	Creation Date	Application Type	Status
Ms. Preparer Test	CPSURBANO267	5/1/2018	Training Notifications Pre	Review Delete
Ms. Preparer Test	CPSURBANO267	5/1/2018	Certificate Replacement Request	Review Delete

Showing 1 to 2 of 2 entries

Previous 1 Next

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All pending submissions are listed in the 'Pending Submissions' table on the 'Preparer and Submission Management Home' page. The training program manager can click "Review" to review and sign a submission or "Delete" to delete a submission. Pending submissions on this table are not sent to EPA until reviewed and signed by the training program manager.

Reviewing Preparer submissions



Review Pre-Training Notification

Pre-Training Notification Information

Identification Number *
Abatement Worker * (Jobid / All / English) | LPA-A-07123346-1-EN

Training Facility Information

Training Facility * 123 Test, Arlington, Virginia, 12345

Location Name
Location Phone Number * (703) 221-5677
Location Phone Number Ext

Instructor Information

Training Instructor * Page Urbano

Training Dates

Date	Start Time	End Time	Actions
5/24/18	9:00 AM	5:00 PM	
5/25/18	9:00 AM	5:00 PM	

Training Program

To change any of the below information you will have to submit an Informational Amendment application.

Training Provider First
123 Test
Arlington, VA, 12345
(703) 221-5677

I hereby attest and affirm that the information included on this notification form is true and accurate to the best of my belief and knowledge. I acknowledge that any approval authorized pursuant to this notification will be subject to revocation if accurate was based on incorrect or inadequate information that materially affected the decision to issue the approval.

Sign Notification Edit Cancel Submission

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Clicking “Review” on a notification submission brings the program manager to the ‘Review Pre-Training Notification’ page. Here the manager can review information submitted by the preparer and sign notifications to submit to EPA.

Reviewing Preparer submissions



The screenshot displays the EPA CDX web interface. At the top, the EPA logo and "United States Environmental Protection Agency" are visible. A navigation menu includes "Home", "About", "Recent Announcements", "Terms and Conditions", "FAQ", and "Help". The CDX logo is also present, along with a "Contact Us" link and a user login status: "Logged in as CPSURBANO (Log out)". A green notification banner states "Form T373385 Successfully Created". Below this, the "View Pre-Training Notification" section includes links for "Notifications Home" and "Print", and a "Back to Dashboard" link. The "Pre-Training Notification Information" section shows "Accreditation Number: *" and "Abatement Worker : Initial : All : English : LBP-A-1-T151349-1-EN".

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The training program manager will see this message to confirm that the notification has been successfully submitted.

Reviewing Preparer submissions



The amount owed for your Training Provider Certification is listed below:

Certificate Replacement Fees: \$15

Pay Via Credit/Debit Card
 Pay Via Bank Account (ACH)
 Submit Using Payment Code

Credit/Debit Card Transaction

Account Holder Name *

Payment Amount \$15

Billing Address *

Billing Address 2

City *

State *

Zip *

Card Number *

Security Code *

Expiration Date * /

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Submissions that require payment information will open to the 'Review and Payment' page. Here the manager can review information submitted by the preparer, add payment information, sign, and submit to EPA. Preparers do not have the ability to add payment information on the preparer dashboard, so payment information must always be added by the Training Program Manager during review.

Reviewing Preparer submissions



Contact Us
Logged in as CPSURBANO (Log out)

Application Number: T373384
Date: May 01, 2018

Your certificate replacement request has been sent to the EPA for review. Once the request is processed, you will receive a copy of your certificate by email from lead.paint@epa.gov. It is best that you add this address to your email's 'safe' list as it may be classified as spam by some email programs.

Lead Training Provider Dashboard

Training Provider Test
123 Test, Arlington, VA 12345
(703) 227-5577

To Do List (More Info)

[Expand To Do List](#) | [View Calendar](#)

- 05/11/2018 : Notification T373385 : Post-Training Notification Due

Quick Actions

- [New Pre-Training Notification](#)
- [New Post-Training Notification](#)
- [CDX Inbox](#)

Training Notifications

Submit new training notifications or manage previously submitted notifications for your training program.

Manage People and Facilities

Add or remove instructors, program managers, or facilities for your training program.

Manage Preparers and Submissions

Add or remove preparers, review and sign pending submissions.

The Training Program Manager will see this message to confirm that the application has been successfully submitted.

Deactivating Preparer dashboards



The screenshot shows the EPA CDX Preparer and Submission Management Home page. The page header includes the EPA logo and navigation links: Home, About, Recent Announcements, Terms and Conditions, FAQ, and Help. The user is logged in as CPSURBANO. The main content area is titled 'Preparer and Submission Management Home' and contains a table of preparers. The table has columns for First Name, Last Name, Status, and Actions. The first row shows a preparer named 'Preparer Test' with a status of 'Activated'. The 'Deactivate' button in the Actions column is highlighted with a red box. There is also a 'Delete' button next to it. The page indicates 'Showing 1 to 1 of 1 entries' and has 'Previous', '1', and 'Next' navigation options.

First Name	Last Name	Status	Actions
Preparer	Test	Activated	Deactivate Delete

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If for any reason the Training Program Manager needs to disable a preparer's dashboard, they can do this by clicking "Deactivate" next to the preparer's name on the 'Preparer and Submission Management Home' page.

Deactivating Preparer dashboards



The screenshot shows the EPA CDX website interface. At the top, there is a navigation bar with links for Home, About, Recent Announcements, Terms and Conditions, and Help. Below this is the CDX logo and a 'Contact Us' link. A prominent red error message banner reads: "No preparer role active for this User Role". Below the banner, the page title is "Manage Your Training Provider Account Online". The main content area contains a paragraph explaining that users can access their Training Provider Dashboard using a button below, and provides instructions for users who do not have a CDX account or whose Training Program is not associated with their current CDX account. A list of links for Training Program Managers is provided, including: View Training Program Calendar, Training Notifications, Manage People and Facilities, Amendment (Information Only), Manage Course Accreditations, Certificate Replacement Request, Manage Preparers and Submissions, and Access their CDX Inbox. At the bottom, there is a section titled "Apply for Training Provider Accreditation" with a link for new providers.

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A preparer whose dashboard has been deactivated will be redirected to the public site and see this message when they try to access their dashboard. A preparer’s dashboard may also be reactivated any time by clicking the “Reactivate” button next to their name on the ‘Preparer and Submission Management Home’ page.