Training Provider Preparer Role User Guide

Updated 05/11/2018

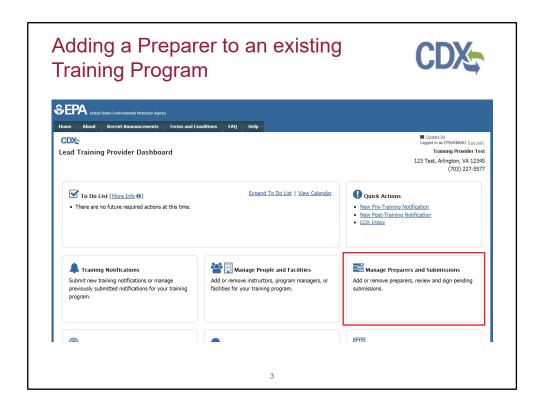Welcome to the Lead Training Provider Preparer Role user guide!
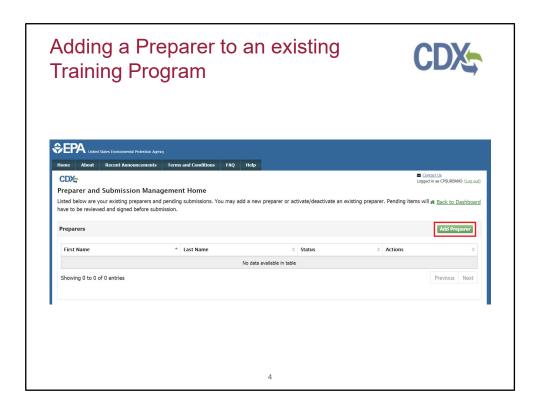
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- Adding a Preparer to an existing Training Program
- Preparer CDX registration
- Making submissions as a Preparer
- Reviewing Preparer submissions
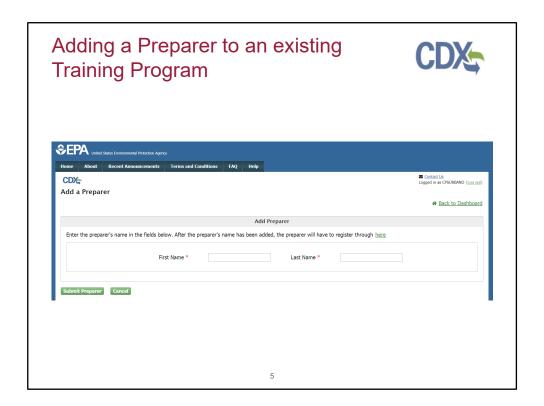- Deactivating Preparer dashboards

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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

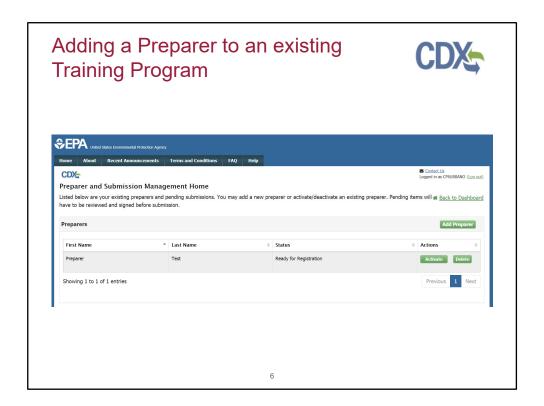Preparers must be added by the Training Program Manager through the 'Manage Preparers and Submissions' tile on the Training Provider dashboard.
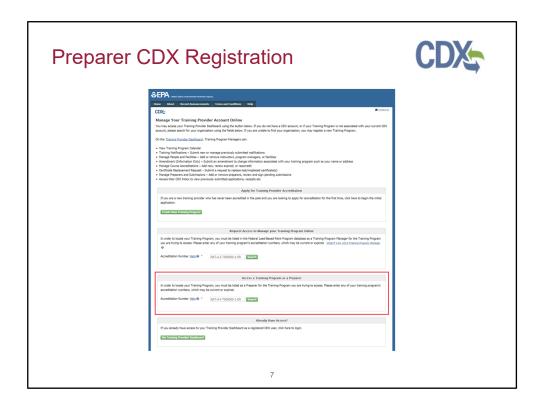
Adding a Preparer to an existing Training Program

Click "Add Preparer."

Adding a Preparer to an existing Training Program

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

Adding a Preparer to an existing Training Program

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.
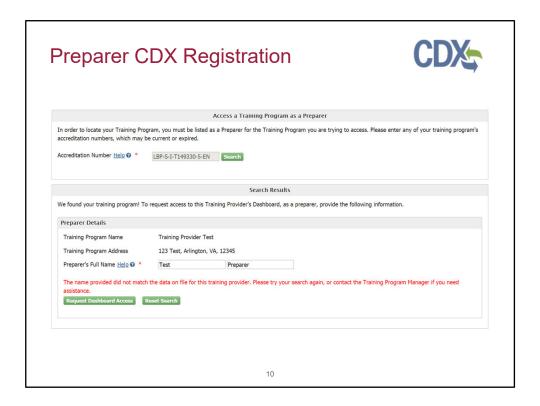
Preparer CDX Registration

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 ❓ *   LBP-S-I-T149330-5-EN   [Search]

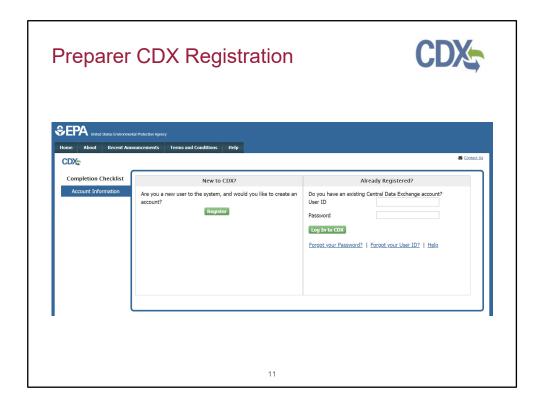Under 'Access a Training Program as a Preparer,' the preparer must enter the accreditation number associated with their training program.
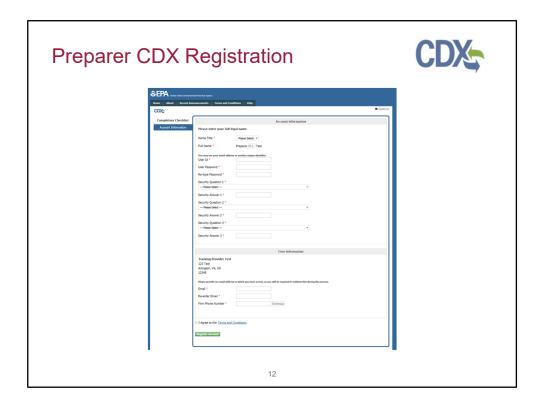
After running the search, the training program's information will appear and the preparer will be prompted to enter their name in the fields highlighted above. Note the preparer must enter the exact name that was entered into the Preparers table by the Training Program Manager.
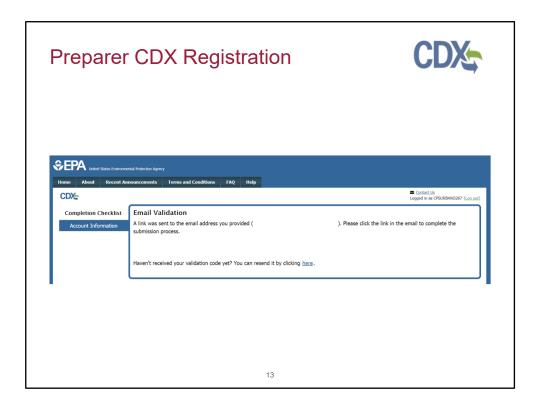
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Accreditation Number Help ❓ *   LBP-S-I-T149330-5-EN   [Search]

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 ❓ *	Test	Preparer

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.

[Request Dashboard Access] [Reset Search]

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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.
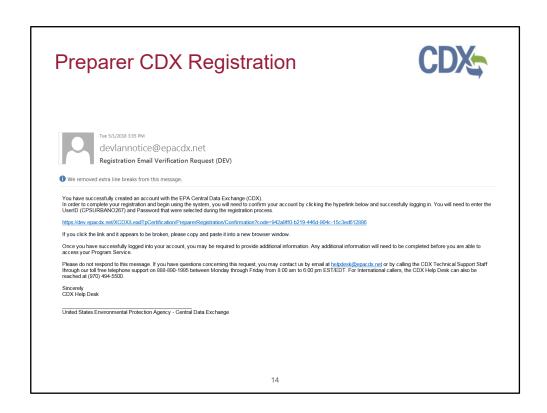
Preparer CDX Registration

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.
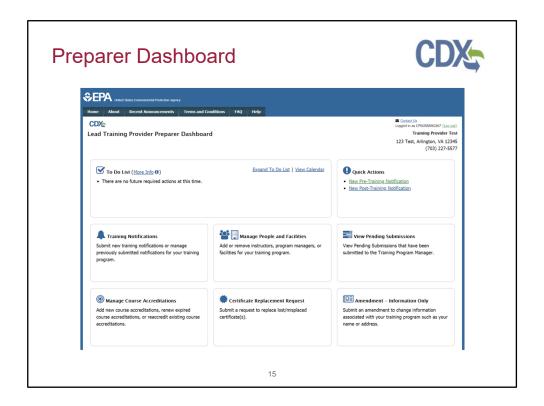
Preparer CDX Registration

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

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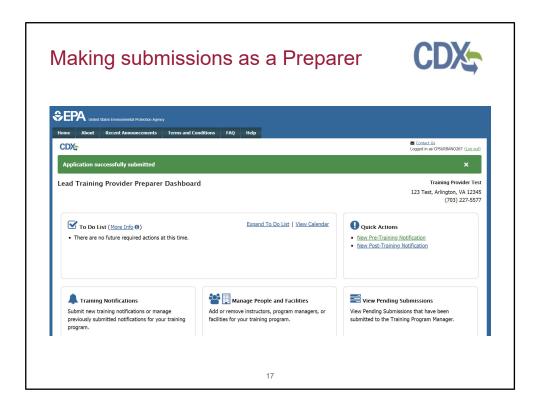
Preparer CDX Registration

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/LeadTpCertification/PreparerRegistration/Confirmation?code=942a9ff0-b219-446d-904c-15c3ed612886

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.
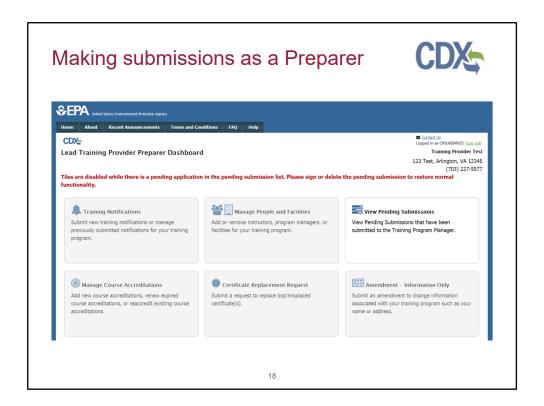
Preparer Dashboard

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.
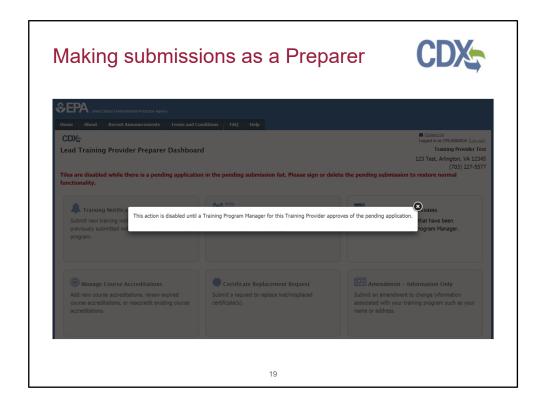
Making submissions as a Preparer

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.
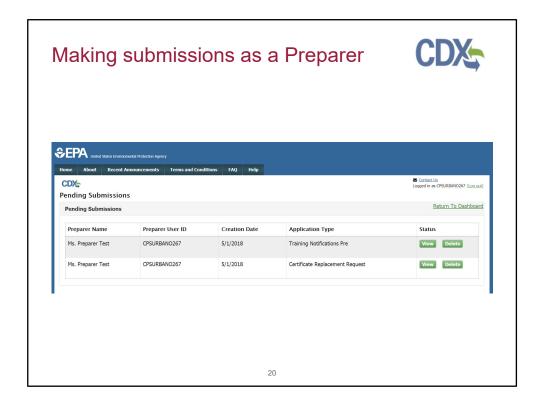
Making submissions as a Preparer

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

Making submissions as a Preparer

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

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

Making submissions as a Preparer

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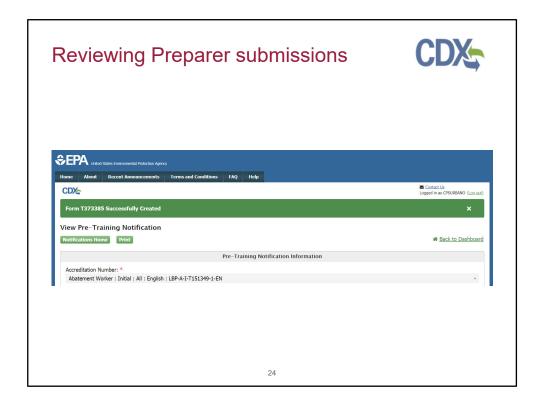
Reviewing Preparer submissions

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.
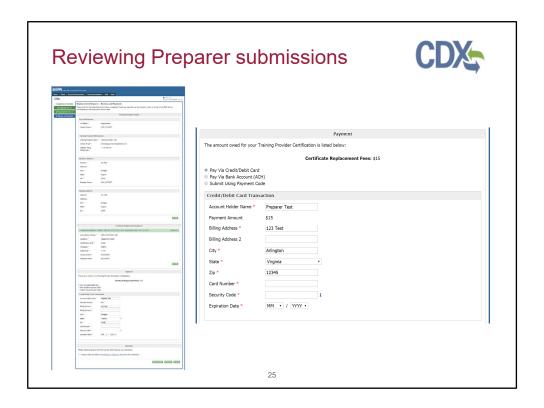
Reviewing Preparer submissions

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.
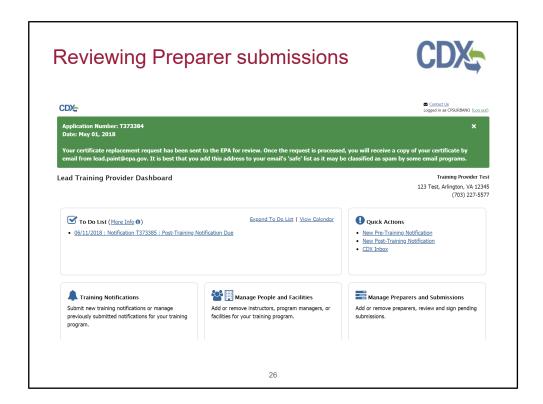
Clicking "Review" on a notification submission brings the program manager to the 'Review Pre-Training Notification' page. Here the manager can review information submitted by the preparer and sign notifications to submit to EPA.
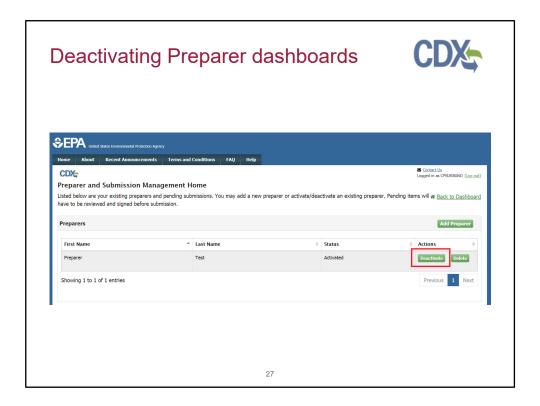
The training program manager will see this message to confirm that the notification has been successfully submitted.
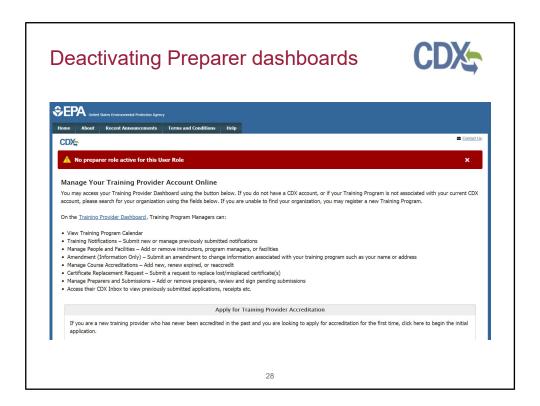
Reviewing Preparer submissions

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

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

Deactivating Preparer dashboards

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

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.