CDX-CBS-ECMPS Beta Start-up Guide

Published 11/21/2023

Summary: This document details key points and steps to register for a CDX test account to log into ECMPS Beta and CBS Beta.

If you have comments, recommendations, or questions on this guide, please send an email to cbs-testing@camdsupport.com

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Beta Environment Links

CDX Test URL: https://test.epacdx.net/

- This is the CDX Test environment

CDX workflow: EASEY Beta: Emissions and Allowance System for Energy Beta

CBS Beta URL: https://cbsprodbeta.epa.gov/CBS

- Use CDX Test username and password

ECMPS 2.0 Beta URL: https://ecmps-beta.app.cloud.gov/

- Use CDX Test username and password

Key Notes

1. The organization ID in CDX must match amongst the appropriate people that you work with. It is very important that the organization of the DR, ADR, and agents/consultants is the same. **Keep track of your organization ID(s).** You can find your CDX organization ID(s) on your CDX Profile page.
2. When registering in CDX Test for testing in the ECMPS Beta environment, it is very important that you **use the same email address that is in CAMDBS production**. If your email address is different, please update you email address in https://camd.epa.gov/CBS/login/auth before you register.
3. Ensure you have **appropriate access in CAMDBS production** (https://camd.epa.gov/CBS/login/auth) i.e., a preparer for units assigned by your DR or ADR.
4. Please notify everyone in your network to update their email address to the latest in CAMDBS production (https://camd.epa.gov/CBS/login/auth).
5. If you are a consultant and not an agent in the current CBS, you will need to work with the DR, ADR, or EPA staff to get you assigned as an agent to the appropriate plants.

Setting up CDX Organization, CDX Roles, and CBS/ECMPS Responsibilities

New Organization in CDX:

If you and your group are new to CDX, the DR of a plant will need to request access for a role called "Initial Authorizer." This role is essentially the same as the Sponsor role but will kick-start the process of getting a group/organization started in CDX. For Beta purposes, you can create a "John/Jane Doe" account to act as the DR if your DR does not want to participate in Beta. Follow Becoming an Initial Authorizer for more.

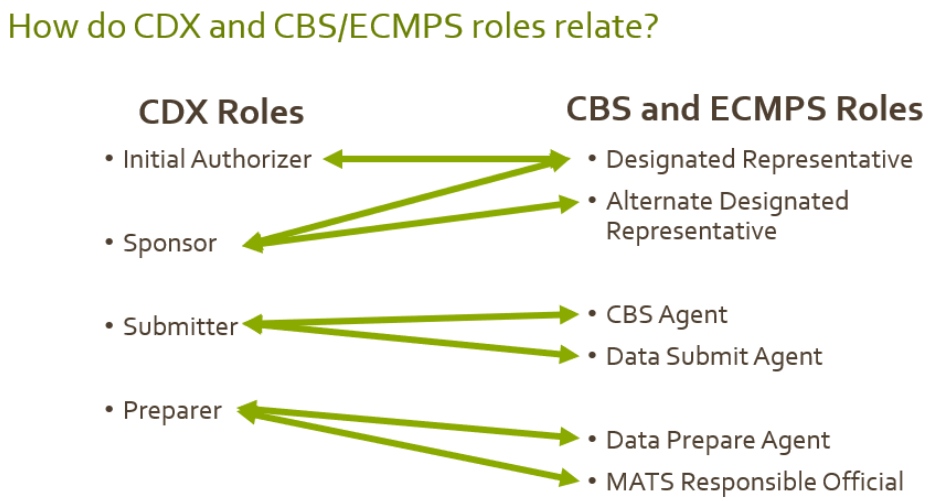
The Sponsor/Initial Authorizer Role and Pre-registering:

Sponsors and Initial Authorizer are similar as they can both sponsor other sponsors, preparers, and submitters. They can do this through a pre-registration process. Follow The Sponsor/Initial Authorizer Role and Pre-registering Another User for more.

Account Set Up Not Using the Pre-registration Process:

Sponsors, preparers, and submitters can also set up their account not using the pre-registration process; however, you still need to be sponsored by a Sponsor or an Initial Authorizer. We recommend the pre-registration process. Follow Creating an Account Not Using Pre-registration for more.

The image below describes the CDX roles and the relationship with CBS/ECMPS roles.



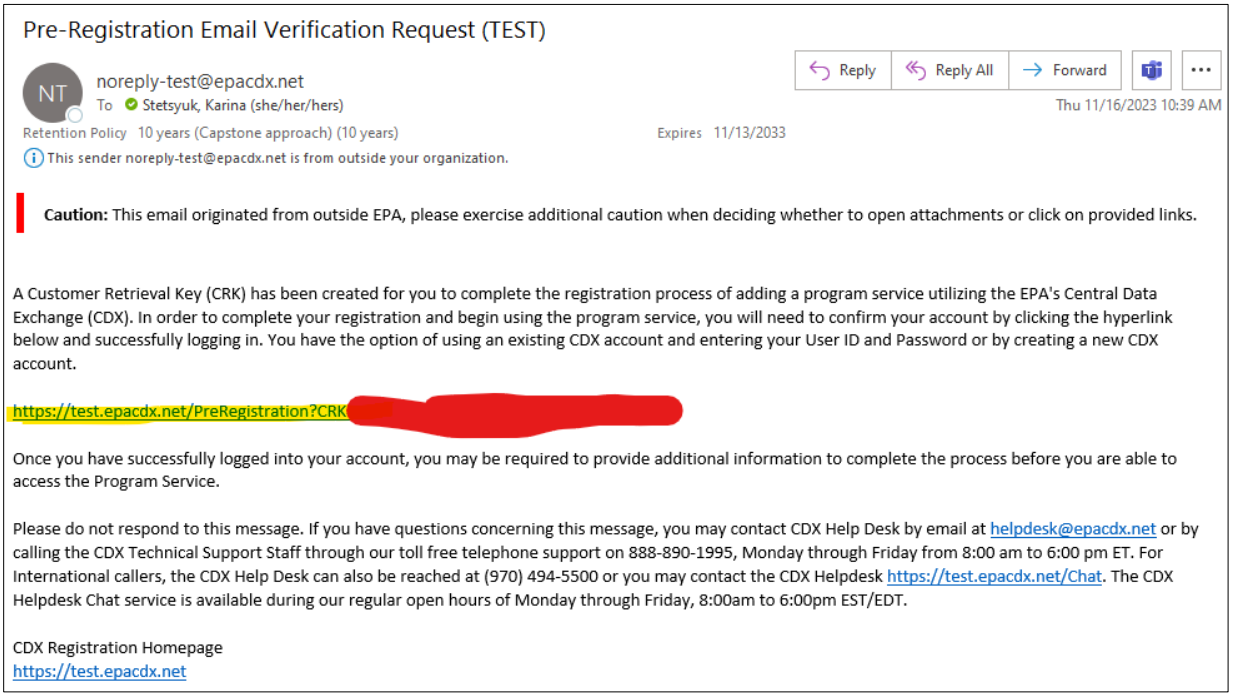
Becoming an Initial Authorizer

Step 1: Email cbs-testing@camdsupport.com to Request the CDX Role

To get registered with the "Initial Authorizer" CDX role, you will need to send an email to cbs-testing@camdsupport.com with your first name, last name, and email with subject line "EASEY Beta – Requesting Initial Authorizer Role in CDX Test".

Step 2: Starting the Registration Process

In the email you provided, you will get an email like below. Click on the link to start the registration process.



Pre-Registration Email Verification Request (TEST)

NT noreply-test@epacdx.net
To Stetsyuk, Karina (she/her/hers)

Reply | Reply All | Forward

Thu 11/16/2023 10:39 AM

Retention Policy 10 years (Capstone approach) (10 years) Expires 11/13/2033

This sender noreply-test@epacdx.net is from outside your organization.

Caution: This email originated from outside EPA, please exercise additional caution when deciding whether to open attachments or click on provided links.

A Customer Retrieval Key (CRK) has been created for you to complete the registration process of adding a program service utilizing the EPA's Central Data Exchange (CDX). In order to complete your registration and begin using the program service, you will need to confirm your account by clicking the hyperlink below and successfully logging in. You have the option of using an existing CDX account and entering your User ID and Password or by creating a new CDX account.

https://test.epacdx.net/PreRegistration?CRK[redacted]

Once you have successfully logged into your account, you may be required to provide additional information to complete the process before you are able to access the Program Service.

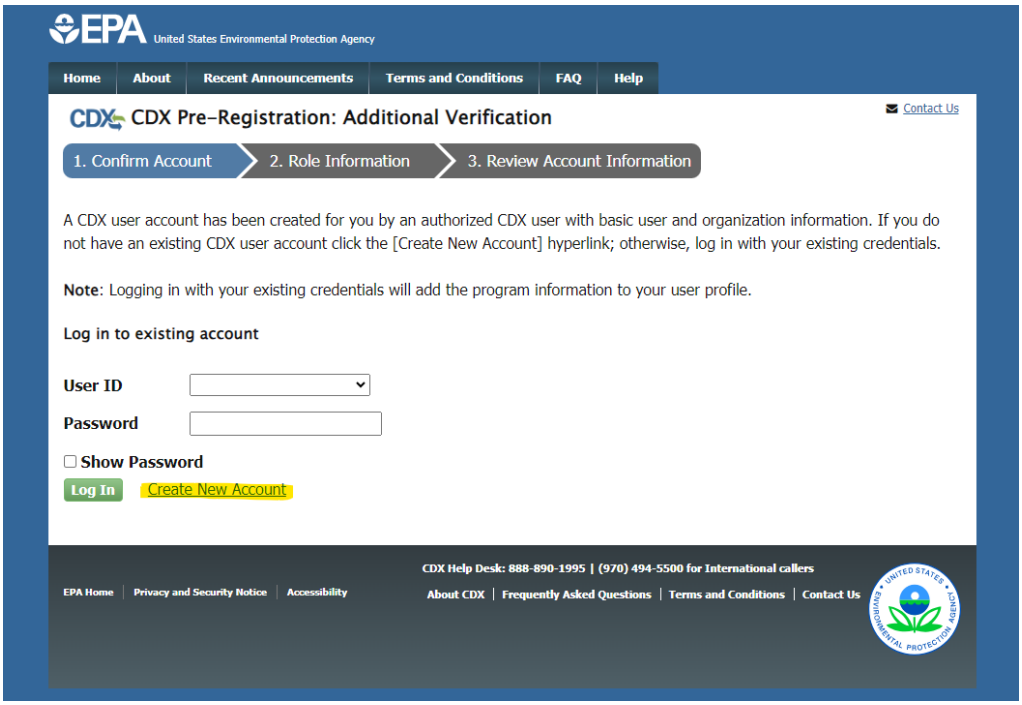
Please do not respond to this message. If you have questions concerning this message, you may contact CDX Help Desk by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995, Monday through Friday from 8:00 am to 6:00 pm ET. For International callers, the CDX Help Desk can also be reached at (970) 494-5500 or you may contact the CDX Helpdesk https://test.epacdx.net/Chat. The CDX Helpdesk Chat service is available during our regular open hours of Monday through Friday, 8:00am to 6:00pm EST/EDT.

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

Step 3: Create a CDX New Account

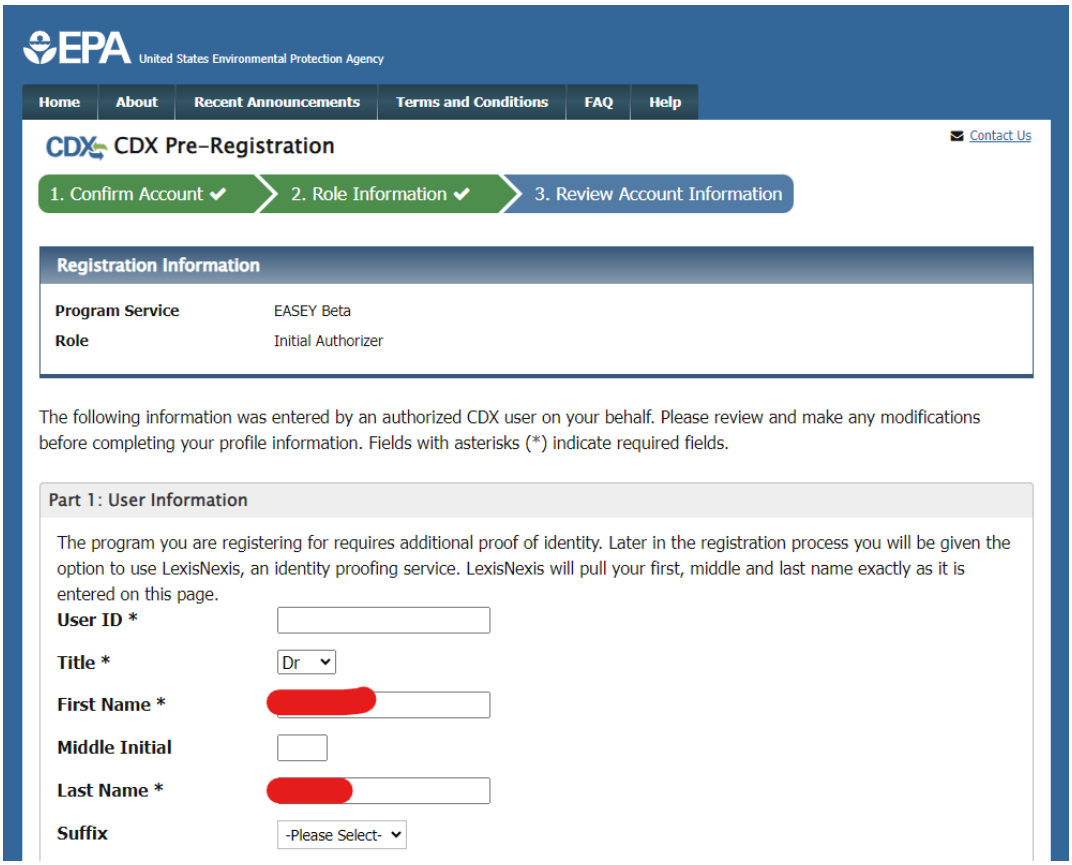
Click on "Create New Account".

Note: if you have a current CBS account **and the email registered for that account is the same as in CBS production**, as you can log in and use that existing account. **However, if you're creating a "John/Jane Doe" account, then create a new CDX account.**



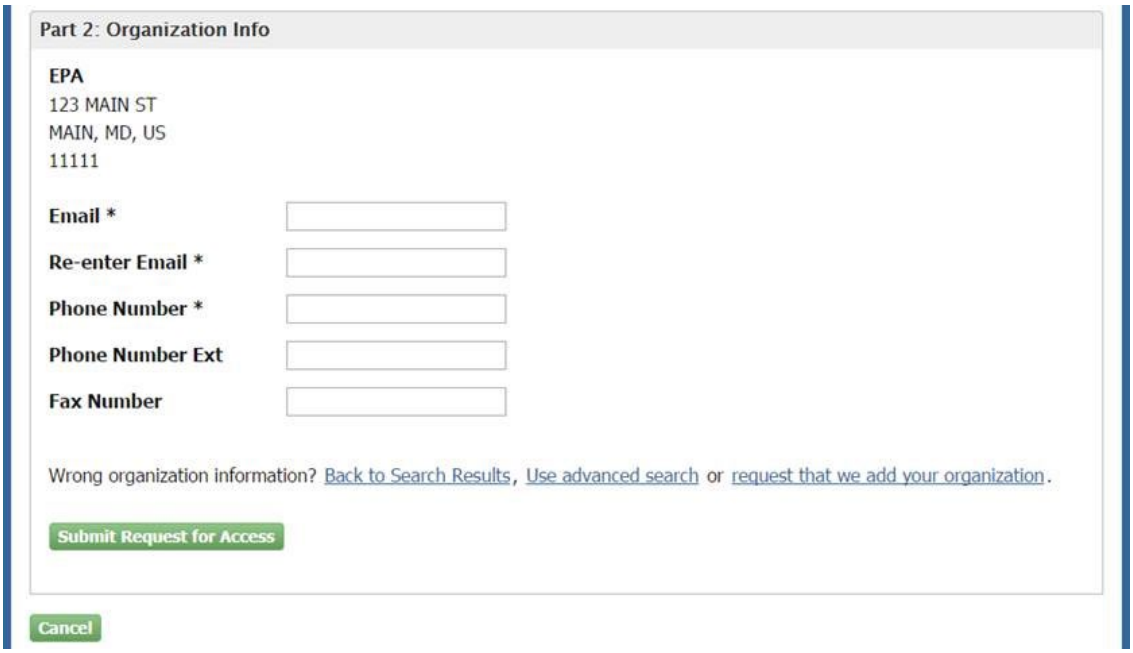
Step 4: Provide User Information

Enter a unique username, fill out the personal information, create a password, and answer three security questions.



Step 5: Provide Organization Information

Create a new organization and **keep track of the organization ID**. Additionally **use the same email that you use in CBS production to avoid complications**.



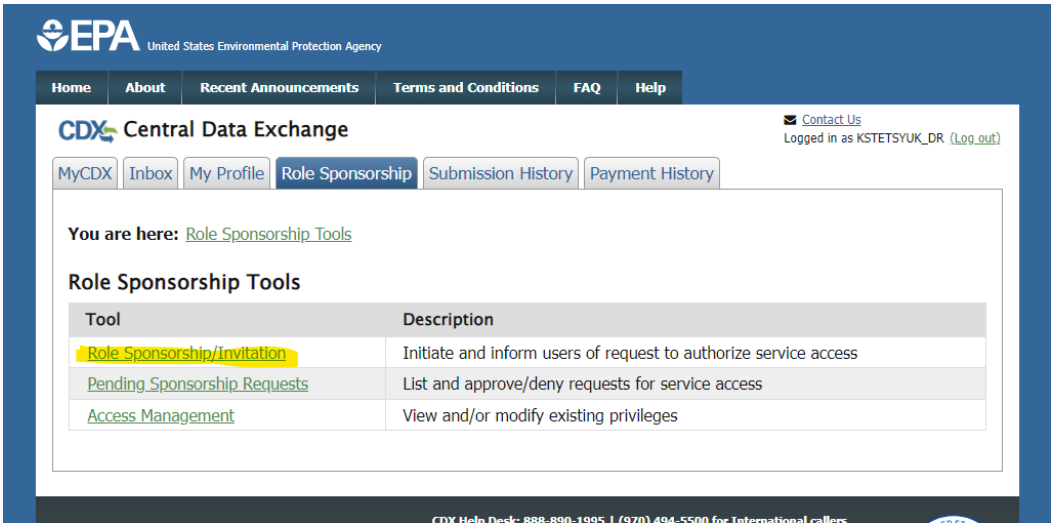
Step 6: Follow Lexis Nexis and Remaining Steps

Follow steps 12, 13, 14, and 15 in the Creating an Account Not Using Pre-registration section.

The Sponsor/Initial Authorizer Role and Pre-registering Another User

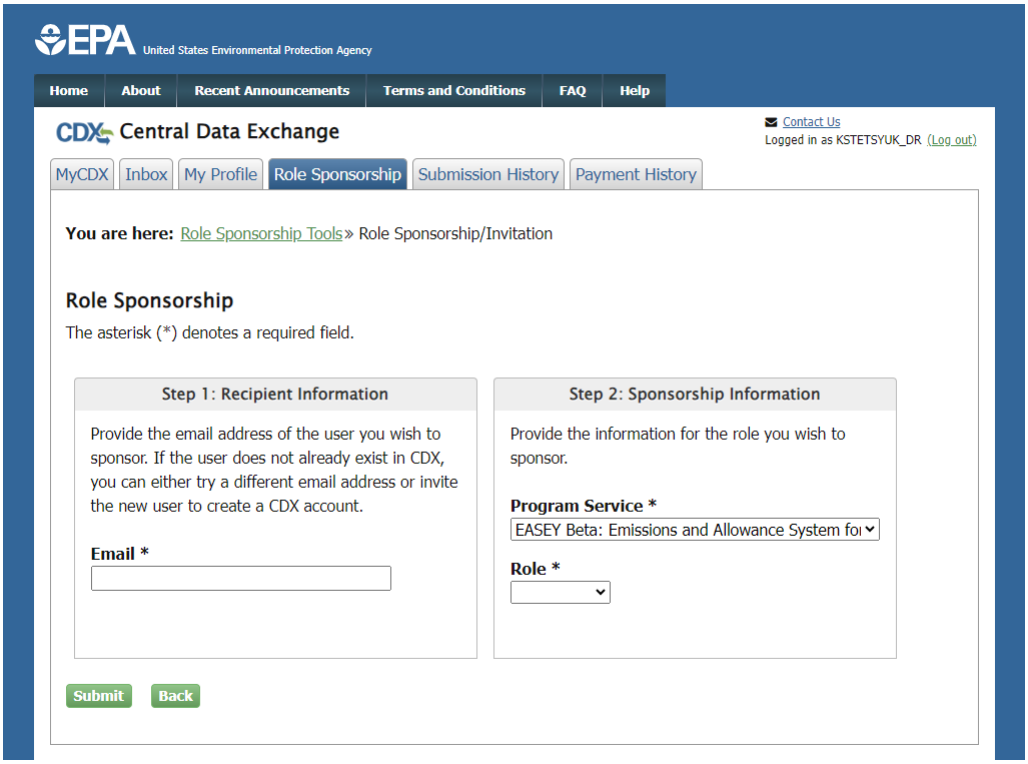
Step 1: Start Role Sponsorship

As a Sponsor or Initial Authorizer, you will have a "Role Sponsorship" tab on your CDX account. Click on "Role Sponsorship/Invitation."



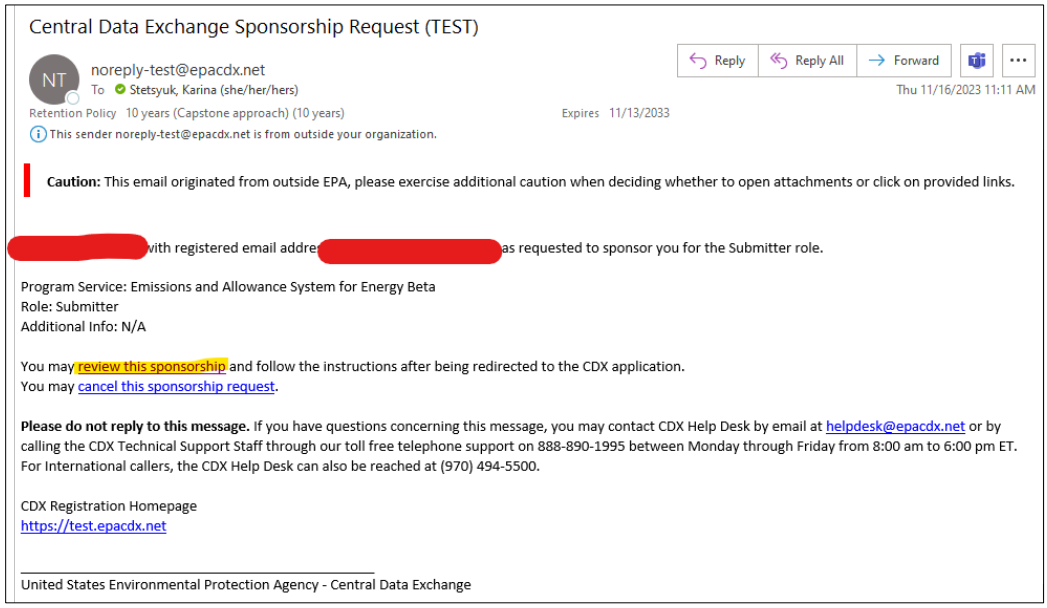
Step 2: Provide an Email and Role

Provide the email of who you want to sponsor. **Make sure they are using the same email they use in production CBS.**



Step 3: Have the Sponsored Person Accept the Request

The sponsored person will need to click on “review this sponsorship” when they receive a notification in their email.



Central Data Exchange Sponsorship Request (TEST)

NT noreply-test@epacdx.net
To Stetsyuk, Karina (she/her/hers)

Reply | Reply All | Forward

Thu 11/16/2023 11:11 AM

Retention Policy 10 years (Capstone approach) (10 years) Expires 11/13/2033

This sender noreply-test@epacdx.net is from outside your organization.

Caution: This email originated from outside EPA, please exercise additional caution when deciding whether to open attachments or click on provided links.

[redacted] with registered email addre[redacted] as requested to sponsor you for the Submitter role.

Program Service: Emissions and Allowance System for Energy Beta
Role: Submitter
Additional Info: N/A

You may review this sponsorship and follow the instructions after being redirected to the CDX application.
You may cancel this sponsorship request.

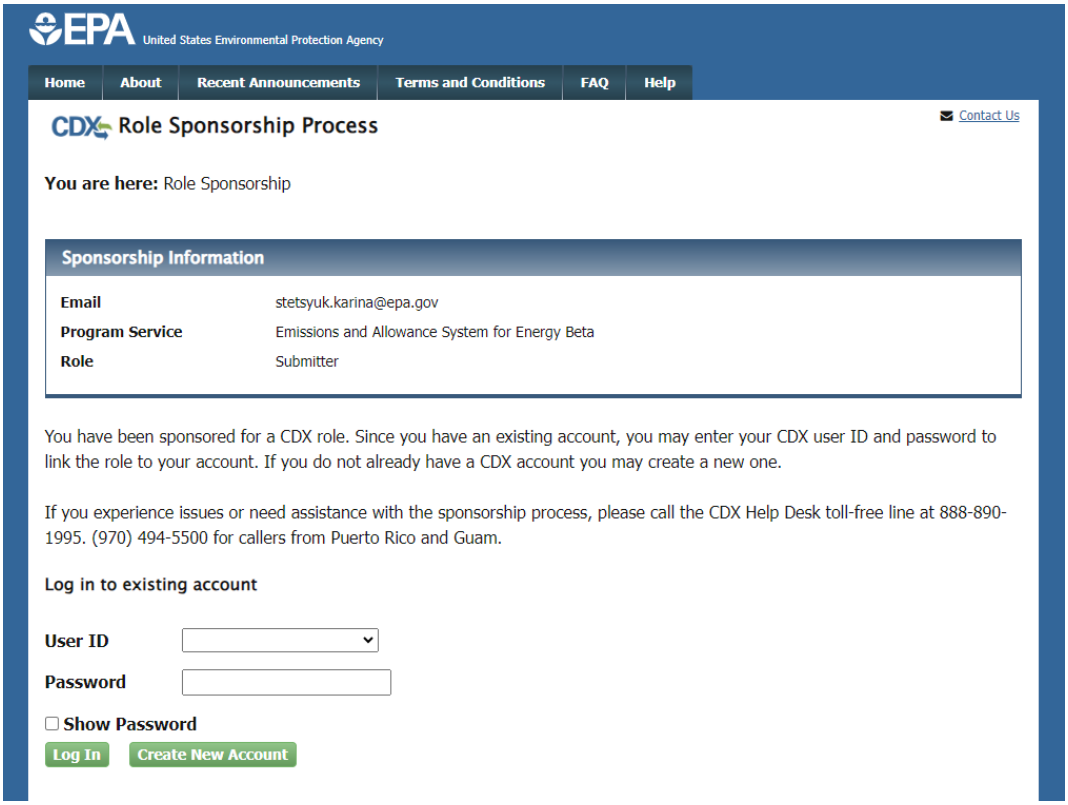
Please do not reply to this message. If you have questions concerning this message, you may contact CDX Help Desk by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our toll free telephone support on 888-890-1995 between Monday through Friday from 8:00 am to 6:00 pm ET. For International callers, the CDX Help Desk can also be reached at (970) 494-5500.

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

United States Environmental Protection Agency - Central Data Exchange

Step 4: The Sponsored Person Creates and New Account or Adds to an Existing Account

If you have an existing account registered with the same email in CBS production, you can log in and accept the invitation. If not click on “Create New Account.”



EPA United States Environmental Protection Agency

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Contact Us

CDX Role Sponsorship Process

You are here: Role Sponsorship

Sponsorship Information

Email	stetsyuk.karina@epa.gov
Program Service	Emissions and Allowance System for Energy Beta
Role	Submitter

You have been sponsored for a CDX role. Since you have an existing account, you may enter your CDX user ID and password to link the role to your account. If you do not already have a CDX account you may create a new one.

If you experience issues or need assistance with the sponsorship process, please call the CDX Help Desk toll-free line at 888-890-1995. (970) 494-5500 for callers from Puerto Rico and Guam.

Log in to existing account

User ID

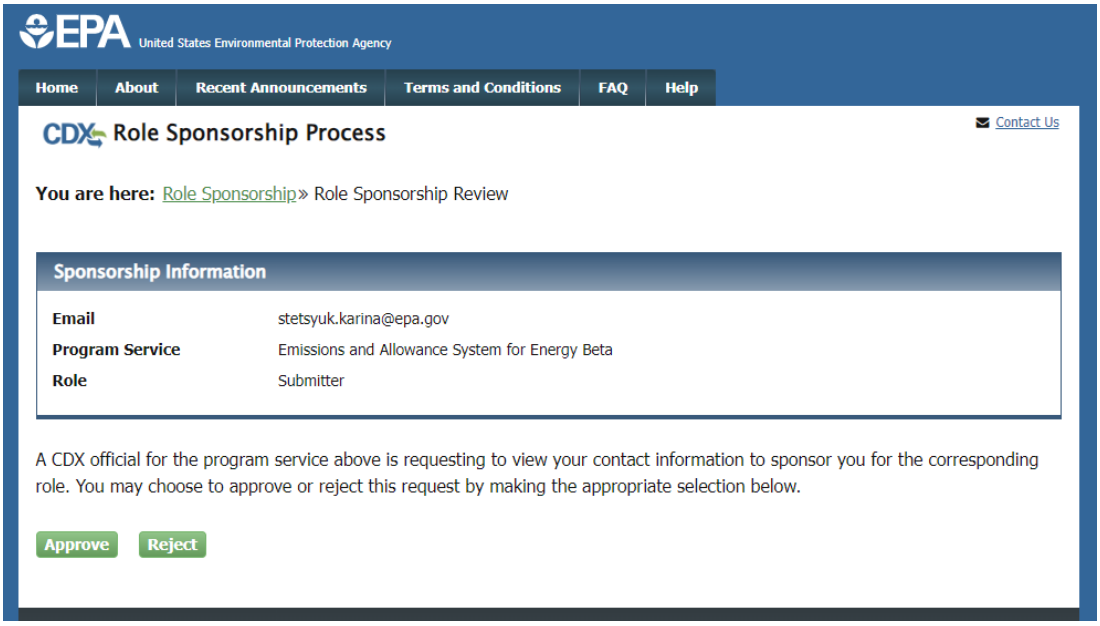
Password

Show Password

Log In | Create New Account

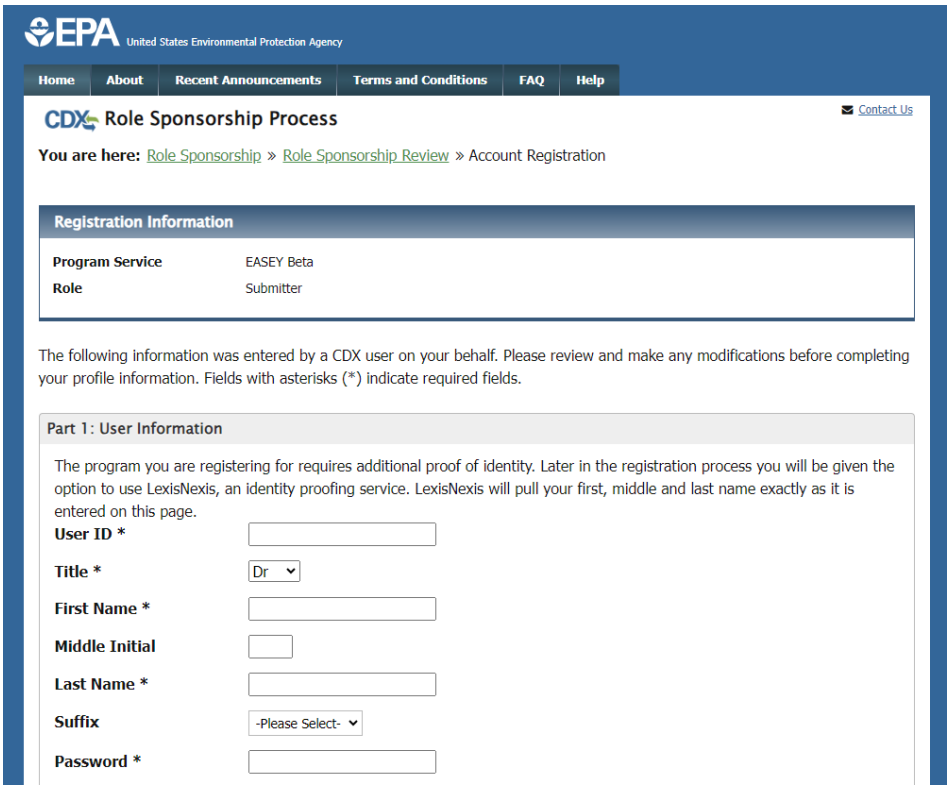
Step 5: Accept the Role

Accept the role.



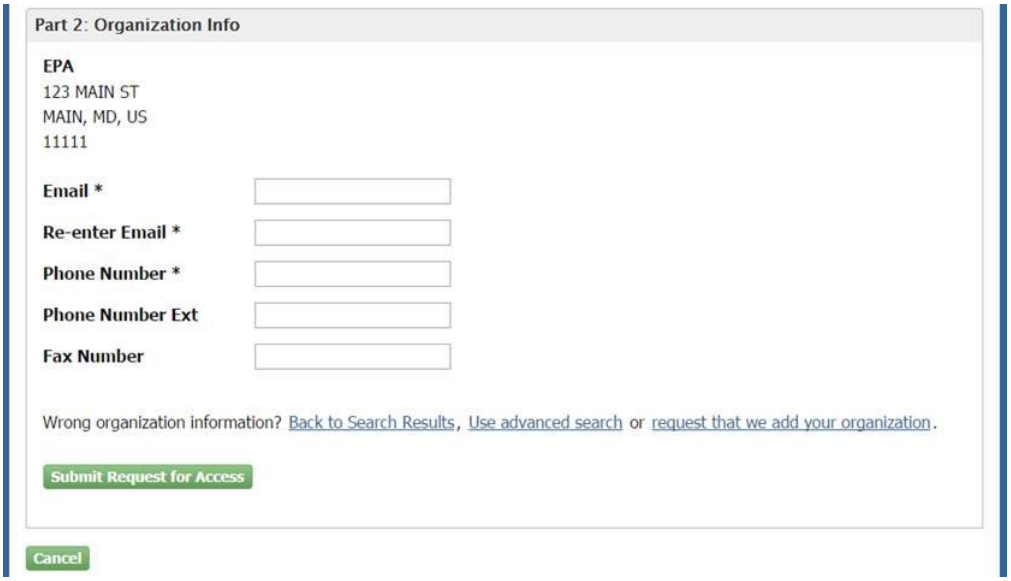
Step 6: Provide User Information

Enter a unique username, fill out the personal information, create a password, and answer three security questions.



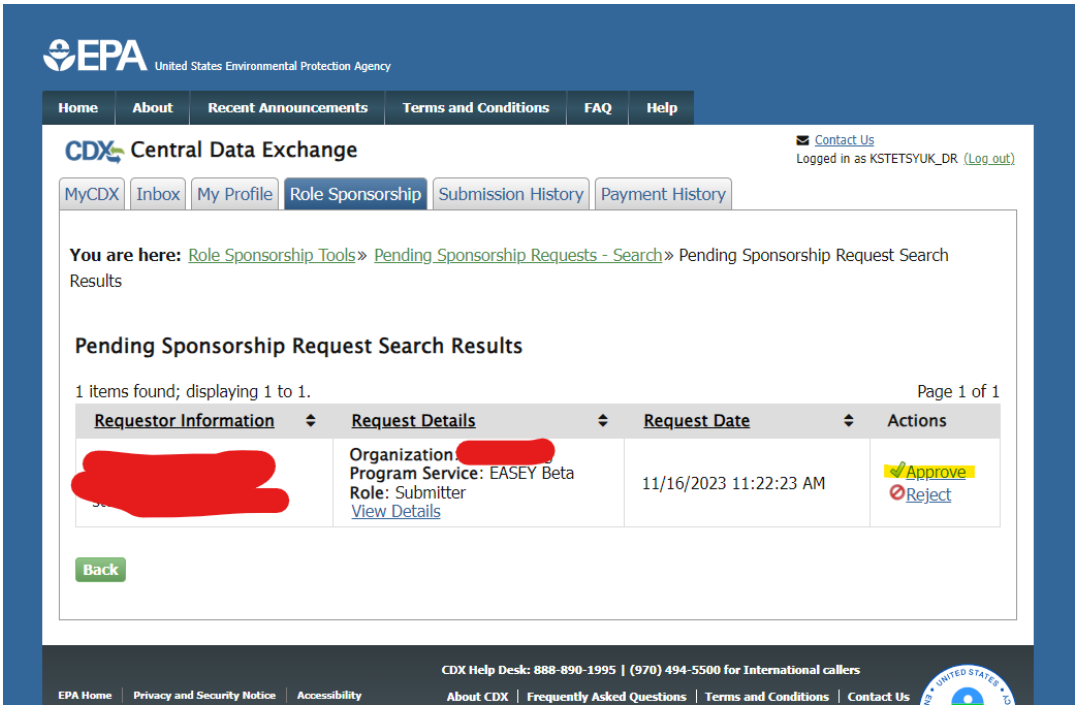
Step 7: Provide Organization Information

Search for your Sponsors/Initial Authorizer's organization (**please search by organization ID – the search on CDX is not the best**). Additionally **use the same email that you use in CBS production to avoid complications**.



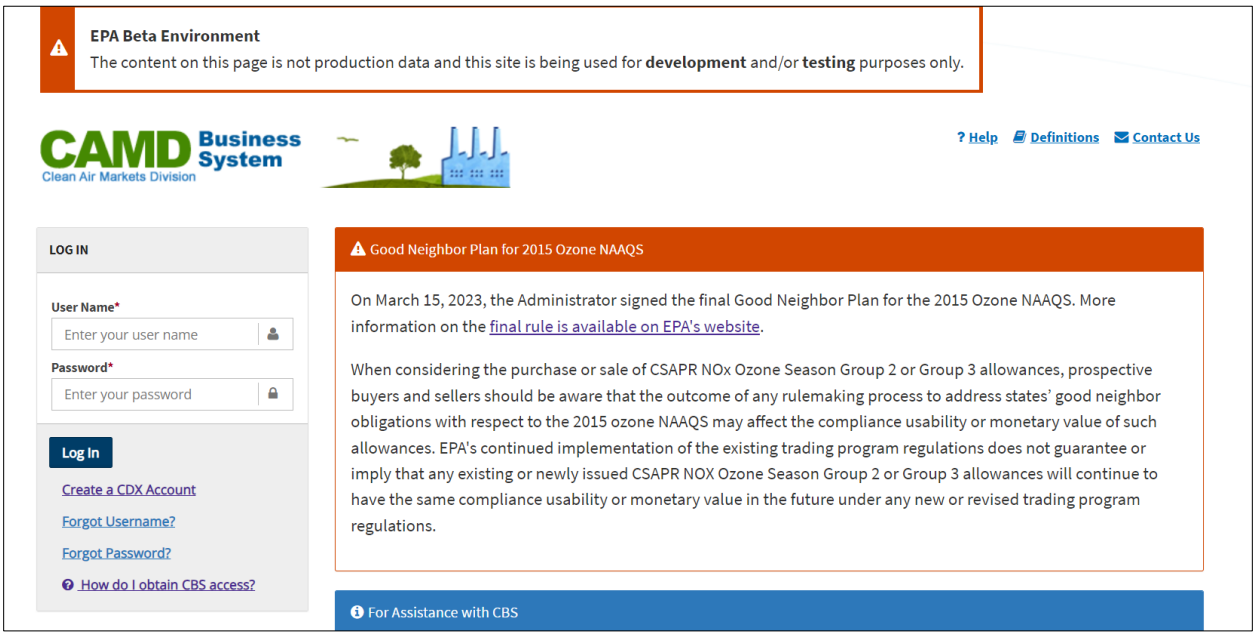
Step 8: Have the Sponsor Finalize the Request

The Sponsor will need to log on and click on the "Pending Sponsorship Requests" in the Role Sponsor tab. From there they can search and find open requests to approve.



Step 9: Log into https://cbsprodbeta.epa.gov/CBS to Link your CDX Test Account

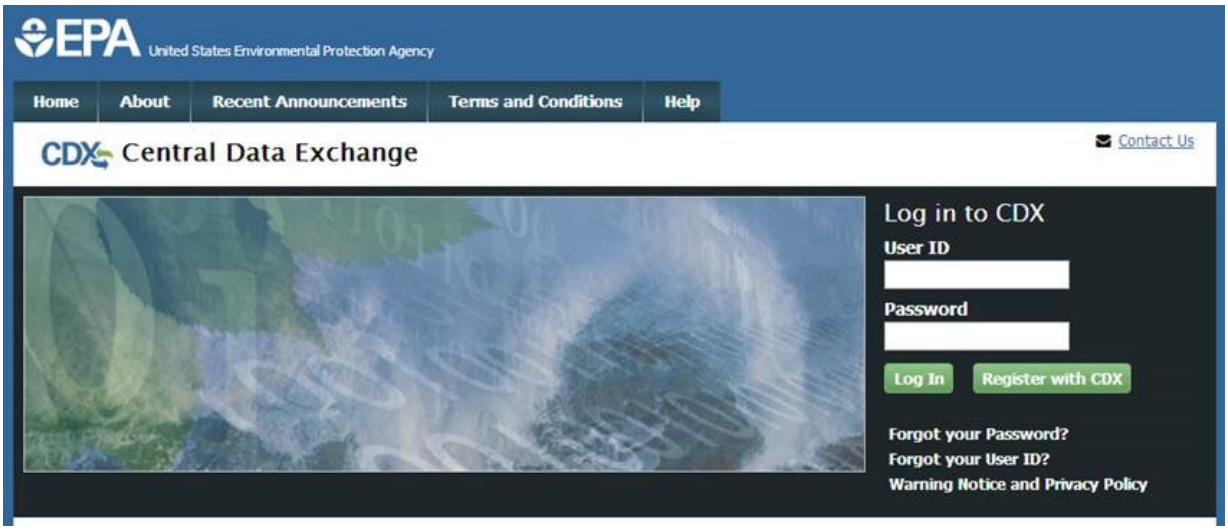
The sponsored person should log into CBS Beta to properly link their CDX Test account in our system. You may need to wait a few minutes after you register in CDX to try logging into CBS Beta. Make sure you have the appropriate access to the plants that you access to in production. If you do not see the plants that you are responsible for, please send an email to cbs-testing@camdsupport.com.



Creating an Account Not Using Pre-registration

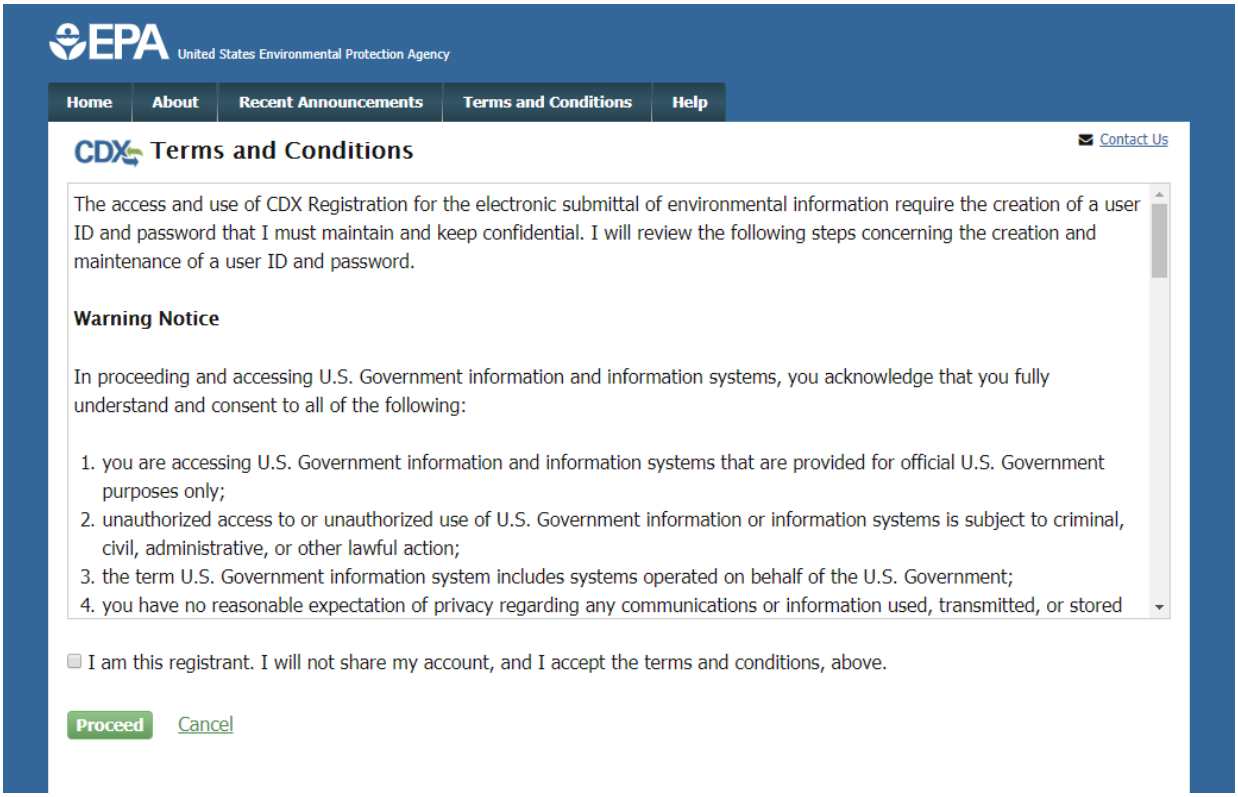
Step 1: Go to https://test.epacdx.net/ and Register

On the CDX test homepage click the “Register with CDX” button to start the registration process.



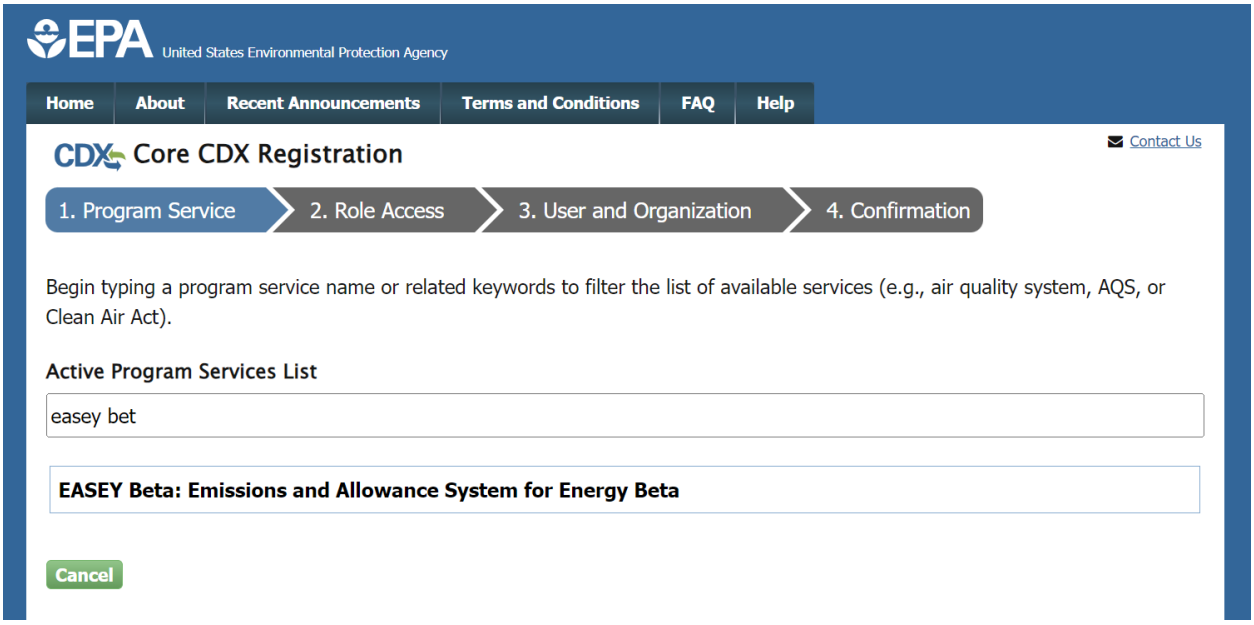
Step 2: Accept Terms and Conditions

By accepting the terms and conditions you agree to abide by the system requirements and the system will allow you to access CDX.



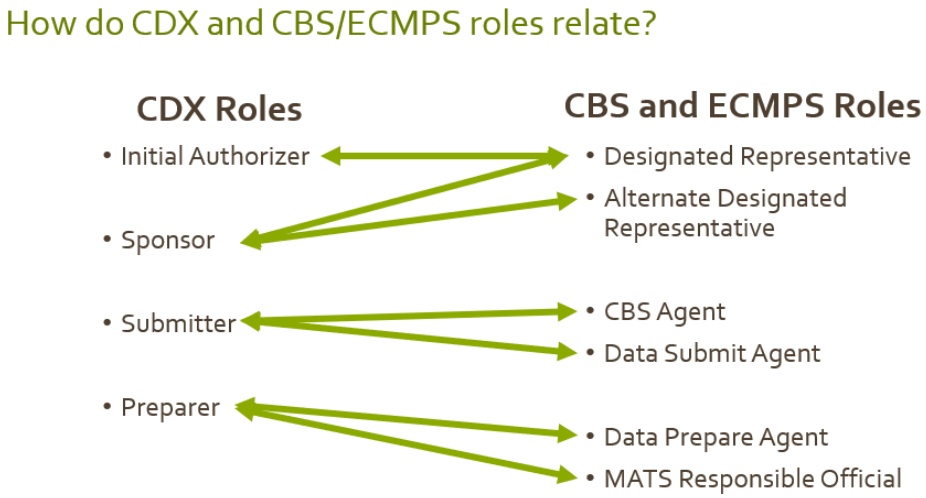
Step 3: Select a Program Service – EASEY Beta

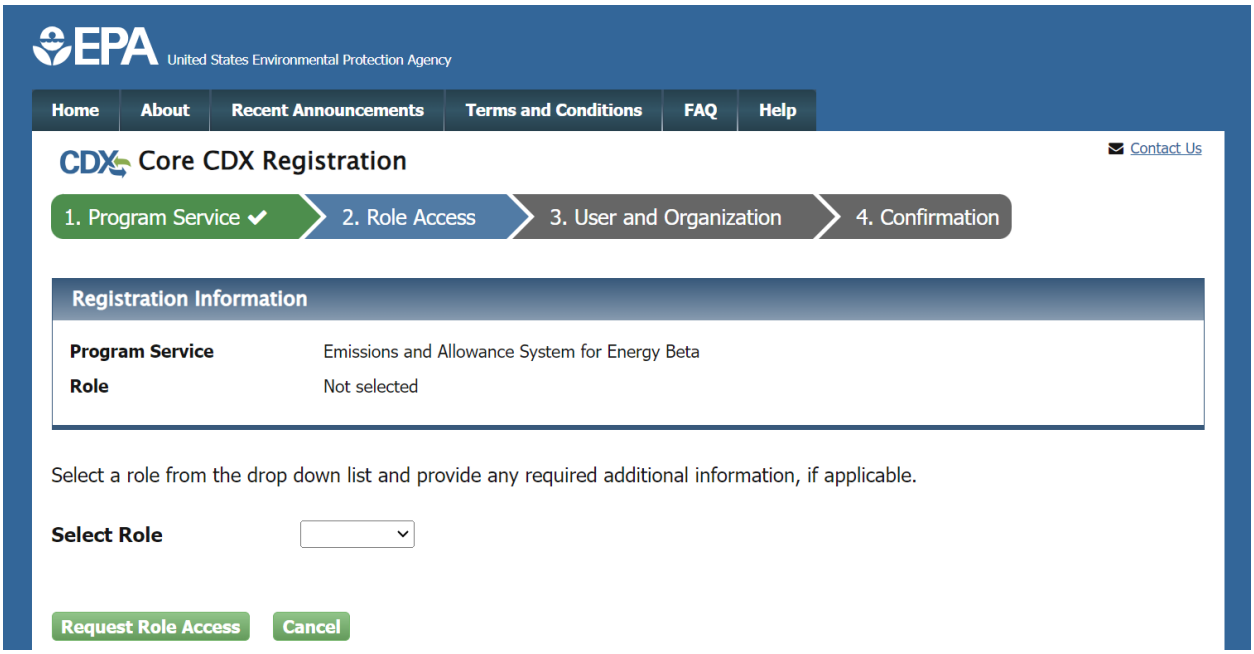
To select a program service, type the flow name or descriptor to filter the results or select from the full list. Type and select EASEY Beta.



Step 4: Provide Role and Additional Information

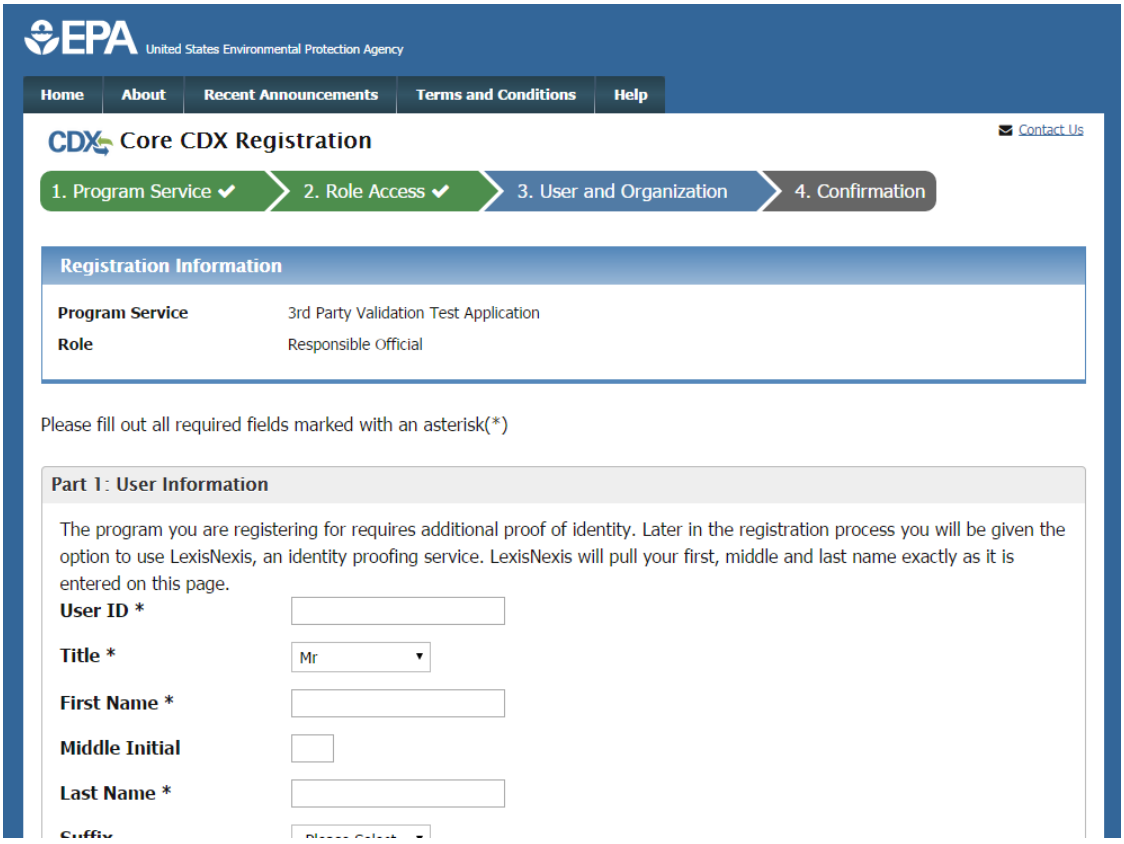
Select the role that is appropriate to you. Use this chart.





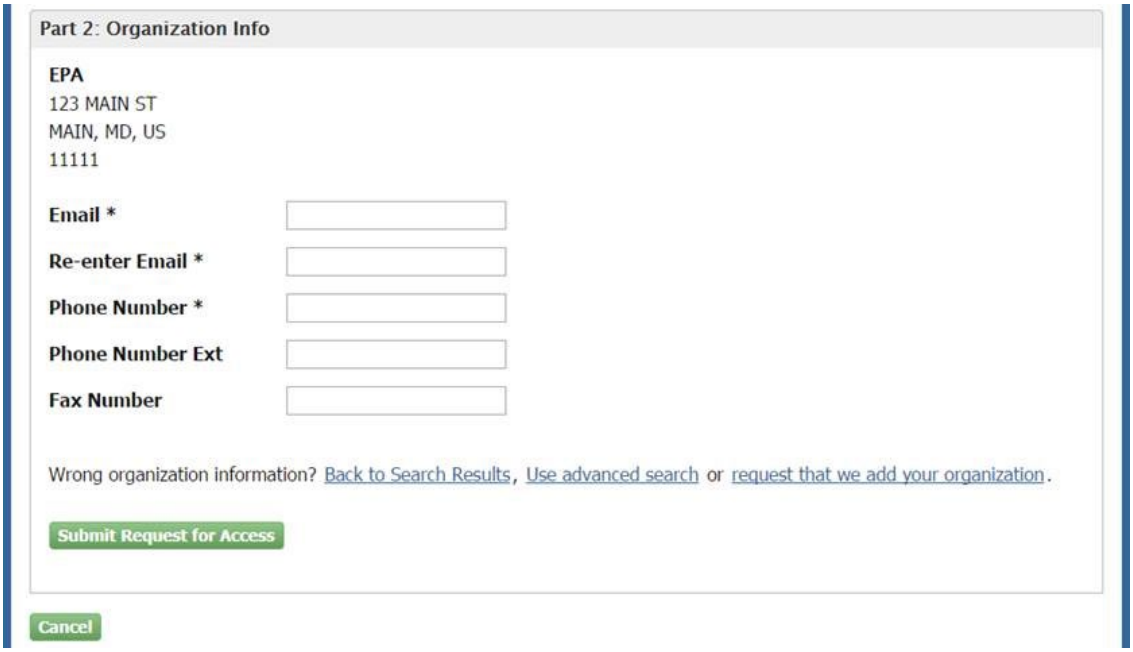
Step 5: Provide User Information

Enter a unique username, fill out the personal information, create a password, and answer three security questions.



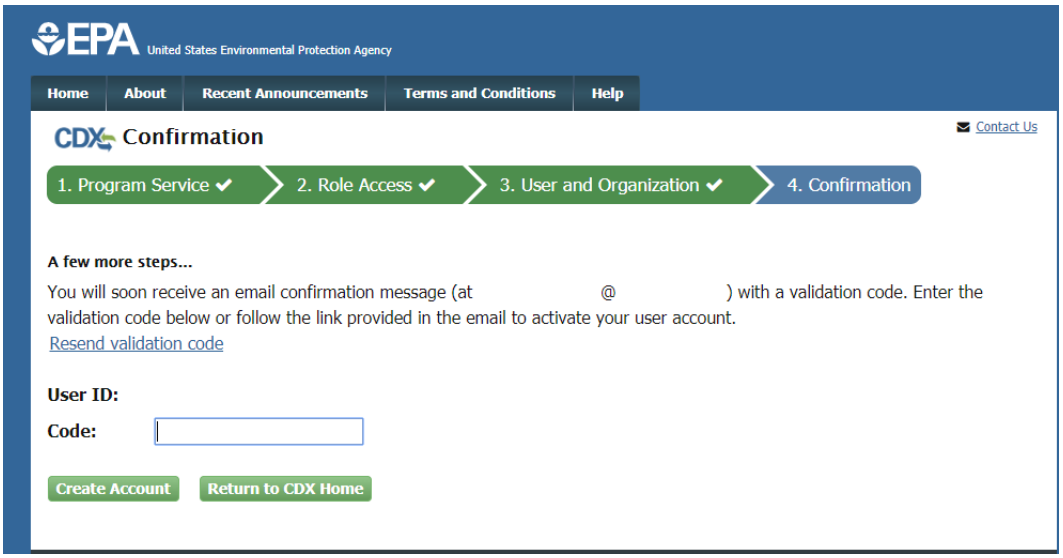
Step 6: Provide Organization Information

Search for an existing organization (**please search by organization ID – the search on CDX is not the best**). If a matching organization is not found, create a new organization and **keep track of the organization ID**. Additionally **use the same email that you use in CBS production to avoid complications**.



Step 7: Confirmation screen and activation link

After all core registration information has been provided, the confirmation screen displays. An account activation code will be sent to the organization email address provided. Either follow the account activation link instructions or copy/paste the code into the confirmation screen "Code" box to complete registration.

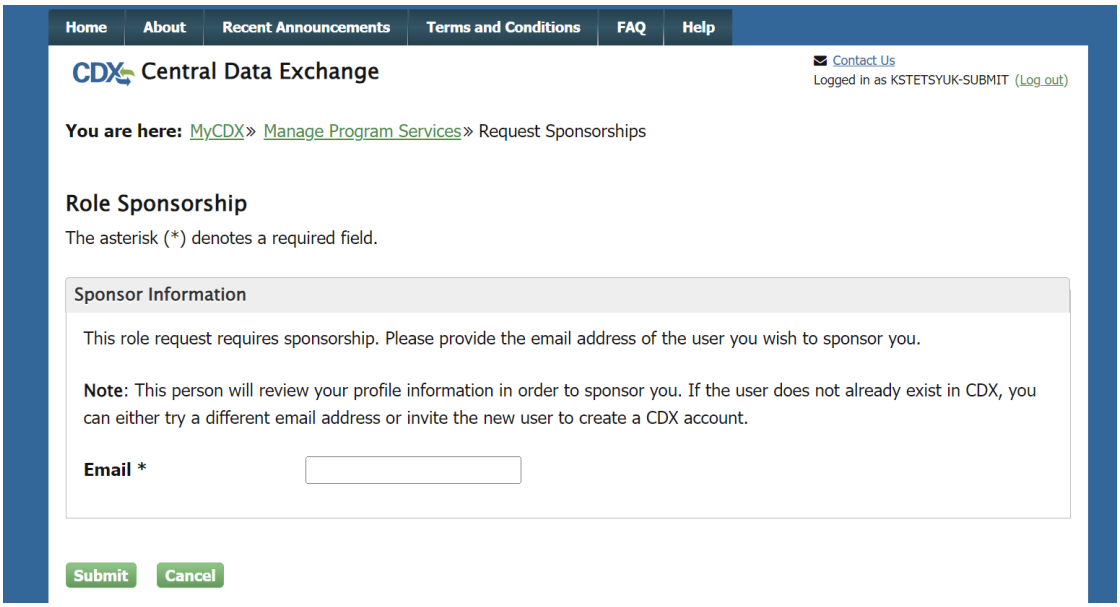


Step 8: Complete Registration and Additional Validation

Log in to CDX with credentials provided during registration after clicking the account activation link in the confirmation email.

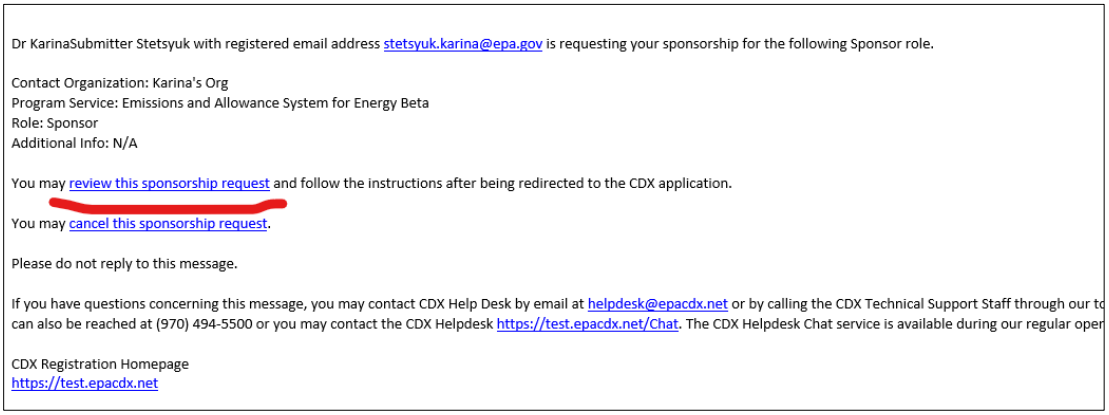
Step 9: Provide a Sponsor's Email

Someone in your organization with the "Initial Authorizer" or "Sponsor" role will need to sponsor you. Provide their organization email address here.



Step 10: Sponsorship Process (done by the sponsor)

The sponsor will get an email and will need to click "review this sponsorship request" to approve.



Dr KarinaSubmitter Stetsyuk with registered email address stetsyuk.karina@epa.gov is requesting your sponsorship for the following Sponsor role.

Contact Organization: Karina's Org
Program Service: Emissions and Allowance System for Energy Beta
Role: Sponsor
Additional Info: N/A

You may review this sponsorship request and follow the instructions after being redirected to the CDX application.

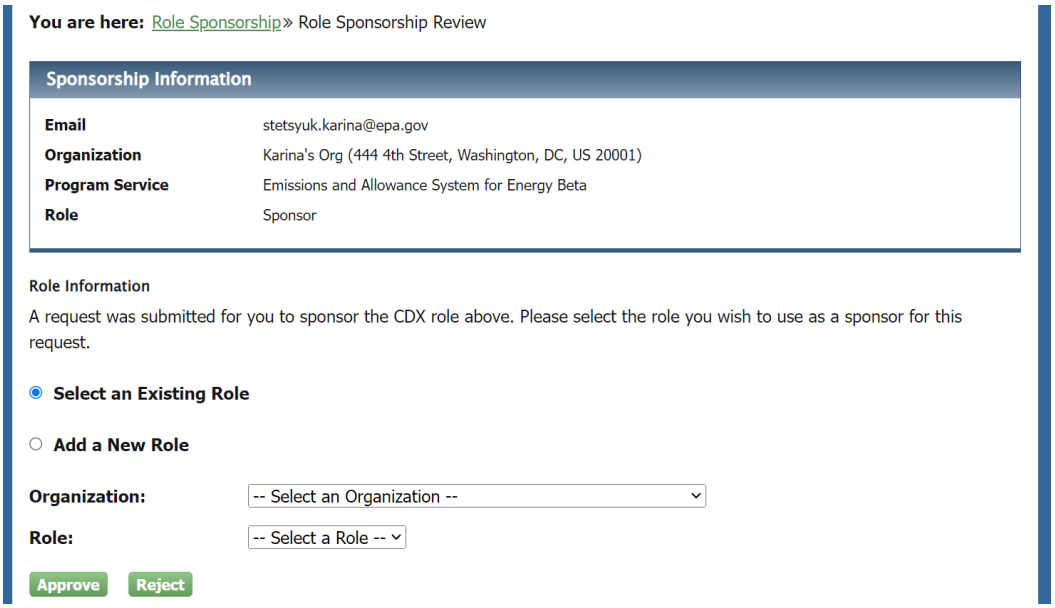
You may cancel this sponsorship request.

Please do not reply to this message.

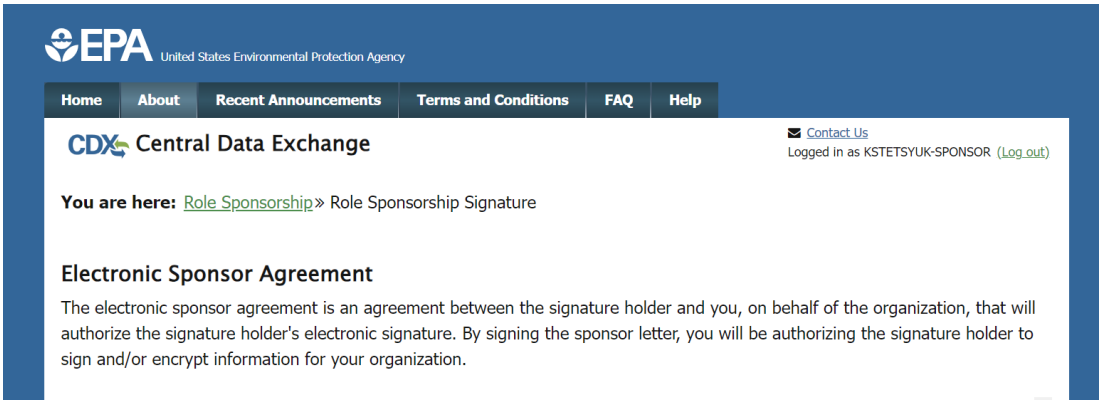
If you have questions concerning this message, you may contact CDX Help Desk by email at helpdesk@epacdx.net or by calling the CDX Technical Support Staff through our to
can also be reached at (970) 494-5500 or you may contact the CDX Helpdesk https://test.epacdx.net/Chat. The CDX Helpdesk Chat service is available during our regular oper

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

They will arrive at the "Role Sponsorship Review" page after logging in and will need to follow the steps to approve.

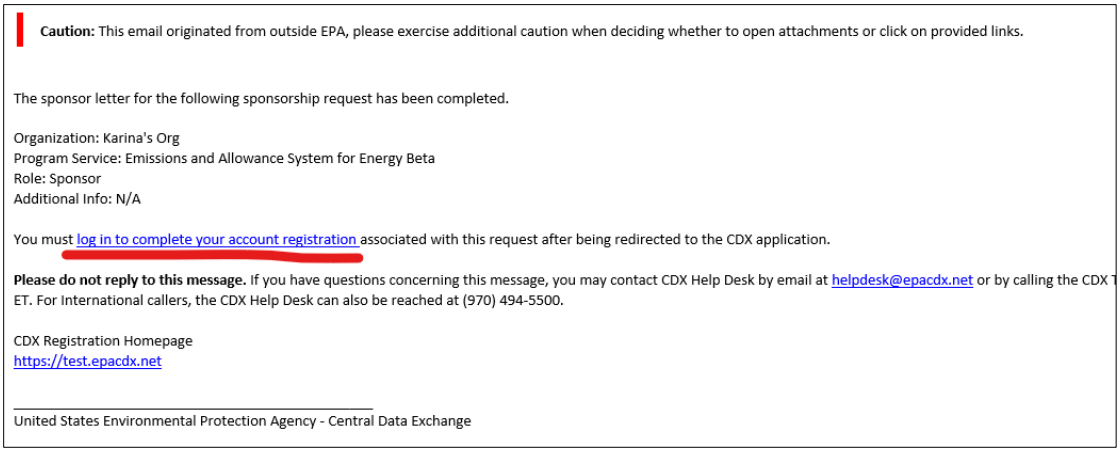


They will need to sign the Sponsor Agreement (you may have to click “sign” twice).



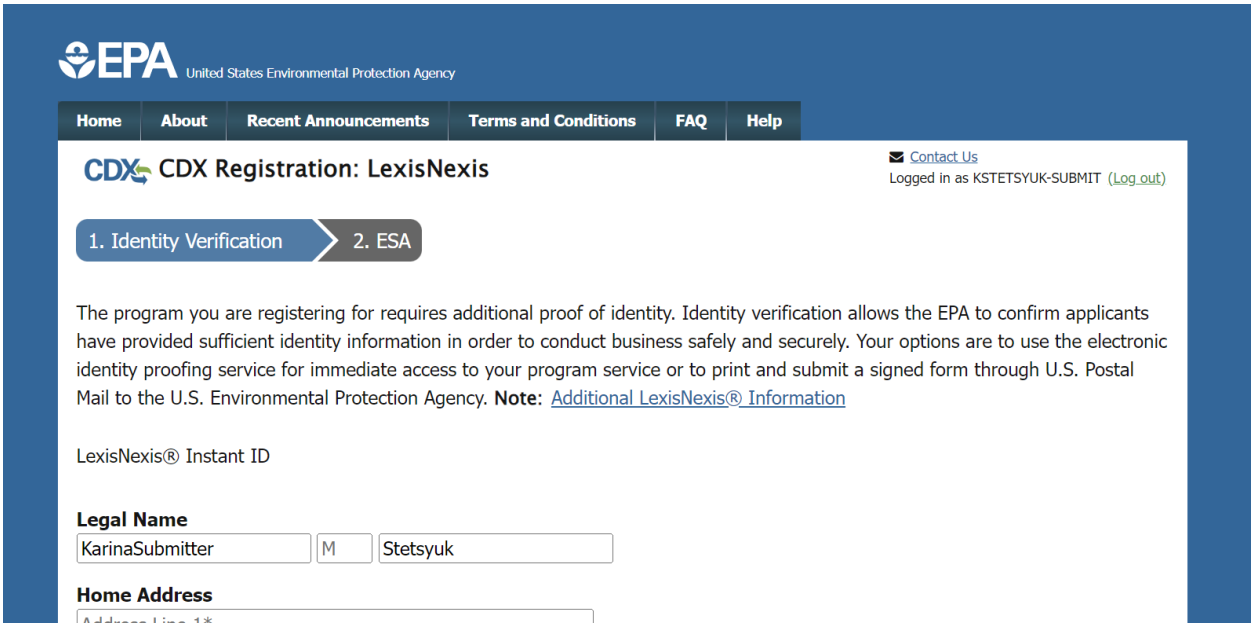
Step 11: Complete Account Registration

Click the link in the email that you receive once the sponsorship process is complete.



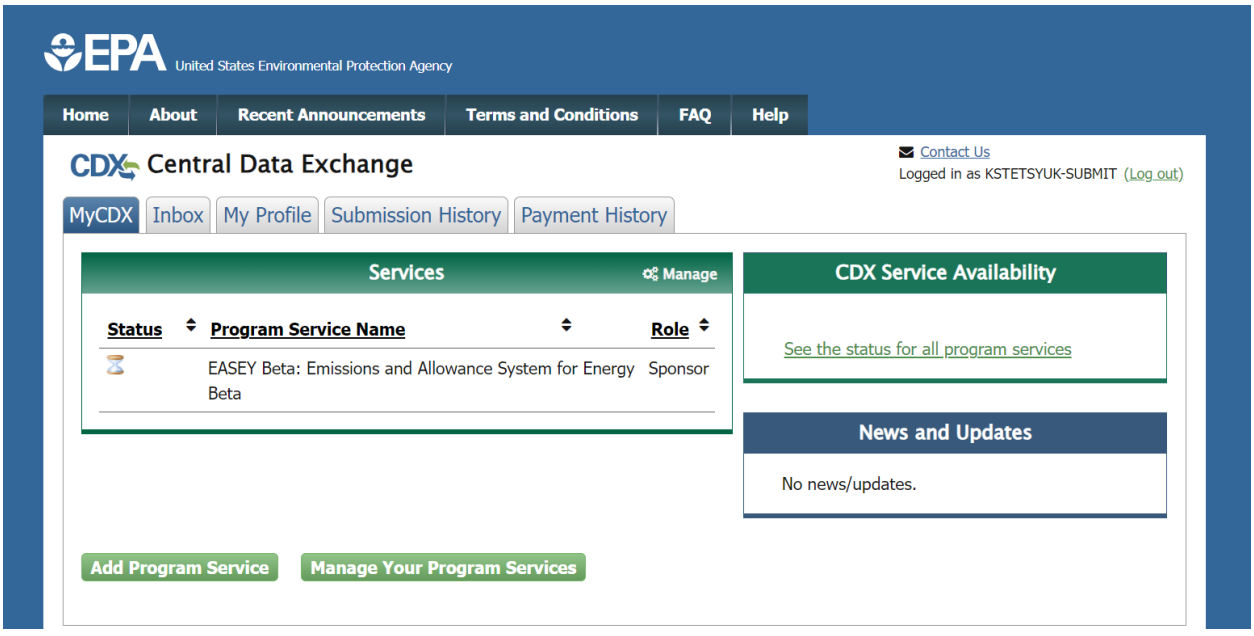
Step 12: Complete LexisNexis or ESA

Proceed through LexisNexis. If you choose to use incorrect information (we suggest) you'll be brought to and ESA which is supposed to be signed and mailed. **You don't need to do this but will need to be done in production (the actual live application) if you fail the LexisNexis process.**



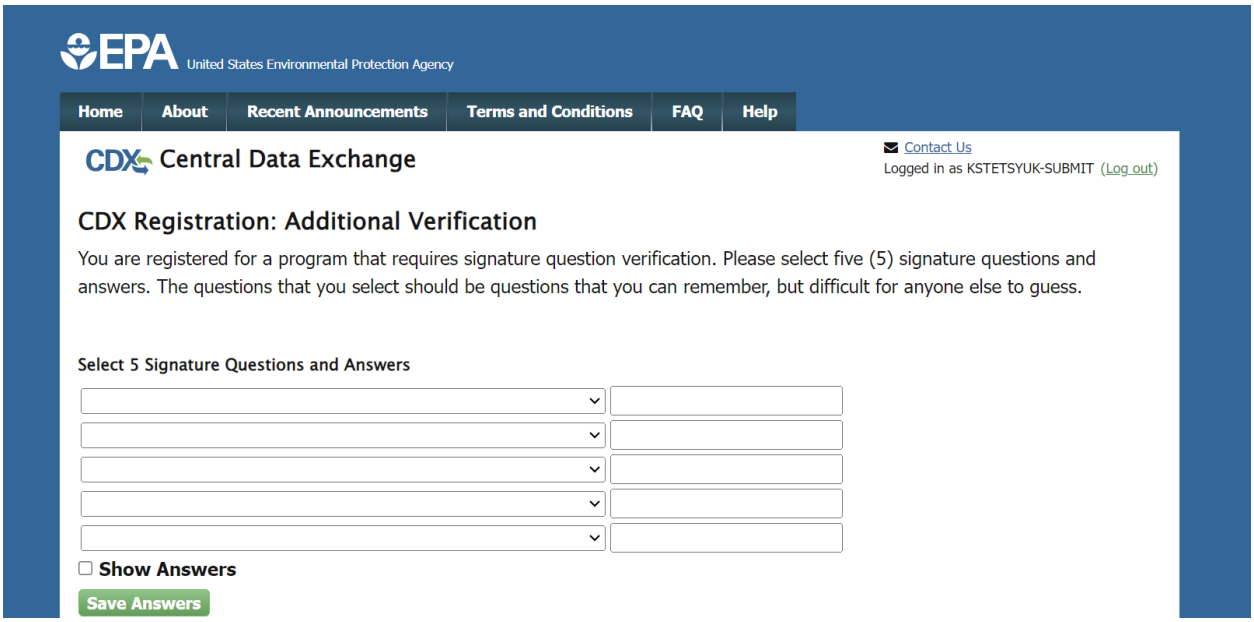
Step 13: Email CAMD to Approve Pending Status if LexisNexis Failed

From this point you will have a pending role status. Send an email to cbs-testing@camdsupport.com with your first name, last name, email and CDX username with subject line "EASEY Beta - Awaiting Approval in CDX Test".



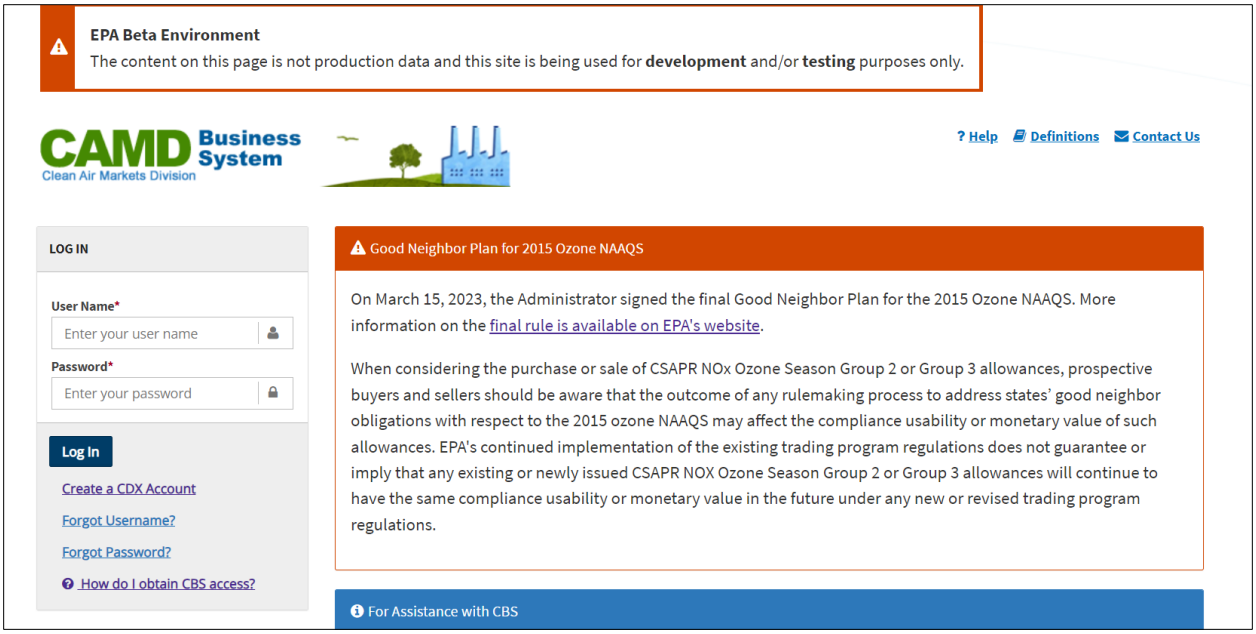
Step 14: Signature Questions

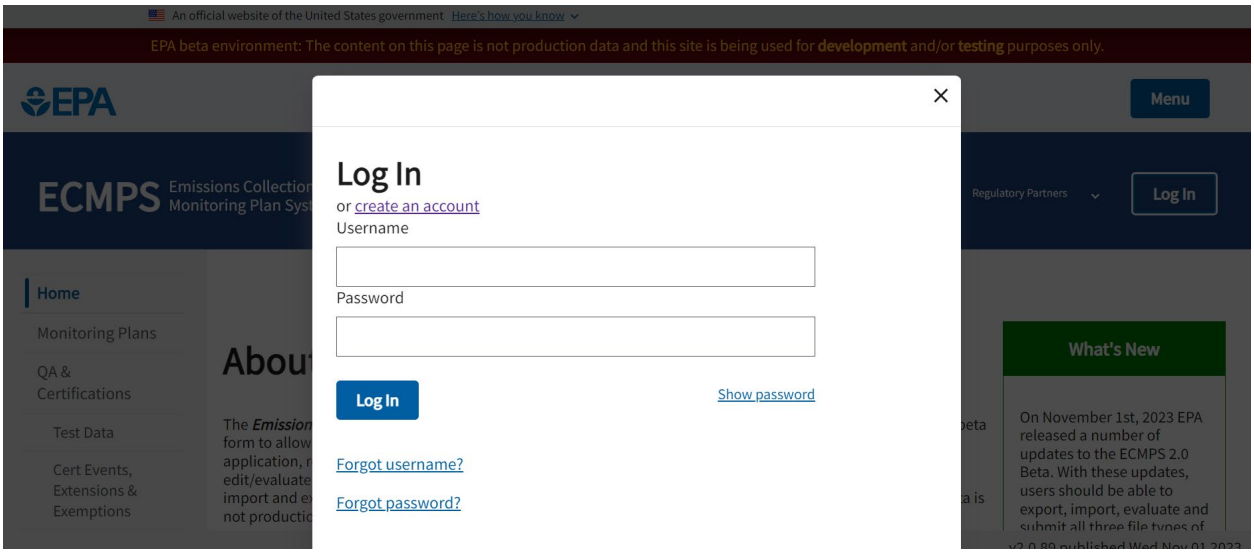
You will get an email notification when "Your Central Data Exchange (CDX) CDX Role has been activated by EPA." Log in and fill out your signature questions. After this, you should be all set up in CDX Test.



Step 15: Log into https://cbsprodbeta.epa.gov/CBS to Link your CDX Test Account

Log into CBS Beta to link your CDX Test account in our system. You may need to wait a few minutes after you register in CDX to try logging into CBS Beta. Make sure you have the appropriate access to the plants that you access to in production. If you do not see the plants that are responsible for, please send an email to cbs-testing@camdsupport.com.



Step 16: Log into https://ecmps-beta.app.cloud.gov/

If you are an ECMPS user, log into ECMPS Beta and check that you have access to the appropriate to the plants. If you do not, please contact ecmps-beta@camdsupport.com.