DISCLAIMER

This user guide describes for Compliance Monitoring Data Portal (CMDP) users (laboratories, water systems and state primacy agencies) the CMDP role registration sequences in the EPA’s Shared CROMERR Services (SCS) web application. This document was created solely for CMDP users, to support state primacy agency compliance with the EPA’s Cross-Media Electronic Reporting Rule (CROMERR). This user guide does not constitute any EPA policy directive or regulation, and does not establish or affect any regulatory or statutory rights or obligations for SCS or CMDP users.
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CMDP Role Registration User Guide

1.0 - Background

Shared CROMERR Services (SCS) is a web application and set of web services developed and supported by EPA’s Office of Environmental Information (OEI) to help EPA and state programs meet the electronic reporting, signature, and recordkeeping requirements of the CROMERR.¹ Before using CMDP, each user must first register with EPA’s Shared CROMERR Services (SCS) to receive a user name and password (credentials). After registration, once the registrant is an approved user (either by a sponsor or by a designated help desk), he or she will be able to access the CMDP using the credentials received from SCS.

1.1 – Purposes of the CMDP Role Registration User Guide

The sole purpose of this CMDP Role Registration User Guide is to describe for CMDP users how to register for each CMDP role when using the SCS web application. Separately, there is an SCS Advanced Services Help Desk User Guide specifically for SCS help desk roles,² including the State CMDP Administrator. The SCS User Guide describes the three SCS administrative roles and their broad array of functionality within the SCS web application: the Central Help Desk, which is managed by an OEI contractor and will help CMDP users with bug fixes and updates; the Partner Help Desk, also managed by an OEI contractor, which will provide pre-registration support for CMDP users and assist with registration problems on a limited basis; and, the Partner-Program Help Desk, which is the SCS name for the State CMDP Administrator, which will serve as the primary SCS help desk for state, lab and water system users. The functionality of the State CMDP Administrator, acting as a Program-Partner Help Desk in SCS, is different than the functionality of the State CMDP Administrator acting as an Administrator in the CMDP. The State CMDP Administrator will serve as the primary registration support for water system, laboratory or state agency staff. To help CMDP users understand the key role of the State CMDP Administrator in SCS, this user guide refers to both the CMDP role name and the SCS role name in the initial description, then uses the CMDP role name for the remainder of the document.³ Although a user registering for any CMDP role in the SCS user interface will see only the CMDP role names, users should be aware of the SCS terminology.

¹ Cross Media Electronic Reporting Rule (CROMERR). For more information please see EPA’s CROMERR website with more information on the rule.
² “Shared CROMERR Services (SCS) Advanced Services Help Desk User Guide”
³ Note that the Visio diagrams for role registration in section 2 of this document refer to the “State Help Desk” for brevity. The State Help Desk role name is synonymous with the State CMDP Administrator role name in CMDP and the Partner-Program Help Desk role name in SCS.
1.2 - “Submitter” Organization and “State” Organization Roles

There are four important distinctions among the roles available to CMDP users who are registering in SCS. The first distinction is between “submitter” and “state” organization roles.

- **Submitter Organization Roles**: “Submitter organizations” are private laboratories, public water systems (PWSs) and state laboratories that use the CMDP. “Submitter roles” are performed by users representing organizations that use the CMDP to submit drinking water sample results to a primacy agency which has enforcement authority for drinking water regulations. The submitter roles are: Preparer, Reviewer, Certifier and Administrator.

- **State Organization Roles**: “State organizations” are any organizations that have primary enforcement authority (primacy) for national primary drinking water regulations (NPDWRs). State organizations (i.e., states) may include an EPA Region, state, county, or tribal government. “State roles” are performed by users representing the state organizations which receive drinking water sample results and make compliance determinations based on those results. The state roles are: Administrator and Compliance Officer.

1.3 – “Administrative” and “non-Administrative Roles

The second distinction is between administrative and non-administrative roles.

- **Administrative (Admin) Roles**: administrative roles are performed by any submitter or state users who require additional functionality in SCS not available to any non-Administrative users. This additional functionality varies, however, depending on whether the Administrator represents a state organization or a submitter organization. All administrative roles require identity assurance and must complete additional registration steps.

- **Non-Administrative Roles**: non-Administrative roles are performed by lab or water system users, or by state users, whose functionality is limited to registering in SCS as a Preparer, Reviewer or Certifier, and for Certifiers, the ability to search and view copies of record (CORs) which an individual has generated for the organization they are associated with in SCS. State non-administrative role functionality is limited to registering in SCS as a Compliance Officer, and to searching and viewing copies of record (CORs) submitted to the state organization to which they are associated in SCS.
1.3.1 – State Administrative Roles and Submitter Administrative Roles

The third distinction is between two kinds of Administrative Roles, one for state organizations and one for submitter organizations.

- **State Administrative Roles: State CMDP Administrator or “Program Partner Help Desk”**

A State CMDP Administrator role (known as a Program-Partner Help Desk in SCS) has significant administrative functionality in SCS across the following SCS functionality groups: user management, pending requests, pre-registration, alert publishing, theme, and CROMERR administration. These administrative roles entail a level of access to SCS data and functionality which necessitate additional steps during registration to ensure that he or she can be entrusted with the responsibilities associated with these roles. For a complete summary of all of the functionality available to State Administrative Roles, please see Figure 4 below.

- **Submitter Administrative Role: (Submitter) CMDP Administrator or “Sponsor”**

A State Laboratory, Private Laboratory or PWS CMDP Administrator has far less administrative functionality in SCS than the State CMDP Administrator; he or she is limited to acting as a “Sponsor” for other laboratory or public water system users in their organization, e.g., the private lab, state lab or PWS of which they are an employee, in the following areas:

  - Initiate new sponsorship requests (for their own organizations)
  - Approve or Reject sponsorship requests
  - Revoke active sponsorships

However, in addition to these SCS administrative functions, the Submitter CMDP administrative roles may also electronically sign and submit drinking water sample results in CMDP. Therefore the submitter administrative roles still require additional registration steps.

1.4 – “Closed” and “Open” SCS Registration Roles

The fourth distinction is between “closed” and “open” registration roles. “Closed” means that a user cannot initiate the registration sequence for the desired role from the SCS Home Page without first having received an invitation from a State Help Desk, for a State Compliance Officer role, or from the SCS Partner Help Desk (contractor supported) for a State CMDP Administrator role. “Open” means that the user can initiate the registration sequence for the desired role from the SCS Home Page without prior approval from the Central Help Desk.

Figure 1 below summarizes the four role distinctions from sections 1.1 to 1.3.
1.5 - CMDP Role Hierarchy

All CMDP roles are hierarchical within an organization, as shown in Figure 2 below. For example, a Water System CMDP Administrator has all the CMDP functionality available to Certifiers, Reviewers and Preparers; Certifiers also have access rights as Reviewers and Preparers; and, Reviewers also have access rights as Preparers. (Figure 2: CMDP Role Hierarchy)

1.6 – Initial SCS Registration Sequence for State and Submitter Organizations

To ensure that SCS registration is successful for both the primacy agency users and the submitters who will report sample results to primacy agencies, the primacy agency, and its labs and water utilities must follow the initial SCS registration sequence described below, and as shown in Figure 3. Recommendations for each step in the sequence also are provided.
Step 1 – State Pre-registration Request. The role registration sequence in SCS for any state or submitter organization users cannot begin until the state organization receives the initial pre-registration invitation e-mail from the SCS Partner Help Desk. Therefore, before any other CMDP users attempt to register in SCS, at least one, ideally two to three, individuals in the primacy agency should request State CMDP Administrator roles by asking EPA’s CMDP Help Desk to contact SCS on their behalf. SCS will then initiate pre-registration on behalf of the initial person/people requesting State CMDP Administrator role status.

After the first State CMDP Administrator’s role is active, that primacy agency may create additional State CMDP Administrators, as the initial State CMDP Administrator may pre-register other individuals from that primacy agency, without EPA or SCS Help Desk involvement. Note that the SCS Partner Help Desk is not a state drinking water program role; contact information for the Partner Help Desk is available on the SCS Homepage.

Step 2 – State CMDP Administrator Registration and Role Activation. Any State CMDP Administrators must complete the registration process by following the required sequence (see Section 2.1 below).

- These roles must be established before the State may approve the Administrators for all Submitter organizations, e.g., “Private Lab CMDP Administrator”.
- The “State Compliance Officer” does not require a State CMDP Administrator’s approval during registration, but as a closed registration role, the registrant must submit a pre-registration request to the State CMDP Administrator.

Step 3 – (Submitter) CMDP Administrator Registration and Role Activation. Next, each Submitter Organization (Private Lab, State Lab or PWS) should attempt to register at least two CMDP Administrators.

- Administrators for any Submitter organization must be established before Preparers, Reviewers and Certifiers from their organizations can complete registration.
- A large water system that has an “in-house” laboratory should have at least one user registered as a Private Lab CMDP Administrator, and one user registered as a PWS CMDP Administrator. Having one of each administrative role will ensure that the PWS can view and request updates to its PWS Profile and its Laboratory Profile.

Step 4 – Other CMDP Role Registration and Role Activation. Any PWS, Private Lab or State Lab Preparer, Reviewer or Certifier/Submitter should register for his or her organization only after Step 3 is completed, because each of these roles requires “sponsorship” by a Submitter CMDP Administrator.
- Large laboratories or water systems reporting a high volume of sample results should consider utilizing the CMDP’s Preparer and Reviewer roles to help manage workload.
- Contract operators or circuit riders should register for Private Laboratory roles so they can report information for multiple water system clients.

**Approval Sequence for CMDP Role Registration in SCS**

*Certifier also must be approved by State Administrator if applicant declines Lexis/Nexis during registration*
2.0 - CMDP Registration in SCS for Administrative and non-Administrative Roles

Section 2.0 of this user guide describes each of 6 CMDP role registration sequences using the SCS web application. Note that for each sequence, the web form or pick-list available in the SCS user interface is identical; therefore, in some cases the user guide references screen shots for registration sequences already presented in the document, rather than feature an identical screen shot.

2.1 - State CMDP Administrator (SCS Program-Partner Help Desk) Registration Sequence

When contacting CMDP Help Center, include:

- User first name
- User last name
- User email
- Program (CMDP)
- Partner (State name)
- Role (State CMDP Administrator)
- Organization (State agency address)

Figure 4- State CMDP Administrator Registration Sequence

Step 1. As shown in Figure 4, to begin the State CMDP Administrator sequence, the state registrant sends a pre-registration request through the EPA’s CMDP Help Center, containing the following details:

1. First Name
2. Last Name
3. User E-mail (to be used for registration and account profile; may be different than work e-mail used for other purposes).
4. Partner (e.g. Rhode Island)
5. Program (CMDP: Compliance Monitoring Data Portal)
6. User Role (State CMDP Administrator)
7. User Organization (e.g., Pennsylvania DEP)
The CMDP Help Center point of contact (POC) will provide to the SCS Partner Help Desk (contractor) all of the information from Step 1, above, for the SCS Help Desk to complete the pre-registration sequence for this closed registration role. Once the pre-registration request is complete, the pending State CMDP Administrator will receive a registration e-mail invitation from SCS, as shown in Figure 5, below. The registrant accepts the invitation by clicking on, or by copying and pasting, the first URL provided in the registration e-mail.

A Customer Retrieval Key (CRK) has been created for you to complete the registration process of adding a program service utilizing the EPA’s Shared CROMERR Services (SCS). 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 SCS account and entering your User ID and Password or by creating a new SCS account.

https://test.epagdx.net/EPASharedServicesPortal/PreRegistration?cid=0694E31B3DA8

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.

SCS Registration Homepage

https://test.epagdx.net/epasharedservicesportal

Figure 5- Registration E-mail from SCS

Either method of using this first URL in Figure 5 brings the user directly to the SCS Account Creation screen shown in Figure 6 below. At this screen, each registrant should select the Create New Account button.
Steps 2-4. After selecting *Create New Account* button, the registrant will see the **Terms and Conditions/Privacy Policy** screen as shown in Figure 7. After selecting the *Accept* button, the user will see the **Rules of Behavior** screen for review as shown in Figure 8.
Step 5. After accepting the Rules of Behavior, the registrant will view and complete the Account Profile screen. The Account Profile includes two sections, one for the Account Owner information (the person registering) and one for the Account details that include the registrant’s credentials (user ID and password) along with three security questions and answers, which can be used in case a user forgets his or her password.
Figure 9- Account Profile
Step 6. After completing the Account Profile, the registrant will verify the Organization Information shown in Figure 10. The address of the organization selected during the pre-registration process will automatically be selected and will appear in this screen. In the example in Figure 10, in the pre-registration e-mail to the SCS Partner Help Desk, the registrant had requested Rhode Island as the Partner, and therefore the associated address for Rhode Island’s drinking water primacy agency is displayed. After clicking on the Continue button on this screen, the State CMDP Administrator role will be activated, as shown in the SCS Dashboard in Figure 11.
Figure 11 – Successful State CMDP Administrator Role Activation
2.2 - State Lab CMDP Administrator Registration Sequence

**Step 1.** Unlike the State CMDP Administrator role, which is obtained through closed registration, the State Lab CMDP Administrator role is obtained through open registration. As a result, the registrant begins the sequence at the **SCS Registration Home Page** (see Step 1 in Figure 12 below) and selects the **Register with SCS** button (Figure 13).

![Figure 12 - State CMDP Administrator Registration Sequence](image-url)
Steps 2-4. The registrant then uses the pick list prompts to select Partner (State Name), Program (CMDP) and Role (State Lab CMDP Administrator) and clicks the Continue button. In the example shown below, the registrant is registering as the Rhode Island State Lab Administrator (Figure 14).
Steps 5-8. After clicking Continue from the Partner/Program/Role screens, the registrant completes the same sequence of web forms shown in Figures 7-10 above for: Privacy Policy/Terms and Conditions; Rules of Behavior; Account Profile, including the three security questions; and, Organization Information, including a phone number, which is a required field.

Step 9. Once the Organization Information page is completed, SCS will send the registrant a Verification E-mail containing a validation code (see Figure 15 below). The user must check the email account used during registration to open the e-mail containing the validation code, as shown in the highlighted area in Figure 15 below.

You are receiving this email because you have successfully created a RI account with EPA Shared Services Portal. Please note, your registration is not yet complete. You will need to enter the password that was selected during the registration process.

https://test.epaconline.net/EPASharedServicesPortal/Registration/SubmitEmailValidation?User=dWVRTLABADMIN&Code=C4sE95Qv7939&_Role=d9406

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

b) In your existing browser window, copy and paste the following code into the “Validation Code” field on the signature web page:

EC4aE95Qv7939

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 can log in to your account. Please do not respond to this message. If you have questions concerning this request, you may contact us at the Rhode Island Helpdesk.
Step 10. The registrant should complete the account verification process using the Validation Code entry form, either by copying and pasting the code included in the Verification e-mail, or by typing the code directly into the field called “Code,” and then should select Create Account (see Figure 16 below).

![Figure 16 - E-mail Validation Code Entry Form](image)

Step 11. Once the e-mail validation code is entered and Create Account selected, SCS will notify the State CMDP Administrator that there is a pending request from a State Lab Administrator. The registrant can view the approval status of their role request in the Dashboard. Until the State CMDP Administrator logs into SCS and approves the role request, it will remain in “Awaiting Approval” status, as shown in Figure 17.

![Figure 17 - State Lab Awaiting Administrator Role Activation](image)
Step 12. Once the State CMDCP Administrator approves the role in SCS, the role is activated and the registrant has become an official user who may access both SCS and CMDCP using the username and password entered into the Account Profile (see Figure 9 above). Concurrently, the user will receive a Role Activation E-mail from SCS as shown in Figure 18.

![Role Activation E-mail](image)

This email is to notify you that your Advanced Shared CROMERR Services (SCS) State Lab CMDCP Administrator Role has been activated. In order to access this role, please login using your credentials via the SCS Registration Homepage: [https://dev.epacdx.net/epasharedservicesportal](https://dev.epacdx.net/epasharedservicesportal)

*Figure 18 - Role Activation E-mail*

Now the user may log back into SCS using the username and password created during registration, and see the State Lab CMDCP Administrator role as “Active” in the Dashboard, as shown in Figure 19.

![Dashboard View of Activated State Lab Administrator Role](image)

*Figure 19 - Dashboard View of Activated State Lab Administrator Role*
2.3 - Private Lab or PWS CMDP Administrator (Sponsor) Registration Sequence

**Steps 1-10.** As shown in Figure 20, the first 10 steps in the Private Lab or PWS CMDP Administrator registration sequence are identical to the State Lab CMDP Administrator sequence. The registrant initiates an open registration sequence by going to the SCS Home Page and selecting the Register with SCS button, then completing the Program/Partner/Role screens. After accepting the Terms and Conditions/Privacy Policy and Rules of Behavior, the registrant completes the Account Profile, including the user ID, password and three security questions, completes the Organization Information form, receives the Verification E-mail, and enters the code into the Validation Code Entry Form. Screen shots for all these steps are identical to those featured in the above sequences.

![Figure 20 - PWS or Private Lab Administrator Registration Sequence](image-url)
The example in Figure 21 shows a registrant preparing a request for a PWS CMDP Administrator role in the State of Kansas. For registrants who are unsure how to find an organization in SCS, the Advanced Search feature, shown in Figure 22, allows the registrant to use a variety of search parameters to see which organizations are stored in SCS, and then select his or her organization name and address. In this test example, the user searched for organizations associated with the State of Kansas whose addresses are stored in SCS, to find the name and address for the City of Lawrence, Kansas public water system.
Because the Private Lab or PWS Administrator role includes the ability to electronically sign and submit Sample Jobs in the CMDP, in order to comply with the CROMERR’s legal requirements, there are additional registration steps for this role. These steps include: on-line Lexis/Nexis Identity Assurance, online Electronic Signature Agreement or paper Electronic Signature Agreement, Challenge Questions and Answers which are used during the electronic signature process, and a Signature Device Authentication process.

**Step 11.** Figure 23 shows the optional on-line Lexis/Nexis Identify Assurance screen. The web form asks the registrant to provide the following data: home address, home phone, last four digits of the user’s social security number (SSN) and date of birth. Once this form is completed and submitted to Lexis/Nexis, the web form data are deleted from SCS.
Step 12. If the Lexis/Nexis Identity Assurance results are successful, the registrant is directed to the Challenge Questions and Answers (Figure 24). The registrant selects five (5) challenge questions from among 20 options, answers each question in turn, then selects Save Answers. Unlike the Lexis/Nexis search screen, the data entered in the Challenge Questions and Answers screen must be saved in the SCS database, because when the user submits a Sample Job to the primacy agency in the CMDP web application, one of the five questions will be presented to the CMDP user, the user must provide the correct answer as part of the CMDP signature ceremony.
After saving the answers to the 5 selected challenge questions, the registrant concurrently will receive an “eSig-PIN” (electronic signature personal identification number) e-mail from SCS, as shown in Figure 25, and will be redirected to the Electronic Signature Agreement (ESA) screen as shown in Figure 26. The eSig-PIN e-mail states that the registrant may go to the SCS Dashboard to see the five challenge questions that he or she selected in Step 12 (Figure 24) of this role registration sequence.
Step 13. After the registrant reviews the contents of the **On-line Electronic Signature Agreement** (on-line ESA in Figure 26 below) for the primacy agency to which they will be submitting the sample results via the CMDP, the registrant must select the **Sign Electronically** button, and then must review and accept the **Certification Acknowledgement** (Figure 27).

Step 14. After selecting **Accept** from the **Certification Acknowledgement** pop-up window, the user is redirected to the **Signature Device Authentication** screen as shown in Figure 28.
Figure 27- ESA Certification Acknowledgement “Pop-Up” Window

Figure 28- Signature Device Authentication
To complete the **Signature Device Authentication** form, the registrant enters his or her password and provides the answer to a pre-selected challenge question presented by SCS; the challenge question is one of the five selected by the registrant earlier in the registration process. In this case, the registrant answered the challenge question “What is your favorite book?” and selected the *Sign* button (Figure 28). After completing this **Signature Device Authentication** form, the PWS or Private Lab Administrator registrant has nearly completed the registration process, and now may log into the **SCS Dashboard**.

**Step 15.** Before the PWS or Private Lab Administrator can log into CMDP as a user, however, the State CMDP Administrator must approve the role request in SCS, at which time the role is activated and the user may access both SCS and CMDP, using the username and password which the registrant had entered into the **Account Profile**. Until the State CMDP Administrator approves the requested role, the PWS or Private Lab Administrator the approval status of the role request in the **SCS Dashboard** will remain as “Awaiting Approval,” as shown in Figure 29. Once the State CMDP Administrator approves this account, the registrant will receive a role activation e-mail from SCS (see Figure 18 above), and the approval status in the user’s Dashboard will change to “Active” (see Figure 11 above).

*Figure 29- PWS Administrator Awaiting Role Activation*
Step 12b. As noted in the PWS or Private Lab Administrator registration sequence (Figure 20 above), if the Private Lab or PWS Administrator registrant declines to perform Step 11, online Lexis/Nexis Identity Assurance, it is mandatory that he or she complete a paper Electronic Signature Agreement (paper ESA). Registrants should note that if he or she selects the paper ESA option, the on-line registration process is delayed until (off-line) the registrant has: prepared the Paper ESA form correctly and submitted it to the state primacy agency. The State CMDP Administrator, who may activate the role, also must review the Paper ESA to ensure it meets state requirements.

The registration sequence for the Private Lab or PWS Administrator choosing the paper ESA option is identical to the sequence using the electronic ESA option through Step 11. At Step 11, however, when the registrant is presented with the LexisNexis Identity Assurance screen shown in Figure 23 above, he or she may instead select the Use Paper Agreement button in the lower left corner (see blue highlighted area in Figure 30 below), which changes the sequence.

After selecting the Use Paper Agreement option, the registrant may view (scroll through) the Paper ESA screen as shown in Figure 31 below. The registrant may then select Sign Paper Form in the lower left corner of the Paper ESA screen, which will produce a printable version of the paper ESA (Figure 32). Offline, the registrant must sign and submit the printed paper ESA according to the state’s requirements, and mail it to the state agency for review and approval.
Figure 31 - Paper ESA Screen
Step 13b. As shown in Figure 33, the registrant seeking a PWS CMDP Administrator role for Baton Rouge Water Company can see in his or her SCS Dashboard that the State CMDP Administrator has not yet approved the role based on the paper ESA process.
**Step 14b.** Once the State CMDP Administrator logs into SCS and approves the ESA, the registrant must go into CMDP and complete the **Challenge/Questions and Answers** form, and save the results (see Figure 24 above). The CMDP role is now activated, and the PWS Administrator user can see that the role is Active in his or her SCS Dashboard (Figure 34).
2.4 – PWS and Private Lab Preparer, Reviewer, and State Lab Submitter Registration Sequence

Steps 1-9. As shown in Figure 35, the registrant for a Preparer, Reviewer or State Lab Submitter role follows a registration sequence that is common to all open registration roles by going to the SCS Home Page, selecting the Partner, Program and Role, accepting the Terms and Conditions and Privacy Policy, completing the Account Profile including security questions, username and password, completing the Organization Information screen, receive a Verification E-mail with Verification Code, and submit the Verification Code to SCS. Screen shot examples for all of these steps are shown in the above registration sequences. In the example in Figure 36 below, the registrant is requesting a role as a PWS Preparer in the State of Oregon.
Step 1. Go to SCS Home Page and Select “Register with SCS”

Step 2. Select Partner (or Program)

Step 3. Select Program (or Partner)

Step 4. Select Preparer or Reviewer Role

Step 5. Accept Privacy Policy/Terms and Conditions

Step 6. Enter User Information in Account Profile

Step 7. Choose Your Organization

Step 8. Verification E-mail with Validation Code

Step 9. Account Verification with Validation Code

Step 10. Request Sponsorship from Organization

Step 11. Sponsor Approval Notification via E-mail

User Role Activated - Credentials Now May be Used for SCS or CMDP

* Registration sequence for State Lab Submitters is the same as the sequence for State Lab, Private Lab and PWS Preparers and Reviewers, because the CROMERR e-signature requirements do not apply to state labs.

Figure 35 - SCS Registration Sequence for Preparers, Reviewers and State Lab Submitters
Step 10. As noted in user guide section 1.3, an important difference in the registration sequence for non-administrative roles compared to administrative roles is the need for sponsorship. All submitter non-administrative roles must be “sponsored” by an administrator for the submitter organization which the user represent in CMDP (see table 1 above for reference). For example, a private lab Preparer, which is a non-administrative role, must be sponsored by a Private Lab CMDP Administrator. As a result, after completing the Validation Code Entry Form in Step 9, the registrant must use the Sponsor Information web form to request sponsorship from the CMDP Administrator for his or her Organization (Figure 37). In the fictional example below, the PWS Preparer populates the e-mail address of the sponsor and confirms the e-mail address. Both fields must match for the registrant to continue the registration sequence.
After selecting the *Continue* button, the registrant may view the status of their role registration in the **SCS Dashboard** (Figure 38), and he or she also will receive an e-mail from SCS (Figure 39). Concurrently with the registrant, the PWS CMDP Administrator for the organization (in this example, Portland Water Bureau) will receive an e-mail notification (Figure 40).
Figure 38 – PWS Preparer View of Sponsorship Status in SCS Dashboard

This is a confirmation that your sponsorship request for the following has been sent to bowman.will@epa.gov. The details of that role that you are requesting sponsorship for are outlined below:

Contact Organization: PORTLAND WATER BUREAU (OR4100657)
Program Service: Compliance Monitoring Data Portal
Role: PWS Preparer
Additional Info: N/A

Please do not reply to this message.
SCS Registration Homepage
https://test.epaclix.net/epasharedservicesportal

Figure 39 - Sponsorship Request Notification E-mail
William Bowman with registered email address bowman.will@epa.gov is requesting your sponsorship for the following PWS Preparer role.

Contact Organization: PORTLAND WATER BUREAU (OR4109657)
Program Service: Compliance Monitoring Data Portal
Role: PWS Preparer
Additional Info: N/A

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

Please do not reply to this message.
SCS Registration Homepage
https://test.epacdx.net/epamardata/epsharedservicesportal

Figure 40 - Sponsorship Request E-mail to Sponsor

**Step 11.** Next, the PWS Administrator (Sponsor) must log into SCS, and check for Pending Requests from the SCS Dashboard. Once the Sponsor logs into SCS and approves the role, in this case, a Preparer for Portland Water Bureau, the role will be activated, and the user will see the Preparer role as “active” in his or her SCS Dashboard, as in the example in Figure 11 above.

2.5 - Private Lab or PWS Certifier Registration Sequence

**Steps 1-9.** The Private Lab or PWS Certifier registration sequence is shown in Figure 42 below. As an open-registration role, the registrant begins by selecting Register with SCS button at the SCS Home Page and selecting the Program, Partner and Role. In the example in Figure 41, the registrant is requesting a Private Lab Certifier role in the State of Oregon.
After accepting the Terms and Conditions/Privacy Policy, the registrant completes the Account Profile, including the user ID, password and three security questions, populates the Organization Information, receives the Verification E-mail and uses the provided code to complete Validation Code Entry Form. Note that the registrant does not need to accept the Rules of Behavior because the role has no administrative functionality in SCS.

Steps 10 and 11. Like the Preparer or Reviewer registration sequence, the registrant also must request sponsorship from the organization it will be representing when he or she is using the CMDP. See Figures 37-40 above for examples of Sponsorship Request screen shots for Steps 10-11 in the Private Lab or PWS Certifier registration sequence.
Steps 12-15. Once the PWS or Private Lab Administrator (Sponsor) for the Certifier’s organization has approved the Certifier’s Sponsorship Request, the remainder of the registration sequence is identical to the PWS or Private Lab Administrator’s: the registrant must complete the optional on-line Lexis/Nexis Identity Assurance form, an online ESA or paper ESA, Challenge Questions and Answers which are used during the electronic signature process, and a Signature Device Authentication process (if the online ESA option is selected). See the PWS or Private Lab Administrator registration sequence in section 2.3 above for examples of screen shots for each of these steps, including the Paper ESA option.
2.6 - State Compliance Officer Registration Sequence

The State Compliance Officer is the only non-administrative CMDP role that is *closed registration*, meaning the registrant must request a pre-registration invitation from the SCS Partner Help Desk (contractor) or the State CMDP Administrator. The registration sequence in Figure 43 is nearly identical to the State CMDP Administrator registration sequence, with one exception: the user will have no administrative functionality within SCS, and therefore the registrant is not required to accept the SCS **Rules of Behavior**. In this example, the registrant is requesting a State Compliance Officer role for the State of Louisiana.

**Step 1.** Request pre-registration from State Help Desk via e-mail and include:
- User First Name
- User Last Name
- User E-mail
- Program (CMDP)
- Partner (State Abbreviation)
- Role (State Compliance Officer)
- Organization (State Agency)

**Step 2.** Select Hyperlink and select Create New Account

**Step 3.** Accept Privacy Policy/Terms and Conditions

**Step 4.** Enter User Information In Account Profile

**Step 5.** Confirm Organization Automatically Selected via Pre-Registration Request

User Role Activated - Credentials May be Used for SCS or CMDP

---

**Figure 43 - State Compliance Officer Registration Sequence**

**Step 1.** Because the role is closed registration, the begins the process by submitting a pre-registration request to the Partner Help Desk or State CMDP Administrator containing the following details:

1. First Name
2. Last Name
3. User E-mail (to be used for registration and account profile; may be different than work e-mail used for other purposes).
4. Partner (e.g. Louisiana)
5. Program (CMDP: Compliance Monitoring Data Portal)
6. User Role (State Compliance Officer)
7. User Organization (e.g., Louisiana Department of Health)

The Partner Help Desk will use all of the information in items 1-7 above to complete the pre-registration sequence for this closed registration role.

**Step 2.** Once the pre-registration request is complete, the registrant will receive a **Pre-Registration Verification E-mail** from SCS to the e-mail address he or she provided to the SCS Partner Help Desk in Step 1, as shown in Figure 44 below. The registrant may accept the invitation copying the first link e-mail from SCS and pasting it into a web browser. After pasting the URL into the web browser, the user will see an **SCS Account Creation** screen as shown in Figure 45. Next the user selects the **Create New Account** button.

---

**Pre-Registration Email Verification Request (TEST)**

SCS Administrator <scs@epacdx.net>

Today, 10:04 AM
Bowman, Will

A Customer Retrieval Key (CRK) has been created for you to complete the registration process of adding a program service utilizing the EPA’s Shared CROMERR Services (SCS). 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 SCS account and entering your User ID and Password or by creating a new SCS account.

https://test.epacdx.net/EpaSharedServicesPortal/PreRegistration?crk=6fCF98be521A

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.

SCS Registration Homepage
https://test.epacdx.net/epasharedservicesportal

*Figure 44- Pre-Registration E-mail from SCS*
Steps 3-5. To complete registration for the Compliance Officer role, the registrant reviews and accepts the Terms and Conditions and Privacy Policy for their agency, completes an Account Profile including three security questions for password resets, and confirms that the Organization Information which appears in SCS is correct. Once the registrant confirms the Organization Information, the registration is complete, and the user role is activated, as shown in Figure 46.
2.6.1 – CMDP Role Registration for Multi-State Labs

A private lab which is physically located in one state, but which is certified to perform sample analysis for client water systems in two or more states, is often referred to as a “multi-state” lab. Because the CROMERR applies to all state drinking water programs, and each state drinking water program assigns its own laboratory IDs to any laboratories from which it receives sample results, a multi-state lab must obtain approved CMDP roles from SCS for each primacy agency (Partner) to which it will submit sample results in CMDP. The sequence for obtaining each of these roles (Administrator, Certifier, Reviewer, and Preparer) is outlined in this user guide, and is the same for a multi-state lab registrant as for any other registrant. To reduce the number of CMDP credentials a multi-state lab user must obtain from SCS, however, an approved user registering in SCS with additional state Partners may use the same set of credentials for each role. For example, consider a Certifier for a fictional private lab called Laboratory Sampling Services (“LSS”) in State A which also has client water systems in neighboring State B. The Private Lab Certifier for LSS may initially obtain an approved CMDP role in SCS for reporting sample results to State A. To also report sample results to State B, the Certifier must register in SCS and select State B as the Partner in the Partner/Program/Role
registration sequence. In addition, both State A and State B must have included the physical location of LSS, including the unique state lab ID, to SCS, so that the LSS organization information (e.g., organization name and address) is correctly associated with both State A and State B as Partners. After successfully registering as a Private Lab Certifier for LSS reporting to State A, once the Certifier has established Partner/Program/Role associations for State B, the Certifier may use the same username and password in CMDP for reporting sample results to either State A or State B.

3.0 – Summaries of SCS Registration Requirements and Program-Partner Help Desk Functionality

Table 1 below summarizes the CROMERR roles and the SCS role registration requirements for each of the four organization types (Private Lab, Water Utility, State Laboratory, Primacy Agency) in SCS during a registration sequence. Please note that all of these requirements are identified in each of the Visio diagrams for each of the six unique role registration sequences. Table 2 below summarizes the administrative functionality available to each of the Help Desk roles in SCS. State CMDP Administrator functionality is listed in the far right column (Partner-Program Help Desk).

**Table 1 - SCS Registration Requirements for CMDP Roles**

<table>
<thead>
<tr>
<th>Organization type / Role type</th>
<th>Requires Lexis Nexis or Paper ESA</th>
<th>Identity Assurance Score</th>
<th>2 factor sign and ESA</th>
<th>Partner Terms and Conditions</th>
<th>Rules of Behavior</th>
<th>Sponsor /Can Approve Sponsored Roles</th>
<th>Requires Sponsorship</th>
<th>Open Registration (ask through SCS) or Closed Registration (ask Help Desk directly)</th>
<th>Requires Approval</th>
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<tbody>
<tr>
<td>Commercial/Private Lab</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water Utility (Org type = Public Water System)</td>
<td>No/No</td>
<td>No/No</td>
<td>No/Yes</td>
<td>No/No</td>
<td>No/Yes</td>
<td>No/Yes</td>
<td>No/Yes</td>
<td>No/Open</td>
<td>No/Open</td>
</tr>
<tr>
<td>Private Lab CMDP Administrator</td>
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<td>Yes/Yes</td>
<td>Yes/Yes</td>
<td>Yes/Yes</td>
<td>Yes/Yes</td>
<td>Yes/Yes</td>
<td>Yes/Yes</td>
<td>Yes/Open</td>
<td>Yes/Open</td>
</tr>
<tr>
<td>Private Lab Certifier</td>
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<td>Yes/Yes</td>
<td>Yes/Yes</td>
<td>Yes/Yes</td>
<td>Yes/Yes</td>
<td>Yes/Yes</td>
<td>Yes/Yes</td>
<td>Yes/Open</td>
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<td>No/No</td>
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<td>No/Yes</td>
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<td>No/Open</td>
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</tr>
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<td>Yes/Yes</td>
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<td>PWS CMDP Certifier</td>
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P a g e  | 47
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<tr>
<th>SCS Functionality Group and Function</th>
<th>Role Name</th>
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<th>Partner Helpdesk *</th>
<th>Partner Program Helpdesk **</th>
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<td>Search Users</td>
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<td>Search Results</td>
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<td>Y</td>
<td>Y+</td>
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<td>User Details</td>
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<td>Reset Password</td>
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<td>N</td>
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<tr>
<td></td>
<td>View User's Inbox</td>
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<td>N</td>
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<td>View Password Expiration Date</td>
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<td>Security Questions - View/Edit</td>
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<td></td>
<td>Create/Search/Unpublish Email</td>
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<td>N</td>
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<tr>
<td></td>
<td>Create/Search/Unpublish MySCS</td>
<td>Y</td>
<td>Y</td>
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<td>Create/Search/Unpublish Recent Announcement</td>
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<td>Create/Search/Unpublish Home Page</td>
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