

# COMPLIANCE MONITORING DATA PORTAL ROLE REGISTRATION USER GUIDE

USING SHARED CROMERR SERVICES (SCS)

**PREPARED BY:**

U.S. EPA  
OFFICE OF WATER  
OFFICE OF GROUND WATER AND DRINKING WATER  
DRINKING WATER PROTECTION DIVISION

VERSION 1.2



## 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.<sup>1</sup> 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,<sup>2</sup> 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.<sup>3</sup> 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.

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<sup>1</sup> Cross Media Electronic Reporting Rule (CROMERR). For more information please see [EPA's CROMERR website with more information on the rule](#).

<sup>2</sup> "Shared CROMERR Services (SCS) Advanced Services Help Desk User Guide"

<sup>3</sup> 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.



	Administrative Roles	Non-Administrative Roles
Submitter Organization	<i>Open Registration</i> : Private Lab CMDP Administrator, PWS CMDP Administrator, State Lab CMDP Administrator	<i>Open Registration</i> : Preparer, Reviewer, Certifier, State Lab Submitter
State Organization	<i>Closed Registration</i> : State CMDP Administrator	<i>Closed Registration</i> : State Compliance Officer

**Figure 1-CMDP Role Summary**

### 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)



**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 not 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.

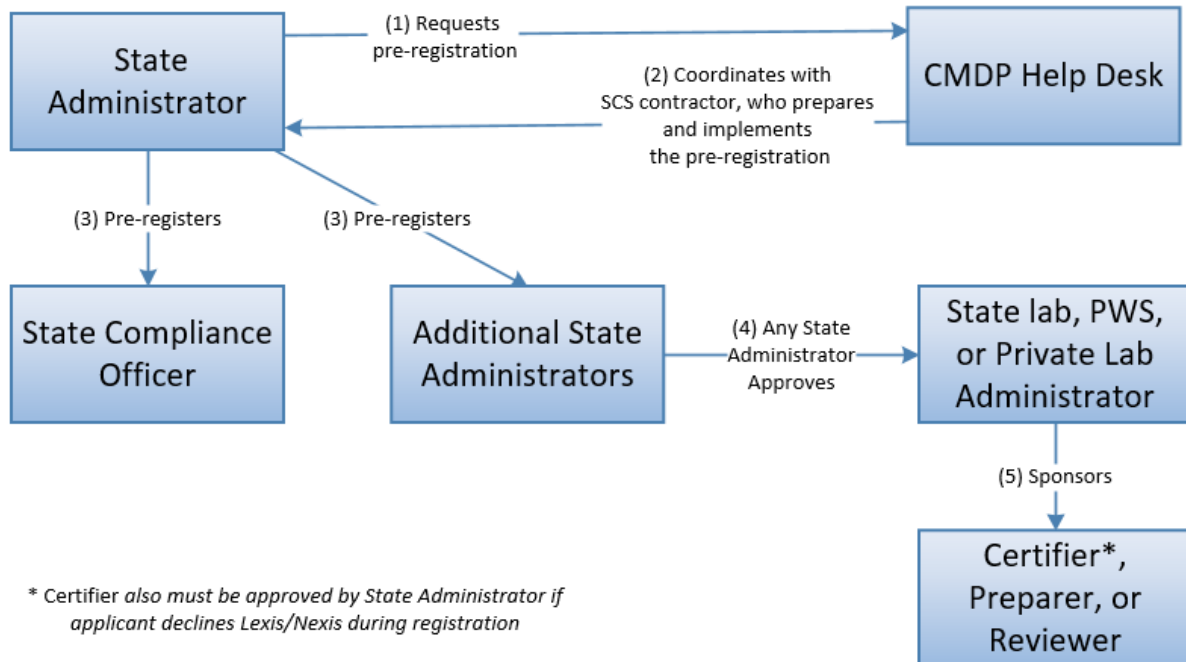
**Step 3 – (Submitter) CMDP Administrator Registration and Role Activation.** Next, each Submitter Organization (Private Lab, State Lab or PWS) should attempt to register at least two CMDP Administrators.

- 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 work load.
- 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

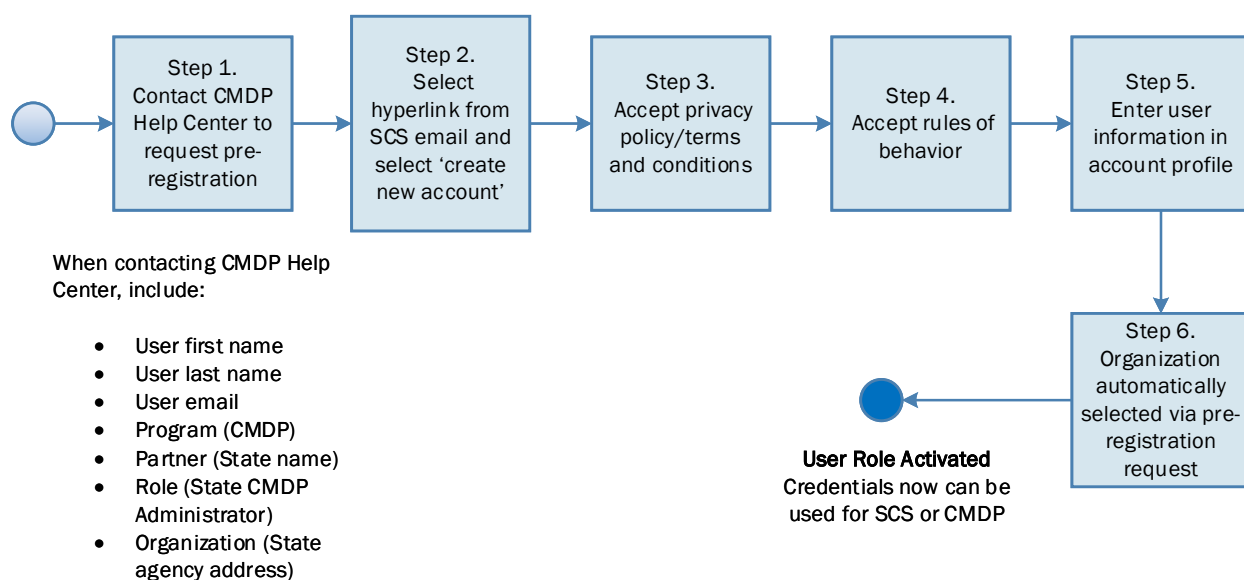


**Figure 3- Approval Sequence for CMDP Role Registration in SCS**

## 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



**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.epacdx.net/EPASharedServicesPortal/PreRegistration?crk=0b94E31B5DA8>

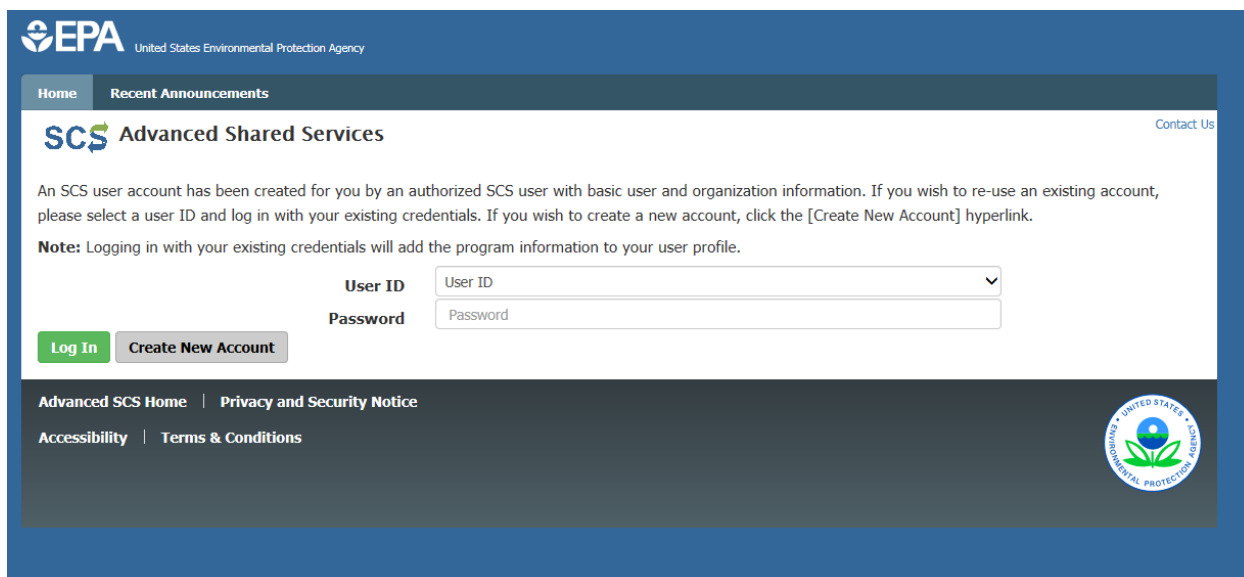
Once you have successfully logged into your account, you may be required to provide additional information to complete the process before you are able to access the Program Service.

SCS Registration Homepage

<https://test.epacdx.net/epasharedservicesportal>

**Figure 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.



The screenshot shows the 'SCS Advanced Shared Services' login and registration page. At the top is the EPA logo and the text 'United States Environmental Protection Agency'. Below this is a navigation bar with 'Home' and 'Recent Announcements'. The main heading is 'SCS Advanced Shared Services' with a 'Contact Us' link. A message states: 'An SCS user account has been created for you by an authorized SCS user with basic user and organization information. If you wish to re-use an existing account, please select a user ID and log in with your existing credentials. If you wish to create a new account, click the [Create New Account] hyperlink.' A note follows: 'Note: Logging in with your existing credentials will add the program information to your user profile.' There are two input fields: 'User ID' (a dropdown menu) and 'Password'. Below these are two buttons: 'Log In' (green) and 'Create New Account' (grey). The footer contains links for 'Advanced SCS Home', 'Privacy and Security Notice', 'Accessibility', and 'Terms & Conditions', along with the EPA seal.

**Figure 6- Create New Account**

**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.

Partner / Program / Role  
Program ID

Terms & Conditions

Rules of Behavior

Account Profile

Account Owner

Organization Information

Email Validation

Verify Identity

Signature Agreement

The access and use of SCS Registration for the electronic submittal of environmental information require the creation of a user ID and password that I must maintain and keep confidential. I will review the following steps concerning the creation and maintenance of a user ID and password.

**Warning Notice**

In proceeding and accessing U.S. Government information and information systems, you acknowledge that you fully understand and consent to all of the following:

1. you are accessing U.S. Government information and information systems that are provided for official U.S. Government purposes only;
2. unauthorized access to or unauthorized use of U.S. Government information or information systems is subject to criminal, civil, administrative, or other lawful action;
3. the term U.S. Government information system includes systems operated on behalf of the U.S. Government;
4. you have no reasonable expectation of privacy regarding any communications or information used, transmitted, or stored on U.S. Government information systems;
5. at any time, the U.S. Government may for any lawful government purpose, without notice, monitor, intercept, search, and seize any authorized or unauthorized communication to or from U.S. Government information systems or information used or stored on U.S. Government information systems;
6. at any time, the U.S. Government may for any lawful government purpose, search and seize any authorized or unauthorized device, to include non-U.S. Government owned devices, that stores U.S. Government information;
7. any communications or information used, transmitted, or stored on U.S. Government information systems may be used or disclosed for any lawful government purpose, including but not limited to, administrative purposes, penetration testing, communication security monitoring, personnel misconduct measures, law enforcement, and counterintelligence inquiries; and

Accept Reject

Advanced SCS Home | Privacy and Security Notice

Accessibility | Terms & Conditions

UNITED STATES  
ENVIRONMENTAL PROTECTION AGENCY

**Figure 7- Terms & Conditions/Privacy Policy**



Services Requested

Partner / Program / Role

Program ID

Terms & Conditions

Rules of Behavior

Account Profile

Account Owner

Organization Information

Email Validation

Verify Identity

Signature Agreement

Create your user information

Enter Account Identity Information. (Passwords must be a minimum of 8 alpha-numeric characters (no spaces or special characters) and contain at least 1 of each of the following: uppercase character, lowercase character, number. Passwords may not begin with a number nor contain the word "password" nor contain your User Name.) A required field is indicated with an asterisk (\*).

Account Owner

Title

Title

First Name \*

William

Middle Initial

Middle Initial

Last Name \*

Bowman

Suffix

Suffix

Email Address \*

bowman.will@epa.gov

Account

User ID \*

Password \*

This field is required.

Password

1. The password may only contain letters and numbers.

This field is required.

Confirm Password \*

Confirm Password

Security Question 1 \*

What was your childhood nickname?

Security Answer 1 \*

Security Answer 1

Security Question 2 \*

What street did you live on in third grade?

Security Answer 2 \*

Security Answer 2

Security Question 3 \*

What school did you attend for sixth grade?

Security Answer 3 \*

Security Answer 3

Figure 9- Account Profile



The screenshot shows a web application interface for 'SCS Advanced Shared Services'. On the left is a navigation menu with links: Home, Recent Announcements, Services Requested, Partner / Program / Role, Program ID, Terms & Conditions, Rules of Behavior, Account Profile (highlighted), Account Owner (highlighted), Organization Information, Email Validation, Verify Identity, and Signature Agreement. The main content area is titled 'Choose an organization' and contains a search bar with a 'Search' button. Below the search bar is an 'Advanced Search...' section. A message states: 'The following organization has been preselected for this registration process.' Below this, the organization 'RHODE ISLAND' is listed with the address '3 Capitol Hill Providence, RI US 02908'. There are input fields for 'Phone Number' (with a pre-filled value '(202) 564-3782') and 'Phone Ext' (with a pre-filled value 'Phone Ex'). A 'Back to search results' link is present. At the bottom right of the form are 'Continue' and 'Cancel' buttons. The footer contains links for 'Advanced SCS Home', 'Privacy and Security Notice', 'Accessibility', and 'Terms & Conditions', along with a circular logo for the 'UNITED STATES ENVIRONMENTAL PROTECTION AGENCY'.

*Figure 10 - Organization Information Form*

**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.

[Home](#)
[Recent Announcements](#)

SCS

/ Dashboard

[Contact Us](#)  
 Logged in as WBRISTADMIN (Log out)  
**Mail:** (0)

Program Services

[Services](#) | [Profile](#) | [Mail](#) | [Submission History](#)


Partner	Service	Role	Org	Status
RI	CMDP	State CMDP Administrator	RHODE ISLAND	Active

Showing 1 to 1 of 1 rows

Admin Tools

[User Management](#)  
[Pre-Registration](#)  
[Pending Requests](#)  
[Alert Publishing](#)

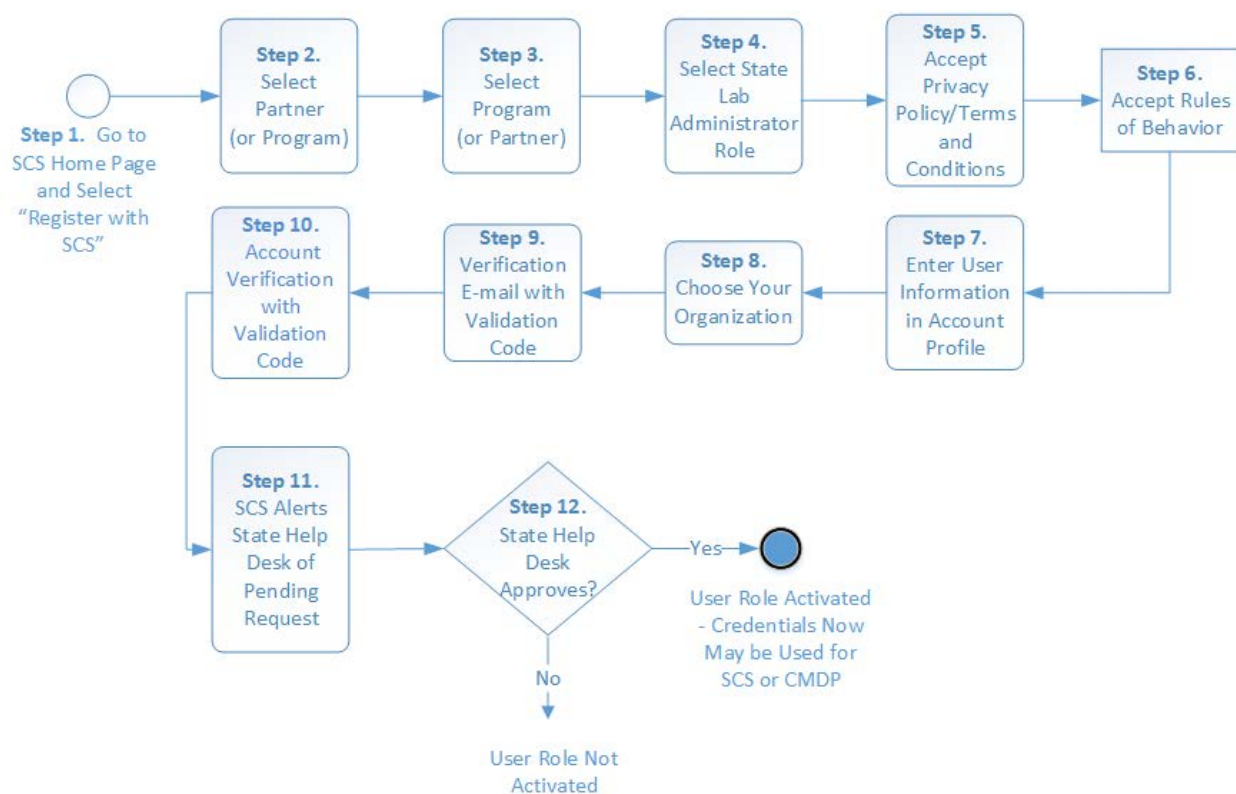
[Advanced SCS Home](#) | [Privacy and Security Notice](#)  
[Accessibility](#) | [Terms & Conditions](#)



**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**

**EPA** United States Environmental Protection Agency

Home Recent Announcements

**SCS** Advanced Shared Services [Contact Us](#)

**Log In**

User ID

Password

[Log In](#) [Register with SCS](#)

[Forgot your Password?](#)

[Forgot your User ID?](#)

[Warning Notice and Privacy Policy](#)

**Welcome**

Welcome to the Environmental Protection Agency (EPA) Shared CROMERR Services (SCS) - the Agency's electronic reporting site. The Shared CROMERR Services concept has been defined as a central point which supplements EPA reporting systems by performing new and existing functions for receiving legally acceptable data in various formats, including consolidated and integrated data.

**Warning Notice and Privacy Policy**

**Warning Notice**

EPA's Shared CROMERR Services Registration procedure is part of a United States Environmental Protection Agency (EPA) computer system, which is for authorized use only. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action. All information on this computer system may be monitored, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including law enforcement. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms.

**Privacy Statement**

EPA will use the personal identifying information which you provide for the expressed purpose of registration to the Shared CROMERR Services site and for updating and correcting information in internal EPA databases as necessary. The Agency will not make this information available for other purposes unless required by law. EPA does not sell or otherwise transfer personal information to an outside third party. [\[Federal Register: March 18, 2002 \(Volume 67, Number 52\)\]](#)[\[Page 12010-12013\]](#).

**Figure 13 - SCS Registration Home Page**

**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).

**Figure 14 – State Lab Partner/Program/Role Selection**

**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 complete the following steps:

a) Click the following link. You will need to enter the password that was selected during the registration process.  
<https://test.epacdx.net/EPASharedServicesPortal/Registration/SubmitEmailValidation?UserId=WBRI LABADMIN&Code=C4aE059e7939&RoleId=9406>

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:  
**C4aE059e7939**

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 use the portal. Please do not respond to this message. If you have questions concerning this request, you may contact us the Rhode Island Helpdesk at .

**Figure 15- SCS Verification Email with Validation Code**

**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).

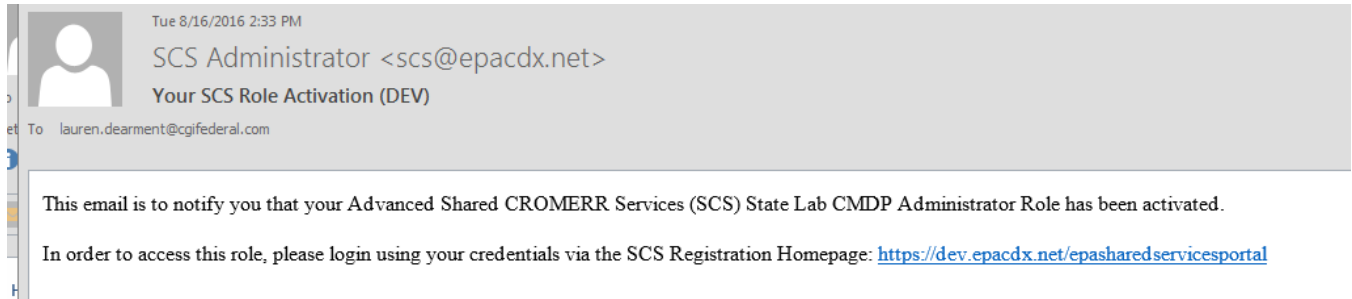
**Figure 16 - E-mail Validation Code Entry Form**

**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.

Partner	Service	Role	Org	Status
CT	CMDP	State Lab CMDP Administrator	Test CT CMDP State Laboratory Org	Awaiting Approval

**Figure 17 - State Lab Awaiting Administrator Role Activation**

**Step 12.** Once the State CMDP Administrator approves the role in SCS, the role is activated and the registrant has become an official user who may access both SCS and CMDP 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.



*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 CMDP Administrator role as “Active” in the **Dashboard**, as shown in Figure 19.



*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.

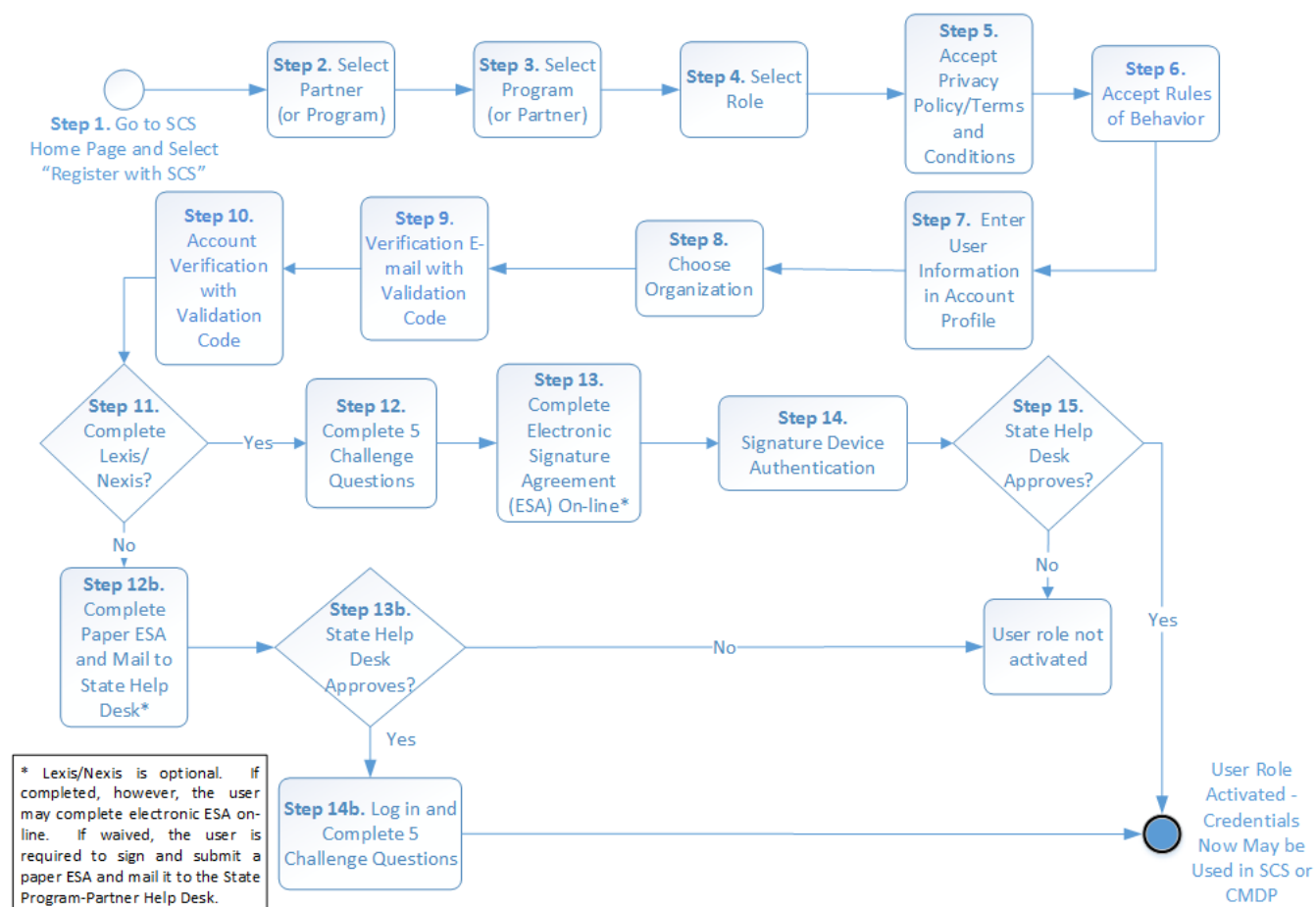


Figure 20 - PWS or Private Lab Administrator Registration Sequence



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SCS Advanced Shared Services [Contact Us](#)

Services Requested

Register By Partner Register By Program

Partner / Program / Role

Choose a Partner Kansas

Choose a Program CMDP: Compliance Monitoring Data Portal

Choose a Role PWS CMDP Administrator

Continue Cancel

*Figure 21 - PWS Administrator Partner/Program/Role Selection*

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.

The screenshot displays a web interface for selecting an organization. At the top, a blue header bar contains the text "Choose an organization". Below this, there is a search bar with the placeholder "Search for an organization" and a green "Search" button. Underneath the search bar is a section titled "Advanced Search..." which contains several input fields: "Client ID", "Mailing Address", "City", "State" (with a dropdown menu showing "Kansas"), "Country" (with a dropdown menu), and "Zip". A green "Search" button is located below these fields. Below the "Advanced Search" section, a message states: "Please search and Select an organization, if the organization search is not found, you will need to contact the Help Desk." Below this message, the search results for "LAWRENCE, CITY OF (KS2004503)" are displayed. The results include the address "6 E 6TH ST PO BOX 708Lawrence, KS US 66044-0708". Below the address, there are input fields for "Phone Number" (with the value "(202) 123-4567") and "Phone Ext" (with the value "Phone Ex"). A green "Continue" button and a blue "Cancel" button are located at the bottom right of the form. A blue link "Back to search results" is located at the bottom left of the form.

*Figure 22- Organization Information using Advanced Search*

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.

First Name William

Middle Initial

Last Name Bowman

Home Address

This field is required.

Home Address 2

City

State

Zip Code

Home Phone

Last 4 of SSN

Date of Birth

☐ I have reviewed the name presented above and I would like to proceed with LexisNexis.

[Verify](#)

[Use Paper Agreement](#)

*Figure 23- Optional On-line Lexis/Nexis Identity Assurance*

**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.

**EPA** United States Environmental Protection Agency

Home Recent Announcements

**SCS**

Contact Us  
Logged in as WBLAWRENCEPWSADMIN (Log out)  
Mail: (0)

**LexisNexis Identity Proofing Successful** X

**SCS Registration: Additional Verification**  
You are registered for a program that requires eSignature PIN Verification. Please select five (5) challenge questions and answers. The questions that you select should be questions that you can remember, but difficult for anyone else to guess.

Select 5 Challenge Questions and Answers

What is the first and middle name of your oldest sibling?	▼	
What is your favorite book?	▼	
What is your favorite hobby?	▼	
Where did you graduate from high school?	▼	
What is your favorite movie?	▼	

**Save Answers**

*Figure 24- Challenge Questions and Answers*

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.

DATE: Fri 8/19/2016 5:14 PM

SCS Administrator <scs@epacdx.net>  
eSIG-PIN Questions Answered (TEST)

To: Bowman, Will

Retention Policy: Inbox (Never) Expires: Never

You have provided answers to 5 eSIG-PIN questions on 8/19/2016 5:13:35 PM for SCS user account, WBLAWRENCEPWSADMIN.

A Dashboard Inbox message has been sent with the questions you selected.

However, for your protection, your answers are not provided. If you forget your questions or answers, you may contact the SCS Help Desk to receive an eSIG-PIN Reset Authorization Code.

If you did not provide eSIG-PIN questions and answers, please contact the SCS Help and alert them of a possible security breach of your account.

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

Shared CROMERR Services Portal

*Figure 25- E-signature PIN E-mail from SCS*

**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.

**SCS** Logged in as WBLAWRENCEPWSADMIN (Log out)  
Mail: (1)

The questions/answers have been saved. ×

### Electronic Signature Agreement

The SCS electronic signature agreement (ESA) is an agreement between yourself and SCS that will authorize your electronic signature. By signing the ESA you agree to adhere to the conditions listed on the agreement below. Once the ESA has been signed, you will be authorized to sign and/or encrypt information for your data flow. For any questions regarding the SCS ESA please contact the [SCS Help Desk](#).

#### Kansas ELECTRONIC SIGNATURE AGREEMENT

In accepting the electronic signature credential issued by the Kansas to sign electronic documents submitted to Kansas's Shared CROMERR Services (SCS), and as a representative for:

Electronic Signature Holder Company Information	
Organization Name:	LAWRENCE, CITY OF (KS2004503)
Address:	6 E 6TH ST PO BOX 708Lawrence, KS US 66044-0708
Phone Number:	(202) 123-4567
E-mail Address:	bowman.will@epa.gov
Registrant's Name:	William Bowman
SCS User Name:	WBLAWRENCEPWSADMIN

I, **William Bowman**,

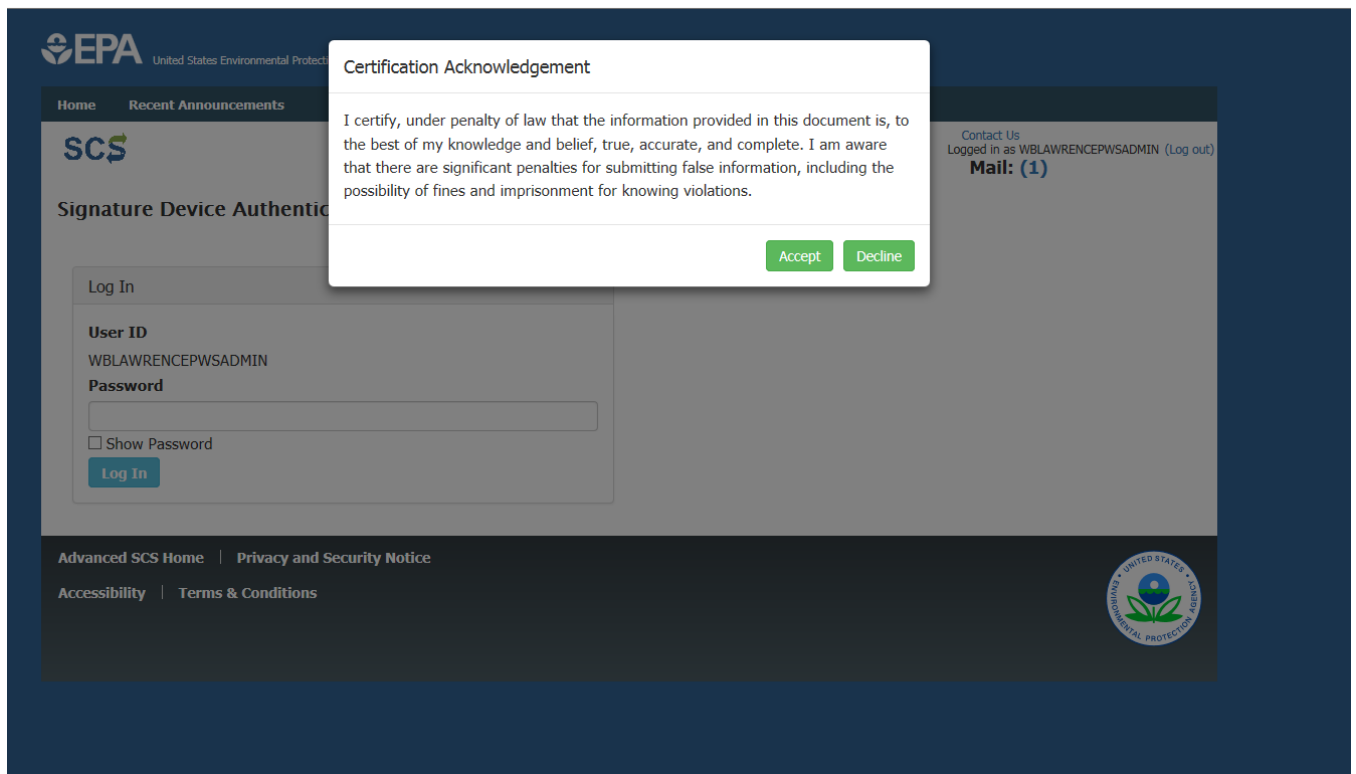
(1) Agree to protect the electronic signature credential, consisting of my Shared CROMERR Services (SCS) user identification and password, from use by anyone except me. Specifically, I agree to maintain the secrecy of the password; I will not divulge or delegate my user name and password to any other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

(2) Agree to contact the SCS Help Desk: at 202-564-3782 as soon as possible, but no later than 24 hours, after suspecting or determining that my user name and password have become lost, stolen or otherwise compromised.

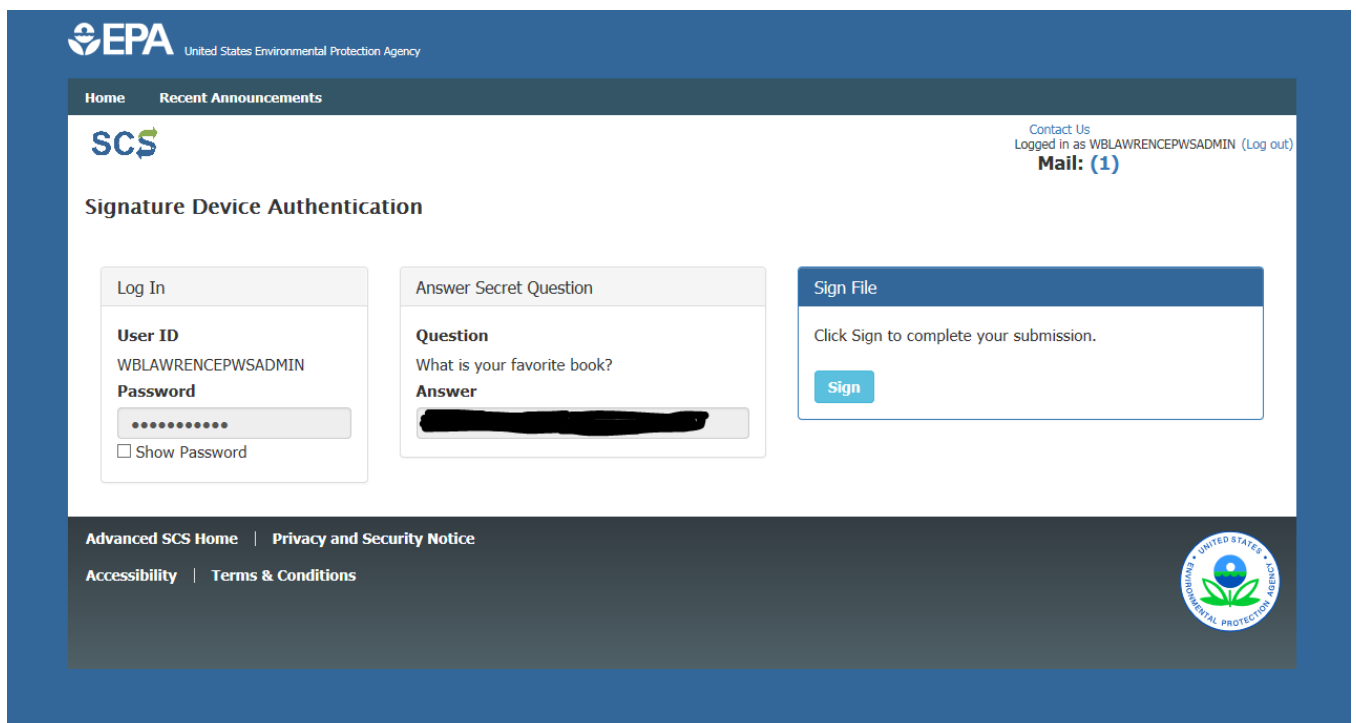
(3) I agree to notify SCS within ten working days if my duties change and I no longer need to interact with the SCS on behalf of my organization. I agree to make this notification by notifying the Kansas Technical Support staff at 202-564-3782 or [scs@epacdx.net](mailto:scs@epacdx.net).

**Sign Electronically**

**Figure 26- On-line Electronic Signature Agreement**



*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).

The screenshot displays the SCS Dashboard interface. At the top, the EPA logo and 'United States Environmental Protection Agency' are visible. Below this, a navigation bar includes 'Home' and 'Recent Announcements'. The main header area shows 'SCS / Dashboard' on the left and user information on the right: 'Contact Us', 'Logged in as WBLAWRENCEPWSADMIN (Log out)', and 'Mail: (1)'. The central content area features a 'Program Services' section with links for 'Services', 'Profile', 'Mail', and 'Submission History'. Below these links is a table with the following data:

Partner	Service	Role	Org	Status
KS	CMDP	PWS CMDP Administrator	LAWRENCE, CITY OF (KS2004503)	Awaiting Approval

Below the table, it states 'Showing 1 to 1 of 1 rows'. To the right of the table is a 'Notifications' section with a '(More)' link and the text 'No notifications'. The footer contains links for 'Advanced SCS Home', 'Privacy and Security Notice', 'Accessibility', and 'Terms & Conditions', along with the EPA seal.

**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.

The screenshot displays a registration form with the following fields and labels:

- First Name: William
- Middle Initial: [empty]
- Last Name: Bowman
- Home Address: [empty] (This field is required.)
- Home Address 2: [empty]
- City: [empty]
- State: [dropdown menu]
- Zip Code: [empty]
- Home Phone: [empty]
- Last 4 of SSN: [empty]
- Date of Birth: MM/DD/YYYY [empty]


Below the form, there is a checkbox with the text: ☐ I have reviewed the name presented above and I would like to proceed with LexisNexis.


In the bottom left corner, there are two buttons: a green 'Verify' button and a blue 'Use Paper Agreement' button, which is highlighted with a blue border.

**Figure 30 – Use Paper Agreement (ESA) Option in Lexis/Nexis Identity Assurance Screen**



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[Contact Us](#)  
Logged in as LAPWSADMIN (Log out)  
 **Mail:** (0)

### Paper SCS Electronic Signature Agreement

The SCS electronic signature agreement (ESA) is an agreement between yourself and SCS that will authorize your electronic signature. By signing the ESA you agree to adhere to the conditions listed on the agreement below. Once the ESA has been signed, you will be authorized to sign and/or encrypt information for your data flow. For any questions regarding the SCS ESA please contact the [SCS Help Desk](#).

**Louisiana**  
**ELECTRONIC SIGNATURE AGREEMENT**

In accepting the electronic signature credential issued by the Louisiana to sign electronic documents submitted to Louisiana's Shared CROMERR Services (SCS), and as a representative for:

**Electronic Signature Holder Company Information**

Organization Name:	BATON ROUGE WATER COMPANY (LA1033005)
Address:	Baton Rouge Water Company PO Box 96016Baton Rouge, LA US 70896
Phone Number:	(123) 456-7890
E-mail Address:	lauren.dearment@cgifederal.com
Registrant's Name:	Will Bowman
SCS User Name:	LAPWSADMIN

I, **Will Bowman**,

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

**Figure 31 - Paper ESA Screen**

United States

Home Recent Announcements

### Paper SCS Electronic Signature Agreement

The SCS electronic signature process allows you to sign electronic documents and agree to adhere to the SCS data flow. For any questions, please contact the SCS Help Desk at 202-564-3782.

In accepting the electronic signature credential issued by the Louisiana Shared CROMERR Services (SCS), and as a representative of your organization, I agree to the following terms and conditions:

**Electronic Signature Holder Company Information**

Organization Name:	BATON ROUGE WATER COMPANY (LA1033005)
Address:	Baton Rouge Water Company PO Box 96016Baton Rouge, LA US 70896
Phone Number:	(123) 456-7890
E-mail Address:	lauren.dearment@cgifederal.com
Registrant's Name:	Will Bowman
SCS User Name:	LAPWSADMIN

**I, Will Bowman,**

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

(2) Agree to contact the SCS Help Desk: at 202-564-3782 as soon as possible, but no later than 24 hours, after suspecting or determining that my user name and password have become lost, stolen or otherwise compromised.

(3) I agree to notify SCS within ten working days if my duties change and I no longer need to interact with the SCS on behalf of my organization. I agree to make this notification by notifying the Louisiana Technical Support staff at 202-564-3782 or scs@epacdx.net.

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


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

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


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

**Figure 32 - Printable Version of Paper ESA**

**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.


United States Environmental Protection Agency

Home
Recent Announcements

 / Dashboard


Contact Us  
Logged in as LAPWSADMIN (Log out)  
Mail: (0)

Program Services
[Services](#) | [Profile](#) | [Mail](#) | [Submission History](#)

Partner	Service	Role	Org	Status
LA	CMDP	PWS CMDP Administrator	BATON ROUGE WATER COMPANY (LA1033005)	Awaiting Electronic Signature Agreement

Showing 1 to 1 of 1 rows




Alerts


 Your LA-CMDP PWS CMDP Administrator role has not been activated. [Click here](#) to complete the process.

Notifications (More)

No notifications

Advanced SCS Home | Privacy and Security Notice  
Accessibility | Terms & Conditions









*Figure 33 - Awaiting Paper ESA Approval*

**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).

[Home](#)
[Recent Announcements](#)

 / [Dashboard](#)

[Contact Us](#)  
 Logged in as LAPWSADMIN (Log out)  
 **Mail: (1)**

The questions/answers have been saved.

Program Services

[Services](#) | [Profile](#) | [Mail](#) | [Submission History](#)

Partner	Service	Role	Org	Status
LA	CMDP	PWS CMDP Administrator	BATON ROUGE WATER COMPANY (LA1033005)	Active

Showing 1 to 1 of 1 rows

Role Sponsorship

[Role Sponsorship / Invitation](#)  
[Pending Sponsorship Requests](#)  
[Access Management](#)

Notifications

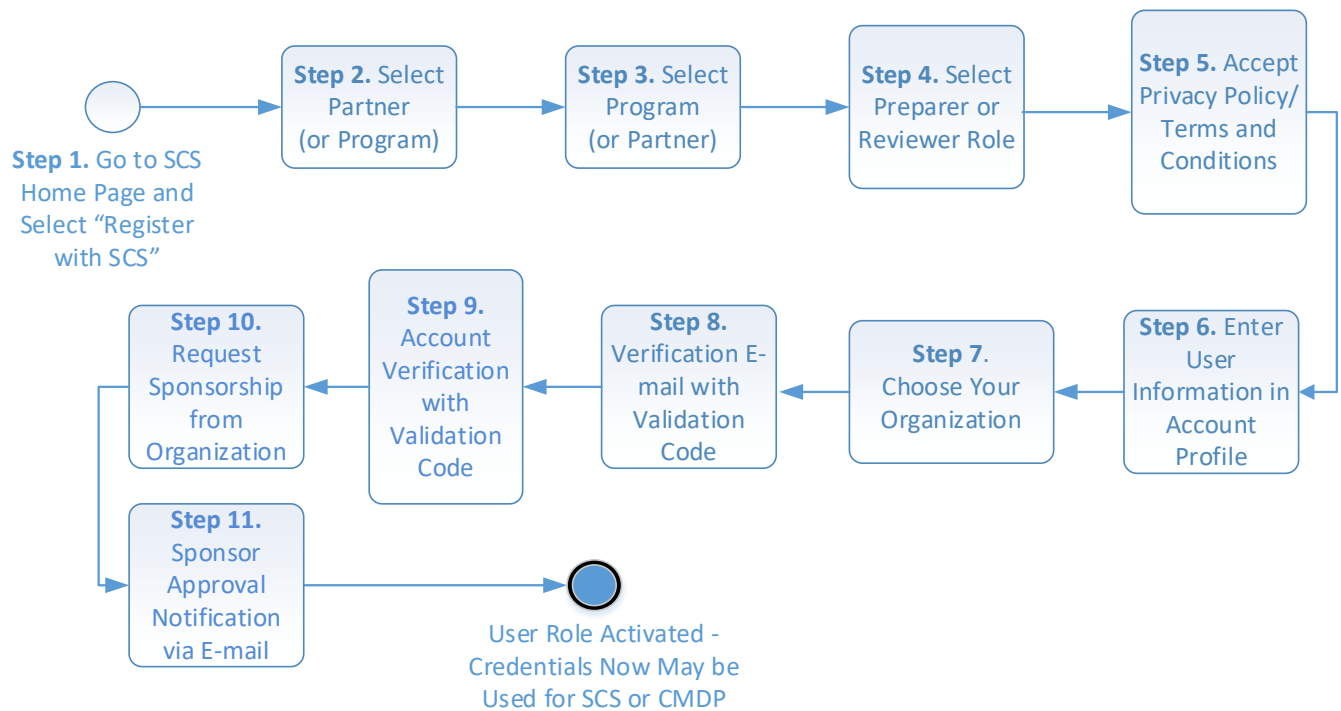
(More)

No notifications

**Figure 34 - PWS CMDP Administrator Role Activation**

## 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.



\* 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**

The screenshot shows the EPA SCS Advanced Shared Services registration interface. At the top is the EPA logo and navigation links for Home and Recent Announcements. The main header reads "SCS Advanced Shared Services" with a "Contact Us" link. Below this, there are two tabs: "Services Requested" (active) and "Register By Program". The "Services Requested" section contains three dropdown menus: "Partner / Program / Role" (with "Choose a Partner" and "Oregon" selected), "Program ID" (with "Choose a Program" and "CMDP: Compliance Monitoring Data Portal" selected), and "Role" (with "Choose a Role" and "PWS Preparer" selected). To the right of these dropdowns are "Continue" and "Cancel" buttons. A left sidebar lists various account management options: Account Profile, Account Owner, Organization Information, Email Validation, Verify Identity, and Signature Agreement. The footer contains links for Advanced SCS Home, Privacy and Security Notice, Accessibility, and Terms & Conditions, along with the EPA logo.

*Figure 36 - PWS Preparer Partner-Program-Role Selection*

**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.

The screenshot shows the EPA SCS (Superfund Community Support) interface. At the top, the EPA logo and 'United States Environmental Protection Agency' are displayed. Below this is a navigation bar with 'Home' and 'Recent Announcements'. The main header area includes the 'SCS' logo, a 'Sponsor Information' link, and user status information: 'Contact Us', 'Logged in as WBORPWSPREP (Log out)', and 'Mail: (0)'. The central form is titled 'Sponsor Information' and contains the following text: 'This role request requires sponsorship. Please provide the email address of the user you wish to sponsor you.' and a note: 'Note: This person will review your profile information in order to sponsor you.' Below the note are two input fields: 'Email' and 'Confirm Email', both containing the text 'bowman.will@epa.gov'. At the bottom right of the form are two buttons: 'Continue' (green) and 'Cancel' (grey). The footer of the page includes links for 'Advanced SCS Home', 'Privacy and Security Notice', 'Accessibility', and 'Terms & Conditions', along with the EPA seal.

EPA United States Environmental Protection Agency

Home Recent Announcements

SCS

Sponsor Information

Contact Us  
Logged in as WBORPWSPREP (Log out)  
Mail: (0)

Sponsor Information

This role request requires sponsorship. Please provide the email address of the user you wish to sponsor you.

**Note:** This person will review your profile information in order to sponsor you.

Email

Confirm Email


Continue Cancel

Advanced SCS Home | Privacy and Security Notice  
Accessibility | Terms & Conditions

UNITED STATES  
ENVIRONMENTAL PROTECTION AGENCY

*Figure 37 - Sponsorship Request*

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).


United States Environmental Protection Agency

Home
Recent Announcements

SCS
/ Dashboard

[Contact Us](#)  
Logged in as WBORPWSPREP (Log out)  
**Mail: (1)**

The request for sponsorship has been emailed.

Program Services
[Services](#) | [Profile](#) | [Mail](#) | [Submission History](#)

Partner	Service	Role	Org	Status
OR	CMDP	PWS Preparer	PORTLAND WATER BUREAU (OR4100657)	Awaiting Sponsorship

Showing 1 to 1 of 1 rows


Alerts

Your OR-CMDP PWS Preparer role requires sponsorship. [Click here](#) to complete the process.

Notifications (More)

No notifications

[Advanced SCS Home](#) | [Privacy and Security Notice](#)  
[Accessibility](#) | [Terms & Conditions](#)



**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](mailto:bowman.will@epa.gov). The details of that role that you are requesting sponsorship for are outlined below:

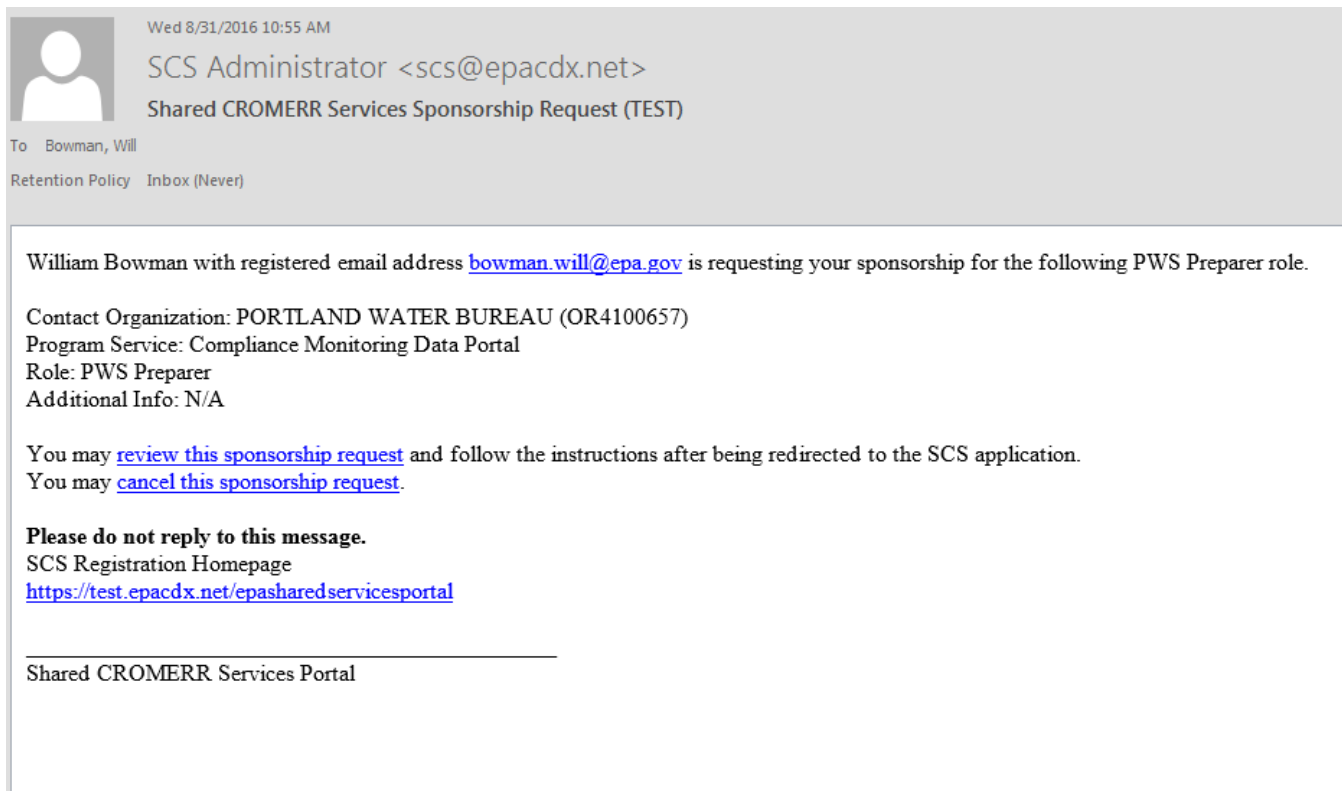
Contact Organization: PORTLAND WATER BUREAU (OR4100657)  
Program Service: Compliance Monitoring Data Portal  
Role: PWS Preparer  
Additional Info: N/A

**Please do not reply to this message.**  
SCS Registration Homepage  
<https://test.epacd.x.net/epasharedservicesportal>

Shared CROMERR Services Portal

**Figure 39 - Sponsorship Request Notification E-mail**





*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

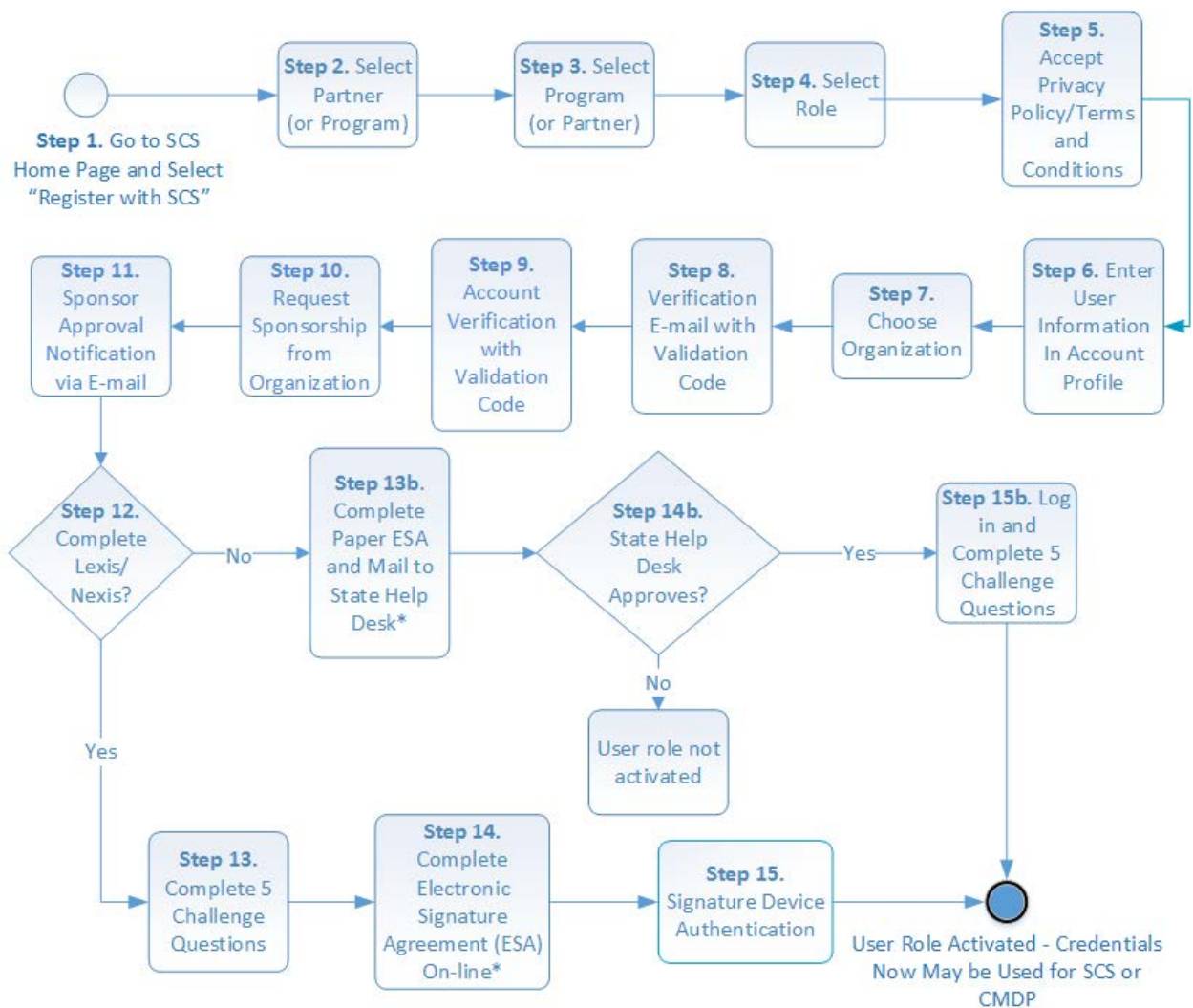
**Steps 1-9.** The Private Lab or PWS Certifier registration sequence is shown in Figure 42 below. As an open-registration role, the registrant begins by selecting *Register with SCS* button at the **SCS Home Page** and selecting the **Program, Partner and Role**. In the example in Figure 41, the registrant is requesting a Private Lab Certifier role in the State of Oregon.

The screenshot shows the EPA SCS Advanced Shared Services registration interface. At the top is the EPA logo and navigation links for Home and Recent Announcements. The main header reads 'SCS Advanced Shared Services' with a 'Contact Us' link. Below this, there are two tabs: 'Register By Partner' (selected) and 'Register By Program'. A left sidebar lists navigation options: Partner / Program / Role, Program ID, Terms & Conditions, Rules of Behavior, Account Profile, Account Owner, Organization Information, Email Validation, Verify Identity, and Signature Agreement. The main content area shows three selection steps: 'Choose a Partner' with 'Oregon' selected, 'Choose a Program' with 'CMDP: Compliance Monitoring Data Portal' selected, and 'Choose a Role' with 'Private Lab Certifier' selected. 'Continue' and 'Cancel' buttons are at the bottom right. The footer contains links for Advanced SCS Home, Privacy and Security Notice, Accessibility, and Terms & Conditions, along with the EPA seal.

**Figure 41- Partner-Program-Role Registration for Private Lab Certifier**

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.

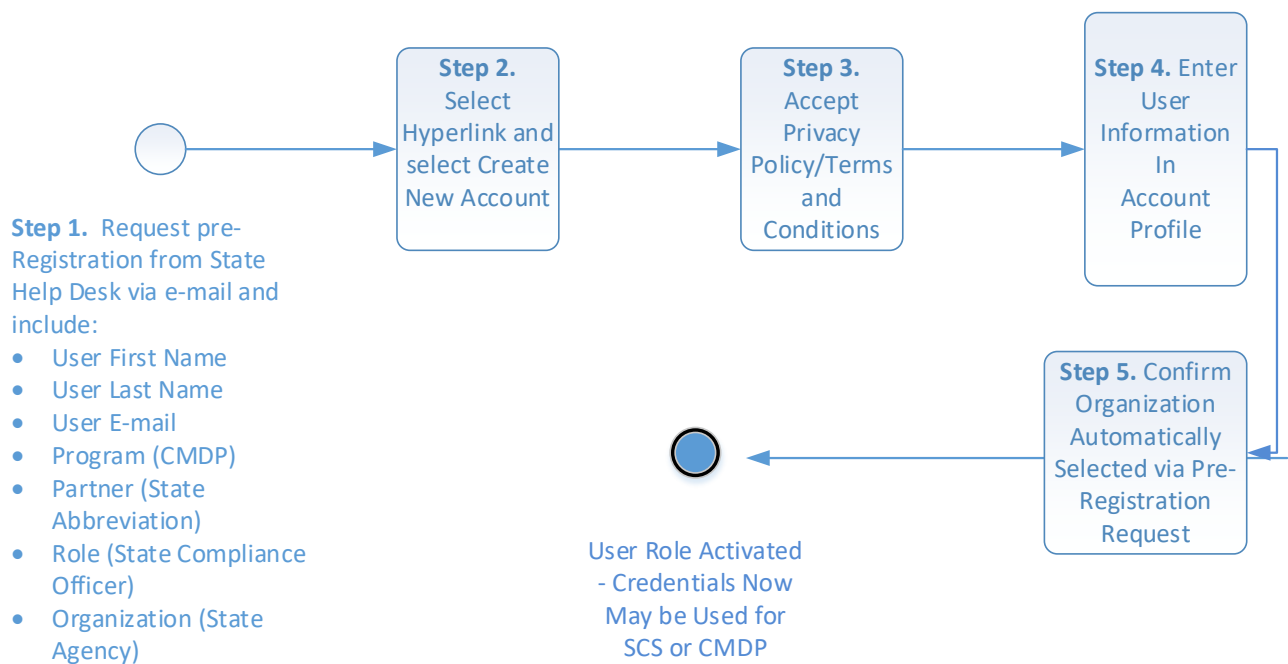


**Figure 42 - Private Lab or PWS Certifier Registration Sequence**

**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.



**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, 11:04 AM  
Bowman, Will



Reply all

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=8FCF98be521A>

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**

**EPA** United States Environmental Protection Agency

Home Recent Announcements

**SCS** Advanced Shared Services [Contact Us](#)

An SCS user account has been created for you by an authorized SCS user with basic user and organization information. If you wish to re-use an existing account, please select a user ID and log in with your existing credentials. If you wish to create a new account, click the [Create New Account] hyperlink.

**Note:** Logging in with your existing credentials will add the program information to your user profile.


User ID

Password

[Log In](#) [Create New Account](#)

[Advanced SCS Home](#) | [Privacy and Security Notice](#)

[Accessibility](#) | [Terms & Conditions](#)



*Figure 45 - SCS Create Account Screen*

**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.

The screenshot displays the EPA SCS Dashboard. At the top, the EPA logo and 'United States Environmental Protection Agency' are visible. Below the navigation bar, the 'Recent Announcements' section is present. The main content area is titled 'SCS / Dashboard'. On the right, there are links for 'Contact Us', 'Logged in as WBLACOMPOFF (Log out)', and 'Mail: (0)'. The 'Program Services' section features a table with the following data:

Partner	Service	Role	Org	Status
LA	CMDP	State Compliance Officer	LOUISIANA	Active

Below the table, it states 'Showing 1 to 1 of 1 rows'. To the right of the table is a 'Notifications' box with the text 'No notifications' and a '(More)' link. Below the table is an 'Admin Tools' section with a link for 'CROMERR Administration'. The footer contains links for 'Advanced SCS Home', 'Privacy and Security Notice', 'Accessibility', and 'Terms & Conditions', along with the EPA logo.

**Figure 46 - State Compliance Officer Role Activation**

### 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**

Organization type / Role type	Requires Lexis Nexis or Paper ESA Identity Assurance	Identity Assurance Score	2 factor sign and ESA	Partner Terms and Conditions	Rules of Behavior	Sponsor /Can Approve Sponsored Roles	Requires Sponsorship	Open Registration (ask through SCS) or Closed Registration (ask Help Desk directly)	Requires Approval
<b>Commercial/Private Lab (Org type = CMDP Private Laboratory)</b>									
Private Lab CMDP Administrator	Yes	CROMERR Minimum	Yes	Yes	Yes	Yes	No	Open	Yes
Private Lab Certifier	Yes	CROMERR Minimum	Yes	Yes	No	No	Yes	Open	No
Private Lab Reviewer	No	No	No	Yes	No	No	Yes	Open	No
Private Lab Preparer	No	No	No	Yes	No	No	Yes	Open	No
<b>Water Utility ( Org type = Public Water System)</b>									
PWS CMDP Administrator	Yes	CROMERR Minimum	Yes	Yes	Yes	Yes	No	Open	Yes
PWS CMDP Certifier	Yes	CROMERR Minimum	Yes	Yes	No	No	Yes	Open	No
PWS CMDP Reviewer	No	No	No	Yes	No	No	Yes	Open	No
PWS CMDP Preparer	No	No	No	Yes	No	No	Yes	Open	No
<b>State Laboratory (Org type = CMDP State Laboratory)</b>									
State Lab CMDP Administrator	No	No	No	Yes	Yes	Yes	No	Open	Yes
State Lab Submitter	No	No	No	Yes	No	No	Yes	Open	No
State Lab Reviewer	No	No	No	Yes	No	No	Yes	Open	No
State Lab Preparer	No	No	No	Yes	No	No	Yes	Open	No
<b>Primacy Agency</b>									
State CMDP Administrator	No	No	No	Yes	Yes	No	No	Closed	No
State Compliance Officer	No	No	No	Yes	Yes	No	No	Closed	No



**Table 2 – Summary of Partner-Program Help Desk Functionality in SCS**

SCS Functionality Group and Function		Role Name		
		Central Helpdesk	Partner Helpdesk *	Partner Program Helpdesk **
User Management	Has General Access	Y	Y	Y
	Search Users	Y	Y	Y
	Search Results	Y	Y	Y +
	User Details	Y	Y	Y
	Reset Password	Y	Y	N
	View User's Inbox	Y	Y	N
	<b>User Account Information</b>			
	View Password Expiration Date	Y	Y	N
	Security Questions - View/Edit	Y	Y	N
	Security Questions - Edit	Y	Y	N
	User ID edit	N	N	N
	Name Edit	Y	Y	Y
	Electronic Score Index	Y	Y	N
	Paper Score Index	Y	Y	Y
	Lock Account	Y	Y	N
	Unlock Password	Y	Y	N
	Reset 20-5-1	Y	N	N
	<b>User Organization Information</b>			
	Edit Org Email	Y	N	N
	Edit Org Contact Info (Phone etx)	Y	Y	Y
	Assign Primary Organization	Y	N	N
	Change ESA Status	Y	Y	Y
	<b>Program Flow Information</b>			
	Activate Role	Y	Y	Y
	Deactivate Role	Y	Y	Y
	Approve ESA	Y	Y	Y
	Deny ESA	Y	Y	Y
	Add Program Service	Y	Y	Y
	Add Role	Y	Y	Y
Pending Requests	Has General Access	Y	Y	Y
	Search	Y	Y	Y
	Search Results	Y	Y	Y
	Approve Roles	Y	Y	Y
	Reject Roles	Y	Y	Y
Pre-Registration	Has General Access	Y	Y	Y
	Search Existing	Y	Y	Y
	Expire CRK	Y	Y	Y
	ReActivate CRK	Y	Y	Y
	View CRK Details	Y	Y	Y
	Create New CRK	Y	Y	Y
	Supress CRK Email	Y	Y	Y
Alert Publishing	Has General Access	Y	Y	Y
	Create/Search/Unpublish Email	Y	N	N
	Create/Search/Unpublish MySCS	Y	Y	Y
	Create/Search/Unpublish Recent Announcement	Y	N	N
	Create/Search/Unpublish Home Page	Y	N	N
	Search Alerts	Y	Y	Y
	Unpublish Alerts	Y	Y	Y
Theme	Has General Access	Y	N	N
	Create New Theme	Y	N	N
	Edit theme	Y	N	N
CROMERR Admin	Has General Access	Y	Y	N
	Search Submissions	Y	Y	N
	View Submissions	Y	Y	N
	Update COR Status	Y	Y	N