

SHARED CROMERR SERVICES  
ROLE REGISTRATION GUIDE FOR  
NORTH CAROLINA  
CERTIFIED LABORATORIES USING CMDP

ADAPTED FROM: COMPLIANCE MONITORING DATA PORTAL  
ROLE REGISTRATION USER GUIDE USING SHARED  
CROMERR SERVICES (SCS), PREPARED BY EPA

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## Acronyms and Definitions

Acronym	Definition
EPA	Environmental Protection Agency
CMDP	Compliance Monitoring Data Portal
SDWIS	Safe Drinking Water Information System
CROMERR	Cross-Media Electronic Reporting Rule
LIMS	Laboratory Information Management System
NPDWRs	National Primary Drinking Water Regulations
PWS	Public Water System
R/O/CR	Required/Optional/Conditionally Required
SDWA	Safe Drinking Water Act
SCS	Shared CROMERR Services
UI	User Interface

### 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 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.

	<b>Administrative Roles</b>	<b>Non-Administrative Roles</b>
<b>Submitter Organization</b>	<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
<b>State Organization</b>	<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 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 via a pre-registration request to the SCS Partner Help Desk. 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.

#### 1.7 – SCS Account Password

- **Passwords for SCS account must be changed every 90 days.**

## Approval Sequence for CMDP Role Registration in SCS

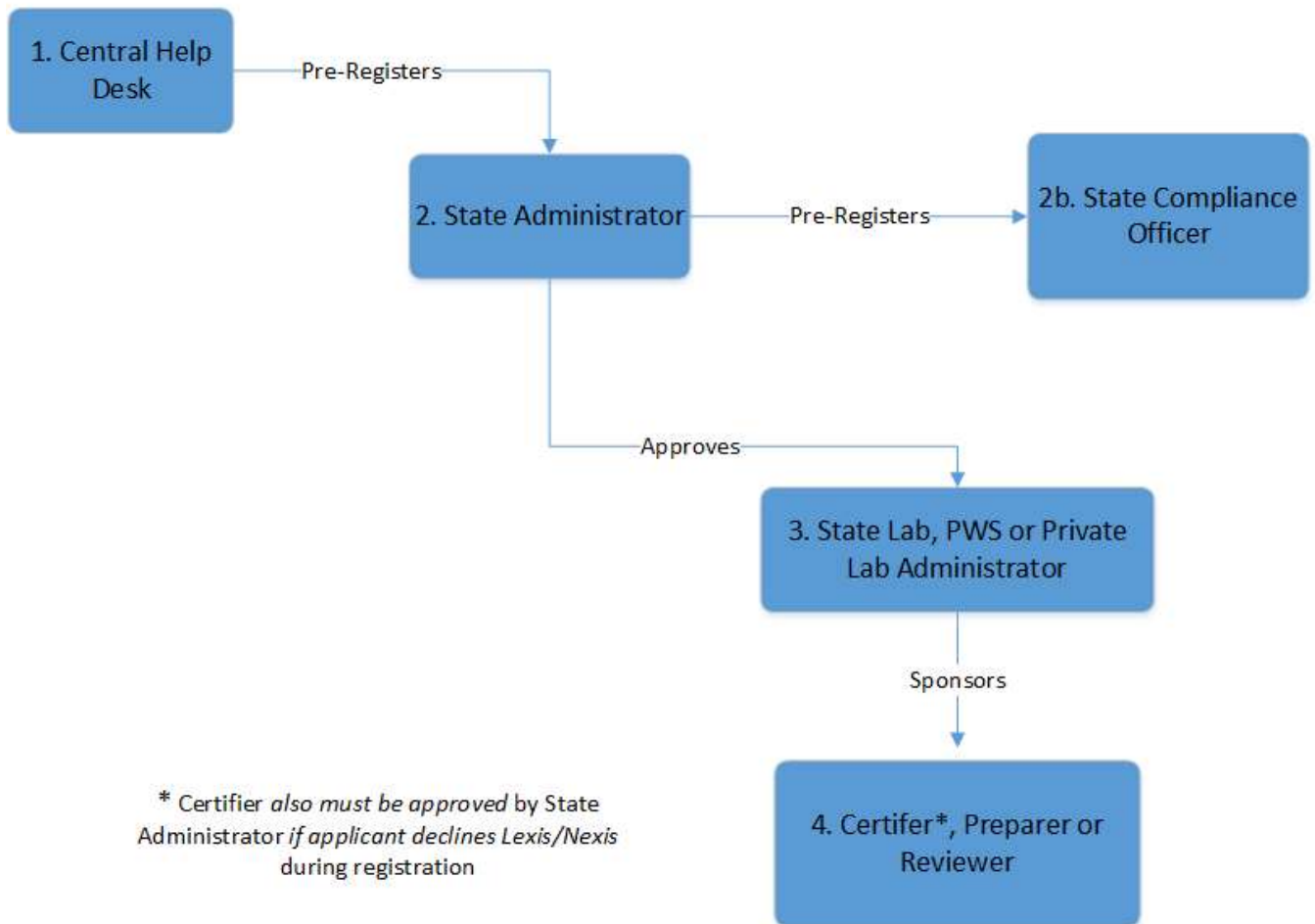


Figure 3- Approval Sequence for CMDP Role Registration in SCS

### 2.3 - Private Lab or PWS CMDP Administrator (Sponsor) Registration Sequence-

Unlike the State CMDP Administration role, which is obtained through closed registration, the 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 4 below) and selects the Register with SCS button (Figure 5). The registrant then completes the Program/Partners/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 Organizational Information form, receives the Verification E-mail, and enters the code into the Validation Code Entry Form.

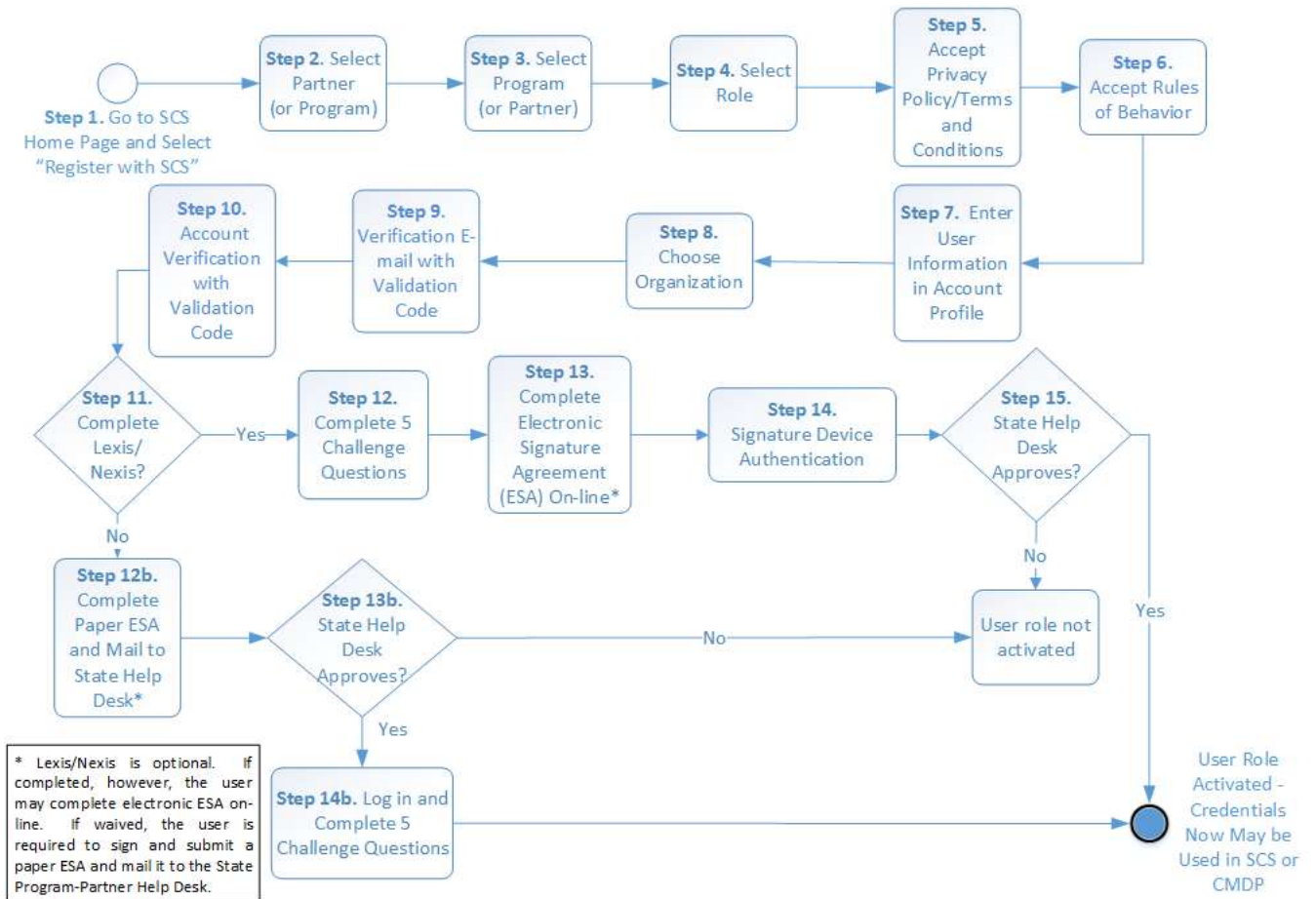


Figure 4 - PWS or Private Lab Administrator Registration Sequence



**Step 1:** Go to the SCS Registration Home Page (<https://encromerr.epa.gov>) and select the Register with SCS button (Figure 5).

**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.

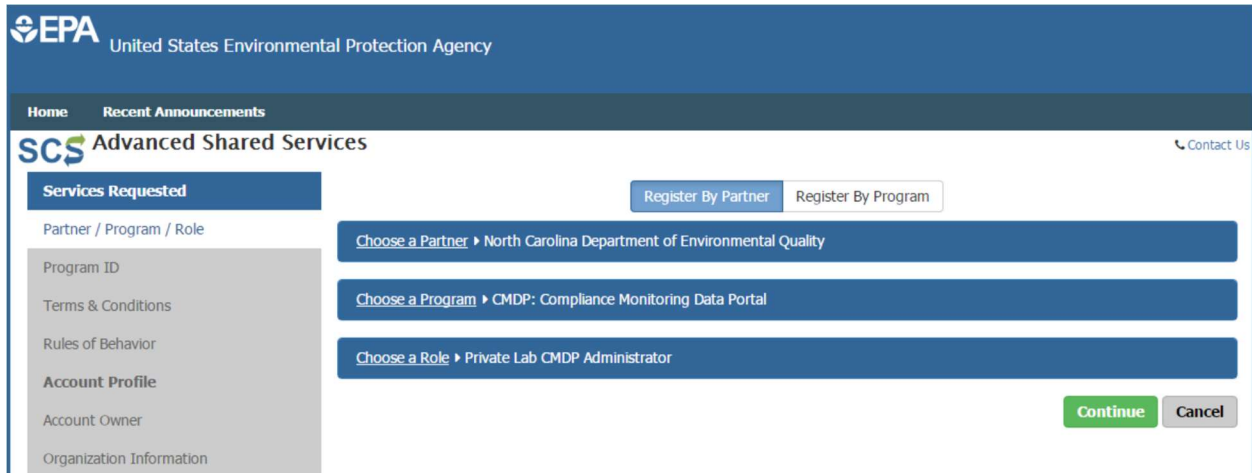
**Warning Notice and Privacy Policy**

**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].

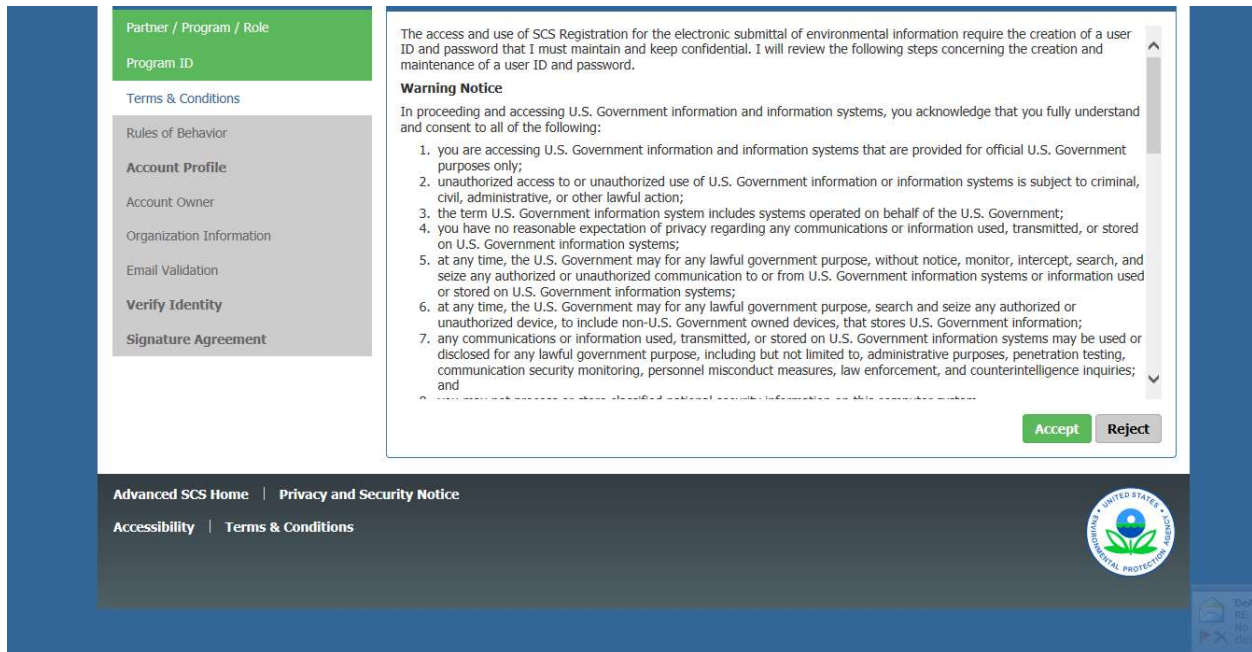
**Figure 5 - SCS Registration Home Page**

**Steps 2-4.** The registrant then uses the pick list prompts to select **Partner** (North Carolina Department of Environmental Quality), **Program** (CMDP) and **Role** (Private Lab CMDP Administrator) and clicks the *Continue* button (Figure 6).



**Figure 6 – State Lab Partner/Program/Role Selection**

**Step 5.** After clicking *Continue* from the **Partner/Program/Role** screens, the registrant will see the **Privacy Policy/Terms and Conditions** screen as shown in Figure 7. After reviewing, the registrant will click the Accept button.



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

**Step 6.** After selecting the *Accept* button, the user will see the **Rules of Behavior** screen for review as shown in Figure 8. After reviewing, the registrant will click the *Accept* button.

**SCS** Advanced Shared Services Contact Us

**Services Requested**

- Partner / Program / Role
- Program ID
- Terms & Conditions
- Rules of Behavior

**Account Profile**

- Account Owner
- Organization Information
- Email Validation
- Verify Identity
- Signature Agreement


Read and accept State CMDP Administrator's Rules of Behavior

## RULES OF BEHAVIOR FOR ACCESSING CDX'S SCS REGISTRATION MAINTENANCE and ACCOUNT MANAGEMENT

The Shared CROMERR Services (SCS) system within the Environmental Protection Agency's Central Data Exchange (CDX) provides Registration Maintenance Account Manager (RMAM) users the ability to access Compliance Monitoring Data Portal (CMDP) end user registration data stored in SCS in order to grant and assign access rights and roles to CMDP users. Each RMAM user shall be authorized and assigned by specific dataflow, specific dataflow access right, and specific dataflow role their particular RMAM privileges within the Registration Maintenance dataflow for granting CMDP users access privileges.

All RMAM users shall abide by the following RMAM Rules of Behavior to ensure that CDX, the Registration Maintenance dataflow, and registration data are protected from loss, misuse, or unauthorized access to or modification of, the information in the SCS system or Registration Maintenance dataflow. SCS registration data requires a robust level of protection as it includes an individual user's name, self- assigned user name and security question, work title, work address, work contact information (e.g., phone and fax numbers, E-mail address), supervisor's name and other personal contact information. Depending upon the specific SCS dataflow(s) to which an end user has access privileges, registration data may also additionally include such items from an individual as date of birth, mother's maiden name, high school graduation date, and similar personal identifiers.

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



*Figure 8 – Rules of Behavior*

**Step 7.** 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.

The password for your SCS account must be changed every 90 days.

The screenshot shows a web form titled "Create your user information". On the left is a navigation menu with items: Services Requested, Partner / Program / Role, Program ID, Terms & Conditions, Rules of Behavior, **Account Profile** (highlighted), Account Owner, Organization Information, Email Validation, Verify Identity, and Signature Agreement. The main content area is divided into two sections:

**Account Owner**

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 (\*).

Fields in the Account Owner section:

- Title: dropdown menu
- First Name \*: text input with "William"
- Middle Initial: text input with "Middle Initial"
- Last Name \*: text input with "Bowman"
- Suffix: dropdown menu with "Suffix"
- Email Address \*: text input with "bowman.will@epa.gov"

**Account**

Fields in the Account section:

- User ID \*: text input (empty), with error message "This field is required."
- Password \*: text input (empty), with error message "1. The password may only contain letters and numbers. This field is required."
- Confirm Password \*: text input (empty)
- Security Question 1 \*: dropdown menu with "What was your childhood nickname?"
- Security Answer 1 \*: text input (empty)
- Security Question 2 \*: dropdown menu with "What street did you live on in third grade?"
- Security Answer 2 \*: text input (empty)
- Security Question 3 \*: dropdown menu with "What school did you attend for sixth grade?"
- Security Answer 3 \*: text input (empty)

**Figure 9 – Account Profile**

**Step 8.** After the adding Account Owner information, the registrant will complete the **Organization Information**. To ensure that you select the correct organization, type your 5-digit lab ID into the search box. Your organization name should have your 5-digit lab number in parenthesis after your organization’s name. If you have issues finding your organization, please contact the NC Public Water Supply Section.

The screenshot shows a web interface titled "Choose an organization". At the top, there is a search bar with the placeholder text "Search for an organization" and a green "Search" button. Below this is an "Advanced Search..." section with several input fields: "Client ID", "Mailing Address", "City", "State" (set to "Kansas"), "Country", and "Zip". A green "Search" button is located below these fields. A message below the search fields reads: "Please search and Select an organization, if the organization search is not found, you will need to contact the Help Desk." Below the message, a search result is displayed: "LAWRENCE, CITY OF (KS2004503)" in bold, with the address "6 E 6TH ST PO BOX 708Lawrence, KS US 66044-0708" below it. Further down, there are fields for "Phone Number" (containing "(202) 123-4567") and "Phone Ext" (containing "Phone Ex"). At the bottom left, there is a link "Back to search results". At the bottom right, there are two buttons: a green "Continue" button and a blue "Cancel" button.

*Figure 10- Organization Information using Advanced Search*

In this test example, the user searched for the 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.

**Step 9.** Once the **Organization Information** is correct, SCS will end the registrant a Verification E-mail containing a validation code (see Figure 11 below). The user must check the e-mail account used during open registration to view the e-mail containing the validation code, as shown in the highlighted area of Figure 11 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

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=WBRLABADMIN&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:

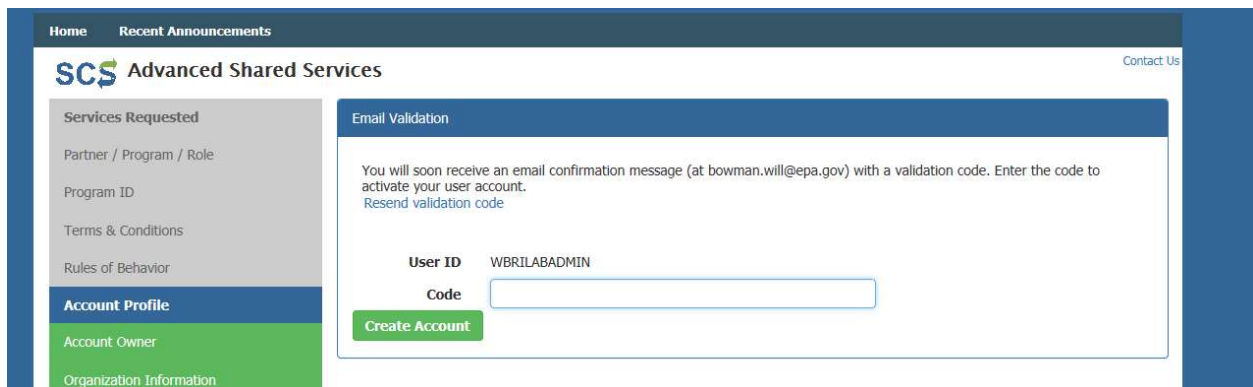
**C4aE059e7939**

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

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

**Figure 11- 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 12 below).



**Figure 12 - E-mail Validation Code Entry Form**

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 13 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	<input type="text"/>
	<small>This field is required.</small>
Home Address 2	<input type="text"/>
City	<input type="text"/>
State	State <input type="button" value="v"/>
Zip Code	<input type="text"/>
Home Phone	<input type="text"/>
Last 4 of SSN	SSN4
Date of Birth	MM/DD/YYYY

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

[Use Paper Agreement](#)

**Figure 13 - PWS Administrator Partner/Program/Role Selection**

**Step 12.** If the **Lexis/Nexis Identity Assurance** results are successful, the registrant is directed to the **Challenge Questions and Answers** (Figure 14). 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.

The screenshot shows the EPA SCS registration interface. At the top, there is a navigation bar with 'Home' and 'Recent Announcements'. The main header includes the EPA logo and 'United States Environmental Protection Agency'. Below this, the SCS logo is displayed. On the right side, there is a user status area: 'Contact Us', 'Logged in as WBLAWRENCEPWSADMIN (Log out)', and 'Mail: (0)'. A green banner at the top of the main content area reads 'LexisNexis Identity Proofing Successful'. Below this, the section is titled 'SCS Registration: Additional Verification' with the instruction: '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.' The section is titled 'Select 5 Challenge Questions and Answers' and contains five rows of questions, each with a dropdown menu and a text input field for the answer:

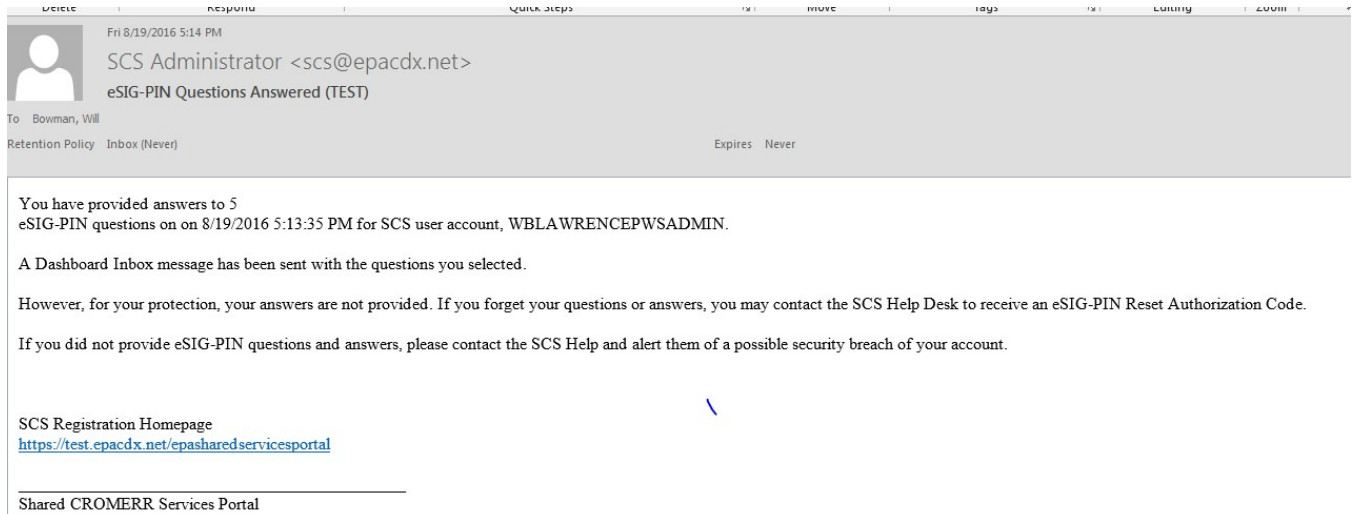
What is the first and middle name of your oldest sibling?	▼	<input type="text"/>
What is your favorite book?	▼	<input type="text"/>
What is your favorite hobby?	▼	<input type="text"/>
Where did you graduate from high school?	▼	<input type="text"/>
What is your favorite movie?	▼	<input type="text"/>

At the bottom left of the form area, there is a green button labeled 'Save Answers'.

*Figure 4- Challenge Questions and Answers*



**Step 13.** 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 15, and will be redirected to the **Electronic Signature Agreement (ESA)** screen as shown in Figure 16. 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 14) of this role registration sequence.



*Figure 5- E-signature PIN E-mail from SCS*

After the registrant reviews the contents of the **On-line Electronic Signature Agreement** (on-line ESA in Figure 16 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 17).

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 16 – Online Electronic Signature Agreement

**Step 14.** After selecting *Accept* from the **Certification Acknowledgement** pop-up window, (Figure 17), the user is redirected to the **Signature Device Authentication** screen (Figure 18).

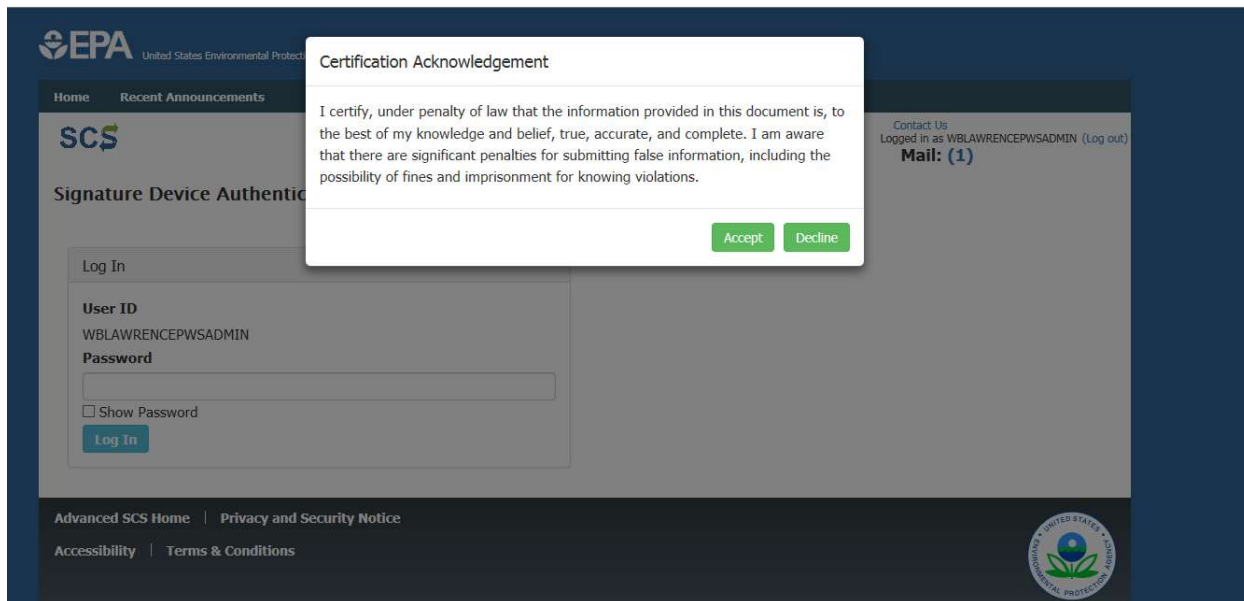


Figure 17- ESA Certification Acknowledgement "Pop-Up" Window

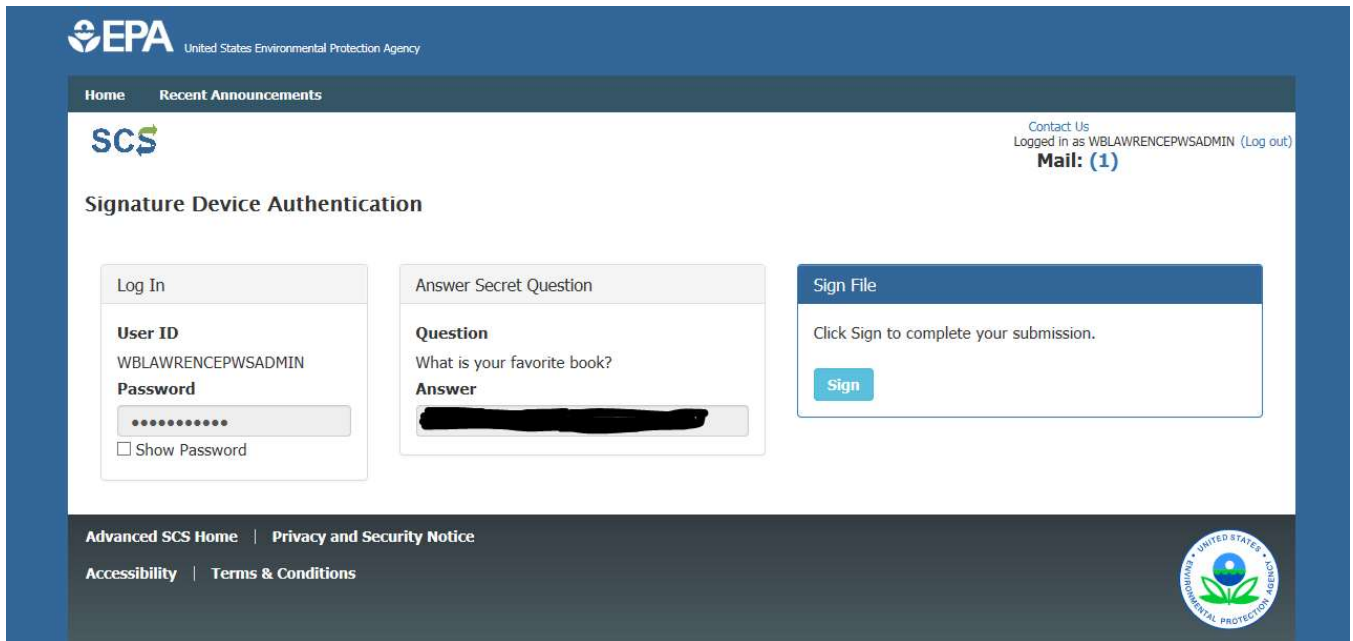


Figure 18 - Signature Device Authentication

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 18). 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**.

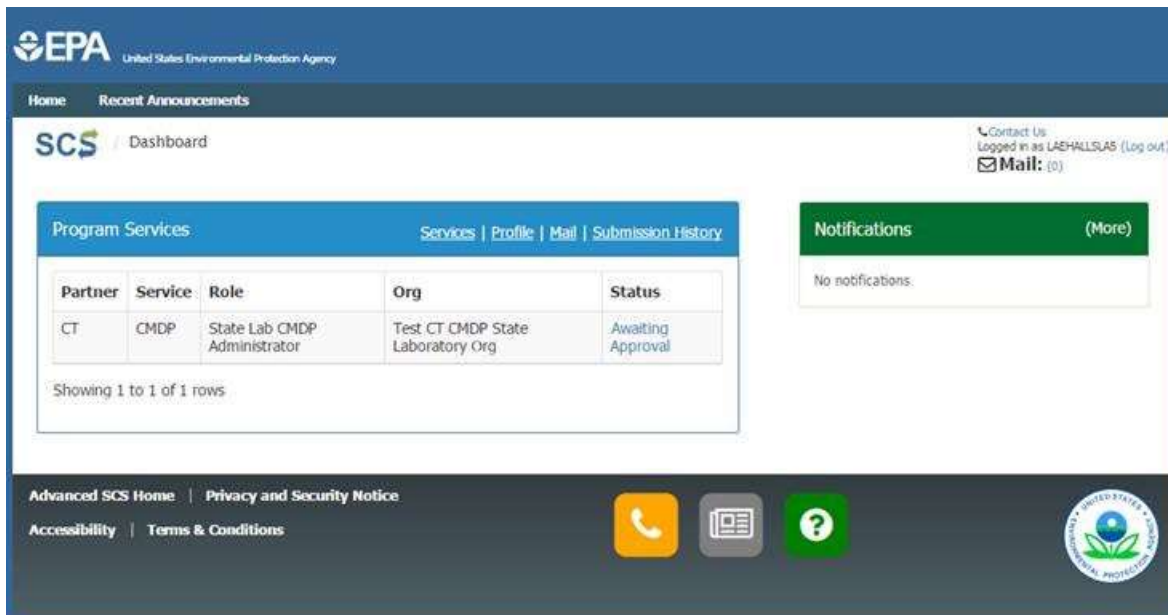
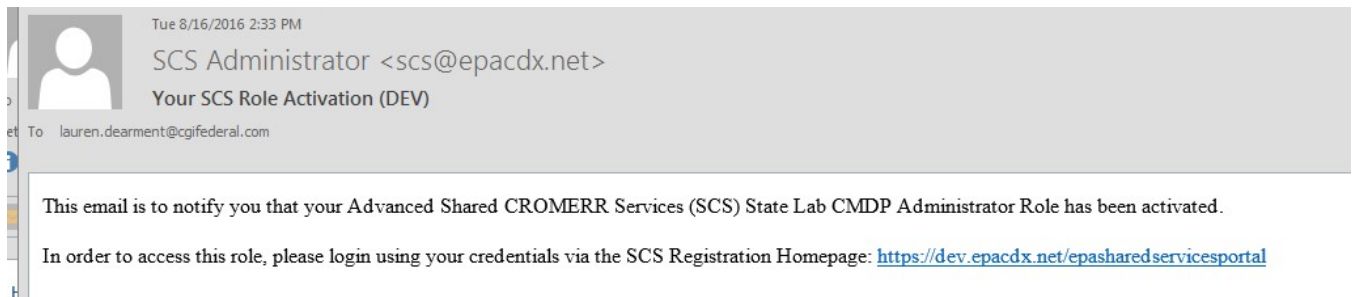
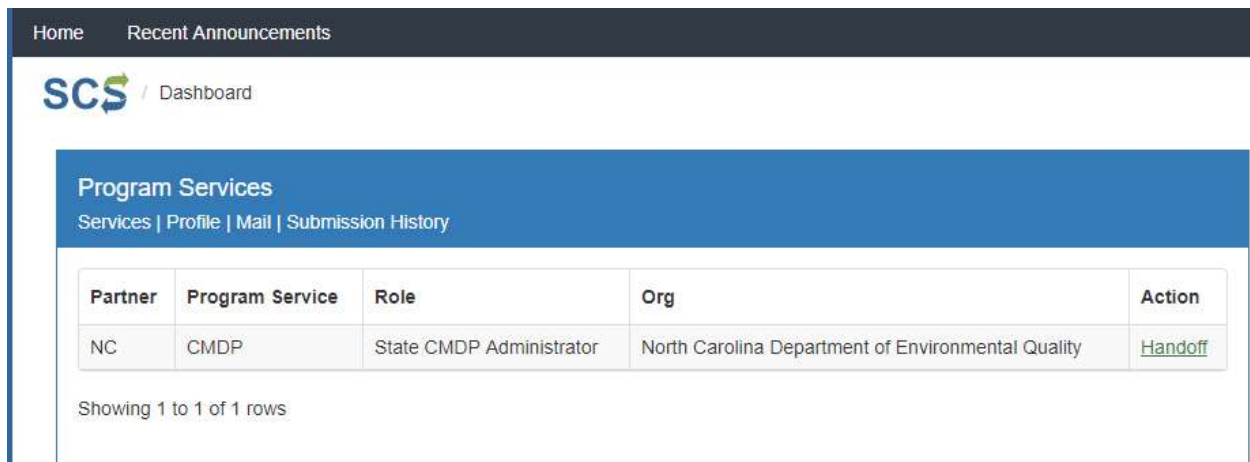


Figure 6- Lab Administrator Awaiting Role Activation

**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 19. Once the State CMDP Administrator approves this account, the registrant will receive a role activation e-mail from SCS (see Figure 20), and the approval status in the user’s Dashboard will change to “Handoff” (see Figure 21).



**Figure 20 - Role Activation E-mail** Handoff



**Figure 7- Dashboard View of Activated Lab Administrator Role**

**Step 12b.** As noted in the PWS or Private Lab Administrator registration sequence (Figure 4 above), if the Private Lab 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 20 below), which changes the sequence.

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

- First Name: William
- Middle Initial: (empty)
- Last Name: Bowman
- Home Address: (empty, with a red border and the message "This field is required.")
- Home Address 2: Home Address 2
- City: City
- State: State (dropdown menu)
- Zip Code: Zip Code
- Home Phone: Home Phone
- Last 4 of SSN: SSN4
- Date of Birth: MM/DD/YYYY

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. The "Use Paper Agreement" button is highlighted with a blue border.

**Figure 8 – Use Paper Agreement (ESA) Option in Lexis/Nexis Identity Assurance Screen**

After selecting the *Use Paper Agreement* option, the registrant may view (scroll through) the **Paper ESA screen** as shown in Figure 21 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 22). 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.

Home Recent Announcements

SCS

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

Sign Paper Form Cancel

*Figure 21 - Paper ESA Screen*

Print to Mail Close

**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 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 22 - Printable Version of Paper ESA**

**Step 13b.** As shown in Figure 23, the registrant seeking a 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.

The screenshot shows the SCS Dashboard interface. At the top, there is a navigation bar with 'Home' and 'Recent Announcements'. The user is logged in as 'LAPWSADMIN'. The main content area is titled 'Program Services' and contains a table with the following data:

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

Below the table, it says 'Showing 1 to 1 of 1 rows'. To the right of the table, there is an 'Alerts' section with a red header and a message: 'Your LA-CMDP PWS CMDP Administrator role has not been activated. Click here to complete the process.' Below the alerts is a 'Notifications' section with a green header and the text 'No notifications'.

*Figure 23 - 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 14 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 24).

The screenshot shows the SCS Dashboard interface after role activation. At the top, there is a navigation bar with 'Home' and 'Recent Announcements'. The user is logged in as 'LAPWSADMIN'. A green notification banner at the top reads: 'The questions/answers have been saved.' The main content area is titled 'Program Services' and contains a table with the following data:

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

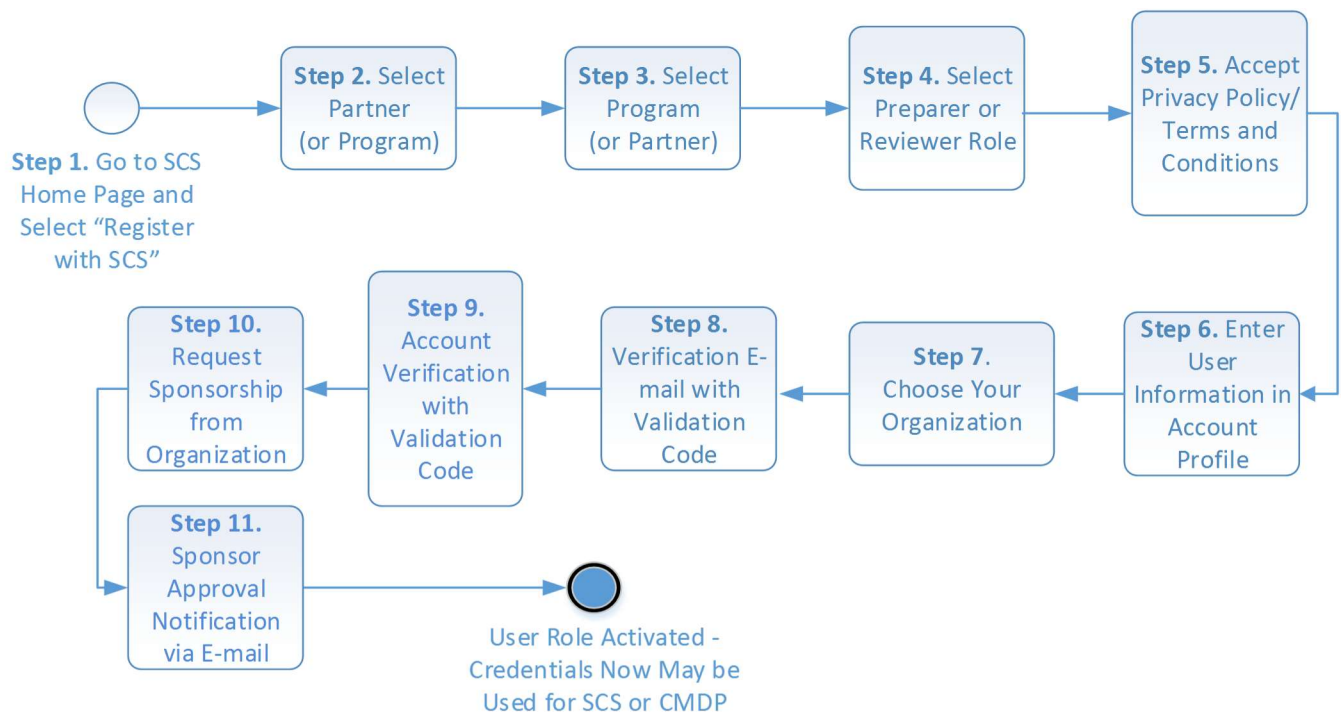
Below the table, it says 'Showing 1 to 1 of 1 rows'. To the right of the table, there is a 'Notifications' section with a green header and the text 'No notifications'.

*Figure 9 - PWS CMDP Administrator Role Activation*



## 2.4 – Private Lab Preparer, Reviewer, and State Lab Submitter Registration Sequence

**Steps 1-9.** As shown in Figure 25, the registrant for a Preparer, Reviewer or State Lab Submitter role follows a registration sequence that is common to *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.



\* 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 10 - SCS Registration Sequence for Preparers, Reviewers and State Lab Submitters**

In the example in Figure 26 below, the registrant is requesting a role as a PWS Preparer in the State of Oregon.

The screenshot shows the EPA SCS Advanced Shared Services registration interface. At the top, the EPA logo and 'United States Environmental Protection Agency' are visible. Below the logo, there are navigation links for 'Home' and 'Recent Announcements'. The main header reads 'SCS Advanced Shared Services' with a 'Contact Us' link on the right. A sidebar on the left lists 'Services Requested' and various account management options like 'Partner / Program / Role', 'Program ID', 'Terms & Conditions', 'Rules of Behavior', 'Account Profile', and 'Account Owner'. The main content area features three blue selection bars: 'Choose a Partner' with 'Oregon' selected, 'Choose a Program' with 'CMDP: Compliance Monitoring Data Portal' selected, and 'Choose a Role' with 'PWS Preparer' selected. Above these bars are two buttons: 'Register By Partner' (active) and 'Register By Program'. At the bottom right of the selection area are 'Continue' and 'Cancel' buttons.

Figure 11 - PWS Preparer Partner-Program-Role Selection

**Step 10.** 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. 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 27). 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 'Sponsor Information' form within the EPA SCS system. The header includes the EPA logo and 'United States Environmental Protection Agency'. Navigation links for 'Home' and 'Recent Announcements' are present. The main header reads 'SCS' with 'Contact Us', 'Logged in as WBORPWSPREP (Log out)', and 'Mail: (0)' on the right. The page title is 'Sponsor Information'. The form content includes a blue header 'Sponsor Information', a message: '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 'Continue' and 'Cancel' buttons.

Figure 12 - Sponsorship Request

After selecting the *Continue* button, the registrant may view the status of their role registration in the **SCS Dashboard** (Figure 28), and he or she also will receive an e-mail from SCS (Figure 29). Concurrently with the registrant, the PWS CMDP Administrator for the organization (in this example, Portland Water Bureau) will receive an e-mail notification (Figure 30).

The screenshot shows the SCS Dashboard interface. At the top, there is a navigation bar with 'Home' and 'Recent Announcements'. The main header includes the EPA logo and 'United States Environmental Protection Agency'. Below this, there are links for 'Contact Us', 'Logged in as WBORPWSPREP (Log out)', and a notification 'Mail: (1)'. A green banner at the top of the dashboard area states 'The request for sponsorship has been emailed.' Below this, there is a section for 'Program Services' with a table of roles and a 'Status' column. To the right, there is an 'Alerts' section with a message about sponsorship requirements and a 'Notifications' section showing 'No notifications'.

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

Showing 1 to 1 of 1 rows

**Figure 13 – 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.epacdx.net/epasharedservicesportal>

Shared CROMERR Services Portal

**Figure 14 - Sponsorship Request Notification E-mail**



Wed 8/31/2016 10:55 AM

SCS Administrator <scs@epacdx.net>

Shared CROMERR Services Sponsorship Request (TEST)

To Bowman, Will

[Retention Policy](#) [Inbox \(Never\)](#)

William Bowman with registered email address [bowman.will@epa.gov](mailto:bowman.will@epa.gov) is requesting your sponsorship for the following PWS Preparer role.

Contact Organization: PORTLAND WATER BUREAU (OR4100657)

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/epasharedservicesportal>

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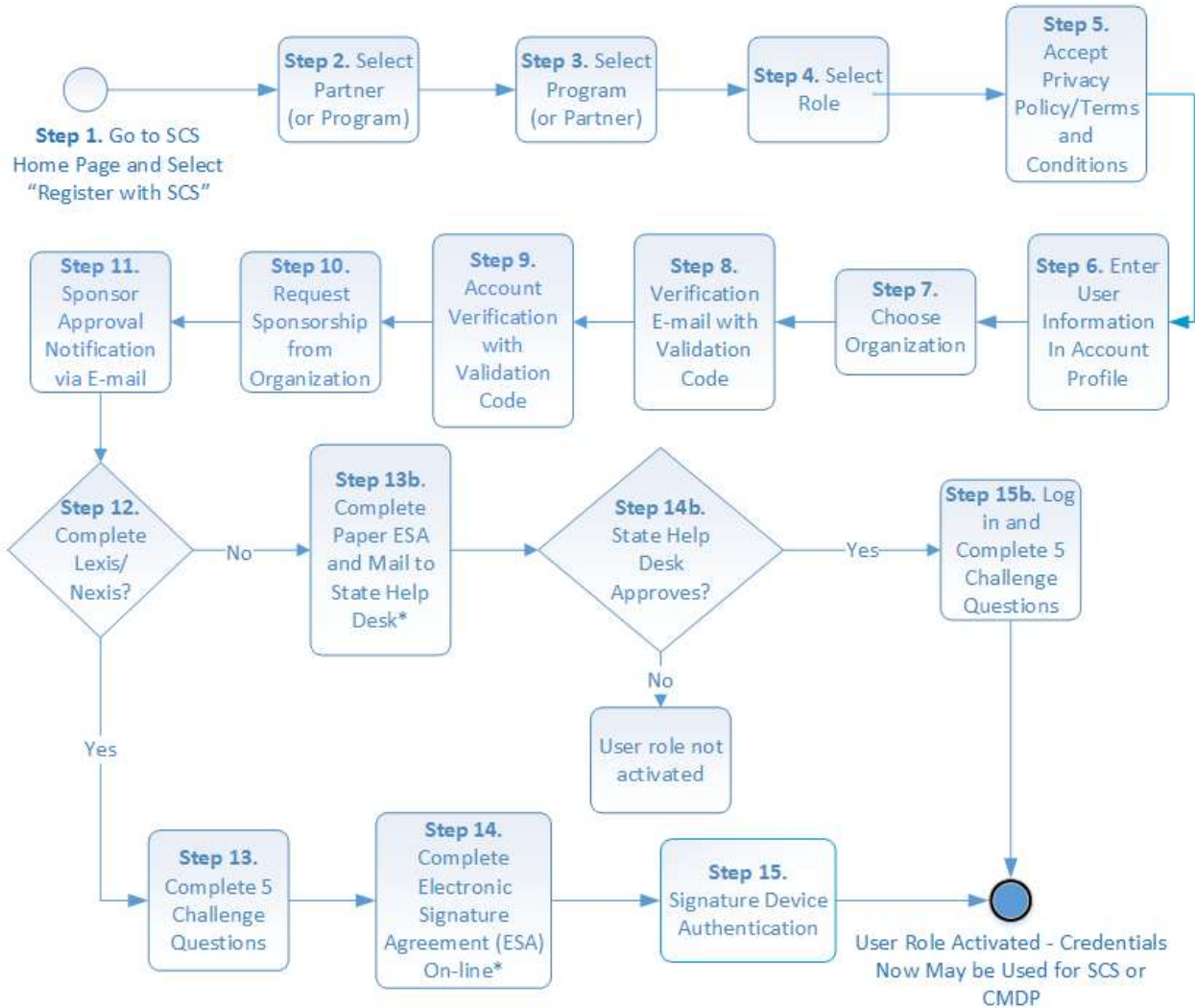
Shared CROMERR Services Portal

*Figure 15 - 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 24 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 31 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**.



**Figure 3116 - Private Lab or PWS Certifier Registration Sequence**

In the example in Figure 32, 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, the EPA logo and 'United States Environmental Protection Agency' are visible. Below the logo, there are navigation links for 'Home' and 'Recent Announcements'. The main header reads 'SCS Advanced Shared Services' with a 'Contact Us' link on the right. A sidebar on the left lists various registration steps: 'Services Requested', 'Partner / Program / Role', 'Program ID', 'Terms & Conditions', 'Rules of Behavior', 'Account Profile', 'Account Owner', 'Organization Information', 'Email Validation', 'Verify Identity', and 'Signature Agreement'. The 'Services Requested' section is active, showing two tabs: 'Register By Partner' (selected) and 'Register By Program'. Below the tabs, there are three selection fields: '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. At the bottom right of the selection area, there are 'Continue' and 'Cancel' buttons.

*Figure 32- 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 27-30 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.

### 2.6.1 – 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.

### 2.6.2 – CMDP Role Registration for Multi-Lab Users

A SCS user that is certified with multiple labs can access additional labs with the same SCS user ID by adding additional service to their account. First create an SCS account with one laboratory you are certified with. Then login to SCS and click the *Services* link. Then click the *Add Program Service* tab. (See Figure 33 below). Follow the instructions to add additional labs. When logging into CMDP, a user associated to multiple labs must select which lab ID they would like to access.

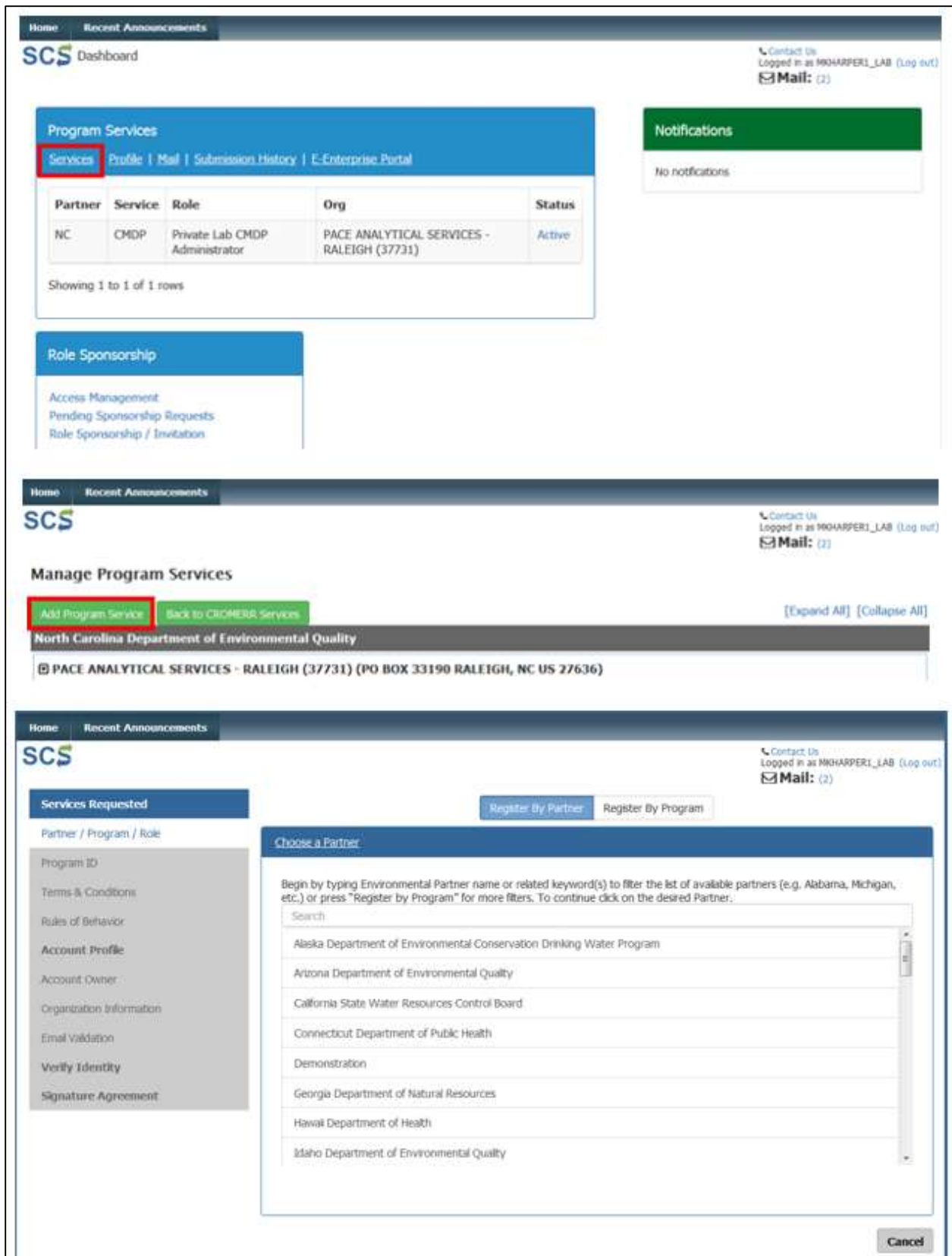


Figure 33- Adding Program to Existing SCS Account



### 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>									
<b>State Lab CMDP</b>									
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	