

CAMD Business System Certificate of Representation Tutorial



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Introduction

<u>Purpose of Tutorial:</u> This CAMD Business System (CBS) tutorial will guide you through the Certificate of Representation (COR) module of CBS.

It will step you through the CBS Login process and show you how to access information on the Home screen. It will also navigate through the screens related to facilities, representatives, units, owners/operators, programs and generators in the Certificate of Representation module.

Finally, it will describe the data submission process that will ensure edits to your CBS data are stored in the EPA database.

<u>Navigational Note:</u> You can jump to any topic you are interested in by clicking on the topic in the table of contents or by clicking on the labeled PDF links embedded within this document.

Conventions Used in this Document

The following acronyms are used throughout this document:

- CAMD means the Clean Air Markets Division;
- CBS means the CAMD Business System;
- COR means Certificate of Representation;
- DR means the Designated Representative (primary or alternate); and
- CROMERR means the Cross-Media Electronic Reporting Regulation.





[IMPORTANT MESSAGES WILL APPEAR HERE]

User Name: Password: Log On > Forgot Password or Locked Out? Click here to get instructions on obtaining a User ID for the CAMD Business System

WARNING NOTICE

This is a United States Environmental Protection Agency (EPA) computer system, which may be accessed and used only for official Government business. 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.

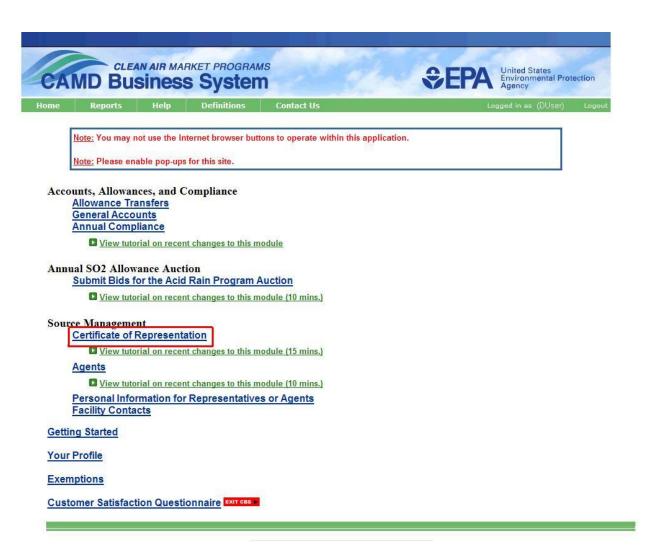
Login

You must be a DR or an agent to access CBS. For more information see http://www.epa.gov/airmarkets/business/industry/cbs.html

This screen shot shows the CBS login screen. After entering your user name and password, click the Log On button to continue.

If you have forgotten your password or have become locked out of the system, you can click the highlighted link to reset your password. If you still need assistance, see http://www.epa.gov/airmarkets/business/industry/cbs.html.

CAMD will post important messages related to CBS or CAMD programs in the box above the login fields.



CBS Home Screen

This screen shot shows the Home screen with the link to the Certificate of Representation module highlighted.

You must be a DR or source management agent to view the Certificate of Representation link on the Home screen.

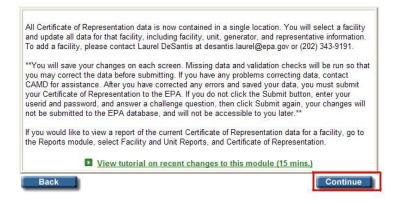
From the Home screen, you are able to access the different CBS modules and "Your Profile," which is used to manage your CROMERR challenge questions and your password. For more information about CROMERR, see http://www.epa.gov/airmarkets/business/docs/forms/CROMERRonepager.pdf. You may also view Reports, Help and Definitions by clicking the appropriate link at the top of the screen.

If you have questions about CBS, click the Contact Us link at the top of the screen to send an email to the appropriate CAMD staff.

Click on the highlighted Certificate of Representation link to continue.



CERTIFICATE OF REPRESENTATION PROCESS



Certification of Representation Process

This screen shot displays information about the module. If you click the Back button, you will return to the CBS Home screen. If you click Continue, you will be taken to the Certification Statement screen.

CERTIFICATE OF REPRESENTATION

Certification Statement

I certify that: "I am authorized to make this submission on behalf of the owners and operators of the source or units, or on behalf of the parties with an ownership interest with respect to the allowances held in the general account, for which the submission is made. I certify under penalty of law that I have personally examined, and am familiar with, any statements or information in this submission. Based on my inquiry of those individuals with primary responsibility for obtaining the information, I certify that the statements and information are, to the best of my knowledge and belief, true, accurate and complete. I am aware that there are significant penalties for submitting false statements and information or omitting required statements and information, including the possibility of fine or imprisonment."

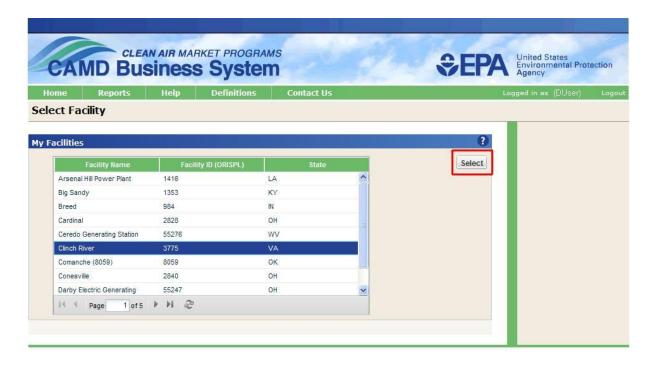
The designated representative or alternate designated representative must sign (i.e., agree to) this certification statement. If you are an agent and you click on "Agree", you are not agreeing to the certification statement, but are submitting the certification statement on behalf of the designated representative or alternate designated representative who is agreeing to the certification statement. An agent is only authorized to make the electronic submission on behalf of the designated representative, not to sign (i.e., agree to) the certification statement.



Certification Statement

Prior to accessing the Certificate of Representation module, you must agree to the Certification Statement. This screen shot displays the Certification Statement. If you are a designated representative or alternate designated representative, you are agreeing to the certification statement by clicking the Agree button. If you are an agent for a designated representative or alternate designated representative, you are submitting the certification statement on behalf of the designated or alternate designated representative.

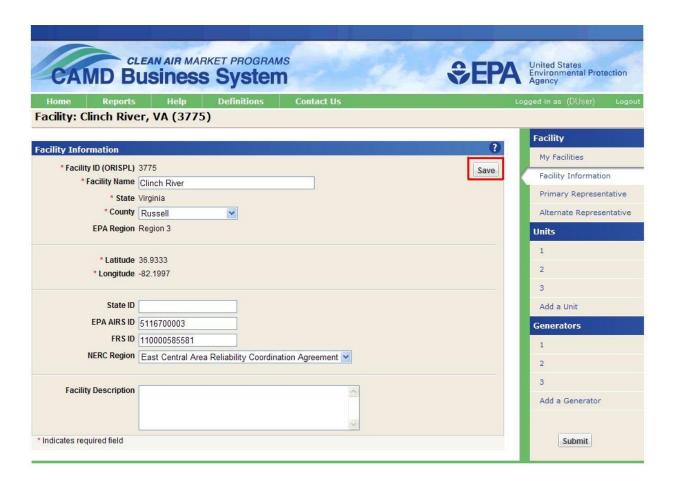
If you click the Disagree button, you will be taken back to the Certificate of Representation Process screen. If you click Agree, you will be taken to the Certificate of Representation module.



Select Facility

On the Select Facility screen, you will see all facilities for which you are either a representative or a representative's source management agent. You may sort the columns by clicking on the column headings. You may scroll through the pages by clicking the arrows at the bottom of the grid.

You must click a row in the grid and then click the highlighted Select button to continue.



Facility Information

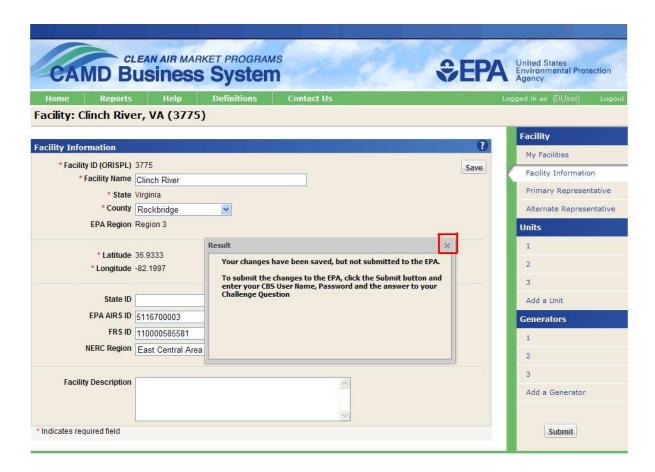
The Facility Information screen displays information for the selected facility as well as a navigation panel on the right side of the screen that lists the main areas of the Certificate of Representation module -- facilities and facility information, representatives, unit information, including owners, operators, and programs, and generator information. The owner/operator and program information will appear when you select a unit.

You can return to the list of facilities at any time by clicking the "My Facilities" link, but first you must Save and Submit any edits to the current facility, or all of your changes will be lost. See the section titled 'Submit'.

On the left side of the screen, you can add and edit detailed facility information. Asterisks indicate required fields.

If you are missing required information, you must add it before saving your data, or else you will receive errors when you try to submit to the EPA database. If you have questions about any of the required data fields, contact CAMD using the Contact Us link at the top of the screen.

After making edits to the Facility details, you must click the highlighted Save button before continuing to another panel or else your changes will be lost. At this point, the data have been saved, but not submitted to the EPA database. See the section titled 'Submit'.



Save

After clicking the Save button, a results message will appear. This results message will appear every time you save edits to a panel.

In this example, there were no errors so the message simply reminds you that your changes have been saved, but not submitted to the EPA database.

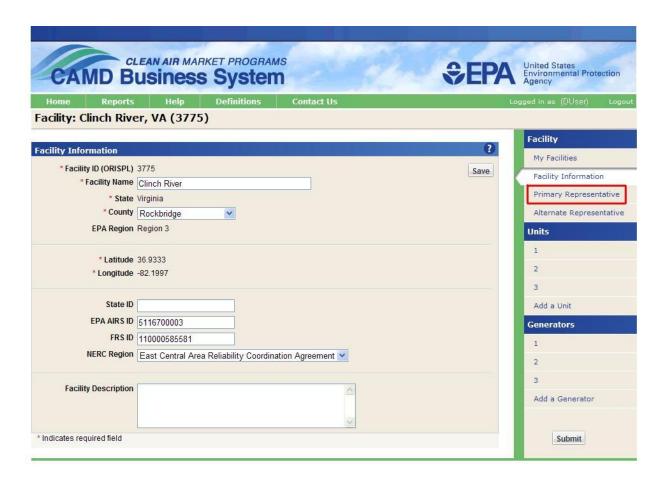
You will still need to click the Submit button after you have completed all of your edits to this facility to submit the saved data to the EPA database. See the section titled 'Submit'.

If there were errors on the panel, they would be displayed in the "Results" message.

You would need to correct those errors before attempting to save again.

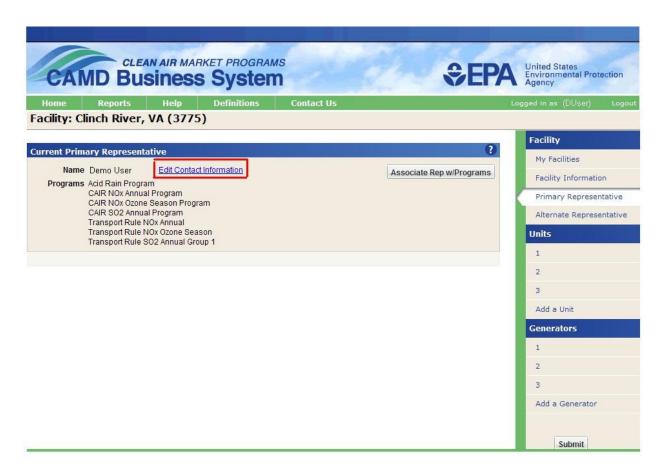
Some errors can only be identified when you click the Submit button and you will have an opportunity to correct those errors prior to submitting your data to the EPA database.

To continue, click the highlighted Close button.



Select Representative Panel

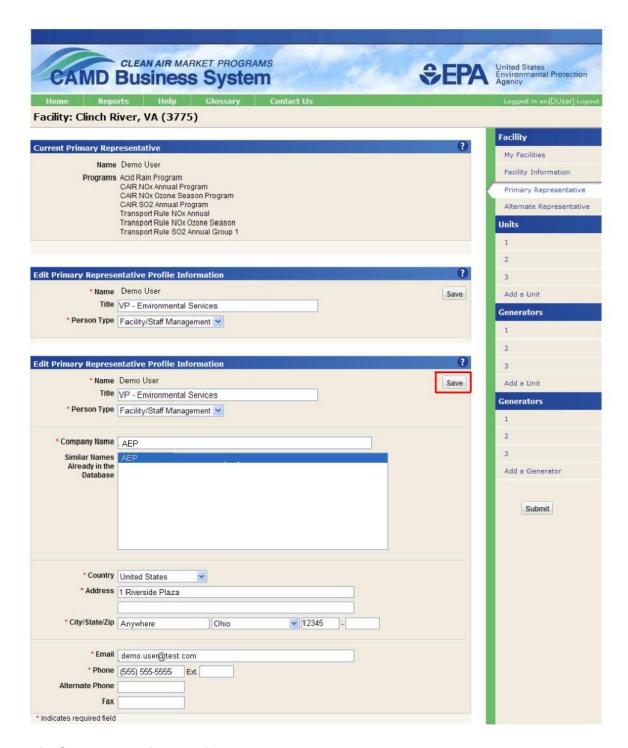
To edit your Primary Representative information, click the highlighted Primary Representative button in the right panel.



Select Representative Panel (continued)

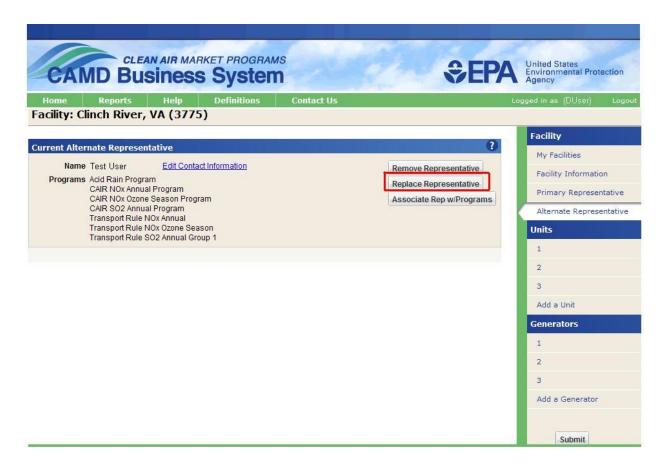
You can edit the primary representative's contact information by clicking the highlighted Edit Contact Information link.

You may also edit information for the alternate representative by clicking the Alternate Representative link from the navigation panel on the right, and then clicking the Edit Contact Information link.



Edit Contact Information

You can edit the representative's contact information, including address, phone number, fax number, title, company name, and email address. You cannot edit a representative's name. If a name change is needed, contact CAMD by clicking on the Contact Us link at the top of the screen. After making edits to the contact information, click the highlighted Save button before continuing to another panel or else your changes will be lost. At this point, the data have been saved, but not submitted to the EPA database. See the section titled 'Submit'.



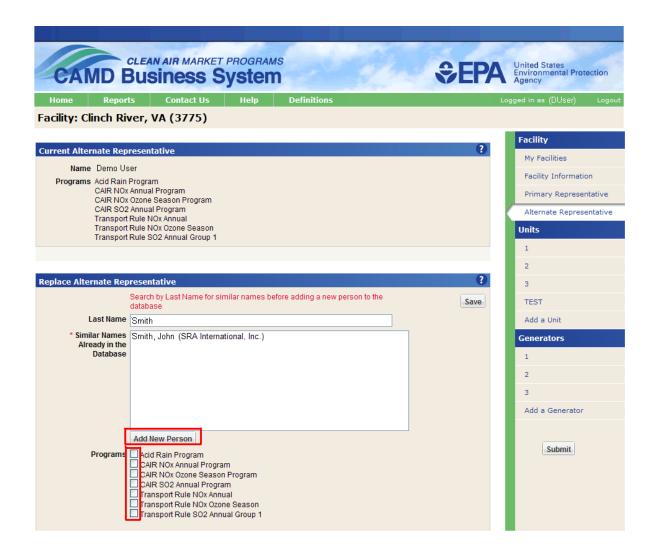
Replace Representative

To replace the Primary or Alternate Representative, click the highlighted Replace Representative button.

The rules about assigning Primary Representatives are as follows:

- A representative may not replace himself/herself with someone else;
- An Alternate Representative or a Source Management Agent can make himself/herself the Primary Representative;
- A Primary Representative can associate herself with new programs;
- A Primary Representative can associate the Alternate Representative with new programs;
- A Primary Representative can add or remove an Alternate Representative; and
- Facilities must have the same Primary and Alternate Representative for all programs.

The Primary Representative may remove the Alternate Representative by clicking the Remove Representative button. Note: a facility must always have an active Primary Representative. Alternate Representatives are optional.

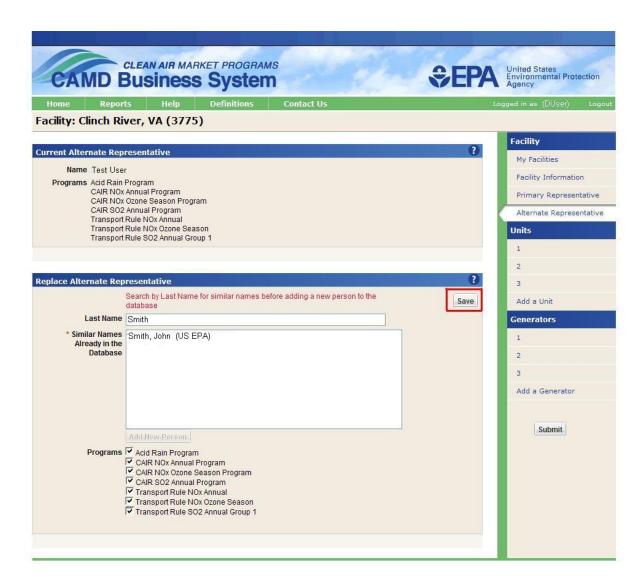


Replace Representative (continued)

On this screen, you are able to search the database for the person that is going to replace the Alternate representative. If the person is not in the EPA database, you may click the Add New Person button to enter his or her contact information. Please note that you will not be able to add a new person to the EPA database if his or her email address already exists in the EPA database.

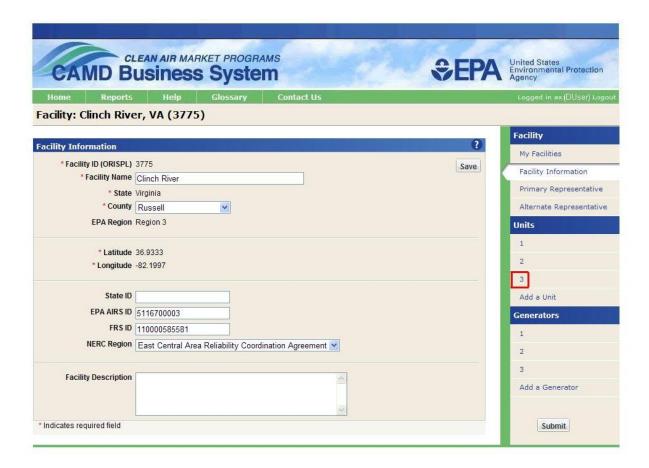
If you search for the person and they are in the EPA database, select the person by clicking that person's name in the list so they appear in the Last Name field.

After selecting the person, you must select all the applicable programs by clicking the highlighted program checkboxes.



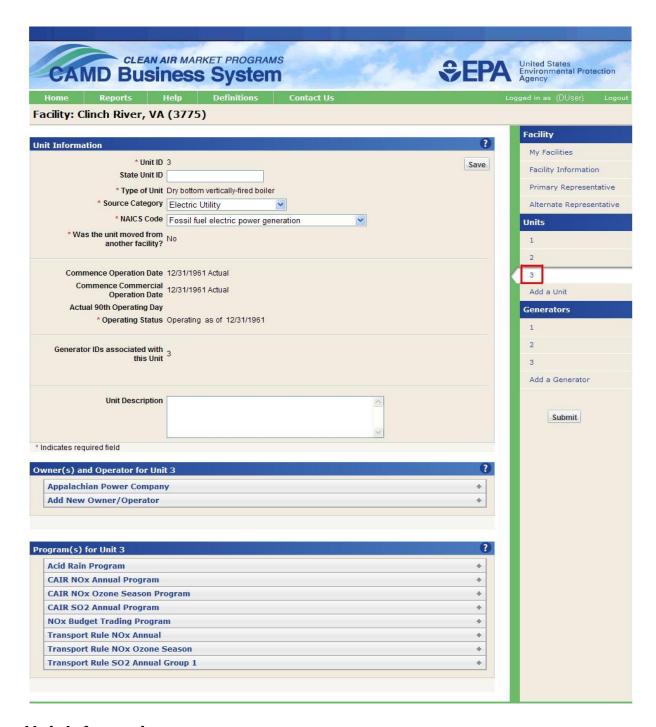
Replace Representative (continued)

To continue, click the highlighted Save button. At this point, the data have been saved, but not submitted to the EPA database. See the section titled 'Submit'.



Select Unit

To edit unit data for the selected facility you must select a unit from the menu on the right, which lists all units that currently exist in the CAMD database for this facility. Click the highlighted unit to continue.



Unit Information

All unit information is displayed on this panel. Asterisks indicate required fields. As with other screens, required data must be entered.

If you edit the unit information, click the Save button. At this point, the data have been saved, but not submitted to the EPA database. See section titled 'Submit'.

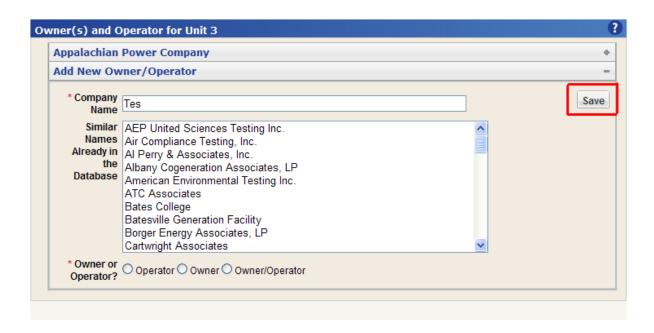
If you need to make edits to a field that is not editable, for example, commence operation date, you must contact CAMD by clicking the Contact Us link at the top of the screen. The lower panels on this screen allow you to edit Owners, Operators, and Programs for this unit.



Add New Owner/Operator

The Owner/Operator panel displays existing Owners and Operators for the selected unit. You may also add a new Owner/Operator for the selected unit on this panel.

To continue, click the highlighted Add New Owner/Operator link.



Add New Owner/Operator (continued)

You must always have an owner and operator present so you must add a new owner or operator before you remove an existing one.

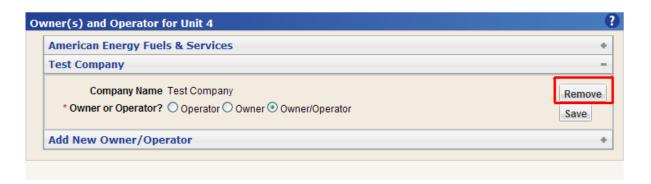
On this screen, you are able to search the EPA database for company names. You should first search the EPA database for the company name. If it exists in the database, it will appear in the box titled 'Similar Names Already in the Database'. If it does not exist, type the Company Name in the Company Name field. Click on the name, select the appropriate Owner/Operator radio button, and click the Save button. If there is more than one owner, make the next selection and click the Save button.

At this point, the data have been saved but not submitted to the EPA database. See the section titled 'Submit'.



Remove Owner/Operator

To remove an existing Owner or Operator, click the highlighted Company Name to expand the panel.



Remove Owner/Operator (continued)

To remove the Company, click the highlighted Remove button.

Remember, you must always have an Owner or Operator present so you must add a new Owner or Operator before you remove an existing one.

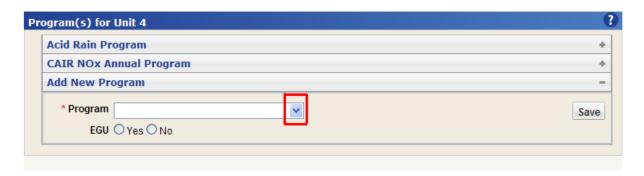
When you are finished with your Owner/Operator changes for the unit, click the Save button. At this point, the data have been saved but not submitted to the EPA database. See the section titled 'Submit'.



Add New Program

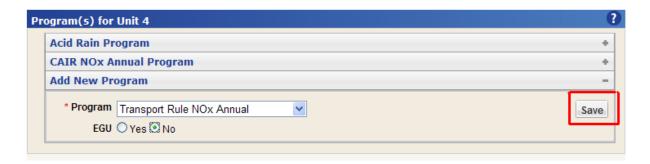
This screen shot displays the current Programs associated with the unit. To add another program, click the highlighted Add New Program button.

If you have any questions about program applicability, contact CAMD by clicking the Contact Us link at the top of any screen.



Add New Program (continued)

The Add New Program panel allows you to select a program from the highlighted drop down. It also allows you to select whether the unit is an Electric Generating Unit.

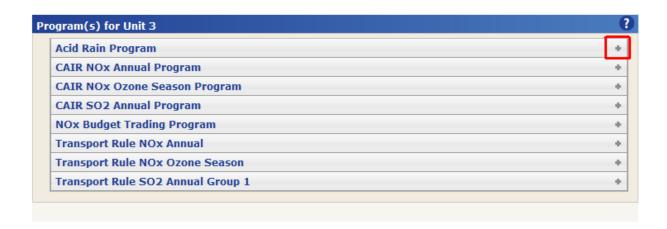


Add New Program (continued)

After selecting the program to add for the unit, click the highlighted Save button. You will have to add and save one program at a time.

At this point, the data have been saved but not submitted to the EPA database. See the section titled 'Submit'.

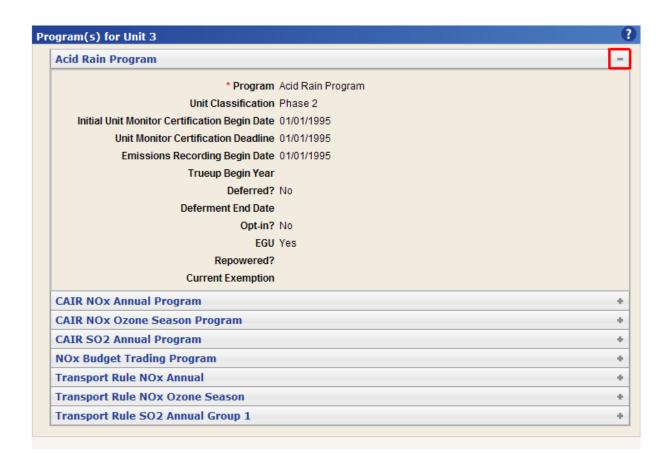
Note that you cannot remove programs through CBS; you must contact CAMD for help with removing programs.



Program(s) for Unit

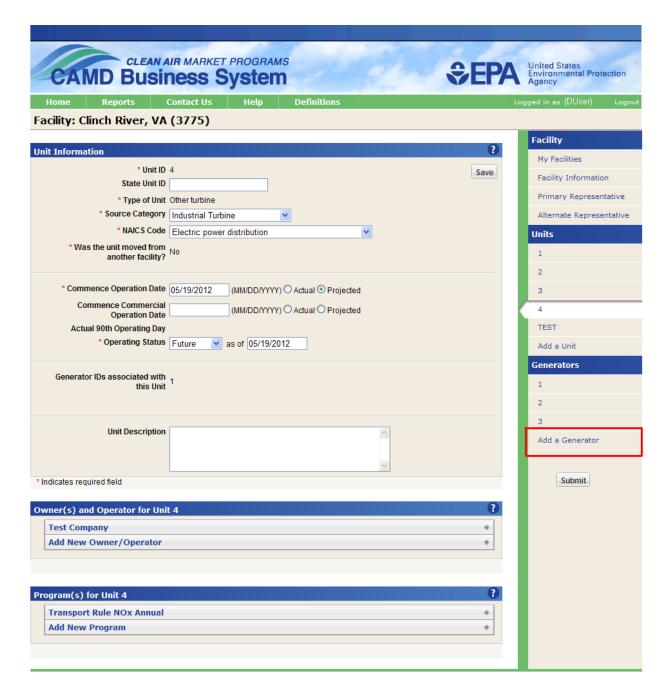
The Program(s) for Unit section displays the existing programs for the selected unit. You may view detailed program information by expanding each panel.

To continue, click the highlighted expand symbol.



Program(s) for Unit (continued)

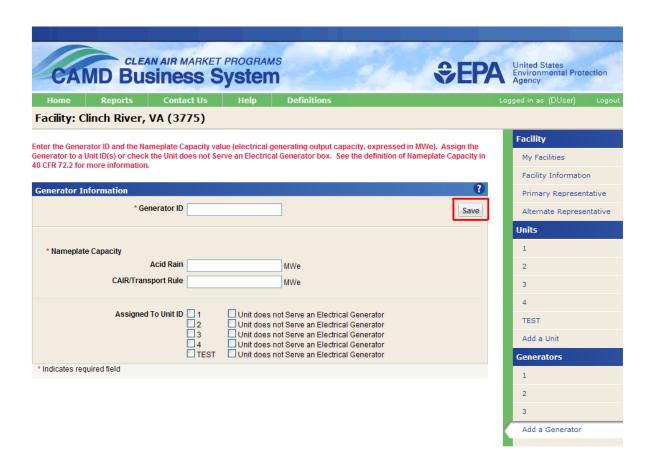
The Program(s) for Unit panel displays detailed information for the selected program and unit. You may collapse this panel by clicking the highlighted minus symbol in the top right corner.



Add a Generator

All generators associated with this facility's units are listed in the right menu.

To add a new one, click the highlighted Add a Generator button in the right panel.



Add a Generator (continued)

This screen displays the Generator Information screen. You must enter a Generator ID and Nameplate Capacity and then associate the generator with a unit by clicking the checkbox to the left of the unit name. Multiple units can be associated with a generator. If a unit is not currently associated with any generators, the "Unit does not Serve an Electrical Generator" checkbox should be checked on this screen.

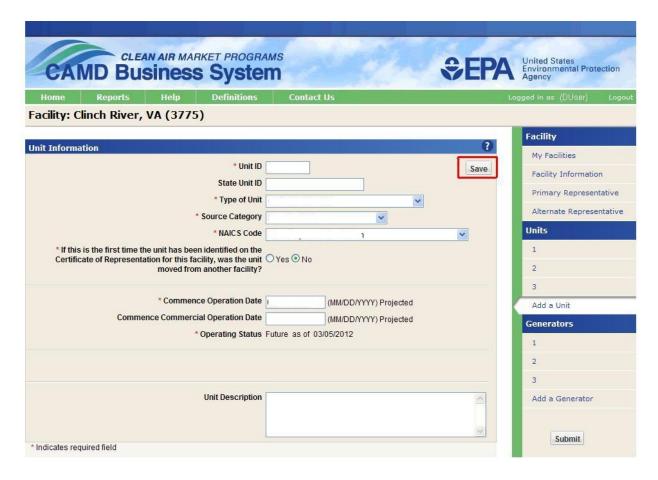
To continue, click the highlighted Save button. At this point, the data have been saved, but not submitted to the EPA database. See the section titled 'Submit'.



Add a Unit

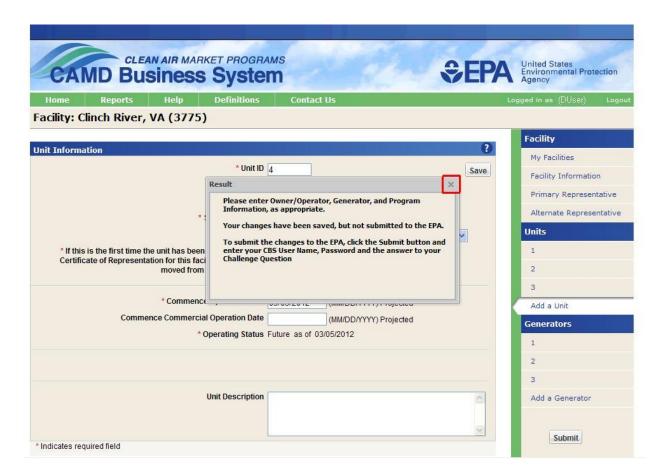
You can also add new units to the selected facility in this module.

To continue, click the highlighted Add a Unit button in the right panel.



Add a Unit (continued)

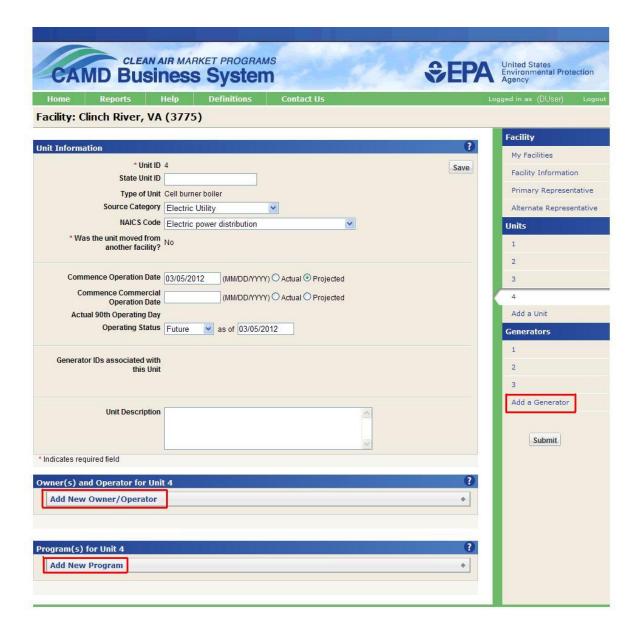
This screen shot shows the Add a Unit screen. All fields marked with an asterisk are required. You must enter the new unit information and click the Save button to continue.



Add a Unit (continued)

When you add a new unit, you will have to provide the owner/operator and program information for the new unit. The message in the results box will remind you to do so.

After closing the message, you will see the Unit Information screen with menus for Owner and Operator(s) and Program(s) for the new unit.



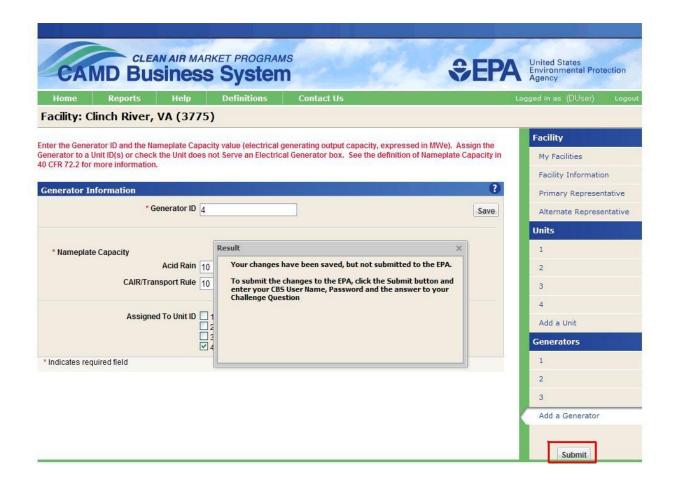
Add New Owner/Operator, Program, and Generator for New Unit

The menus for Owner/Operator and Program will now be visible.

To add new owner/operator information, see section titled 'Add New Owner/Operator.'

To add new program information, see section titled 'Add New Program.'

To add new generator information, see section titled 'Add a Generator.'

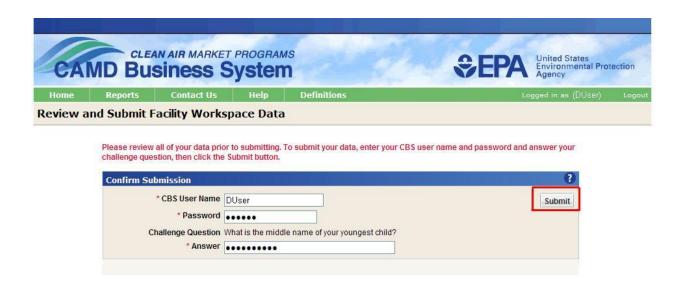


Submit

When you have completed all edits to the Certificate of Representation data for this facility, you need to submit your changes to the EPA database.

If you do not submit your changes, even the data that you saved temporarily on each panel will be lost when you navigate away from this module.

To continue, click the highlighted Submit button.



Review and Submit Facility Workspace Data

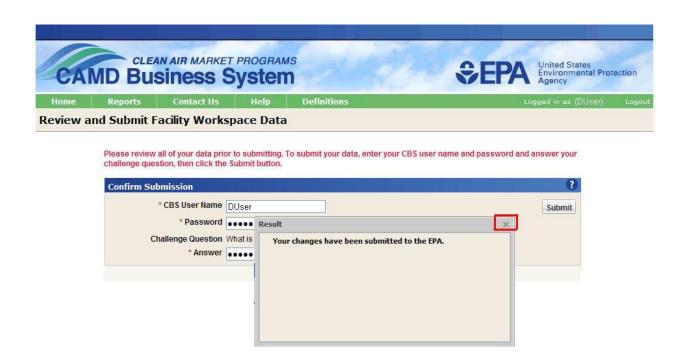
After clicking the Submit button, you have the opportunity to review all of your Certificate of Representation data for the facility on the Review and Submit Facility Workspace Data screen. You should carefully check your edits and make any further changes prior to submitting your data to the EPA database.

At the top of the Review and Submit screen is the Confirm Submission panel.

You must enter your CBS User Name and Password, and then answer one of your challenge questions, which are selected randomly by the application.

You have three chances to correctly enter your user name, password, and answer to a challenge question. After three failed attempts, you will be locked out of the CBS system.

To continue, click the highlighted Submit button.



Review and Submit Facility Workspace Data (continued)

CBS will validate the data.

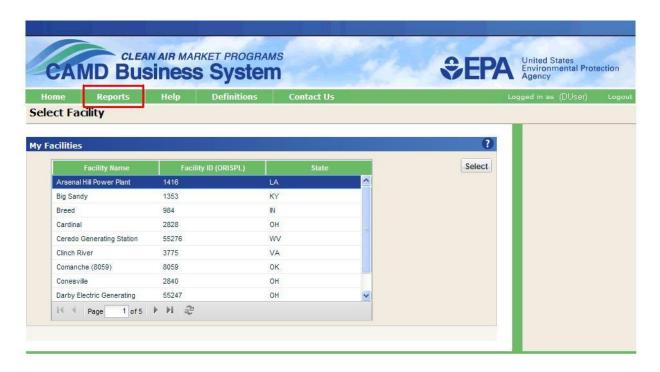
If there are no incorrect or missing data, you will receive the message, "Your changes have been submitted to the EPA."

Your edited data are now stored in the EPA database and will be populated in related systems.

If there were any errors in your data, the "Results" message will display the errors.

You must correct these errors, and then click the Submit button again to submit your data to the EPA database.

To continue, click the highlighted Close button.



Review and Submit Facility Workspace Data (continued)

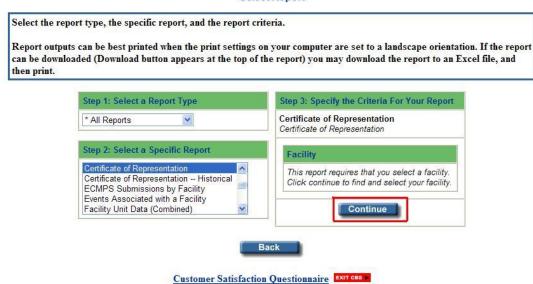
After your changes are submitted, you automatically return to the My Facilities page where you can select another facility.

If you want to review data for a facility in report format, you can do so using the Certificate of Representation Report in the Reports module.

To continue, click the highlighted Reports link.



REPORTS AND QUERIES Select Report



Certificate of Representation Report

In the Reports module, select Certificate of Representation as shown in Step 2, and then click the highlighted Continue button.

You would then highlight the desired facility, and click the Select button.

This will display all of the Certificate of Representation information for that facility. You can print the report or save the report to a file.

Conclusions

In this tutorial, you have learned how to navigate through the Certificate of Representation module to add and edit Certificate of Representation data, including facility and unit information, representatives, owner/operators, programs and generators.

You have learned how to save your data temporarily on each panel, and you have learned how to submit your data to the EPA database.

Finally, you learned how to access the Certificate of Representation report.

If you have any questions, click the Contact Us link at the top of any CBS screen to send an email to the appropriate CAMD staff.