



How to Manage Engineering Review Submissions in OTAQREG

This job aid is designed to help registered **Independent Third Party Engineers** submit Engineering Review Reports under the Renewable Fuel Standard (RFS).

Before you begin:

1. You must have a Central Data Exchange (CDX) account
2. You must be logged into the CDX OTAQREG program service
3. You must have two user roles with the selected company:
 - **Independent Third Party Engineer – Only Professional Engineers (PEs) can use this functionality in OTAQREG**
 - Part 80 Report Submitter

For help with these steps, see the documentation on EPA's Fuels Registration, Reporting, and Compliance Help website: <https://www.epa.gov/fuels-registration-reporting-and-compliance-help>

Access Submission Form

1. Click the Company ID
2. Select **Manage Attest/ER Submissions**
3. Select **Company Name**
4. Click **Continue**

The screenshot displays the EPA OTAQ Registration interface. At the top, the navigation bar includes the EPA logo, 'OTAQ Registration', and links for 'Home', 'Create New Company', and 'Associate To Existing Company'. The user is logged in as 'Farid'. The main content area is titled 'My Companies' and features a table with columns for 'Company ID', 'Company Name', 'Address', and 'My Roles'. A dropdown menu is open for the first row, with 'Manage Attest/ER Submissions' selected. Below this, the 'OTAQ Forms' page is shown, with a 'Select Company' dropdown menu where 'Deep South Oil & Drilling Co. (1221)' is selected, and a 'Continue' button.

My Companies

Show 10 entries Filter Companies:

Company ID	Company Name	Address	My Roles
4000	Deep South Oil & Drilling Co.	3000 West Congress Street, Lafayette, LA 70506, US	<ul style="list-style-type: none">Company EditorEMTS Fuels ABT ViewerPart 80 Report SubmitterEMTS Fuels ABT SubmitterEMTS RFS ViewerEMTS RFS SubmitterRCO

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You are here: OTAQ Forms Select Company

Select Company

Select the company for which you are making or viewing submissions. If you do not see your company in the list, you must first associate to the company in OTAQReg with the correct role.

If you do not have an active CDX ESA on file, you will not be able to create a new submission or view existing submissions until your ESA has been received by EPA.

Select Company

- Phoenix Natural Gas Company (1240)
- Deep South Oil & Drilling Co. (1221)

Continue

Select Action

Click links below to jump to that section of this job aid:

1. [Create new engineering review](#)
2. [Edit a saved submission](#)
3. [View or revise a submission](#)

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OTAQ Form Submissions Home

—Engineering Reviews

Existing submissions for the selected company are displayed below. Click the "View" link to view the Copy of Record for an existing submission, or the "Edit" link to edit an In Progress submission. Click the "Create New Engineering Review" button to create a new submission.

Submission ID	Created	Submitter	Status	Actions
ENG-2175	07-27-2018 3:57:48 PM		In Progress	Edit
ENG-2174	07-27-2018 2:20:00 PM	DANIEL.SMITH	Awaiting EPA approval	View

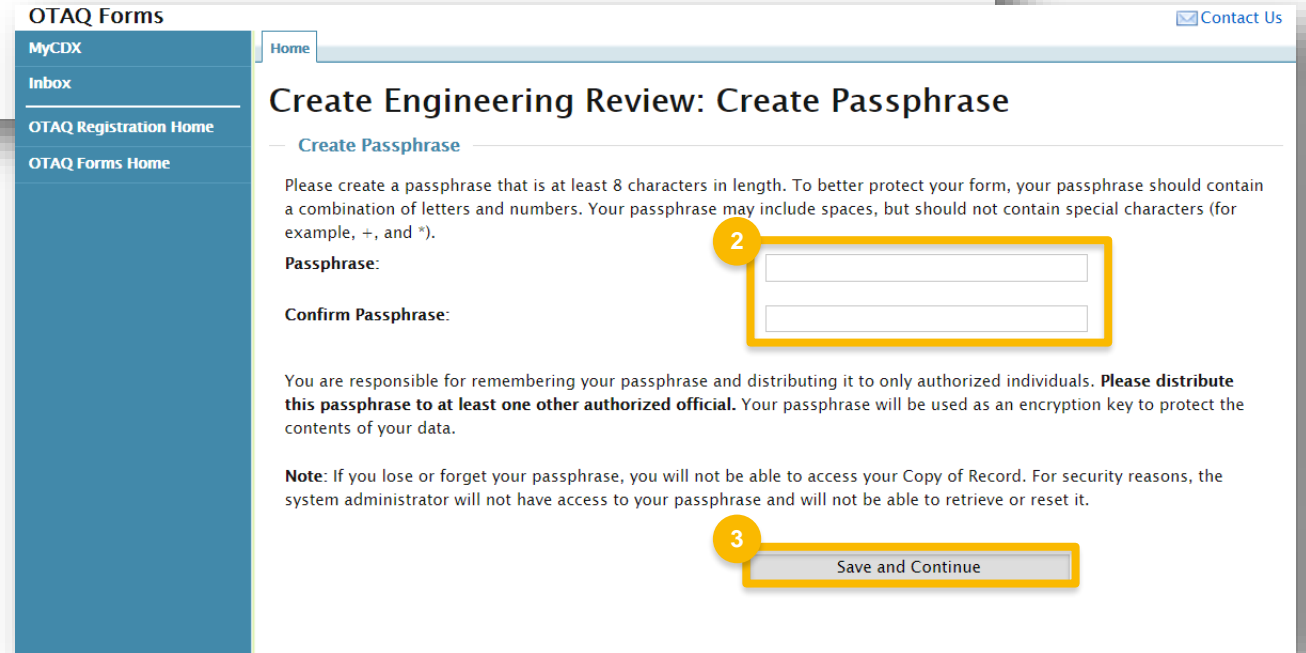
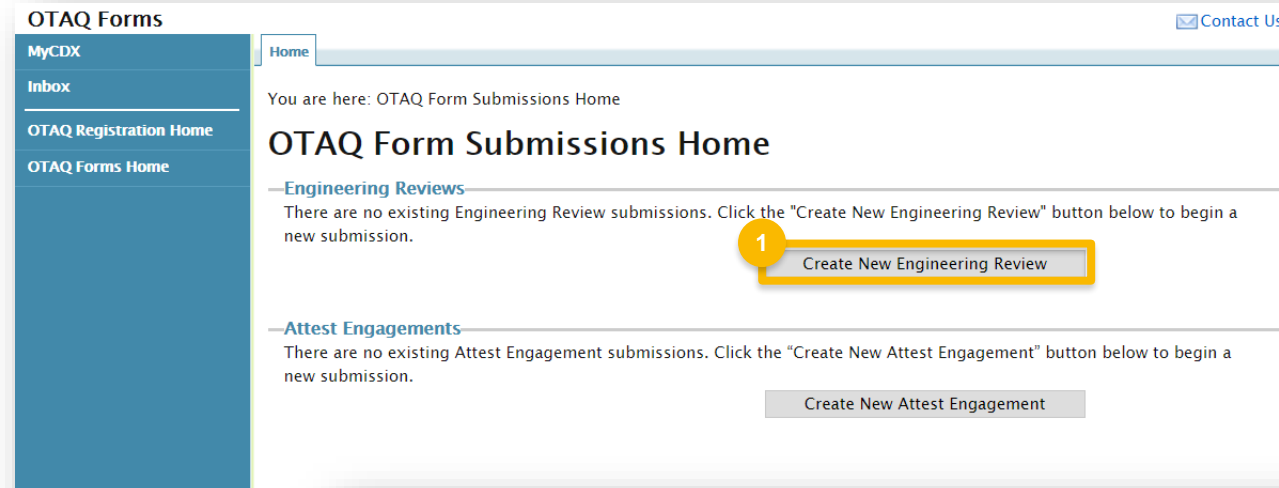
[Create New Engineering Review](#)

Create Passphrase

1. Click **Create New Engineering Review**
2. Enter and confirm a secure **passphrase***
3. Click **Save and Continue**

***IMPORTANT:** The secure passphrase is required to both 1) edit the submission later and 2) view the copy of record after submitting.

Steps continue on next slide...



Enter General Information

1. Select **Company Type**
2. Select **Facility**
3. Select **Grandfathered Indicator**
4. Click **Save and Continue**

Steps continue on next slide...

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ENG-2174

- * General Information
- * Professional Engineer
- Process Heat Fuels
- * Separated Waste
- * Supplemental Information

Engineering Review: General Information

Please complete all required fields to submit your Independent Third Party Engineering Review in accordance with [40 CFR Part 80 Subpart M](#). Information will be pre-populated based on the approved registration information for your selected company in OTAQReg, where applicable. If any of the pre-populated information is not correct, please return to OTAQReg and submit a Company Update to correct the data. Click the "Save" button to save your answers and complete the report at a later time. All information submitted as part of this Engineering Review may be claimed as Confidential Business Information.

Company Information

Please confirm your company information.

Name: Pheonix Natural Gas Company

Company ID: 1240

Company Type: * 1 Renewable Fuel Producer ▼

Facility Information

Please select the facility for which you have completed the Engineering Review. If the facility that you reviewed is not listed, please select "Other" and provide the required facility information.

Facility: * 2 COMPLETION RENTAL TOOLS INC ▼

Grandfathered Facility Information

Please indicate if this facility is a grandfathered facility. If you select "Yes", you will be required to enter additional grandfathered facility information as related to [§80.1403](#) and/or [§80.1450](#). Additional supplemental documentation relating to the facility's grandfathered status may be uploaded on the following page.

Grandfathered Indicator? * 3

Yes

No

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Save

4 Save and Continue

Enter Professional Engineer (PE) Information

1. Enter **Qualifications**
2. Click **Agree**
3. Indicate if the PE conducted a **site visit**
4. Enter **date of site visit**
5. Click **Save and Continue**

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- ✓ General Information
- Grandfathered Facility Supplemental Documents
- ▶ * Professional Engineer
- * Renewable Fuel Pathways
- Process Heat Fuels
- * Separated Waste
- * Supplemental Information

Engineering Review: Professional Engineer

Please confirm the name and contact information of the Professional Engineer that completed this Engineering Review. You are also required to indicate the Engineer's status and operational independence of the business (See §80.1450 (b)(2)(ii)). Additional supplemental documentation relating to the Professional Engineer may also be uploaded on the following page.

—**Professional Engineer Information**—

The Professional Engineer's information has been retrieved from your CDX Profile. If this information is incorrect, please return to MyCDX and update your registration.

First Name:

Last Name:

Title:

Phone:

Email:

—**Qualifications and Operational Independence**—

Please certify operational independence, and describe the qualifications of the Professional Engineer, including applicable educational and professional work experience in the chemical engineering field or fields related to renewable fuel production.

Qualifications: *

Please certify the following statements:

- The Professional Engineer's company is not operated by the Renewable Fuel producer or foreign ethanol producer, or any subsidiary.
- The Professional Engineer is free from any interest in the Renewable Fuel Producer's business.
- The Renewable Fuel Producer does not have any interest in the Professional Engineer's business.
- The Professional Engineer is not currently debarred, suspended, or proposed for debarment.

Agree: *

—**Site Visit**—

Please confirm that the site visit was made. In your description, be sure to comment on whether personnel interviews were conducted and documents were reviewed. If a site visit was not conducted, please provide justification and explain why a site visit was not conducted as part of this Engineering Review.

Did the Professional Engineer conduct a site visit? *


Yes

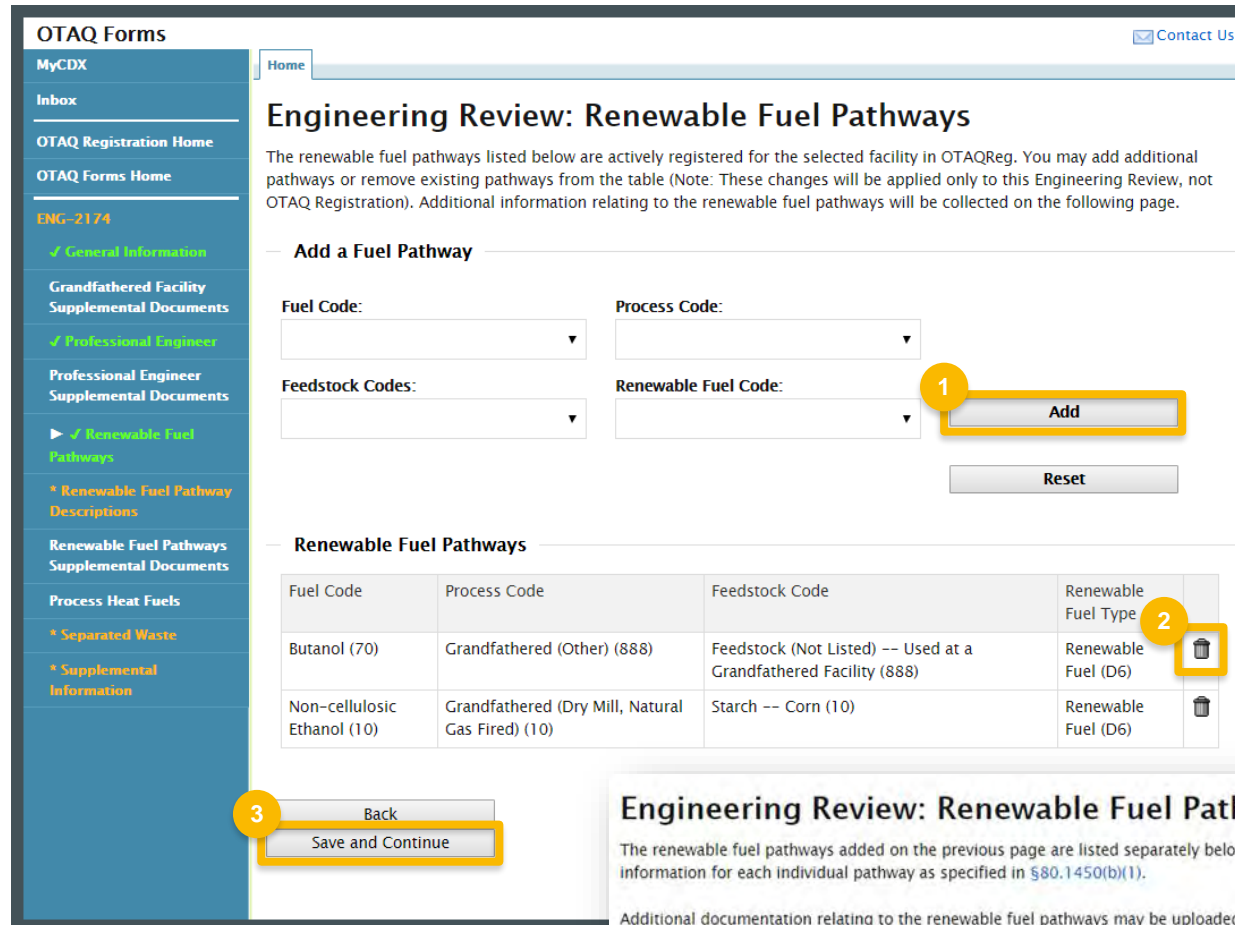
No

Date of site visit (or date of completion for multi-day site visits): *

Save and Continue

Enter Renewable Fuel Pathway(s)

1. To add a pathway, select an option from each dropdown menu and click **Add**
2. To remove a pathway, click the  icon
3. Click **Save and Continue**
4. Enter **Fuel Pathway Description**
5. Click **Save and Continue**



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Engineering Review: Renewable Fuel Pathways

The renewable fuel pathways listed below are actively registered for the selected facility in OTAQReg. You may add additional pathways or remove existing pathways from the table (Note: These changes will be applied only to this Engineering Review, not OTAQ Registration). Additional information relating to the renewable fuel pathways will be collected on the following page.



Add a Fuel Pathway

Fuel Code: Process Code:

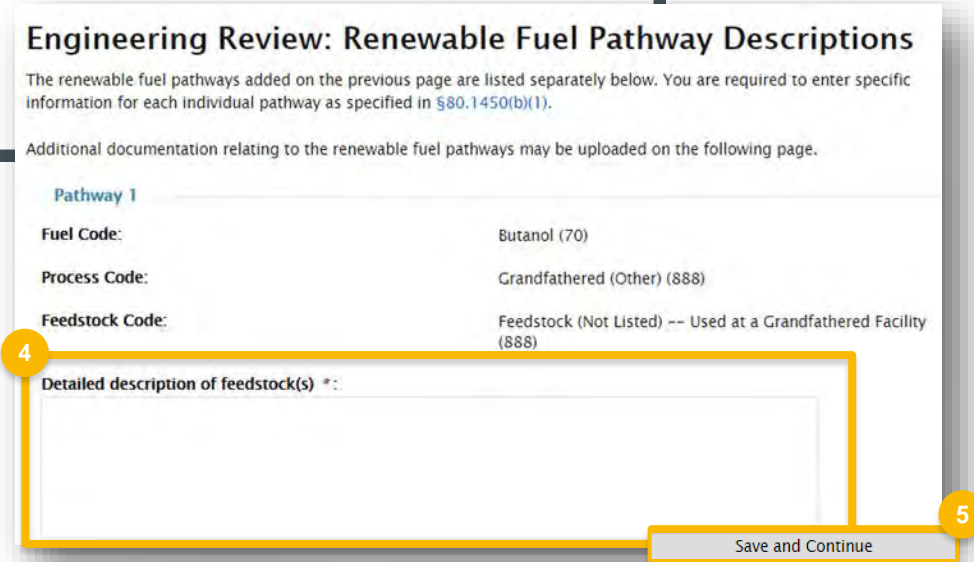
Feedstock Codes: Renewable Fuel Code:

1

Renewable Fuel Pathways

Fuel Code	Process Code	Feedstock Code	Renewable Fuel Type	
Butanol (70)	Grandfathered (Other) (888)	Feedstock (Not Listed) -- Used at a Grandfathered Facility (888)	Renewable Fuel (D6)	 2
Non-cellulosic Ethanol (10)	Grandfathered (Dry Mill, Natural Gas Fired) (10)	Starch -- Corn (10)	Renewable Fuel (D6)	

3



Engineering Review: Renewable Fuel Pathway Descriptions

The renewable fuel pathways added on the previous page are listed separately below. You are required to enter specific information for each individual pathway as specified in [§80.1450\(b\)\(1\)](#).

Additional documentation relating to the renewable fuel pathways may be uploaded on the following page.

Pathway 1

Fuel Code: Butanol (70)

Process Code: Grandfathered (Other) (888)

Feedstock Code: Feedstock (Not Listed) -- Used at a Grandfathered Facility (888)

4 Detailed description of feedstock(s) *:

5

Enter Process Heat Fuels

1. Enter the **Process Heat Fuel**
2. Click **Add**
3. Click **Add Source Facility**
4. In the pop-up box, enter Facility Information and click **Add Source Facility**

The screenshot shows a web interface for entering process heat fuels. At the top, there is a 'Home' link and a title 'Engineering Review: Process Heat Fuels'. Below the title is a paragraph of instructions: 'Please enter all applicable process heat fuels and their source facility(s) (See §80.1450(b)(1)(iv)(A)). You may add multiple fuel types, and multiple source facilities may be added per Process Heat Fuel.' Another paragraph states: 'Additional supplemental documentation relating to the process heat fuel and source facilities may be uploaded on the following page.'

The main section is titled 'Add a Process Heat Fuel Type'. It contains a form with a text input field labeled 'Process Heat Fuel:' (callout 1), an 'Add' button (callout 2), and a 'Reset' button. Below this, a table shows the added fuel: 'Process Heat Fuel: Biogas' with a 'Remove This Fuel' link and an 'Add Source Facility' button (callout 3). The table has columns for Name, Address, City, State, Country, and Zip.

A pop-up window titled 'Add Facility' is open, showing fields for 'Facility Name: *', 'Address 1: *', 'Address 2:', 'City: *', 'State: *' (with a dropdown menu), 'Country: *' (with a dropdown menu), and 'Zip: *'. At the bottom of the pop-up are 'Add Source Facility' (callout 4) and 'Reset' buttons.

Enter Separated Waste (as applicable)

1. Indicate if Separated Yard Waste, Separated Food Waste, or Separated Municipal Solid Waste were used as a feedstock
2. Click **Save and Continue**
3. Provide **additional information** about source facility verification and the waste plan description (as applicable)

Engineering Review: Separated Waste

Please indicate whether Separated Waste was used as feedstock as specified in §80.1450(b)(1)(vii) through (viii). If any of the waste types below were used, you must also indicate that the source facility was verified, and describe the ongoing verification plan to include how the waste will be collected, separated, and quantified.

1 Additional supplemental documentation for each of the applicable separated waste plans may be uploaded on the following page.

Separated Yard Waste Information
Please indicate whether Separated Yard Waste per §80.1426(f)(5)(i)(A) was used as a feedstock.

Was Separated Yard Waste used as a feedstock? *

Yes

No

Separated Food Waste Information
Please indicate whether Separated Food Waste per §80.1426(f)(5)(i)(B) was used as a feedstock.

Was Separated Food Waste used as a feedstock? *

Yes

No

Separated Municipal Solid Waste Information
Please indicate whether Separated Municipal Solid Waste per §80.1426(f)(5)(i)(C) was used as a feedstock.

Was Separated Municipal Solid Waste used as a feedstock? *

Yes

No

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Save

2 Save and Continue

3

Separated Yard Waste Information
Please indicate whether Separated Yard Waste per §80.1426(f)(5)(i)(A) was used as a feedstock.

Was Separated Yard Waste used as a feedstock? *

Yes

No

Have source facilities been verified? *

Yes

No

Plan Description: *
In your description, briefly describe how the waste will be collected and how the renewable fuel producer or foreign ethanol producer will conduct ongoing verification that such waste consists only of yard waste (and incidental other components such as paper and plastics) that is kept separate since generation from other waste materials.

Enter Supplemental Information

1. Indicate whether any information in the report is claimed as **Confidential Business Information (CBI)**
2. Indicate whether any of the regulations **§80.1450(b)(1)(ii)(A) or §80.1450(b)(1)(ix) through (xv)** apply
3. Indicate whether the Engineering Review is part of a **Three Year Update**
4. Add **Other Findings and Comments**
5. Click **Save and Continue**

Steps continue on next slide...

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Engineering Review: Supplemental Information

Please enter the following supplemental information.

—**CBI Indication**—
Please indicate if EPA should consider any information in this report Confidential Business Information (CBI). (Note: This will not impact the encryption of your submission, but the potential future release of data).

1 Please indicate if any information in this report is claimed as CBI: *

Yes

No

—**§80.1450(b)(1)(ii)(A) and §80.1450(b)(1)(ix) through (xv) Indication**—
Please indicate if any of the regulatory sections §80.1450(b)(1)(ii)(A) or §80.1450(b)(1)(ix) through (xv) apply.

2 Do any regulations §80.1450(b)(1)(ii)(A) and §80.1450(b)(1)(ix) through (xv) apply? *

Yes

No

—**Three Year Update**—
Please indicate if this Engineering Review is part of a three year update per §80.1450(d)(3). If "Yes", please verify the VRIN calculation per §80.1450(d)(3)(iii).

3 Is this review part of a three year engineering review update (per 80.1450(d)(3))? *

Yes

No

—**Other findings and comments**—
Any comments including data, methodology, exceptions, or comments that have not previously been addressed should be entered in the box below. Additional documentation may be uploaded on the following page.

4 **Other Findings and Comments:** *

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Save and Continue

Upload Supplemental Documents

1. Choose file and click Upload
2. Click Save and Continue

Engineering Review: Supplemental Documents

Please upload any supplemental documentation described below.
Only Microsoft Office, PDF, and images files (.jpeg and .png) are permitted to be uploaded.

1 §80.1450(b)(1)(ii)(A) and §80.1450(b)(1)(ix) through (xv) Supplemental Documents
Please upload supporting documentation related to sections §80.1450(b)(1)(ii)(A) and §80.1450(b)(1)(ix) through (xv), if applicable.

Choose File No file chosen
Upload

Document Name	Uploaded	Size (kb)
Nothing found to display.		

Other Supplemental Documents
Please upload any additional documents that have not previously been included in the submission, including translations of documents (if applicable).

Choose File No file chosen
Upload

Document Name	Uploaded	Size (kb)
Nothing found to display.		

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Save and Continue

Review and Sign

1. Review the information
2. Click Sign, Encrypt, and Submit

Steps continue on next slide...

1 Engineering Review: Review

Please review the information contained on this page prior to submitting the form.

Submission Information

This is your plan submission information

Submission Type: Engineering Review

Engineering Review Id: ENG-2174

Submitter Information

The information below is from your CDX Registration and will be passed on to EPA with your submission. If this information is incorrect, please update your CDX Registration information prior to starting your submission. These details can only be updated within the MyCDX link on the left-hand side of this screen or by the CDX Help Desk. Please visit the FAQ section for more information on making these updates.

First Name: Daniel

Last Name: Smith

CDX UserId: DANIEL.SMITH

Organization Name: PHEONIX NATURAL GAS COMPANY

Email Address: daniel.smith@phoenixgas.com

Phone Number: 337-555-9823

Extension:

Company Name and Location

Company ID: 1240

Name: Pheonix Natural Gas Company

Address 1: 123 Easy Street

Address 2:

City: Lafayette

State: Louisiana

Postal Code: 70506

Country: UNITED STATES

Company Type Information

Company Type: Renewable Fuel Producer

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Sign, Encrypt and Submit

Review and Sign (cont.)

3. Use the **eSignature Widget** to sign submission
4. The submission will appear on the OTAQ Form Submissions Home page with the status of **Awaiting EPA Approval**

3

eSignature Widget

1. Authentication

Log into CDX
User:
JOSH.GORDAN
Password:
[password field]
Show Password

Welcome Farid Ouedraogo

2. Verification

Question:
What is your favorite movie?
Answer:
[answer field]
Show Answer

Correct Answer

3. Sign File

[Sign](#)

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Success! You have successfully submitted your Engineering Review.

Engineering Reviews

Existing submissions for the selected company are displayed below. Click the "View" link to view the Copy of Record for an existing submission, or the "Edit" link to edit an In Progress submission. Click the "Create New Engineering Review" button to create a new submission.

4

Submission ID	Created	Submitter	Status	Actions
ENG-2174	07-27-2018 2:20:00 PM	DANIEL.SMITH	Awaiting EPA approval	View

[Create New Engineering Review](#)

Edit a Saved Submission

1. To edit a saved Engineering Review, click **Edit** next to a submission with the status of "In Progress"
2. Enter **Passphrase**
3. Click **Continue**

The "Engineering Review: General Information" page will display, retaining all previously saved information.

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Engineering Reviews

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Submission ID	Created	Submitter	Status	Actions
ENG-2175	07-27-2018 3:57:48 PM		In Progress	Edit
ENG-2174	07-27-2018 2:20:00 PM	DANIEL.SMITH	Awaiting EPA approval	View

[Create New Engineering Review](#)

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Engineering Review

Enter Passphrase

Please enter your Engineering passphrase.

Passphrase:

If you have forgotten your passphrase please click [Deactivate Submission](#) to begin a new submission.

View or Revise a Completed Submission

1. Click **View**
2. Enter the **secure passphrase**
3. Click **Continue**

Steps continue on next slide...

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Engineering Reviews

Existing submissions for the selected company are displayed below. Click the "View" link to view the Copy of Record for an existing submission, or the "Edit" link to edit an In Progress submission. Click the "Create New Engineering Review" button to create a new submission.

Submission ID	Created	Submitter	Status	Actions
ENG-2175	07-27-2018 3:57:48 PM		In Progress	Edit
ENG-2174	07-27-2018 2:20:00 PM	DANIEL.SMITH	Rejected by EPA	View

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Engineering Review

Enter Passphrase

Please enter your Engineering passphrase.

Passphrase:

If you have forgotten your passphrase please click [Deactivate Submission](#) to begin a new submission.

View or Revise a Completed Submission (cont.)

- 4. To revise a submission, click **Revise Engineering Review***
- 5. For the Copy of Record, click **View**, **Download HTML**, or **Download XML**
- 6. To view attached files, click **Download** next to the document

* Submissions in the following statuses can be revised:

- Awaiting EPA Approval
- Rejected by EPA
- Received by EPA

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Engineering Review Submission

4 [Revise Engineering Review](#)

Submission Info
This is your Engineering Review submission information.

Submission Type: Engineering Review
Engineering Review Id: ENG-2174
CROMERR Activity Id: _e25c2bf8-e0f3-4322-a98f-ff1b5166d9f3
CROMERR Copy of Record: **5** [View](#) | [Download HTML](#) | [Download XML](#)

Status: Rejected by EPA
Rejection Comment: EPA has provided you comments and requested your Engineering Review be resubmitted.
Submission Time: Jul 27, 2018 3:54 PM

Submitter Information
The information below is from your CDX Registration and has been passed on to EPA with your submission.

First Name: Daniel
Last Name: Smith
CDX UserId: DANIEL.SMITH
Organization Name: PHEONIX NATURAL GAS COMPANY
Email Address: daniel.smith@phoenixgas.com
Phone Number: 337-555-9823
Extension:

Supplemental Documents

Document Name	Category	Uploaded	Size (kb)	
Sample Engineering Review Attachment.docx	Grandfathered	07-27-2018 2:33:20 PM	12.16	6 Download
Sample Engineering Review Attachment.docx	Professional Engineer	07-27-2018 2:50:43 PM	12.16	Download
Sample Engineering Review Attachment.docx	Other Supplemental	07-27-2018 3:13:32 PM	12.16	Download

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Forgotten Passphrase

1. Access the submission and click **Deactivate Submission**
2. Click **OK** to confirm that you want to deactivate your submission
3. Enter and confirm a **new passphrase**
4. Click **Deactivate and Continue**

The current submission will be deactivated and the "Engineering Review: General Information" page will display to allow the ER to be resubmitted.

Engineering Review

— **Enter Passphrase** —

Please enter your Engineering passphrase.

Passphrase:

If you have forgotten your passphrase please click **Deactivate Submission** to begin a new submission.

Are you sure you would like to deactivate your submission. The information contained within this submission will no longer be accessible.

Deactivate Engineering Review: Create a new passphrase

— **Deactivate and Create New Engineering Review passphrase** —

Important Note: You are about to deactivate an Engineering Review submission ENG-2175. Once you click **Deactivate and Continue** button the old Engineering Review will be deactivated and the contents will no longer be accessible.

Please create a passphrase that is at least 8 characters in length. To better protect your form, your passphrase should contain a combination of letters and numbers. Your passphrase may include spaces, but should not contain special characters (for example, +, and *).

Passphrase:

Confirm Passphrase:

You are responsible for remembering your passphrase and distributing it to only authorized individuals. **Please distribute this passphrase to at least one other authorized official.** Your passphrase will be used as an encryption key to protect the contents of your data.

Note: If you lose or forget your passphrase, you will not be able to access your Copy of Record. For security reasons, the system administrator will not have access to your passphrase and will not be able to retrieve or reset it.