

Managing Organization Contacts

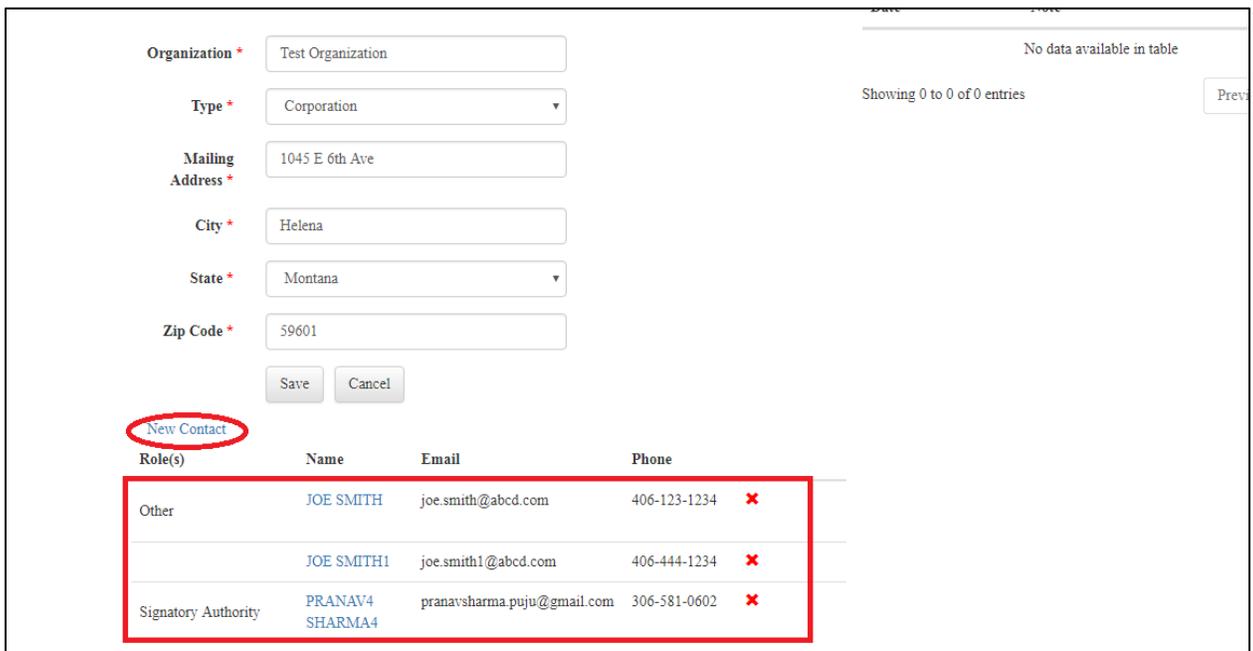
HOW TO MANAGE CONTACTS (FOR ORGANIZATION ADMINISTRATORS)

After creating a new organization or gaining access to one as organization administrator, you will be able to manage contacts within that organization (Not to be confused with Facilities, Facilities contacts will be addressed later). In FACTS, anyone linked to your organization is an **organization contact**. Assigning a **FACTS role** to an organization contact defines how that contact can interact with FACTS. Making the organization contact a responsible party on a particular application makes them a [representative](#) with respect to that application.

- 1) Click on the “Organizations and Contacts” link in your top menu bar



- 2) Click on the organization you have access to. If your organization already has contacts associated, these will be listed in the bottom left portion of this page. You can either edit one of these contacts or add a new one by following the “New Contact” link below the Save and Cancel buttons.



The screenshot shows the organization contact management interface. On the left, there is a form with the following fields: Organization (Test Organization), Type (Corporation), Mailing Address (1045 E 6th Ave), City (Helena), State (Montana), and Zip Code (59601). Below the form are 'Save' and 'Cancel' buttons. A 'New Contact' link is circled in red. On the right, there is a table with the following content:

Role(s)	Name	Email	Phone	
Other	JOE SMITH	joe.smith@abcd.com	406-123-1234	✘
	JOE SMITH1	joe.smith1@abcd.com	406-444-1234	✘
Signatory Authority	PRANAV4 SHARMA4	pranavsharma.puju@gmail.com	306-581-0602	✘

The table also includes a 'Showing 0 to 0 of 0 entries' message and a 'Prev' button.

Managing Organization Contacts

- 3) You can grant appropriate access to the contact by clicking “click here”

DEQ MONTANA FACTS Online Permitting Test v0.1 Home Organizations And Contacts My Account Tutorials

Edit Permitted Organization Contact

No access to FACTS. [Click here](#) to provide access for this user.

Job Title * Plant operator

Email joe.smith1@abcd.com

Company Name Test Organization

First Name * JOE

Last Name * SMITH1

Phone * 406-444-1234

 Help

- 4) Click on “Confirm” and then select appropriate role as your see fit

No access to FACTS. [Click here](#) to provide access for this user.

Job Title * Plant operator

Email joe.smith1@abcd.com

Company Name Test Organization

First Name * JOE

Last Name * SMITH1

Phone * 406-444-1234

New Address

Confirm Adding Roles to Contact

Adding a role to this contact will initiate a FACTS user using the supplied email address. Please ensure the correctness of the supplied email address before proceeding, after which you will not be able to edit the email address anymore. Are you sure you want to continue?

Confirm **Cancel**

Managing Organization Contacts

Edit Permitted Organization Contact

Billing
 Organization Admin
 Other
 Signatory Authority
 Preparer

Job Title *

Email

Company Name

First Name *

Last Name *

Phone *

New Address
 Fill from Organization

Mailing Address *

City *

State *

Zip Code *

Billing: A billing contact will be allowed to make payment against any application or permit and will be the recipient of annual invoices for the permit he/she is assigned to.

Organization Admin: An administrator can add, edit and remove users from an organization and view/edit all applications and permits. An administrator does not have signatory privilege, reserved for the owner or operator. The first user assigned to an organization is automatically assigned the administrator role.

Signatory Authority: A signatory authority is defined in ARM 17.30.1323. A signatory authority has organization administrator rights in addition to signatory rights.

Preparer: A preparer can create and edit permit applications and view his/her previous applications/permits. A preparer could also supply additional information on a previous application/permit as requested by the DEQ.

Other: All other roles represented within organization can be assigned this read-only FACTS role.

Signatory Authority Setup

This section describes how to give the Signatory Authority legal authority to sign an application electronically. A Signatory Authority as defined in ARM 17.30.1323:

- For a corporation,
 - (i) A president, secretary, treasurer, or vice-president of the corporation.
 - (ii) The manager of one or more manufacturing, production, or operating facilities.
- For a partnership or sole proprietorship, by a general partner or the proprietor, respectively; or
- For a municipality, state, federal, or other public facility, by either a principal executive officer or ranking elected official.

Anyone [assigned](#) the Signatory Authority role must go through two additional steps before s/he can actually sign an Application/NOI (refer to the Appendix for a [User Registration Workflow Diagram](#)):

1. **Identity Proofing:** Once the Signatory Authority is designated and authorized for an organization, s/he needs to login to go through Identity Proofing. This process is done once per organization. Follow the link named "Click here for ID proofing" on most organization or contact pages (Home/Dashboard, My Account, etc.). This process will ask for identifying information to verify your identity. If you are unable to verify your information (which can occur if your

Managing Organization Contacts

information has changed recently), please contact the DEQ to perform an offline identity proofing.

2. Sign the Electronic Signature Agreement (**ESA**): Once you pass the ID proofing process, you can proceed and sign the ESA instantly and electronically online. Follow the link after “Please review and sign the following Electronic Signature Agreements (ESA)” on most organization or contact pages (Home/Dashboard, My Account, etc.) which will lead you to this page:

Sign Electronic Signature Agreement (ESA)

Click [here](#) to download and review your ESA for SOME COMPANY, then sign it by answering the questions below.

Password *

Question What is your favorite vacation destination?

Answer *

Download and read the ESA document following the link at the top of the page, then electronically sign it by providing your password and the answer to one of the secret question provided during [registration](#). The ESA document in itself is the legally binding agreement regarding your electronic signature and is a pre-requisite to signing any applications/NOIs. Once you have signed your document the CROMERR system will email the signer a confirmation notice.

Managing Organization Contacts

Wed 11/15/2017 2:51 PM

 cromerr-auto-notify@epa.gov
CROMERR Notification

To

Event notification: a document was signed and stored in the CROMERR archive.

Name: APP9926.PDF
Date: Wed Nov 15 11:40:31 EST 2017
Document ID:
Activity ID:
Dataflow: scs-mt-deq-id-proof

Training Reference: <http://www2.epa.gov/cromerr/lesson-8-cromerr-system-checklist-items>

These two steps are not required to initiate and submit an application; however, you will be prompted to perform them before you can [sign an Application](#).