Exercise 2 – RO/Preparer Designations

**Step 1:** After logging into GEOS select “My Account” from the main menu of the dashboard.

**Step 2:** Select “Manage Consultants and Preparers”. To add a new preparer, click the “Add User” button. The system first prompts for the preparer’s e-mail, which means the preparer is required to have an account in GEOS first.

**Step 3:** Partner with someone sitting near you and enter the email address they used to create their account in GEOS. GEOS asks for the effective date and expiration date of this association. Remember that no expiration date is necessary. After you have entered the email address and the relevant dates click the “Validate & Associate” button to confirm that the requested user has a valid GEOS account.
Step 4: The RO needs to “Add Authorizations” for the preparer. Application authorization defines the facility(s) and the application type(s) (i.e. Title V or NPDES) the preparer is allowed to prepare, as well as the permission access. Once the association is completed, the preparer can log in and begin working on applications.

Step 5: The RO must select the App Name, Permission and Facility that the preparer will need access to. After you have selected all three of these hit the “OK” button at the bottom of the screen. Please note you may not select your facility until you have been approved by EPD.

Step 6: After you have added the Application Authorizations you will need to “Save” everything in order to commit it to GEOS.
Step 7: Now if you select “Manage Consultant and Preparers” it will show a grid view of the consultants authorized to work for your facility. If you wish to remove a consultant, simply click the red x. If you wish to modify a consultant click on the pencil and paper icon.