



## **SmartLabel (SPL) User Guide (DRAFT)**

Environmental Protection Agency

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## 1 Introduction

The United States Environmental Protection Agency (EPA) Office of Pesticide Programs (OPP) developed the SmartLabel (SPL) application to aid registrants in the process of electronically submitting pesticide labeling documents to EPA. One of the goals of the SmartLabel system is to make label information more quickly available to the public in an easily searchable format. As a fully electronic system, SmartLabel will make the label approval process more efficient by creating standardized label sections for all pesticide labels. The system will also make it easier to compare previous label versions without losing the necessary flexibility to make a label appropriate for each product.

A document created within SmartLabel builder consists of all labeling and use documentation and metadata required by EPA to properly process the package.

### 1.1 Purpose

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The purpose of this document is to provide instructions on how to use the SmartLabel Product Label (SPL) Builder. This document provides guidance on how to properly prepare a Product Label and/or Use Index document for submission to EPA.

After reviewing this document, users will be able to:

- Access the SmartLabel application via Central Data Exchange (CDX)
- Navigate the Product Label and Use Index documents in the SmartLabel application
- Understand and navigate the various features found in the SmartLabel builder
- Create and prepare the following SmartLabel document types:
  - End Use Pesticide Label
  - Use-Index
- Save a copy of the generated SmartLabel XML for storage and submission
- Upload a SmartLabel XML into the SmartLabel builder to continue a previous label

## 2 System Requirements

To use the SmartLabel application the following are required:

- An e-mail account
- A supported web browser with Java Script enabled and pop-up blockers disabled
- Internet access
- CDX username and password

### 2.1 Supported Browsers

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For optimal performance, it is recommended that you use Google Chrome to access the PSP application. However, the following browsers are supported:

- Google Chrome 44 or above  
Go to the following link to download: <http://www.google.com/chrome>
- Microsoft Edge  
Go to the following link to download: <https://www.microsoft.com/en-us/windows/microsoft-edge>
- Mozilla Firefox 3.5 or above  
Go to the following link to download: <http://www.mozilla.com/en-US/firefox/all-older.html>
- Safari 4 or above  
Go to the following link to download: <http://support.apple.com/kb/dl877>

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## 3 SmartLabel Functionality

This section describes:

- The SmartLabel User Roles
- How to access the SmartLabel application
- How to navigate the SmartLabel 'Home' screen
- How to access the SmartLabel User Guide

### 3.1 SmartLabel User Roles

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Users can access the SmartLabel application via PSP as one of two roles - Primary Submitter and Authorized Agent. As a Primary Submitter, you can create new SmartLabel documents, upload and edit existing documents using SmartLabel, and sponsor and maintain Authorized Agent users' access to PSP.

**Important:** The Primary Submitter is intended to be an official representative of the associated company. However, if an agent registers as a Primary Submitter, they assume all the responsibilities of the Primary Submitter. These responsibilities include sponsoring Authorized Agents and managing their access.

As an Authorized Agent, you can create, upload, and edit documents. You are unable to sponsor other users' access to PSP.

For more information about user roles and CDX registration, please refer to the 'OPP CDX Pesticide Submission Portal Registration User Guide' below:

[https://cdx.epa.gov/content/documents/PSP/OPP\\_CDX\\_Pesticide\\_Submission\\_PortalRegistration\\_UserGuidev1.0p.pdf](https://cdx.epa.gov/content/documents/PSP/OPP_CDX_Pesticide_Submission_PortalRegistration_UserGuidev1.0p.pdf)

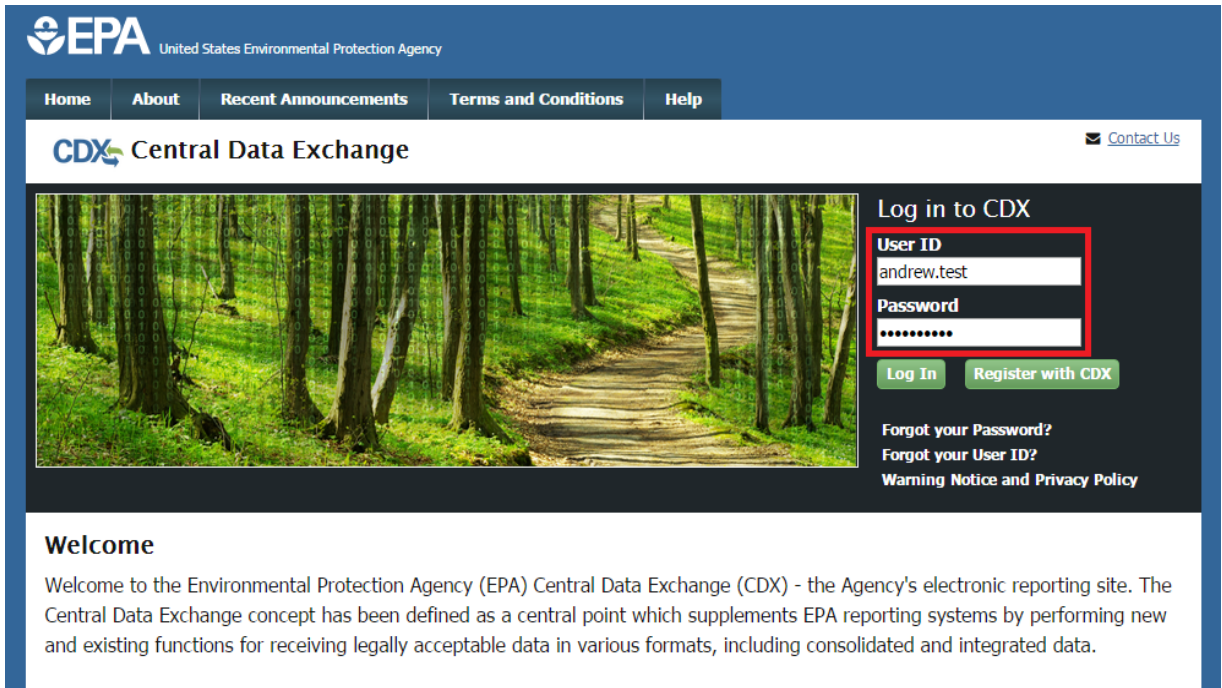
### 3.2 Access the SmartLabel Application

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You can access the SmartLabel application via the Pesticide Submission Portal (PSP) from the CDX 'Home' screen. To access the CDX 'Home' screen, navigate to <https://cdx.epa.gov/>.

Exhibit 3-1 below shows a screen capture of the CDX 'Home' screen.





**Exhibit 3-1: CDX Home Screen**

**Navigation:** Enter a valid User ID and Password into the ‘User ID’ and ‘Password’ fields, and click the ‘Log In’ button.

After logging in, you will be navigated to the ‘MyCDX’ screen. This screen lists the program services with which you are associated as well as your status and role(s) for those services. If you are registered for the PSP application, you will see ‘PSP: Pesticide Submission Portal’ in the services list. ‘Primary Submitter’ and/or ‘Authorized Agent’ will appear as a blue link under the ‘Role’ column as shown in Exhibit 3-2 below.

Services			Manage
Status	Program Service Name	Role	
	PSP: Pesticide Submission Portal	<a href="#">Primary Submitter</a>	
	PSP: Pesticide Submission Portal	<a href="#">Authorized Agent</a>	

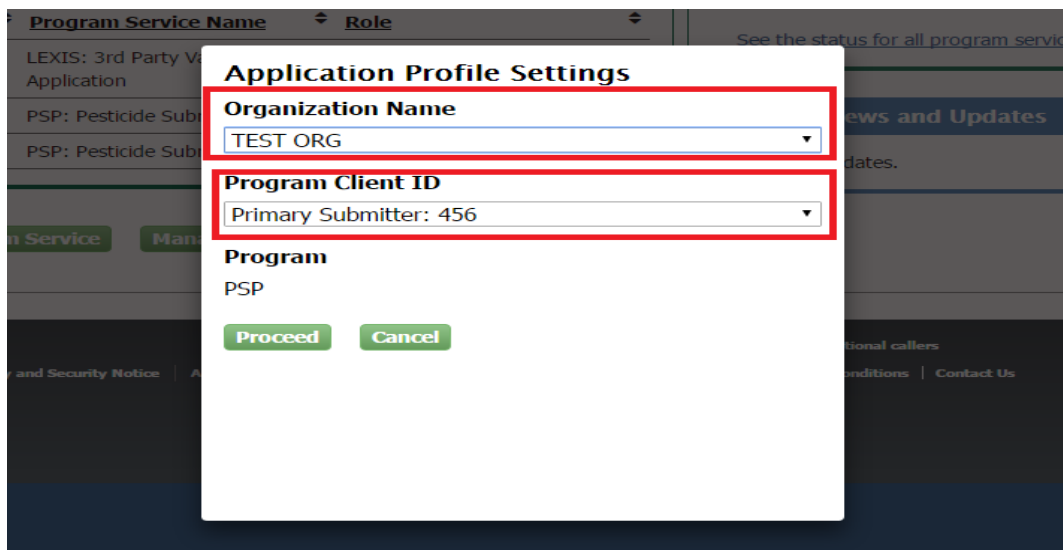
**Exhibit 3-2: MyCDX Screen and Role Link**

**Navigation:** Click a blue role link under the ‘Role’ column to access the Pesticide Submission Portal (PSP) as that role.

**Note:** If you are associated with multiple companies, you will have to choose the organization name and company role/pesticide company number for which you are

submitting. In this case, dropdown boxes will display upon clicking the ‘Role’ link. If you are not associated with multiple companies, proceed to the next section.

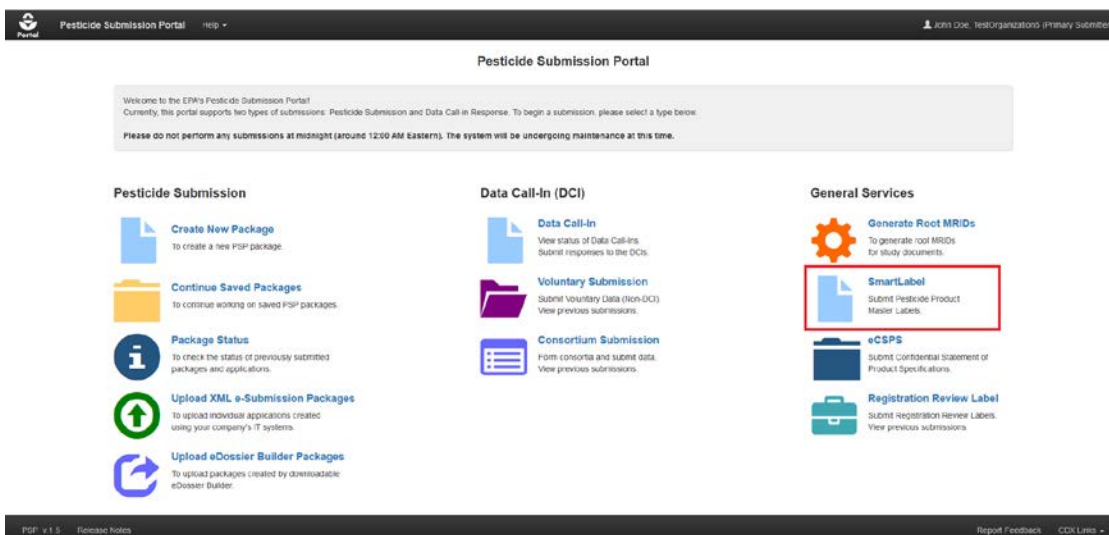
Exhibit 3-3 below displays the organization name and company role/pesticide company number dropdown boxes that appear when you are associated with multiple companies. The pesticide company number is located next to the role within the ‘Program Client ID’ dropdown box. In this case, ‘456’ is the pesticide company number.



**Exhibit 3-3: Choosing Organization Name and Company Role/Pesticide Company Number**

**Navigation:** Choose the organization name, company role/number, and then click the ‘Proceed’ button to enter the PSP application. After clicking ‘Proceed,’ you will be navigated to the PSP ‘Home’ screen.

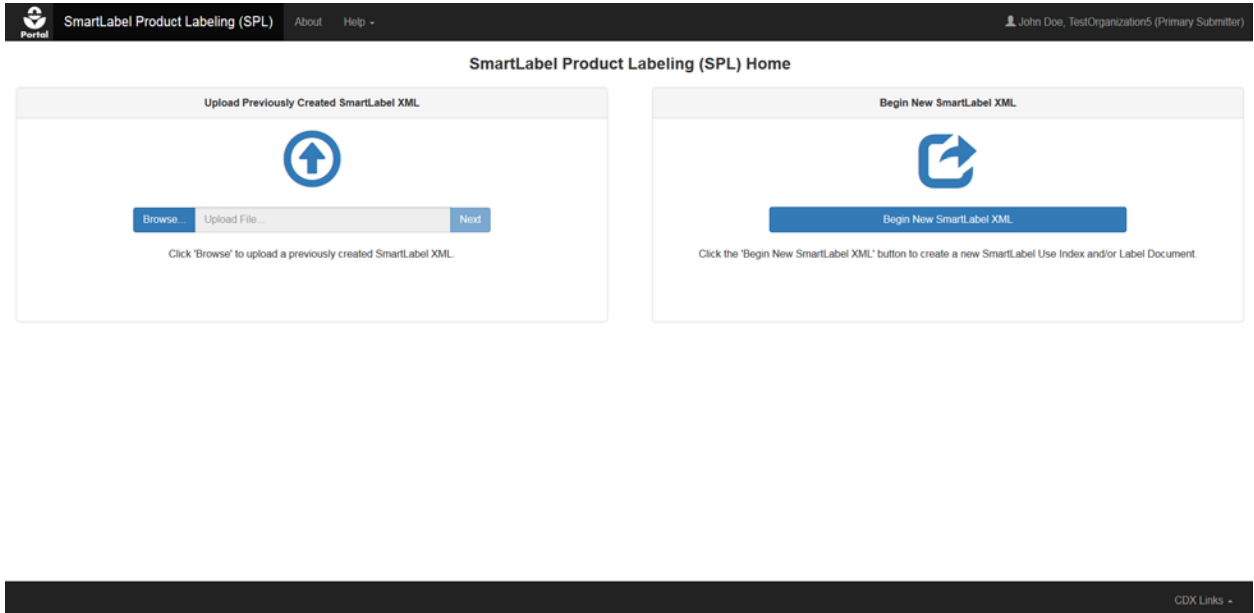
Exhibit 3-4 below shows the PSP ‘Home’ screen and icon where you can access the SmartLabel application.



### Exhibit 3-4: Accessing the SmartLabel application from PSP ‘Home’

**Navigation:** Click the SmartLabel icon on the PSP ‘Home’ screen to access the application and move to the ‘SmartLabel Product Labeling (SPL) Home’ screen.

Exhibit 3-5 shows the ‘SmartLabel Product Labeling (SPL) Home’ screen where you can either ‘Begin New SmartLabel XML’ or ‘Upload Previously Created SmartLabel XML’.



### Exhibit 3-5: Starting a new or uploading an existing SmartLabel XML from SmartLabel ‘Home’

## 3.3 Access the SmartLabel User Guide

Users can access this user guide at any time within the SmartLabel application. To access the user guide, click the ‘Help’ tab in the application header and click the ‘Pesticide Submissions Portal User Guide’ link. Exhibit 3-5 below displays a screen capture of the location of the user guide link within the ‘Document Information’ screen header.

Exhibit 3-6 shows where to access the SmartLabel User Guide from the header in the SmartLabel application.

SmartLabel Product Labeling (SPL) About **Help** View Modes

John Doe, TestOrganization5 (Primary Submitter)

4f97df72-1515-4a22-a7ee-abdb85776aca

Document Information

This provides basic information for the identity of the particular document, its type, title, date and versioning as a member of a document set.

### Document Information

Please enter Package Information in the fields below.

Document Name: 4f97df72-1515-4a22-a7ee-abdb85776i

Company Name: TestOrganization5

Company Number: \*

Company Number: N/A

Registration Number: N/A

Company Number Product Number \*

Select the document type(s) you wish to create, then click the 'Add Document' button.

Product Label

Use Index

Preview XML Preview PDF Save to Local Validate

CDX Links

**Exhibit 3-6: SmartLabel User Guide Link Location**

## 4 SmartLabel Application Actions

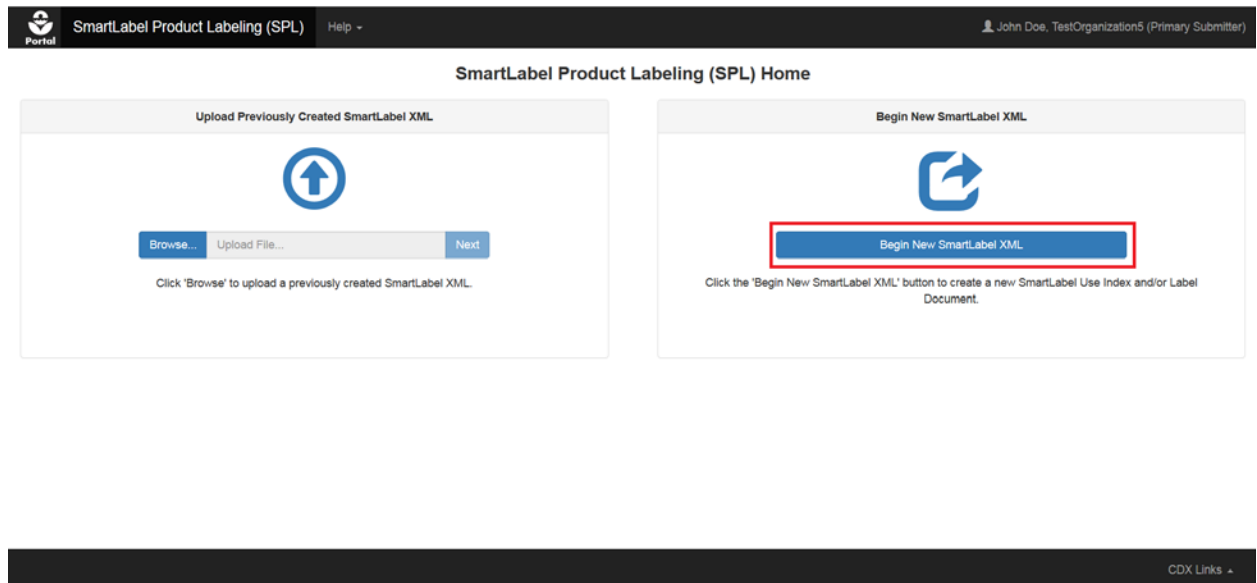
This section describes the process to begin new and upload existing SmartLabel documents. This section will also highlight the universal features found within the SmartLabel application following creating or uploading a SmartLabel document, including all features located within the application header and footer.

### 4.1 Begin New SmartLabel XML

You can begin the document creation process by clicking the ‘Begin New SmartLabel XML’ button on the ‘SmartLabel Product Labeling (SPL) Home’ screen. Clicking this button will bring you to the ‘Document Information’ screen inside the application where you can add a new, blank SmartLabel document.

**Note:** A Product Label and/or Use Index document has not been created until you move to the ‘Document Information’ screen inside the application and add the document to the application; see Exhibit 4-2.

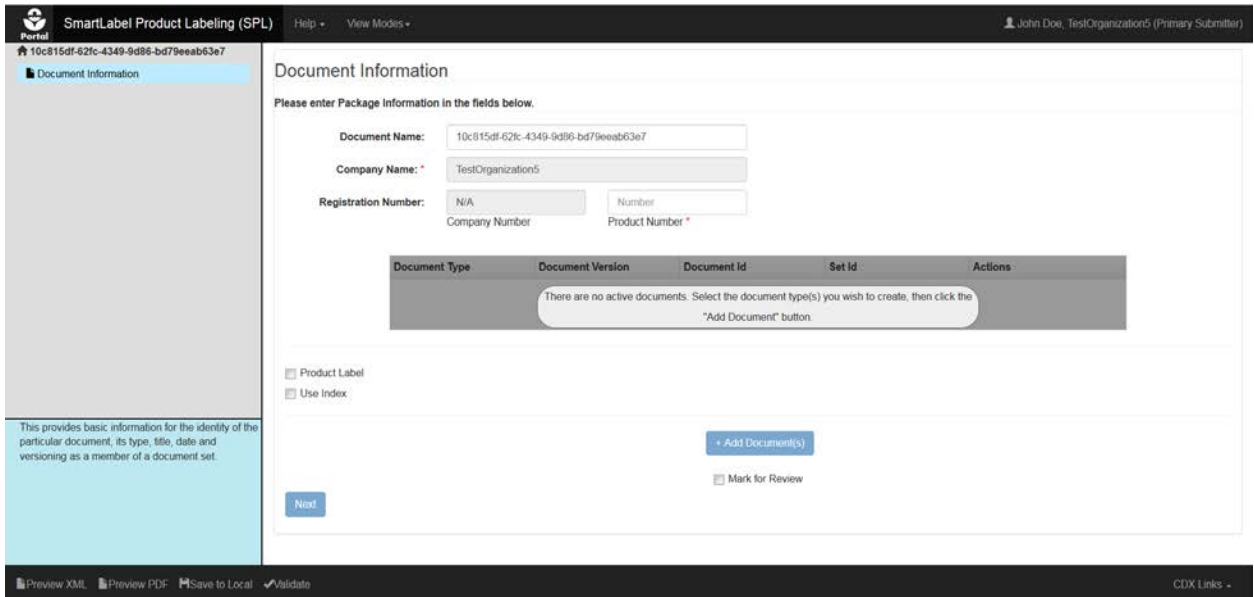
Exhibit 4-1 shows the button to Begin a New SmartLabel XML.



**Exhibit 4-1: Begin New SmartLabel XML button**

**Navigation:** Click the ‘Begin New SmartLabel XML’ button on the SmartLabel ‘Home’ screen to start a new SmartLabel document and move forward to the ‘Document Information’ screen.

Exhibit 4-2 shows the ‘Document Information’ screen of a new, blank SmartLabel document.

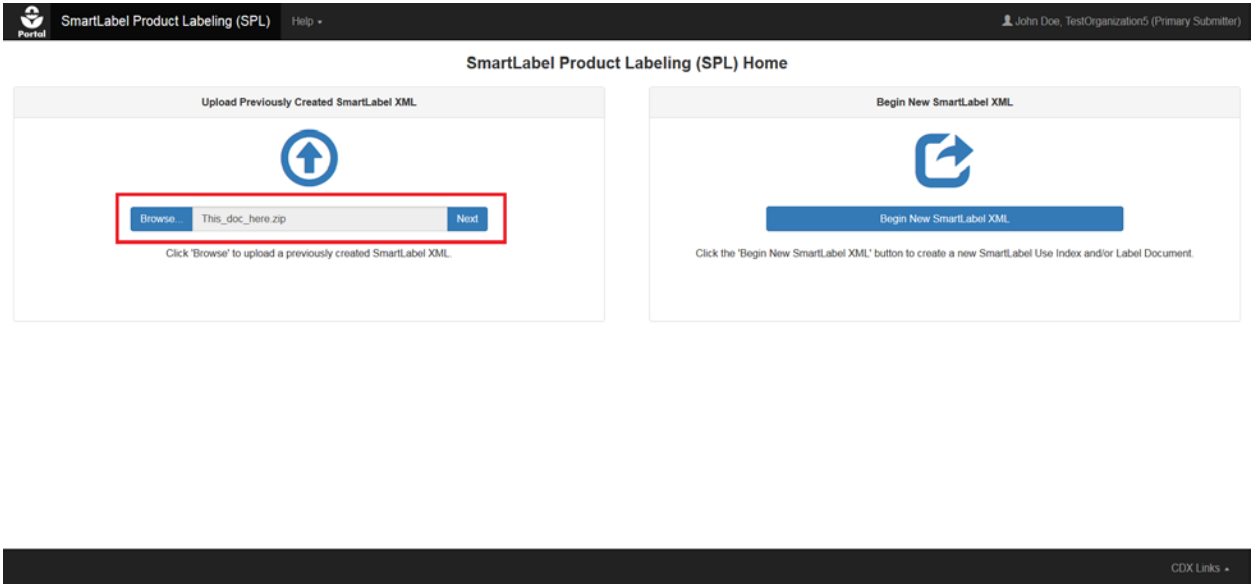


**Exhibit 4-2: ‘Document Information’ screen of a newly created SmartLabel document.**

## 4.2 Upload Previously Created SmartLabel XML

You can upload an existing SmartLabel XML to the application by clicking the ‘Browse’ button on the ‘SmartLabel Product Labeling (SPL) Home’ screen. Clicking this button will generate a local browser window where you can locate and select the existing XML file for upload. Once you have selected the XML file for upload, click the ‘Next’ button on the SmartLabel ‘Home’ screen next to the filename. So long as the XML file is valid, the information contained within the file will upload to the SmartLabel application. Following a successful upload, you are brought to the ‘Document Information’ screen inside the SmartLabel application where your document(s) have been added to the ‘Document Information’ staging table; see Exhibit 4-4.

Exhibit 4-3 shows the filename field and ‘Browse’ and ‘Next’ buttons used in the ‘Upload Previously Created SmartLabel XML’ container.



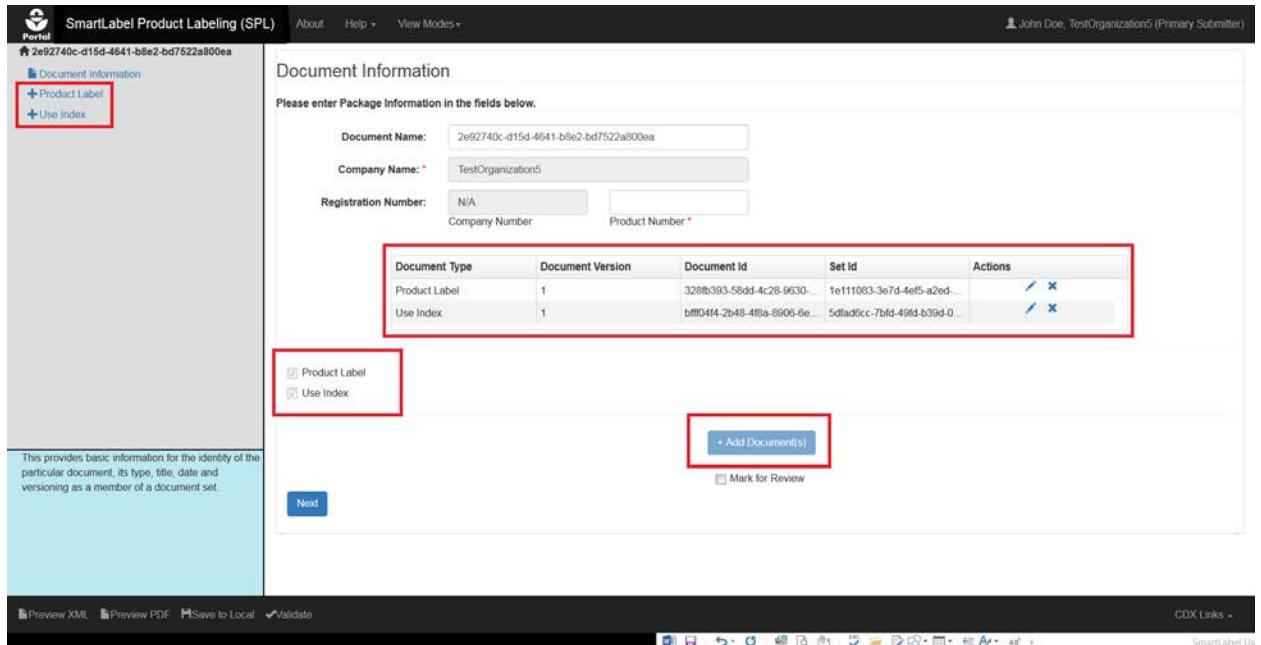
**Exhibit 4-3: The Browse button, filename, and Next button for XML file upload.**

**Navigation:** After selecting the XML file you wish to upload to the application from your local browser window, click the ‘Next’ button to the right of the filename to upload the XML file and move forward to the ‘Document Information’ screen.

### 4.3 Add Document(s)

Once you have successfully created a new, or uploaded an existing, SmartLabel document you will be directed to the ‘Document Information’ screen. Here you can elect to add a Product Label document, a Use Index document, or both by checking the respective check box and clicking the ‘+Add Document(s)’ button. Once a document type has been added, the respective checkbox will remain checked and become inactive to prevent adding more than one of the same document type. The selected document(s) is then added to the Document Information staging table where it can be deleted or the associated HL7 information edited. The respective document type link is also viewable within the Navigation Tree to the left of the screen. All sub-screens for each document are nested behind the respective document link.

Exhibit 4-4 shows the result of adding document types to the SmartLabel application from the ‘Document Information’ screen.



**Exhibit 4-4: Adding document types to the SmartLabel application**

#### 4.4 Edit/Delete Documents

Once a document type is added, you can edit and/or delete that document from the staging table on the ‘Document Information’ screen by clicking the respective icon. Clicking the icon to delete a document will generate a confirmation pop-up window, while clicking the icon to edit a document will generate the ‘Edit Document Information’ window.

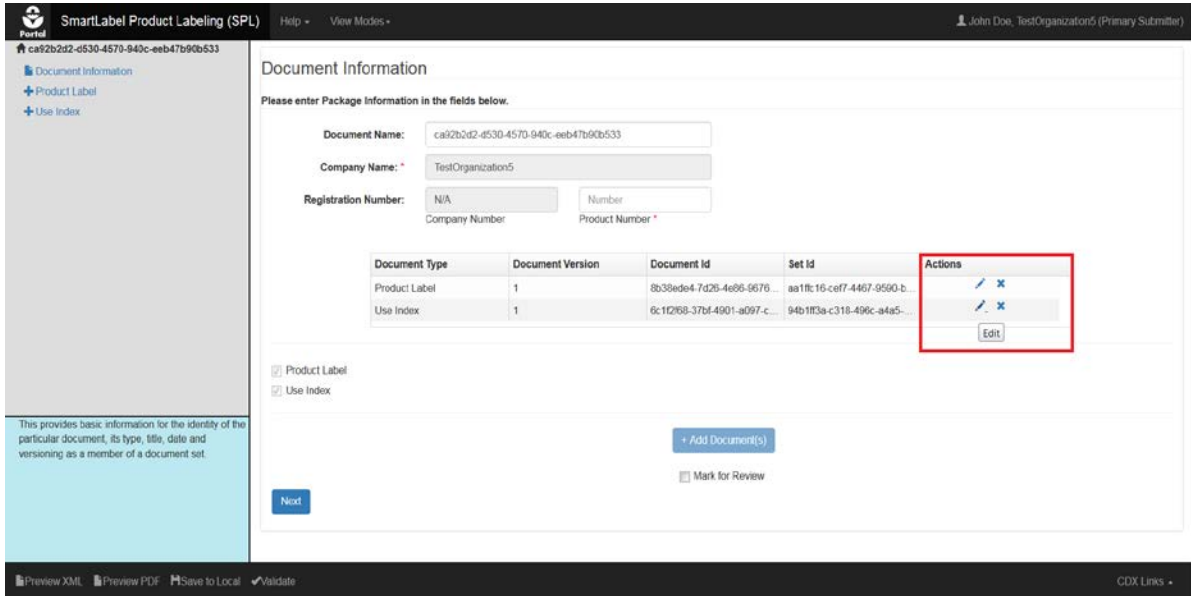
- **Edit Document:** Clicking the respective ‘Edit’ icon for a document allows you to alter the HL7 information for that document. When clicked, the ‘Edit Document Information’ window opens. Within the ‘Edit Document Information’ window you can change the Document ID, Version, Set ID, and Effective Date for the respective document. Clicking ‘Save’ in the window updates the information for the document and closes the window. Clicking ‘Cancel’ closes the window without saving any changes.
- **Delete Document:** Clicking the respective ‘Delete’ icon for a document allows you to delete the document and all of its contents. Before successfully deleting a document you will be prompted to confirm deletion within the pop-up window. Confirming deleting the document will erase the respective document XML and all associated screens from the application. This will also remove all associated screen and sub-screen links from the Navigation Tree.

**Important:** Deleted documents and any associated changes within those documents are unrecoverable unless they have been saved locally, using the universal save function in



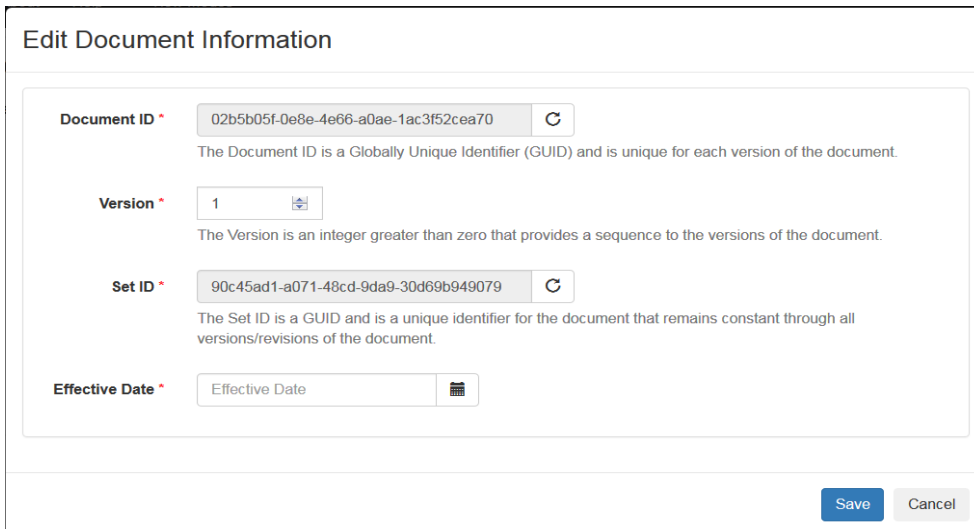
the application footer, prior to deleting. If information and changes have been saved prior to deleting, you will need to upload the related XML to continue work on that document.

Exhibit 4-5 shows the ‘Edit’ and ‘Delete’ icons in the Document Information staging table.



**Exhibit 4-5: ‘Edit’ and ‘Delete’ icons in the Document Information staging table**

Exhibit 4-6 shows the ‘Edit Document Information’ pop-up window to edit HL7 related information.



**Exhibit 4-6: Edit Document Information pop-up window**

**Navigation:** Clicking the ‘Edit’ icon in the ‘Document Information’ staging table will generate the ‘Edit Document Information’ pop-up window.

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## 4.5 Navigation Tree

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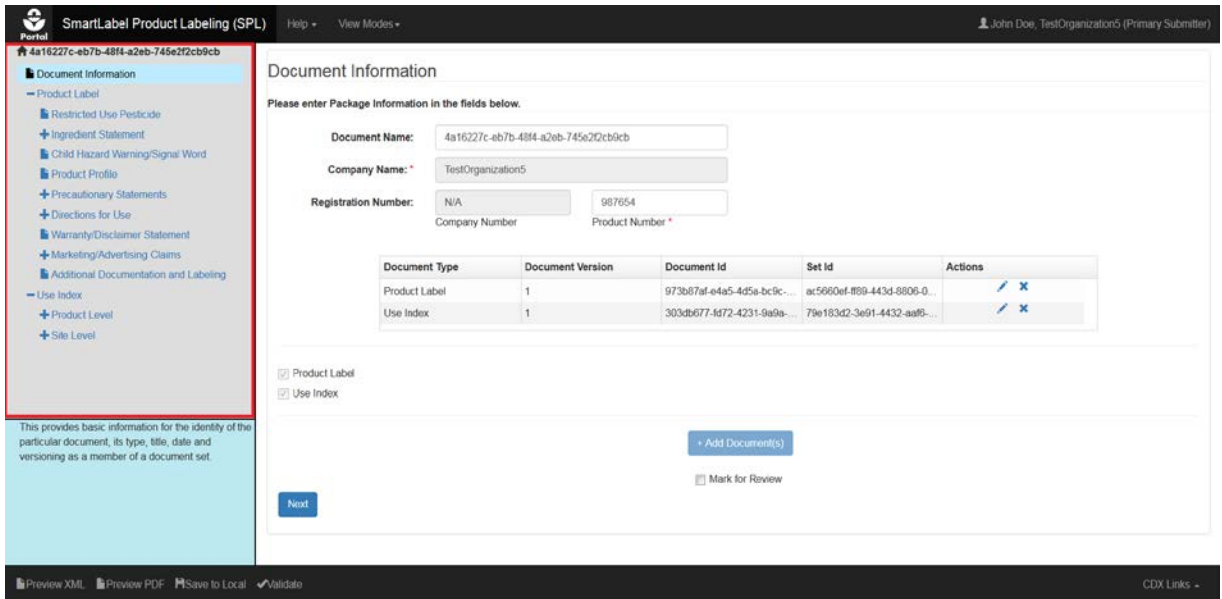
The navigation tree is located on the left side of the screen and contains links to all available screens and sub-screens within each added document. Below the navigation tree you will find per-screen ‘Help Text’ to guide you with the type of data inputs that are expected on each screen.

You can perform the following functions using the navigation tree:

- **Collapse and Expand List of Screen Links:** Some links within the navigation tree include plus (+) and minus (-) signs for expanding and collapsing the list of links. This is to make it easier and less confusing to view the links in the navigation tree. When collapsed, you can click the plus (+) for the respective link to expand that section in the navigation tree and view a list of all relating sub-screen links. When expanded, you can click the minus (-) for the respective link to collapse the list of all relating sub-screen links again.
- **Navigate Between Screens:** Each screen in the application has an associated link within the navigation tree named for the respective screen. To navigate to a particular screen in a document, click on the respective screen link within the navigation tree. Clicking a link in the navigation tree will also highlight the link for the screen you are navigated to. If a link does not have a screen to navigate to, clicking on the respective link will cause no action in the application.

**Important:** Any required or invalid inputs to fields on a screen should be entered or corrected before attempting to leave the current screen. Trying to leave the screen with invalid inputs, or null inputs for required fields, will generate a confirmation prompt when attempting to move away to a separate screen in the application. Within the confirmation window, you can choose to ‘Continue’ or ‘Return to Screen’. Clicking ‘Continue’ will move you to the selected screen and mark the current screen for later review. Clicking ‘Return to Screen’ will close the confirmation prompt on the current screen for you to make any corrections needed. Returning to the current screen will mark all fields with validation errors in red text. This is to make it easier to locate issues on a screen where validation errors exist.

Exhibit 4-7 displays the navigation tree with both document types added to the application.



**Exhibit 4-7: Navigation Tree**

**Navigation:** Given there is a screen to navigate to, clicking a link in the navigation tree will bring you to that screen. The screen where you are located in the application will be highlighted in the navigation tree.

## 4.6 Application Header Links

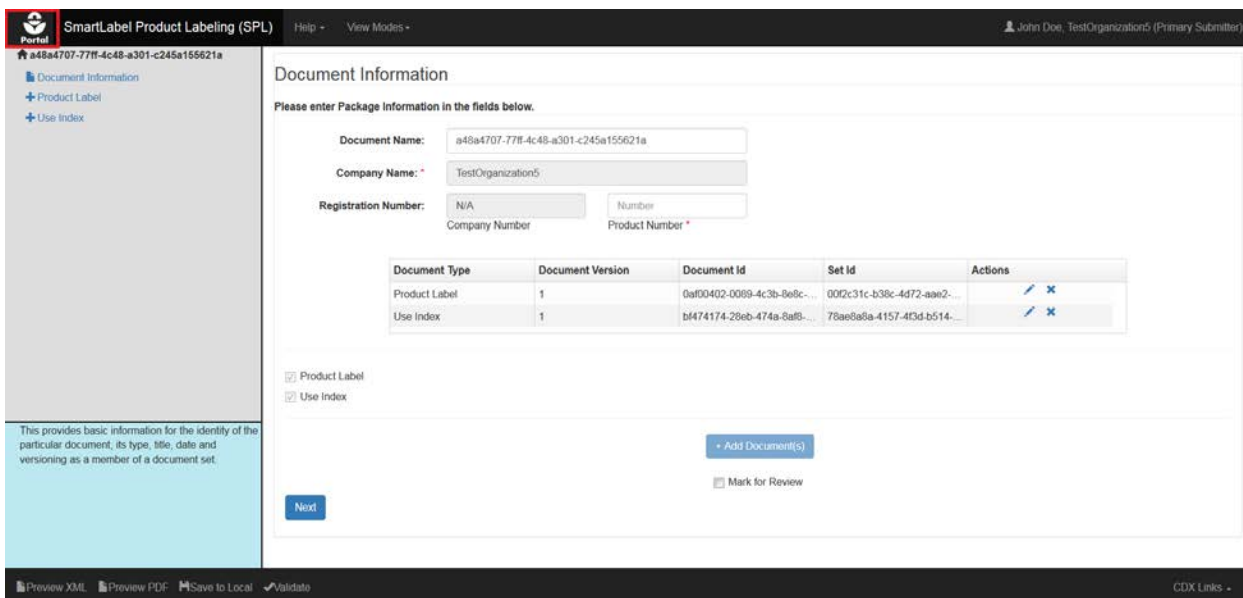
The application header is universal to every screen and is located at the top of your screen while working inside the SmartLabel application. There are three links you can use in the application header to leave the SmartLabel application, including:

- Portal Icon:** The 'PSP' icon in the far left corner of the application header can be accessed at any point while using the SmartLabel application. Clicking the icon will generate a pop-up window for you to confirm leaving the application, with or without saving, or return you to your current screen. Confirming leaving the application will guide you out of your current session and back to the Pesticide Submission Portal; see Exhibit 3-4.
- SmartLabel Product Labeling (SPL):** The 'SmartLabel Product Labeling (SPL)' link in the application header can be accessed at any point while working on a document inside the SmartLabel application. Clicking the icon will generate a pop-up window for you to confirm leaving the application, with or without saving, or return you to your current screen. Confirming leaving the application will guide you out of your current session and back to the SmartLabel 'Home' screen; see Exhibit 3-5.
- Logout:** The Logout link in the far right corner of the application header can be accessed at any point while using the SmartLabel application. The link itself is your Name, Organization Name, and SmartLabel application role as they exist in

CDX. Clicking the link will generate a pop-up window for you to confirm logging out of CDX or canceling the action. Canceling the Logout of CDX will return you to your current screen. Confirming the Logout of CDX will end your current SmartLabel and CDX sessions and bring you to the CDX Logout screen without saving.

**Important:** If you intend to save progress on a document prior to using the ‘Logout’ link to logout of your current CDX session, you **MUST** do so from the application footer using the ‘Save to Local’ action button; see Exhibit 4-8. Using the ‘Logout’ link will not prompt a save prior to logging you out of your current CDX session. You should save your progress using the ‘Save to Local’ action button in the application footer before logging out of CDX using the ‘Logout’ link. Failure to do so will result in lost progress on your SmartLabel document.

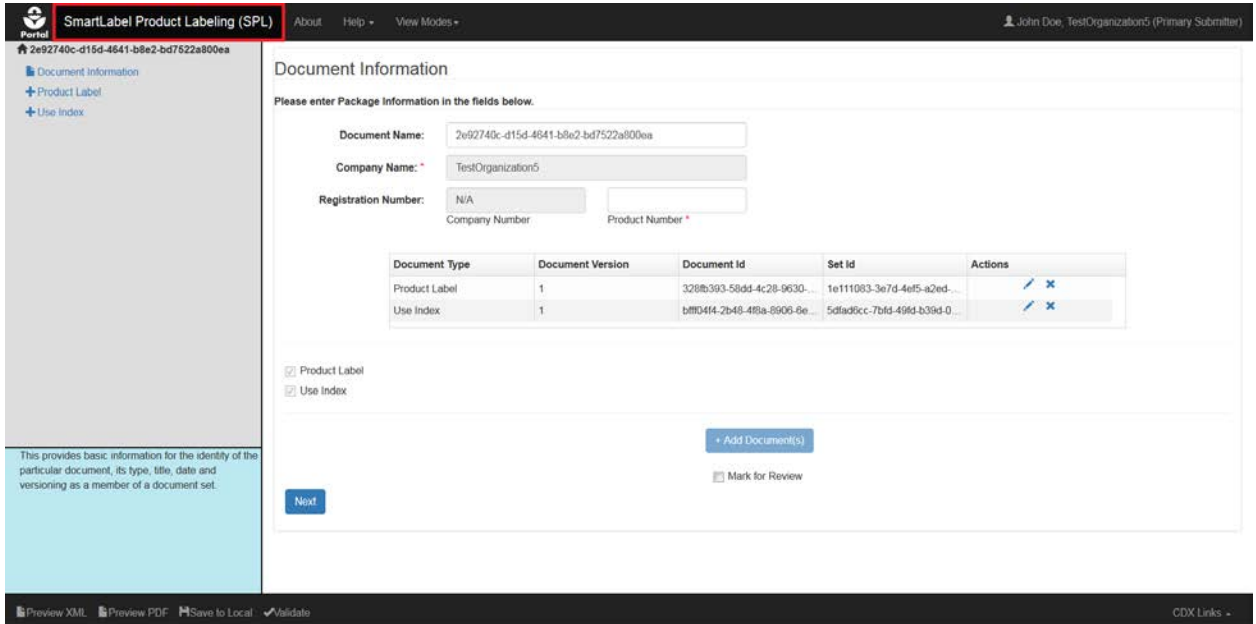
Exhibit 4-8 shows the ‘Portal’ icon for returning to the Pesticide Submission Portal.



**Exhibit 4-8: Pesticide Submission Portal (PSP) link**

**Navigation:** Click the ‘Portal’ icon to navigate back to the PSP ‘Home’ screen at any point while in the application.

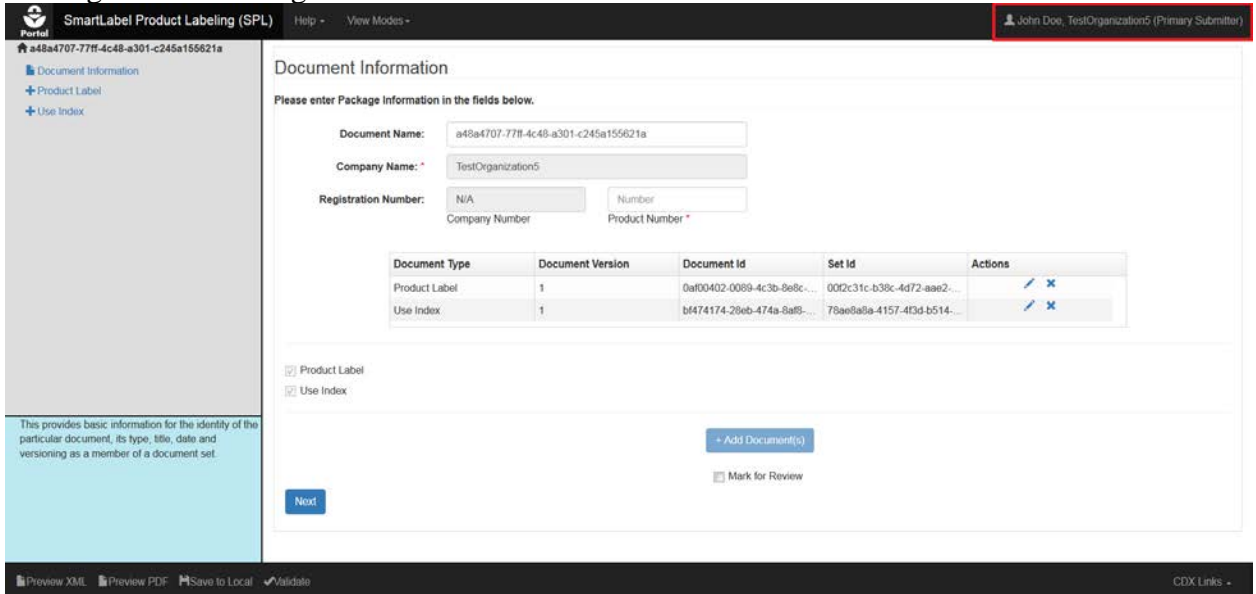
Exhibit 4-9 shows the ‘SmartLabel Product Labeling (SPL)’ link for returning to the SmartLabel ‘Home’ screen.



**Exhibit 4-9: SmartLabel Product Labeling (SPL) link**

**Navigation:** Click the ‘SmartLabel Product Labeling (SPL)’ link to navigate back to the SmartLabel ‘Home’ screen at any point in the application.

Exhibit 4-10 shows the ‘Logout’ link for logging out the current CDX session and moving to the CDX logout screen.



**Exhibit 4-10: Logout Link**

**Navigation:** Click the ‘Logout’ link to end your CDX session and navigate to the CDX ‘Logout’ screen at any point while in the application.

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## 4.7 Application Footer Actions

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The application footer is universal to every screen and is located at the bottom of your screen while working inside the SmartLabel application. There are several actions you can perform using the buttons in the application footer, including:

- **Preview XML:** Click the ‘Preview XML’ button at any point while in the application to generate the XML view of your added documents in a new browser tab. Each document added to the application will generate a separate browser tab for each document XML view; i.e. one new browser tab is generated for the Product Label document XML, while a separate new browser tab is generated for the Use Index document XML given the document has been added to the application.
- **Preview PDF:** Click the ‘Preview PDF’ button at any point while in the application to generate the PDF view of your added documents in a new browser tab. Each document added to the application will generate a separate browser tab for each document PDF view; i.e. one new browser tab is generated for the Product Label document PDF, while a separate new browser tab is generated for the Use Index document PDF given the document has been added to the application.
- **Save to Local:** Click the ‘Save to Local’ button at any point while in the application to save a version of your document(s) locally, in XML format. Clicking the button will zip the file(s) and place them in your local ‘Downloads’ folder. If you have altered the ‘Document Name’ field on the ‘Document Information’ screen the Zip filename will be the one you have used there. Otherwise, the Zip filename will be the random GUID assigned to the document at the time of the save. Each document added to the application will save as a separate XML file inside the Zip file; i.e. there is one Product Label document XML file and a separate Use Index document XML file, given the document has been added to the application.
- **Validate:** Click the ‘Validate’ button at any point while in the application to check for validation errors throughout all screens in the document(s) added to the application. A validation error is generated for each invalid input made in a document or when a required field is left blank. Clicking the button will generate a pop-up window to list any validation errors. Links are provided in the pop-up window to navigate you to the screen(s) where the error(s) are located. Refer to **Section 9** for additional guidance about the validation process.
- **CDX Links:** Click the ‘CDX Links’ button at any point while in the application to generate the ‘CDX Links’ pop-up menu from the application footer. Clicking the web links within the pop-up menu will open a new tab in the browser and navigate you to the respective web screen.

If you click the ‘CDX Homepage’ link, you will be taken to the CDX Homepage at:

- <http://www.epa.gov/cdx/>

If you click the ‘MyCDX Homepage’ link, you will be taken to the CDX Login at:

- <https://dev.epacdx.net/CDX/MyCDX>

If you click the ‘EPA Homepage’ link, you will be taken to the EPA Homepage at:

- <http://www.epa.gov/>

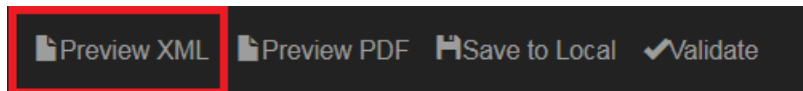
If you click the ‘Terms and Conditions’ link, you will be taken to the CDX Terms and Conditions screen at:

- <https://cdx.epa.gov/Terms>

If you click the ‘Privacy Notice’ link, you will be taken to the CDX Privacy and Security Notice screen at:

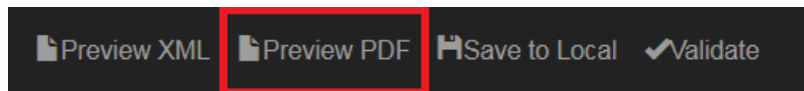
- <https://cdx.epa.gov/privacy.asp>

Exhibit 4-11 shows the ‘Preview XML’ button to generate an XML view of your document(s).



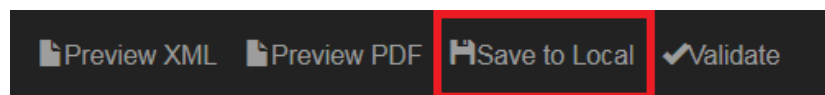
**Exhibit 4-11: Application Footer Actions- Preview XML**

Exhibit 4-12 shows the ‘Preview PDF’ button to generate a PDF view of your document(s).



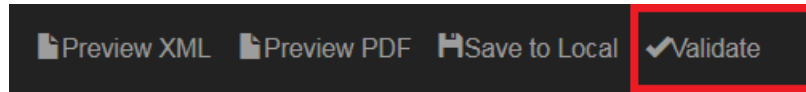
**Exhibit 4-12: Application Footer Actions- Preview PDF**

Exhibit 4-13 shows the ‘Save to Local’ button to save a copy of your document(s) on your local machine.



**Exhibit 4-13: Application Footer Actions- Save to Local**

Exhibit 4-14 shows the ‘Validate’ button to check validation errors throughout the entire document(s).



**Exhibit 4-14: Application Footer Actions- Validate**

Exhibit 4-15 below shows the screen capture of the application footer ‘Help’ links.



**Exhibit 4-15: Application Footer Actions- CDX Links**

**Navigation:** Clicking a link in the ‘CDX Links’ menu will generate a new browser tab and bring you to the webpage for the respective link.



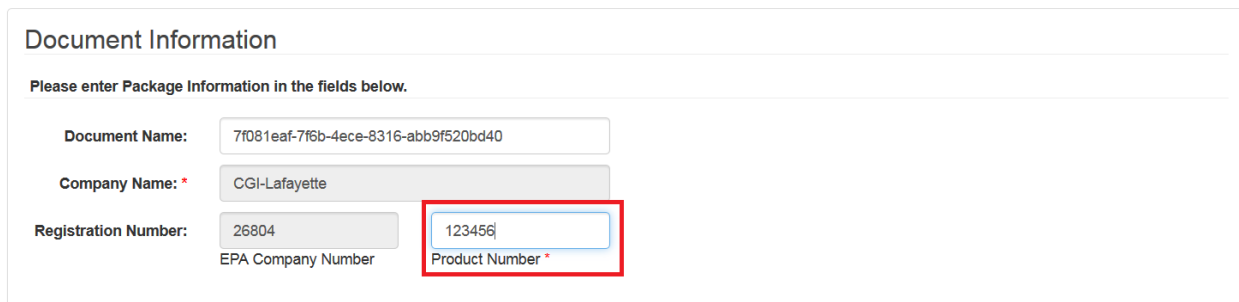
## 5 Entering Information Using the SmartLabel Application

There are a variety of ways to input data using the SmartLabel application. The methods used for entering data are determined by the type of information that is being provided in either the Product Label or Use Index part of the application. Those methods include: section text with formatting controls; simple text of numeric and/or alphanumeric values; single-select and multi-select menu; Active Ingredient search/select; combination data entry; tree multi-selections.

### 5.1 Simple Text

Simple text fields can be found in the Product Label document and the Use Index document throughout the entire application. Some text fields allow alphanumeric and special characters, while some are restricted to numeric characters only. The formatting requirements of a text field are what governs the allowed inputs to that field. When invalid inputs are made to a text field, you will be notified by two methods immediately upon making the invalid input: the text in the field will turn red and an error message will display below the field. The error message will explain why the entry to the field is invalid. Correcting the issue will cause the message to go away and the red text to return to black. To enter text, click into the respective text field and type the information you wish to add to the document. To remove text from the document, click into the field and erase the text.

Exhibit 5-1 shows the ‘Product Number’ text field on the ‘Document Information’ screen.



The screenshot shows a form titled "Document Information" with the instruction "Please enter Package Information in the fields below." The form contains the following fields:

- Document Name:** 7f081eaf-7f6b-4ece-8316-abb9f520bd40
- Company Name: \*** CGI-Lafayette
- Registration Number:** 26804 (EPA Company Number)
- Product Number \*** 123456 (highlighted with a red box)

**Exhibit 5-1: Simple Text Example**

### 5.2 Section Text

Section Text can be added to the SmartLabel application across many screens within the Product Label document, exclusively. Using the Section Text area allows you to add, edit and format text entered by use of the formatting controls at the top of the text area. Those controls also give the ability to insert pictures, links, and tables where needed. The purpose of adding and properly formatting information in the Section Text areas is with the idea that it will be displayed somewhere on the Product Label. All screens within the Product Label document allow data entry using a Section Text area and formatting controls, excluding the ‘Additional Documentation and Labeling’ screen.

Required Section Text fields are viewable when landing on the ‘Product Label’ screen. Optional Section Text fields are hidden behind buttons labeled for the respective section of the document. Clicking a button for a section will expand the Section Text area below when it is collapsed and

collapse an already expanded Section Text area. Note: collapsing a Section Text area that contains inputs will not erase those inputs from the Product Label document. That information will still appear in the relating XML file.

Exhibit 5-2 (scroll 1) shows the button to expand/collapse the ‘Ingredient Statement’ section text area on the ‘Ingredient Statement’ screen.

Ingredient Statement

Please enter Active Ingredients below

Active Ingredient(s) \*

Systematic Name	% Active Ingredient	Factoring Term Ingredient	% Factoring Term	Actions
There are no Active Ingredients. Click the "Add Active Ingredient" button to add.				

+ Add Active Ingredient

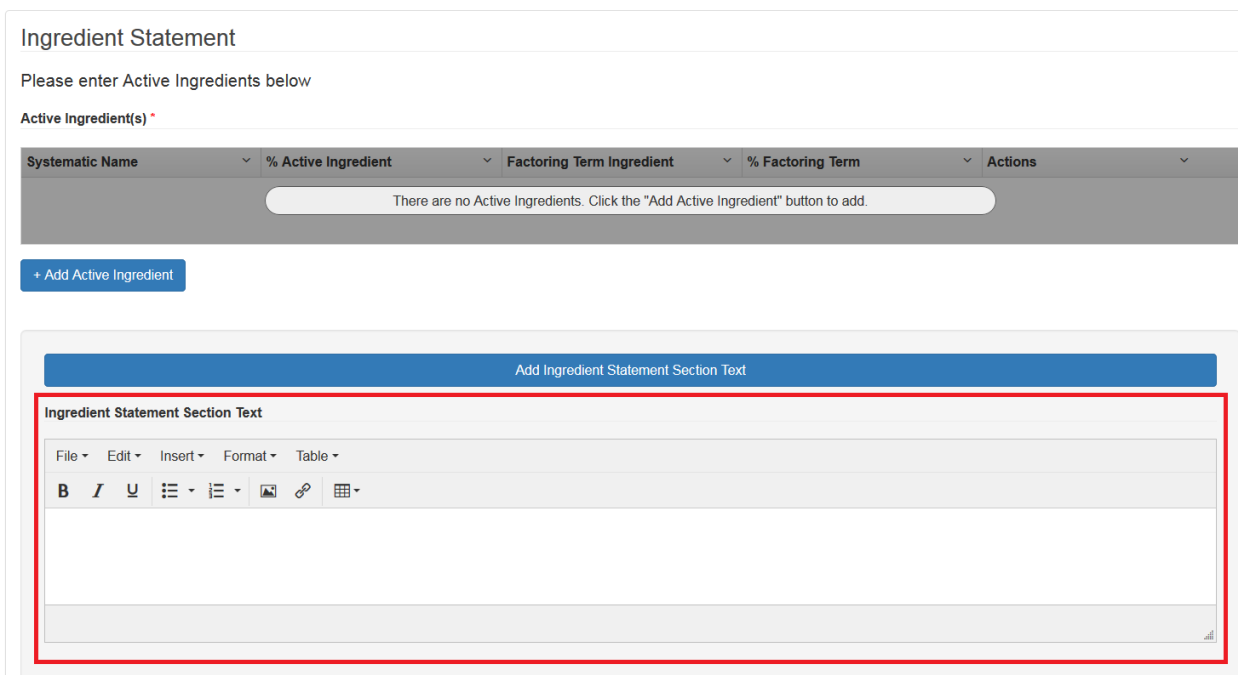
Add Ingredient Statement Section Text

Add Identified Inert Statement Section Text

Add Deterioration/Expiration Statement Section Text

**Exhibit 5-2 (scroll 1): Section Text expand/collapse button**

Exhibit 5-3 (scroll 2) shows the ‘Ingredient Statement’ section text area on the ‘Ingredient Statement’ screen.



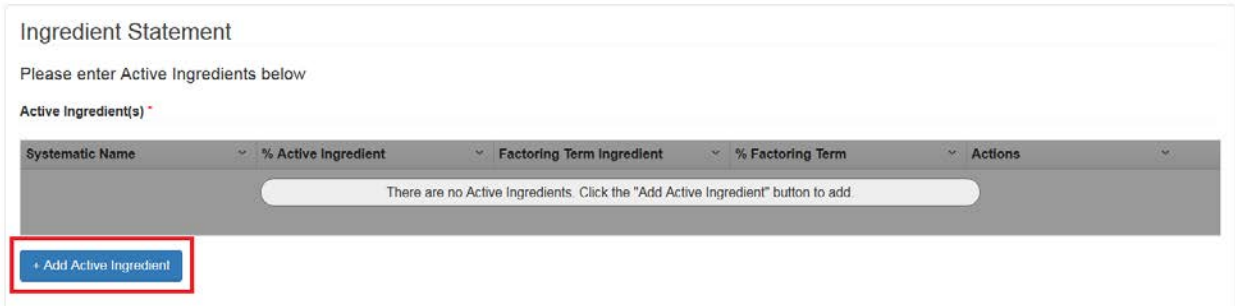
**Exhibit 5-3: Section Text area**

### 5.3 Active Ingredients and Factoring Term Ingredients Search/Select

There are two screens within the SmartLabel application where you can use Substance Registry Services (SRS) to search for and select Active Ingredients and Factoring Term Ingredients to add to your documents. They are located on the ‘Ingredient Statement’ screen in the Product Label document and the ‘Product Identification’ screen in the Use Index document. Information added to the tables on these screens is shared between the two documents when both document types are present in a session; i.e. adding an Active Ingredient to the table on one screen will also add that Active Ingredient to the sister screen in the opposite document.

Located under the Active Ingredient staging table is a button labeled, ‘+Add Active Ingredient’. Click the button from either screen listed above to generate the SRS modal and search for/select your active ingredient(s).

Exhibit 5-4 shows the ‘+Add Active Ingredient’ button used to generate the SRS Search modal for adding active ingredients to the staging table.



**Exhibit 5-4: ‘+Add Active Ingredient’ button for Active Ingredient staging table**

Once inside the SRS modal, you can search for active ingredients by two methods; Name or CAS Number. Choose your search method by selecting the appropriate radio button. If searching by name enter at least the first three letters of the Chemical, Common, EPA, or other approved name and click the ‘Search’ button below. Note: the ‘Search’ button is not active until at least the first three letters of the name are entered. Entering a less exact search name will produce a broader list of results. If searching by CAS Number you must enter the complete CAS Number, with or without dashes. Entering any value other than an exact match will not produce any

results given the number does not exist. Entering an exact match should produce a single result in the results table below for a CAS Number search.

Exhibit 5-5 shows the radio buttons for selecting your SRS search method and the inactive 'Search' button.

### Active Ingredient

Ingredient

Enter information for the field you wish to search against

**Name**  
Search by Chemical, Common, EPA, or other approved name

**CAS Number**  
Search by CAS Number (must be an exact match).

Initial search string must be 3 characters or longer

Search

**Exhibit 5-5: SRS Search methods and inactive 'Search' button**

Given your search has produced results, you can make your Active Ingredient selection by checking the box next to the respective ingredient name. Selecting Active Ingredient from the list of results will add the respective Systematic Name and the associated SRS Tracking Number in read-only text below the results table.

Exhibit 5-6 shows the active ingredient chosen from the list of results and relating Systematic Name and SRS Tracking Number in read-only text below.

**Search Results**

✓	CAS Number	EPA Registry Name	Systematic Name
✓	8008-51-3	Camphor oil	Oils, camphor
✓	8002-66-2	German chamomile oil	Oils, chamomile, German
✓	8013-10-3	Cade oil	Oils, cade
✓	8037-19-2	Tobacco oil	Oils, tobacco
✓	90640-86-1	Heavy coal tar distillates	Distillates (coal tar), heavy oils
✓	8006-78-8	Bay oil	Oils, bay
✓	8016-36-2	Olibanum oil	Oils, olibanum
✓	8006-80-2	Sassafras oil	Oils, sassafras
✓	132538-94-4	Citrus sinensis orange juice oil	Oils, orange-juice, Citrus sinensis
✓	8008-79-5	Spearmint oil	Oils, spearmint
✓	8002-09-3	Pine oil	Oils, pine

**Active Ingredient**

158105      Oils, camphor

**Percent Active Ingredient \***    50    %

Add Percent Factoring Term

OK Cancel

**Exhibit 5-6: Selected search result and relating read-only selection**

Following your selection, you must enter the ‘Percent Active Ingredient’ in the bottom of the modal. The ‘OK’ button will not activate until a numeric value of 100 or less is entered here. This will prevent you from finalizing your selection and adding it to the staging table.

Exhibit 5-7 shows the ‘Percent Active Ingredient’ text field.

**Active Ingredient**

158105      Oils, camphor

**Percent Active Ingredient \***    50    %

Add Percent Factoring Term

OK Cancel

**Exhibit 5-7: ‘Percent Active Ingredient’ required field and active ‘OK’ button**

Checking the ‘Add Percent Factoring Term’ checkbox will expand the modal and allow you to input information for the respective Factoring Term Ingredient. Adding a Factoring Term Ingredient uses the same method as searching for and selecting an Active Ingredient in the SRS modal. You cannot add a Factoring Term Ingredient without first selecting its parent Active Ingredient.

Exhibit 5-8 shows the ‘Add Percent Factoring Term’ checkbox as being checked and the ‘Factoring Term’ search generated below.

**Active Ingredient**

**Percent Active Ingredient \***

**Add Percent Factoring Term**

**Factoring Term**

---

**Enter information for the field you wish to search against**

**Name**  
Search by Chemical, Common, EPA, or other approved name

**CAS Number**  
Search by CAS Number (must be an exact match).

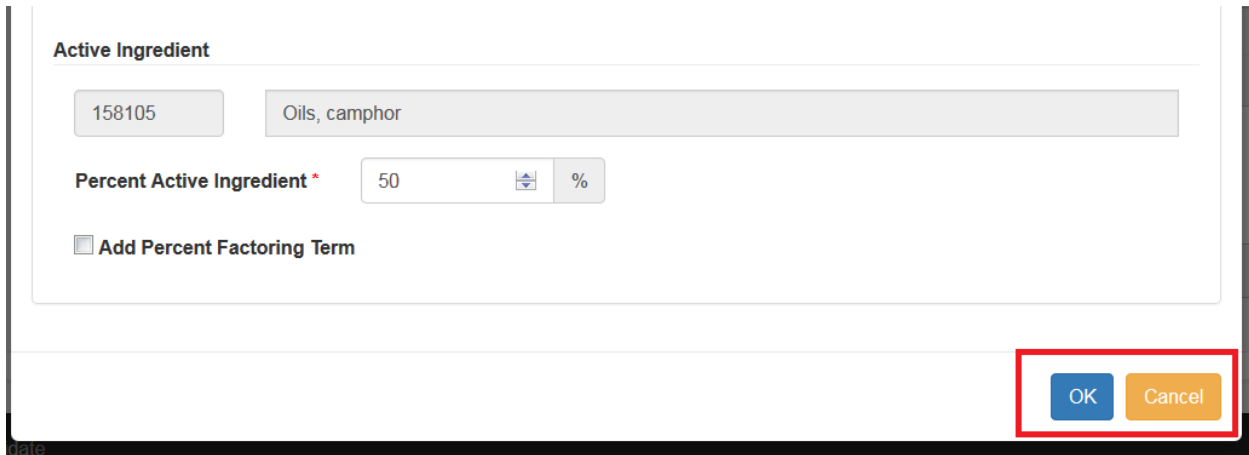
Initial search string must be 3 characters or longer

**Exhibit 5-8: ‘Add Percent Factoring Term’ checkbox and ‘Factoring Term’ search**

Clicking the ‘Cancel’ button in the modal at any point will close the modal and bring you back to the parent screen without saving any new information. Clicking the active ‘OK’ button in the

modal will close the modal and save your inputs to the Active Ingredient staging table on the parent screen.

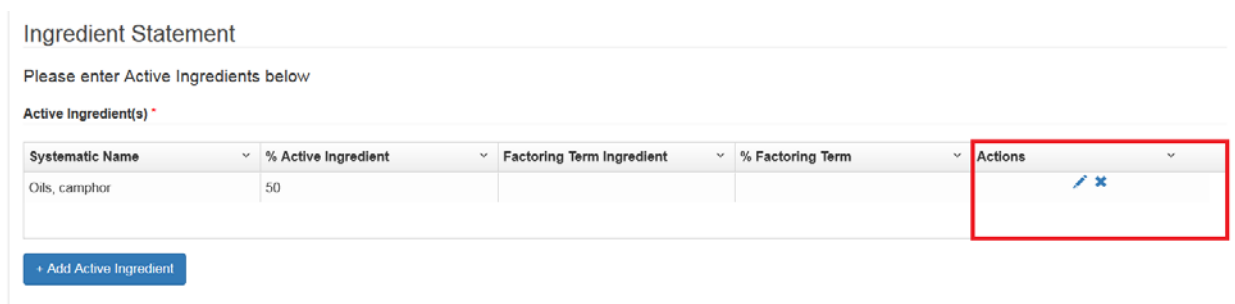
Exhibit 5-9 shows the active ‘OK’ and ‘Cancel’ buttons at the bottom of the SRS Search modal.



**Exhibit 5-9: ‘OK’ and ‘Cancel’ buttons within SRS search modal**

You can ‘Edit’ or ‘Delete’ active ingredients from the staging table by clicking the associated icon for the respective active ingredient. Clicking to ‘Edit’ an active ingredient will generate the ‘Active Ingredient’ modal, while clicking to ‘Delete’ an active ingredient will generate a prompt to confirm deleting the active ingredient. Again, any changes in the staging table or to the active ingredients will be shared between the sister screens.

Exhibit 5-10 shows the ‘Edit’ and ‘Delete’ icons in the ‘Active Ingredient’ staging table for the respective active ingredient.



**Exhibit 5-10: ‘Edit’ and ‘Delete’ active ingredient icons**

## 5.4 Single-Select and Multi-Select Menu

Single-select and Multi-select menus can be found throughout the entire application within both the Product Label document and the Use Index document. Both menu selection methods pull terminology from set picklist terms. Single-select menus allow you to add a chosen term only once. This is because only one term is allowed for that data element per EPA standard. Multi-select menus allow you to add all chosen terms from that picklist which apply to your product.



Single-select and Multi-select menus operate in much the same way; the only difference being that single-select menus only allow one term to be added for a data element, while multi-select menus allow multiple.

### 5.4.1 Single-Select

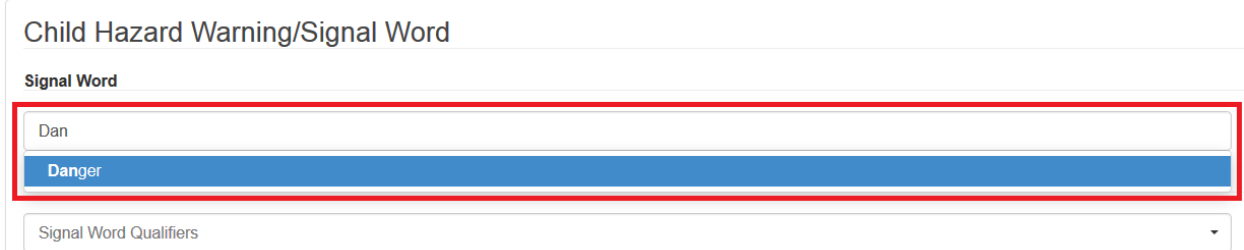
When adding a term from a single-select menu, you must click into the available field. Clicking into the available field will produce a drop-down of the available terms you may add to your document. If the list is long, or you cannot find your term immediately, you may scroll through the list of terms or type the term you are looking for into the field. Typing the term into the field will filter the list down as you type. Once you have located the correct term from the list clicking on the term, or highlighting the term and pressing 'Enter', will add that term to your document. You can change the term by clicking into the field and making a new selection. To remove the term from your document, click the 'X' icon in the field next to the term.

Exhibit 5-11 shows the single-select menu for 'Signal Word' on the 'Child Hazard Warning/Signal Word' screen in the Product Label document.



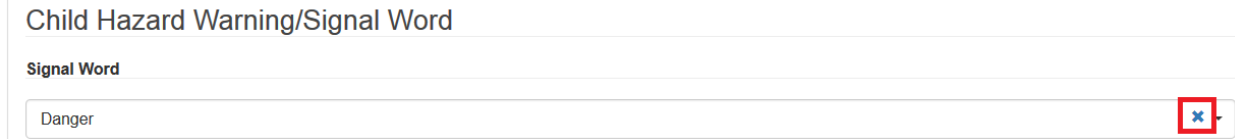
**Exhibit 5-11: Single-select menu item drop-down clicking into the available field**

Exhibit 5-12 shows the filtered view of the single-select menu for 'Signal Word' on the 'Child Hazard Warning/Signal Word' screen in the Product Label document.



**Exhibit 5-12: Filtered menu view when typing into the available field**

Exhibit 5-13 shows the ‘Delete’ icon for removing a term that has been added.



The screenshot shows a form with the following structure:

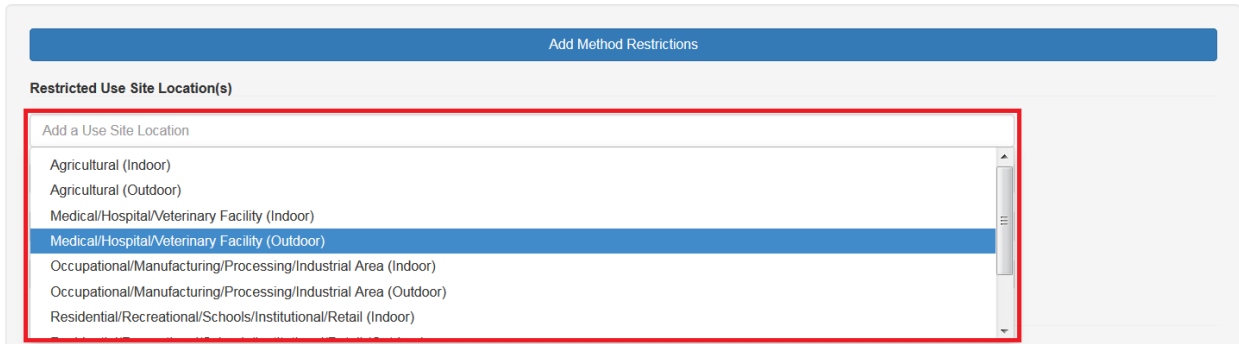
- A header field containing the text "Child Hazard Warning/Signal Word".
- A sub-label "Signal Word" positioned above a text input field.
- The text input field contains the word "Danger".
- To the right of the input field is a small square button with a red border and a blue 'X' icon, used for deleting the term.

**Exhibit 5-13: ‘Delete’ icon for removing a term from a document**

#### 5.4.2 Multi-select

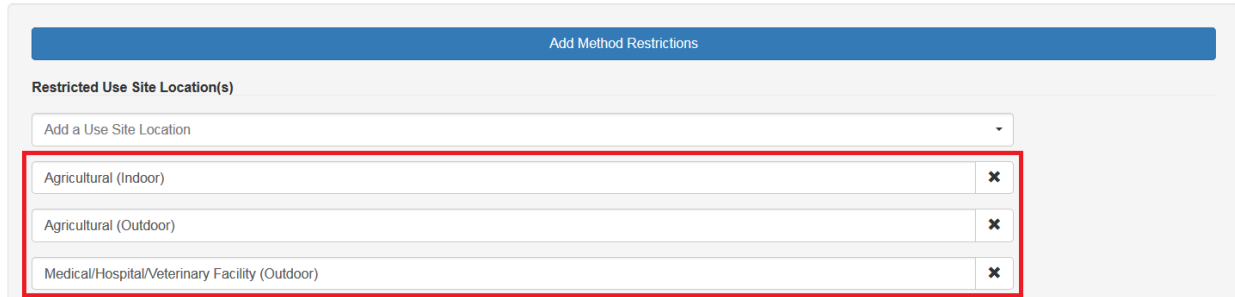
When adding a term from a multi-select menu, you must click into the available field. Clicking into the available field will produce a drop-down of the available terms you may add to your document. If the list is long, or you cannot find your term immediately, you may scroll through the list of terms or type the term you are looking for into the field. Typing the term into the field will filter the list down as you type. Once you have located the correct term from the list clicking on the term, or highlighting the term and pressing ‘Enter’ will add that term to your document below the multi-select menu. To add another term, click into the same multi-select field again. This will again produce a drop-down of the available terms you may add to your document. To remove a term from your document, click the ‘X’ icon in the field next to the respective term.

Exhibit 5-14 shows the multi-select menu for ‘Restricted Use Site Location(s)’ on the ‘Restrictions/Limitations’ screens across the ‘Use Index’ document.



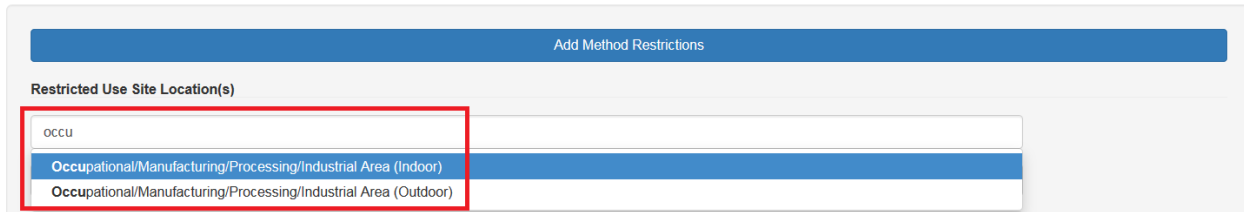
**Exhibit 5-14: Multi-select menu item drop-down clicking into the available field**

Exhibit 5-15 shows multiple terms added to the same ‘Restricted Use Site Location(s)’ data element.



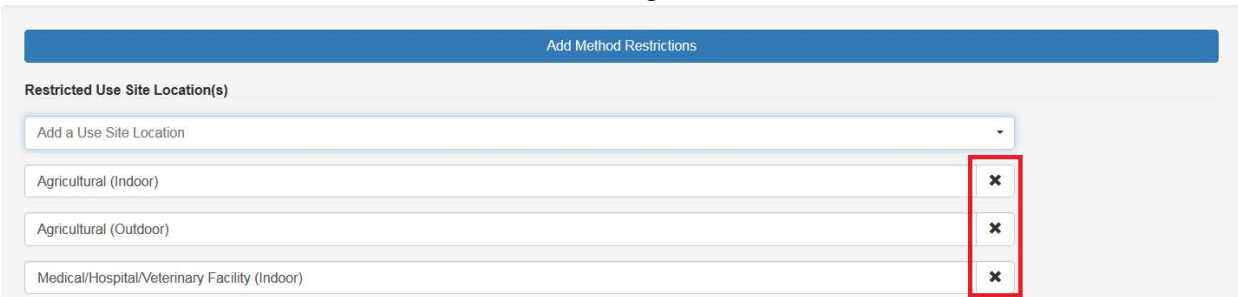
**Exhibit 5-15: Multiple terms added to the ‘Restricted Use Site Location(s)’ data element**

Exhibit 5-16 shows the filtered view of the multi-select menu for ‘Restricted Use Site Location(s)’ data element.



**Exhibit 5-16: Multi-select menu filtered view**

Exhibit 5-17 shows the ‘Delete’ icons for removing terms that have been added.



**Exhibit 5-17: ‘Delete’ icons for removing terms from a document**

Note: While adding duplicates of the same term using a multi-select menu is possible, it is not advised. You should delete any duplicated terms listed using the available method.

## 5.5 Multi-Select Tree Menu

There are two instances in the SmartLabel application where you might encounter a multi-select tree menu. One is for Geographic Area Restrictions on all levels of the Use Index document. The other is for Use Sites on either the ‘Use Site Application Instructions’ screen in the Product Label document or on the linked ‘Use Site Attributes’ screen in the Use Index document. Both multi-select trees employ checkboxes to make selections for the purpose of moving those selections to the desired container on the screen.

### 5.5.1 Geographic Area Restrictions

The Geographic Area Restrictions multi-select tree is hidden by preliminary statements at the top of the ‘Restrictions/Limitations’ screens at each level. Clicking in the first box, ‘There are no Geographic Restrictions’ will check the box and select all areas within the United States and its territories for the XML. Clicking in the second box, ‘Some Geographic Restrictions apply’ will check the box and expand the multi-select tree menu below. You can uncheck either box to withhold any geographic restriction information at that level, which will cause no change in the XML.

Exhibit 5-18 shows the unchecked preliminary statements for ‘Geographic Area Restrictions’ across all ‘Restrictions/Limitations’ screen in the Product Label document.

## Product Level Use Restrictions/Limitations

### Geographic Area(s)

- There are no Geographic Restrictions at this level.**  
*This applies to the entire United States and its territories.*
- Some Geographic Restrictions apply.**  
*Select to add any Level Geographic Restrictions.*

**Exhibit 5-18: Preliminary statements for ‘Geographic Area Restrictions’**

Exhibit 5-19 shows the first preliminary statement for ‘Geographic Area Restrictions’ as checked, applying this to the entire United States.

## Product Level Use Restrictions/Limitations

### Geographic Area(s)

- There are no Geographic Restrictions at this level.**  
*This applies to the entire United States and its territories.*
- Some Geographic Restrictions apply.**  
*Select to add any Level Geographic Restrictions.*

**Exhibit 5-19: First preliminary statement is checked and applies to the entire United States**

When ‘Some Geographic Restrictions apply’ is checked a multi-select tree menu for ‘Geographic Restrictions’ is generated below the preliminary statements. When the menu initially generates all states and territories default to the left, ‘Geographic Areas Allowed’ container. All counties for each state/territory are nested within the respective state/territory. All areas in the left, ‘Geographic Areas Allowed’ container are included in the Use Index XML.

Exhibit 5-20 shows the second, ‘Some Geographic Restrictions apply’ preliminary statement for ‘Geographic Area Restrictions’ checked and the new data element opened below.

Product Level Use Restrictions/Limitations

Geographic Area(s)

There are no Geographic Restrictions at this level.  
*This applies to the entire United States and its territories.*

**Some Geographic Restrictions apply.**  
*Select to add any Level Geographic Restrictions.*

**Geographic Restrictions**  
All areas are "allowed" by default.

Move areas between allowed/disallowed containers by checking their respective checkboxes and clicking the appropriate arrow button.

**Geographic Areas Allowed**

- United States
- States
  - Alabama
  - Alaska
  - Arizona
  - Arkansas
  - California
  - Colorado
  - Connecticut
  - Delaware

>

<

**Geographic Areas Disallowed**

**Exhibit 5-20: ‘Some Geographic Restrictions apply’ preliminary statement checked and new data element below**

Counties for each state/territory are nested within the respective state/territory. Clicking the right-facing arrow next to the respective state/territory will expand a list of counties for that state/territory. Clicking a down-facing arrow for the respective state/territory will collapse that list of counties/states/territories. Checking a box at any level other than the county level, such as United States, state, or territory level, will select all areas that are located within that United States/state/territory level to be moved; e.g. checking ‘Alabama’ within the list will select all counties within the state of Alabama to be moved between containers.

Exhibit 5-21 shows the expanded list of counties for the state of California.

**Geographic Restrictions**  
All areas are "allowed" by default.

Move areas between allowed/disallowed containers by checking their respective checkboxes and clicking the appropriate arrow button.

**Geographic Areas Allowed**

- United States
- States
  - California
    - California, Alameda County
    - California, Alpine County
    - California, Amador County
    - California, Butte County
    - California, Calaveras County
    - California, Colusa County
    - California, Contra Costa County
    - California, Del Norte County
    - California, El Dorado County
    - California, Fresno County
    - California, Glenn County
    - California, Humboldt County
    - California, Imperial County
    - California, Inyo County
    - California, Kern County
    - California, Kings County

>

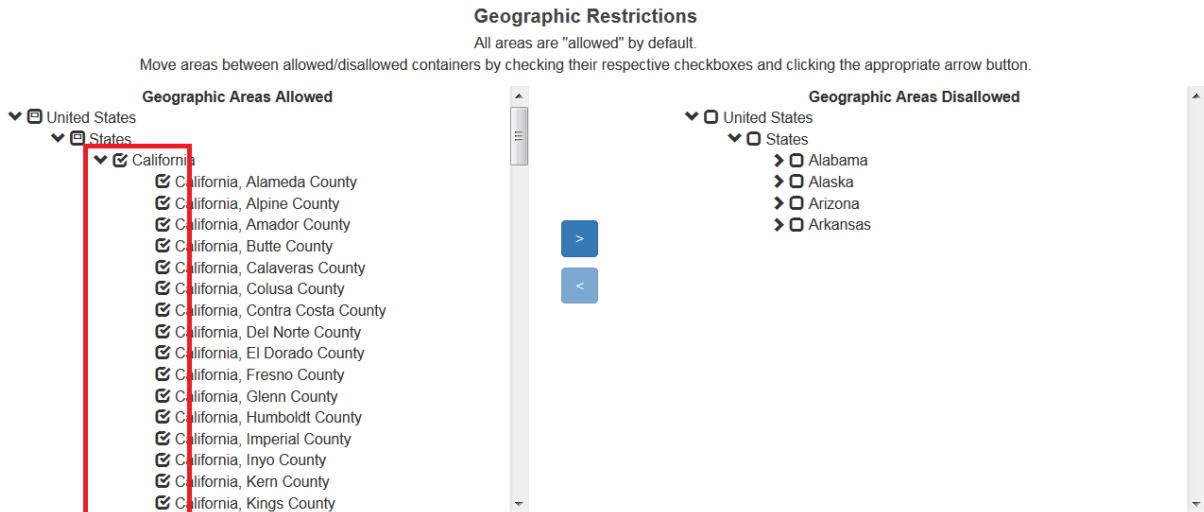
<

**Geographic Areas Disallowed**

- United States
- States
  - Alabama
  - Alaska
  - Arizona
  - Arkansas

**Exhibit 5-21: Expanded list of California counties**

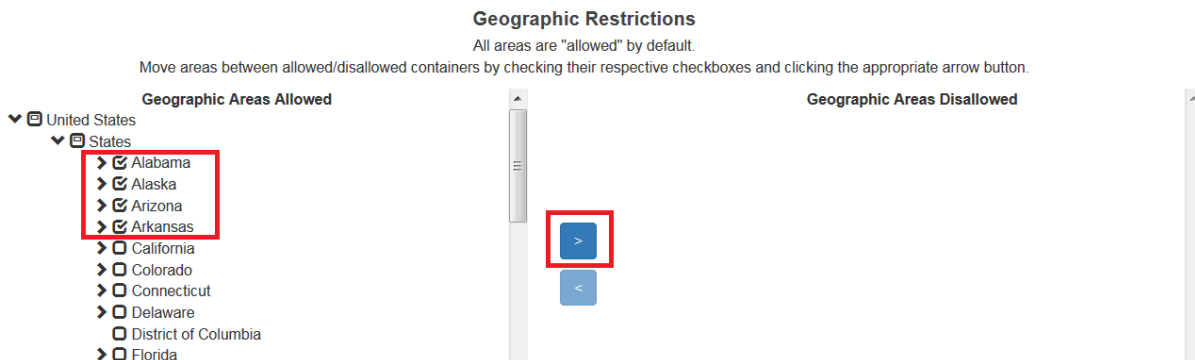
Exhibit 5-22 shows checking the state of California marks all counties in California to be moved.



**Exhibit 5-22: Checking a state marks all counties within that state to be moved**

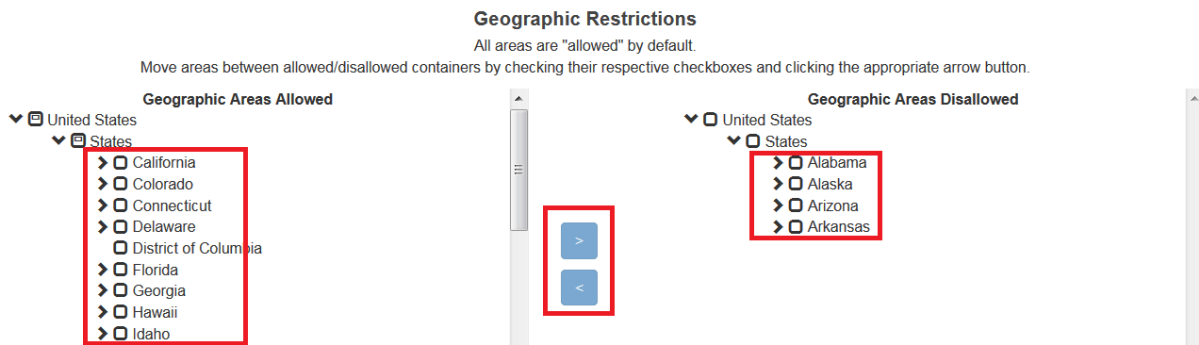
To move areas between the left, ‘Geographic Areas Allowed’ container and the right, ‘Geographic Areas Disallowed’ container check the box next to the area you wish to move. Checking the box for any area within a container will activate the respective left-facing or right-facing arrow button between the two containers. Both buttons remain inactive until an area is selected from the respective container; e.g. checking Colorado from the right, ‘Geographic Areas Disallowed’ container will activate the left-facing arrow. After you are done selecting all areas you wish to move from a container, click the respective arrow button. This will move all selected areas for that container to the opposite container. Following the moving of the selected areas between containers, all checkboxes in both containers will become unchecked to prevent unintentionally moving areas you do not wish to move. Both arrow buttons will then become inactive again until another box is checked from either container.

Exhibit 5-23 shows checking any geographic area as activating the respective button to move that area between containers.



**Exhibit 5-23: Checking Geographic Areas**

Exhibit 5-24 shows moving areas between containers unchecks all areas between both containers and deactivates the movement buttons.



**Exhibit 5-24: Moving Geographic Areas between containers**

All areas in the left, ‘Geographic Areas Allowed’ container are included in the Use Index XML. All areas added to the right, ‘Geographic Areas Disallowed’ container are NOT included in the Use Index XML. If you do not want to provide a response for ‘Geographic Area Restrictions,’ uncheck your response from the preliminary statements for the ‘Geographic Area(s)’ data element.

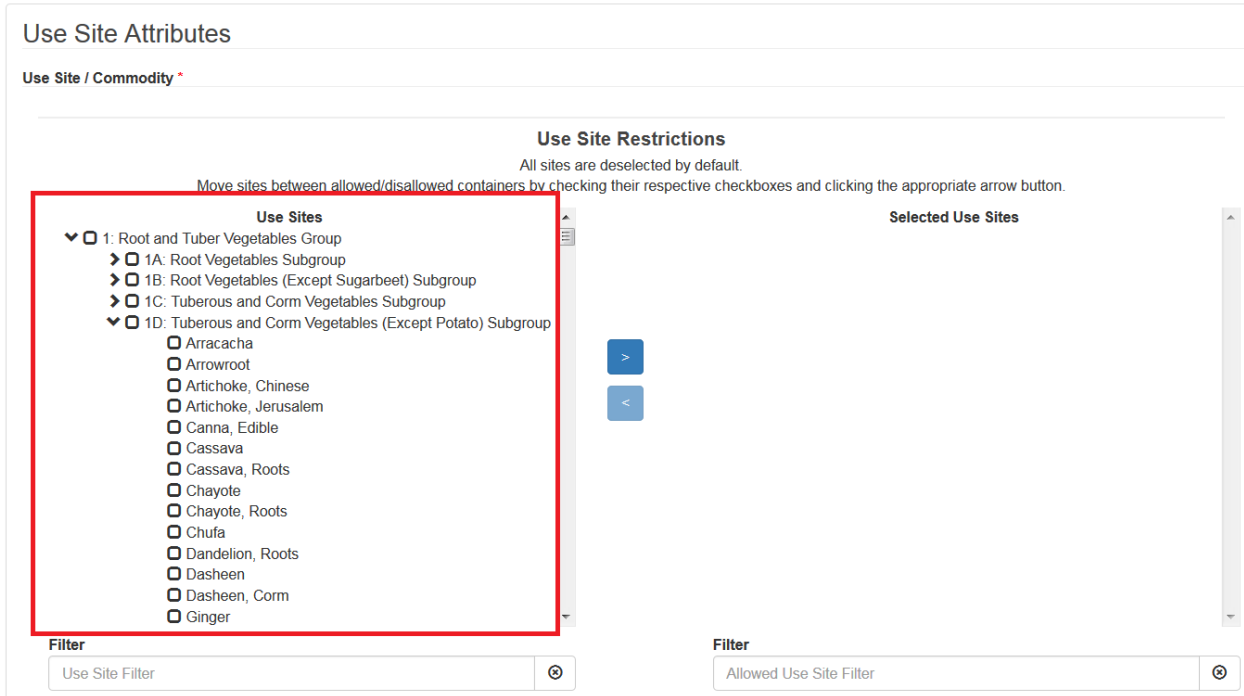
### 5.5.2 Use Sites

The process of selecting and moving Geographic Areas to and from containers is the same for Use Sites on the ‘Use Site Application Instructions’ and ‘Use Site Commodity’ screens. However, the Use Site multi-select tree menu is not hidden behind preliminary statements.

It is important to note that Use Sites within the left, ‘Use Sites’ container are NOT included in either document XML file. And Use Sites added to the right, ‘Selected Use Sites’ container are included in both the Product Label and Use Index XML files since the inputs here are shared between the two document types. If you do not want to provide a response for Use Sites, you must move all Use Sites to the left, ‘Use Sites’ container.

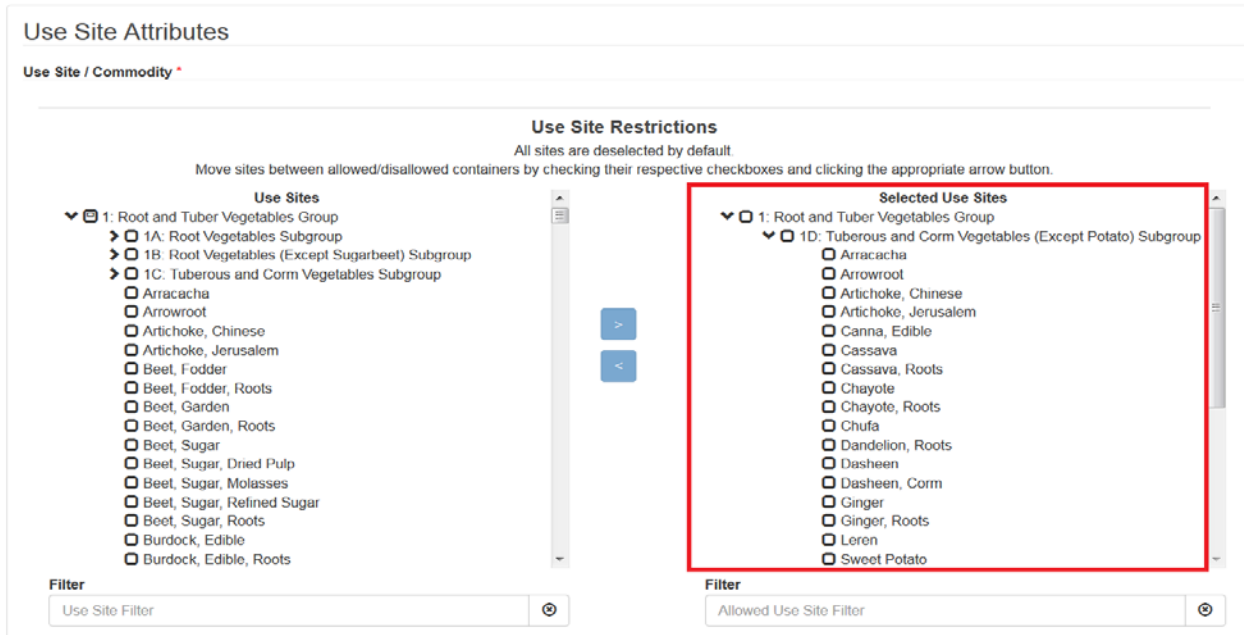


Exhibit 5-25 shows all ‘Use Sites’ on the ‘Use Site Attributes’ screen as defaulting to the left container where they will not be added to either document XML file.



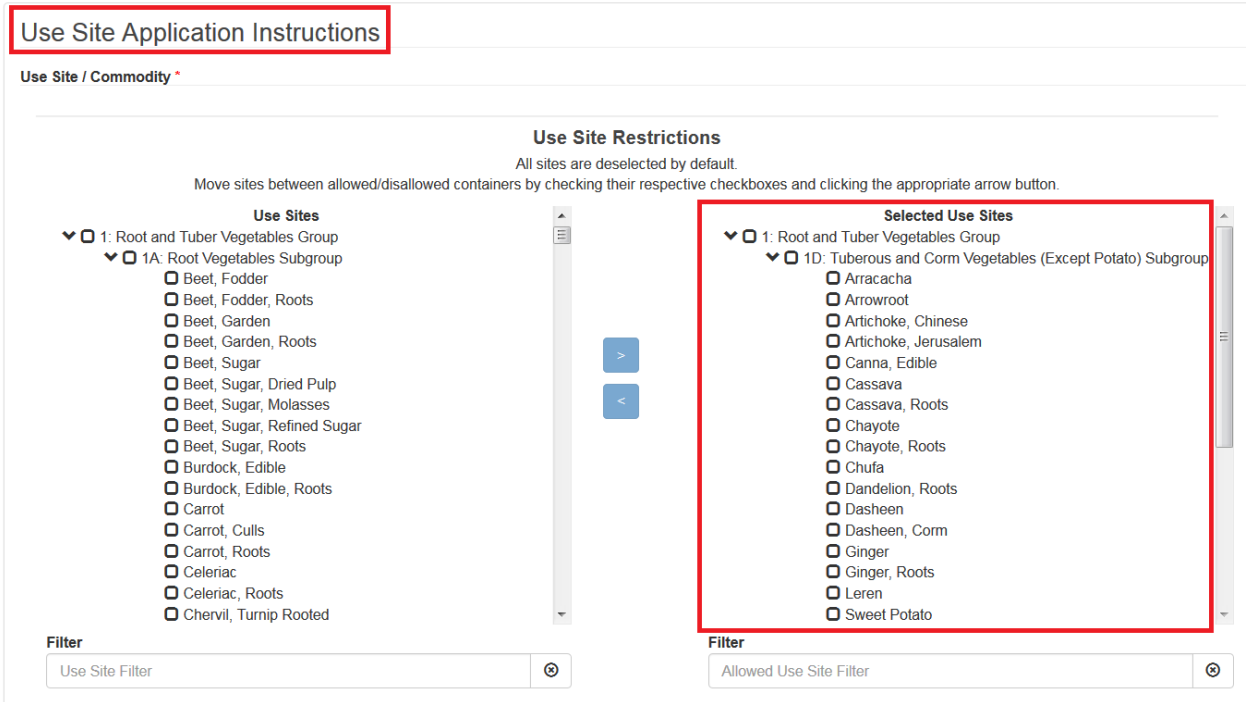
**Exhibit 5-25: All ‘Use Sites’ defaulted to the left container**

Exhibit 5-26 shows some ‘Use Sites’ moved to the right ‘Selected Use Sites’ container where they will be added to both document XML files.



**Exhibit 5-26: Use Sites in the ‘Selected Use Sites’ container**

Exhibit 5-27 shows information added to the associated, ‘Use Site Attributes’ screen when the Use Index document is also added to the sister, ‘Use Site Application Instructions’ screen in the Product Label document.



**Exhibit 5-27: Information shared between two screens in opposite documents**

## 5.6 Combination Data Entry Fields

Some data elements across both documents require a combination of data entry methods. Where combinations of methods are used it is advised that you enter all information as completely as possible as some data entries rely on the relating information to produce a valid document XML. There are variety of ways combination data entries are displayed in the SmartLabel application. However, all combination data entries use conventional methods to input information to the respective document.

Exhibit 5-28 shows an example of a multi-select menu with secondary multi-select menu combination.

**Exhibit 5-28: 'Action(s) Against Pest' on the 'Use Site Application Instructions' screen**

Exhibit 5-29 shows an example of a multi-select menu with optional text field.

**Exhibit 5-29: 'Certification(s) and Seal(s)' on the 'Marketing/Advertising Claims' screen**

Exhibit 5-30 shows an example of a multi-select menu with required text field.

**Exhibit 5-30: 'Pre-Slaughter Interval Restrictions' on the 'Restrictions/Limitations' screens**

Exhibit 5-31 shows an example of a multi-select menu with required text field and single-select menu.

**Pre-Harvest Interval Restrictions**

Click to add Pre-Harvest Interval(s). ▾

Dry hay ×

**Time** Time

**Units** Units ▾

**Exhibit 5-31: ‘Pre-Harvest Interval Restrictions’ on the ‘Restrictions/Limitations’ screens**

Exhibit 5-32 shows an example of a text field with single-select menu.

**Mass Product per Miscellaneous Application**

**Mass** Mass

**Per Quantity** Quantity

**Units** Standard Weight/Mass ▾

**Units** Miscellaneous Application ▾

**Exhibit 5-32: ‘Mass Product per Miscellaneous Application’ on the ‘Product Identification’ screen**



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## Appendix A - Definitions, Acronyms, and Abbreviations

Acronym	Full Name
CDX	Central Data Exchange
EPA	Environmental Protection Agency
IT	Information Technology
OPP	Office of Pesticide Programs
PDF	Portable Document Format
PSP	Pesticide Submission Portal
XML	Extensible Markup Language

## Appendix B – Registration Number

### **Admin Number Information**

The EPA Registration Number (Admin Number) is required on all pesticide products. The purpose of an Identification Number is to provide a unique product number for regular registrations, distributor registrations, Special Local Needs registrations, and Experimental Use Permits.

The EPA Registration Number indicates which company holds the registration for the pesticide product, and in which sequence the product was submitted to EPA by the company.

Refer to Exhibit 15-1 below for examples of Admin Numbers. Please note the following:

- CompanyNum = Company Number
- xxSEQxx = Sequence
- Seq = Sequence
- ParentRegNum means = Parent Regulatory Number
- EUP = Experimental Use Permit
- IN = Inert Ingredient Request
- PA = Pre-Application

Regulatory Action	Format	Examples
Product Registration – Section 3	CompanyNum-xxSEQxx	<ul style="list-style-type: none"> <li>• 55050-1</li> <li>• 334-165</li> <li>• 334-ANA (Temporary File Symbol before the product is registered, see Exhibit 15-2)</li> </ul>
Distributor Product	ParentRegNum-CompanyNum	<ul style="list-style-type: none"> <li>• 2155-40-12319</li> <li>• 3862-140-13103</li> </ul>
Experimental Use Permit - Section 5	CompanyNum-EUP-xxSEQxx	<ul style="list-style-type: none"> <li>• 44544-EUP-2</li> <li>• 45054-EUP-1</li> </ul>
Tolerance Petition	ParentRegNum-CompanyNum	<ul style="list-style-type: none"> <li>• 3F1383</li> <li>• 2G1214</li> <li>• Possible 2<sup>nd</sup> characters: E,F,G,H,T - based on the Tolerance Petition type</li> </ul>
Inert Ingredient Request	As given below 2nd character being E,F,G,H,T based on the tolerance petition type	<ul style="list-style-type: none"> <li>• IN-10606</li> <li>• IN-10559</li> </ul>
Pre-Application	CompanyNumPASeq	<ul style="list-style-type: none"> <li>• 2382PA1</li> <li>• 54022PA16</li> </ul>

<b>R</b>	<b>E</b>	<b>G</b>	<b>U</b>	<b>L</b>	<b>A</b>	<b>T</b>	<b>I</b>	<b>O</b>	<b>N</b>
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>0</b>