CERS Business User Guide

This guide has been developed by the California Environmental Reporting System Business User Group in cooperation with CAL/EPA to assist businesses using CERS.

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1. Getting Started

I. Create an Account

First time users, please visit CERS home page @ http://cers.calepa.ca.gov/

a. Select “Business Portal Sign In”

b. Watch Demo Video before proceeding to create a New Account.

c. Then select “Create New Account”
d. Fill out CERS Registration and select “Create My Account”
   i. Make sure the username and password meet the requirements in the red box.

   ii. You should receive an automated email message to activate your account. If you do not receive one, check your spam or junk folder. Make sure to follow the instructions on this email to activate your account.
II. Add a Facility

Once the account is activated, users can sign in and add a new facility by selecting “Add Facility” or request access to an existing CERS Business by selecting “Search”

a. If a facility exists, select “Search”
   i. When a new user requests access to a facility, it will need a Lead User or Regulator to approve or authorize access. The Regulating Agency may request verification prior to access for Lead Users. Allow some time delay for this process.
   ii. Businesses with facilities in more than one CUPA jurisdiction will be handled by Cal/EPA in accordance with their current practices of requiring written requests and validation from the business. Note: organization letters will soon become obsolete.

b. To add a new facility, click “Add Facility” and follow these steps:
   i. Provide a Facility Address
   ii. Provide the Facility Name
   iii. Select “Continue” after the facility has been added to CERS
   iv. Under the Facility Information section, answer all questions in the Business Activities worksheet and click “Save”. This questionnaire will help determine which submittal elements are required for your facility.
   v. Next, fill out the Business Owner/Operator Identification form and click “Save”. Do not submit your Facility Information until you have completed the remaining submittal elements required for your facility. CERS requires that the Facility Information section be submitted with any other submittal element(s) (i.e., it must be submitted each time another section in CERS is updated and re-submitted).
Business Activities questionnaire:

- Check Yes or No for each question based on your facility’s activities. (12 questions total...)

Business Owner/Operator Identification:
III. Entering Chemical Inventory

Check with your local CUPA or regulating agency to see what types and quantities of hazardous material are required for reporting. Your facility may be in a jurisdiction that requires reporting hazardous materials below the state thresholds. Also, if your facility generates any hazardous waste (including medical waste), you will enter these waste streams in this section (make sure you check “Waste” in the Hazardous Material Type field). To begin adding inventory records, select “Start” next to the Hazardous Materials Inventory section (see below).

a. If your facility has many different hazardous materials, you may upload your inventory from an Excel spreadsheet by selecting “Upload Inventory”.

![Facility Name: Hazardous Material Inventory](Image)

**Facility Name: Hazardous Material Inventory**

- **Inventory Actions**
  - Upload Inventory
  - Download Inventory
  - Search Facility's Inventory

- **Inventory Reports**
  - CERS Chemical Library
  - Small Business Sample Inventories

**Hazardous Materials Inventory (0) ● Draft Feb. 24, 2012**

Add Material  ●  Done

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i. Be sure to use the **CERS Hazardous Material Inventory Upload Template** to enter your data – this will avoid many unnecessary errors. You can download the template here: [http://cers.calepa.ca.gov/Tempdocs/Seeding/InventorySeedTemplateNov2011.xls](http://cers.calepa.ca.gov/Tempdocs/Seeding/InventorySeedTemplateNov2011.xls)

ii. The file size limit is 500 inventory items that can be uploaded at one time. You can choose 2 options from the dropdown menu: “Replace Existing Inventory” (deletes current inventory and replaces it with the uploaded list) or “Append to Existing Inventory” (adds uploaded list to your current inventory records).

iii. If your inventory exceeds these limits, you need to break up the data into separate excel files of about 200 chemicals each, then use the “Append to Existing Inventory” option on the upload page to run the various uploads.

iv. Of course all of the files need to include the column headings or the upload will be rejected.

Note that not all Users will have the capability of uploading their inventory. Refer to point “b” below to manually enter your information.

b. If a facility only has a few hazardous materials, it is recommended to add them manually by selecting “Add Material” in the Hazardous Materials Inventory submittal section. Simply use the CERS Chemical Library to search for the material and select “Add” when the material is found. This will auto-fill many of the inventory fields for you.
i. If the material is not found in the CERS Chemical Library, select “Unable to Find Material/Add New Chemical” to manually add your material to your inventory.

ii. There is no difference in the upload process for materials that are or are not found in the CERS Chemical Library. CERS will not reject inventory submittals solely based on inconsistencies with data in the CERS Chemical Library.

c. To check the validity of your inventory data, click “Validate My Inventory” at the bottom of the Hazardous Materials Inventory window (see below).

i. Note any guidance icons [️ = Required; ⚠️ = Warning; ⚩️ = Advisory] that appear next to inventory line items (e.g., Motor Oil & Nitrogen in the screenshot above). If you have a larger inventory spanning several pages, you may check the box “Only show materials with errors/warnings” to view just the flagged items (see below).

ii. To reconcile any errors, click the green “Edit” button next to the inventory item you wish to make revisions to. At the top of the next page, you will see the guidance icon(s) along with a brief summary of why the data has been flagged. Specific field(s) in the chemical profile that require further review will be highlighted in red (see below).
iii. In the example above, the profile for “Motor Oil” is flagged because it is missing information about its storage container (the “Inventory Storage Information” box is highlighted in red). To correct this error, check the corresponding box for the type of container your motor oil is stored in and click “Save.”
iv. Once the appropriate fields are corrected and you click “Save,” the guidance icon will disappear from your inventory list. In the example above, “Steel Drum” was selected as the container for “Motor Oil” and the updated inventory lists now only flags “Nitrogen”:

![Image showing updated inventory list]

IV. **Uploading Additional Inventory Documents**

a. **Site Map:** Oftentimes a site map is required for facilities that handle and/or store hazardous materials on site. Consult your local regulator for specific requirements on creating a site map. This file must be saved as a PDF in order to be uploaded in CERS.

i. Under the Hazardous Materials Inventory section, click either “**Site Map (Official Use Only)**”, “**Document Needed**”, or the “**New**” button on the Site Map line – all will bring you to the same screen for uploading your site map. The following window will automatically have “Upload Document(s)” selected in the Document Options box.

![Image showing site map upload process]

No more warning next to motor oil
ii. Next, click the “Choose File” button to select the appropriate site map PDF. You may change the file name or add a description for this document if you wish. When you are done, click “Save & Finish.”

b. Miscellaneous State-Required Documents: Use this option to upload any additional documents necessary for hazardous materials reporting that was not addressed in your inventory list or site map. Some examples of possible additional documents include:

i. In California, Proposition 65 requires businesses to report any quantity of listed carcinogens and reproductive toxins (to learn more or view the Prop 65 list, visit [http://www.oehha.ca.gov/prop65.html](http://www.oehha.ca.gov/prop65.html)). This report may be uploaded under “Miscellaneous State-Required Documents” in your Hazardous Materials Inventory submittal.

ii. Another common document that CUPAs may request in your hazardous materials reporting is a Medical Waste Management Plan (MWMP). If your business generates medical waste, you need to enter that waste information in the Hazardous Material Inventory (refer to Section III of this guide). In addition, you may need to upload a MWMP that describes how your business processes or disposes of their medical waste, and/or a Limited Quantity Hauling Exemption (LQHE) for the transportation of waste to accumulation areas or disposal facilities. These additional documents would be uploaded here via “Miscellaneous State-Required Documents” in the Hazardous Materials Inventory section.
c. Emergency Response and Training Plans: As with the site map, emergency response and employee training plans are generally required any facility that handles or stores hazardous materials or generates hazardous waste. You may check with your local regulator for exceptions or special instructions on meeting these requirements.

i. Select “Start” under the Emergency Response and Training Plans section to upload the corresponding files.

ii. On the next screen, you’ll see “Document Options” on the left-hand side with six different ways you can submit a document. Choose one of the following:

1) Upload Document(s): Click “Choose File” and select the appropriate plans from your computer to upload. You may choose to edit the document title or add a description. Click “Save & Finish” when you are done.

2) Public Internet URL: If your ER Plans/Training files are maintained online in a public domain (i.e., non-password protected), enter the web address in which the links to these documents may be accessed. Click “Save”. Note: check with your local regulator to ensure this is a viable option for your CUPA.
3) **Provided in other Submittal Element**: If you’ve already uploaded your ER/Training Plans into CERS, indicate which section they were included in and add any relevant comments, such as the date they were submitted, in the box below. Click “Save”.

4) **Provided to Regulator**: If you previously submitted the files to your regulator and they were approved, indicate the date they were submitted in the box below and click “Save”.

5) **Stored at Facility**: If the files were previously approved by your local regulator, you may use this option and indicate in which facility these documents are stored. Then click “Save”.

6) **Exempt**: If you feel your facility is exempt from submitting these documents, enter a short explanation of why in the box below and click “Save”.
V. Underground Storage Tanks

a. If facility has Underground Storage Tanks, select “Start” and answer the questions. Select “Save” when finished.
   i. A facility cannot make a UST submittal without entering a valid (8-digit beginning with 44) Board of Equalization (BOE) number. This number is required for any facility containing petroleum products in a UST.
   ii. Cal/EPA designated the “dummy” number, 44000000, for any facility that has USTs containing only non-petroleum products. Eventually, CERS will be modified so that facilities containing non-petroleum USTs only will not be able to enter a BOE number.
   iii. If you do not have BOE number and require one, call the BOE at (916) 322-9669 or write them at: State Board of Equalization Fuel Industry Section, MIC:30 P.O. Box 942879, Sacramento, CA 94279-0030.

2. Managing Business Organizations

- Organizations allow a set of users to manage multiple facilities owned/operated by a single business. Organizations typically are corporations or other legal entities with multiple facilities.
- Each facility belongs to only one organization.
- Every CERS business user must be associated with at least one organization.
I. **User Accounts**

a. If you are an existing user and cannot login, select “Forgot your username” and enter the registered email. If you have the correct username, you can select “Forgot your password”. You should then receive an email on how to reset your password.

b. Be sure to keep your username, password, and security question somewhere safe in case it slips your mind.

c. To change your account information (i.e., username, first & last name, email address, security question and answer, password and password protection phrase):
   
   (i) Click on “[Your Name]’s Account” at the top of the CERS Business Home page.

   (ii) Click on “Edit My Profile” (for username, name, email, security question or phrase) or “Edit My Password” (for password only)

   (iii) Update desired fields and click “Save”
II.  My Business

Go to “My Business” located at the top right corner of the webpage and select one of the options you wish to manage.

a.  Manage People
A single user can belong to multiple Organizations (e.g., consultants). A user’s security rights apply to ALL facilities associated within an Organization. The four levels of security rights are as follows:

- Viewer: View facility information (read only)
- Editor: View/edit facility information (no submit)
- Approver: View/edit/submit facility information
- Lead User: View/edit/submit facility information plus manage the Organization’s users.
i. Select an existing user to edit
ii. Select “Add Person” to add someone to your Business. Enter their email and select “Continue”. Then enter their full name, phone number and title if possible. Be sure to check a role under “Permission Group” for this person and select “Save” when finished.
iii. Select “Delete” to delete an existing user
iv. As a consultant, you can be added as a user to as many business organizations as necessary but CERS cannot create an organization for you as your facilities are not owned by your firm. As their consultant, they would add you (or they could request us to add you when they first create their organization) as a user with Editor, Approver, or Lead User permissions, depending on their needs and your services.

b. Manage Facilities

*Note: The following actions require authorization by your local regulator and may take several days for the regulator to approve your request. Including additional comments explaining the reason for your facility transfer/merge/removal request will help speed up the review process.

i. Facility Transfer
   You can request your regulator to approve transferring one of your facilities to a different business organization. This is normally used to help businesses aggregate all of their reporting facilities under a single CERS business, typically because of changes in ownership or duplicate business records.
   a) This allows you to place facilities into your organization that are currently not associated with your business. For example, there are many facility files that were migrated over from CERS1 (and Unidocs before that) to CERS2 (current version of CERS). These were all migrated as is, so they were assumed by CERS1 to be a business with only one facility. You could now transfer the files that are not currently in your business organization to the correct organization.

ii. Merge Facilities
   You can request your regulator to approve merging duplicate facilities’ records for your business if reporting/submittals have already been performed on one or both facilities. Facilities can only be merged into another facility for the same business/organization.

iii. Delete Facilities
   You may request that your regulator delete a facility if you have never reported on this facility. Facilities with submissions would normally be merged into another facility. Contact your facility's local regulator if you have an unusual situation that can't be handled using the Transfer, Merge, or Delete options described on this page.

iv. Archived Facilities
   View any facilities previously reported in CERS by your business but which are now owned/operated by some other business. This would normally be facilities transferred out of your business at your request or by your regulator due to an owner/operator change for the facility.
c. Add New Business
   i. To add a new Business organization, click “Select Business” from the “My Business” drop-down menu.
   ii. In the next window, click the “Add a new facility/business” button.

d. Change Business Name
   i. To change the name of your business organization, click on “My Business” (not any of the dropdown items). This should bring you to the Business Summary page – if it does not, click “Summary” on the left side of the window.
   
   ![Business Summary Page]

   ii. Under the General Information section, click the “Edit” button next to the business name. The following window should pop up:

   ![Edit Business Name/Headquarters]

   iii. Enter the new business/organization name (and headquarters location, if applicable), then click “Save”.

e. Change Facility Name
   i. To change the name of your facility, go to the CERS Home page and click on the “Start/Edit Submittal” button next to the facility of interest.
ii. Under the Facility Information section, click on “Business Activities”. In the upper right side of the Business Activities page, click the “Edit” button.

![Business Activities section of CERS Business](image)

iii. Under the Site Identification heading, click the “Edit” button next to Facility Name.

![Site Identification section of CERS Business](image)

iv. The following window will pop up. Enter a new facility name and click “Done”.

![Edit Facility Name window](image)
3. Helpful Tips

I. Getting Help

a. The CERS Business website is an interactive online managing tool. Users often need to correspond with certain requirements in order to proceed. Make sure to check emails and notifications and complete the required tasks.

b. Two very useful tools are at the bottom of the website:
   - Request Technical Assistance: cers@calepa.ca.gov
   - Local regulator(s): https://cersbusiness.calepa.ca.gov/Tools/Regulators

c. Check the CERS Business User Group (CBUG) webpage hosted by the Industrial Environmental Association (http://iea-sd.com/cbug/) for additional resources including essential links, important updates, CERS flowchart & user guide, CBUG presentation & meeting notes, and a place to leave feedback or ask questions.
II. **Tools**

a. Be sure to check out “Tools” at the top of the page for help.

b. Be sure to contact your local CUPA first to answer questions or resolve problems. If they cannot help, they can forward your question/problem via email to the CERS Help Center.

III. **Reports**

a. Clicking on “Reports” in the upper right-hand header allows you to search regulator listings, as well as download your submitted facility data as Excel files.

b. If you select **Unified Program Local Reporting Requirements Listing**, you may search by keyword or regulating agency to see if your local CUPA requires additional documents to be submitted that are not included in CERS.

c. By clicking on either “Download Submitted Inventories for All My Facilities” or “Download Facility Information for All My Facilities” you can view all your submitted facility data at once in an Excel file. This is useful for ensuring all pertinent fields are correctly completed, match consistency through multiple facilities, or simply to keep a copy of your CERS business information for your own records.
IV. **“Home” page**  
   a. If user has two or more business organizations, select **“User’s Account”** on the top right corner to view all business organizations. These users would typically be consultants with multiple clients.  
   b. When inside a business organization, selecting **“Home”** will take you to the facility within that business organization.

![CERS Business](image.png)

V. **Web Browsers**  
CERS is designed for standard-sized screens using relatively current web browsing software (e.g., Internet Explorer 8+, FireFox 3.6+, current versions of Google Chrome or Safari). Some CERS features may not work on older browsers, and CERS is not designed to be effectively used on smaller display devices (e.g., mobile phones, etc.).

VI. **Printing**  
   a. Viewing and printing some CERS reports requires relatively current PDF viewing software (Adobe Reader 8+).  
   b. Click on printing icon 🖼 on the left side for CERS Printing tips if needed.  
   c. To print inventory files and other submitted forms, go to the page that you want to print, Select **“File”** on left top corner and select **“Print”**. Before printing, it’s helpful to select **“Print Preview”** to see what you will get when you print. If the page does not show correctly the way you want it to be printed, select **“Page Setup”** under **“File”** and check the setting that is compatible with your browser and printer.
VII. Data Recovery

How to recover data overwritten by CUPA data seeding – this only applies when a user has already entered data into CERS but not yet submitted (aka draft data), and their CUPA has seeded data into CERS from their local database.

a. There is a document recovery feature in the Tools section of the CERS Business Portal. Click on “Tools” in the upper right heading.

b. In the Tools menu, click on “Search Your Draft Submittals Replaced by Regulator Seeding”.

c. Note that submittals rejected by your CUPA, or documents you’ve uploaded but did not submit, may be lost permanently. It is highly recommended to keep back up copies of all submittal documents for your own records.
4. CERS Conditions of Use

✓ I agree to **protect my CERS Account password and not share it with others.** If my account is compromised, I will contact CERS Technical Assistance: cers@calepa.ca.gov immediately.

✓ I understand when I am using the training version of CERS that any data is not permanently retained or backed up, and CANNOT be moved into the production version of CERS.

✓ I understand any data in the training version of CERS is publicly available (to facilitate learning opportunities for myself and other CERS users), so I should not enter sensitive facility data into the training version of CERS.

✓ I will only upload documents as required by CERS or my local regulator(s). Any document I upload will be as compact as possible, will not exceed 25MB is size, and will be free from viruses or other malicious elements.

✓ I understand I should **NOT** use my web browser's "Back" button while using CERS—doing so may result in duplicate records or other problems.

✓ I understand that CERS is designed for standard-sized screens using relatively current web browsing software (e.g., Internet Explorer 8+, FireFox 3.6+, current versions of Google Chrome or Safari). Some CERS features may not work on older browsers, and CERS is not designed to be effectively used on smaller display devices (e.g., mobile phones, etc.).

✓ I understand viewing and printing some CERS reports requires relatively current PDF viewing software (Adobe Reader 8+).

✓ I understand CERS is generally available 24 hours a day except 1) the last Thursday of the month from 2-3pm, 2) occasional Saturday mornings, 3) other planned times noticed in advance on the CERS home page.

✓ **Facility**- “Unified program facility” means all contiguous land and structures, other appurtenances, and improvements on the land that are subject to the requirements listed in subdivision (c) of section 25404 of the Assembly Bill No. 2286.

✓ **Organization**-The “Organization” entity is a new CERS concept allowing businesses and/or regulators to manage a group of one or more users (CERS-Keys) to administer a collection of one or more facilities. Organization is roughly synonymous with the term “Business” although Organizations can also be government agencies, non-profit organizations, and other entities that own/operate regulated facilities.

✓ **Chemical Location** (inventory field 201) - Building or outside/adjacent area where hazardous material is handled. A chemical that is stored at the same pressure and temperature, in multiple locations within a building, may be reported on a single page. NOTE: This information is not subject to public disclosure pursuant to HSC 25506.

✓ CERS/Unified Program Reporting Policies & Guidelines (for businesses and regulators) available here: [http://cers.calepa.ca.gov/policy](http://cers.calepa.ca.gov/policy)