Merging Duplicate Facilities

Newsletter Article Updated: March 2022

Question: A new manager unknowingly created a new CERS ID and made a submittal for an existing facility in CERS. CERS now has 2 CERS IDs for the same site. Can the two CERS IDs be merged to eliminate the 'duplicate' CERS ID created and not lose the submittal history made?

Answer: A business should not create a new CERS ID unless one has not already assigned to that location. **The Merge Facility feature in CERS can be used to eliminate duplicate CERS ID for the same location within the same business/organization.** Regulators will first need to use the Facility Transfer function so that both facilities are in the same business/organization then merge facility records. The duplicate facility records will be merged into the target facility records and all its submittals will be transferred to the target facility. After the merge, the duplicate facility records will be deleted from CERS as part of the merge process – **this action is irreversible.**

10179983	Test Facility	existing CERS ID	1234 Main Ave	Sacramento	95838	CAL123456789	8/27/2021
10182611	Test Facility	duplicate CERS ID	1234 Main Ave	Sacramento	95838		2/18/2022

Organization 1 (Duplicate Facility Record)

General Information

Organization Name
CalEPA Test Business Organization
[Edit]

Business Lead Regulator
Sacramento County Environmental Management Department

Facility/User Counts
1 / 1

Headquarters
Sacramento, CA

Multi-Jurisdictional? (MJB)
No

Organization Code
90036460

Origin
Business (Organization was established by a Business User in the Business Portal.)

Last Submittal (Any facility/element)
02/18/2022

People

	First Name	Last Name	Email	Title	Account Status
Select	Tara	Van	tara.van@calepa.ca.gov	Admin	Username: Taravan2 Permissions: Lead Users Last Sign-in: 2/21/2022 7:34 AM

Show All People ▾   All Roles ▾   Export To Exce

Facilities

	Facility Name	Street Address	City	ZIP Code	LastSubmittal
10182611	Test Facility duplicate CERS ID	1234 Main Ave	Sacramento	95838	02/18/2022

Organization 2 (Target Facility)

General Information

Organization Name
CalEPA Test Business Organization
[Edit]

Business Lead Regulator
Sacramento County Environmental Management Department

Facility/User Counts
2 / 4

Headquarters
Sacramento, CA

Multi-Jurisdictional? (MJB)
No

Organization Code
90016663

Origin
CUPA (Established by a CUPA Lead User in the Regulator Portal.)

**Last Submittal (Any facility/element)**
10/05/2021

People

	First Name	Last Name	Email	Title	Account Status
Select	Jessie	Perez	jperez@calepa.ca.gov		Username: jperez Permissions: Lead Users Last Sign-in: 2/9/2022 1:22 PM
Select	Tara	Van	tara.van@calepa.ca.gov		Username: Taravan2 Permissions: Lead Users Last Sign-in: 2/21/2022 7:34 AM
Select	Neeraj	Seelam	neeraj.seelam@calepa.ca.gov		Username: neerajseelam Permissions: Lead Users Last Sign-in: 2/18/2022 1:20 PM
Select	Siva	Musam	siva.musam@calepa.ca.gov		Username: No Account Permissions: Lead Users Last Sign-in: Never

Show All People ▾   All Roles ▾   Export To Excel

Facilities

	Facility Name	Street Address	City	ZIP Code	LastSubmittal
10179983	Test Facility existing CERS ID	1234 Main Ave	Sacramento	95838	08/27/2021
10181738	FTT Facility Transfer Test	1001 I St	Sacramento	95814	10/05/2021

Facility Transfer
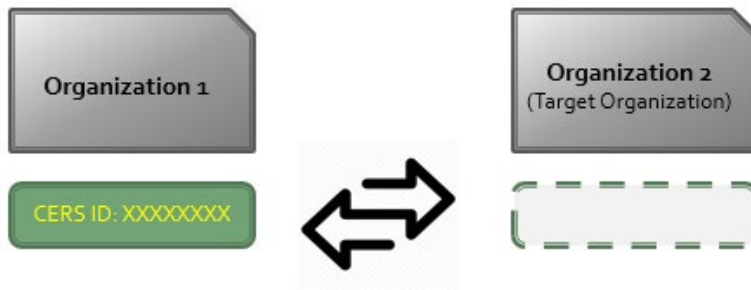
1. Open your web browser and navigate to the **CERS Central** Home page: https://cers.calepa.ca.gov
2. Select the (blue) "**Regulator Portal Sign In**" button.
3. Sign in to the **CERS Regulator portal** by entering your CERS Regulator account **username** and **password**.
4. Prior to performing the transfer, review the **Business/Organization** current **Submittal History**.
   - At the menu bar, select the **Businesses** button, input the **Business Name (Organization 2)** and click the blue **Search** button.
   - Click the blue **Select** button next to the **Business** name.
   - At the **Business Summary** page, click the **Submittal** link on the left. **Please note** there are 4 separate submittals in this example.

5. Search for the duplicate facility in question for transfer.
   - At the **Business Submittals** page, select **Facilities** link on the left menu bar.
   - Select the blue CERS ID in question.
   - Review the **Submittal History.** In the particular example; the **Submittal History** also shows this facility has 1 submitted submittal and none in the **Archived Submittal History**. Any pending draft submittals will not be reflected here, only in the Business portal.

6. At the left menu bar, select **Manage Facility** link, then select the **Transfer Facility to Another Business** link.

7. At the **Facility Transfer** page, input **Organization Name (Organization 2) & Headquarters** then click the blue **Search CERS Organizations** button.

8. Once the **Business/Organization** is found, select the blue **Select** button next to the **Business/Organization Name**. This business organization has 2 facilities.

9. At the **Confirm Facility Transfer** page:
   - Use the drop-down arrow to select **Regulator Approving Facility Transfer**.
   - Provide a reason why the facility is being transferred into the provided **Comments** box.
   - **IF** there are past submittals or any current draft. A checkbox will appear for selection to **Transfer Past Submittals (and any current drafts) to New Business/Organization (Organization 2).** System will indicate the number of past submittals next to it.
   - **IF** it is determined that submittal history do not need to be transferred to the new facility, leave this box unchecked.

   For this example, check the checkbox to **Transfer Past Submittals (and any current drafts) to New Business/Organization.** By checking this checkbox, all current submittals in the **Submittals History** will be transferred to the new business organization **Submittals History** section. If leave unchecked, the submittals will just transfer to the **Archived Submittal History** section.

10. Select the blue **Done** button at the **Facility Transfer Confirmation** page.
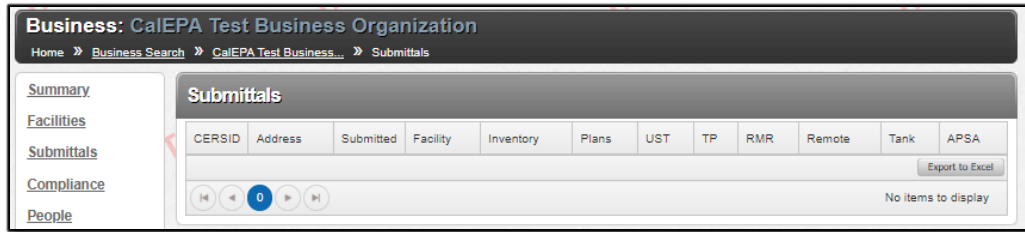

11. Review to ensure **DUPLICATE** facility **(10182611)** is no longer listed here in the **DUPLICATE** business organization **(Organization 1)**.
    - At the **CERS** Main page, menu bar on top, select the **Businesses** button, input the **Business Name**, select the blue **Search** button.
        - If it was the last facility of the business, change the **Status to Inactive** instead of leaving the default value of **Active**.
    - Click the blue **Select** button next to the **Business Name**.
    - At the **Business Summary** page, select the **Facilities** link on the left menu bar for facilities listing.
    - At the Facilities page, review to ensure the facility **(10182611)** was transferred out successfully.
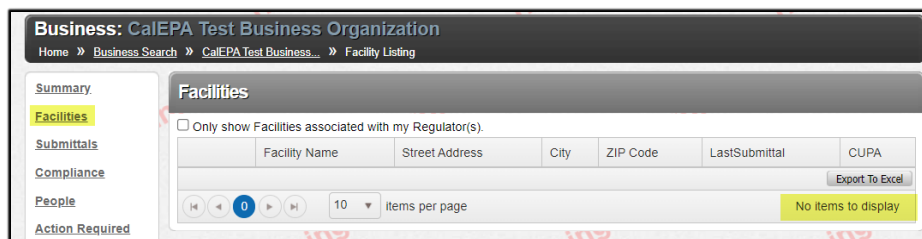

12. Review the **DUPLICATE** business organization (**Organization 1)** to ensure the facility submittals were also successfully transferred out.
    - At the **Facility Listing** page, click the **Submittals** link on the left menu bar.
    - **Submittals** page, review to ensure **DUPLICATE facility (10182611)** submittals no longer listed under **DUPLICATE business organization** (**Organization 1), Submittals** page.

13. Review the **Organization 2 (90016663) Submittals** page to ensure submittals for duplicate facility **(10182611)** were successfully transferred over since the checkbox was checked.
    - At the main page, select the **Businesses** button at the top menu bar.
    - Input the **Business Name** and click the **Search** button.
    - Click the blue **Select** button next to the **Business Name.**
    - The newly transferred facility should be listed under the **Facilities** section.
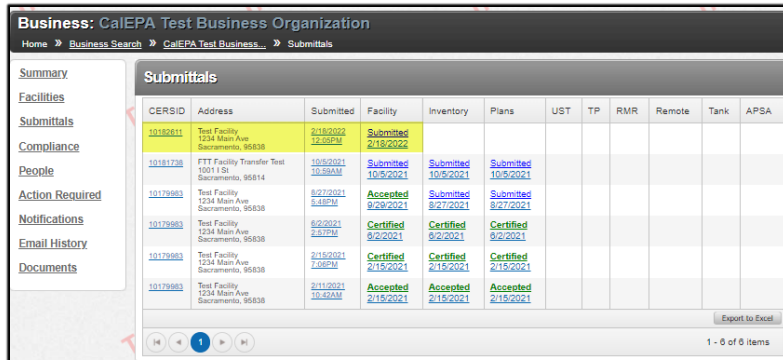
14. Review the newly transferred facility's submittals:
    - Under the **Facilities** section, select the blue **CERS ID** of the newly transferred facility.
    - At the left menu bar, select the **Submittals** link to review facility submittals.
    - Since the checkbox was **checked**, the **Facility Summary/Submittal History** page will show 1 submittal in the **Submittal History** section, but not in the **Archived Submittal History**.
    - The submittal will be accessible by the business user.

Now that both facilities are under the same organization, the duplicate facility (10182611) can now be merged with target facility (10178983) and not lose the submittal history made.
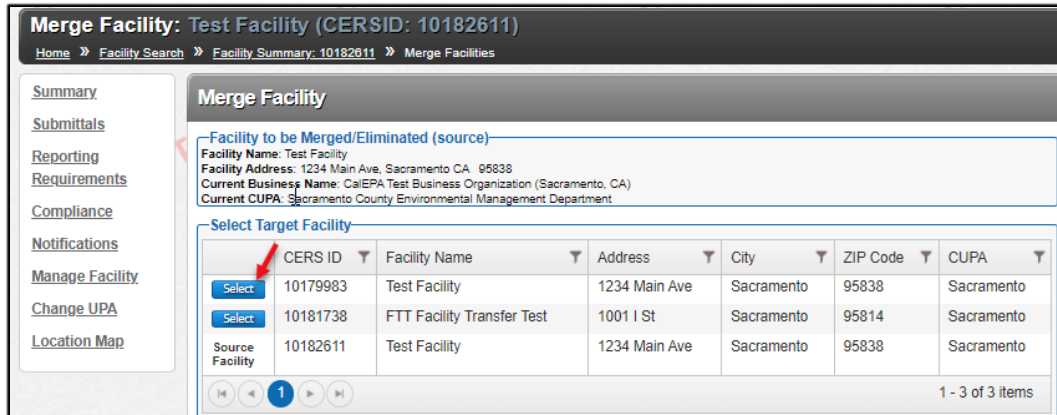
Merge Facility
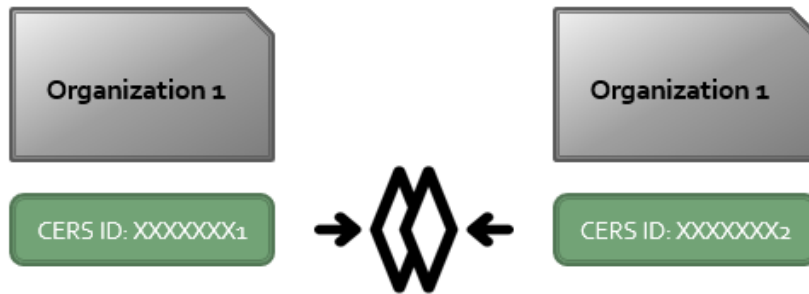
Facility records must belong to the same Business/Organization before they can be merged. The duplicate facility that is being merged into the target facility will be deleted in CERS and all its submittals will be transferred to the target facility – this action is irreversible.

1. At the **Home** page, select the **Business** button at the top menu bar. Search for Business/Organization. In this example, we will be using:
   - **Business/Organization** - CalEPA Test Business Organization (90016663)
   - Merge **FROM (Duplicate Facility)** - Test Facility (10182611)
   - Merge **TO** (**Target Facility**) – Test Facility (10179983)

2. At the **Business Summary** page, **Facilities** section, click on the CERS ID to be merged, **Test Facility (10182611)**.
   - Left menu bar, select **Manage Facility** link.
   - Select **Merge Facility into Another Facility of this Business** link.

Regulator Portal users should visit CERS Central or contact CERS Technical Support (cers@calepa.ca.gov) for assistance

3. At the **Merge Facility** page, Source Facility (10182611) is to be merged/eliminated.
    - In the **Select Target Facility** section, select the blue **Select** button next to the CERS ID target facility (merge to).

4. At the **Confirm Facility Merge page,** select the **Regulator**, input a **Comment** for the facility merge, and select the blue **Confirm** button.
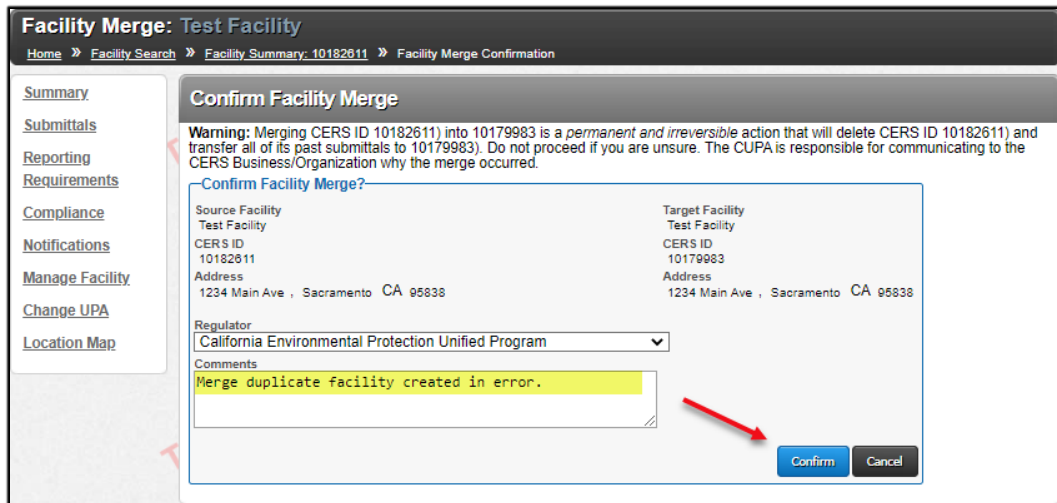
5. At the **Facility Merge Confirmation** page, select the blue **Done** button to complete the facility merge.
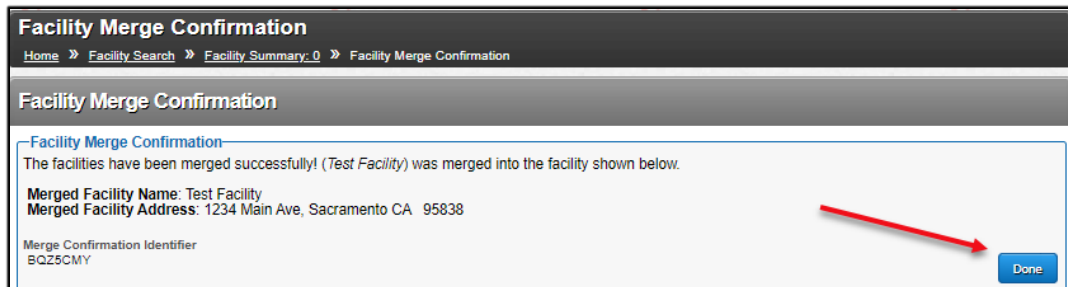
6. **CalEPA Test Business Organization (Organization 2)** no longer has the duplicate facility, CERS ID 10182611. Submittal History has been merged successfully and assumed the identity of CERS ID 10179983.

Regulator Portal users should visit CERS Central or contact CERS Technical Support (cers@calepa.ca.gov) for assistance