

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
 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 Excel

Facilities

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

Organization 2 (Target Facility)

General Information

Organization Name: CalEPA Test Business Organization
 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

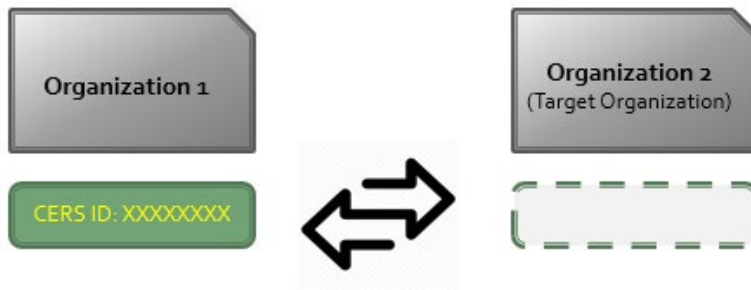
	First Name	Last Name	Email	Title	Account Status
Select	Jessie	Perez	jperez@calepa.ca.gov		Username: jperez Permissions: Lead Users Last Sign-in: 2/9/2022 1:22 PM
Select	Tara	Van	tara.van@calepa.ca.gov		Username: Taravan2 Permissions: Lead Users Last Sign-in: 2/21/2022 7:34 AM
Select	Neeraj	Seelam	neeraj.seelam@calepa.ca.gov		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	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.

CERSID	Address	Submitted	Facility	Inventory	Plans	UST	TP	RMR	Remote	Tank	APSA
10179983	Test Facility 1234 Main Ave Sacramento, 95838	8/27/2021 5:48PM	Accepted 9/29/2021	Submitted 8/27/2021	Submitted 8/27/2021						
10179983	Test Facility 1234 Main Ave Sacramento, 95838	6/2/2021 2:57PM	Certified 6/2/2021	Certified 6/2/2021	Certified 6/2/2021						
10179983	Test Facility 1234 Main Ave Sacramento, 95838	2/15/2021 7:08PM	Certified 2/15/2021	Certified 2/15/2021	Certified 2/15/2021						
10179983	Test Facility 1234 Main Ave Sacramento, 95838	2/11/2021 10:42AM	Accepted 2/15/2021	Accepted 2/15/2021	Accepted 2/15/2021						

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.

Facility: Test Facility (CERSID: 10182611)
 Home » Facility Search » Facility Summary_10182611 » Submittal History

Summary
 Submittals
 Reporting Requirements
 Compliance
 Notifications
 Manage Facility
 Change UPA
 Location Map

Submittal History for Test Facility
 *Note: Submittal data is current as of 2/21/2022 at 12:00 AM.

CERSID	Address	Submitted	Facility	Inventory	Plans	UST	TP	RMR	Remote	Tank	APSA
10182611	Test Facility 1234 Main Ave Sacramento, 95838	2/19/2022 12:05PM	Submitted 2/19/2022								

1 - 1 of 1 items

Archived Submittal History for CERSID: 10182611
 Submittals shown below were submitted by previous owner/operators of this facility.

CERSID	Address	Submitted	Facility	Inventory	Plans	UST	TP	RMR	Remote	Tank	APSA
No items to display											

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

Manage Facility: Test Facility (CERSID: 10182611)
 Home » Facility Search » Facility Summary_10182611 » Manage Facility

Summary
 Submittals
 Reporting Requirements
 Compliance
 Notifications
 Manage Facility
 Change UPA
 Location Map

Manage Facility

Transfer Facility to Another Business
 Businesses can request, and regulators can approve (or perform) transferring a facility from one business to another. Facility Transfer requests from businesses typically occur when a new owner/operator of a facility claims an existing CERS ID (physical address) reported upon by a previous facility owner/operator. Facility transfers are also commonly used to consolidate a multi-facility business' facilities that were established in separate single-facility businesses (due to the CERS1 migration or other issues). Unless the regulator chooses otherwise, any submittals submitted by the previous facility owner/operator (CERS Organization) will be archived. In certain cases Cal/EPA may approve facility transfers involving many facilities for a multi-jurisdictional business.

Merge Facility into Another Facility of this Business
 This can be used to eliminate duplicate facility records for the same business and address. Facilities can only be merged into another facility for the same business/organization. Use the Facility Transfer function to move and then merge facilities between businesses. Note: The facility being merged into another will be deleted in CERS and all of its submittals transferred to the destination facility--this action is irreversible. Any draft submittal data for the merging facility will be deleted.

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

Facility Transfer: Test Facility (CERSID: 10182611)
 Home » Facility Search » Facility Summary_10182611 » Facility Transfer

Summary
 Submittals
 Reporting Requirements
 Compliance
 Notifications
 Manage Facility
 Change UPA
 Location Map

Step 1: Select New CERS Organization for this Facility

Facility to Transfer
 Facility Name: Test Facility
 Facility Address: 1234 Main Ave, Sacramento CA 95838
 Current Business Name: CalEPA Test Business Organization (Sacramento, CA)

Transfer to the Following Business/Organization
 Please enter the name of the business (NOT facility) you wish to transfer this facility into.

Organization Name: OR
 Headquarters: OR

Business/Organization Name | Headquarters | Facilities
 No items to display

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

The screenshot shows the 'Facility Transfer: Test Facility (CERSID: 10182611)' page. The main heading is 'Step 1: Select New CERS Organization for this Facility'. Below this, there are fields for 'Facility to Transfer' including Facility Name, Address, and Current Business Name. A section titled 'Transfer to the Following Business/Organization' contains input fields for Organization Name and Headquarters, with a 'Search CERS Organizations' button. Below this is a table with columns for Business/Organization Name, Headquarters, and Facilities. The first row shows 'CalEPA Test Business Organization' with 'Sacramento, CA' as the headquarters and '2' facilities. A blue 'Select' button is positioned to the left of this row. The second row shows 'Facility's Current Business' with 'Sacramento, CA' and '1' facility. A red arrow points to the 'Select' button.

Business/Organization Name	Headquarters	Facilities
CalEPA Test Business Organization	Sacramento, CA	2
Facility's Current Business	Sacramento, CA	1

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.

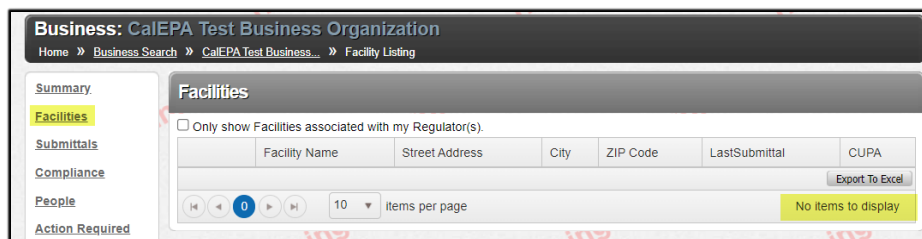
The screenshot shows the 'Confirm Facility Transfer: Test Facility' page. It displays 'Confirm Facility Transfer details' with fields for Source and Target Business/Organization, and Facility to be Transferred. A dropdown menu for 'Regulator Approving Facility Transfer' is set to 'California Environmental Protection Agency Partners'. A 'Comments' box contains the text: 'Duplicate facility created in error, transfer past submittals history box CHECKED.' Below this is a checkbox labeled 'Transfer Past Submittals (and any current drafts) to New Business/Organization: 1' which is checked. A red arrow points to this checkbox, and another red arrow points to the 'Confirm' button at the bottom right.

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



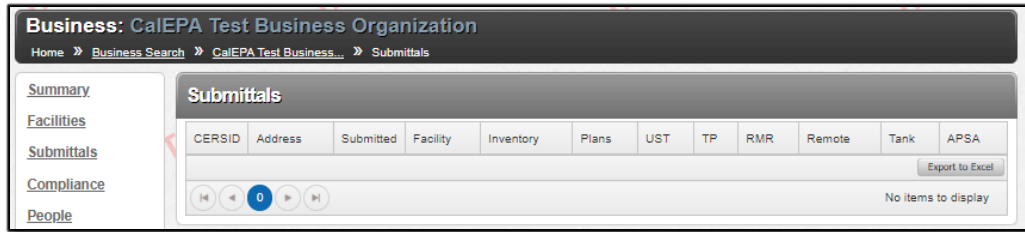
11. Review to ensure **DUPLICATE** facility (**10182611**) is no longer listed here in the **DUPLICATE** business organization (**Organization 1**).

- 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.



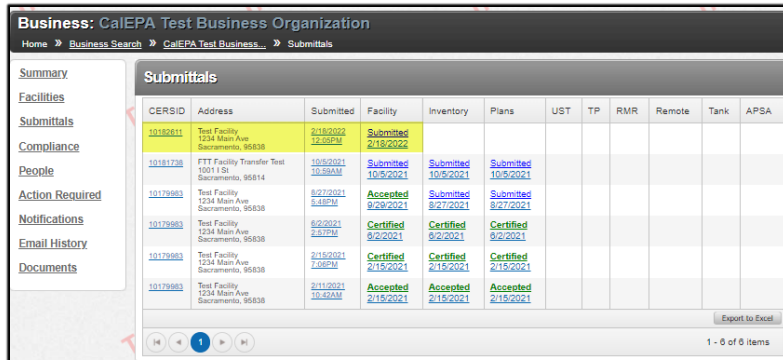
12. Review the **DUPLICATE** business organization (**Organization 1**) to ensure the facility submittals were also successfully transferred out.

- 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.

Facility: Test Facility (CERSID: 10182611)
 Home » Facility Search » Facility Summary: 10182611 » Submittal History

Submittal History for Test Facility

*Note: Submittal data is current as of 2/22/2022 at 12:00 AM.

CERSID	Address	Submitted	Facility	Inventory	Plans	UST	TP	RMR	Remote	Tank	APSA
10182611	Test Facility 1234 Main Ave Sacramento, 95838	2/18/2022 12:05PM	Submitted 2/18/2022								

1 - 1 of 1 items

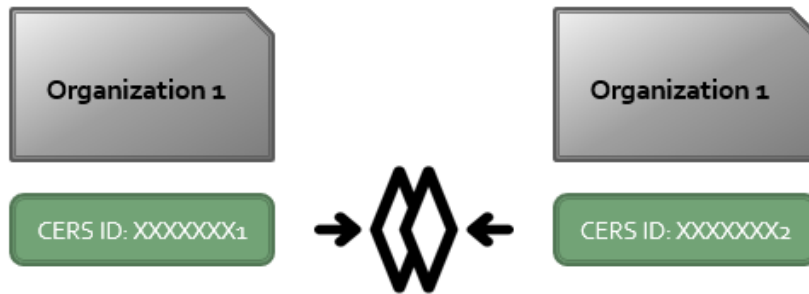
Archived Submittal History for CERSID: 10182611

Submittals shown below were submitted by previous owner/operators of this facility.

CERSID	Address	Submitted	Facility	Inventory	Plans	UST	TP	RMR	Remote	Tank	APSA
No items to display											

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



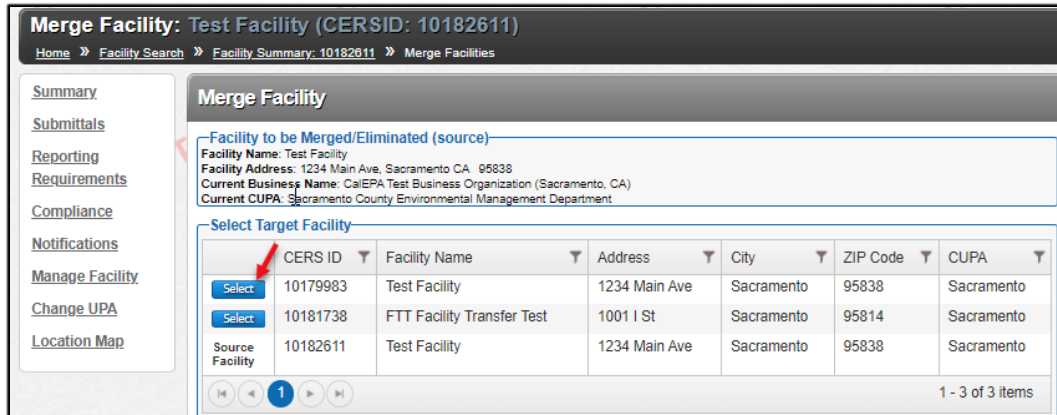
Facility records must belong to the same Business/Organization before they can be merged. The duplicate facility that is being merged into the target facility will be deleted in CERS and all its submittals will be transferred to the target facility – this action is irreversible.

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)

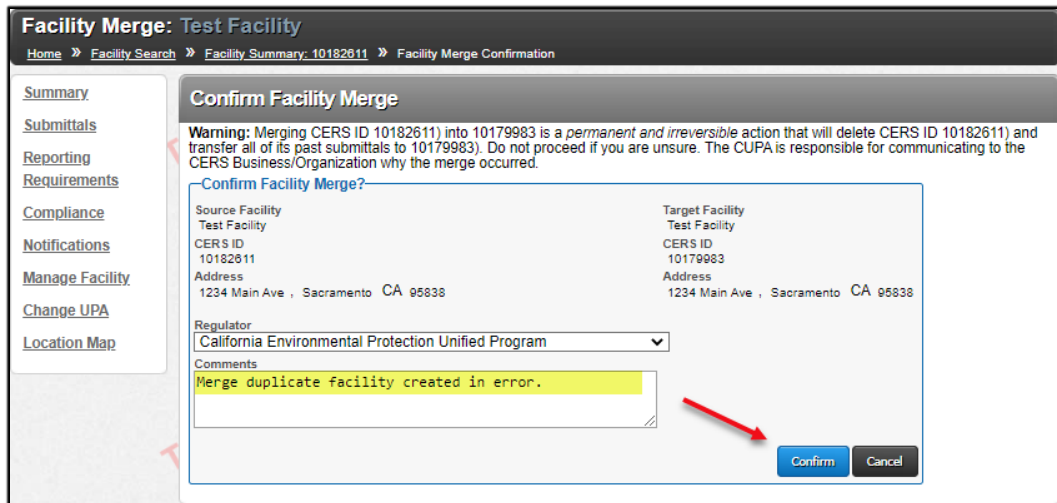
	Facility Name	Street Address	City	ZIP Code	LastSubmittal
10179983	Test Facility	1234 Main Ave	Sacramento	95838	08/27/2021
10181738	FTT Facility Transfer Test	1001 I St	Sacramento	95814	10/05/2021
10182611	Test Facility duplicate	1234 Main Ave	Sacramento	95838	02/18/2022

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.

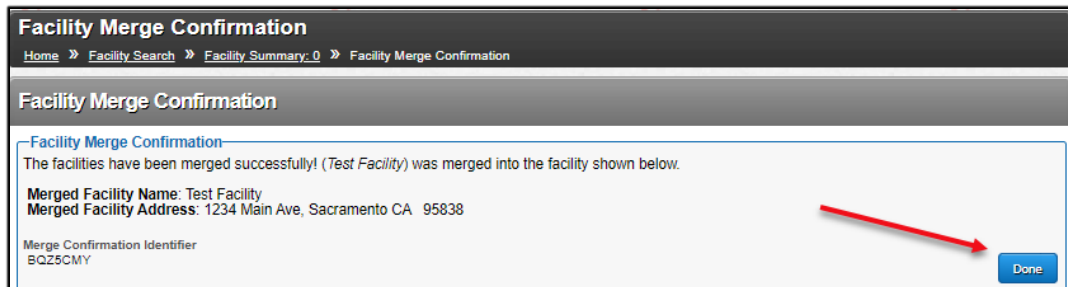
- At the **Merge Facility** page, Source Facility (10182611) is to be merged/eliminated.
 - In the **Select Target Facility** section, select the blue **Select** button next to the CERS ID target facility (merge to).



- At the **Confirm Facility Merge** page, select the **Regulator**, input a **Comment** for the facility merge, and select the blue **Confirm** button.



- 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.

Facility: Test Facility (CERSID: 10179983)
 Home » Facility Search » Facility Summary: 10179983 » Submittal History

Submittal History for Test Facility

*Note: Submittal data is current as of 2/23/2022 at 12:00 AM.

merged submittal

CERSID	Address	Submitted	Facility	Inventory	Plans	UST	TP	RMR	Remote	Tank	APSA
10179983	Test Facility 1234 Main Ave Sacramento, 95838	2/18/2022 12:05PM	Submitted 2/18/2022								
10179983	Test Facility 1234 Main Ave Sacramento, 95838	8/27/2021 5:48PM	Accepted 9/29/2021	Submitted 8/27/2021	Submitted 8/27/2021						
10179983	Test Facility 1234 Main Ave Sacramento, 95838	6/2/2021 2:57PM	Certified 6/2/2021	Certified 6/2/2021	Certified 6/2/2021						
10179983	Test Facility 1234 Main Ave Sacramento, 95838	2/15/2021 7:08PM	Certified 2/15/2021	Certified 2/15/2021	Certified 2/15/2021						
10179983	Test Facility 1234 Main Ave Sacramento, 95838	2/11/2021 10:42AM	Accepted 2/15/2021	Accepted 2/15/2021	Accepted 2/15/2021						

1 - 5 of 5 items

Archived Submittal History for CERSID: 10179983

Submittals shown below were submitted by previous owner/operators of this facility.

CERSID	Address	Submitted	Facility	Inventory	Plans	UST	TP	RMR	Remote	Tank	APSA
No items to display											