

## How to Create a New Organization (with no facilities added) in CERS

The process outlined below details how a CERS Regulator user\* can create a new Organization (business) in the California Environmental Reporting System (CERS) with no facilities – to transfer an existing facility to.

**\*Please Note: Lead User permissions to a CUPA/regulatory agency in the CERS Regulator portal are *required* in order to create new organization with no facilities.**

1. Open your web browser and navigate to the **CERS Central** Home page:  
<https://cers.calepa.ca.gov>
2. Select the (green) “**Business Portal Sign In**” button.
3. Sign in to the CERS Business portal by entering your **CERS Regulator** account **username and password**.
4. After signing in to the **CERS Business** portal, select the “**Tools**” link. (*Located in the upper-right corner of each page.*)
5. At the bottom of the **Tools** page, select the “**Create CERS Business/Organization (no facility added)**” link. (*As shown in the screenshot below.*)

California Environmental Reporting System: Business

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Tools Home » CERS Tools

**Please Note: Regulator Lead User permissions are required to be able to view/select this link, as an option on the Tools page, in the CERS Business portal.**

**This section is only available/visible to regulator lead users**

**Create CERS Business/Organization (no facility added)**

Lead regulator users can use this tool to create a CERS Business without creating a new facility like you would in the Add Facility wizard. This tool would typically be used to create a "target" organization to transfer an existing CERS Facility to.

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6. On the following page, titled “**Create CERS Business/Organization**”, below the “**New Business Details**” section:
  - Enter the **Organization Name**. *(The business name, corresponding to the facility that is to be transferred to this new/target organization.)*
  - Enter the Organization’s **Headquarters (City/State)**.
  - **Origin** drop-down menu should remain on the default selection of “**CUPA**”.
  - **Select CUPA/regulatory agency** from the **My Regulator** drop-down menu.
  - When all form fields have been completed, select the **Save** button to create the new organization.
  - **The CERS Regulator user that created the new organization will be added as a Lead User to the organization** and redirected to the **Business Summary** page.
7. **(In a separate window or tab...)** Return to the **CERS Central Home** page: <https://cers.calepa.ca.gov> and select the (blue) “**Regulator Portal Sign In**” button.
8. **Sign in to the CERS Regulator portal** by entering your CERS Regulator account username and password.
9. After signing in to the CERS Regulator portal, select the **Facilities** button from the menu bar. *(Located at the top of each page.)*
10. From the **Facility Search** page, enter the **CERS ID** number of the facility that is to be transferred (to the newly created organization) and select the “**Search**” button.
11. Once the **Facility Search** results have been populated, select the (blue) **CERS ID** button (from the left-most column) next to the facility that is to be transferred.
12. The **Facility Summary** page will be displayed. Select the “**Manage Facility**” link *(from the sub-menu, located on the left-hand side of the page)*.
13. From the **Manage Facility** page, select the “**Transfer Facility to Another Business**” link.
14. From the **Facility Transfer** page, you will see: “**Step 1: Select New CERS Organization for this Facility**”. Enter the name of the newly created organization (with no facilities) into the **Organization Name** field, then select the “**Search CERS Organizations**” button.
15. **Locate the target business/organization (created in Step #6) in the search results**. Then click on the “**Select**” button *(from the left-most column)*, next to the Business/Organization name, to **select the target organization (to transfer to)**.

16. On the following page, titled “**Confirm Facility Transfer**”:

- Select the “**Regulator Approving Facility Transfer**” drop-down menu, then **select your CUPA/Regulatory Agency** from the listing.
- In the **Comments** box, enter a brief explanation regarding why the facility is being transferred to the new organization. **(Please Note: Entering text into the Comments section is required in order to complete the facility transfer.)**
- **Check the checkbox** (*below the Comments section*) next to “**Transfer Past Submittals (and any current drafts) to New Business/Organization**” to ensure that all Submittal History is transferred with the facility to the new organization **or leave the checkbox un-checked** if the Submittal History for the facility is not to be transferred to the new organization.
- Select the “**Confirm**” button to complete the facility transfer.

17. **Repeat Steps #9-16 if more than one facility needs to be transferred to the new business/organization.**

18. **Return to the CERS Business portal (last referenced in Step #6)** and select the “**My Business**” button from the menu bar. (*Located at the top of each page.*)

19. Select “**People**” link. (*From the sub-menu, located on the left-hand side of the page.*)

20. From the **People** page, select the “**Add Person**” button to add a business contact.

- Enter the person’s **Email Address** and **Confirm Email Address**.
- Then select **Continue**.
- Enter all known **Identification Information: First Name, Last Name, Phone Number, and Title**.
- Select **Continue**.
- From the **Summary** page, below the **Account Information** section, select the **Initiate Invite** button (if applicable).

**(Please Note: The “Initiate Invite” button will only be displayed if the email address entered is not associated with an active CERS user account.)**

- Then check ONE checkbox to select the **Permission Group** (the level of access the business contact will have to the organization and its facilities):
  - **Lead User** – Can view/add/edit/submit facility reports to regulators, as well as add, remove, and otherwise manage their business’ user accounts, facilities, and other data about their CERS business/organization.

- **Approver** – Can add, view, edit, and submit facility reports to their facility's regulator(s).
  - **Editor** – Can add/edit facility submittals/reports, but cannot submit reports to their facility's regulator(s).
  - **Viewer** – Can view facility submittals/reports (read-only).
- Select the **Save/Save & Send Invitations** button to add the business contact.

21. **Repeat Steps #18-20 to add additional business contacts to the organization.**

22. **After all business contacts have been added to the new organization:**

- **Select your own name** from the **People** section.
- Select the **Delete** button and confirm – to remove your own permissions to the business/organization.
- Lastly, **sign out** of the **CERS Business** portal.

23. Return to the **CERS Regulator** portal and select the “**Businesses**” button from the menu bar. Then use the **Business/Organization Search** to locate the new organization. All People/permissions and CERS ID numbers/facilities under the organization can be confirmed by reviewing the **Business Summary** page.