



PALO ALTO FIRE DEPARTMENT
OFFICE OF THE FIRE MARSHAL

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CERS Step-by-Step Guidance

To Establish a CERS Account for Your Business:

1. Go to <https://cers.calepa.ca.gov/>
2. Select "Business Portal Sign-In"
3. Select "Create New Account"
4. Fill in the required information on the "CERS Registration" page to create your account
5. Select the "Create My Account" button in the lower right corner of the form.
6. You will receive an email from the CERS Administrator to the email address you provided during account registration. This contains instructions to complete the activation of your CERS account.
 - a. Open your email from the CERS Administrator and click on the link provided.
 - b. You will be given a message confirming your CERS Account activation.
 - c. You will also be given the option of signing into your CERS account from this screen or going back to the CERS Internet page.
7. In the future, all updates and changes to your CERS account will be made by logging into your CERS account

Important Note:

Facility: is defined as a building or buildings, structure or structures at a fixed location where hazardous materials/wastes subject to regulation under the Unified Program are used, handled or stored.

ex: single underground storage tank (UST), a single building or a campus depending on the local agency practice;

Business: is defined as an employer, self-employed individual, trust, firm, joint stock company, corporation, partnership, or association. It includes a business organized for profit and a nonprofit business. A city or a county would be included in this definition of a business.

- For a business with only one facility, the Business/Organization name and facility name would be the same.
- For a business that has more than one facility, this term may be an abbreviated business name or other name as determined by the business.

When creating an account in CERS, if you have a business with multiple facilities (or may have in the future), the account name chosen should be representative of the overlying business and not one facility.

To Subsequently Log-in to your CERS Account:

1. Go to <https://cersbusiness.calepa.ca.gov/Account/SignIn?ReturnUrl=%2f>
2. Click on “Business Portal Sign-In”
3. Enter your CERS account Username and click “Next”
4. Enter your CERS account Password and click “Next”
5. The first time you enter your CERS account, it is necessary to ‘link’ your CUPA* facility(ies) to your CERS account. You are given two options to choose from:
 1. “Request Access to an Existing CERS Business” – use if you previously entered data into CERS to find your facility or facilities and ‘link’ it or them to your CERS account
 2. “Add a New Facility”- if you don’t find facility, if your facility is new, or has never filed an HMBP
6. Subsequent sign-ins to your CERS account will go directly to your CERS Homepage. List all of the facilities connected to your account. A click on the facility choice will take you directly to the homepage for that facility.

*A **CUPA** is a Certified Unified Program Agency, which is authorized to carry out several of the various hazardous materials regulatory programs administered by the State and City.

The Homepage:

Once you've created a CERS account, every time you sign in you will be directed to your Business Homepage. As its name implies, the Homepage is a starting point. From this page, you submit information about your facilities to be in compliance.

You can access Common Tasks from the Home page:

1. “Start Facility Submittal”
2. “Add Facility”
3. “Manage People/Users”
4. “Contact Your Local Regulator(s)”
5. “Action Required”
6. “Notifications for my Business” – keeps a running record of all notifications and correspondence between the CERS Administrator, the CERS Account and the Regulator for the facilities within their jurisdictions.

Note:

Once on the homepage, click on the “People/Users” button and enter at least one additional Lead User. If for some reason one of the lead users is no longer with the business, another lead user may access the account to make the appropriate entries.

CERS screen button options:

1. *Start* — Click “New” to start a new submittal element.
2. *Edit* — Click “Edit” to edit an existing submittal screen. This view shows any deficiencies and offers either a “Save” or “Cancel” option.
3. *Review* — Click on the “Screen name” (e.g.: “Business Owner”/ “Operator Identification”) to review an existing submittal screen. Any item with a “red button” requires attention and will need to be addressed prior to submitting.

Making Facility Submittals:

Making a facility submittal is the formal process of reporting Hazardous Material Business Plan documents to the CUPA and meets legal reporting requirements. CERS allows you to submit required information as a complete package or in sections, called Submittal Elements. The CERS submittal elements may or may not apply to your facility depending on your business activities. These elements are:

1. Facility Information (Business Activities and Owner/Operator Information)
2. Hazardous Materials Inventory and Map
3. Emergency Response and Training Plans
4. Underground Storage Tanks
5. Onsite Hazardous Waste Treatment Notification
6. Recyclable Materials Report
7. Remote Waste Consolidation Annual Notification
8. Hazardous Waste Tank Closure Certification
9. Aboveground Petroleum Storage Tanks
10. California Accidental Release Program

Important Note:

The Business Activities/Facility Information submittal element: is the first section that every business needs to complete for their facility(s). The information you provide via this submittal element determines which other CERS submittal elements are applicable to the facility and what information you need to report. Based on your answers CERS will prompt you to complete one or more of these submittal elements. Because the City of Palo Alto requires **ANY** quantity of a hazardous material be reported, you will need to answer ‘**Yes**’ to the first question. The required submittal requirements will be listed on the Home Page after clicking on the “Start/ Edit Submittal” button on a facility listed. The Business Activities/Facility Information submittal is required with **ANY** other submittal. The Business Activities/Facility Information is normally not submitted by itself, unless you are only updating that element and no other.

To Begin Annual Facility Submittal:

1. Click the “Start Facility Submittal” link on the Common Task Bar of the Home Page
2. The next page lists the facilities associated with your business whether it is one or multiple. If you have multiple facilities, you can search for a specific facility. To begin a facility submittal, click the “Start/Edit Submittal” button.
3. From this page you prepare draft submittals to transmit to your local regulator(s). Make sure to review any status and guidance messages for your submittals by selecting the guidance icons. A stop sign shaped red icon alerts you if you need to review the submittal. If necessary, click on the “Review Needed” link for guidance.
4. Click the green “Start” button on the right side of the screen.
5. A “Start New Submittal” window will appear asking if you want to start your submittal from a previously submitted document or start your new submittal from scratch (if starting from scratch the new document will be blank, and you will need to fill in every field again).
6. Once an option is chosen, you will be brought to the Business Activities page. Here you can:
 - a. re-enter your data (if you choose “start from scratch”),
 - b. edit previously submitted data (if you choose to base your submittal on a previous submittal), or
 - c. submit the data if nothing has changed.
7. Click the “Save” button when you are ready to transmit the completed submittals to your local regulator(s).
8. After clicking the “Save” button, the next page will lead you to the “Business Owner/Operator Identification” page. Fill in the fields, then click “Save”. When you submit a screen, both you and the relevant local agency receive an email confirmation.

Hazardous Materials Inventory:

1. There are two parts to this submittal element:
 - a. the Hazardous Materials Inventory – page to be filled out completely
 - b. the Site Map – document to upload
2. The icons on the left and the text on the right side of the screen alert you to what is needed; red text alerts you when something needs attention.
3. You must enter a separate inventory record for each hazardous material and hazardous waste that the facility handles. Quantities are subject to Hazardous Material Business Plan (HMBP) reporting requirements.
4. Hazardous materials at your facility are to be reported separately for each building or outside *storage* area, with separate entries for unique occurrences of physical state, storage temperature and storage pressure in the completed inventory. To begin, click on the “Start” box in the Hazardous Materials Inventory category. Again, you can select “Based upon by submittal of” or “From scratch”.

Note:

For most facilities this information has been pre-loaded by your CUPA Agency. You will simply need to review the information for accuracy, make necessary changes, and submit the information.

5. If you need to add materials/chemicals that are not listed for your facility, you may click on the “Add Material” button. You will be directed to a chemical/material search screen. If you choose CERS Chemical Library as your search source, some sections are automatically filled in (e.g. Chemical Identification, Physical Properties and Chemical Hazard Classification). You need to complete the remaining sections— Inventory Location and Quantity, Inventory Storage Information, and Mixture Components. Once you complete that information, click the “Save” button.
6. One other submittal element is needed - a Site Map, also called a Facility Map. The map should depict what material and where in the facility the hazardous materials are located. It does not have to be a formal map but must be easily understood. These can be used by First Responders in an emergency.

Uploading Maps & Documents:

Some submittal elements, such as Site Maps, Emergency Response/Contingency Plan, Employee Training Plan, and Underground Storage Tank (UST) forms are uploaded into CERS rather than submitted by filling in data fields.

1. Three typical types of site maps to be uploaded are:
 - a. A general site plan that can include but is not limited to: the location of buildings, exterior storage facilities, permanent access ways, evacuation routes, parking lots, internal roads, chemical loading areas, equipment cleaning areas, storm and sanitary sewer accesses, emergency equipment and adjacent property uses.
 - b. A building floor plan that includes: hazardous materials storage areas within the building, rooms, doorways, corridors, means of egress and evacuation routes.
 - c. The Underground Storage Tank (UST) Monitoring Site Plan which indicates: the location of sumps, dispensers, sensors, underground storage tanks and other monitoring equipment.
2. Click "Upload Documents" on the Documents Options on the left side of the page.
3. Click the "Choose File" button and search for the document to be uploaded. (If the document is not available in a file already, scan and save the document to a file for uploading). If you are using the template from the CERS Website, save the completed template to a file on your computer for uploading retrieval.
4. Click the "Save & Finish" button to complete the upload.
5. Site maps and other documents including Underground Storage Tank (UST) forms such as Owner Statement of Designated UST Operator (DO) Compliance, UST Owner/Operator Written Agreement, Certification of Financial Responsibility, Consolidated Emergency Response/Contingency Plan Template, and the Monitoring Site Plan are required to be uploaded into CERS in the same manner included in the UST submittal element.

Important Note:

You must submit/upload an emergency response/contingency plan for your facility. An optional template titled the "Consolidated Emergency Response/Contingency Plan Template" is available on the screen. Click on it and complete the open fields. Then save the document to your computer for uploading. This may be used to satisfy the Hazardous Materials Business Plans (HMBP) requirement.

Managing Users:

One important task you should complete quickly is to manage your businesses' users. These are the other people in your business who need to view or manage data in CERS. Review the permission levels and recommendations for assigning them as follows:

1. Lead Users — Can add, remove, and otherwise manage the CERS Business' users and facilities. Best Practice is to assign at least two Lead Users, usually the business owner and one other.
2. Viewers – May only view facility reports (read only).
3. Editors – May add or edit facility reports but cannot submit reports to regulators. This permission might be given to a consultant.
4. Approvers – May view, edit, and submit facility reports to regulators. Since this permission level carries legal ramifications, a business owner may want to maintain this permission level.

To add a person:

1. Click the "People/Users" button on the Homepage.
2. Input the person's email address and click "Continue".
3. You will be prompted to input the person's identification information. Input the information and click "Continue".
4. If this person does not have an account, you must initiate an invitation. Check the permission(s) you want to assign to this person and click "Save & Send Invitation".
5. The person will receive an email invitation. The person must respond to the invitation within 30 days. If they do not respond, you can resend the invitation.