



California Pesticide Electronic Submission Tracking (CalPEST)

CalPEST User Guide

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1 INTRODUCTION AND OVERVIEW

Welcome to the California Pesticide Electronic Submission Tracking (CalPEST) User Guide! This comprehensive guide is designed to empower external users, like you, with the knowledge and skills needed to navigate CalPEST seamlessly. Whether you are a first-time user or a seasoned Company Administrator or Company Submitter in need of assistance with a specific topic, this guide will ensure you make the most of CalPEST's features. While we have strived to provide the most accurate and up-to-date information in this guide, the screenshots and details are subject to change. Please note that this User Guide is to provide guidance for navigating through CalPEST. It is not intended to replace regulatory guidance or requirements.

1.1 Purpose and Scope

This user guide covers various aspects of CalPEST, ensuring users can seamlessly navigate and utilize key functionalities. Below is an overview of the topics included:

- **New Account Registration:** Step-by-step instructions for registering as a new user with CalPEST.
- **User Authentication**
 - **User Sign In:** Guidance on the login process for multifactor authenticated access.
 - **Forgot Password:** Guidance on recovering a forgotten password.
- **User Profile**
 - **View Companies:** Learn how to access information about companies you are associated with (i.e., are authorized to work on behalf of).
 - **Request Association:** Understand the process of requesting an association with a company.
 - **Withdraw Association:** Guidance on withdrawing your association with a company.
- **Company Profile**
 - **Edit Company Profile:** Understand who has access to update company information and how to make changes to company addresses.
 - **Company Creation Requests:** Instructions for submitting a request to create a company within the system.
 - **Company Name Requests:** Understand how to change the name of the company within the system.
 - **See Associated Users:** Explore how to view users associated with specific companies, associate or disassociate users, and change roles for those users.
 - **Generate a Company License:** Understand how to generate and access a company license for currently registered pesticide products.

- Inactivate a Product Registration: Guidance on inactivating a pesticide product registration.
- Pending Submissions: Guidance on how to view pending submissions for a company and how to change the contact for a pending submission.
- Dashboard: Understand how to navigate the user dashboard and the information presented.
- New Submissions:
 - Product Renewals: Guidelines on renewing registered pesticide products.
 - Data Submissions: Guidance on submitting various types of data.
 - New Products: Instructions for applying for a new pesticide product registration.
 - Amendments: Information on submitting pesticide product amendments or notifications.
 - Company Changes: Guidelines for submitting company ownership changes or product transfers.

2 ACRONYMS

Acronym	Terms
CalPEST	California Pesticide Electronic Submission Tracking
CAR	Company Association Request
CRR	Company Role Request
CCR	Company Creation Request
CDR	Company Disassociation Request
CNR	Company Name Request
PIR	Product Inactivation Request
DAT	Data Submission
PRO	New Product Submission
AME	Amendment Submission

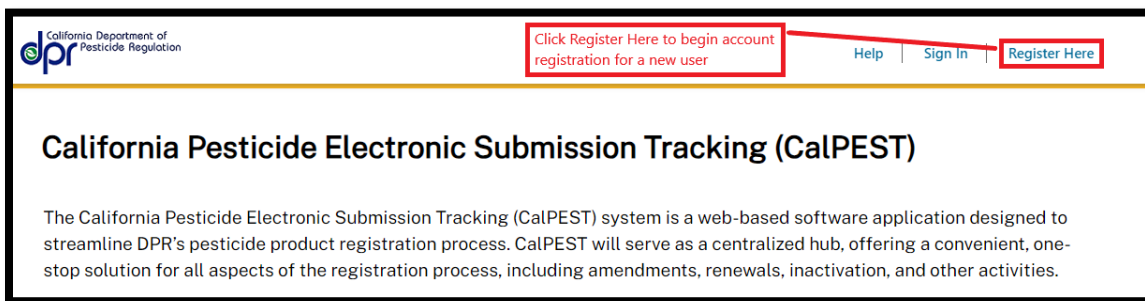
3 CALPEST PORTAL FUNCTIONALITIES

This user guide is a comprehensive resource crafted to assist external users in maximizing their experience with CalPEST. CalPEST serves as the mechanism for self-service activities.

3.1 New Account Registration

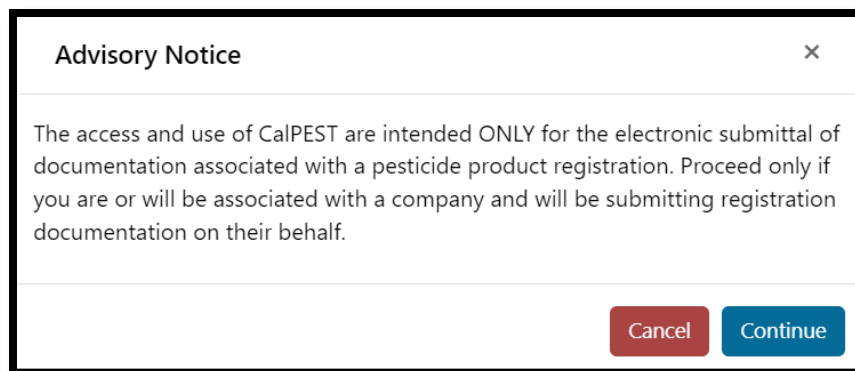
An external user can create an account through the New Account Registration process within CalPEST. This process is initiated from the CalPEST landing page by clicking the Register Here menu option.

Figure 3.1: CalPEST Landing Page



The user will be presented with an Advisory pop-up message that must be acknowledged by clicking Continue:

Figure 3.2: Advisory



A wizard provides the user with a 3-step process to complete the initial user registration process:

1. Terms and Conditions
2. Details
3. Address

3.1.1 Terms and Conditions

The user must acknowledge the Terms and Conditions statement by clicking the checkbox to enable the Continue button.

Figure 3.3: Terms and Conditions

The screenshot shows the 'Account Registration' page with three steps: 1. Terms and Conditions, 2. Details, and 3. Address. The 'Terms and Conditions' step is active. Below the step indicator, there is a note '* = Required'. The main content includes the title 'Terms and Conditions', a revision date of 'September 2024', a paragraph explaining DPR's commitment to security, a section titled 'DPR Responsibilities' with four bullet points, a section titled 'Privacy Statement and Conditions of Use' with one bullet point, a section titled 'Your Role in Security' with seven bullet points, a section titled 'Acknowledgement' with three numbered points, and a final note stating 'These terms and conditions are subject to change...'. At the bottom, there is a checkbox labeled 'I agree to CalPEST Terms and Conditions *' which is currently unchecked. A red box highlights this checkbox, and a red line points from it to another red box containing the text 'User must acknowledge Terms and Conditions to proceed'.

3.1.2 Details

The user will need to enter an email address, first name, last name, and phone number and then enter the code from the Captcha to proceed. All required fields will be marked with an asterisk (*), and validation messaging will be displayed when applicable.

Figure 3.4: Registration Details

Account Registration

1 Terms and Conditions ✓ 2 Details 3 Address

* = Required

Email *


First Name *

Last Name *

Phone *

CAPTCHA
(To generate a new image or play the audio of the code from the image, navigate below image)

Enter the code from the image


[Generate a new image](#)
[Play the audio code](#)

3.1.3 Address

The user will need to enter basic address information. All required fields will be marked with an asterisk (*), and validation messaging will be displayed when applicable. All users are required to have a US address.

Figure 3.5: Address

Account Registration

1 Terms and Conditions ✓ 2 Details ✓ 3 Address

* = Required

Street 1 *

Street 2

City *

State *

Zip Code *

Zip+4 Code

When the user clicks the Continue button and the address is sent through a USPS Verification service to obtain the most accurate address details.

Figure 3.6: USPS Verification – Use Recommended Address

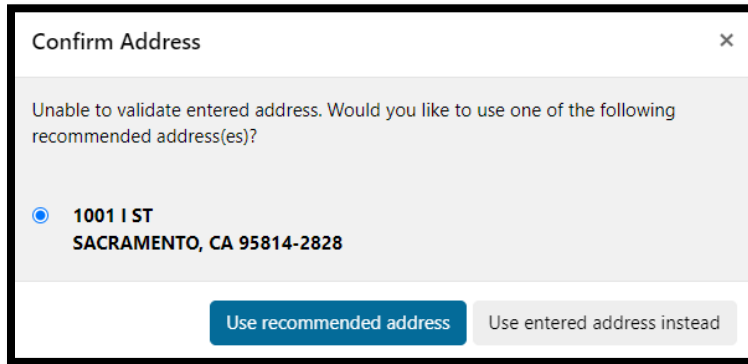
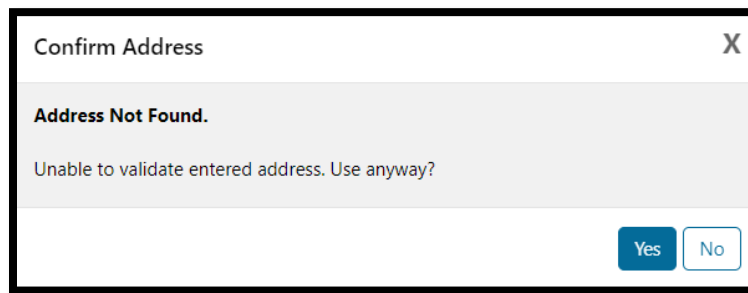
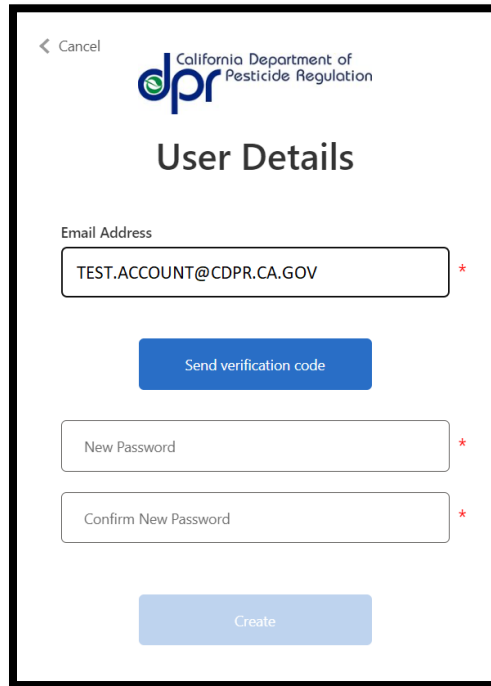


Figure 3.7: USPS Verification – No Address Match



The user will be routed to the User Details verification popup. The user will confirm an email address and click Send verification code to proceed.

Figure 3.8: User Details – Send Verification Code

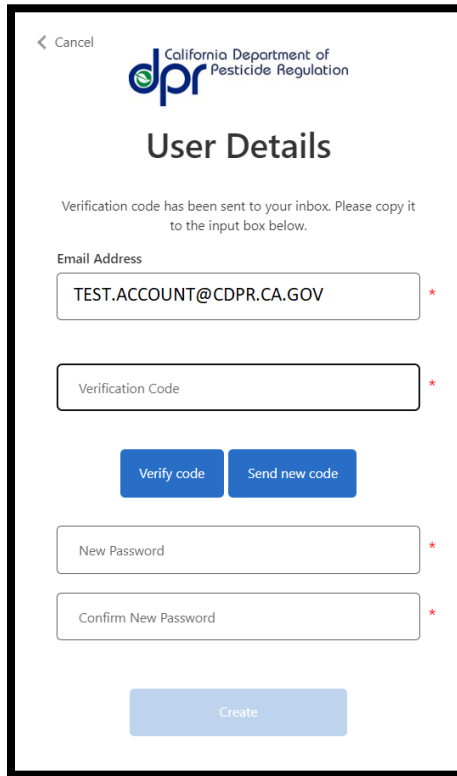


The screenshot shows a mobile application interface for the California Department of Pesticide Regulation. At the top left is a back arrow and the word 'Cancel'. The department logo and name are at the top center. Below the logo is the title 'User Details'. The form contains an 'Email Address' field with the text 'TEST.ACCOUNT@CDPR.CA.GOV' and a red asterisk to its right. Below this is a blue button labeled 'Send verification code'. Underneath are two password fields: 'New Password' and 'Confirm New Password', both with red asterisks to their right. At the bottom is a light blue button labeled 'Create'.


A one-time verification code will be sent to the email address that was entered. The user will enter the one-time verification into the Verification Code field and click Verify code to proceed.

Alternatively, if the verification code has expired, the user can click Send new code to receive a new verification code.

Figure 3.9: User Details – Verify Code



< Cancel

 California Department of
Pesticide Regulation

User Details

Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

 * * * *

Once the code is verified, the user will be presented with the input boxes to enter and confirm the new password. The user will click Create to proceed.

Figure 3.10: User Details – Set Password

< Cancel

dpr California Department of Pesticide Regulation

User Details

E-mail address verified. You can now continue.

Email Address

TEST.ACCOUNT@CDPR.CA.GOV *

Change e-mail

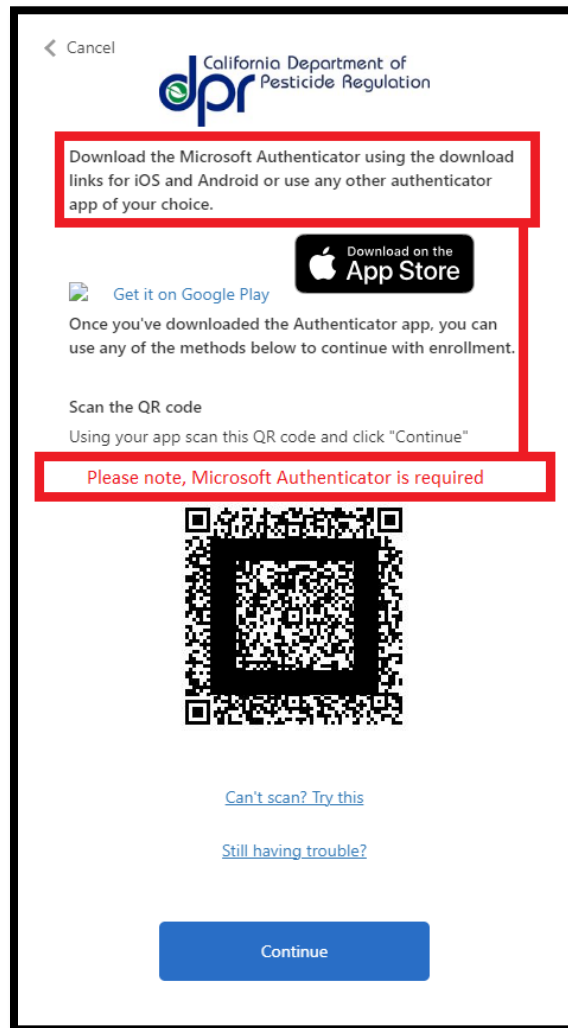
New Password *

Confirm New Password *

Create

Once the password is set, the user will see a page with instructions on downloading the Microsoft Authenticator app. The user will download and install the app to their phone or tablet. The user will click Continue once the QR Code has been scanned and added to the Authenticator app. Please note that CalPEST only works with Microsoft Authenticator, which will also be used to obtain verification codes when signing into CalPEST.

Figure 3.11: User Details – Scan QR Code – Authenticator App



The user must use the Authenticator app to view the code to be entered into the next page. Once the code has been entered, click Verify to proceed.

Figure 3.12: User Details – Authenticator App – Verify Code

The user will be taken to the Dashboard upon successful completion of the account registration process. The functionality associated with the dashboard is detailed in [section 3.6](#).

Figure 3.13: User Details – Successful login to CalPEST

3.2 User Authentication

3.2.1 User Sign In

The user will click the Sign In menu option in the top right corner of the page.

Figure 3.14: User Authentication Sign In

The user is presented with the Sign In page to enter their email and password details. After clicking the Sign In button, the user will be prompted to enter the code from the Microsoft Authenticator app on their phone or tablet.

Figure 3.15: User Sign In

California Department of Pesticide Regulation

Sign in

Sign in with your email address

TEST.ACCOUNT@CDPR.CA.GOV

.....

[Forgot your password?](#)

Sign in

Figure 3.16: User Sign In – Authenticator Verification

< Cancel

California Department of Pesticide Regulation

Enter the verification code from your authenticator app.

Enter your code.

Verify

3.2.2 Forgot Password

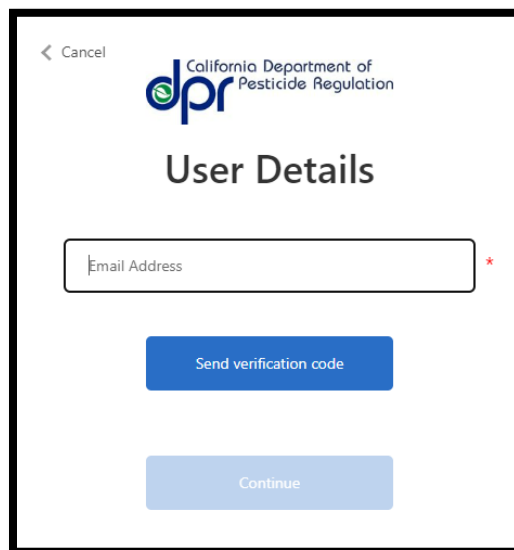
The user will click the [Forgot your password?](#) link to begin the process of obtaining a new password for authentication to CalPEST.

Figure 3.17: User Sign In – Forgot Password



The user will be directed to the User Details verification popup. The user will enter an email address and click Send verification code to proceed.

Figure 3.18: Forgot Password – Send Verification Code



A one-time verification code will be sent to the email address that was entered. The user will enter the verification code and click Verify code to proceed.

If the verification code has expired, the user can click Send new code to receive a new verification code.

Figure 3.19: Forgot Password – Verify Code

The screenshot shows a mobile application interface for account verification. At the top left is a 'Cancel' button with a back arrow. The header features the 'dpr' logo and the text 'California Department of Pesticide Regulation'. The main title is 'User Details'. Below the title, a message states: 'Verification code has been sent to your inbox. Please copy it to the input box below.' There are two input fields: the first contains the email address 'TEST.ACCOUNT@CDPR.CA.GOV' and the second is labeled 'Verification Code'. Both fields have a red asterisk to their right. Below the input fields are two blue buttons: 'Verify code' and 'Send new code'. At the bottom center is a light blue 'Continue' button.

Once the user is verified, click Continue to proceed. To change the email associated with the account, refer to [section 3.3.5](#).

Figure 3.20: Forgot Password – Account Verified

The screenshot shows the same 'User Details' screen after successful verification. The message now reads: 'E-mail address verified. You can now continue.' The email address 'TEST.ACCOUNT@CDPR.CA.GOV' is still in the input field. A blue 'Change e-mail' button is now visible below the input field. The 'Continue' button remains at the bottom center.

After clicking Continue, the user will be prompted to enter the code from the Microsoft Authenticator app on their phone or tablet.

Figure 3.21: User Sign In – Authenticator Verification

< Cancel

dpr California Department of Pesticide Regulation

Enter the verification code from your authenticator app.

Enter your code.

Verify

The user will be able to enter and confirm the new password to be used with the account. Click Continue to proceed.

Figure 3.22: Forgot Password – Set New Password

< Cancel

dpr California Department of Pesticide Regulation

User Details

New Password *

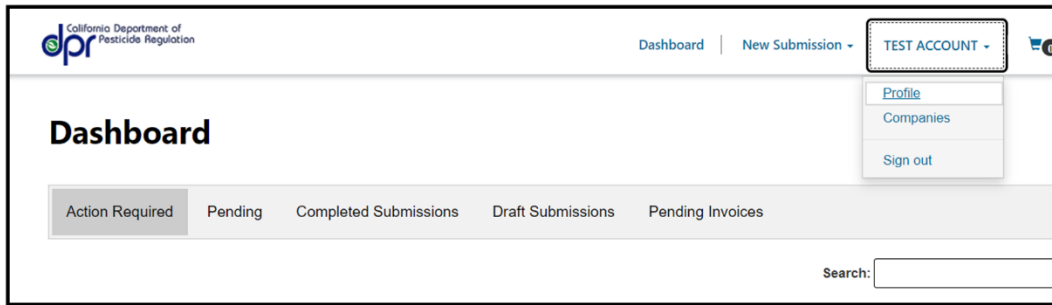
Confirm New Password *

Continue

3.3 User Profile

The User Profile can be accessed by clicking the user's name displayed on the Main Menu at the top of the page. This action will open a set of menu options, and the user can then click on Profile to proceed.

Figure 3.23: Accessing User Profile



The User Profile is available from the set of menu options on the left side of the page. Users can access:

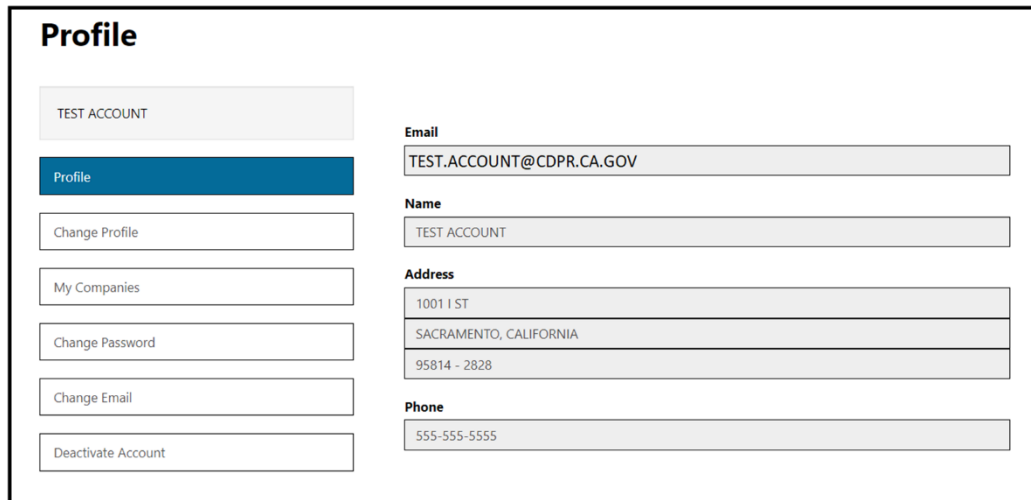
- Profile
- Change Profile
- My Companies
- Change Password
- Change Email
- Deactivate Account

3.3.1 Profile

The Profile will display the following information to the user:

- Email
- Name
- Address
- Phone

Figure 3.24: Profile



3.3.2 Change Profile

The Change Profile page gives the user the ability to edit the displayed name and contact information.

Figure 3.25: Change Profile

Change Profile

TEST ACCOUNT * = Required

Profile

Change Profile

My Companies

Change Password

Change Email

Deactivate Account

Name

First Name *

TEST

Last Name *

ACCOUNT

Contact Information

Street 1 *

1001 I ST

Street 2

City *

SACRAMENTO

State *

CALIFORNIA

ZIP Code *

95814

ZIP+4 Code

2828

Phone *

555-555-5555

Submit

When the user clicks the Submit button, the address is sent through a USPS Verification service to obtain the most accurate address details:

Figure 3.26: USPS Verification – Use Recommended

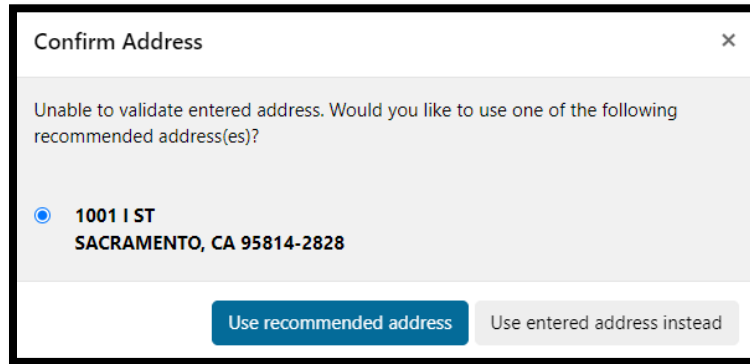
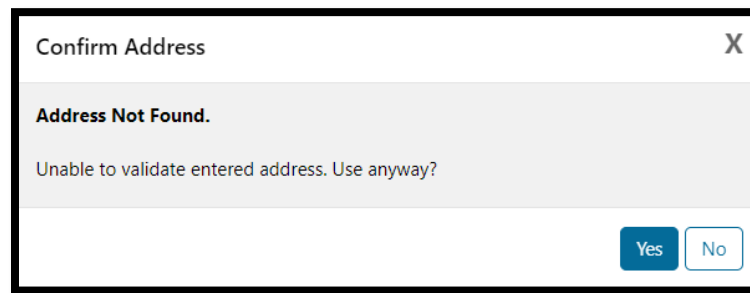


Figure 3.27: USPS Verification – No Address Match

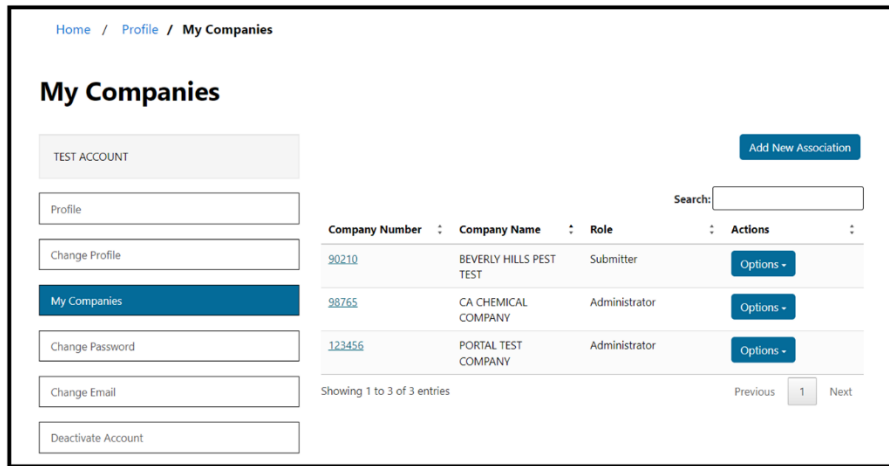


3.3.3 My Companies

My Companies displays all companies the user is associated with. The following data is displayed within the grid:

- Company Number
- Company Name
- Role
- Options dropdown
 - Change Role
 - Disassociate

Figure 3.28: My Companies



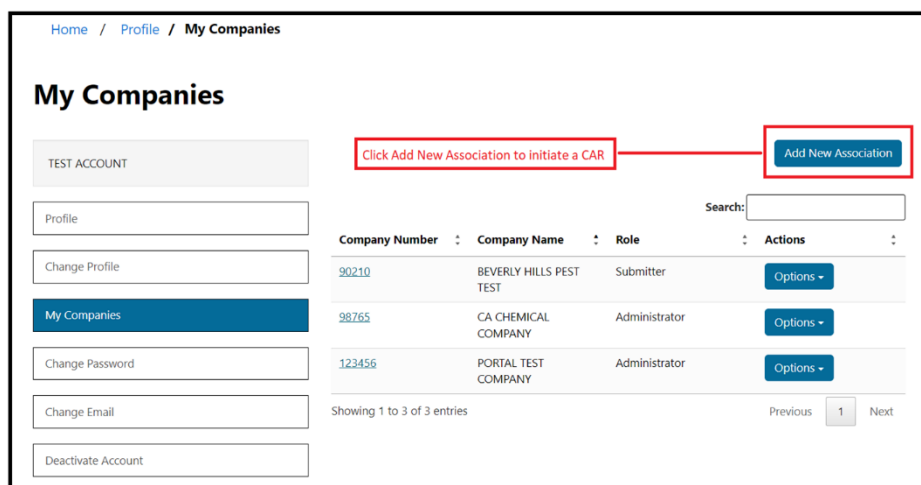
My Companies will allow the user to submit the following requests:

- Company Association Request (CAR)
- Company Creation Request (CCR)
- Company Role Request (CRR)
- Company Disassociation Request (CDR)

3.3.3.1 Company Association Request (CAR)

To use CalPEST to submit and review applications on behalf of any company, whether as an employee or an agent/consultant, the user must first be associated to the company by submitting a CAR. The user will be able to submit a CAR from the My Companies page in the Profile by clicking Add New Association.

Figure 3.29: Initiate a CAR



A popup will be displayed with a Notice to the user. The checkbox will need to be selected to enable the Continue button.

Figure 3.30: Notice

NOTICE

Use this form to request access to view or make submissions for another company. This form should only be used AFTER you have been in contact with that company and they have requested your professional services. DO NOT use this form to send unsolicited access requests. Doing so may result in your CalPEST access being revoked.

By checking this box, I confirm that I am currently authorized to operate on behalf of the company with which I am requesting association. I agree not to request association with any company I am not authorized to work for.

User must acknowledge the notice to enable Continue button.

After clicking Continue, the user will be routed to the CAR popup. The user will:

- Select a company from the lookup
 - If the company does not exist, then the user can click the link to be redirected to the Company Creation Request (CCR) page
- ! Pro Tip: Click on the magnifying glass icon to open the company lookup
- Select a role
 - Administrator
 - Company Administrators can perform the actions of Company Submitters (listed below) as well as update the company address, manage the users associated with the company, voluntarily cancel product registrations, and change the submission contact for any active submissions.
 - Submitter
 - Company Submitters can generate a copy of the company license, complete the checkout process for new submissions, and track/update the submissions for which they are the contact.
- Upload an Authorization Letter on company letterhead
 - This document must be a PDF and is only required when there is not an established Company Administrator in CalPEST for the selected company. If no Company Administrator has been established, DPR will review the CAR for approval. If the PDF does not specifically state that the user is authorized to be a Company Administrator, DPR can only approve the role of a Company Submitter. Once a Company Administrator has been established, the Company Administrator(s) will review subsequent CARs for approval.

Figure 3.31: CAR – Initial View

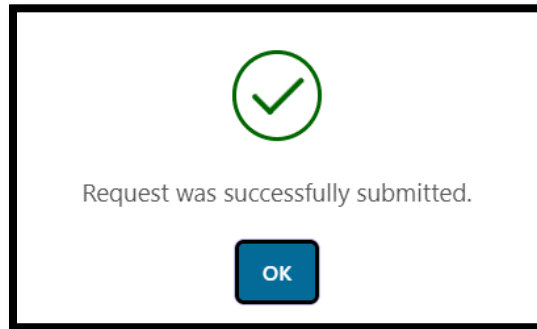
The screenshot shows a web form titled "Company Association Request (CAR)". At the top, it indicates "* = Required". The first field is "Company Number | Company Name *", which is an empty search bar with a magnifying glass icon. Below this is a link: "Don't see a company? Submit a Company Creation Request to add a company to the search." The next field is "Role *", a dropdown menu currently showing "Select" with a list of options: "Select", "Administrator", and "Submitter". Below the role field is "Letter of Authorization *", which includes a "Choose Files" button and the text "No file chosen". A blue "Submit" button is located at the bottom left of the form.

All required data must be entered for the CAR to be successfully submitted. All required fields will be marked with an asterisk (*), and validation messaging will be displayed when applicable. Once a Company Administrator has been established, the Letter of Authorization field is no longer required.

Figure 3.32: CAR – Validation Message

This screenshot shows the same "Company Association Request (CAR)" form as Figure 3.31, but with a validation message displayed at the top. The message, in a light red box, states: "The form could not be submitted for the following reasons: Company Number | Company Name is a required field. Role is a required field." Below the message, the form fields are visible. The "Company Number | Company Name" field is empty. The "Role" dropdown menu is open, showing "Select" as the selected option. The "Letter of Authorization" field is also visible with the "Choose Files" button and "No file chosen" text. The "Submit" button is at the bottom left.

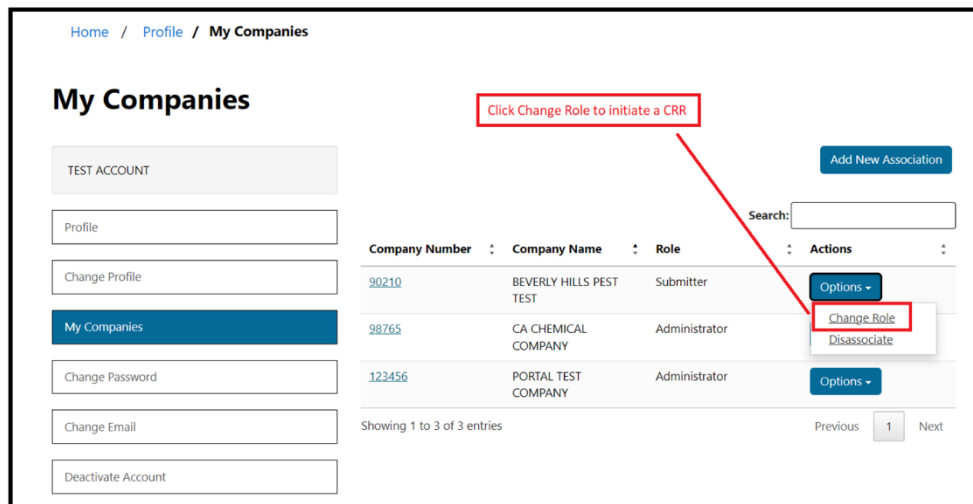
Figure 3.33: CAR – Success



3.3.3.2 Company Role Request (CRR)

A user may need to change the role that they have for an associated company. A CRR can be initiated from the Options button.

Figure 3.34: Initiate a CRR



After clicking Change Role, the user will be routed to the CRR popup. The user will:

- Select a Role
 - The user will only see the available Role option in the dropdown menu
- Upload an Authorization Letter on company letterhead
 - This document must be a PDF and is only required when there are no active Company Administrators associated to the selected company. If the letter does not state that the user should be a Company Administrator, the role will default to Company Submitter.

Figure 3.35: CRR – Initial View

The screenshot shows a web form titled "Company Role Request (CRR)". At the top left, there is a legend: "* = Required". The form contains the following fields:

- Company Number**: A text input field containing the value "123456".
- Company Name**: A text input field containing the value "PORTAL TEST COMPANY".
- Role ***: A dropdown menu with "Select" and a downward arrow.
- Letter of Authorization ***: A file upload field with a "Choose Files" button and the text "No file chosen".

At the bottom left of the form is a blue "Submit" button.

All required data must be entered for the CRR to be successfully submitted. All required fields will be marked with an asterisk (*), and validation messaging will be displayed when applicable. A Letter of Authorization is required if no Company Administrator has been established.

Figure 3.36: CRR – Validation Message

Company Role Request (CRR)

❗ The form could not be submitted for the following reasons:
[Role is a required field.](#)
[Authorization Letter is a required document.](#)

* = Required

Company Number
123456

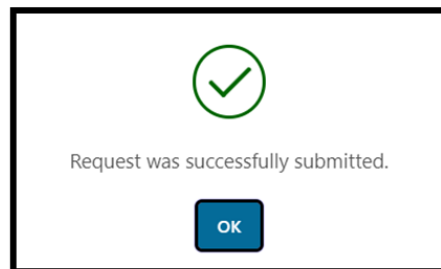
Company Name
PORTAL TEST COMPANY

Role *
Select

Letter of Authorization *
Choose Files No file chosen

Submit

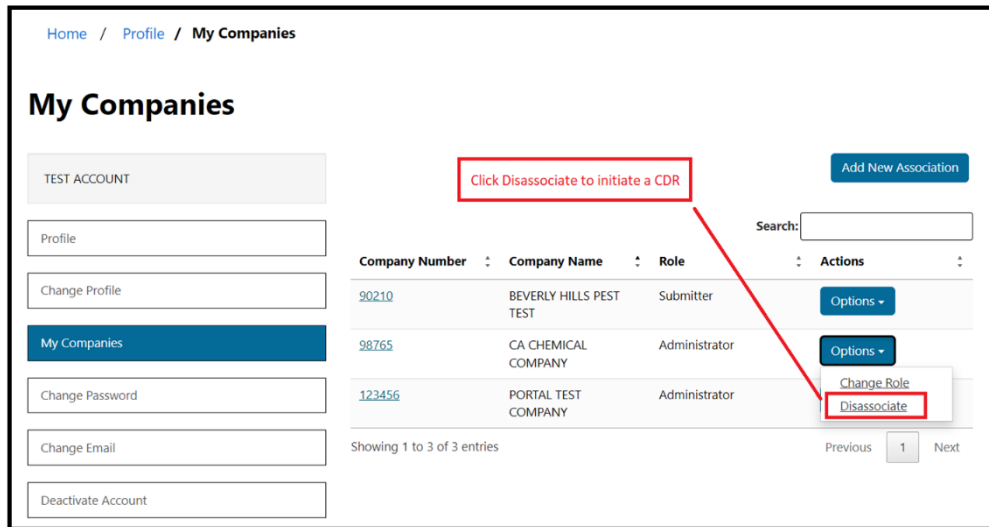
Figure 3.37: CRR – Success



3.3.3.3 Company Disassociation Request (CDR)

A user may need to disassociate from a company. A CDR can be completed from the Options button.

Figure 3.38: Initiate a CDR



The user will be presented with a warning popup. Click Continue to proceed with the CDR.

Figure 3.39: CDR – Warning

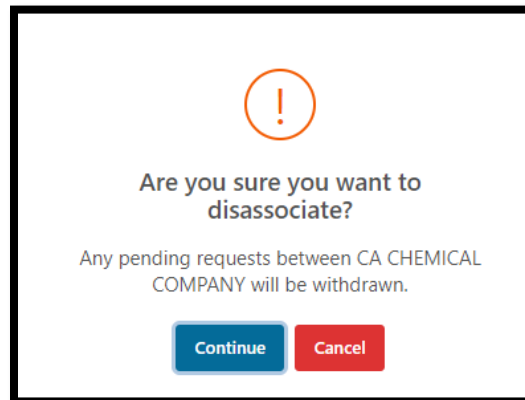
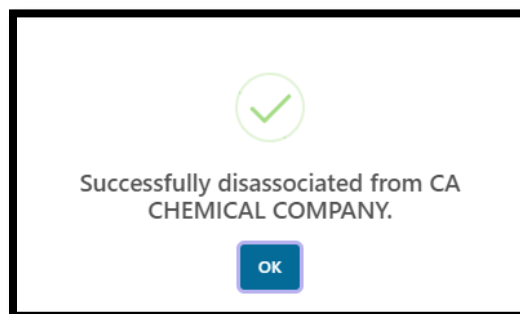


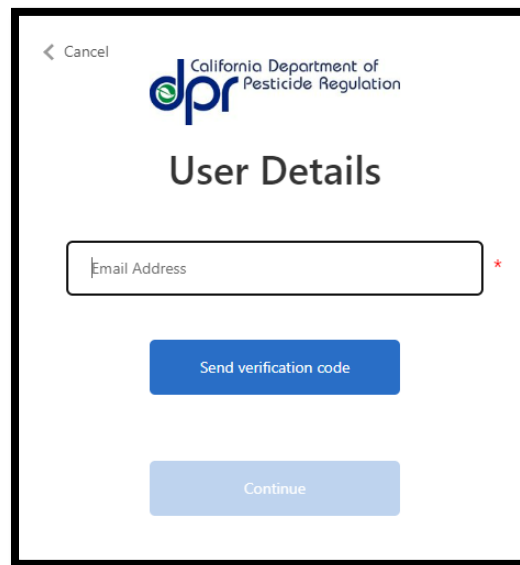
Figure 3.40: CDR – Success



3.3.4 Change Password

The user will be able to update the password used to sign into CalPEST by navigating to the Change Password page. Clicking Change Password will step the user through the process. The user will be directed to the User Details verification popup. The user will enter an email address and click Send verification code to proceed.

Figure 3.41: Change Password – Send Verification Code



The screenshot shows a mobile application interface for the 'User Details' verification step. At the top left, there is a back arrow and the text 'Cancel'. The dpr logo and 'California Department of Pesticide Regulation' are centered at the top. Below this, the title 'User Details' is displayed. A text input field with the placeholder 'Email Address' is present, followed by a red asterisk. Two buttons are located below the input field: a blue button labeled 'Send verification code' and a light blue button labeled 'Continue'.

A one-time verification code will be sent to the email address that was entered. The user will enter the verification code and click Verify code to proceed.

If the verification code has expired, the user can click Send new code to receive a new verification code.

Figure 3.42: Change Password – Verify code

The screenshot shows a mobile application interface for the California Department of Pesticide Regulation. At the top left is a back arrow and the word 'Cancel'. The logo 'dpr' and the text 'California Department of Pesticide Regulation' are at the top center. Below the logo is the title 'User Details'. A message states: 'Verification code has been sent to your inbox. Please copy it to the input box below.' There are two input fields: the first contains the email address 'Test.Account@CDPR.CA.GOV' and the second is labeled 'Verification Code'. Below the input fields are two blue buttons: 'Verify code' and 'Send new code'. At the bottom is a light blue button labeled 'Continue'.

Once the user is verified, click Continue to proceed.

Figure 3.43: Change Password – User Verified

The screenshot shows the same mobile application interface as Figure 3.42. The title 'User Details' is present. A message states: 'E-mail address verified. You can now continue.' Below the message is an input field containing the email address 'Test.Account@CDPR.CA.GOV'. Below the input field are two blue buttons: 'Change e-mail' and 'Continue'.

The user can now enter a new password. The user must enter the same new password in the Confirm New Password box and click the Continue button to proceed. The user is then taken to the dashboard.

Figure 3.44: Change Password – Set New Password

The screenshot shows a mobile application interface for the California Department of Pesticide Regulation. At the top left is a back arrow and the word 'Cancel'. The logo 'dpr' and the text 'California Department of Pesticide Regulation' are at the top center. Below the logo is the title 'User Details'. There are two input fields: 'New Password' and 'Confirm New Password', both with a red asterisk to their right. At the bottom is a blue button labeled 'Continue'.

3.3.5 Change Email

The email address associated with the user can be updated by accessing the Change Email screen. Clicking Change Email will open the user details screen. The user will enter their current email address and password and click Continue.

Figure 3.45: Change Email – Current User Details

The screenshot shows a mobile application interface for the California Department of Pesticide Regulation. At the top left is a back arrow and the word 'Cancel'. The logo 'dpr' and the text 'California Department of Pesticide Regulation' are at the top center. Below the logo is the title 'User Details'. There are two input fields: 'Email Address' and 'Password', both with a red asterisk to their right. At the bottom is a blue button labeled 'Continue'.

The user will then be prompted to enter a new email address. Once the new email address has been entered, the user will click Send verification code.

Figure 3.46: Change Email – Send Verification Code

< Cancel

dpr California Department of Pesticide Regulation

User Details

Verification is necessary. Please click Send button.

 *

Send verification code

Continue

A one-time verification code will be sent to the email address that was entered. The user will enter the verification code and click Verify code to proceed.

If the verification code has expired, the user can click Send new code to receive a new verification code.

Figure 3.47: Change Email – Verify Code

< Cancel

dpr California Department of Pesticide Regulation

User Details

Verification code has been sent to your inbox. Please copy it to the input box below.

NEW.EMAIL.ADDRESS@CDPR.CA.GOV *

Verification code

Verify code Send new code

Continue

Once the user is verified, click Continue to proceed.

Figure 3.48: Change Email – User Verified

< Cancel

dpr California Department of Pesticide Regulation

User Details

E-mail address verified. You can now continue.

NEW.EMAIL.ADDRESS@CDPR.CA.GOV *

Change e-mail

Continue

The user will enter the verification code from the Authenticator app that is associated with the old email address and click Verify to proceed.

Figure 3.49: Change Email – Authenticator Verification

The screenshot shows a mobile application interface for the California Department of Pesticide Regulation. At the top left is a back arrow and the word "Cancel". In the center is the department's logo and name. Below the logo, the text reads "Enter the verification code from your authenticator app." There is a text input field with the placeholder text "Enter your code." and a blue button labeled "Verify" at the bottom.

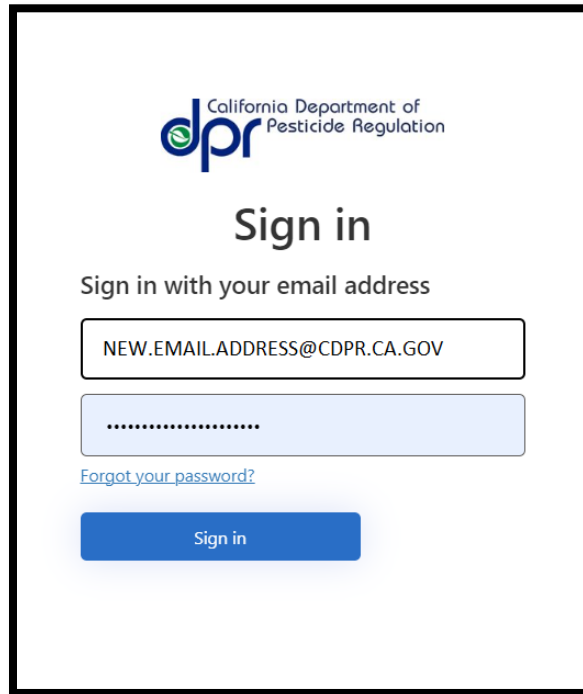
The user will be taken to the Dashboard upon successful completion of the change email process.

Figure 3.50: Change Email – Successful login to CalPEST

The screenshot displays the CalPEST Dashboard. The title "Dashboard" is at the top left. Below it is a horizontal menu with five tabs: "Action Required" (which is selected and highlighted), "Pending Submissions", "Completed Submissions", "Draft Submissions", and "Pending Invoices". To the right of the tabs is a search bar labeled "Search:". Below the search bar is a table header with columns: "Received Date", "CALPEST ID", "Type", "Company", "Product Name", "Registration Number", and "Status". The table body contains the text "No action required". At the bottom left, it says "Showing 0 to 0 of 0 entries", and at the bottom right, there are "Previous" and "Next" navigation links.

Upon the next sign in to CalPEST, the user will enter the new email address along with the password and click Sign in.

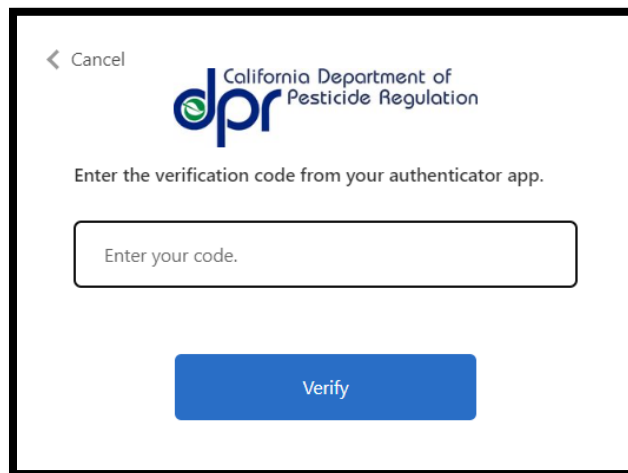
Figure 3.51: Change Email – Sign in



The screenshot shows the CalPEST Sign in page. At the top is the dpr logo and the text "California Department of Pesticide Regulation". Below this is the heading "Sign in" and the instruction "Sign in with your email address". There are two input fields: the first contains the placeholder text "NEW.EMAIL.ADDRESS@CDPR.CA.GOV" and the second is a password field with dots. A blue link "Forgot your password?" is located below the password field. At the bottom is a blue "Sign in" button.

The user will once again enter the verification code from the Authenticator app that is associated with the old email address and click Verify to proceed.

Figure 3.52: Change Email – Authenticator Verification

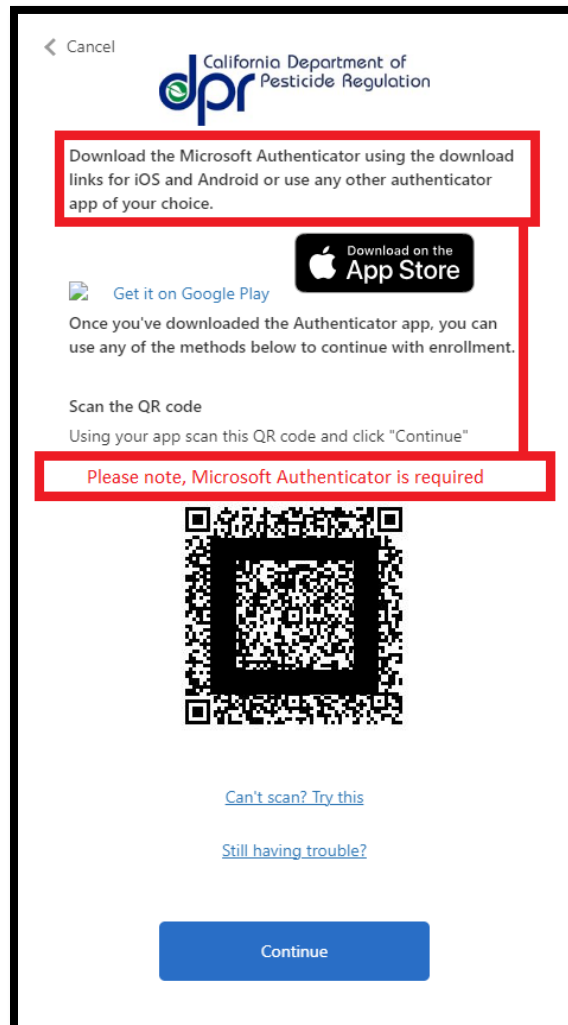


The screenshot shows the CalPEST Authenticator Verification page. At the top left is a "Cancel" link with a back arrow. Below this is the dpr logo and the text "California Department of Pesticide Regulation". The instruction "Enter the verification code from your authenticator app." is centered. Below this is a text input field with the placeholder "Enter your code.". At the bottom is a blue "Verify" button.

The user will see a page with instructions on downloading the Microsoft Authenticator app. The user will open the app on a phone or tablet and scan the QR code. The user will click Continue once the QR code has been scanned and added to the Authenticator app. Please note that this app will also be used to obtain verification codes when

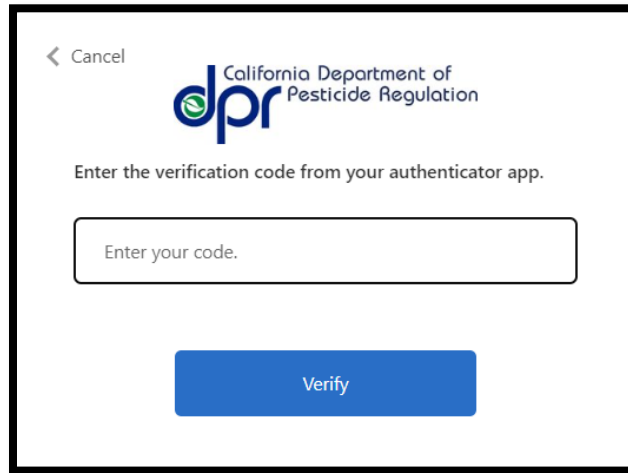
signing into CalPEST, and the user must manually remove the account associated with the previous email address.

Figure 3.53: Change Email – Scan QR Code – Authenticator App



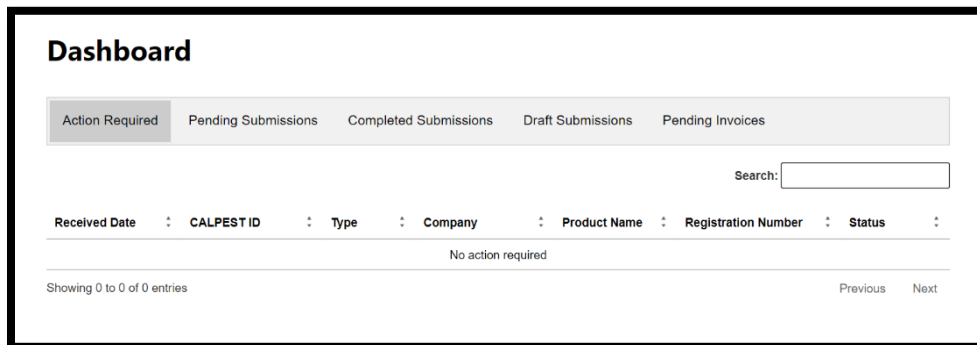
The user must use the Authenticator app to view the code to be entered into the next page. Once the code has been entered, click Verify to proceed.

Figure 3.54: Change Email – Authenticator App – Verify Code



The user will be taken to the Dashboard upon successful completion of the account registration process.

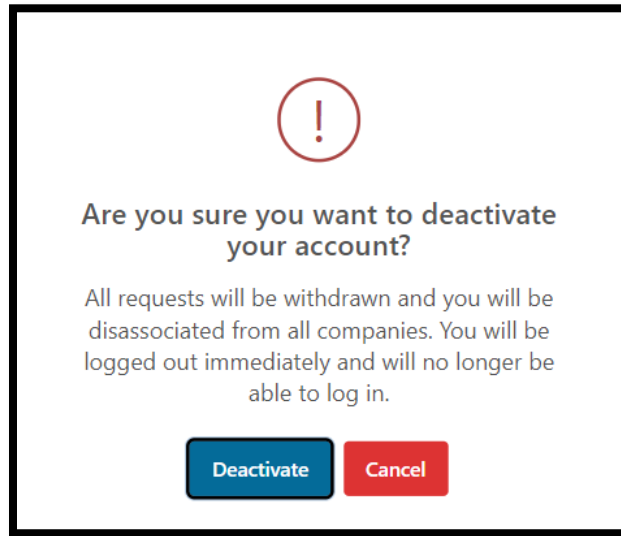
Figure 3.55: Change Email – Successful login to CalPEST



3.3.6 Deactivate Account

Users can deactivate their CalPEST account by clicking on the Deactivate Account tab from the user profile and confirming with the Deactivate button on the pop-up. Any requests associated with any Companies will be withdrawn, draft submissions will be deleted, and the user will be logged out of CalPEST. Pending submissions will not be withdrawn, and the user will continue to receive email notifications until the submission contact has been changed.

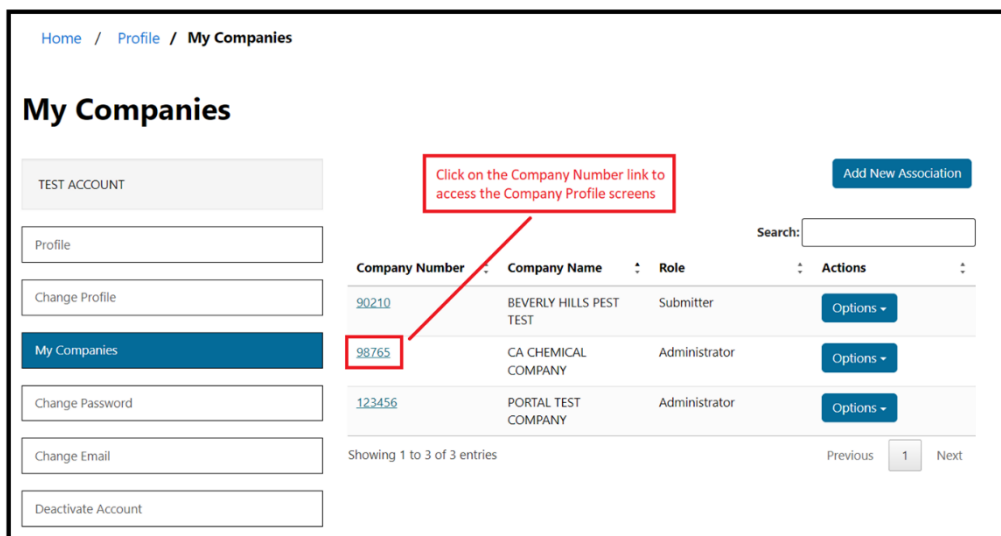
Figure 3.56: Deactivate Account



3.4 Company Profile

Users can access the Company Profile from the My Companies page in the Profile. Clicking the Company Number link will direct the user to the Company Profile.

Figure 3.57: Accessing Company Profile



3.4.1 Company Profile

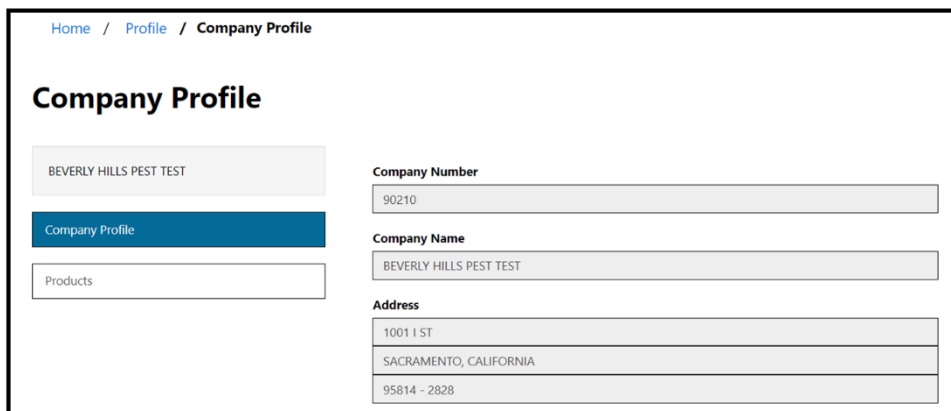
The Company Profile screen displays the following details to the user:

- Company Number
- Company Name
- Address

Users will be able to access menu options based on their user role.

- Company Submitter
 - Company Profile
 - Products
- Company Administrator
 - Company Profile
 - Change Company Profile
 - Associations
 - Products
 - Pending Submissions

Figure 3.58: Company Profile – Submitter View



Home / Profile / Company Profile

Company Profile

BEVERLY HILLS PEST TEST

Company Profile

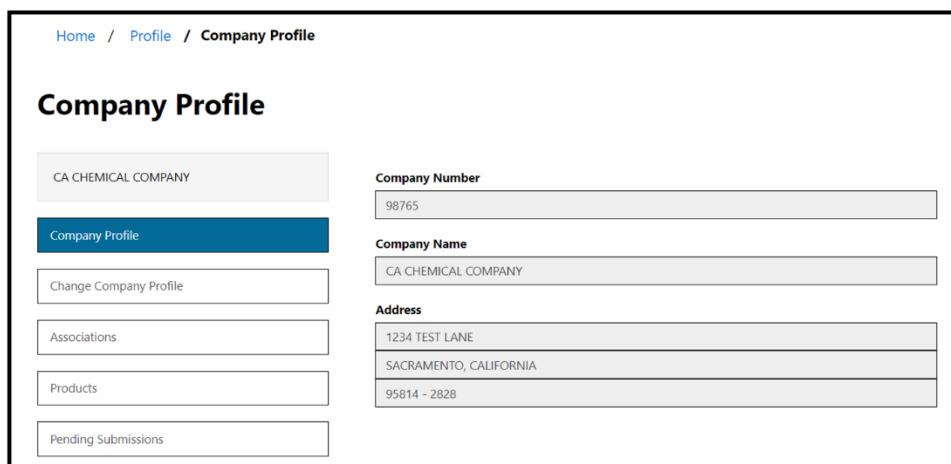
Products

Company Number
90210

Company Name
BEVERLY HILLS PEST TEST

Address
1001 I ST
SACRAMENTO, CALIFORNIA
95814 - 2828

Figure 3.59: Company Profile – Administrator View



Home / Profile / Company Profile

Company Profile

CA CHEMICAL COMPANY

Company Profile

Change Company Profile

Associations

Products

Pending Submissions

Company Number
98765

Company Name
CA CHEMICAL COMPANY

Address
1234 TEST LANE
SACRAMENTO, CALIFORNIA
95814 - 2828

3.4.2 Change Company Profile

Users with the Company Administrator role will have the ability to change a company's details from the Change Company Profile menu option. Once the screen is selected, the user can update contact information for the company. The Company Number and Company Name will be displayed as read-only fields. The user may submit a Company Name Request to change the company name, however once a Company Number is issued by DPR or U.S. EPA, it may not be changed within the portal and a new Company needs to be created through a Company Creation Request. Address fields will be presented based on the Country selected from the lookup:

- United States
 - Street 1
 - Street 2
 - City
 - State
 - Zip
 - Zip + 4
- International
 - Line 1
 - Line 2

Figure 3.60: Change Company Profile

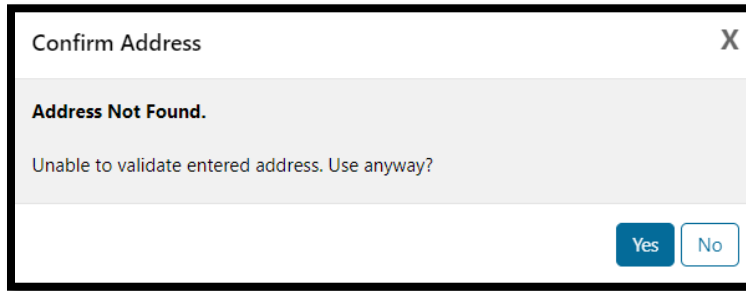
The screenshot shows a web form titled "Change Company Profile". On the left is a sidebar with navigation links: "CA CHEMICAL COMPANY", "Company Profile", "Change Company Profile" (highlighted in blue), "Associations", "Products", and "Pending Submissions". The main content area is divided into two sections. The top section contains fields for "Company Number" (98765) and "Company Name" (CA CHEMICAL COMPANY), with a note: "Need to change your company name? Submit a Company Name Request." The bottom section is titled "Contact Information" and includes fields for "Country" (UNITED STATES), "Street 1" (1001 I ST), "Street 2", "City" (SACRAMENTO), "State" (CALIFORNIA), "ZIP Code" (95814), and "ZIP+4 Code" (2828). A "Submit" button is located at the bottom center.

When the user clicks the Submit button, the address is sent through a USPS Verification service to obtain the most accurate address details.

Figure 3.61: USPS Verification – Use Recommended Address

The screenshot shows a "Confirm Address" dialog box with a close button (X) in the top right corner. The message reads: "Unable to validate entered address. Would you like to use one of the following recommended address(es)?". Below the message is a radio button selected next to the address: "1001 I ST SACRAMENTO, CA 95814-2828". At the bottom are two buttons: "Use recommended address" (highlighted in blue) and "Use entered address instead".

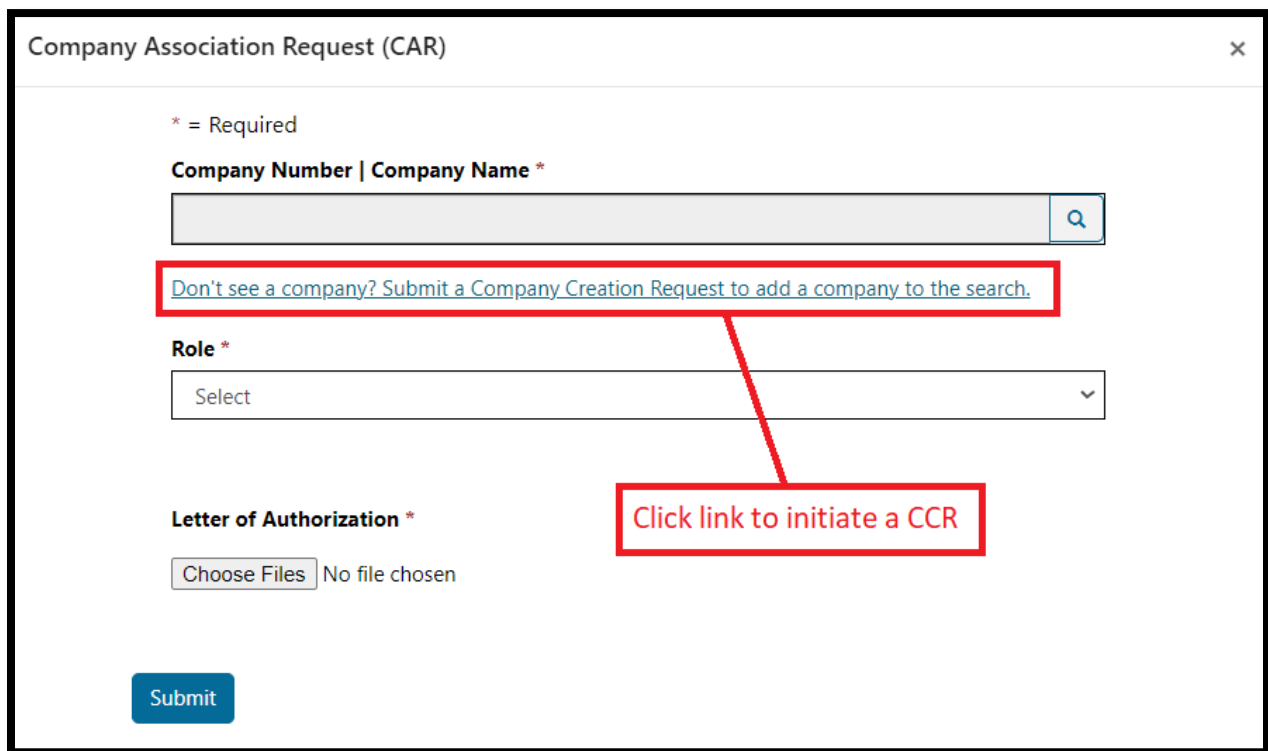
Figure 3.62: USPS Verification – No Address Match



3.4.3 Company Creation Request (CCR)

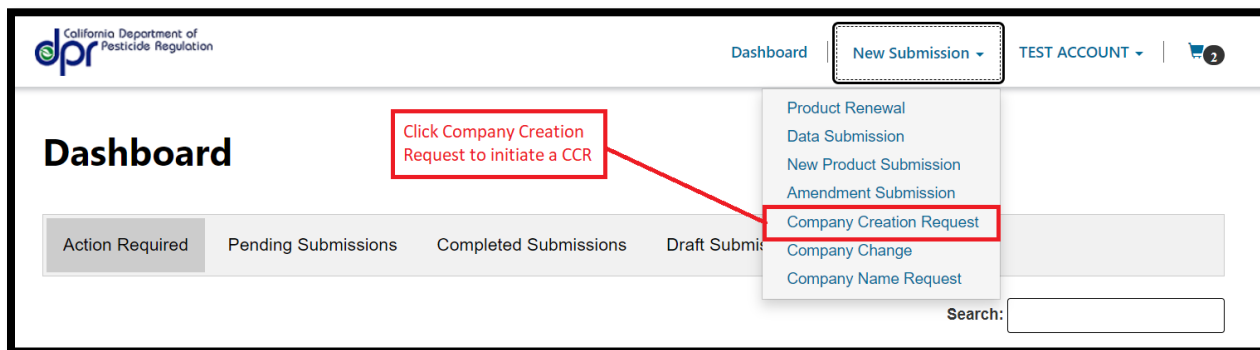
If a company is not found when trying to submit a CAR, the user will have the ability to submit a CCR. The user will click the “Don’t see a company? Submit a Company Creation Request to add a company to the search” link to proceed.

Figure 3.63: Initiate a CCR – Option 1



The user will also be able to submit a CCR via the New Submission dropdown:

Figure 3.64: Initiate a CCR – Option 2



3.4.3.1 Details

The user will enter the new company information on the CCR form:

- California-Only Company indicator (optional)
- Government Entity indicator (optional)
- Company Number
 - This value will be automatically assigned after approval if the California-Only Company indicator is selected.
- Company Name
- Country (lookup)

The address fields will dynamically display based on the Country selected from the lookup. This will allow users to enter address information correctly for international companies.

- United States
 - Street 1
 - Street 2
 - City
 - State
 - Zip
 - Zip + 4
- International
 - Line 1
 - Line 2

Figure 3.65: CCR – Initial View

Company Creation Request - Details

Note: Progress will not be saved.

1 Details **2** Summary

The purpose of this form is to request approval of a company in CalPEST when you do not find the company in the company search. If you need help or more information about this request, please visit the Help page. Please note, you will not be able to submit a Company Association Request with this company until DPR has approved the Company Creation Request.

* = Required

California-Only Company *

No ▼

Government Entity *

No ▼

Company Number *

Company Name *

Contact Information

Country *

Select a Country ▼

Street 1 *

Street 2

City *

State *

Select a State ▼

ZIP Code *

ZIP+4 Code

Figure 3.66: Address Details – International Country

Contact Information

Country *

UNITED KINGDOM ▼

Line 1 *

Line 2 *

All required data must be entered for the CCR to be successfully submitted. All required fields will be marked with an asterisk (*), and validation messaging will be displayed when applicable.

Figure 3.67: CCR – Validation Message

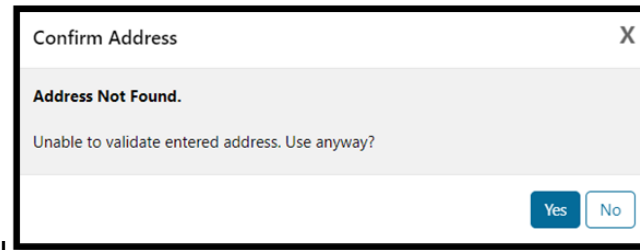
The screenshot shows a web form titled "Company Creation Request - Details". At the top, a message states: "The form could not be submitted for the following reasons:" followed by a list of seven required fields: Company Number, Company Name, Country, Street 1, City, State, and ZIP Code. Below this is a yellow "Note" box: "Note: Progress will not be saved." A progress bar shows "1 Details" as the active step and "2 Summary" as the next step. A paragraph explains the form's purpose and provides a link to the Help page. Below this, a legend indicates that an asterisk (*) denotes a required field. Two dropdown menus are visible, both set to "No": "California-Only Company *" and "Government Entity *".

When the user clicks the Continue button, the address is sent through a USPS Verification service to obtain the most accurate address details.

Figure 3.68: USPS Verification – Use Recommended

The screenshot shows a "Confirm Address" dialog box with a close button (X) in the top right corner. The text inside reads: "Unable to validate entered address. Would you like to use one of the following recommended address(es)?". Below this text, a radio button is selected next to the address "1001 I ST SACRAMENTO, CA 95814-2828". At the bottom of the dialog, there are two buttons: "Use recommended address" (highlighted in blue) and "Use entered address instead".

Figure 3.69: USPS Verification – No match



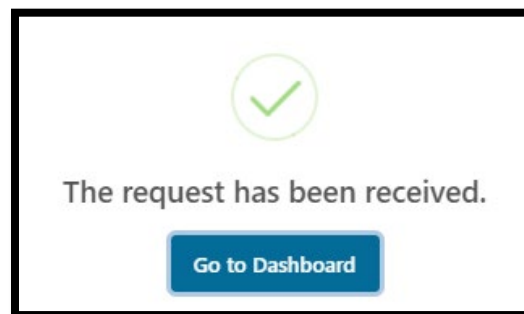
3.4.3.2 Summary

Once the user address verification step is complete, the Summary page will be displayed to the user as a final confirmation of the information submitted for the CCR. The user will see a summary of:

- Company Information
- Company Name
- Contact Information
- Terms and Conditions (DPR and CalPEST, linked)
 - Must be agreed to by user to submit CCR.

If any updates are needed, the user can click the Previous button to be routed back to the Details page. The user must acknowledge the Terms and Conditions statement by clicking the checkbox to enable the Submit button. A success message is displayed with a button to direct the user back to the dashboard.

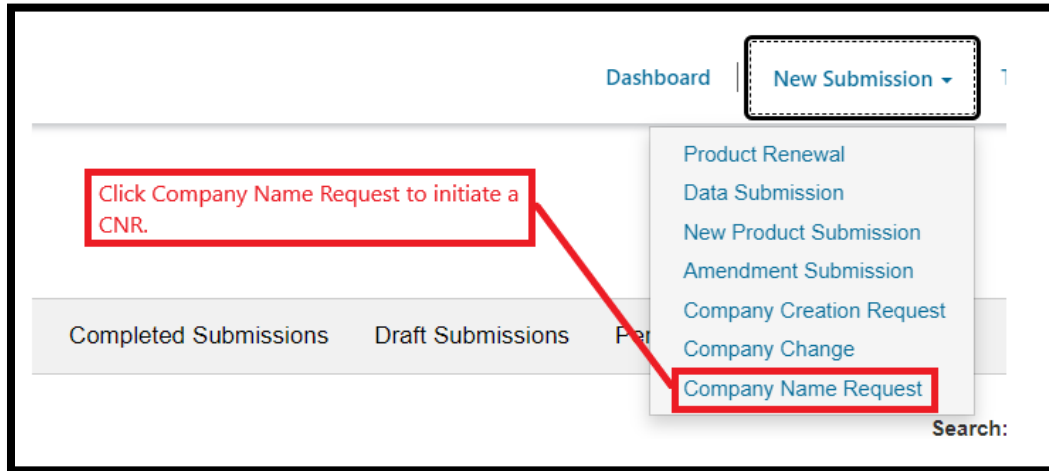
Figure 3.70: CCR – Success



3.4.4 Company Name Requests

Users will have the ability to submit a Company Name Request (CNR) to change the name of a company they are associated with. Users will access this by selecting Company Name Request from the New Submission dropdown.

Figure 3.71: Initiate a CNR



A wizard provides the user with a 3-step process to submit the CNR:

- Details
- Documents
- Summary

3.4.4.1 Details

The CNR screen has been created for the user to submit information for the new company name. Users will provide the following details:

- Company (former name)
- New Company Name
- I verify no change in company ownership occurred for the company's California product registrations.

Figure 3.72: CNR – Initial View

Company Name Request - Details

Note: If the company number is changing, submit a [Company Creation Request](#). If the company ownership is changing, submit a [Company Change](#) for each product.

1 Details 2 Documents 3 Summary

* = Required

Company *

Select a Company

New Company Name *

I verify no change in company ownership occurred for the company's California product registrations. *

Save & Continue

3.4.4.2 Documents

Users will be able to upload documents with the CNR. The application will allow for the following file types to be uploaded:

- .pdf
- .xls
- .xlsx
- .csv

Clicking + Select Documents will allow the user to select files to be uploaded with the PRO.

Figure 3.73: CNR – Documents – Initial View

Company Name Request - Documents

Note: If the company number is changing, submit a [Company Creation Request](#). If the company ownership is changing, submit a [Company Change](#) for each product.

1 Details ✓ 2 Documents 3 Summary

* = Required

+ Select Documents Upload

Uploaded Documents

Search documents...

Document Name	Document Category	Document Size	Action
No matching records found			

Previous Save & Continue

The selected documents will display within a grid:

- Document Name
- Document Category
- Document Size
- Action
 - Remove
- Status

Users will need to select a Document Category from the dropdown list for each selected document. Once this is completed, the user can click Upload.

Figure 3.74: CNR – Documents – Documents Selected

Company Name Request - Documents

Note: If the company number is changing, submit a [Company Creation Request](#). If the company ownership is changing, submit a [Company Change](#) for each product.

1 Details ✓
2 Documents
3 Summary

* = Required

+ Select Documents
Upload

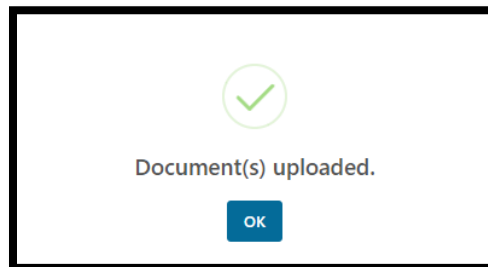
Selected Documents for Upload

0.00%

Document Name	Document Category *	Document Size	Action	Status
CNR form.pdf	Authorization Letter	18.95 KB	Remove	0.00%
U.S. EPA documentation.pdf	U.S. EPA Other	16.79 KB	Remove	0.00%

The user will see a progress indicator while the documents are being uploaded. Once the process is complete, a pop-up message will be displayed with a success message.

Figure 3.75: CNR – Documents Uploaded



The user will see the final screen where the documents have been uploaded to the submission. There is still the option to remove a document from the uploaded document grid when needed. The user will click Save and Continue to progress to the Summary screen.

Figure 3.76: CNR – Documents Uploaded

Company Name Request - Documents

Note: If the company number is changing, submit a [Company Creation Request](#). If the company ownership is changing, submit a [Company Change](#) for each product.

1 Details ✓
2 Documents
3 Summary

* = Required

+ Select Documents
Upload

Uploaded Documents

Document Name	Document Category	Document Size	Action
CNR form.pdf	Authorization Letter	18.95 KB	<input type="button" value="Remove"/>
U.S. EPA documentation.pdf	U.S. EPA Other	16.79 KB	<input type="button" value="Remove"/>

Previous
Save & Continue

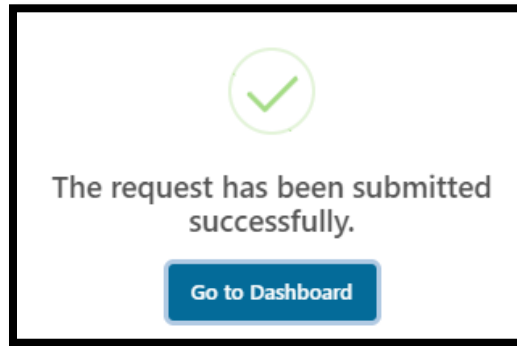
3.4.4.3 Summary

The Summary screen will be displayed to the user as a final confirmation of the data submitted for the CNR. If any updates are needed, the user can click the Previous button to be routed back to the Documents screen. The user will see a summary of:

- Company
- New Company Name
- I verify no change in company ownership occurred for the company’s California product registrations.
- Any uploaded documents will be displayed
- Terms and Conditions (DPR and CalPEST, linked)
 - Must be agreed to by user to submit CNR.

The user must acknowledge the Terms and Conditions statement by clicking the checkbox to enable the Submit button. Once the Submit button is clicked, the user will be presented with a pop-up message indicating that the request has been submitted successfully.

Figure 3.77: CNR – Success



3.4.5 Associations

Users with the Company Administrator role can view the current associations for the selected company.

- Association Date
- Name
- Role
- Actions
 - Change Role
 - Disassociate

Figure 3.78: Company Profile – Associations

The screenshot shows the "Associations" page for "CA CHEMICAL COMPANY". On the left is a sidebar with navigation options: "Company Profile", "Change Company Profile", "Associations" (highlighted in blue), "Products", and "Pending Submissions". The main content area has a search bar and a table of associations. The table has columns for "Association Date", "Name", "Role", and "Actions". There are five entries in the table, each with an "Options" button. At the bottom, it says "Showing 1 to 5 of 5 entries" and has "Previous", "1", and "Next" navigation links.

Association Date	Name	Role	Actions
07/26/2024	JOHNNY TEST	Submitter	Options ▾
07/12/2024	TEDDY S. BEARS	Submitter	Options ▾
06/24/2024	TEST ACCOUNT	Administrator	Options ▾
06/24/2024	TEST TESTINGTON	Administrator	Options ▾
07/10/2024	TEST TESTINGWAY	Administrator	Options ▾

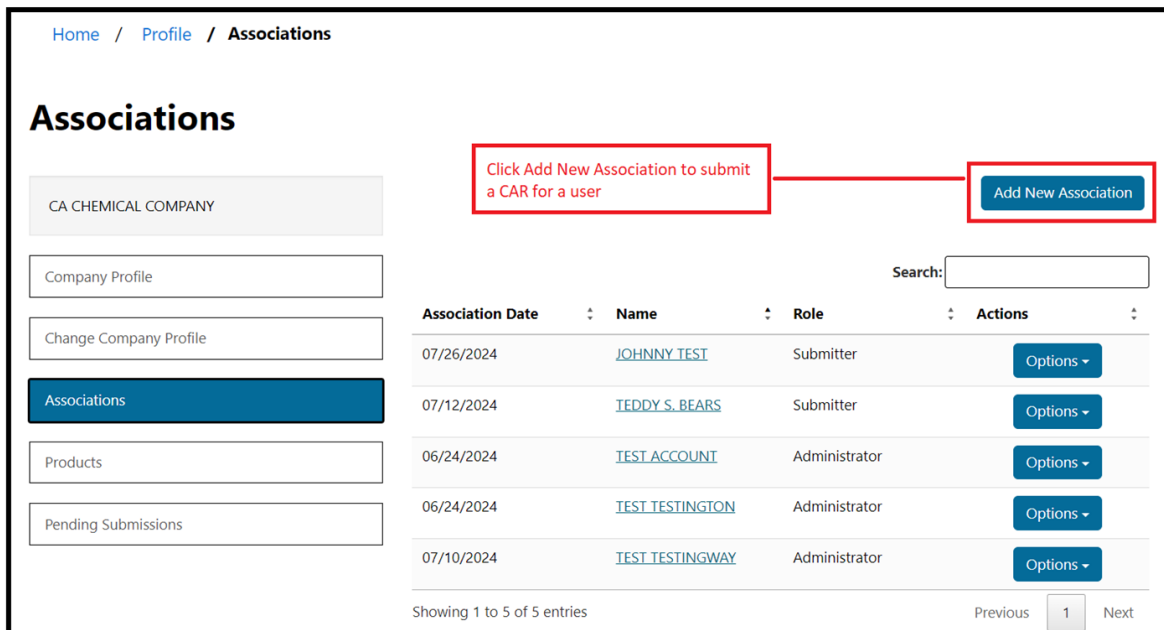
Company Administrators have access to the following features for managing company associations.

- Add New Association: Associate a registered user to the selected company
- Change Role: Change associated users' role for the selected company
- Disassociate: Disassociate a user for selected company

3.4.5.1 Add New Association

Company Administrators can associate another user to the company by clicking the Add New Association button.

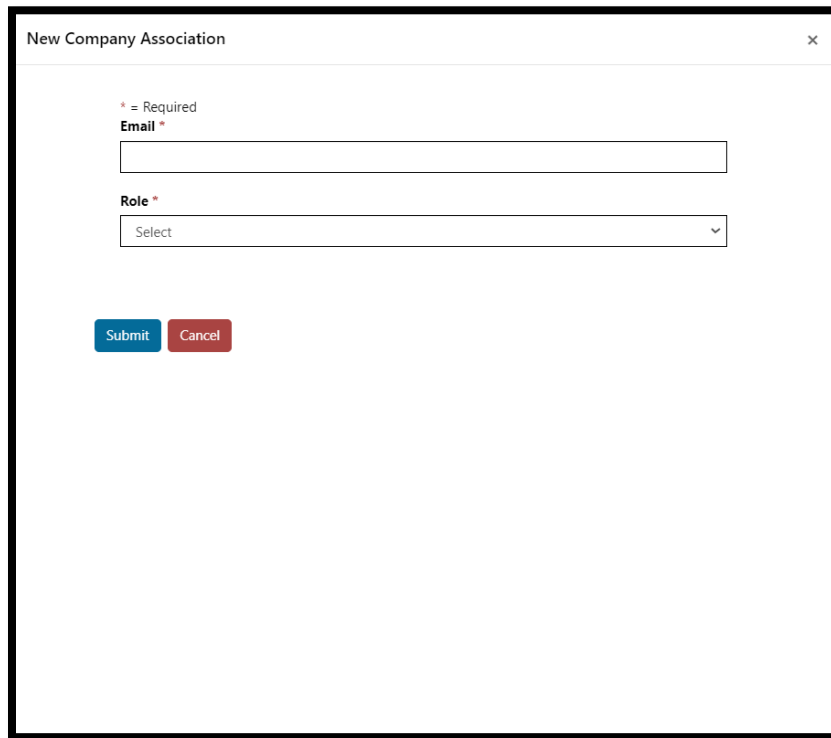
Figure 3.79: Add New Association



Company Administrators will be presented with a screen and will need to enter the user's details:

- Email – Must belong to a registered CalPEST user
- Role – May select either Submitter or Administrator

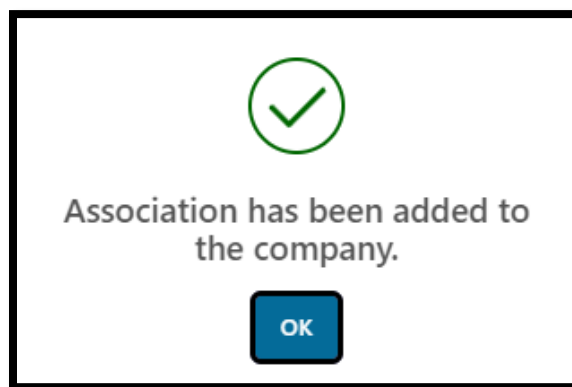
Figure 3.80: New Company Association – Initial View



The screenshot shows a web form titled "New Company Association" with a close button (X) in the top right corner. Below the title, there is a legend: "* = Required". The form contains two required fields: "Email" with an asterisk and a text input box, and "Role" with an asterisk and a dropdown menu currently showing "Select". At the bottom of the form, there are two buttons: a blue "Submit" button and a red "Cancel" button.

Once the Company Administrator clicks Submit, a pop-up will appear stating that the association was successful. The user will be immediately associated with the company and will be notified by email.

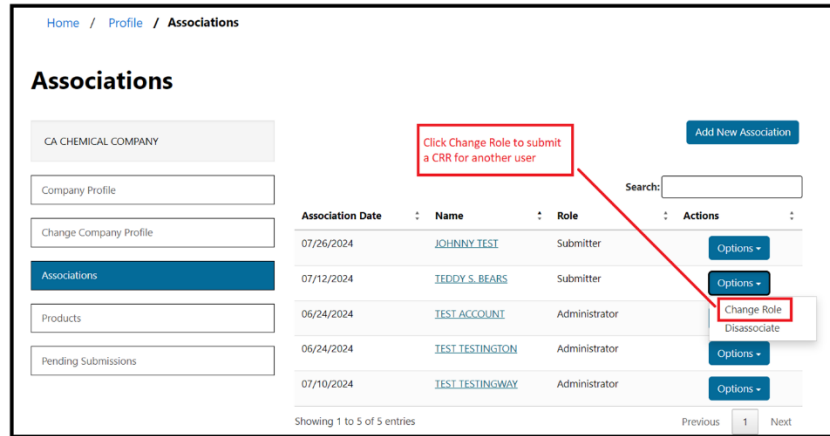
Figure 3.81: New Company Association – Success



3.4.5.2 Change Role of External User

Company Administrators can change the role of another user by clicking Change Role within the Options dropdown list.

Figure 3.82: Change Role of External User



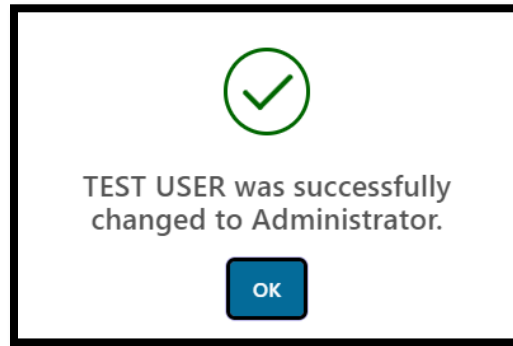
Company Administrators will be presented with a screen where the role can be selected for the user.

Figure 3.83: Change Role – Initial View



Once the Company Administrator clicks Submit, a pop-up will appear stating that the role change was successful. The user's role is immediately updated, and they will receive a notification via email.

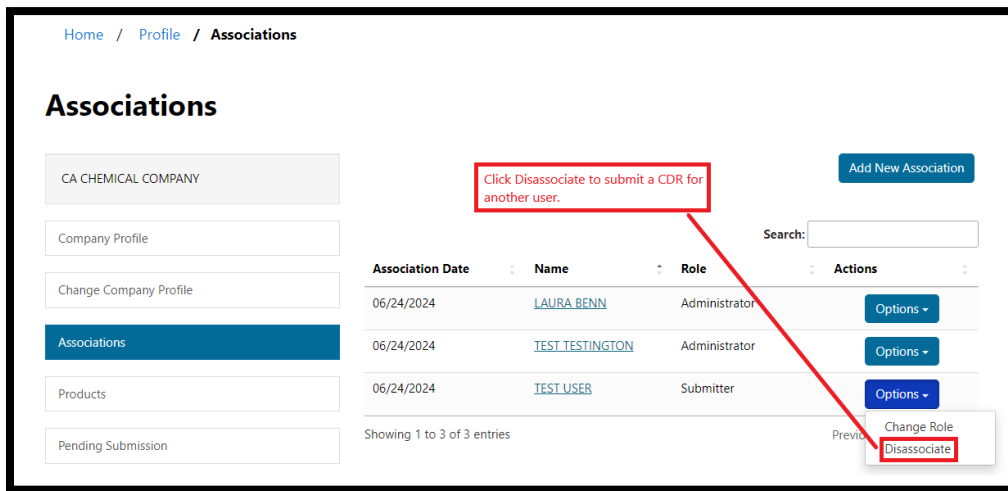
Figure 3.84: Change Role – Success



3.4.5.3 Disassociate External User

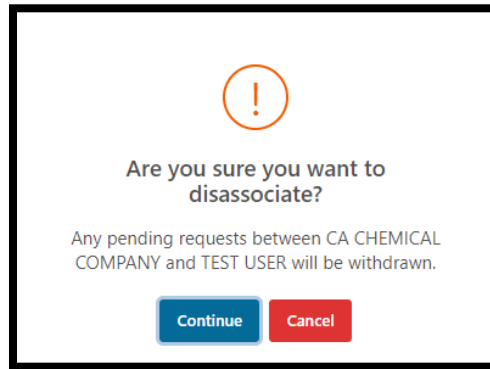
Company Administrators can disassociate another user by clicking Disassociate within the Options dropdown list.

Figure 3.85: Disassociate External User



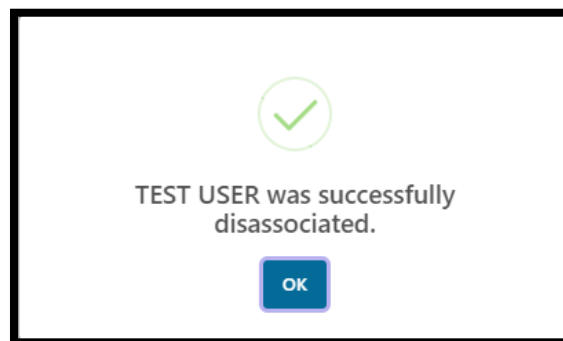
Company Administrators will receive a warning pop-up message to confirm the user being disassociated from the company.

Figure 3.86: Disassociate – Warning



Once the Company Administrator clicks Yes, a pop-up will appear stating that the disassociation was successful. The user's association is immediately updated for the company, and they will receive a notification via email of the disassociation. The Company Administrator is responsible for changing the contact for any of the disassociated user's pending submissions.

Figure 3.87: Disassociate – Success



3.4.6 Products

Users can view the active products for the selected company. The Products grid displays:

- First Registration Date
- Product Name
- Registration Number
- Actions
 - Cancel

Figure 3.88: Company Profile – Products screen

Products

PORTAL TEST COMPANY

Company Profile

Change Company Profile

Associations

Products

Pending Submissions

License

Note: Select Generate License to create a PDF license listing all active products. The license will take a few minutes to generate and will replace the previously generated license (if applicable).

[Generate License](#)

Document Name	Document Size
CompanyLicense_2024_08_08.pdf	146 KB

Active Products

Search:

Registration Date	Product Name	Registration Number	Actions
06/11/2024	TEST PRODUCT 1	123456-85-AA	Cancel
02/27/2023	TEST PRODUCT 2	123456-618-AA	Cancel
06/04/2024	TEST PRODUCT 3	123456-296-AA	Cancel
06/27/2024	TEST PRODUCT 4	123456-789-AA	Cancel
06/27/2024	TEST PRODUCT 5	123456-7-AA	Cancel

Showing 1 to 5 of 5 entries

Previous **1** Next

3.4.6.1 Generate License

Users can generate a current license for the company from the Products page. The user will click the Generate License button, and a pop-up message will appear to indicate that processing time will vary depending on the number of products. All company users may continue working in CalPEST while the license is generating. Once generated, the license will be available to all users associated with the company through the hyperlinked filename beneath the Generate License button. Clicking the hyperlinked filename will download the company license as a PDF.

Figure 3.89: Generate License

License

Note: Select Generate License to create a PDF license listing all active products. The license will take a few minutes to generate and will replace the previously generated license (if applicable).

Click Generate License to create the product license report

Generate License

Once generated, the license is available via hyperlink

Document Name	Document Size
CompanyLicense_2024_08_08.pdf	146 KB

Figure 3.90: Generate License – Warning


!

License generation time may vary depending on the number of products.

All company users may continue working in CalPEST and can access the license on the products page once it is complete.

OK

Figure 3.91: Generate License – Report



State of California
 Department of Pesticide Regulation
 Certificate of Registration for Pesticides

NON TRANSFERABLE

Generation Date: **08/08/2024**
 Expiration Date: **12/31/2024**

123456 | PORTAL TEST COMPANY

is authorized to manufacture, deliver, or sell in California the products listed below. Registration is not an endorsement of approval by the Department of Pesticide Regulation of any product or any claim made for it. No reference may be made to the Department of Pesticide Regulation in labeling or advertisements. Registration may be canceled after hearing at any time for just cause. The composition of each product or device and the label on it must be the same as those submitted by the registrant. Only pesticides and devices with market labels accepted by the Director may be sold in California. Master labels, which are not accepted by the Director for distribution, cannot be used on pesticides sold in California.

A CERTIFICATE OF REGISTRATION FOR PESTICIDES IS NOT TRANSFERABLE. IF THERE IS A CHANGE IN BUSINESS OWNERSHIP, A NEW APPLICATION AND FEE(S) ARE NECESSARY.

CONDITIONAL REGISTRATION

Registration Number	Product Name	Issue Date	Compliance Date
123456-618-AA	TEST PRODUCT 2	02/27/2023	

Total Products Conditionally Registered: 1

FULL REGISTRATION

Registration Number	Product Name	Issue Date
123456-7-AA	TEST LMN	06/27/2024
123456-789-AA	TEST PRODUCT 4	06/27/2024
123456-85-AA	TEST PRODUCT 1	06/11/2024
123456-296-AA	TEST PRODUCT 3	06/04/2024

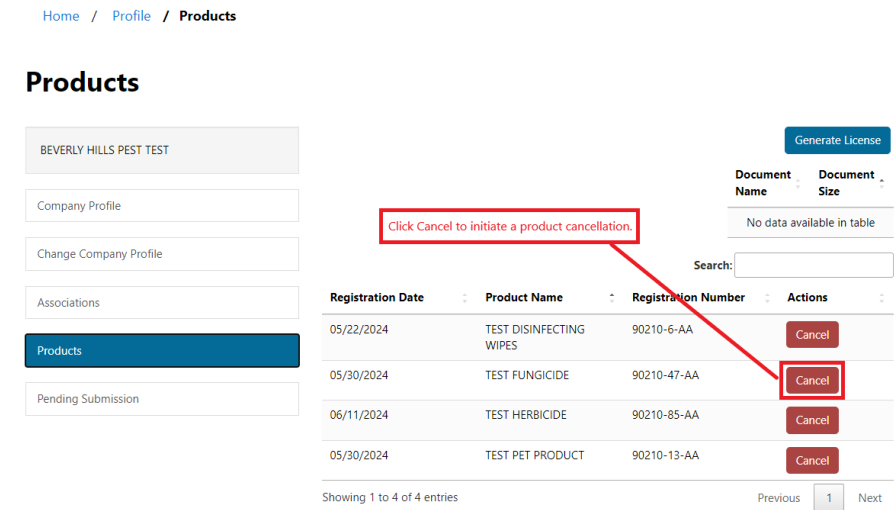
Total Products Fully Registered: 4

Total Products Registered: 5

3.4.6.2 Cancel a Product

Company Administrators can click Cancel from the Products grid to voluntarily cancel a product. Note: Company Submitters will see a Cancel button, but pressing the button will result in an error message stating that only Company Administrators may cancel a product. Any pending submissions for the product must be withdrawn before the product may be cancelled.

Figure 3.92: Cancel a Product



A popup is displayed indicating the name of the product to be cancelled and an important disclaimer regarding product cancellation. The acknowledgement checkbox must be completed to enable the Continue button.

Figure 3.93: Cancel a Product – Warning

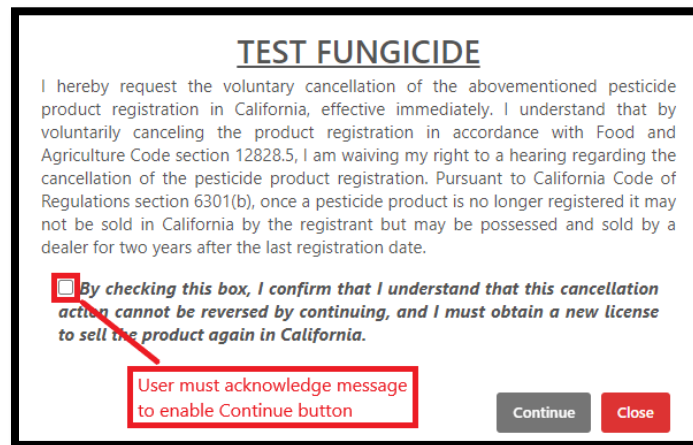
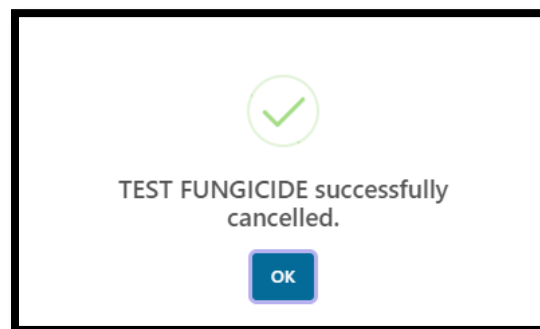


Figure 3.94: Cancel a Product – Success



3.5 Submissions

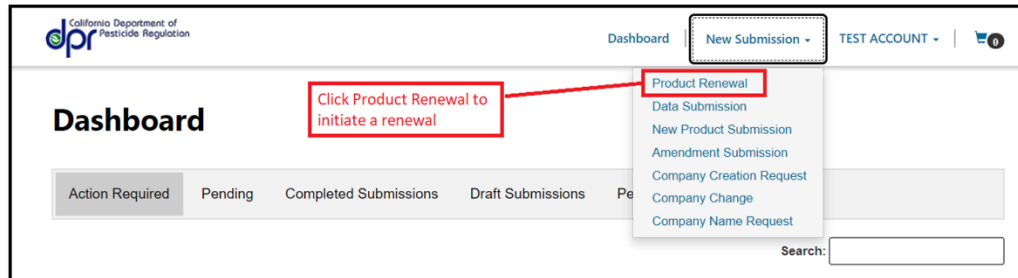
A User can generate the following submissions within CalPEST:

- Product Renewals
- Data Submissions (DAT)
- New Product Registrations (PRO)
- Amendments (AME)
- Company Changes (PRO)

3.5.1 Product Renewals

Users will have the ability to submit a Product Renewal Submission for a company they are associated with. Users will access this by selecting Product Renewal from the New Submission dropdown.

Figure 3.95: Initiate a Product Renewal



A wizard provides the user with a 3-step process to complete the product renewal:

- Products
- Details: Section displays for Conditional Products if selected for renewal
- Summary

3.5.1.1 Products

The Product Renewal Details screen is where the user will:

- Select a Company: Displays companies the user is currently associated with.
- Select Renewal Year: Displays years that are eligible for renewal
- Select Products: Displays a listing of all products that are eligible for renewal based on the Company and Year selected

- **Pro Tip:** To select all products for renewal, the user can click the All Products checkbox at the top of the products grid.

Once the products for renewal have been selected, the user will click Continue to proceed.

Figure 3.96: Product Renewal – Products Initial view

Product Renewal - Products

Renewals for the next calendar year are available October 1.
Note: Progress will not be saved until the submission is added to the cart.

1 Products
2 Details
3 Summary

* = Required

Company *

Select a Company
▼

Year *

Select a Year
▼

Products *

Continue

Figure 3.97: Product Renewal – Products Displayed

Product Renewal - Products

Renewals for the next calendar year are available October 1.
Note: Progress will not be saved until the submission is added to the cart.

1 Products
2 Details
3 Summary

* = Required

Company *

123456 | PORTAL TEST COMPANY
▼

Year *

2025
▼

Products *

Select	Registration Number	Product Name	Status
<input checked="" type="checkbox"/> All Products			
<input checked="" type="checkbox"/>	123456-85-AA	TEST PRODUCT 1	Active
<input checked="" type="checkbox"/>	123456-296-AA	TEST PRODUCT 3	Active
<input checked="" type="checkbox"/>	123456-618-AA	TEST PRODUCT 2	Active
<input checked="" type="checkbox"/>	123456-789-AA	TEST PRODUCT 4	Active

Continue

The portal interfaces with U.S. EPA’s Active Pesticide Product Registration Informational Listing (APPRIL) and will check the federal registration status for each federally registered product when the user selects Continue. If the user encounters any issues with renewing a product, they can email CalPEST@cdpr.ca.gov for assistance.

3.5.1.2 Details

The Details page displays if a product selected for renewal is a conditionally registered product. If a conditionally registered product is not selected for renewal, the system will skip this step. The user will enter the date they intended to submit information to satisfy the conditions. This feature in CalPEST meets the need for registrants to submit an annual conditional progress report.

Figure 3.98: Product Renewal – Details

Product Renewal - Details

Renewals for the next calendar year are available October 1.
Note: Progress will not be saved until the submission is added to the cart.

1 Products ✓ 2 Details 3 Summary

* = Required

Conditional Products
 The following products are conditionally registered. Enter the date information will be submitted to satisfy conditions.

Registration Number	Product Name	Status	Date *
123456-618-AA	TEST PRODUCT 2	Active	mm/dd/yyyy <input type="text"/>

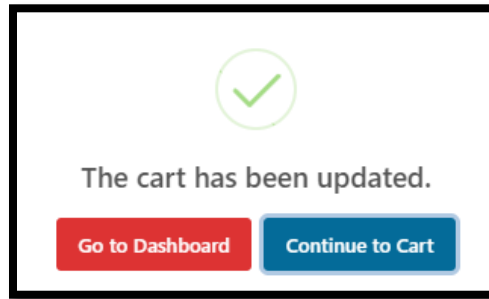
Previous **Continue**

Once the renewal details are entered, the user will click the Continue button to proceed to the Summary screen.

3.5.1.3 Summary

The Summary screen will be displayed to the user as a final confirmation of the data submitted for the Product Renewal. If any updates are needed, the user can click the Previous button to be routed back to the Products or Details screen. The user must acknowledge the Terms and Conditions statement by clicking the checkbox to enable the Add to Cart button. Once the Add to Cart button is clicked, the user will be presented with a pop-up message indicating that the cart has been updated.

Figure 3.99: Product Renewal – Go to Dashboard / Continue to Cart



The user can choose to:

- Go to Dashboard – Navigates user back to the Dashboard
- Continue to Cart – Navigates user to the Payment Cart screen

3.5.1.4 Payment Cart

The Payment Cart will display selected products within a grid containing:

- Company
- Item
- Product Name
- Registration Number
- Fee
- Fee Adjustment
- Subtotal
- Remove

Validations will be performed to ensure that a product does not have any pending renewals in the system. A yellow, on-screen banner alerts the user to the amount of time a product or submission will remain in the cart. After this period, the Payment Cart is automatically emptied.

Figure 3.100: Product Renewal – Payment Cart

Home / Payment Cart

Cart

Items in the cart will be removed after 2 business days.

Search:

Company	Item	Product Name	Registration Number	Fee	Fee Adjustment	Subtotal	Actions
PORTAL TEST COMPANY	PRODUCT RENEWAL	TEST PRODUCT	123456-1654-AA	\$1525.00	\$0.00	\$1525.00	Remove
PORTAL TEST COMPANY	PRODUCT RENEWAL	TEST PRODUCT ABC	123456-50019-AA	\$1525.00	\$0.00	\$1525.00	Remove
PORTAL TEST COMPANY	PRODUCT RENEWAL	TEST PRODUCT DEF	123456-1715-AA	\$1525.00	\$0.00	\$1525.00	Remove
PORTAL TEST COMPANY	PRODUCT RENEWAL	TEST PRODUCT GHI	123456-1-AA	\$1525.00	\$0.00	\$1525.00	Remove

Total: \$6100.00

Showing 1 to 4 of 4 entries

Payment Method

--Please Select--

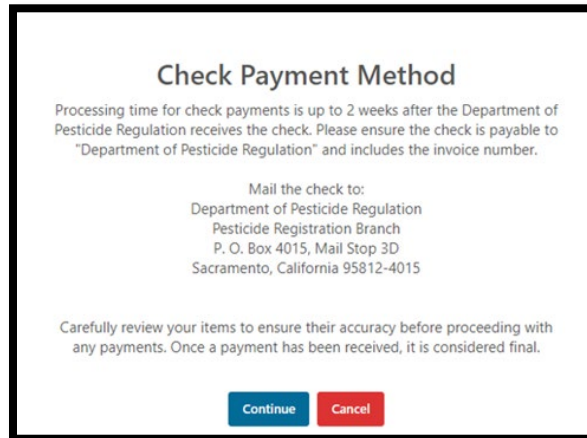
[Submit](#)

The user selects a Payment Method for the renewal(s):

- Check
 - 2-week processing time
- Credit Card
 - User routed to Credit Card payment site
 - Immediate processing of payment with confirmation
- Electronic Funds Transfer
 - User routed to the EFT payment site
 - 2–3-day processing time

The user selects the Submit button and is presented with a pop-up that will have details associated with the selected payment method.

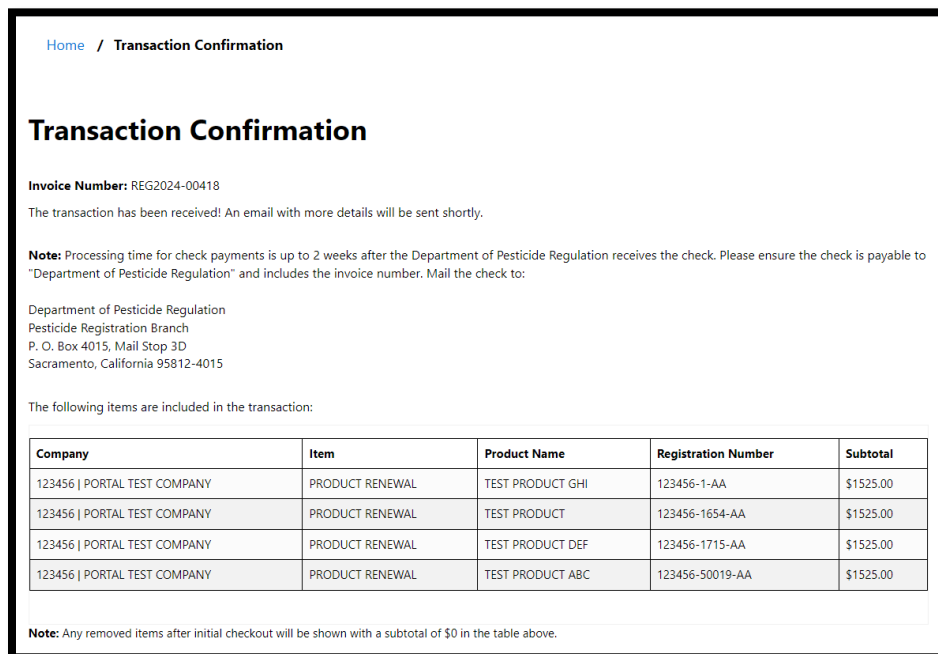
Figure 3.101: Product Renewal – Payment Cart - Confirmation



Clicking the Continue button will take the user to a screen confirming the transaction. This screen will show details related to the selected payment method, along with a grid listing the products included in the renewal. The user will also see the invoice number displayed. Note: the renewal will not be processed and finalized until DPR receives and processes the payment.

- ! Pro Tip: If paying by check, the user should enter the Invoice Number in the memo field of the check before mailing payment to the Department.

Figure 3.102: Product Renewal – Transaction Confirmation



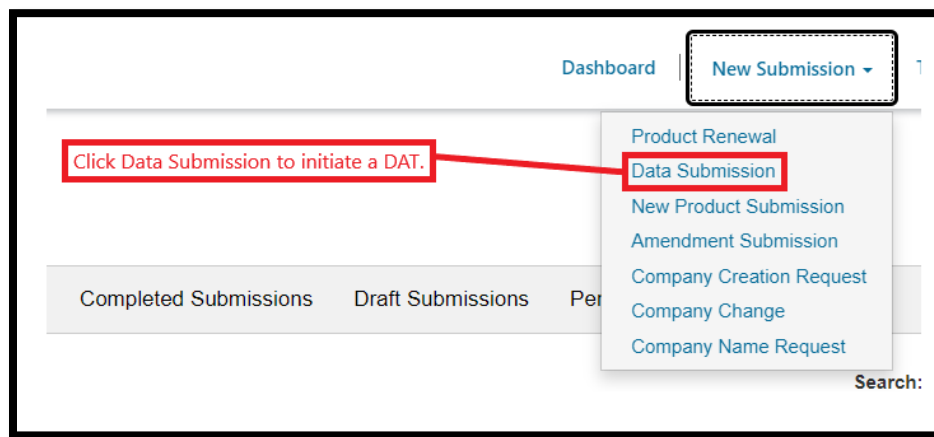
An email containing the invoice details is also sent to the user who submitted the renewal.

3.5.2 Data Submissions (DAT)

Users will have the ability to submit a Data Submission (DAT) for a company they are associated with. Users can access this by selecting Data Submission from the New Submission dropdown. Functionality to allow a user to submit data in support of another company's product is anticipated for the second implementation. Users may email CalPEST@cdpr.ca.gov for assistance before this feature is live.

! Pro Tip: To submit data, labels, or other documents for a submission currently in review with DPR, the user can upload the files directly to the relevant submission from the record in their Pending Submissions dashboard.

Figure 3.103: Initiate a DAT



A wizard provides the user with a 3-step process to submit the DAT:

- Details
- Documents
- Summary

3.5.2.1 Details

A yellow, onscreen banner alerts the user that the DAT form is for submission of standalone data only. The Details screen is where the user will:

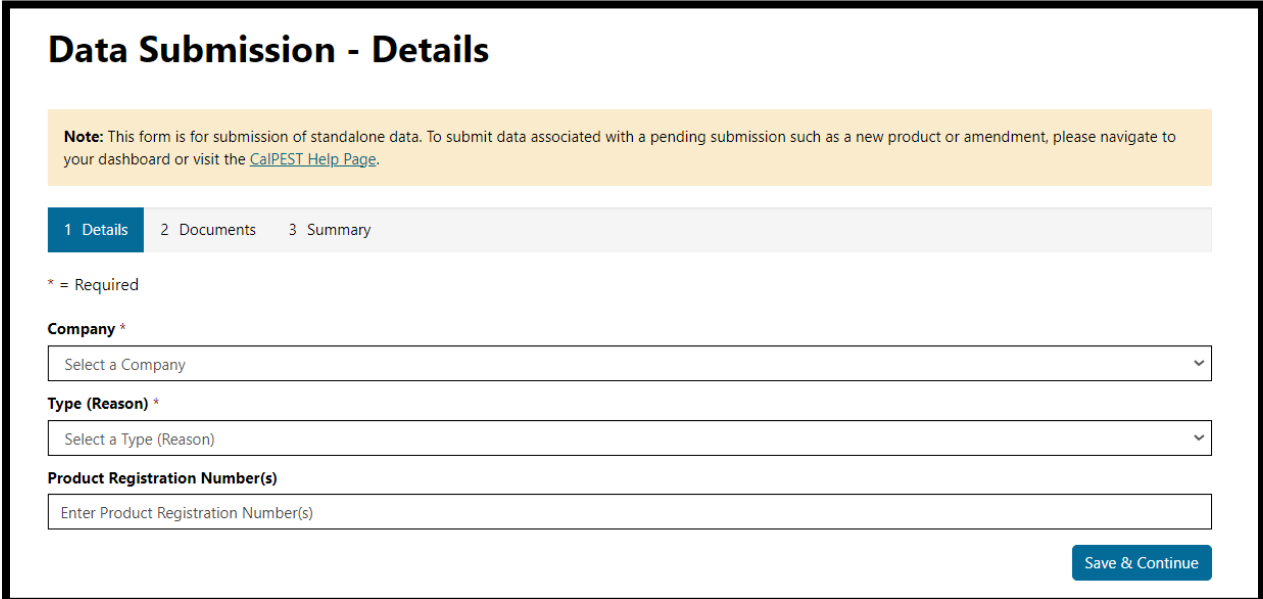
- Select a Company
 - Displays companies the user is currently associated with.
- Select Submission Type
 - Displays listing of eligible submission types
- Enter Product Registration Number(s)
 - Open text field where the user can enter the registration number associated with the data submission

In addition to the information above, the following fields are conditionally displayed based on the DAT Type:

- Adverse Effect (Incident Report)
 - Incident Report Type
- Product Conditions
 - Registration Number | Product Name
 - Displays a drop-down menu of conditionally registered products

Once all required fields have been completed, the user will click Save and Continue to proceed to the Documents screen.

Figure 3.104: DAT – Initial View



Data Submission - Details

Note: This form is for submission of standalone data. To submit data associated with a pending submission such as a new product or amendment, please navigate to your dashboard or visit the [CalPEST Help Page](#).

1 Details 2 Documents 3 Summary

* = Required

Company *

Select a Company

Type (Reason) *

Select a Type (Reason)

Product Registration Number(s)

Enter Product Registration Number(s)

Save & Continue

3.5.2.2 Documents

Users will be able to upload documents with the DAT. The application will allow for the following file types to be uploaded:

- .pdf
- .xls
- .xlsx
- .csv

Clicking + Select Documents will allow the user to select files to be uploaded with the DAT.

- ! Pro Tip: If CSF or PFI files will be submitted by a third party, email CalPEST@cdpr.ca.gov for a secure upload link.

Figure 3.105: DAT – Documents – Initial View

Data Submission - Documents

Note: This form is for submission of standalone data. To submit data associated with a pending submission such as a new product or amendment, please navigate to your dashboard or visit the [CalPEST Help Page](#).

1 Details ✓ 2 Documents 3 Summary

* = Required

+ Select Documents Click + Select Documents to begin the document upload process for the DAT Upload

Uploaded Documents *

Search documents...

Document Name	Document Category	Document Size	Action
No matching records found			

Previous Save & Continue

The selected documents will display within a grid:

- Document Name
- Document Category
- Document Size
- Action
 - Remove
- Status

Users will need to select a Document Category from the dropdown list for each selected document. Once this is completed, the user can click Upload.

Figure 3.106: DAT – Documents – Documents Selected

Data Submission - Documents

Note: This form is for submission of standalone data. To submit data associated with a pending submission such as a new product or amendment, please navigate to your dashboard or visit the [CalPEST Help Page](#).

1 Details ✓ 2 Documents 3 Summary

* = Required

+ Select Documents
Upload

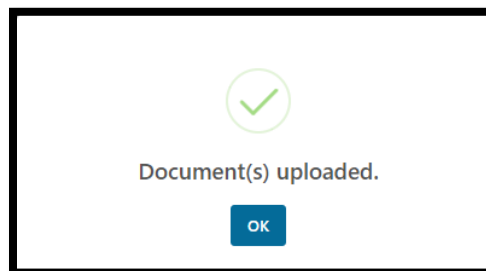
Selected Documents for Upload

0.00%

Document Name	Document Category *	Document Size	Action	Status
COVER LETTER.pdf	Cover Letter	30.1 KB	Remove	0.00%
Scientific Study.pdf	Scientific Study	31.42 KB	Remove	0.00%

The user will see a progress indicator while the documents are being uploaded. Once the process is complete, a pop-up message will be displayed with a success message.

Figure 3.107: DAT – Documents Uploaded



The user will see the final screen where the documents have been uploaded to the submission. There is still the option to remove a document from the uploaded document grid when needed. The user will click Save and Continue to proceed to the Summary screen.

Figure 3.108: DAT – Documents – Documents Uploaded

Data Submission - Documents

Note: This form is for submission of standalone data. To submit data associated with a pending submission such as a new product or amendment, please navigate to your dashboard or visit the [CalPEST Help Page](#).

1 Details ✓

2 Documents

3 Summary

* = Required

+ Select Documents
Upload

Uploaded Documents *

Document Name	Document Category	Document Size	Action
Scientific Study.pdf	Scientific Study	31.42 KB	<input type="button" value="Remove"/>
COVER LETTER.pdf	Cover Letter	30.1 KB	<input type="button" value="Remove"/>

Previous
Save & Continue

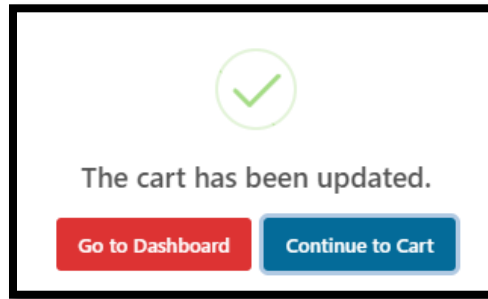
3.5.2.3 Summary

The Summary screen will be displayed to the user as a final confirmation of the data submitted for the DAT. If any updates or edits are needed, the user can click the Previous button to be routed back to the Documents or Details screens. The user will see a summary of:

- Company selected
- Submission Type
- Product Registration Number(s)
- Incident Report Type (conditionally displayed if DAT Type is Adverse Effect)
- Documents

The user must acknowledge the Terms and Conditions statement by clicking the checkbox to enable the Add to Cart button. Once the Add to Cart button is clicked, the user will be presented with a pop-up message indicating that the cart has been updated.

Figure 3.109: DAT – Go to Dashboard / Continue to Cart



The user can choose to:

- Go to Dashboard – Navigates user back to Dashboard
- Continue to Cart – Navigates user to the Payment Cart screen

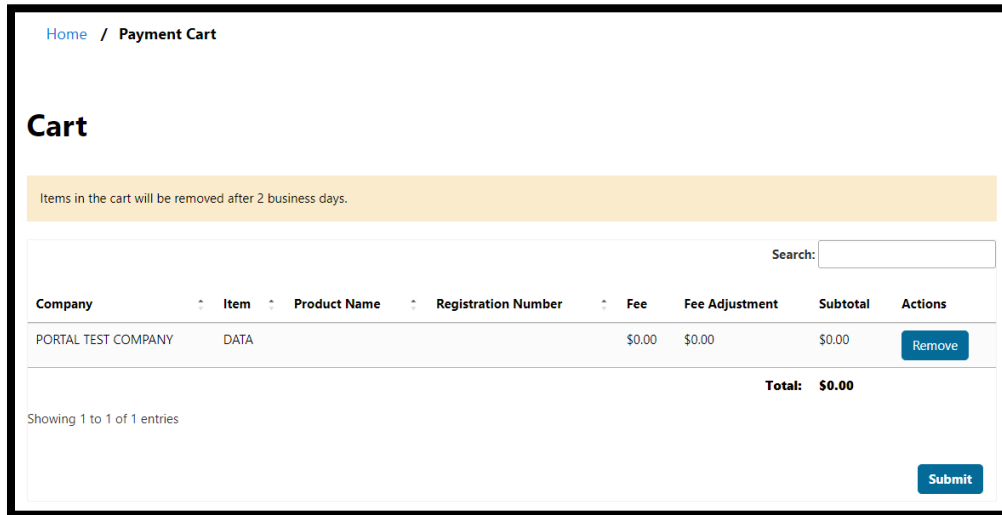
3.5.2.4 Payment Cart

The Payment Cart will display selected products within a grid containing:

- Company
- Item
- Product Name
- Registration Number
- Fee
- Fee Adjustment
- Subtotal
- Remove

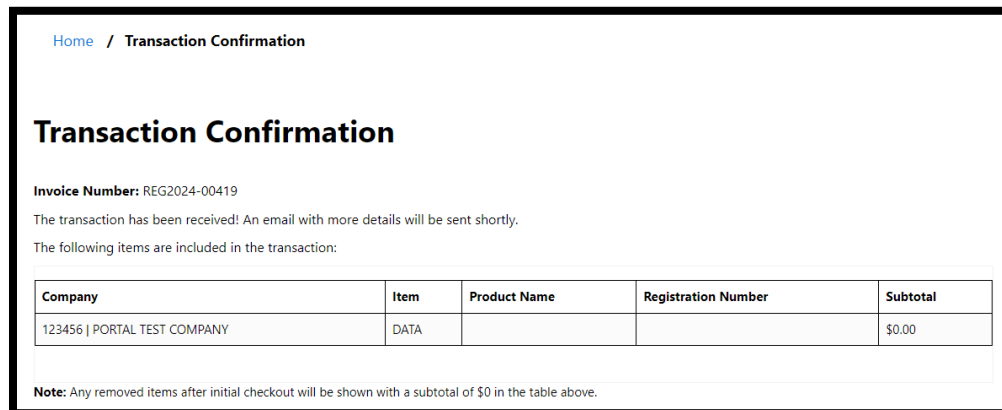
There are no fees currently associated with the DAT submission. A yellow, on-screen banner alerts the user to the amount of time a product or submission will remain in the cart. The user will click Submit to complete the DAT submission process.

Figure 3.110: DAT – Payment Cart



Clicking the Submit button will take the user to a screen confirming the transaction. This screen will show details related to the DAT submission.

Figure 3.111: DAT – Transaction Confirmation

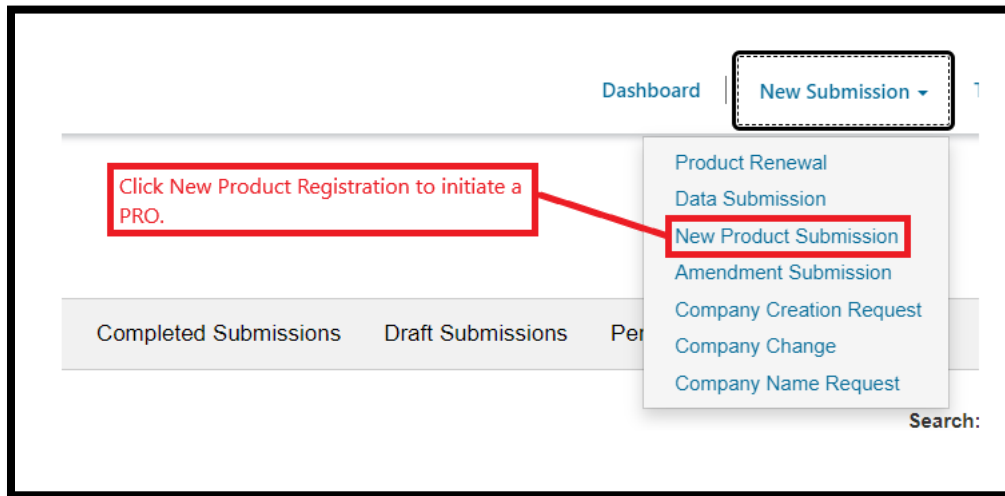


An email containing the invoice details is also sent to the user who submitted the DAT.

3.5.3 New Product Registrations (PRO)

Users will have the ability to submit a New Product Registration (PRO) for a company they are associated with. Users will access this by selecting New Product Submission from the New Submission dropdown.

Figure 3.112: Initiate a PRO



A wizard provides the user with a 3-step process to submit the PRO:

- Details
- Documents
- Summary

3.5.3.1 Details

The PRO screen has been created for the user to submit information for the new product. Users will provide the following details:

- Company
- General Information
 - Registration Type
 - Special Registration Type (check at least one box)
 - Federal Concurrent Type
- Product Information
 - Product Name (exactly as shown on the label)
 - Product Type (check at least one box)
 - Signal Word (as shown on label)
 - Container Information
- Pesticide Classification Information
 - Pesticide Classification (check all that apply)

- Pesticide Category (check all that apply)
- Pesticide Use (check all that apply)
- Pesticide Formulation Information
 - Pesticide Formulation Classification
 - Pesticide Formulation
- Pesticide Application Method Information
 - Intended Application Method (check all that apply)
 - Pesticide Application Method (check all that apply)

In addition to the information above, the following fields are conditionally displayed based on the Registration Type:

- Section 3 Regular Registration
 - U.S. EPA Registration Number
- CA-Only Device
 - U.S. EPA Establishment Number
 - Device Approvals (check at least one box)
 - Approval Number

Once all required fields have been completed, the user will click Save and Continue to proceed to the Documents screen.

Figure 3.113: PRO – Initial View – General Information

New Product Submission - Details

1 Details
2 Documents
3 Summary

* = Required

Company *

Select a Company ▼

General Information

Registration Type *

If the product does not require federal registration but requires registration with California (i.e., CA-ONLY), DPR will assign the product a CA Registration Number.

Select a Registration Type ▼

Special Registration Type (check at least one box) *

NEW ACTIVE INGREDIENT

MAJOR NEW USE

SPECIAL LOCAL NEED (SECTION 24C) FULL PRODUCT

INTERIM REGISTRATION

NOT APPLICABLE

Federal Concurrent Type *

Select a Federal Concurrent Type ▼

Figure 3.114: PRO – Initial View – Product Information

Product Information

Product Name (exactly as shown on the label) *

This must be EXACTLY the same as the brand name on the product labeling and the same brand name registered by U.S. EPA (if applicable). The product brand name cannot be the same as another product with a different formulation. Do not include symbols used in place of words that are part of the brand name (e.g., @, TM, ®, etc.).

Product Type (check at least one box) *

ADDITIONAL BRAND NAME MASTER LABEL SUPPLEMENTAL DISTRIBUTOR
 NOT APPLICABLE

Signal Word (as shown on label) *

Container Information *

Describe the actual container(s) that hold the formulated product. Specify the container type, composition, and size that will be sold and distributed in California. For example, Container Type: bottle; Composition: fluorinated high-density polyethylene (HDPE); Sizes: 1, 2, and 5 gallons.

Figure 3.115: PRO – Initial View – Pesticide Classification Information

Pesticide Classification Information

Pesticide Classification (check all that apply) *

BIOCHEMICAL CHEMICAL MICROBIAL
 OTHER

Pesticide Category (check all that apply) *

<input type="checkbox"/> ADJUVANT	<input type="checkbox"/> ALGAECIDE/ALGISTAT	<input type="checkbox"/> ANTIFOULANT
<input type="checkbox"/> ANTIMICROBIAL	<input type="checkbox"/> ATTRACTANT	<input type="checkbox"/> AVICIDE
<input type="checkbox"/> BACTERICIDE/BACTERIOSTAT	<input type="checkbox"/> DEFOAMER	<input type="checkbox"/> DEFOLIANT
<input type="checkbox"/> DESICCANT	<input type="checkbox"/> DISINFECTANT/SANITIZER	<input type="checkbox"/> FERTILIZER
<input type="checkbox"/> FUNGICIDE/FUNGISTAT	<input type="checkbox"/> HERBICIDE	<input type="checkbox"/> INSECT GROWTH REGULATOR
<input type="checkbox"/> INSECTICIDE	<input type="checkbox"/> MITICIDE/ACARICIDE	<input type="checkbox"/> MOLLUSCICIDE
<input type="checkbox"/> NEMATOCIDE	<input type="checkbox"/> PENETRANT	<input type="checkbox"/> PLANT GROWTH REGULATOR
<input type="checkbox"/> PISCICIDE	<input type="checkbox"/> PROTECTANT	<input type="checkbox"/> REPELLENT
<input type="checkbox"/> RODENTICIDE	<input type="checkbox"/> SLIMICIDE	<input type="checkbox"/> VERTEBRATE CONTROL
<input type="checkbox"/> VIRUCIDE	<input type="checkbox"/> WATER MODIFIER	<input type="checkbox"/> OTHER

Pesticide Use (check all that apply) *

<input type="checkbox"/> AGRICULTURAL	<input type="checkbox"/> HOUSEHOLD/HOME GARDEN	<input type="checkbox"/> INSTITUTIONAL
<input type="checkbox"/> INDUSTRIAL END USE	<input type="checkbox"/> MANUFACTURING ONLY	<input type="checkbox"/> REFORMULATION ONLY
<input type="checkbox"/> STRUCTURAL	<input type="checkbox"/> OTHER	

Figure 3.116: PRO – Initial View – Pesticide Formulation and Application Method Information

Pesticide Formulation Information

Pesticide Formulation Classification *

Select a Pesticide Formulation Classification ▼

Pesticide Formulation *

Select a Pesticide Formulation ▼

Pesticide Application Method Information

Intended Application Method (check all that apply) *

<input type="checkbox"/> AERIAL EQUIPMENT	<input type="checkbox"/> DIRECTLY TO FOLIAGE	<input type="checkbox"/> DIRECTLY TO SOIL
<input type="checkbox"/> DIRECTLY TO WATER	<input type="checkbox"/> GROUND/SURFACE EQUIPMENT	<input type="checkbox"/> INDOORS
<input type="checkbox"/> OUTDOORS	<input type="checkbox"/> OTHER	<input type="checkbox"/> NOT APPLICABLE

Pesticide Application Method (check all that apply) *

<input type="checkbox"/> ADDITIVE	<input type="checkbox"/> AIRBLAST	<input type="checkbox"/> ANT/WASP/RODENT MOUND
<input type="checkbox"/> ATTACH	<input type="checkbox"/> BAIT	<input type="checkbox"/> BROADCAST
<input type="checkbox"/> CHEMIGATION WITH OR WITHOUT RESTRICTION	<input type="checkbox"/> CHEMIGATION NOT ALLOWED	<input type="checkbox"/> COATING (SEED TREATMENT)
<input type="checkbox"/> COATING/PAINT (NON-SEED TREATMENT)	<input type="checkbox"/> CRACK/CREVICE	<input type="checkbox"/> DRIP
<input type="checkbox"/> DRENCH (NON-TURF)	<input type="checkbox"/> DRENCH (TURF)	<input type="checkbox"/> DUST
<input type="checkbox"/> EVAPORATING SOLID	<input type="checkbox"/> FILTRATION SYSTEM	<input type="checkbox"/> FOG
<input type="checkbox"/> FUMIGATION	<input type="checkbox"/> INJECTION (OTHER THAN SOIL)	<input type="checkbox"/> SMOKE
<input type="checkbox"/> SPRAY	<input type="checkbox"/> TOPICAL/SURFACE	<input type="checkbox"/> TRAP/DEVICE
<input type="checkbox"/> WASH/SOAK	<input type="checkbox"/> WICK APPLICATOR	<input type="checkbox"/> WIPE
<input type="checkbox"/> OTHER	<input type="checkbox"/> NOT APPLICABLE	

Save & Continue

3.5.3.2 Documents

Users will be able to upload documents with the PRO. The application will allow for the following file types to be uploaded:

- .pdf
- .xls
- .xlsx
- .csv

Clicking + Select Documents will allow the user to select files to be uploaded with the PRO.

Figure 3.117: PRO – Documents – Initial View

New Product Submission - Documents

1 Details ✓ 2 Documents 3 Summary

* = Required

+ Select Documents Upload

Uploaded Documents *

Search documents...

Document Name	Document Category	Document Size	Action
No matching records found			

Previous Save & Continue

The selected documents will display within a grid:

- Document Name
- Document Category
- Document Size
- Action
 - Remove
- Status

Users will need to select a Document Category from the dropdown list for each selected document. Once this is completed, the user can click Upload.

Figure 3.118: PRO – Documents – Documents Selected

New Product Submission - Documents

1 Details ✓ 2 Documents 3 Summary

* = Required

+ Select Documents Upload

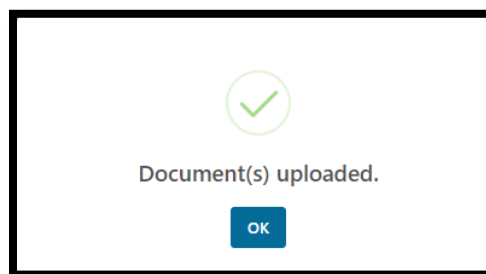
Selected Documents for Upload

0.00%

Document Name	Document Category *	Document Size	Action	Status
CONFIDENTIAL PFI.pdf	Product Formulation Information (PFI)	33.82 KB	Remove	0.00%
COVER LETTER.pdf	Cover Letter	30.1 KB	Remove	0.00%
Product Label.pdf	Label - Standard	80.7 KB	Remove	0.00%
Scientific Study.pdf	Scientific Study	31.42 KB	Remove	0.00%

The user will see a progress indicator while the documents are being uploaded. Once the process is complete, a pop-up message will be displayed with a success message.

Figure 3.119: PRO – Documents Uploaded



The user will see the final screen where the documents have been uploaded to the submission. There is still the option to remove a document from the uploaded document grid when needed. The user will click Save and Continue to proceed to the Summary screen.

Figure 3.120: PRO – Documents – Documents Uploaded

New Product Submission - Documents

1 Details ✓
2 Documents
3 Summary

* = Required

+ Select Documents
Upload

Uploaded Documents *

Document Name	Document Category	Document Size	Action
Scientific Study.pdf	Scientific Study	31.42 KB	<input type="button" value="Remove"/>
CONFIDENTIAL PFI.pdf	Product Formulation Information (PFI)	33.82 KB	<input type="button" value="Remove"/>
COVER LETTER.pdf	Cover Letter	30.1 KB	<input type="button" value="Remove"/>
Product Label.pdf	Label - Standard	80.7 KB	<input type="button" value="Remove"/>

Previous
Save & Continue

3.5.3.3 Summary

The Summary screen will be displayed to the user as a final confirmation of the data submitted for the PRO. If any updates or edits are needed, the user can click the Previous button to be routed back to the Documents or Details screens. The user will see a summary of:

- Company
- Registration Type
- Special Registration Type
- Federal Concurrent Type
- Product Name
- Product Type
- Signal Word
- Container Information
- Pesticide Classification
- Pesticide Category
- Pesticide Use
- Pesticide Formulation Classification
- Pesticide Formulation

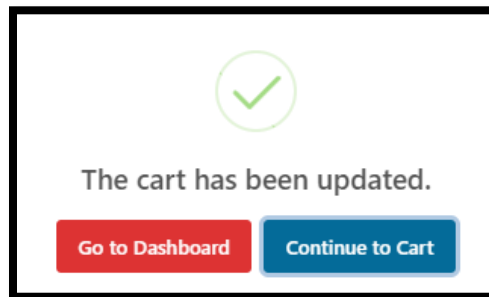
- Intended Application Method
- Pesticide Application Method
- Any uploaded documents
- Terms and Conditions (DPR and CalPEST, linked)
 - Must be agreed to by user to add PRO to Payment Cart

In addition to the information above, the following fields are conditionally displayed based on the Registration Type:

- Section 3 Regular Registration
 - U.S. EPA Registration Number
- CA-Only Device
 - U.S. EPA Establishment Number
 - Device Approvals (check at least one box)
 - Approval Number

The user must acknowledge the Terms and Conditions statement by clicking the checkbox to enable the Add to Cart button. Once the Add to Cart button is clicked, the user will be presented with a pop-up message indicating that the cart has been updated.

Figure 3.121: PRO – Go to Dashboard / Continue to Cart



The user can choose to:

- Go to Dashboard – Navigates user back to Dashboard
- Continue to Cart – Navigates user to the Payment Cart screen

3.5.3.4 Payment Cart

The Payment Cart will display selected products within a grid containing:

- Company
- Item
- Product Name
- Registration Number
- Fee
- Fee Adjustment

- Subtotal
- Remove

A yellow, on-screen banner alerts the user to the amount of time a product or submission will remain in the cart. After this period, the Payment Cart is automatically emptied.

Figure 3.122: PRO – Payment Cart

Home / Payment Cart

Cart

Items in the cart will be removed after 2 business days.

Search:

Company	Item	Product Name	Registration Number	Fee	Fee Adjustment	Subtotal	Actions
PORTAL TEST COMPANY	NEW PRODUCT	TEST PEST AWAY		\$1150.00	\$0.00	\$1150.00	Remove

Total: **\$1150.00**

Showing 1 to 1 of 1 entries

Payment Method

--Please Select--

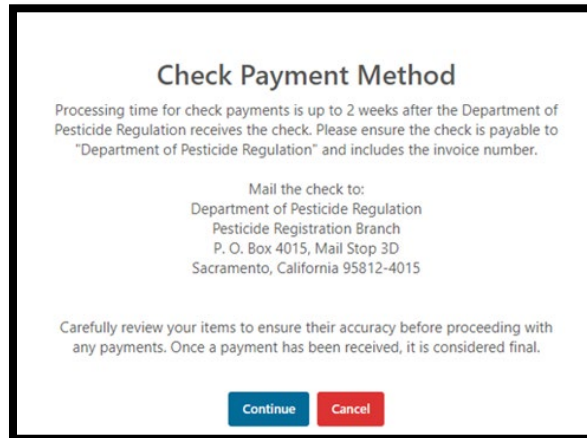
[Submit](#)

The user selects a Payment Method for the PRO:

- Check
 - 2-week processing time
- Credit Card
 - User routed to Credit Card payment site
 - Immediate processing of payment with confirmation
- Electronic Funds Transfer
 - User routed to the EFT payment site
 - 2–3-day processing time

The user selects the Submit button and is presented with a pop-up that will have details associated with the selected payment method.

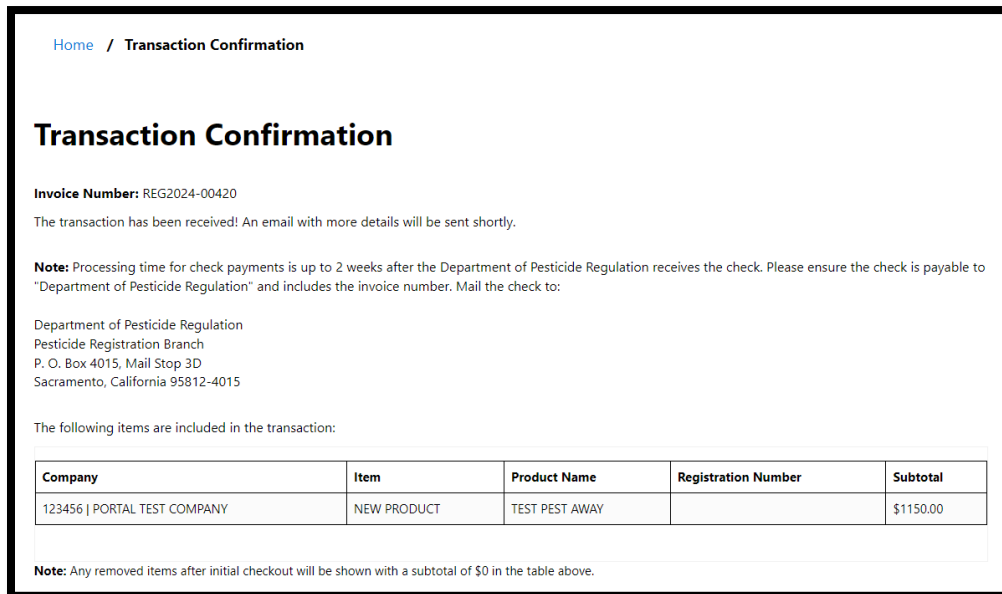
Figure 3.123: PRO – Payment Cart – Confirmation



Clicking the Continue button will take the user to a screen confirming the transaction. This screen will show details related to the selected payment method, along with a grid listing the submissions included in the transaction. The user will also see the invoice number displayed.

- ! Pro Tip: If paying by check, the user should enter the Invoice Number in the memo field of the check before mailing the payment to the Department.

Figure 3.124: PRO – Transaction Confirmation

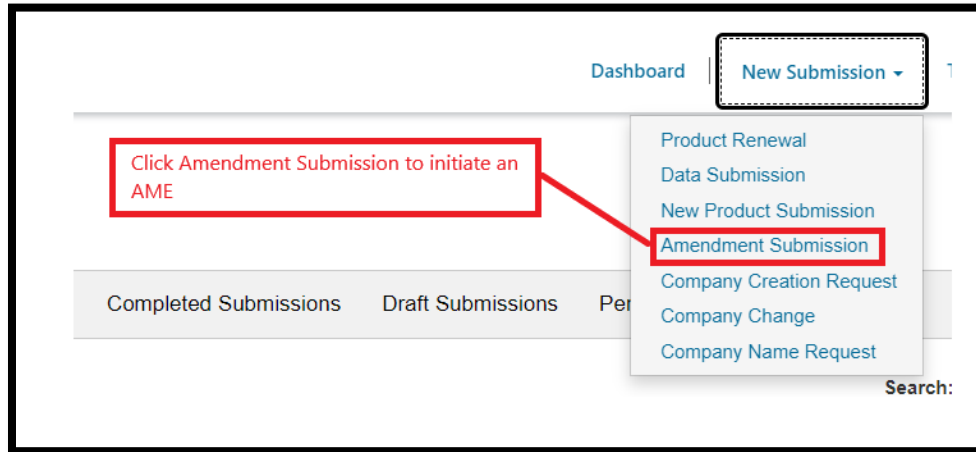


An email containing the invoice details is also sent to the user who submitted the PRO.

3.5.4 Amendments

Users will have the ability to submit an Amendment or Notification for a company they are associated with. Users will access this by selecting Amendment Submission from the New Submission dropdown.

Figure 3.125: Initiate an AME



A wizard provides the user with a 3-step process to submit the AME:

- Details
- Documents
- Summary

3.5.4.1 Details

The AME screen has been created for the user to submit information for the amendment. Users will provide the following details:

- Company
- Registration Number | Product Name
- Amendment Type (Amendment or Notification)
 - Selection will determine the Amendment Sub Types displayed
- Amendment Sub Type (check all that apply)
- Federal Concurrent Type

Figure 3.126: AME – Initial View

Amendment Submission - Details

1 Details
2 Documents
3 Summary

*** = Required**

Company *

Select a Company

Registration Number | Product Name *

Select a Product

Amendment Type *

Select a Amendment Type

Federal Concurrent Type *

Select a Federal Concurrent Type

Save & Continue

Figure 3.127: AME – Details Entered – Amendment

Amendment Submission - Details

1 Details
2 Documents
3 Summary

*** = Required**

Company *

123456 | PORTAL TEST COMPANY

Registration Number | Product Name *

123456-85-AA | TEST PRODUCT 1

Amendment Type *

AMENDMENT

Amendment Sub Type (check all that apply) *

<input type="checkbox"/> ADD ALTERNATE FORMULATION OR REVISE FORMULATION <input type="checkbox"/> ADD CROP/SITE/USE (NON-MAJOR) <input type="checkbox"/> ADD SYMBOLS AND/OR GRAPHICS <input type="checkbox"/> COMPLIANCE WITH U.S. EPA <input type="checkbox"/> REFORMAT LABEL <input type="checkbox"/> REMOVE PEST <input type="checkbox"/> REVISE LABEL ELEMENTS (FIFRA-RELATED) <input type="checkbox"/> REVISE PRECAUTIONARY OR HAZARD STATEMENTS <input type="checkbox"/> UPDATE COMPANY INFORMATION	<input type="checkbox"/> ADD CROP/SITE/USE (MAJOR) <input type="checkbox"/> ADD PEST <input type="checkbox"/> ADD/REVISE BILINGUAL LANGUAGE <input type="checkbox"/> CORRECT TYPOGRAPHICAL OR GRAMMATICAL ERRORS <input type="checkbox"/> REMOVE CROP/SITE/USE <input type="checkbox"/> REMOVE REDUNDANT STATEMENTS <input type="checkbox"/> REVISE SIGNAL WORD <input type="checkbox"/> REVISE SIZE/CONTENT OF PACKAGING <input type="checkbox"/> OTHER
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Figure 3.128: AME – Details Entered - Notification

Amendment Submission - Details

1 Details
2 Documents
3 Summary

* = Required

Company *

123456 | PORTAL TEST COMPANY ▼

Registration Number | Product Name *

123456-85-AA | TEST PRODUCT 1 ▼

Amendment Type *

NOTIFICATION ▼

Amendment Sub Type (check all that apply) *

<input type="checkbox"/> ADD INDOOR SITES (NON-FOOD) FOR CERTAIN ANTIMICROBIAL PRODUCTS <input type="checkbox"/> ADD U.S. EPA PR NOTICE SPECIFIED WORDING <input type="checkbox"/> REFORMAT LABEL <input type="checkbox"/> REMOVE PEST <input type="checkbox"/> REVISE LABEL ELEMENTS (NON-FIFRA RELATED) <input type="checkbox"/> REVISE STATED NOMINAL CONCENTRATION OF INERT INGREDIENT	<input type="checkbox"/> ADD SYMBOLS AND/OR GRAPHICS <input type="checkbox"/> CORRECT TYPOGRAPHICAL OR GRAMMATICAL ERRORS <input type="checkbox"/> REMOVE CROP/SITE/USE <input type="checkbox"/> REMOVE REDUNDANT STATEMENTS <input type="checkbox"/> REVISE SIZE/CONTENT OF CHILD-RESISTANT PACKAGING <input type="checkbox"/> REVISE WARRANTY STATEMENT
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

3.5.4.2 Documents

Users will be able to upload documents with the AME. The application will allow for the following file types to be uploaded:

- .pdf
- .xls
- .xlsx
- .csv

Clicking + Select Documents will allow the user to select files to be uploaded with the AME.

Figure 3.129: AME – Documents – Initial View

Amendment Submission - Documents

1 Details ✓ 2 Documents 3 Summary

* = Required

+ Select Documents Upload

Uploaded Documents *

Search documents...

Document Name	Document Category	Document Size	Action
No matching records found			

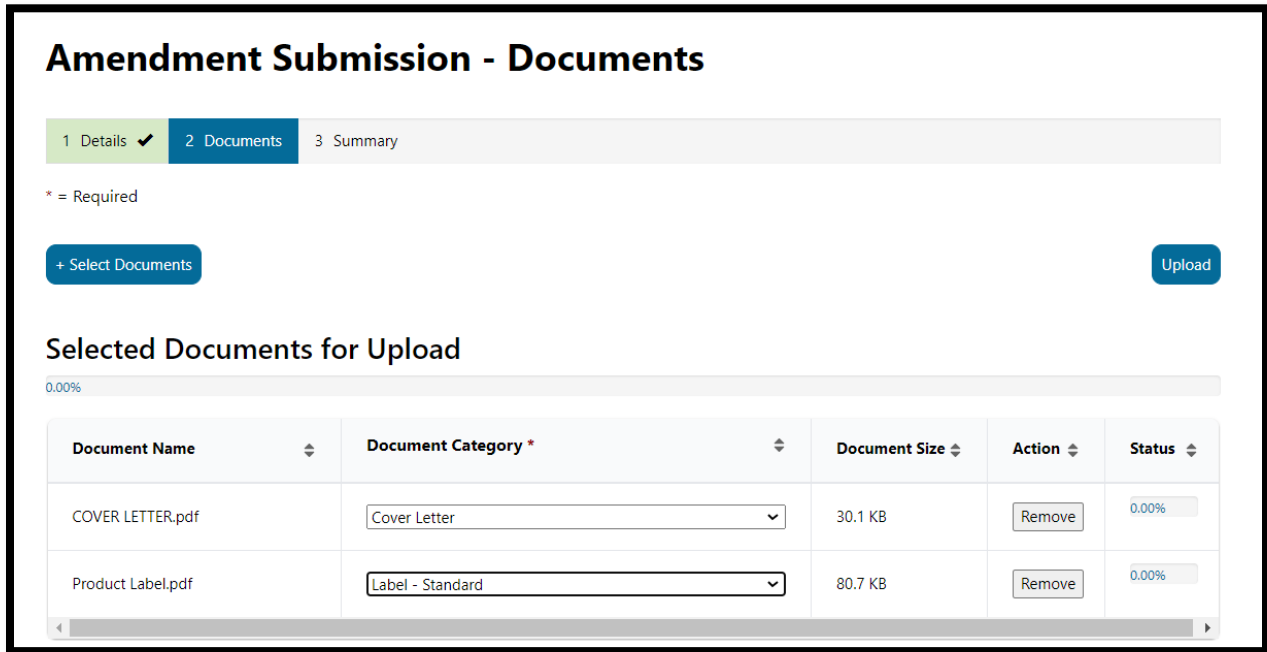
Previous Save & Continue

The selected documents will display within a grid:

- Document Name
- Document Category
- Document Size
- Action
 - Remove
- Status

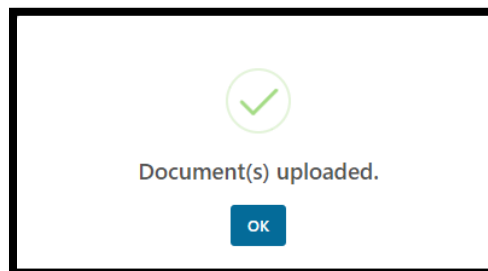
Users will need to select a Document Category from the dropdown list for each selected document. Once this is completed, the user can click Upload.

Figure 3.130: AME – Documents – Documents Selected



The user will see a progress indicator while the documents are being uploaded. Once the process is complete, a pop-up message will be displayed with a success message.

Figure 3.131: AME – Documents Uploaded



The user will see the final screen where the documents have been uploaded to the submission. There is still the option to remove a document from the uploaded document grid when needed. The user will click Save and Continue to proceed to the Summary screen.

Figure 3.132: AME – Documents – Documents Uploaded

Amendment Submission - Documents

1 Details ✓
2 Documents
3 Summary

* = Required

+ Select Documents
Upload

Uploaded Documents *

Document Name	Document Category	Document Size	Action
COVER LETTER.pdf	Cover Letter	30.1 KB	<input type="button" value="Remove"/>
Product Label.pdf	Label - Standard	80.7 KB	<input type="button" value="Remove"/>

Previous
Save & Continue

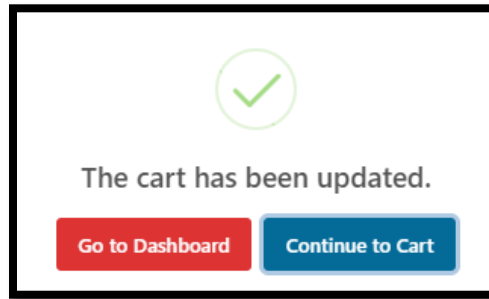
3.5.4.3 Summary

The Summary screen will be displayed to the user as a final confirmation of the data submitted for the AME. If any updates or edits are needed, the user can click the Previous button to be routed back to the Documents or Details screens. The user will see a summary of:

- Company
- Registration Number | Product Name
- Amendment Type
- Amendment Sub Type
- Federal Concurrent Type
- Any uploaded documents
- Terms and Conditions (DPR and CalPEST, linked)
 - Must be agreed to by user to add AME to Payment Cart

The user must acknowledge the Terms and Conditions statement by clicking the checkbox to enable the Add to Cart button. Once the Add to Cart button is clicked, the user will be presented with a pop-up message indicating that the cart has been updated.

Figure 3.133: AME – Go to Dashboard / Continue to Cart



The user can choose to:

- Go to Dashboard – Navigates user back to Dashboard
- Continue to Cart – Navigates user to the Payment Cart screen

3.5.4.4 Payment Cart

The Payment Cart will display selected products within a grid containing:

- Company
- Item
- Product Name
- Registration Number
- Fee
- Fee Adjustment
- Subtotal
- Remove

A yellow, on-screen banner alerts the user to the amount of time a product or submission will remain in the cart. After this period, the Payment Cart is automatically emptied.

Figure 3.134: AME – Payment Cart

Home / Payment Cart

Cart

Items in the cart will be removed after 2 business days.

Search:

Company	Item	Product Name	Registration Number	Fee	Fee Adjustment	Subtotal	Actions
PORTAL TEST COMPANY	AMEND	TEST PRODUCT DEF	123456-1715-AA	\$50.00	\$0.00	\$50.00	Remove

Total: \$50.00

Showing 1 to 1 of 1 entries

Payment Method

--Please Select--

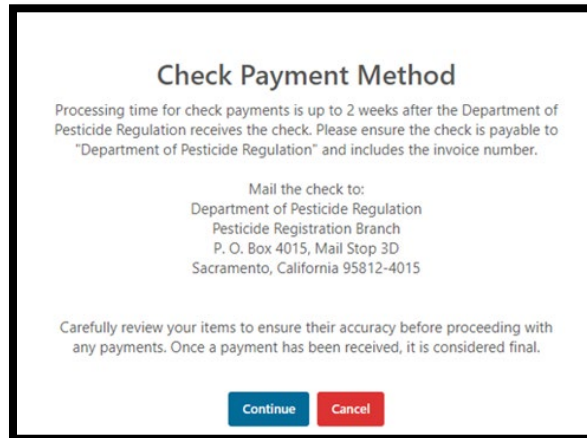
[Submit](#)

The user selects a Payment Method for the AME:

- Check
 - 2-week processing time
- Credit Card
 - User routed to Credit Card payment site
 - Immediate processing of payment with confirmation
- Electronic Funds Transfer
 - User routed to the EFT payment site
 - 2–3-day processing time

The user selects the Submit button and is presented with a pop-up that will have details associated with the selected payment method.

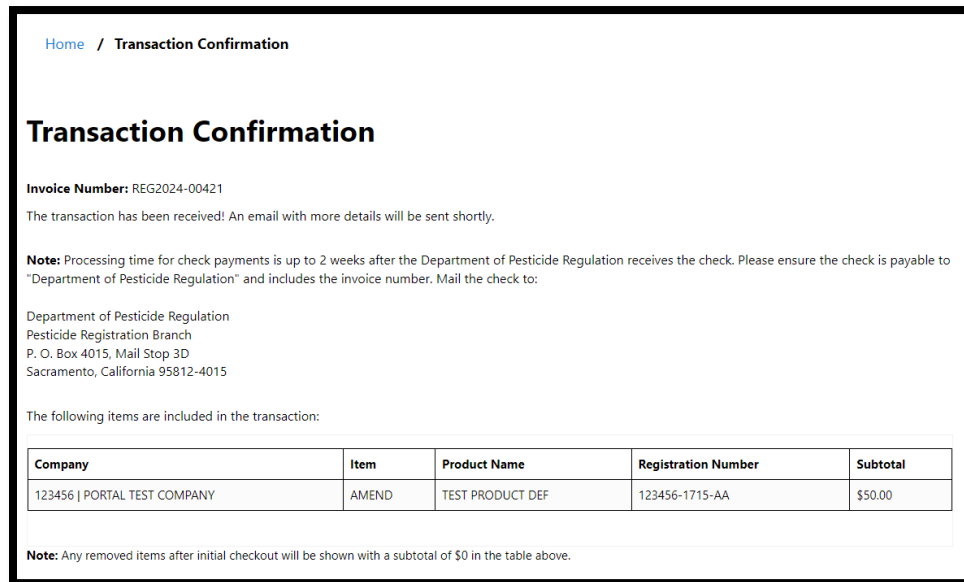
Figure 3.135: AME – Payment Cart – Confirmation



Clicking the Continue button will take the user to a screen confirming the transaction. This screen will show details related to the selected payment method, along with a grid listing the submissions included in the transaction. The user will also see the invoice number displayed.

- ! Pro Tip: If paying by check, the user should enter the Invoice Number in the memo field of the check before mailing payment to the Department.

Figure 3.136: AME – Transaction Confirmation

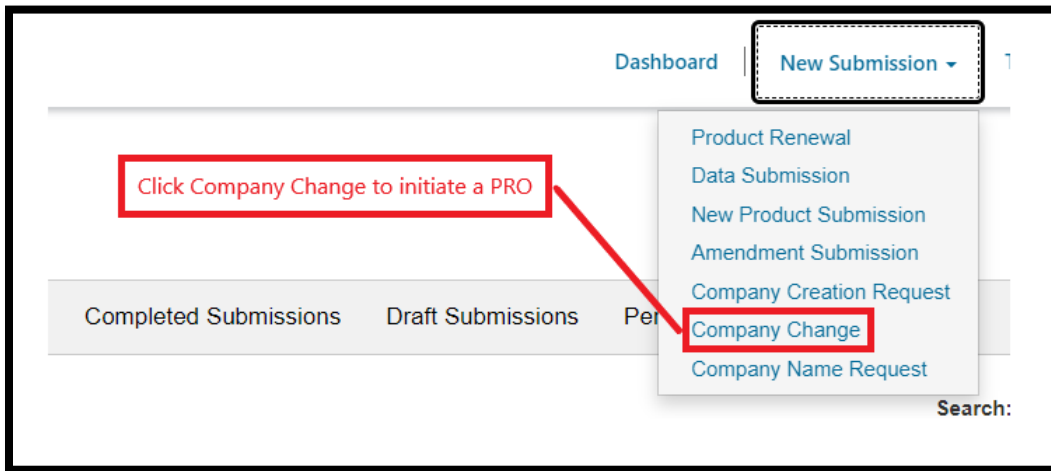


An email containing the invoice details is also sent to the user who submitted the AME.

3.5.5 Company Changes (Ownership or Product Transfer)

Users will have the ability to submit a Company Change for a company they are associated with. Users will access this by selecting Company Change from the New Submission dropdown. This will be submitted as another type of PRO.

Figure 3.137: Initiate a Company Change PRO



A wizard provides the user with a 3-step process to submit the PRO:

- Details
- Documents
- Summary

3.5.5.1 Details

The Company Change screen has been created for the user to submit information for the new product that is being obtained from another (previous) company. Users will provide the following details:

- Company
- Company Change Type (Company Ownership or Product Transfer)
- Previous Product Information
 - Previous Company
 - Previous Product
 - Does the sale or transfer of the product include ownership of the associated scientific studies?
- New Product Information
 - Product Name (exactly as shown on the label)
 - U.S. EPA Registration Number

Figure 3.138: Company Change PRO – Initial View

Company Change - Details

1 Details
2 Documents
3 Summary

This form is for a company ownership change or an individual product transfer.
 If the company ownership change involves multiple products, this form must be submitted for each product.
 Each product will show as a new product in the cart and invoice.
 If you have a company name change, submit a Company Name Request.

* = Required

Company *

Select a Company

Company Change Type *

Select a Company Change Type

Previous Product Information

Previous Company *

Select a Previous Company

Previous Product *

Select a Product

Does the sale or transfer of the product include ownership of the associated scientific studies? *

NO

New Product Information

Product Name (exactly as shown on the label) *

[Empty text input]

U.S. EPA Registration Number *

Select a Manufacturing Company

-

Enter product number

-

Select a Supplemental Distributor

Save & Continue

3.5.5.2 Documents

Users will be able to upload documents with the Company Change PRO. The application will allow for the following file types to be uploaded:

- .pdf
- .xls
- .xlsx
- .csv

Clicking + Select Documents will allow the user to select files to be uploaded with the Company Change PRO.

Figure 3.139: Company Change PRO – Documents – Initial View

Company Change - Documents

1 Details ✓ 2 Documents 3 Summary

* = Required

+ Select Documents Upload

Uploaded Documents *

Search documents...

Document Name	Document Category	Document Size	Action
No matching records found			

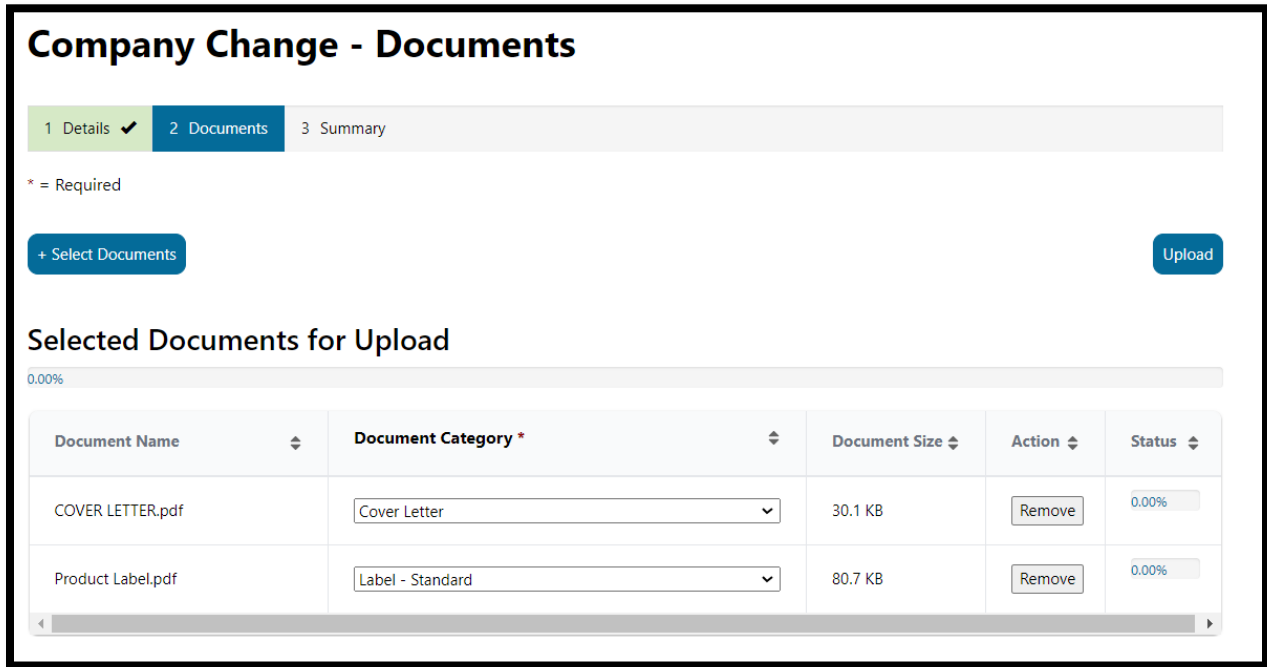
Previous Save & Continue

The selected documents will display within a grid:

- Document Name
- Document Category
- Document Size
- Action
 - Remove
- Status

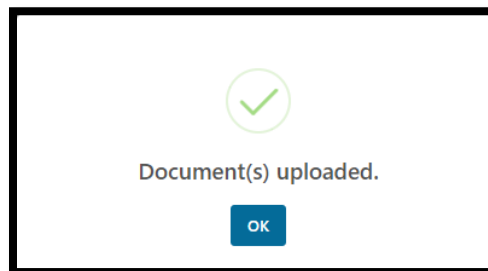
Users will need to select a Document Category from the dropdown list for each selected document. Once this is completed, the user can click Upload.

Figure 3.140: Company Change PRO – Documents – Documents Selected



The user will see a progress indicator while the documents are being uploaded. Once the process is complete, a pop-up message will be displayed with a success message.

Figure 3.141: Company Change PRO – Documents Uploaded



The user will see the final screen where the documents have been uploaded to the submission. There is still the option to remove a document from the uploaded document grid when needed. The user will click Save and Continue to progress to the Summary screen.

Figure 3.142: Company Change PRO – Documents Uploaded

Company Change - Documents

1 Details ✓
2 Documents
3 Summary

* = Required

+ Select Documents
Upload

Uploaded Documents *

Document Name	Document Category	Document Size	Action
Product_Label.pdf	Label - Standard	80.7 KB	<input type="button" value="Remove"/>
COVER LETTER.pdf	Cover Letter	30.1 KB	<input type="button" value="Remove"/>

Previous
Save & Continue

3.5.5.3 Summary

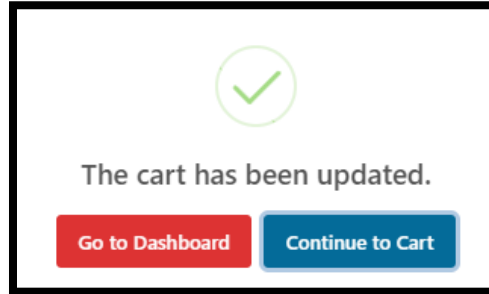
The Summary screen will be displayed to the user as a final confirmation of the data submitted for the Company Change PRO. If any updates or edits are needed, the user can click the Previous button to be routed back to the Documents or Details screens.

The user will see a summary of:

- Details
 - Company
 - Company Change Type
- Previous Product Information
 - Previous Company
 - Previous Product
 - Does the sale or transfer of the product include ownership of the associated scientific studies?
- New Product Information
 - Product Name
 - U.S. EPA Registration Number
- Any uploaded documents
- Terms and Conditions (DPR and CalPEST, linked)
 - Must be agreed to by user to add Company Change PRO to Payment Cart

The user must acknowledge the Terms and Conditions statement by clicking the checkbox to enable the Add to Cart button. Once the Add to Cart button is clicked, the user will be presented with a pop-up message indicating that the cart has been updated.

Figure 3.143: Company Change PRO – Go to Dashboard / Continue to Cart



The user can choose to:

- Go to Dashboard – Navigates user back to Dashboard
- Continue to Cart – Navigates user to the Payment Cart screen

3.5.5.4 Payment Cart

The Payment Cart will display selected products within a grid containing:

- Company
- Item
- Product Name
- Registration Number
- Fee
- Fee Adjustment
- Subtotal
- Remove

A yellow, on-screen banner alerts the user to the amount of time a product or submission will remain in the cart. After this period, the Payment Cart is automatically emptied.

Figure 3.144: Company Change PRO – Payment Cart

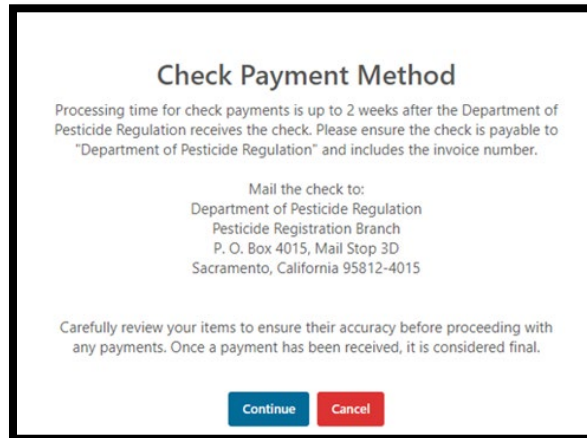
The screenshot shows a web interface for a payment cart. At the top, there is a breadcrumb trail: Home / Payment Cart. Below this is a heading 'Cart' and a yellow warning banner: 'Items in the cart will be removed after 2 business days.' A search bar is located to the right of the banner. The main content is a table with the following columns: Company, Item, Product Name, Registration Number, Fee, Fee Adjustment, Subtotal, and Actions. The table contains one row with the following data: BEVERLY HILLS PEST TEST, NEW PRODUCT, TEST PROD GHI2000, 90210-254, \$1150.00, \$0.00, \$1150.00, and a 'Remove' button. Below the table, it says 'Showing 1 to 1 of 1 entries' and 'Total: \$1150.00'. Underneath is a section titled 'Payment Method' with a dropdown menu currently set to '--Please Select--'. A 'Submit' button is located at the bottom right of the form.

The user selects a Payment Method for the Company Change PRO:

- Check
 - 2-week processing time
- Credit Card
 - User routed to Credit Card payment site
 - Immediate processing of payment with confirmation
- Electronic Funds Transfer
 - User routed to the EFT payment site
 - 2–3-day processing time

The user selects the Submit button and is presented with a pop-up that will have details associated with the selected payment method.

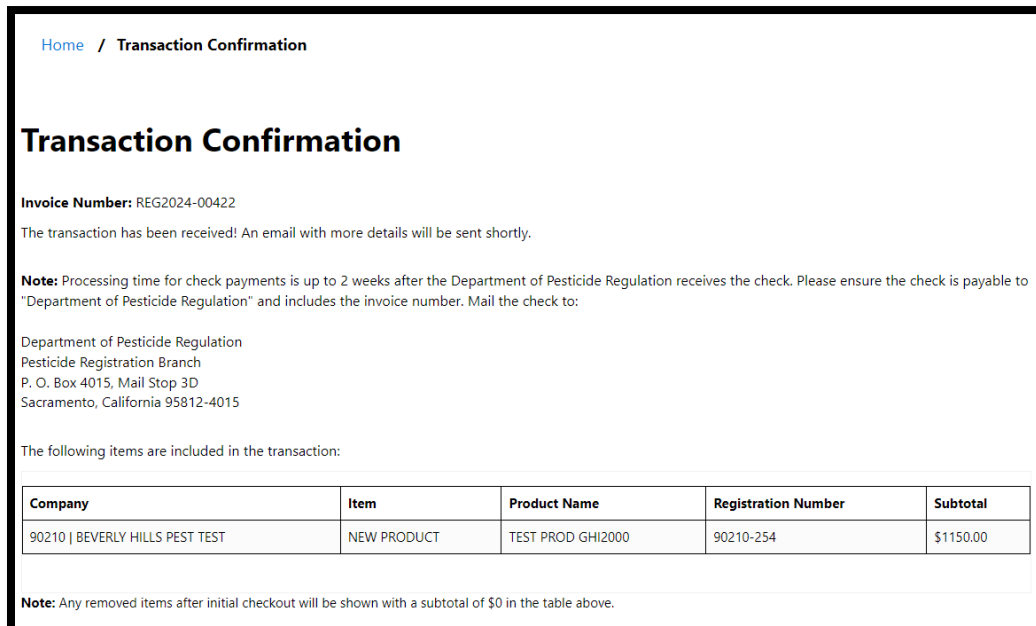
Figure 3.145: Company Change PRO – Payment Cart – Confirmation



Clicking the Continue button will take the user to a screen confirming the transaction. This screen will show details related to the selected payment method, along with a grid listing the submissions included in the transaction. The user will also see the invoice number displayed.

- ! Pro Tip: If paying by check, the user should enter the Invoice Number in the memo field of the check before mailing payment to the Department.

Figure 3.146: Company Change PRO – Transaction Confirmation



An email containing the invoice details is also sent to the user who submitted the Company Change PRO.

3.6 Dashboards

Dashboards have been created to provide users with a snapshot of details related to their account. The dashboards can be accessed via the associated tab in the dashboard navigation bar. The details for each dashboard are as follows:

- Action Required
 - Displays data for requests assigned to the Company Administrator for completion.
 - Displays data for submissions where user updates are needed.
- Pending
 - Displays data for any pending requests or submissions initiated by the user.
- Completed Submissions
 - Displays data for any completed requests or submissions initiated by the user.
- Draft Submissions
 - Displays data for any draft submissions initiated by the user.
- Pending Invoices
 - Displays data for any pending invoices related to items submitted by the user.

3.6.1 Action Required

The Action Required dashboard is the default dashboard displayed to the user upon logging into the application. This dashboard will show any pending requests associated with a company for which the user, with the Company Administrator role, also has an association. The Company Administrator can:

- Approve or Reject a CAR
- Approve or Reject a CRR

The dashboard will also display submissions where the user can:

- Agree to Conditions
- View Deficiencies
- Resubmit Returns

Figure 3.147: Action Required Dashboard

Dashboard

Action Required | Pending | Completed Submissions | Draft Submissions | Pending Invoices

Search:

Received Date	CALPESTID	Type	Company	Product Name	Registration Number	Status
06/25/2024	CAR-2400947	Administrator	123456 PORTAL TEST COMPANY			Pending
06/25/2024	CAR-2400946	Submitter	98765 CA CHEMICAL COMPANY			Pending
06/25/2024	AME-2400938	NOTIFICATION	123456 PORTAL TEST COMPANY	TEST PRODUCT DEF	123456-1715-AA	Returned

Showing 1 to 3 of 3 entries Previous **1** Next

3.6.1.1 Approve / Reject CAR

A user with a company administrator role will approve or reject any Company Association Requests from the dashboard. The documents tab will display any documents uploaded with the request.

Figure 3.148: CAR Details – Initial View – Documents

Home / CAR-2402142

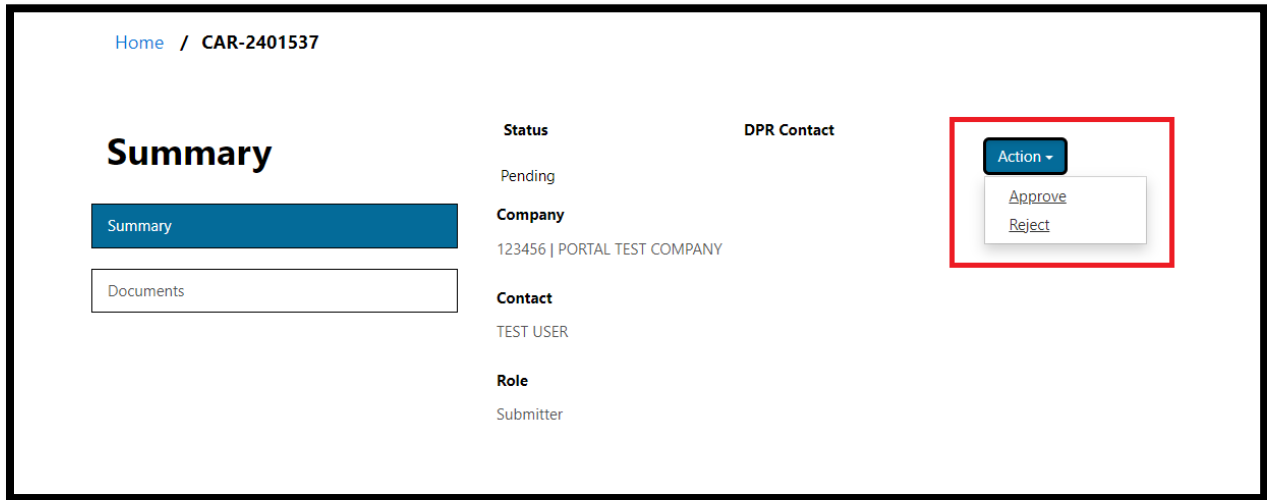
Documents

Summary

Documents

Status	DPR Contact	Action		
Pending		<input type="button" value="Action"/>		
Document Name	Document Category	Document Size		
Testing Document.docx	Authorization Letter	13KB		

Figure 3.149: CAR Details – Summary – Action



3.6.1.2 Approve / Reject CRR

A user with a company administrator role will approve or reject any Company Role Requests from the dashboard. The documents tab will display any documents uploaded with the request.

Figure 3.150: CRR Details – Initial View – Documents

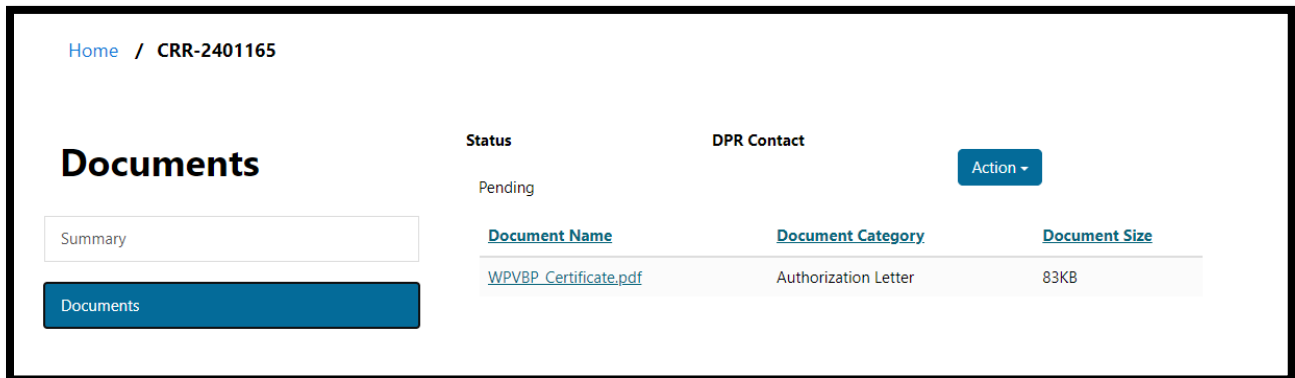
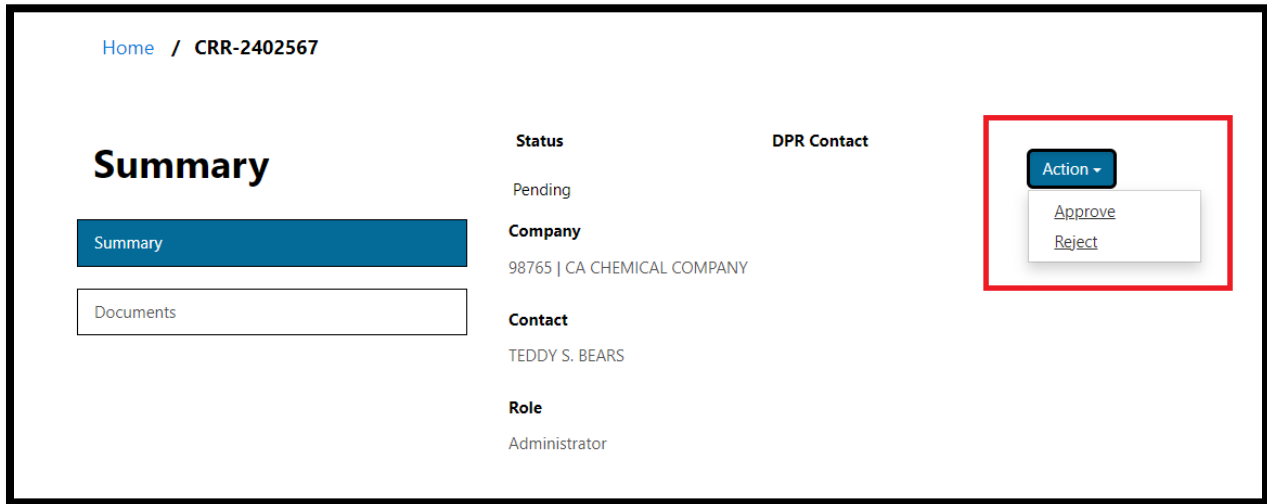


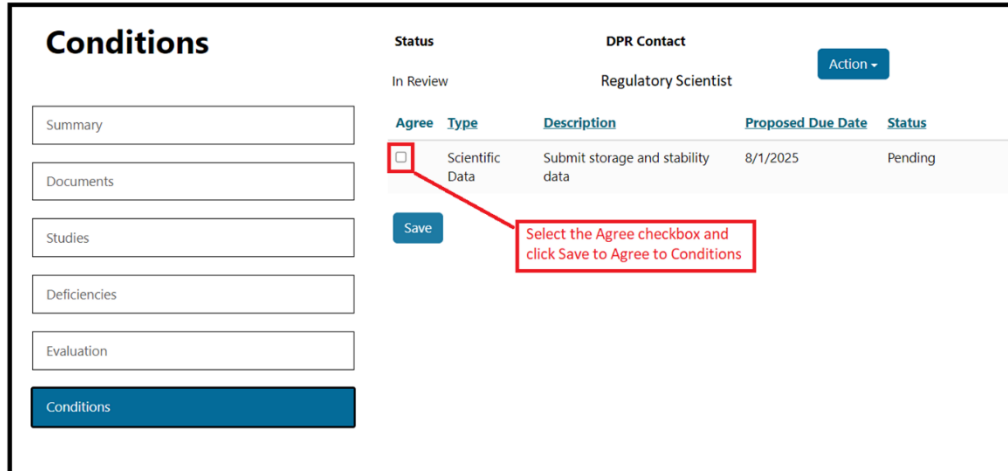
Figure 3.151: CRR Details – Summary – Action



3.6.1.3 Agree to Conditions

The user will see any conditions associated with the submission. The user will check the box next to the condition and click the Save button to agree. The user may email the DPR Contact assigned to the submission with questions about the conditions.

Figure 3.152: Submission Details – Conditions



3.6.1.4 View Deficiencies

The user will see any deficiencies associated with the submission with a listed due date.

- | Pro Tip: To submit documentation to satisfy deficiencies, the user will navigate to the Documents tab and upload any needed files directly to the submission.

Figure 3.153: Submission Details – Deficiencies

Status	DPR Contact	Action
In Review	Regulatory Scientist	Action ▾

Description	Due Date
Missing XYZ data for efficacy against ants	7/15/2024

3.6.1.5 Resubmit

The user may resubmit a submission that was returned through CalPEST by selecting the Resubmit option from the Action button on the Submission Summary screen

Figure 3.154: Submission Details – Resubmit

Home / AME-2404857

Status	DPR Contact	Action
Returned	Regulatory Scientist	Action ▾ Resubmit

Company *
123456 | PORTAL TEST COMPANY

Registration Number | Product Name *
123456-85-AA | TEST PRODUCT 1

Amendment Type *
AMENDMENT

Amendment Sub Type *
ADD ALTERNATE FORMULATION OR REVISE FORMULATION, ADD CROP/SITE/USE (NON-MAJOR), AD... ▾

Federal Concurrent Type *
NOT APPLICABLE

3.6.2 Pending

The Pending Dashboard will display any Pending request or submission that the user initiated within CalPEST.

Figure 3.155: Pending Dashboard

Dashboard

Action Required | **Pending** | Completed Submissions | Draft Submissions | Pending Invoices

Search:

Received Date	CALPEST ID	Type	Company	Product Name	Registration Number	Status
06/25/2024	DAT-2400908	REEVALUATION	123456 PORTAL TEST COMPANY			Pending
06/25/2024	PRO-2400911	SECTION 3 REGULAR REGISTRATION	123456 PORTAL TEST COMPANY	TEST PEST AWAY		Pending
06/25/2024	AME-2400912	NOTIFICATION	123456 PORTAL TEST COMPANY	TEST PRODUCT DEF	123456-1715-AA	Pending
06/25/2024	PRO-2400913	SECTION 3 REGULAR REGISTRATION	90210 BEVERLY HILLS PEST TEST	TEST PROD GHI2000	90210-254	Pending

Showing 1 to 4 of 4 entries Previous Next

3.6.2.1 Upload Documents

The user may upload additional documents directly to an active submission. A yellow, on-screen banner alerts the user that uploading additional documents may extend the processing time.

Figure 3.156: Submission Details – Upload Documents

Documents

Summary
Documents
 Studies
 Deficiencies
 Evaluation
 Conditions

Status
 In Review

DPR Contact
 Regulatory Scientist

Action

* = Required

Note: Uploading additional documents may extend the processing time. Documents containing Confidential Business Information (CBI) will not be viewable.

+ Select Documents Upload

Uploaded Documents

Search documents...

Document Name	Document Category	Document Size
COVER LETTER.pdf	Cover Letter	30.1 KB
Product Label.pdf	Label - Standard	80.7 KB
CONFIDENTIAL PFI.pdf	Product Formulation Information (PFI)	33.82 KB

3.6.2.2 Request Unlock

If a pending submission has a status of In Review, the user may request to unlock a submission to correct any errors on the submission form. The user will receive an email notification when the submission has been unlocked for editing.

Figure 3.157: Submission Details – Request Unlock

The screenshot displays the 'Submission Details' page for a submission in 'In Review' status. On the left, a 'Summary' sidebar contains tabs for Summary, Documents, Studies, Deficiencies, Evaluation, and Conditions. The main content area is divided into two sections: 'General Information' and 'Special Registration Type'. In the 'General Information' section, the 'Status' is 'In Review' and the 'DPR Contact' is 'Regulatory Scientist'. A red box highlights an 'Action' dropdown menu with a 'Request Unlock' option. The 'Company' is listed as '123456 | PORTAL TEST COMPANY'. The 'Registration Type' is 'SECTION 3 REGULAR REGISTRATION'. Under 'Special Registration Type', the 'NOT APPLICABLE' checkbox is selected. The 'U.S. EPA Establishment Number' field is currently empty.

When the submission has been unlocked for editing, the submission displays an Edit tab where the user may edit the submission form. After editing the submission form, the user must click Save at the bottom of the form to save the changes.

Figure 3.158: Submission Details – Edit

Edit

- Summary
- Documents
- Studies
- Edit
- Deficiencies
- Evaluation
- Conditions

Status

In Review

DPR Contact

Regulatory Scientist

Product Information

Product Name (exactly as shown on the label) *

This must be EXACTLY the same as the brand name on the product labeling and the same brand name registered by U.S. EPA (if applicable). The product brand name cannot be the same as another product with a different formulation. Do not include symbols used in place of words that are part of the brand name (e.g., @, TM, ®, etc.).

TEST 10

U.S. EPA Registration Number

123456 | PORTA... - 102 - Select a Suppl...

Product Type (check at least one box) *

ADDITIONAL BRAND NAME MASTER LABEL
 SUPPLEMENTAL DISTRIBUTOR NOT APPLICABLE

Signal Word (as shown on label) *

CAUTION

Container Information *

Describe the actual container(s) that hold the formulated product. Specify the container type, composition, and size that will be sold and distributed in California. For example, Container Type: bottle; Composition: fluorinated high-density polyethylene (HDPE); Sizes: 1, 2, and 5 gallons.

16 oz HDPE Bottle

Pesticide Classification Information

Pesticide Classification (check all that apply) *

BIOCHEMICAL CHEMICAL
 MICROBIAL OTHER

Pesticide Category (check all that apply) *

ADJUVANT ALGAEICIDE/ALGISTAT
 ANTIFOULANT ANTIMICROBIAL
 ATTRACTANT AVICIDE

3.6.2.3 View Evaluation Details

The user may view evaluation program findings and pre-decisional reports from the Evaluation tab of the submission.

Figure 3.159: Submission Details – Evaluations

Evaluation

- Summary
- Documents
- Studies
- Deficiencies
- Evaluation
- Conditions

Status	DPR Contact
In Evaluation	Regulatory Scientist

Evaluation Team	Finding	Evaluation Status
Microbiology	Studies Support Registration	Complete
Plants, Pests, and Diseases	Studies Support Registration	Complete
Surface Water	Studies Support Registration	Complete

Documents

Document Name	Document Category	Document Size
Microbiology Report_2024_07_24.pdf	Evaluation Report (Microbiology)	50 KB
Plants, Pests, and Diseases Report_2024_07_24.pdf	Evaluation Report (Plants, Pests, and Diseases)	50 KB
Surface Water Report_2024_07_24.pdf	Evaluation Report (Surface Water)	50 KB

3.6.3 Completed Submissions

Completed Submissions will display the user's Requests and Submissions that have been completed within CalPEST.

Figure 3.160: Completed Submissions Dashboard

Dashboard

Action Required
Pending
Completed Submissions
Draft Submissions
Pending Invoices

Search:

Received Date	CALPEST ID	Type	Company	Product Name	Registration Number	Status
06/24/2024	CRR-2400877	Administrator	123456 PORTAL TEST COMPANY			Approved
06/24/2024	CAR-2400868	Administrator	98765 CA CHEMICAL COMPANY			Approved
06/24/2024	CRR-2400864	Administrator	90210 BEVERLY HILLS PEST TEST			Approved
06/24/2024	CAR-2400861	Administrator	98765 CA CHEMICAL COMPANY			Approved
06/24/2024	CAR-2400859	Submitter	123456 PORTAL TEST COMPANY			Approved
06/21/2024	CAR-2400824	Submitter	90210 BEVERLY HILLS PEST TEST			Approved

Showing 1 to 6 of 6 entries
Previous 1 Next

3.6.4 Draft Submissions

Draft Submissions will display any Submissions that the user started, but has not submitted, within CalPEST. The user can edit or delete draft submissions.

Figure 3.161: Draft Submissions Dashboard

Created On	CALPEST ID	Type	Company	Product Name	Registration Number	Options
06/25/2024	PRO	REEVALUATION	90210 BEVERLY HILLS PEST TEST	TEST PROD DEF5000	90210-665	Options Edit Delete
06/25/2024	DAT	REEVALUATION	123456 PORTAL TEST COMPANY			

3.6.5 Pending Invoices

Pending Invoices will display any pending (unpaid) invoice that was initiated by the user within CalPEST.

Figure 3.162: Pending Invoices Dashboard

Received Date	Invoice Number	Total	Balance
06/12/2024	REG2024-01127	\$1,150.00	\$1,150.00
06/12/2024	REG2024-01126	\$25.00	\$25.00
06/12/2024	REG2024-01125	\$6,150.00	\$6,150.00
06/11/2024	REG2024-01123	\$6,100.00	\$6,100.00
06/04/2024	REG2024-01102	\$6,175.00	\$6,175.00

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