



State of California – Natural Resources Agency

Edmund G. Brown Jr., Governor

California Energy Commission

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# Modernized Appliance Efficiency Database System (MAEDBS)

## Instruction Manual

California Energy Commission

August 2015

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# 1 Overview

Two training sessions were held at the California Energy Commission for MAEDBS. The first session was held on April 1, 2015 from 12:30pm-4:30pm and the second session was held on April 6, 2015 from 8:00am-12:00pm. Each session discussed and walked through the following topics: Introduction, Validation Rules, Create and Submit Data Submittals, Create and Submit Applications, Processing, Public Search, Account Management/Reports and Enforcement. The following CEC Staff participated in the training sessions: Carolyn McCormack, Ben Fischel, Christine Awtrey, Betty Chrisman, John Nuffer, Bruce Helft, Maunee Berenstein and Consuelo Martinez.

## 1.1 Goals

The goal of the MAEDBS Training Manual is to provide a quick reference guide to the functions of MAEDBS. This training manual has been designed to guide the user through a simple step-by-step process of completing different application processing tasks.

In this manual, users will learn how to:

- Create an External Account
- Add Users to the Company Account
- Recover User ID and Password
- Submit Appliance Information
- Submit Approval Application
- Review Submittal Information
- Staff Entry of Submittal Information
- Staff Processing of Submittals & Applications
- Search for Information
- Account Management
- Enforcement
- Generate Reports
- Validate Rules
- Update Master Data

## 1.2 Assumptions

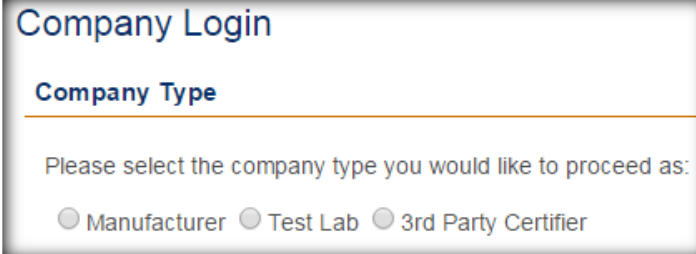
It is assumed that those who use this quick reference guide meet the below criteria prior to use of the guide:

- Have a thorough understanding of CEC business processes specific to their job.
- Have a basic, working knowledge of a Windows/ GUI environment (e.g., using computer mouse) and familiarity with computer usage terms: click, double click, field, select, copy, paste, drop-down, drag-and-drop, scrolling, cursor, (mouse) pointer, save, delete, cancel, and clear.

## 2 Non-CEC Staff Layout

### 2.1 External Login – Select Company Type

When a company is added to the MAEDBS system, company type is selected in the account creation process. The company can be a Manufacturer, Test Lab and/or 3<sup>rd</sup> Party Certifier. Their account can include any or all of the company types. This selection is important because if multiple company types are selected, then every time they log in to the system, they will need to select which company type they will be acting as to do their business.



**Company Login**

**Company Type**

Please select the company type you would like to proceed as:

☐ Manufacturer ☐ Test Lab ☐ 3rd Party Certifier


### 2.2 Global Home Tab

Once the company has logged in and selected the Company Type, the Home Page is displayed.



### 2.2.1 Manufacturer Home Page

If the Company Type selected was "Manufacturer", then the following Home Page displays:



CALIFORNIA  
ENERGY COMMISSION

onDev2 TestAmitOnDev | Logout

Acceptance

HOMEAPPLICATIONSACCT MGMT

Manufacturer Home

Submittals

Applications

Delegations

Notifications

Submittal #

Submittal Status

Assigned To

Received From

Received To

Order By First Field

Order By Second Field

Search

Results15 record(s) found


Export To:ExcelCSV

	Submittal#	Assigned To	Appliance Type	Status	Manufacturer	Third Party	Received Date	Time Spent(Hours)
Select	SUB83	staffuser	CommCook	Pending Review	AmitTestExternal	AmitTestExternal	02/05/2015	1497
Select	SUB85		CeilingFans	Processed	AmitTestExternal	AmitTestExternal	02/06/2015	1333
Select	SUB85		CeilingFans	Processed	AmitTestExternal	AmitTestExternal	02/06/2015	1333
Select	SUB524	testStaff	SmallEWH	Pending Review	AmitTestExternal	AmitTestExternal	03/30/2015	225
Select	SUB532	mved	AudioVideo	Processed	AmitTestExternal	AmitTestExternal	03/31/2015	16
Select	SUB535		LargeAndVeryLargeHP	Processed	AmitTestExternal	AmitTestExternal	04/02/2015	38
Select	SUB533		LargeAndVeryLargeHP	Pending Review	AmitTestExternal	AmitTestExternal	04/02/2015	153
Select	SUB536		SmallEWH	Pending Review	AmitTestExternal	AmitTestExternal	04/02/2015	153
Select	SUB537		AudioVideo	Processed	AmitTestExternal	AmitTestExternal	04/03/2015	13
Select	SUB539		SmallEWH	Pending Review	AmitTestExternal	AmitTestExternal	04/03/2015	114
Select	SUB540		CeilingFans	Pending Review	AmitTestExternal	AmitTestExternal	04/06/2015	44
Select	SUB541		CeilingFans	Pending Review	AmitTestExternal	AmitTestExternal	04/06/2015	43
Select	SUB542		CeilingFans	Pending Review	AmitTestExternal	AmitTestExternal	04/06/2015	43
Select	SUB544		CeilingFans	Pending Review	AmitTestExternal	Cesar Chavez Testing	04/06/2015	43
Select	SUB545		AudioVideo	Pending Review	AmitTestExternal	AmitTestExternal	04/07/2015	23

## 2.2.2 Test Lab Home Page

If the Company Type selected was “Test Lab”, then the following Home Page displays:

onDev2 TestAmitOnDev | Logout



CALIFORNIA  
ENERGY COMMISSION

Acceptance

HOMEAPPLICATIONSACCT MGMT

Test Laboratory Home

ApplicationsNotifications

Application #

Manufacturer Name

Application Status  
All

Assigned To  
Please Select

Received From

Received To

Order By First Field  
Please Select

Order By Second Field  
Please Select

Search

Results 34 record(s) foundExport To: ExcelCSV

Type	Application#	Assigned To	Status	Manufacturer	Delegated Company	Received Date	Time Spent(Hours)
Select 3rd Party Certifier Application	APP17		Submitted	AmitTestExternal		01/19/2015	1900
Select 3rd Party Certifier Application	APP18		Submitted	AmitTestExternal		01/19/2015	1900
Select 3rd Party Certifier Application	APP20		Submitted	AmitTestExternal		01/19/2015	1899
Select 3rd Party Certifier Application	APP21		Submitted	AmitTestExternal		01/19/2015	1899
Select 3rd Party Certifier Application	APP22		Submitted	AmitTestExternal		01/19/2015	1898
Select 3rd Party Certifier Application	APP22		Submitted	AmitTestExternal		01/19/2015	1898
Select 3rd Party Certifier Application	APP23		Submitted	AmitTestExternal		01/19/2015	1898
Select 3rd Party Certifier Application	APP23		Submitted	AmitTestExternal		01/19/2015	1898
Select 3rd Party Certifier Application	APP24		Submitted	AmitTestExternal		01/19/2015	1898
Select 3rd Party Certifier Application	APP26		Submitted	AmitTestExternal		01/19/2015	1898
Select Test Lab Application	APP27		Submitted	AmitTestExternal		01/19/2015	1898
Select 3rd Party Certifier Application	APP41		Approved	AmitTestExternal		01/20/2015	14
Select 3rd Party Certifier Application	APP40		Approved	AmitTestExternal		01/20/2015	13
Select 3rd Party Certifier Application	APP45		Approved	AmitTestExternal		01/20/2015	15
Select 3rd Party Certifier Application	APP47		Approved	AmitTestExternal		01/20/2015	15

1 2 3

### 2.2.3 3rd Party Certifier Home Page

If the Company Type selected was “3rd Party Certifier”, then the following Home Page displays:

onDev2 TestAmitOnDev | Logout

CA.GOV CALIFORNIA ENERGY COMMISSION

HOME APPLICATIONS ACCT MGMT

Acceptance

3rd Party Certifier Home

Submittals Applications Delegations Notifications

Submittal # Submittal Status Assigned To

Received From Received To Order By First Field Order By Second Field

Search

Results 19 record(s) found Export To: Excel CSV

	Submittal#	Assigned To	Appliance Type	Status	Manufacturer	Third Party	Received Date	Time Spent(Hours)
Select	SUB83	staffuser	CommCook	Pending Review	AmitTestExternal	AmitTestExternal	02/05/2015	1503
Select	SUB85		CeilingFans	Processed	AmitTestExternal	AmitTestExternal	02/06/2015	1333
Select	SUB85		CeilingFans	Processed	AmitTestExternal	AmitTestExternal	02/06/2015	1333
Select	SUB524	testStaff	SmallEWH	Pending Review	AmitTestExternal	AmitTestExternal	03/30/2015	231
Select	SUB532	mved	AudioVideo	Processed	AmitTestExternal	AmitTestExternal	03/31/2015	16
Select	SUB533		LargeAndVeryLargeHP	Pending Review	AmitTestExternal	AmitTestExternal	04/02/2015	159
Select	SUB536		SmallEWH	Pending Review	AmitTestExternal	AmitTestExternal	04/02/2015	159
Select	SUB535		LargeAndVeryLargeHP	Processed	AmitTestExternal	AmitTestExternal	04/02/2015	38
Select	SUB537		AudioVideo	Processed	AmitTestExternal	AmitTestExternal	04/03/2015	13
Select	SUB539		SmallEWH	Pending Review	AmitTestExternal	AmitTestExternal	04/03/2015	120
Select	SUB540		CeilingFans	Pending Review	AmitTestExternal	AmitTestExternal	04/06/2015	50
Select	SUB541		CeilingFans	Pending Review	AmitTestExternal	AmitTestExternal	04/06/2015	49
Select	SUB542		CeilingFans	Pending Review	AmitTestExternal	AmitTestExternal	04/06/2015	49
Select	SUB544		CeilingFans	Pending Review	AmitTestExternal	Cesar Chavez Testing	04/06/2015	49
Select	SUB545		AudioVideo	Pending Review	AmitTestExternal	AmitTestExternal	04/07/2015	29

1 2

### 2.3 Global Applications Tab

Hover over the applications button to view and access application types that are available to the user for submission. The type of applications available to the user will differ based on company type selected at login.

onDev2 TestAmitOnDev | Logout

CA.GOV CALIFORNIA ENERGY COMMISSION

HOME APPLICATIONS ACCT MGMT

Acceptance

### 2.3.1 Manufacturer Applications Tab Options



### 2.3.2 Test Lab Applications Tab Options



### 2.3.3 3<sup>rd</sup> Party Applications Tab Options



## 2.4 Global ACCT MGMT Tab

Hover over the acct mgmt button to view options related to appliance search, advanced search, company information and profile information.

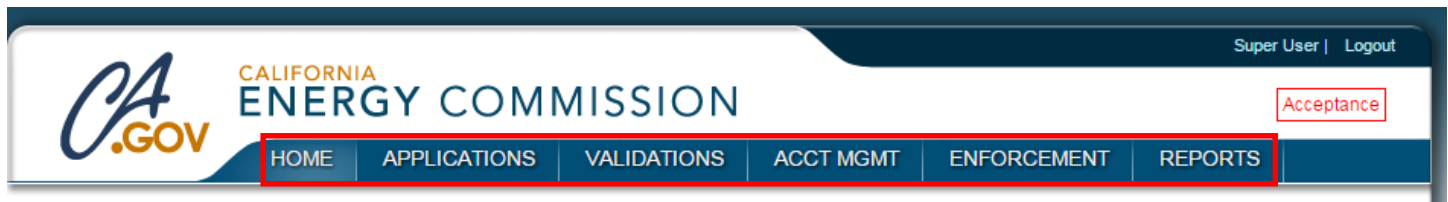


### 2.4.1 ACCT MGMT Tab Options



### 3 CEC Staff Layout

The following screen shot displays each global tab option available to CEC Staff users:



Home: Hover over the home button to select “Staff Home Page”, this will allow a user to navigate back to the logged in user’s account home page.

Applications: Hover over the applications button to view and access different application types that staff can submit on behalf of a company as well as the ability to submit appliance data on behalf of a company.

Validations: Hover over the validations button to view options relating to the management of business rules, master data and decision order.


ACCT MGMT: Hover over the acct mgmt button to view options related to appliance search, advanced search, user search, company search, company information and profile information.

Enforcement: Hover over the enforcement button to view and search a current list of enforcement files, edit an existing file, or create a new file.

Reports: Hover over the reports button to view the types of canned reports that can be generated by staff.

### 3.1 CEC Staff Home Page View

CEC staff will have access to the following tabs: the Submittal tab this is the master view of all appliance data that has been submitted for certification and is ready to be reviewed by CEC staff. The Applications tab has a master view of all Third Party Applications and Test Laboratory Applications that have been submitted for CEC staff approval. The Delegations tab displays all Delegations of Authority that have been submitted by manufacturer accounts. The Notifications tab provides a list of communications to external accounts. The Account Approvals tab displays all new company account requests awaiting processing by CEC staff.



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Staff User | Logout

Acceptance

HOMEAPPLICATIONSVVALIDATIONSACCT MGMTENFORCEMENT

Home Page

SubmittalsApplicationsDelegationsNotificationsAccount Approvals

Submittal #

Manufacturer Name

Third Party Name

Submittal Status  
Pending R ▾

Assigned To  
Please Select ▾

Received From

Received To

Order By First Field  
Please Select ▾

Order By Second Field  
Please Select ▾

Search

Results 52 record(s) found

Export To: ExcelCSV

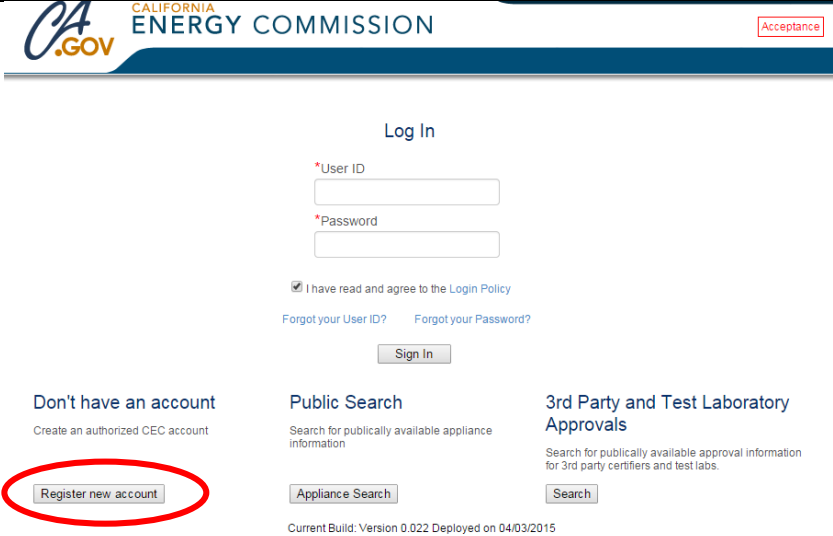
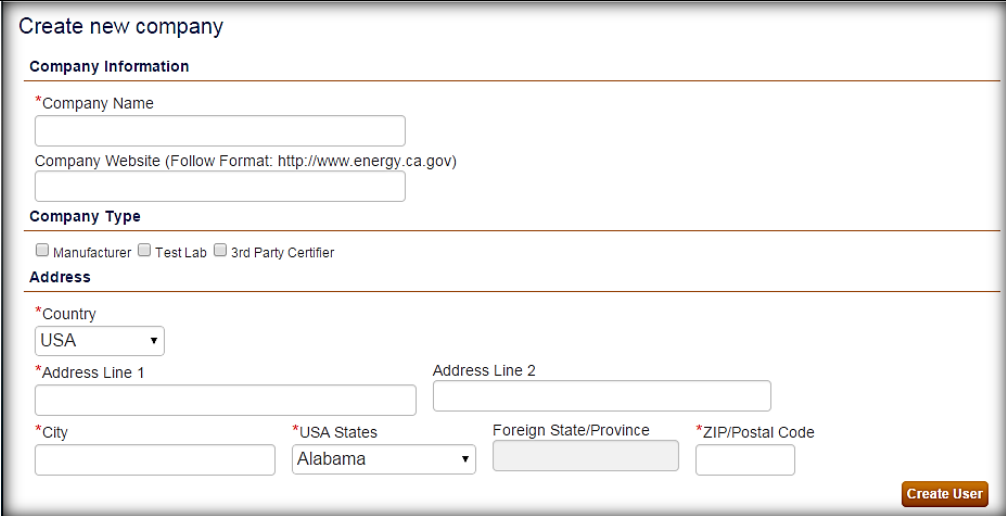

	Submittal#	Assigned To	Appliance Type	Status	Manufacturer	Third Party	Received Date	Time Spent(Hours)
Select	SUB83	staffuser	CommCook	Pending Review	AmitTestExternal	AmitTestExternal	02/05/2015	1497
Select	SUB95		ClothesDryer	Pending Review		AmitTestExternal	02/06/2015	1473
Select	SUB97		ClothesDryer	Pending Review		AmitTestExternal	02/06/2015	1462
Select	SUB99		CeilingFans	Pending Review		AmitTestExternal	02/06/2015	1462
Select	SUB100		CeilingFans	Pending Review		AmitTestExternal	02/06/2015	1462
Select	SUB103		CeilingFans	Pending Review		State TestLab	02/06/2015	1460
Select	SUB104		CeilingFans	Pending Review		State TestLab	02/06/2015	1460
Select	SUB147		EvapAC	Pending Review		State TestLab	02/10/2015	1377
Select	SUB143		GasHP	Pending Review		AmitTestExternal	02/10/2015	1377
Select	SUB149		EvapAC	Pending Review		State TestLab	02/10/2015	1377
Select	SUB138		CompRmAC	Pending Review		State TestLab	02/10/2015	1377
Select	SUB164		EvapAC	Pending Review		State TestLab	02/12/2015	1316
Select	SUB165		CompRmAC	Pending Review		State TestLab	02/12/2015	1316
Select	SUB166		HouseExhaustFans	Pending Review		State TestLab	02/13/2015	1297
Select	SUB196		Dehumidifiers	Pending Review		A H EQUIPMENT CORP / LA SPAS	02/18/2015	1168

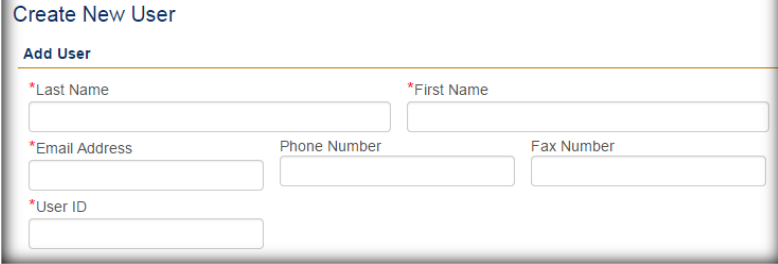

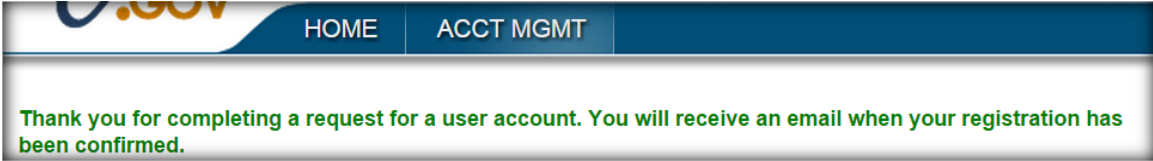
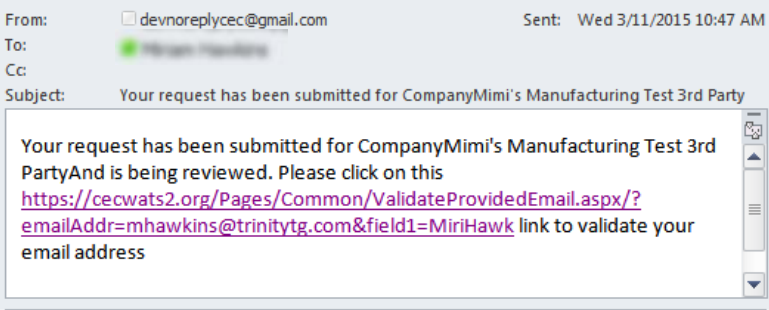
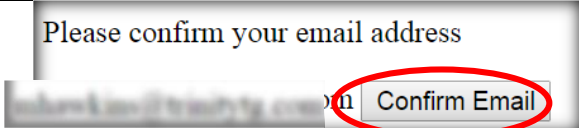
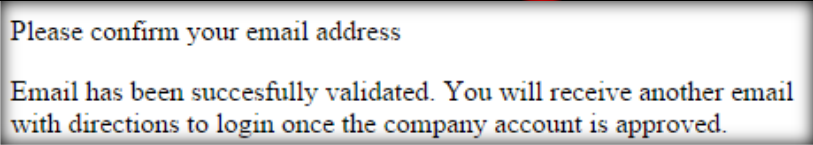
# 4 Reference Guide

## 4.1 Creating an External Account

### 4.1.1 Enter Company and User Information

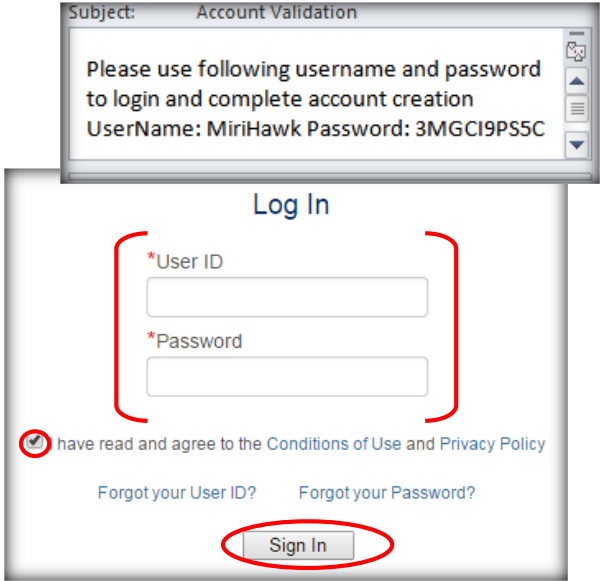
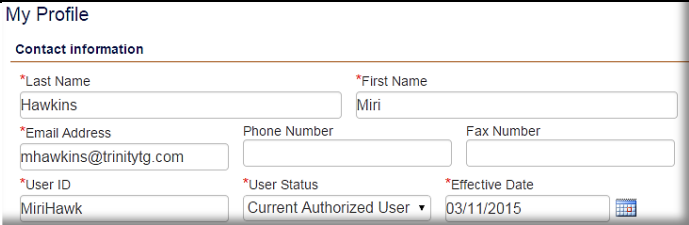
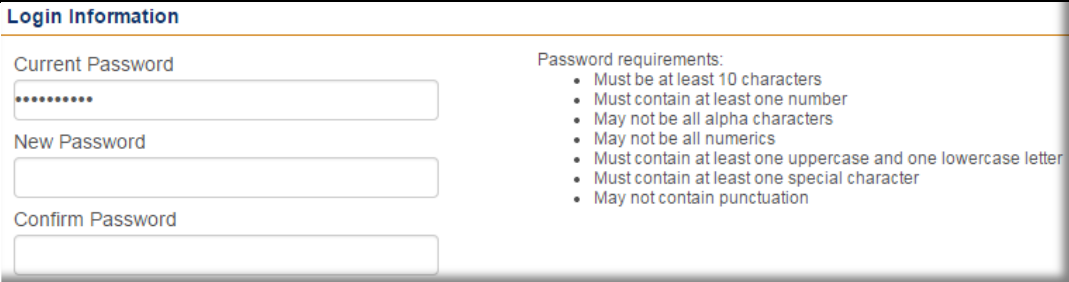
To create a new company account follow these steps:

Steps to Complete Process	
1. Click the "Register New Account" button located on bottom left of the homepage screen.	 <p>The screenshot shows the California Energy Commission homepage. At the top is the logo and 'CALIFORNIA ENERGY COMMISSION'. Below is a 'Log In' section with fields for 'User ID' and 'Password', a checkbox for 'I have read and agree to the Login Policy', and links for 'Forgot your User ID?' and 'Forgot your Password?'. A 'Sign In' button is below. On the left, under 'Don't have an account', is a 'Register new account' button circled in red. On the right, there are sections for 'Public Search' and '3rd Party and Test Laboratory Approvals'. At the bottom, it says 'Current Build: Version 0.022 Deployed on 04/03/2015'.</p>
2. Input company information in the fields provided. Be sure to select all company types that apply.	
 <p>The screenshot shows the 'Create new company' form. It has sections for 'Company Information' (Company Name, Company Website), 'Company Type' (Manufacturer, Test Lab, 3rd Party Certifier), and 'Address' (Country, Address Line 1, Address Line 2, City, USA States, Foreign State/Province, ZIP/Postal Code). A 'Create User' button is at the bottom right, circled in red.</p>	
3. Click the "Create User" button in the bottom right of the screen.	 <p>A close-up of the 'Create User' button, which is orange with white text and is circled in red.</p>

4. Enter user information in the fields provided, including a unique User ID.	
5. Click "Save" button in the top right corner of the screen.	
<p>Note: After clicking "Save" the system will display the note shown below. You will receive an email that confirms your submittal of information and requests validation of the user email address.</p> 	
6. Open the email sent from the system and click on the link to validate your email address.	
7. Click the "Confirm Email" button.	
8. After confirming the email address a message will be displayed to inform the user that the email was successfully validated.	

#### 4.1.2 Complete Account Registration

Once CEC staff members have approved the company account, the user will receive an email informing them that their account is active and they can now login to the system with their User ID and temporary password.

Steps to Complete Process	
1. Referring to the confirmation email received from the system, enter User ID and the temporary password in the fields provided.	
2. Check the box for Conditions of Use and Privacy Policy.	
3. Click on the "Sign In" button to sign in and begin the process of completing the account registration.	
4. Confirm that information listed on the "My Profile" page is correct.	
5. Enter the temporary password provided as well as new password information that meets the password requirements displayed on the screen.	
	

## Steps to Complete Process

6. Select and answer the Security Questions.

Note: Be sure to retain these answers as they will be used to retrieve your ID & password should you forget them.

**Security Questions**

\*Security Question 1  
What is your maternal GrandFathers N ▾

\*Answer 1

\*Security Question 2  
Where were you born? ▾

\*Answer 2

\*Security Question 3  
What is the name of your pet? ▾

\*Answer 3

7. Check the box indicating agreement to the Privacy Statement and the Terms of Usage.

**Privacy and Terms of Use**

Please read our [Privacy Statement](#) and [Terms of Usage](#) and confirm you have seen the policies by checking the box. California State Law requires lawful maintenance and handling of information. By submitting this information is accurate.

☒ I AGREE

8. Click the “Save” button in the top right corner of the screen.

**Save** **Cancel**

9. If you are the company user who will be adding other users from your company to the system, then you will need to select “External System Admin” as your role.

**User Account Information**

**Assign Role**

☒ External System Admin ☐ External Staff

10. Click the “Save” button in the top right corner of the screen.

**Save** **Cancel**

11. After clicking the Save button, a message will be displayed at the top of the screen notifying the user that the record was saved successfully.

**Record saved successfully.**

**User Account Information**

12. The account has now been activated and the user is now able to login with their new password.

**Log In**

\*User ID

\*Password

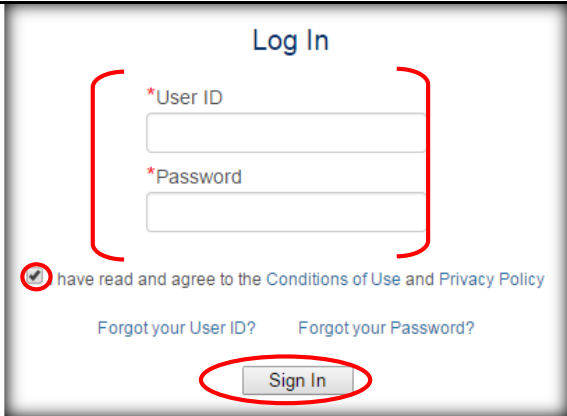
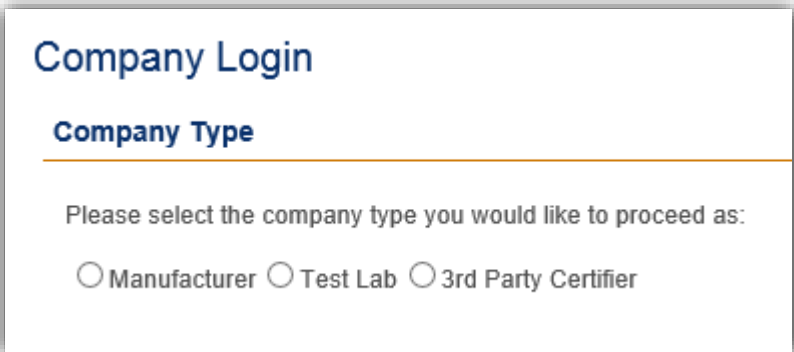

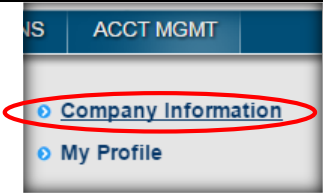
☒ I have read and agree to the [Conditions of Use](#) and [Privacy Policy](#)

[Forgot your User ID?](#) [Forgot your Password?](#)

**Sign In**

## 4.2 Add Users to Company Account

Once the company account has been created, the system administrator for the company account can add additional users. To add additional users to an existing external company account, follow these steps:

Steps to Complete Process	
1. Enter the User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.	
2. Select the company type. <b>Note:</b> This will only be displayed if the company was created with more than one company type.	
3. Click on the "ACCT MGMT" tab at the top of the screen.	
4. Select the "Company Information" link.	
5. Scroll down to the Users grid and click the "Add" button to the bottom right.	

## Company Information Detail

[Save](#)[Cancel](#)

### Company Information

\*Company Name

Mir Energy

Company Website (Follow Format: http://www.energy.ca.gov)

### Company Type

☒ Manufacturer ☒ Test Lab ☒ 3rd Party Certifier

### Address

\*Country

USA

\*Address Line 1

1234 Anywhere You Want

Address Line 2

\*City

Sacramento

\*USA States

California

Foreign State/Province

\*ZIP/Postal Code

95581-0000

### Users

	First Name	Last Name	Role
Select	Miriam	Hawkins	External Staff

[Add](#)

### Approved Appliance Types and Test Methods

Appliance Type	Test Method
No records found	

6. Enter the new user information.

## User Information

[Save](#)[Cancel](#)

### Add or Update User

Last Name

\*First Name

Email Address

Phone Number

Fax Number

User ID

\*User Status

Please Select

\*Effective Date

7. Click on the "Save" button in the top right corner of the User Information page.


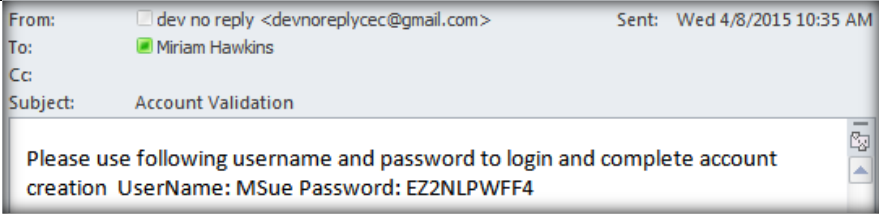
[Save](#)[Cancel](#)

8. Assign the security role for the user by selecting the appropriate boxes.

## User Account Information

### Assign Role

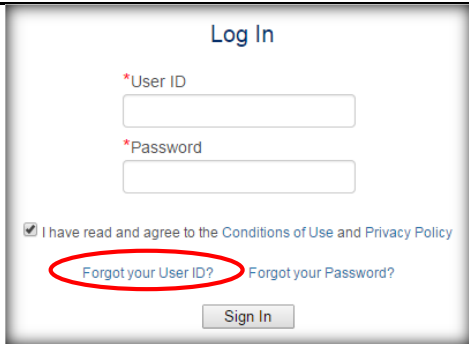
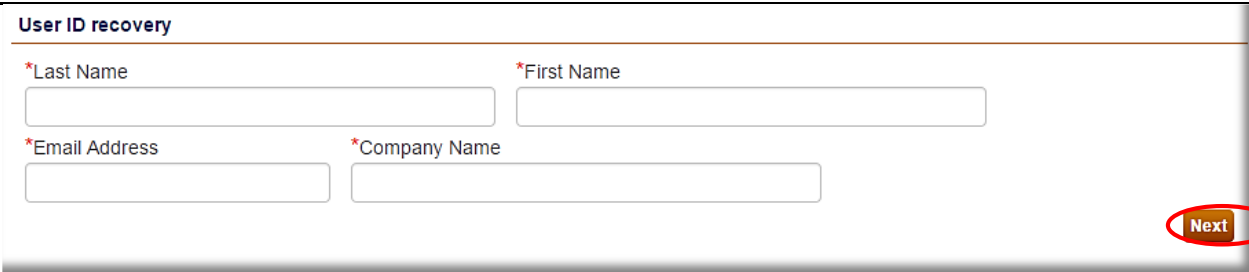
☐ External System Admin ☒ External Staff

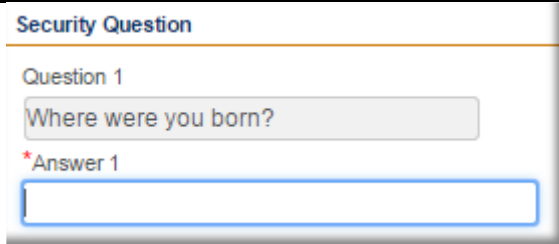

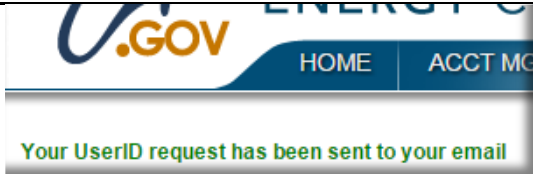
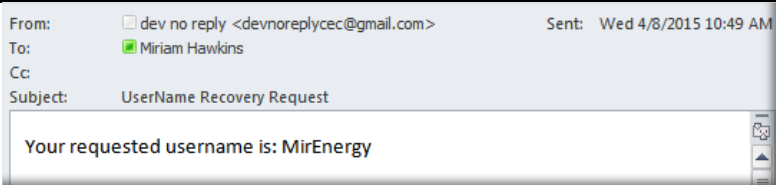
9. Click on the “Save” button in the top right corner of the User Account Information page.	
10. The system will display a message at the top of the screen to inform you that the record was saved successfully.	
Note: Once saved, the system will send the new user their ID and a temporary password via email. Once you login with your temporary password, be sure to change it and keep a record of the new password.	
	

## 4.3 User ID and Password Recovery

### 4.3.1 User ID Recovery Process

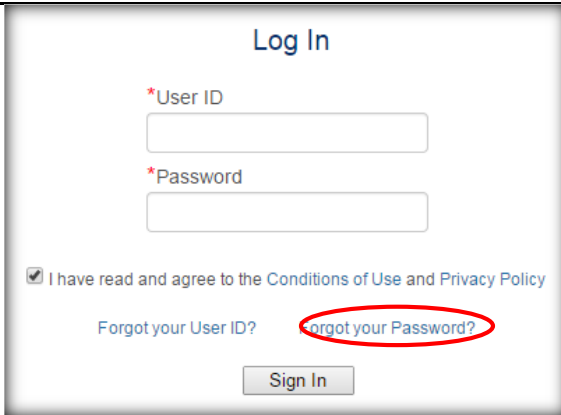
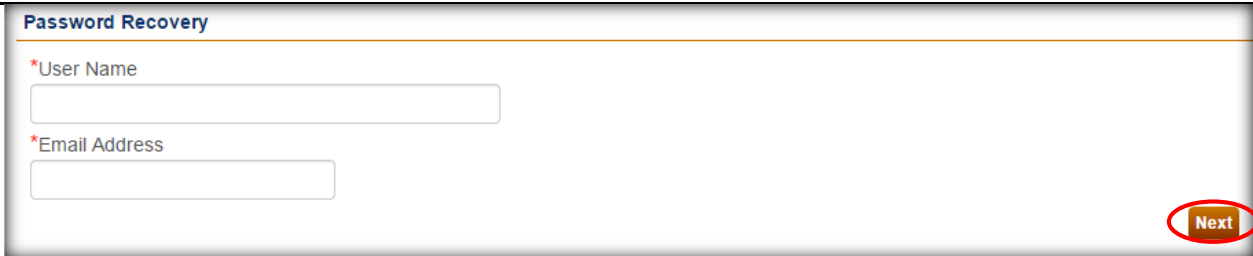
To retrieve a forgotten User ID and Password the process is the same for external users as well as CEC Staff. If a user forgets their User ID, complete the following steps:

Steps to Complete Process	
1. From the Log In screen, click on “Forgot your User ID” link.	
2. Enter user information and then click the “Next” button in the bottom right of the screen.	
	

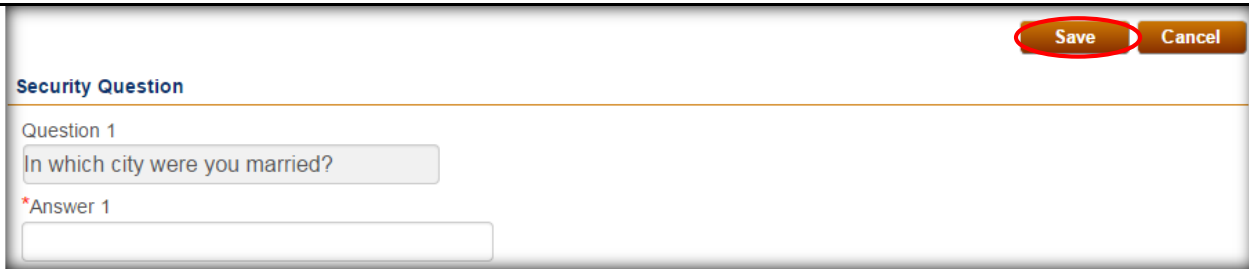
3. Answer the Security Question.	
4. Click the "Save" button in the top right corner.	
5. The system will display a message to let you know that your User ID request has been sent to your email.	
6. System will confirm User ID retrieval and send an email to the account associated to user.	

#### 4.3.2 Password Recovery Process

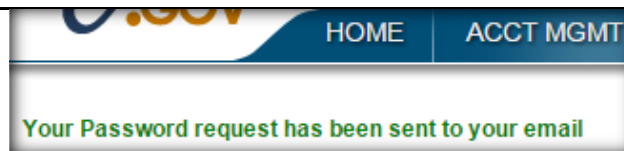
When a user has forgotten their password, follow the steps below to recover it.

Steps to Complete Process	
1. From the Log In screen, click on the "Forgot your Password" link.	
2. Enter the User ID and the associated Email Address (created when the company account was created) and then click the "Next" button in the bottom right of the screen.	
	

3. Answer the Security Question that was first answered when the user profile was created (see Section 4.1.3) and then click the “Save” button in the top right corner.

A screenshot of a web form titled "Security Question". At the top right, there are two buttons: "Save" (highlighted with a red circle) and "Cancel". Below the title, there is a section labeled "Question 1" with a text input field containing the question "In which city were you married?". Below this, there is a section labeled "\*Answer 1" with an empty text input field.

4. The system will confirm that a password request has been sent to the email address associated to the user account.



5. The user will receive an email with a temporary password. The user will then have to login and access the profile page to create a new password, otherwise the temporary password will be the designated password.

-----Original Message-----

From: dev no reply [mailto:devnoreplycec@gmail.com]

Sent: Monday, April 06, 2015 2:33 PM

To: Amee Sheldon

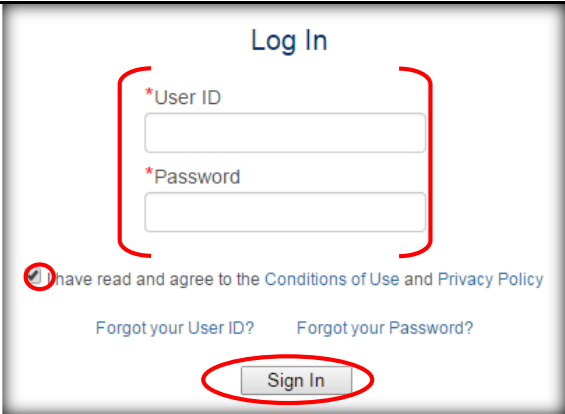
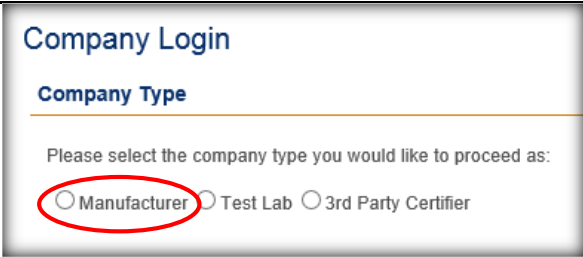
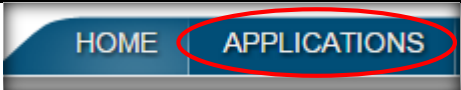

Subject: Password Recovery Request

Please use this password to login:DD23LR119Q

## 4.4 Submit Appliance Information

### 4.4.1 Complete Delegation of Authority

To complete a delegation of authority to a third party certifier, perform the following steps. Proceed to the next section if a delegation is not needed.

Steps to Complete Process		
1. Enter the User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the “Sign In” button.		
2. Select the company type as Manufacturer.  <b>Note:</b> This screen will only be displayed if the company was created with more than one company type.		
3. Click the “Applications” tab at the top of the screen.		
4. Click on the “Delegation of Authority Application” link.  <b>Note:</b> Delegation of Authority will only display as an option if the company type is “Manufacturer”.		
5. Click the “Search” button in the Certifying Company section to add the Third-Party Certifier information from an existing list. Enter the application information in the fields provided.		

Manufacturer Delegation of Authority to Third-Party Certifier for  
Submittal to the California Energy Commission - California Appliance Efficiency Program California  
Code of Regulations, Title 20, Section 1606

Instructions

The form is used twice in the data-submittal process:  
(1) The manufacturer completes and provides this form to the third party certifier each time the manufacturer wants the third party certifier to submit information to the Energy Commission on the manufacturer's behalf.  
(2) With each submittal to the California Energy Commission, the third party certifier includes a completed copy of this form.

Certifying Company

\*Certifying Company Name

Search

Address 1

Address 2

City

State

ZIP/Postal Code

Country

Company Website (URL)

Manufacturer Information

Manufacturer Company Name

California Energy Commission

Search

Address 1

1516 9th St

Address 2

City

Sacramento

State

ZIP/Postal Code

95814

Country

USA

Company Website (URL)

http://www.energy.ca.gov/

Contact First Name

Super

Contact Last Name

User

Search

Phone Number

Fax

Email Address

system@trinitytg.com

This information will be automatically populated with the company information of the logged in user.

6. Select the name of third party certifier from the company list by clicking the "Select" link to the left of the Company name.

Results

Export To:  

	Company	Type	Company WebSite(URL)	Status
Select	California State University Sacramento	Test Lab		Approved
Select	STATE INDUSTRIES	Manufacturer		Approved
Select	State TestLab	Manufacturer	www.energy.ca.gov	Approved
Select	UNITED STATES THERMOAMP INC	Manufacturer		Approved

7. Read the declaration section.

Declaration

I declare under penalty of perjury of the laws of the State of California that:

1. All the information in this statement is true, complete, accurate, and in compliance with all applicable provisions of Sections 1601 – 1608 of Title 20 of the California Code of Regulations.
2. Units of each basic model of appliance for which certification is requested have been tested in accordance with all applicable requirements of Sections 1603 – 1604 of Title 20 of the California Code of Regulations.
3. Section 1606(g) of Title 20 of the California Code of Regulations have been and are being complied with.
4. All units manufactured, distributed or otherwise intended for sale within the State of California have been and are being marked as required by Section 1607 of Title 20 of the California Code of Regulations.
5. The (i) manufacturer's name or brand name or trademark; (ii) model number; and (iii) date of manufacture are permanently, legibly, and conspicuously displayed on an accessible place on each unit.
6. Each unit does comply with the provisions in Tables 6.8.1 A through F of ANSI/ASHRAE/IES Standard 90.1-2007 and is marked, permanently and legibly on an accessible and conspicuous place on the unit, with a statement that the equipment complies with the requirements of ASHRAE Standard 90.1.
7. Each unit does not comply with the provisions in Tables 6.8.1 A through F of ANSI/ASHRAE/IES Standard 90.1-2007 and, therefore, is not marked with a statement that the equipment complies with the requirements of ASHRAE Standard 90.1.
8. The appliance complies with the applicable energy efficiency, energy consumption, energy design, water efficiency, water consumption, and water design standards in Sections 1605.1, 1605.2, and 1605.3 of Title 20 of the California Code of Regulations.

8. Sign the declaration section.

#### Declaration

Dynamic Text place holder

\*Name

\*Title

\*Date



9. Click the "Submit" button at the top right of the screen.

NOTE: When searching for a Certifying Company, that company must already have a valid/approved 3<sup>rd</sup> Party Certifier application in order for the Delegation of Authority to be accepted.

Submit

Cancel

10. Once submitted, the system will display a message to inform the user that the record was saved successfully.

HOME APPLICATIONS ACCT MGMT

Manufacturer Delegation of Authority to Third-Party Certifier for Submittal to the California Energy Commission - California Appliance Efficiency Program, California Code of Regulations, Title 20, Section 1606

Go Back

Record Saved Successfully. Your Delegation of Authority request has been established and is effective for 90 days. The application number is: APP104

11. The submitted delegation of authority application will then appear under the delegations tab in the home page

#### Manufacturer Home

Submittals

Applications

Delegations

Notifications

Application #

Application Status

Assigned To

Received From

Received To

Order By First Field

Search

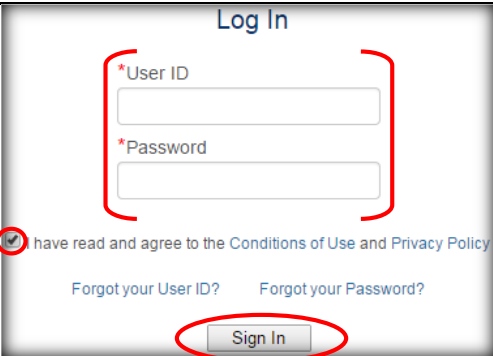
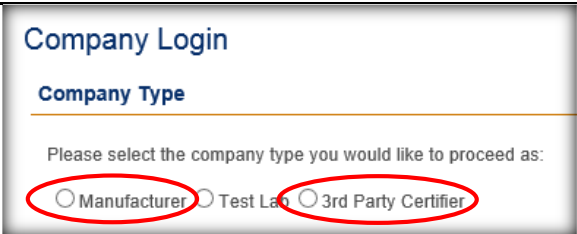
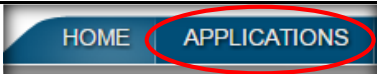

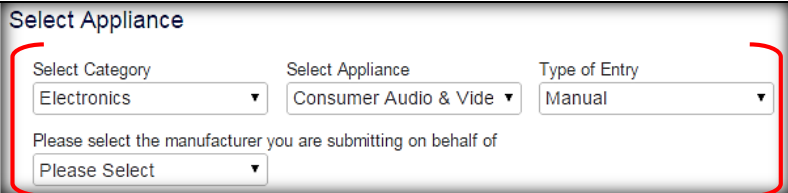

Results 0 record(s) found

Export To: Excel CSV

	Type	Application#	Assigned To	Status	Manufacturer	Delegated Company	Received Date	Time Spent(Hours)
Select	Delegation of Authority Application	APP7		In Review	AmitTestExternal	A H EQUIPMENT CORP / LA SPAS	01/12/2015	2127
Select	Delegation of Authority Application	APP35		Submitted	AmitTestExternal	A J SPA MFR	01/27/2015	1767
Select	Delegation of Authority Application	APP104		Approved	AmitTestExternal	AmitTestExternal	04/08/2015	0

#### 4.4.2 Submit Data - Complete Declaration Page

To submit data, a declaration must first be completed by the user. To complete a declaration and to begin the appliance data submission process, follow the steps below:

Steps to Complete Process	
1. Enter the User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the “Sign In” button.	
2. Select the Company Type as either Manufacturer or 3 <sup>rd</sup> Party Certifier.  <b>Note:</b> This screen will only be displayed if the company was created with more than one company type.	
3. Click the “Applications” tab at the top of the screen.	
4. Select the “Submit Appliance Data” link.	
5. Select Appliance Category, Type and Type of Entry. If your submission is a manual submission select “Manual” from the dropdown for Type of Entry. If you are submitting appliance data via excel upload, select the “Upload” option from the dropdown.  <b>Note:</b> If the user is a 3 <sup>rd</sup> Party Certifier, then they will also need to select the Manufacturer they are submitting on behalf of.	
6. Click the “Next” button located at the bottom right corner of the Select Appliance screen.	
7. Review the information on the Appliance Submittal Declaration screen. The Certifying Company information will be prepopulated with the third party certifier information entered in section 4.4.1.	

## Appliance Submittal Declaration

To meet the requirements of Title 20 Section 1606, companies wishing to certify appliances with the California Energy Commission must provide complete and accurate contact information for themselves and for the test laboratory used to produce the certification data. Companies must then sign this Declaration on the following page. If a test lab was not used (for example, if a manufacturer is requesting only that models be deleted from the certification database), or if an appropriate exception has been met, the Test Laboratory section may be left blank.

### Certifying Company

\*Certifying Company Name

Address 1

Address 2

City

State

ZIP/Postal Code

Country

Company Website (URL)

\*Contact First Name

\*Contact Last Name

Phone Number

Fax

Email Address

### Manufacturer (if different from Certifying Company)

\*Manufacturer Company Name

Address 1

Address 2

City

State

ZIP/Postal Code

Country

Company Website (URL)

Contact First Name

Contact Last Name

Phone Number

Fax

Email Address

- Click the "Add" button located at the bottom right of the Test Laboratory grid. Check the box if submitting appliances to "Delete" in this scenario, there will be no need to add approved Test Labs to the declaration page.

## Test Laboratory

<input type="checkbox"/>	Name	Test Methods
No records found		

**Add**

☐ Check this to skip adding Test Labs if submittal is for Deleting appliances only

9. Click the “Search” button in the center of the screen to select an approved Test Lab.

### Test Lab Search

#### Search Approved Test Labs

Test Laboratory Name

**Search**

10. Enter search criteria to narrow down results and click the “Select” link next to the desired Test Lab.

### Search

Company Name

test

Country

Please Select

Company Type

Please Select

Company WebSite

**Search**

### Results

Export To:

Company	Type	Company WebSite(URL)	Status
<a href="#">Select</a> Shenzhen SEM. Test Electronic Service Co., Ltd.	Test Lab, 3rd Party Certifier	http://www.semtest.com.cn	Approved
<a href="#">Select</a> Shenzhen SEM. Test Technology Co., Ltd.	Test Lab	www.semtest.com.cn	Approved
<a href="#">Select</a> Shenzhen Sinco Testing Technology Co., Ltd.	Test Lab	http://www.sincotest.com	Approved
<a href="#">Select</a> Shenzhen STONE Testing Technology Co., Ltd.	3rd Party Certifier, Test Lab	http://www.stt-lab.org	Approved

11. Select the “Test Methods Performed” and then click the “Next” button to see the selected test lab and test method listed on the Appliance Submittal Declaration screen.

### Test Methods Performed

☒ IEC 62087:2002(E)

**Previous**

**Next**

The selected test lab will appear on the declaration page as shown below:

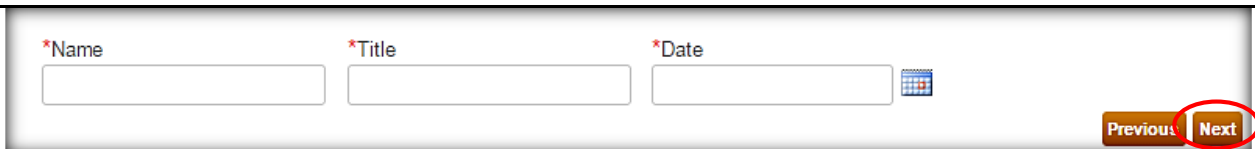
### Test Laboratory

<input type="checkbox"/>	Name	Test Methods
<input type="checkbox"/>	State TestLab	IEC 62087:2002(E)

**Add**

**Delete**

12. Enter declaration information at the bottom of the page and then click the “Next” button.



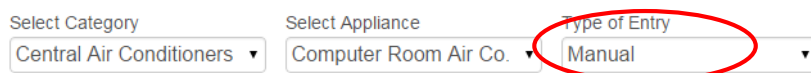
#### 4.4.3 Manually Enter Appliance Data

After completing an appliance submittal declaration, to submit appliance data manually, follow these steps:

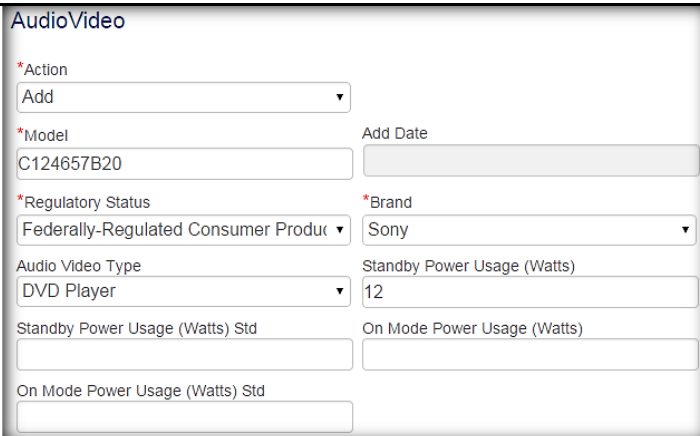
#### Steps to Complete Process

1. When completing the appliance submittal declaration check that “Type of Entry- Manual” was chosen in the dropdown menu. This will prompt the manual form of entry for the selected appliance type when the user selects “Next” from the declaration page.

##### Select Appliance



2. Enter appliance information on detail page by selecting values from the dropdown menus and/or entering values in the text box fields.



3. Click the “Save” button.



4. If you wish to add additional models to the Appliance Data List, click the “Add” button located at the bottom right corner of the Appliance Data List grid. Click the “Next” button in the bottom right corner of the Appliance Data List screen to proceed to the Results screen which displays passed and failed models.

## Appliance Data List

	Action	Appliance Category	Appliance Type	Model #	Manufacturer	Status
Select	<input type="checkbox"/> Add	Electronics	AudioVideo	ABC123	AmitTestExternal	Pending

Delete

Add

Previous

Next

5. Enter the Certification Date and then click the "Submit" button in the top right corner.

### Results

Submit

Cancel

#### Passed

Appliance Type	Manufacturer	Brand	Model #
AudioVideo	AmitTestExternal	Sony	C124857B28

#### Failed

Appliance Type	Manufacturer	Brand	Model #
No records found			

[View Failure Reasons by Category](#)

#### Certification Date

\*Please enter the date these models can be displayed to the public



Re-Upload

Previous

6. Once submitted, the system will display a message at the top of the screen informing the user that the record was saved successfully.

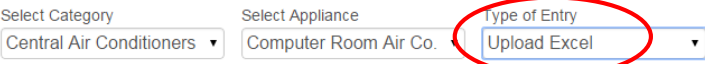

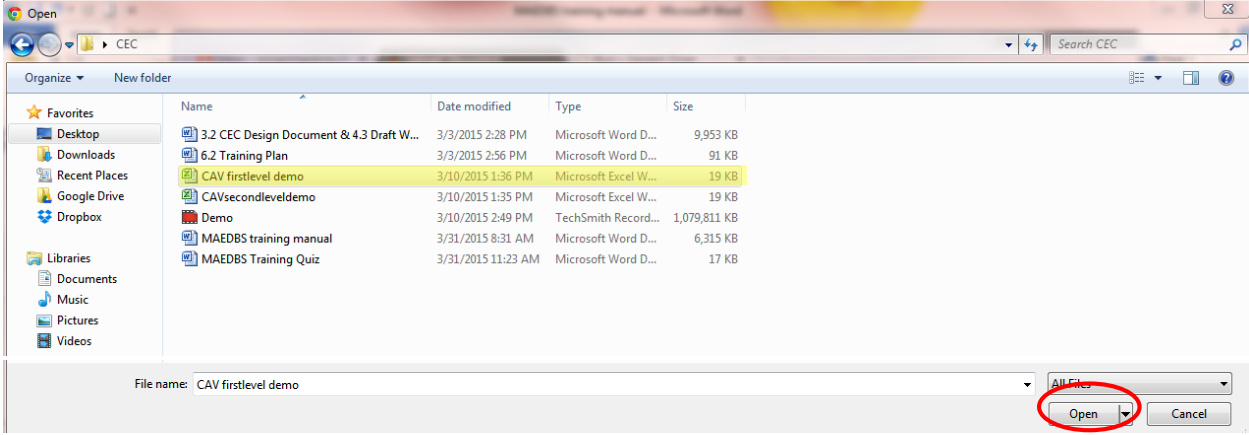

### Results

Go Back

Record saved successfully. Your information has been successfully submitted to the California Energy Commission. The submittal number is: SUB552. Please allow 30 days for processing. If you do not receive a response in 30 days, please contact CEC staff at 555-555-5555

#### 4.4.4 Excel Upload Appliance Data

To submit appliance data via an Excel upload, follow the steps below:

Steps to Complete Process	
1. During completion of the appliance submittal declaration check that “Type of Entry- Upload Excel” is chosen in the dropdown menu. This will prompt the upload entry for the selected appliance type when the user selects “Next” from the declaration page.	<p><b>Select Appliance</b></p> 
2. Click the “Browse/Choose File” button and select the file to upload.  NOTE: Model data must be processed and added to the database prior to submitting a change or delete request.	<p><b>Upload Document</b></p> 
3. Select the Excel file from your computer and click the “Open” button.	
	
4. Click the “Next” button in the bottom right corner of the Upload Document screen.	
5. The list of models from the Excel spreadsheet should display on the Appliance Data List screen. Click the “Next” button in the bottom right corner of the Appliance Data List screen to proceed to the Results screen which displays passed and failed models.	

## Appliance Data List

	<input type="checkbox"/>	Action	Appliance Category	Appliance Type	Model #	Manufacturer	Status
Select	<input type="checkbox"/>	Add	Electronics	AudioVideo	TEST61	AmitTestExternal	Pending
Select	<input type="checkbox"/>	Add	Electronics	AudioVideo	TEST62	AmitTestExternal	Pending
Select	<input type="checkbox"/>		Electronics	AudioVideo	TEST61	AmitTestExternal	Pending

Delete

Add

Previous

Next

NOTE: Only one excel file can be uploaded at a time. To add additional models to a spreadsheet, re-upload the excel sheet or add models manually.

6. Enter the Certification Date and then click the "Submit" button in the top right corner.

## Results

Submit

Cancel

### Passed

Appliance Type	Manufacturer	Brand	Model #
AudioVideo	AmitTestExternal	Antique	TEST3000
AudioVideo	AmitTestExternal	Antique	TEST3002
AudioVideo	AmitTestExternal	Antique	TEST3004
AudioVideo	AmitTestExternal	Antique	TEST3005
AudioVideo	AmitTestExternal	Antique	TEST3001
AudioVideo	AmitTestExternal	Antique	TEST3003

### Failed

Appliance Type	Manufacturer	Brand	Model #
No records found			

[View Failure Reasons by Category](#)

### Certification Date

\*Please enter the date these models can be displayed to the public

Re-Upload

Previous

7. Once submitted, the system will display a message at the top of the screen informing the user that the record was saved successfully.

## Results

Go Back

Record saved successfully. Your information has been successfully submitted to the California Energy Commission. The submittal number is: SUB554. Please allow 30 days for processing. If you do not receive a response in 30 days, please contact CEC staff at 555-555-5555

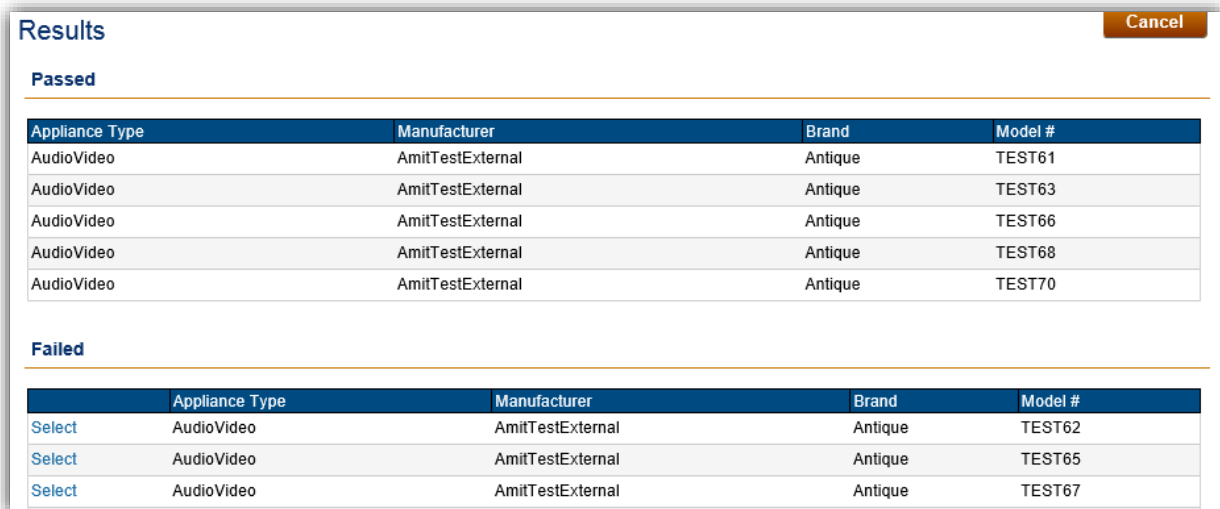
8. The user will then receive a confirmation email once data has been submitted stating the following:

Your appliance data certification submission has been received. Your submittal # SUB725. You will receive a response within 30 days. For assistance, please email [appliances@energy.ca.gov](mailto:appliances@energy.ca.gov) or call 1-800- XXX-XXXX.

#### 4.4.5 Review Validation Results

### Steps to Complete Process

1. Once data has been entered into the system either manually or by Excel upload, the system will validate the data and display appliance models that have passed and failed validation.



The screenshot shows a 'Results' window with a 'Cancel' button in the top right. It is divided into two sections: 'Passed' and 'Failed'.

**Passed**

Appliance Type	Manufacturer	Brand	Model #
AudioVideo	AmitTestExternal	Antique	TEST61
AudioVideo	AmitTestExternal	Antique	TEST63
AudioVideo	AmitTestExternal	Antique	TEST66
AudioVideo	AmitTestExternal	Antique	TEST68
AudioVideo	AmitTestExternal	Antique	TEST70

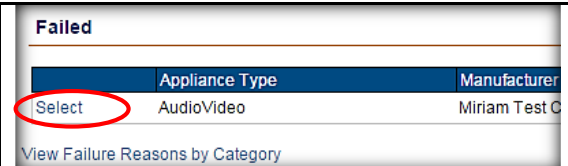
**Failed**

	Appliance Type	Manufacturer	Brand	Model #
Select	AudioVideo	AmitTestExternal	Antique	TEST62
Select	AudioVideo	AmitTestExternal	Antique	TEST65
Select	AudioVideo	AmitTestExternal	Antique	TEST67

2. Users can click the “Select” link next to a failed model to manually edit the entry.

Note: If a large number of items have failed, it may be easier to review the list of failure reasons by category. Click the link “View Failure Reasons by Category” to view a complete list of failures that are sorted by reason for failure.

3. Another option to edit appliance data is to click “Re-Upload” to re-upload a corrected spreadsheet after editing failed models.



The screenshot shows the 'Failed' section of the results window. It contains a table with columns 'Appliance Type' and 'Manufacturer'. The first row shows 'AudioVideo' and 'Miriam Test C'. A 'Select' link is circled in red next to the 'AudioVideo' entry. Below the table is a link that says 'View Failure Reasons by Category'.

	Appliance Type	Manufacturer
Select	AudioVideo	Miriam Test C

[View Failure Reasons by Category](#)



A button labeled 'Re-Upload' is circled in red.

4. Once all models have passed validation, enter the certification date and then click “Submit” to send data to CEC for processing.

**Note:** The “Submit” button will only appear if all models have passed.

Results

Submit Cancel

Passed

Appliance Type	Manufacturer	Brand	Model #
Audio/Video	AmitTestExternal	Antique	TEST3000
Audio/Video	AmitTestExternal	Antique	TEST3002
Audio/Video	AmitTestExternal	Antique	TEST3004
Audio/Video	AmitTestExternal	Antique	TEST3005
Audio/Video	AmitTestExternal	Antique	TEST3001
Audio/Video	AmitTestExternal	Antique	TEST3003


Failed

Appliance Type	Manufacturer	Brand	Model #
No records found			

View Failure Reasons by Category

Certification Date

\*Please enter the date these models can be displayed to the public



Re-Upload

Previous

- Once submitted, the system will display a message at the top of the screen informing the user that the record was saved successfully.

## Results

Go Back

Record saved successfully. Your information has been successfully submitted to the California Energy Commission. The submittal number is: SUB554. Please allow 30 days for processing. If you do not receive a response in 30 days, please contact CEC staff at 555-555-5555

NOTE: Once data has been submitted, the user can no longer make changes to data. If the submittal is rejected or specific models fail, they will have to complete the appliance data submission process again.

- The user will then receive a confirmation email once data has been submitted stating the following:

Your appliance data certification submission has been received. Your submittal # SUB725. You will receive a response within 30 days. For assistance, please email [appliances@energy.ca.gov](mailto:appliances@energy.ca.gov) or call 1-800- XXX-XXXX.

- Once the user logs in after submitting appliance data, the status of the submittal will be listed in the "Submittals" tab on the company home page. The status will be set to "Pending Review" after initial submission and is now awaiting CEC staff approval.

## Manufacturer Home

**Submittals** Applications Delegations Notifications

---

Submittal #

Submittal Status Pending Review

Assigned To Please Select

Received From

Received To

Order By First Field Please Select

**Search**

**Results** Export To: Excel CSV

	Submittal#	Assigned To	Appliance Type	Status	Manufacturer	Third Party	Received Date
Select	SUB544		CeilingFans	Pending Review	AmitTestExternal	Cesar Chavez Testing	04/06/2015
Select	SUB621		ClothesWasher	Pending Review	AmitTestExternal	AmitTestExternal	04/15/2015
Select	SUB719		WaterAC	Pending Review	AmitTestExternal	AmitTestExternal	04/24/2015

8. Once CEC staff processes the submittal the status will display as “Processed” in the company home page. The user is able to sort by status by selecting “Submittal Status” and clicking the “Search” button. If the submittal is in this status, this confirms that the processed appliance data is now searchable in the database.

## Manufacturer Home

**Submittals** Applications Delegations Notifications

---

Submittal #

Submittal Status Processed

Assigned To Please Select

Received From

Received To

Order By First Field Please Select

**Search**

**Results** Export To: Excel CSV

	Submittal#	Assigned To	Appliance Type	Status	Manufacturer	Third Party	Received Date
Select	SUB85		CeilingFans	Processed	AmitTestExternal	AmitTestExternal	02/06/2015
Select	SUB532	mved	AudioVideo	Processed	AmitTestExternal	AmitTestExternal	03/31/2015
Select	SUB535		LargeAndVeryLargeHP	Processed	AmitTestExternal	AmitTestExternal	04/02/2015
Select	SUB537		AudioVideo	Processed	AmitTestExternal	AmitTestExternal	04/03/2015
Select	SUB577		AudioVideo	Processed	AmitTestExternal	AmitTestExternal	04/10/2015
Select	SUB583		AudioVideo	Processed	AmitTestExternal	AmitTestExternal	04/10/2015
Select	SUB684		AudioVideo	Processed	AmitTestExternal	AmitTestExternal	04/22/2015

9. Any notifications sent from the system to the user will be displayed in the “Notifications” tab accessed from the company home page.

## Manufacturer Home

Submittals

Applications

Delegations

Notifications

Application #

Submittal #

Sent Date From

Sent Date To

Search

Results

Export To: 

Excel

CSV

Sent Date	Application#	Submittal#	Subject	From Email	To Email
1/19/2015 1:15:17 PM	APP22		Application Submission	devnoreplycec@gmail.com	arai@trinitytg.com1
1/19/2015 1:17:01 PM	APP23		Application Submission	devnoreplycec@gmail.com	arai@trinitytg.com1
1/19/2015 1:54:25 PM	APP26		Application Submission	devnoreplycec@gmail.com	arai@trinitytg.com1

## 4.5 Submit Approval Application

### 4.5.1 Submit Test Laboratory Approval Application Process

To submit a test lab application, follow these steps:

Steps to Complete Process		
1. Enter the User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.		
2. Select the company type as Test Lab.  <b>Note:</b> This screen will only be displayed if the company was created with more than one company type.		
3. Once logged in to the Test Lab homepage, click the "Applications" tab at the top of the screen.		

## Steps to Complete Process

4. Click on the “Test Laboratory Application” link.

- ◊ [Submit Appliance Data](#)
- ◊ [Delegation of Authority Application](#)
- ◊ [Third Party Certifier Application](#)
- ◊ [Test Laboratory Application](#)

5. Verify that the information on the Test Lab application is correct.

Note: The application will auto populate with the company information of the logged in user.

### California Appliance Efficiency Program 2015 Test Laboratory Application

Submit

Cancel

#### Instructions

- Please allow at least four weeks during the heavy renewal period (November-March) before contacting us regarding your application.

#### Company Information

\*Test Laboratory Name

AmitTestExternal

Search

Address 1

Addr1

Address 2

City

city

State

ZIP/Postal Code

95747

Country

USA

Company Website (URL)

\*Contact First Name

onDev2

\*Contact Last Name

TestAmitOnDev

Search

Phone Number

234-232-3423

Fax

234-234-2342

Email Address

asheldon@trinitytg.com

6. Click the “Add” button to the bottom right of the Appliance Type and Test Method Selection grid.

#### Appliance Type and Test Method Selection

	Appliance Type	Test Method
No records found		

Add

## Steps to Complete Process

7. Select appliance category, type and test methods being used.

Note: Continue this same process to add additional test methods to appliances.

8. Click the “Next” button in the bottom right corner of the screen.



9. Upload any additional documents by clicking the “Upload Documents” button

### Documents

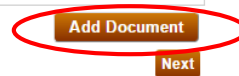
Document Name	Created Date
No records found	



10. From the document list, click on “Add Document” to upload a document to associate to the application.

### Document List

Document Name	Created Date
No records found	



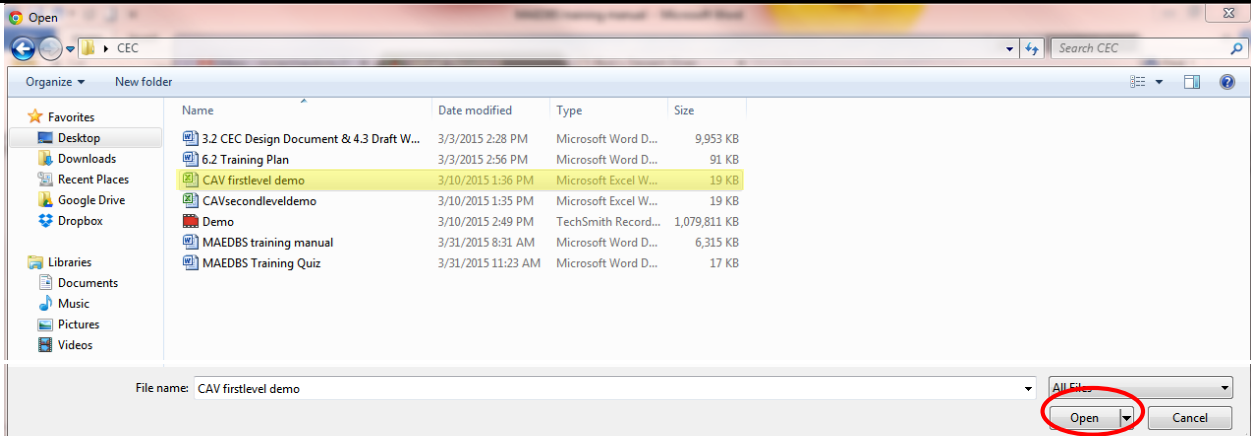
1. Click the “Browse/Choose File” button and select the file to upload.

### Upload Document



2. Select the Excel file from your computer and click the “Open” button.

## Steps to Complete Process



- Click the "Next" button in the bottom right corner of the Upload Document screen.



- The document will now appear in the document list. Select "Next" to return to the application.

### Document List

Document Name	Created Date
L&L orders_04292015093921.xlsx	04/29/2015

[Add Document](#)
[Next](#)

- The uploaded document now appears in the "Documents" section of the application

**Documents**

	Document Name	Created Date
Select	L&L orders_04292015093921.xlsx	04/29/2015

[Upload Documents](#)

- Once all information has been entered click the "Submit" button.

California Appliance Efficiency Program 2015 Test Laboratory Application



#### Instructions

Please allow at least four weeks during the heavy renewal period (November-March) before contacting us regarding your application.

#### Company Information

## Steps to Complete Process

7. Once the application is submitted, the system will display a message at the top of the screen to let the user know the record was saved successfully.

### California Appliance Efficiency Program 2015 Test Laboratory Application

Record saved successfully. The application number is: APP105

8. The user will also receive a confirmation email.

Your application has been received. Your Application Type is Test Lab Application and your application number is APP138. You will receive a response within 30 days. For assistance, please email [appliances@energy.ca.gov](mailto:appliances@energy.ca.gov) or call 1-800-XXX-XXXX.

9. The user can check the application status and review the submitted application in the Test Laboratory Home Page under the Applications tab

### Test Laboratory Home

Applications

Notifications

Application #

Manufacturer Name

Application Status  
All ▼

Assigned To  
Please Select ▼

Received From

Received To

Order By First Field  
Please Select ▼

Search

Results

Export To: 

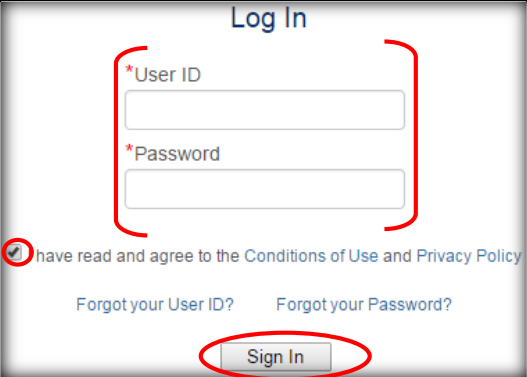
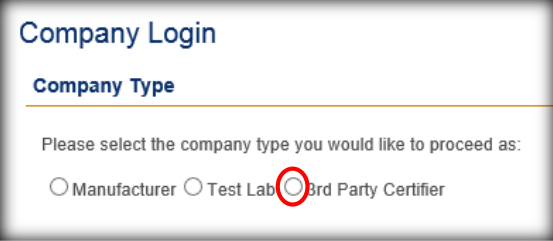
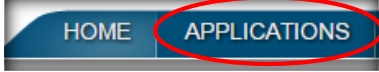

Excel

CSV

	Type	Application#	Assigned To	Status	Manufacturer	Delegated Company	Received Date
Select	Test Lab Application	APP94	mved	Submitted	Cesar Chavez Testing		03/31/2015
Select	Test Lab Application	APP95	suser	Submitted	Cesar Chavez Testing		03/31/2015

#### 4.5.2 Submit Third Party Certifier Application

To submit a third party certifier application, follow these steps:

Steps to Complete Process	
1. Enter the User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the “Sign In” button.	
2. Select the company type as 3 <sup>rd</sup> Party Certifier. <b>Note:</b> This screen will only be displayed if the company was created with more than one company type.	
3. Click the “Applications” tab at the top of the screen.	
4. Click on the “Third Party Certifier Application” link.	
5. Confirm that the listed Certifying Company Information is correct.  Note: The application will auto populate with the company information of the logged in user.	

## Steps to Complete Process

### California Appliance Efficiency Program 2015 Third Party Certifier Application

[Submit](#)[Cancel](#)

#### Instructions

- Please allow at least four weeks during the heavy renewal period (November-March) before contacting us regarding your application.

#### Company Information

\*Certifying Company Name

[Search](#)

Address 1

Address 2

City

State

ZIP/Postal Code

Country

Company Website (URL)

\*Contact First Name

\*Contact Last Name

[Search](#)

Phone Number

Fax

Email Address

#### Certifier Type

- ☐ Appliance Manufacturer Trade Association
- ☐ Appliance Test Laboratory
- ☐ Appliance Brand Holder or Importer
- ☐ Manufacturer
- ☐ Other

6. Mark each applicable checkbox for the Certifier Type.

#### Certifier Type

- ☐ Appliance Manufacturer Trade Association
- ☒ Appliance Test Laboratory
- ☐ Appliance Brand Holder or Importer
- ☒ Manufacturer
- ☐ Other

11. Upload any additional documents by clicking the "Upload Documents" button

#### Documents

Document Name	Created Date
No records found	

[Upload Documents](#)

## Steps to Complete Process

12. From the document list, click on “Add Document” to upload a document to associate to the application.

### Document List

Document Name	Created Date
No records found	

Add Document

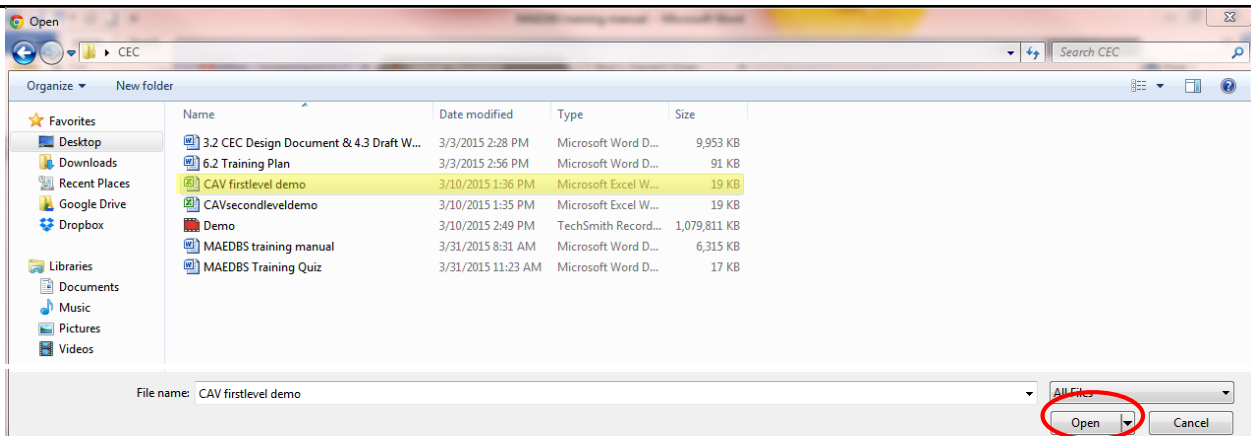
Next

13. Click the “Browse/Choose File” button and select the file to upload.

### Upload Document

Browse...

14. Select the Excel file from your computer and click the “Open” button.



15. Click the “Next” button in the bottom right corner of the Upload Document screen.

Next

16. The document will now appear in the document list. Select “Next” to return to the application.

### Document List

Document Name	Created Date
L&L orders_04292015093921.xlsx	04/29/2015

Add Document

Next

## Steps to Complete Process

17. The uploaded document now appears in the “Documents” section of the application

### Documents

	Document Name	Created Date
Select	L&L orders_04292015093921.xlsx	04/29/2015

Upload Documents

18. Once all information has been entered click the “Submit” button.

California Appliance Efficiency Program 2015 Third Party Certifier Application

Submit

Cancel

### Instructions

Please allow at least four weeks during the heavy renewal period (November-March) before contacting us regarding your application.

### Company Information

19. Once the application is submitted, the system will display a message at the top of the screen to let the user know the record was saved successfully.

California Appliance Efficiency Program 2015 Third Party Certifier Application

Record saved successfully. The application number is: APP144

20. Once the application has been submitted, the user will also receive a confirmation email.

Your application has been received. Your Application Type is 3rd Party Certifier Application and your application number is APP140. You will receive a response within 30 days. For assistance, please email [appliances@energy.ca.gov](mailto:appliances@energy.ca.gov) or call 1-800-XXX-XXXX.

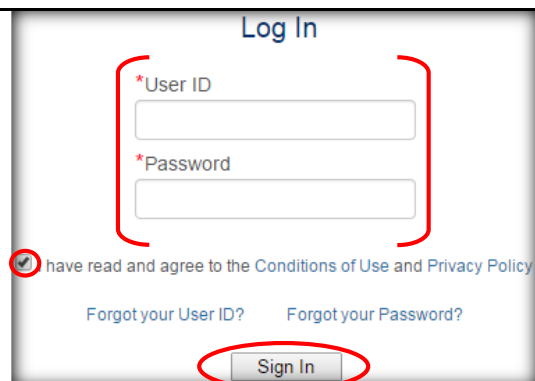
## 4.6 Review Submitted Information

After applications and data have been submitted, follow the steps below to review the submitted information:

### Steps to Complete Process

1. Enter the User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.

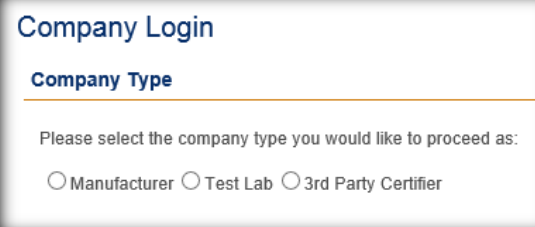
**Note:** Once logged in, the grids on the Home Page will display submittals.



The image shows a 'Log In' form. A red bracket groups the '\*User ID' and '\*Password' input fields. A red circle highlights the checkbox for 'I have read and agree to the Conditions of Use and Privacy Policy'. Another red circle highlights the 'Sign In' button at the bottom.

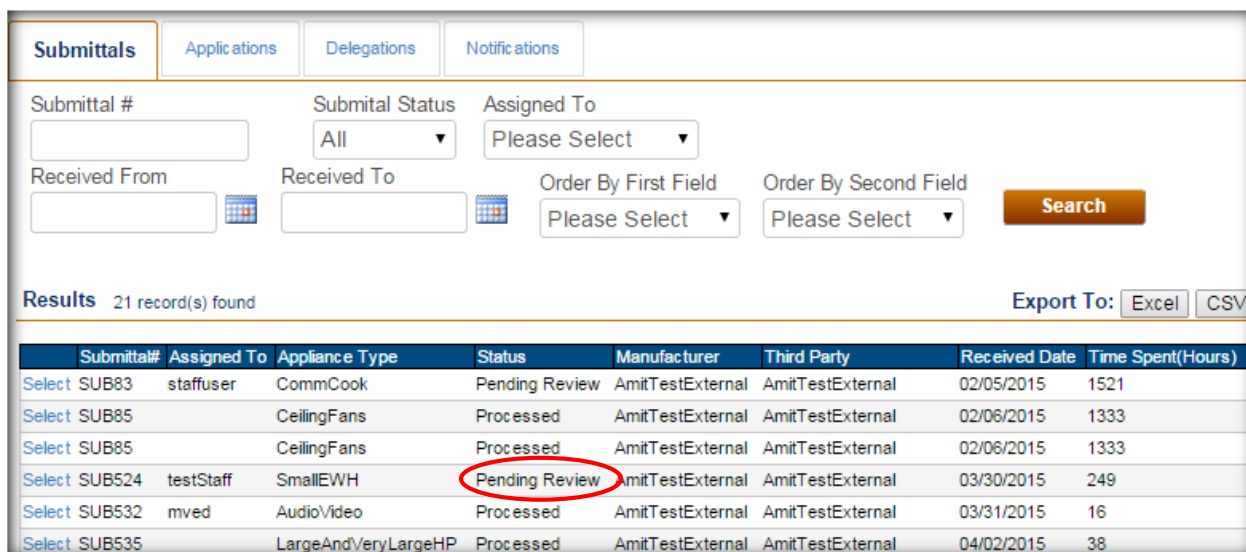
2. Select the company type associated to the submittal(s) you wish to view.

**Note:** This screen will only be displayed if the company was created with more than one company type.



The image shows the 'Company Login' screen. It has a section titled 'Company Type' with the instruction 'Please select the company type you would like to proceed as:'. Below this are three radio buttons: 'Manufacturer', 'Test Lab', and '3rd Party Certifier'.

The 3<sup>rd</sup> Party Certifier Home Page, Manufacturer and Test Laboratory Home Page allows a user to check statuses of Data Submittals, 3<sup>rd</sup> Party Approval Applications, Delegations and view any notifications that have been sent to the user by navigating through each tab.



The image shows the 'Submittals' screen. It has tabs for 'Submittals', 'Applications', 'Delegations', and 'Notifications'. Below the tabs are search filters: 'Submittal #' (input), 'Submittal Status' (dropdown set to 'All'), 'Assigned To' (dropdown set to 'Please Select'), 'Received From' (input), 'Received To' (input), 'Order By First Field' (dropdown set to 'Please Select'), and 'Order By Second Field' (dropdown set to 'Please Select'). A 'Search' button is on the right. Below the filters, it says 'Results 21 record(s) found'. On the right, there are 'Export To' buttons for 'Excel' and 'CSV'. A table of results is shown below:

	Submittal#	Assigned To	Appliance Type	Status	Manufacturer	Third Party	Received Date	Time Spent(Hours)
Select	SUB83	staffuser	CommCook	Pending Review	AmitTestExternal	AmitTestExternal	02/05/2015	1521
Select	SUB85		CeilingFans	Processed	AmitTestExternal	AmitTestExternal	02/06/2015	1333
Select	SUB85		CeilingFans	Processed	AmitTestExternal	AmitTestExternal	02/06/2015	1333
Select	SUB524	testStaff	SmallEWH	Pending Review	AmitTestExternal	AmitTestExternal	03/30/2015	249
Select	SUB532	mved	AudioVideo	Processed	AmitTestExternal	AmitTestExternal	03/31/2015	16
Select	SUB535		LargeAndVeryLargeHP	Processed	AmitTestExternal	AmitTestExternal	04/02/2015	38

## 4.7 Public Search for Information

### 4.7.1 Company Search

To conduct a search for CEC approved companies, a company account is not needed. This feature can be accessed from the login page and is open to the general public.

#### Steps to Complete Process

1. From the login page click the “Search” button located under Third Party and Test Laboratory Approvals header.

CA.GOV CALIFORNIA ENERGY COMMISSION

Acceptance

Log In

\*User ID

\*Password

☒ I have read and agree to the Login Policy

[Forgot your User ID?](#) [Forgot your Password?](#)

Sign In

Don't have an account  
Create an authorized CEC account

Public Search  
Search for publically available appliance information

3rd Party and Test Laboratory Approvals  
Search for publically available approval information for 3rd party certifiers and test labs.

Register new account

Appliance Search

Search

Current Build: Version 0.022 Deployed on 04/03/2015

2. Enter search parameters in the fields provided and then click the “Search” button to the right. The system will display search results based on the criteria provided.

#### Company List

##### Search

Company Name	Country	Company Type
<input type="text"/>	Please Select ▼	Manufacturer ▼
Company Status	Start Date	End Date
Approved ▼	<input type="text"/>	<input type="text"/>

Search

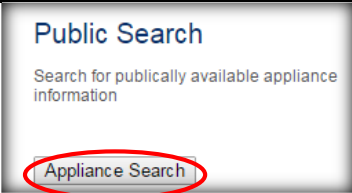
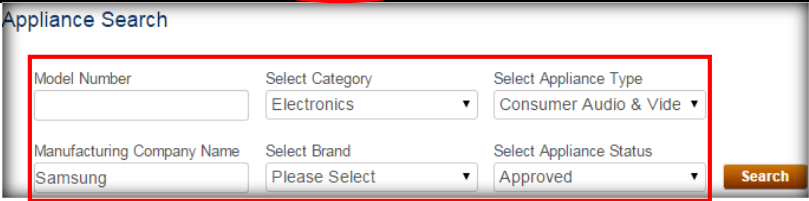
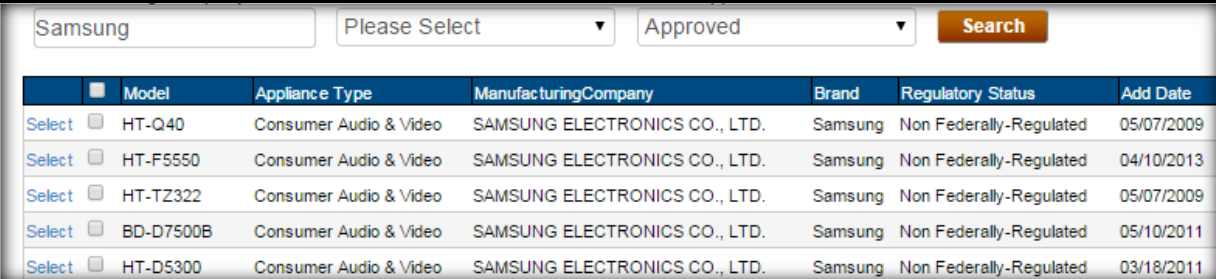
##### Search Results

Export To: [Excel](#) [CSV](#)

	Company	Type	Company WebSite(URL)	Status
Select	AMERICAN ZETTLER INC	Manufacturer		Approved
Select	AMERICH CORP	Manufacturer		Approved
Select	AMGLO KEMLITE LABORATORIES	Manufacturer		Approved
Select	AmitTestExternal	Manufacturer		Approved
Select	AMSTRAD INTERNATIONAL, LTD.	Manufacturer		Approved
Select	AMT-EOI	Manufacturer		Approved
Select	AMTECH CORP/SONOMA SPAS	Manufacturer		Approved

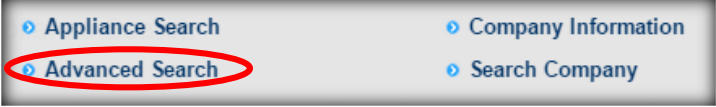
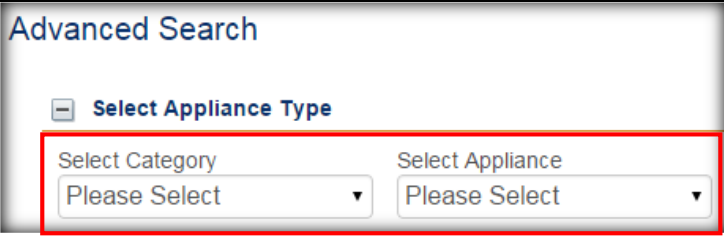
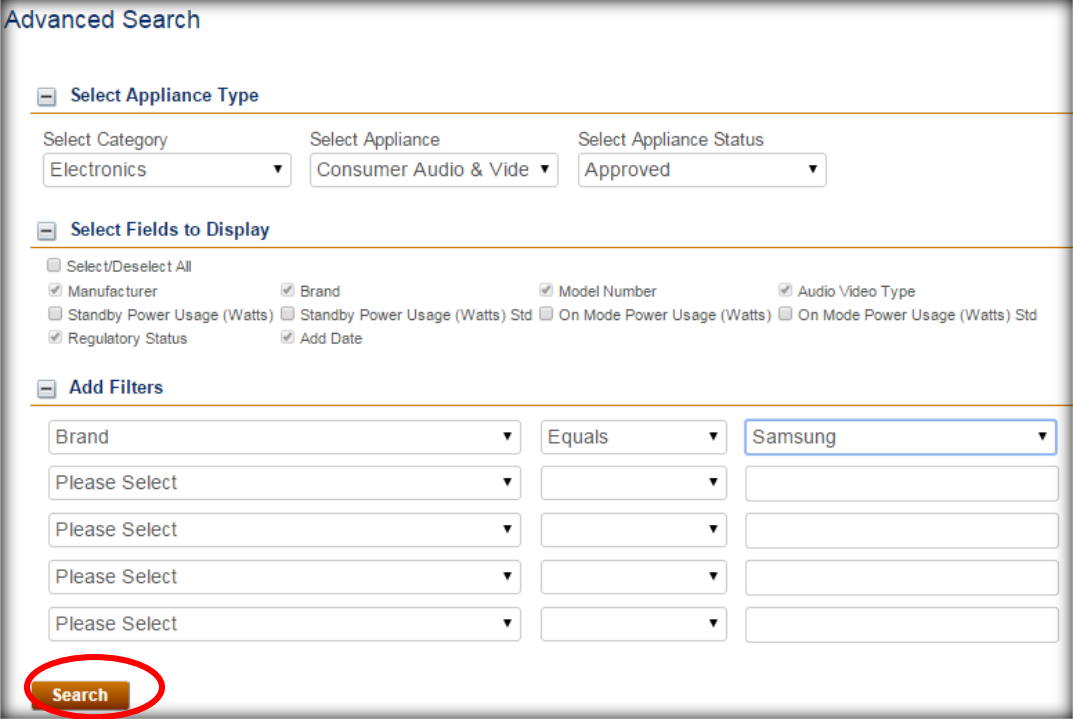
#### 4.7.2 Appliance Quick Search

The appliance search allows the public to search for and view detailed appliance data.

Steps to Complete Process	
1. Click the “Appliance Search” button located under the Public Search header on the login screen.	
2. Enter the appliance search parameters and then click the “Search” button.	
3. The system will display results based on the criteria provided.	
	

#### 4.7.3 Appliance Advanced Search

Steps to Complete Process	
1. From the Login page click the “Appliance Search” button.	
2. Click the “ACCT MGMT” tab in the top menu.	
	

3. Select the “Advanced Search” link.	
4. Select the Appliance Type. Once the Appliance Type is selected additional filters and fields will be made available to create a more detailed search.	
5. Enter the remaining search criteria and then click the “Search” button at the bottom of the screen to display your search results.	
	
6. The system will display results based on the criteria provided.	

### Advanced Search

Recent Searches

Consumer Audio & Video

Select Appliance Type

Select Fields to Display

Add Filters

Search

Search Results 324 record(s) found

Export To: Excel CSV

	ModelNumber	Manufacturer	Brand	ModelStatus	RegulatoryStatus	AddDate	Audio Video Type
Select <input type="checkbox"/>	HT-Q40	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Approved	Non Federally-Regulated	05/07/2009	Compact Audio w/o clock
Select <input type="checkbox"/>	HT-F5550	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Approved	Non Federally-Regulated	04/10/2013	DVD Player
Select <input type="checkbox"/>	HT-TZ322	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Approved	Non Federally-Regulated	05/07/2009	Compact Audio w/o clock
Select <input type="checkbox"/>	BD-D7500B	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Approved	Non Federally-Regulated	05/10/2011	DVD Player
Select <input type="checkbox"/>	HT-D5300	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Approved	Non Federally-Regulated	03/18/2011	DVD Player

#### 4.7.4 Compare Appliance Models

Using the appliance search, a user is able to compare appliance data for up to 5 models at once.

Steps to Complete Process	
1. Click the "Appliance Search" button located under the Public Search header on the login screen	<div> <div>Public Search</div> <div>Search for publicly available appliance information</div> <div>Appliance Search</div> </div>
2. Enter appliance search parameters	<div> <div>Appliance Search</div> <div> <div> <div>Select ModelStatus</div> <div>Please Select</div> </div> <div> <div>Select Regulatory Status</div> <div>Please Select</div> </div> <div> <div>Select Brand</div> <div>Please Select</div> </div> </div> <div> <div> <div>Select Category</div> <div>Please Select</div> </div> <div> <div>Select Appliance</div> <div>Please Select</div> </div> <div> <div>Manufacturing Company Name</div> <div></div> </div> </div> </div>
3. Click the "Search" button and the system will display results based on the criteria provided.	<div>Search</div>
4. Place a checkmark in the boxes of the appliances to be compared and then click the "Compare" button.	

## Steps to Complete Process

Note: Not all appliance types are available for comparison. A user can only compare 5 appliance types at a time.

<input checked="" type="checkbox"/>	Model	Appliance Type	ManufacturingCompany	Brand	Regulatory Status	Add Date
Select <input checked="" type="checkbox"/>	DW80F800***	Dish Washers	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Federally-Regulated Consumer Product	10/18/2013
Select <input checked="" type="checkbox"/>	DW80F600***	Dish Washers	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Federally-Regulated Consumer Product	10/18/2013
Select <input checked="" type="checkbox"/>	DW80H99**U*	Dish Washers	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Federally-Regulated Consumer Product	03/31/2014
<b>Compare</b>						

5. The system will display appliance model information side-by-side for comparison.

Compare Appliances - DishWasher				Cancel
Model Number	DW80F800***	DW80F600***	DW80H99**U*	
Manufacturer	SAMSUNG ELECTRONICS CO., LTD.	SAMSUNG ELECTRONICS CO., LTD.	SAMSUNG ELECTRONICS CO., LTD.	
Brand	Samsung	Samsung	Samsung	
Dishwasher Type	Standard	Standard	Standard	
Total Place Settings	15.00000	15.00000	15.00000	
Per Cycle KWH	1.12000	1.12000	1.20000	
Water Heating?	True	True	True	
Truncated Cycle Capable?	False	False	False	
Annual Energy Use KWH	265.00000	265.00000	258.00000	
Annual Energy Use KWH Std	307.00000	307.00000	307.00000	
WaterUse Gallons per Cycle	3.60000	3.60000	3.00000	
Water Use Std Gallons per Cycle	5.00000	5.00000	5.00000	
Regulatory Status	Federally-Regulated Consumer Product	Federally-Regulated Consumer Product	Federally-Regulated Consumer Product	
Add Date				

## 4.7.5 Export Data

Users will have the option to export data to a CSV or Excel file. This includes data from a company search or advanced search.

1. Select the “Advanced Search” link or the “Search Company” link



2. Enter search parameters in the fields provided and then click the “Search” button to the right. The system will display search results based on the criteria provided.

### Advanced Search

Select Appliance Type

Select Category

Electronics

Select Appliance

Consumer Audio & Video

Select Appliance Status

Approved

3. Click either the Excel icon or the CSV icon at the top right of the search result grid. Note: The system will automatically export the data to the selected file type and should be available in your download folder.

Search Results 326 record(s) found

Export To: Excel CSV

	ModelNumber	Manufacturer	Brand	ModelStatus	RegulatoryStatus	AddDate	Audio Video Type
Select	HT-Q40	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Approved	Non Federally-Regulated	05/07/2009	Compact Audio w/o clock
Select	HT-F5550	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Approved	Non Federally-Regulated	04/10/2013	DVD Player
Select	HT-TZ322	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Approved	Non Federally-Regulated	05/07/2009	Compact Audio w/o clock
Select	BD-D7500B	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Approved	Non Federally-Regulated	05/10/2011	DVD Player
Select	HT-D5300	SAMSUNG ELECTRONICS CO., LTD.	Samsung	Approved	Non Federally-Regulated	03/18/2011	DVD Player

SearchResults.xls

Show all downloads...

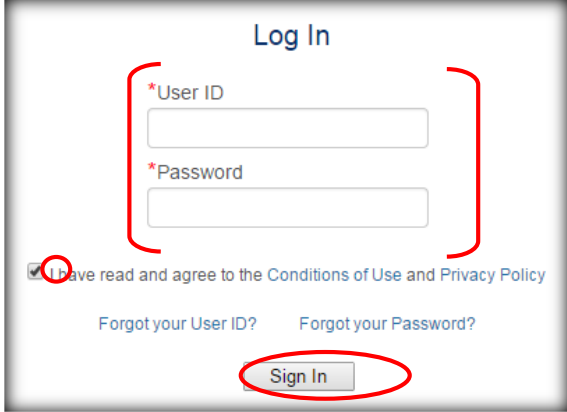

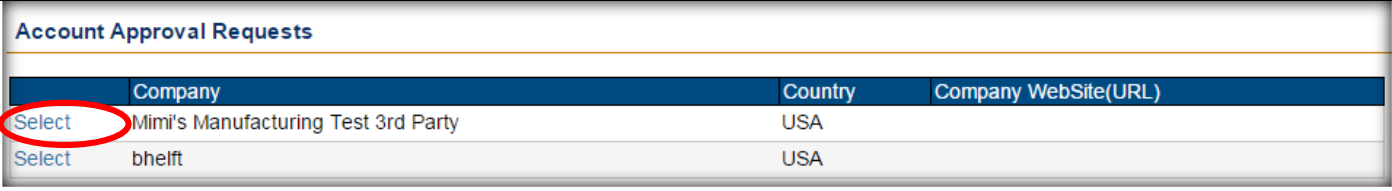
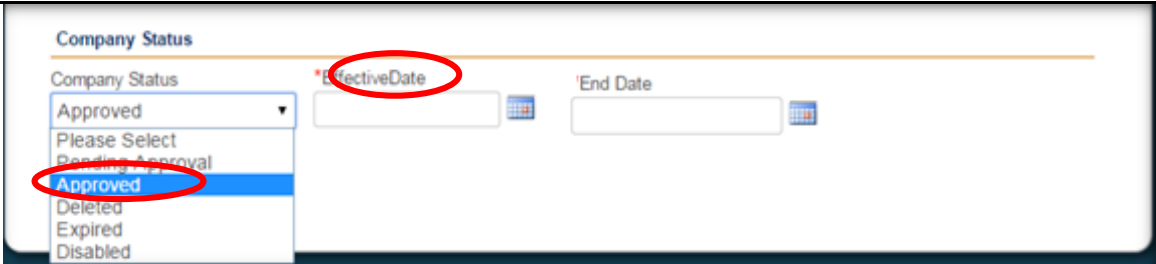
4. Double-click the downloaded item to open the exported file to view results.



ModelNumber	Manufacturer	Brand	ModelStatus	RegulatoryStatus	AddDate	Computer Room AC Type	Heat Energy Source	Voltage	Phase
PFH096A-L****	Liebert	Liebert	Approved	Non Federally-Regulated	1/11/2005	CRCU-A-CB: Computer Room Spli		208	3
V5070AM*****	Liebert	Liebert	Approved	Non Federally-Regulated	2/26/2009	CRC-A: Computer Room Air Cond		208	3
DAMA-1-512-CO	DATA AIRE, INC.	Data Aire	Approved	Non Federally-Regulated	11/1/2010	CRC-A: Computer Room Air Cond		230	1
V5070AS*****	Liebert	Liebert	Approved	Non Federally-Regulated	2/26/2009	CRC-A: Computer Room Air Cond		208	3
D5042WS*****	Liebert	Liebert	Approved	Non Federally-Regulated	10/17/2005	CSP-W: Computer Room Single P		208	3
GFAL-03534	DATA AIRE, INC.	Data Aire	Approved	Non Federally-Regulated	11/1/2010	CRC-A: Computer Room Air Cond		460	3
D5035AS*****	Liebert	Liebert	Approved	Non Federally-Regulated	1/11/2005	CRC-A: Computer Room Air Cond		208	3
GFWD-02834	DATA AIRE, INC.	Data Aire	Approved	Non Federally-Regulated	11/1/2010	CSP-W: Computer Room Single P		460	3
GTWU-01134	DATA AIRE, INC.	Data Aire	Approved	Non Federally-Regulated	11/1/2010	CSP-W: Computer Room Single P		460	3
GTWU-01132	DATA AIRE, INC.	Data Aire	Approved	Non Federally-Regulated	11/1/2010	CSP-W: Computer Room Single P		230	3
OHS-040-W-*	Stulz	Stulz	Approved	Non Federally-Regulated	5/6/2013	CSP-W: Computer Room Single P		240	1
D5035WD*****	Liebert	Liebert	Approved	Non Federally-Regulated	10/17/2005	CSP-W: Computer Room Single P		208	3
D5042WD*****	Liebert	Liebert	Approved	Non Federally-Regulated	10/17/2005	CSP-W: Computer Room Single P		208	3
PFH037A-LS***	Liebert	Liebert	Approved	Non Federally-Regulated	1/11/2005	CRCU-A-CB: Computer Room Spli		208	1
MCD26W***	Liebert	Liebert	Approved	Non Federally-Regulated	2/26/2009	CRCU-W-CB: Computer Room Spli		208	1
D5028AU*****	Liebert	Liebert	Approved	Non Federally-Regulated	1/11/2005	CRC-A: Computer Room Air Cond		208	3

## 4.8 Account Management (Internal)

### 4.8.1 Staff Account Approval

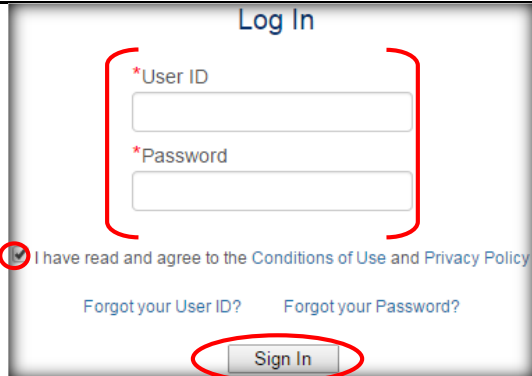

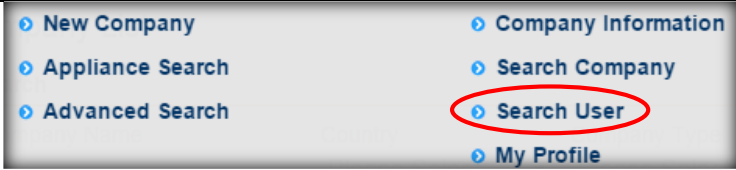
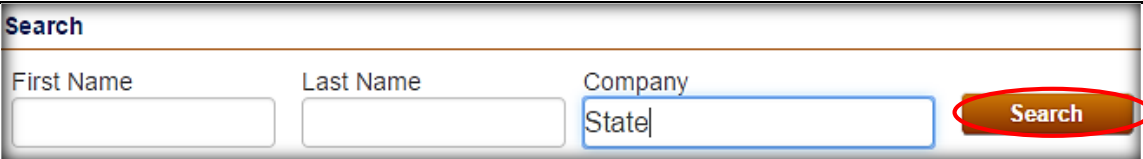
CEC staff must approve all new company account requests. Once a request has been submitted, staff may access the request through the Staff Home Page, view the new company information and either approve or reject the account request.

Steps to Complete Process																									
1. Enter Internal Staff User ID, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.																									
2. Click the "Account Approvals" tab on the home page.																									
																									
3. Click the "Select" link next to the company to be reviewed.																									
 <table border="1"><caption>Account Approval Requests</caption><thead><tr><th></th><th>Company</th><th>Country</th><th>Company WebSite(URL)</th></tr></thead><tbody><tr><td>Select</td><td>Mimi's Manufacturing Test 3rd Party</td><td>USA</td><td></td></tr><tr><td>Select</td><td>bhelft</td><td>USA</td><td></td></tr></tbody></table>			Company	Country	Company WebSite(URL)	Select	Mimi's Manufacturing Test 3rd Party	USA		Select	bhelft	USA													
	Company	Country	Company WebSite(URL)																						
Select	Mimi's Manufacturing Test 3rd Party	USA																							
Select	bhelft	USA																							
4. Review the company information and then select "Approved" from the Company Status dropdown and enter an "Effective Date" to approve the account request.																									
 <table border="1"><caption>Company Status</caption><tr><td>Company Status</td><td>*EffectiveDate</td><td>End Date</td></tr><tr><td>Approved</td><td></td><td></td></tr><tr><td>Please Select</td><td></td><td></td></tr><tr><td>Pending Approval</td><td></td><td></td></tr><tr><td>Approved</td><td></td><td></td></tr><tr><td>Deleted</td><td></td><td></td></tr><tr><td>Expired</td><td></td><td></td></tr><tr><td>Disabled</td><td></td><td></td></tr></table>		Company Status	*EffectiveDate	End Date	Approved			Please Select			Pending Approval			Approved			Deleted			Expired			Disabled		
Company Status	*EffectiveDate	End Date																							
Approved																									
Please Select																									
Pending Approval																									
Approved																									
Deleted																									
Expired																									
Disabled																									

5. Click the “Save” button in the top right corner of the screen.	
6. After clicking save, the system will display a message at the top of the screen to inform the user of the fact that the record was saved successfully.	
<b>Note:</b> The system will generate an automatic account confirmation email and send it to the new user along with a temporary password for them to login to the system.	

#### 4.8.2 Search for and Edit User Information

To edit a current user’s information, staff logs into the system and searches for a user, opens their existing user detail, makes changes and selects save.

Steps to Complete Process	
1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the “Sign In” button.	
2. Click the “ACCT MGMT” tab in the top menu.	
3. Click on the “Search User” link.	
4. Enter user information and then click the “Search” button.	

5. Click the “Select” link to the left of the user’s name to view the user information detail.

**Results**

	User Name	FirstName	LastName	Company	Role	Status
Select	ctuck	StateTestLab	User	State TestLab	External System Admin	Current Authorized User
Select	SUEORAZIL	SUE	ORAZIL	UNITED STATES THERMOAMP INC		User Added, but not an authorized user
Select	TimMarbach	Tim	Marbach	California State University Sacramento		User Added, but not an authorized user

Add

6. Make changes to user information as needed and then click the “Save” button in the top right corner.

**User Information** Save Cancel

Add or Update User

\*Last Name: ORAZIL \*First Name: SUE

\*Email Address: No Email \*Phone Number: 555-555-5555 Fax Number:

\*User ID: SUEORAZIL \*User Status: Inactive \*Effective Date: 01/08/2015

7. If needed, make changes to the user role and then click the “Save” button in the top right corner.

**User Account Information** Save Cancel

Assign Role

☐ Internal Staff ☐ External System Admin ☒ External Staff ☐ Super User

8. After clicking “Save”, the system will display a message stating that record was saved successfully.

Record saved successfully. Go Back

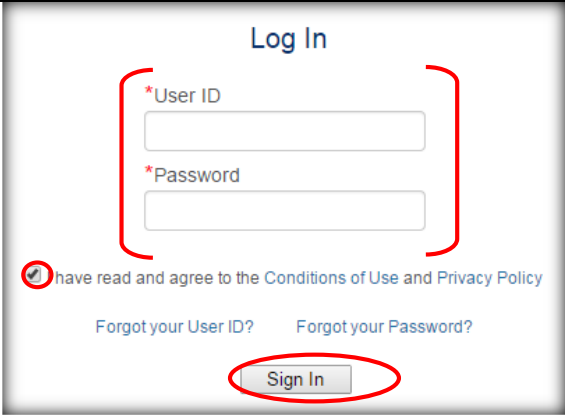


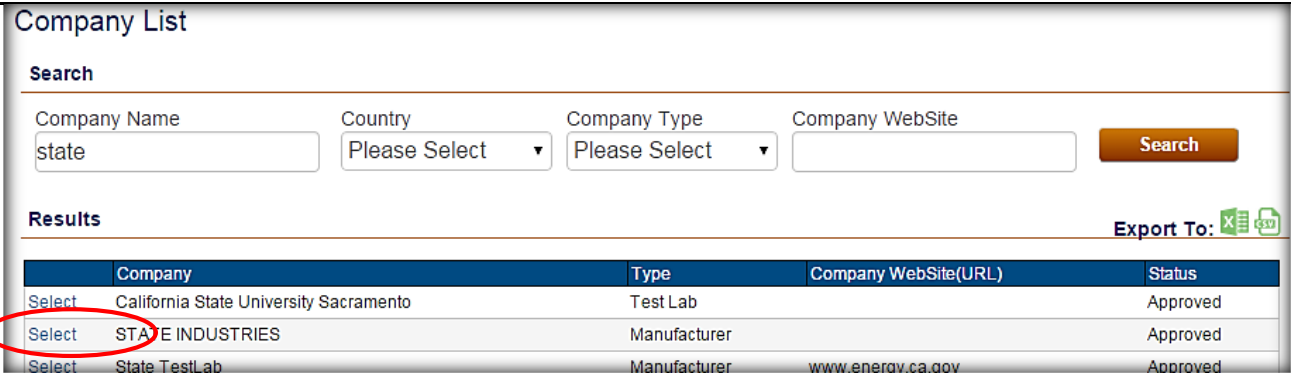
**User Account Information**

Assign Role

☐ Internal Staff ☐ External System Admin ☒ External Staff ☐ Super User

### 4.8.3 Add User to an Existing Company

Once the company account has been created, internal staff can add additional users to the account when requested. This is done by navigating to the account management tab to add users to the account. The system then sends an email to the new user notifying them of their account information and instructing them to login and complete the user registration the process.

Steps to Complete Process	
1. Enter the User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.	
2. Click on the "ACCT MGMT" tab at the top of the screen.	
3. Select the "Search Company" link.	
4. Search for the company and click the "Select" hyperlink.	
5. Scroll down to the Users grid and click the "Add" button to the bottom right.	

Company Information Detail

SaveCancel

Company Information

\*Company Name

State TestLab

Company Website (Follow Format: http://www.energy.ca.gov)

www.energy.ca.gov

Company Type

☒ Manufacturer
 ☒ Test Lab
 ☐ 3rd Party Certifier

Address

\*Country

USA

\*Address Line 1

1234 Anywhere You Want

Address Line 2

Next House Over

\*City

Roseville

\*USA State

Alabama

Foreign State/Province

\*ZIP/Postal Code

95678-0000

Users

Select	First Name	Last Name	Role
	StateTestLab	User	External System Admin

Add

Approved Appliance Types and Test Methods

6. Enter the new user information and then click the “Save” button in the top right corner.

User Information

SaveCancel

Add or Update User

Last Name

\*First Name

\*Email Address

\*Phone Number

Fax Number

\*User ID

\*User Status

Please Select

\*Effective Date

7. Assign the security role for the user by selecting the appropriate boxes and then click “Save” in the top right corner.

User Account Information

SaveCancel

Assign Role

☐ Internal Staff
 ☐ External System Admin
 ☒ External Staff
 ☐ Super User

8. The system will display a message stating that the record was saved successfully.
9. Click the “Go Back” button in the top right corner to return to the company information detail screen.

<div> <div>Record saved successfully.</div> <div>Go Back</div> </div> <div>User Account Information</div>
<p>10. Click the “Save” button in the top right corner of the User Information page.</p>
<div> <div>Company Information Detail</div> <div>Save Cancel</div> <div> <div>Company Information</div> <hr/> <div>*Company Name</div> <div>State TestLab</div> <div>Company Website (Follow Format: http://www.energy.ca.gov)</div> <div>www.energy.ca.gov</div> </div> </div>
<p>Note: Once saved, the system will display a message at the top of the screen and will send the new user their ID and a temporary password via email.</p> <div> <div>Company Information Detail</div> <div>Record saved successfully.</div> </div>

#### 4.9 Staff Entry of Submittal Information

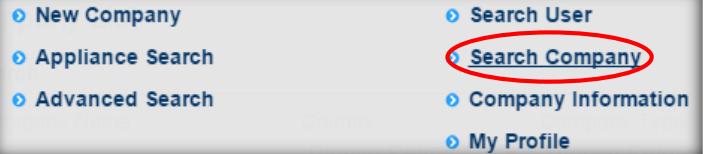
##### 4.9.1 Search and Edit Company Information

To search for and edit company information, follow the steps below:

Steps to Complete Process	
1. Enter staff User ID and Password, and then click the “Sign In” button.	
2. Click on the “ACCT MGMT” tab at the top of the screen.	

## Steps to Complete Process

3. Select the "Search Company" link.



4. Enter search criteria and then click the "Search" button.

**Company List**

**Search**

Company Name:  Country:  Company Type:

Company Status:  Start Date:  End Date:

**Search** (button highlighted with a red circle)

5. Click the "Select" link to the left of the desired Company.

**Results** Export To:

	Company	Type	Company WebSite(URL)	Status
<a href="#">Select</a>	California State University Sacramento	Test Lab		Approved
<a href="#">Select</a>	STATE INDUSTRIES	Manufacturer		Approved
<a href="#">Select</a> (highlighted with a red circle)	State TestLab	Manufacturer	www.energy.ca.gov	Approved
<a href="#">Select</a>	UNITED STATES THERMOAMP INC	Manufacturer		Approved

**Add** (button)

6. Enter company information and then click the "Save" button in the top right corner of the screen.

## Steps to Complete Process

Company Information Detail

**Save** **Cancel**

**Company Information**

\*Company Name  
State TestLab

Company Website (Follow Format: http://www.energy.ca.gov)  
www.energy.ca.gov

**Company Type**

☒ Manufacturer ☐ Test Lab ☐ 3rd Party Certifier

**Address**

\*Country  
USA

\*Address Line 1  
1234 Anywhere You Want

Address Line 2  
Next House Over

\*City  
Roseville

\*USA States  
Alabama

Foreign State/Province

\*ZIP/Postal Code  
95678

**Users**

Select	First Name	Last Name	Role
<input type="checkbox"/>	StateTestLab	User	External System Admin

**Add**

**Approved Appliance Types and Test Methods**

**Company Status**

Company Status  
Approved

\*EffectiveDate  
01/01/2015

\*End Date  
01/14/2020

### 4.9.2 Add a New Company

If the company is new and does not have an existing account with the CEC, staff users will follow these steps before beginning an approval application:

## Steps to Complete Process

1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.

Log In

\*User ID

\*Password

☒ I have read and agree to the Conditions of Use and Privacy Policy

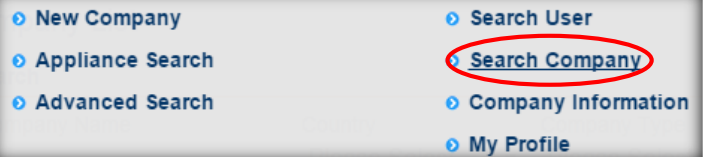
[Forgot your User ID?](#) [Forgot your Password?](#)

**Sign In**

2. Click on the "ACCT MGMT" tab at the top of the screen.

HOME APPLICATIONS VALIDATIONS **ACCT MGMT**

3. Select the "Search Company" link.



4. Enter the name of the company in the "Company Name" search field and then click the "Search" button on the right of the screen.

### Company List

#### Search

Company Name <input type="text"/>	Country Please Select <input type="button" value="v"/>	Company Type Manufacturer <input type="button" value="v"/>
Company Status Approved <input type="button" value="v"/>	Start Date <input type="text"/> <input type="button" value="Calendar"/>	End Date <input type="text"/> <input type="button" value="Calendar"/>
		<input type="button" value="Search"/>

5. If the company does not display, then click the "Add" button in the bottom right of the screen.

Results					Export To: <input type="button" value="XLS"/> <input type="button" value="CSV"/>
	Company	Type	Company WebSite(URL)	Status	
Select	California State University Sacramento	Test Lab		Approved	
Select	STATE INDUSTRIES	Manufacturer		Approved	
Select	State TestLab	Manufacturer	www.energy.ca.gov	Approved	
Select	UNITED STATES THERMOAMP INC	Manufacturer		Approved	
					<input type="button" value="Add"/>

6. Enter new company information into the provided fields and then click the "Create User" button in the bottom right corner of the screen.

Note: A company cannot be created without also creating a user associated to the company.

## Create new company

### Company Information

\*Company Name

Company Website (Follow Format: <http://www.energy.ca.gov>)

### Company Type

☐ Manufacturer ☐ Test Lab ☐ 3rd Party Certifier

### Address

\*Country

\*Address Line 1

Address Line 2

\*City

\*USA States

Foreign State/Province

\*ZIP/Postal Code

Create User

7. Enter the user information and click "Save".

## Create New User

Save

### Add User

\*Last Name

\*First Name

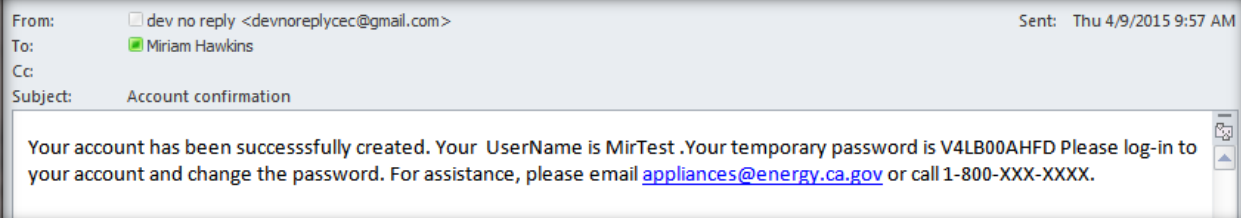
\*Email Address

Phone Number

Fax Number

\*User ID

NOTE: Once a user is created they will be emailed a temporary password and User ID. They will then need to complete the new user account creation process.



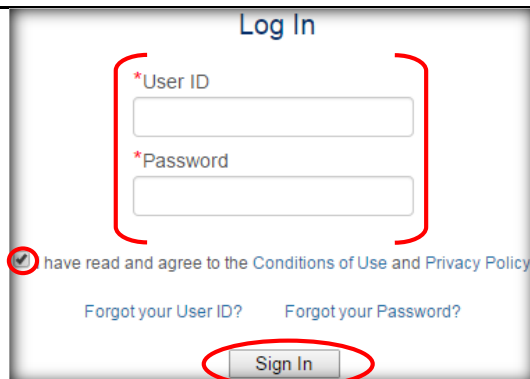
### 4.9.3 Entry of 3<sup>rd</sup> Party Application Information

In this scenario, CEC staff enters new application information on behalf of the company by selecting the type of application and entering company information.

**Note: The company and contact information need to exist in the system before the application can be completed. To search for and add a new company, please see section 4.9.1 and 4.9.2.**

#### Steps to Complete Process

1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the “Sign In” button.



The screenshot shows a 'Log In' form. It has two input fields: '\*User ID' and '\*Password'. Below these is a checkbox with the text 'I have read and agree to the Conditions of Use and Privacy Policy'. At the bottom are two links: 'Forgot your User ID?' and 'Forgot your Password?'. A 'Sign In' button is at the bottom right, circled in red.

2. Click the “Applications” tab at the top of the screen.



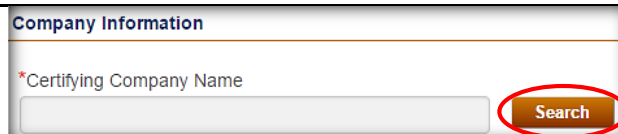
The screenshot shows a navigation bar with two tabs: 'HOME' and 'APPLICATIONS'. The 'APPLICATIONS' tab is highlighted and circled in red.

3. Click on the “Third Party Certifier Application” link.



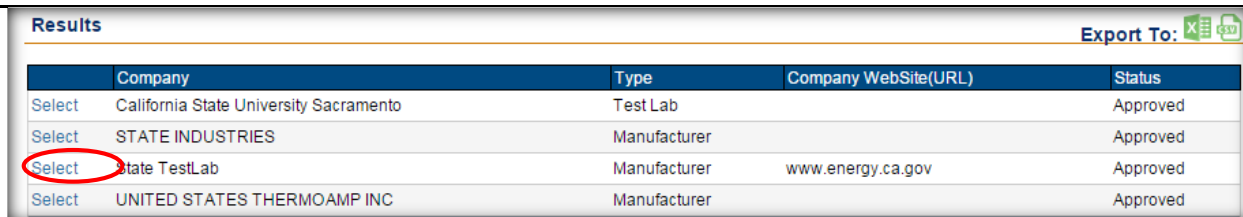
The screenshot shows a list of application types: 'Submit Appliance Data', 'Delegation of Authority Application', 'Third Party Certifier Application', and 'Test Laboratory Application'. The 'Third Party Certifier Application' link is circled in red.

4. Click the “Search” button in the Company Information section to search through Third Party Certifiers.



The screenshot shows a 'Company Information' search form. It has a text input field for '\*Certifying Company Name' and a 'Search' button, which is circled in red.

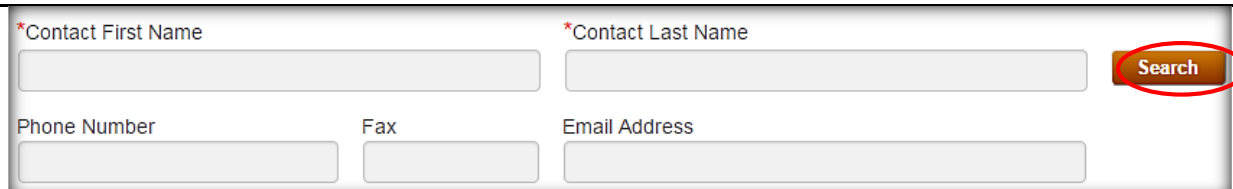
5. Select name of company from the company list by clicking the “Select” link to the left of the Company name.



The screenshot shows a 'Results' table with columns: Company, Type, Company WebSite(URL), and Status. There is an 'Export To:' button with icons for Excel and PDF. The table lists four companies, and the 'Select' link for 'State TestLab' is circled in red.

	Company	Type	Company WebSite(URL)	Status
Select	California State University Sacramento	Test Lab		Approved
Select	STATE INDUSTRIES	Manufacturer		Approved
Select	State TestLab	Manufacturer	www.energy.ca.gov	Approved
Select	UNITED STATES THERMOAMP INC	Manufacturer		Approved

6. Click the “Search” button in the Contact section to search for the Contact Person and their information.



The screenshot shows a 'Contact' search form. It has input fields for '\*Contact First Name', '\*Contact Last Name', 'Phone Number', 'Fax', and 'Email Address'. A 'Search' button is at the bottom right, circled in red.

7. Select the Contact by clicking on the “Select” link to the left of the Contact User Name.

Results						
	User Name	FirstName	LastName	Company	Role	Status
Select	stuck	StateTestLab	User	State TestLab	External System Admin	Current Authorized User

8. Place a checkmark next to the applicable Certifier Type(s).

#### Certifier Type

- ☒ Appliance Manufacturer Trade Association
- ☒ Appliance Test Laboratory
- ☐ Appliance Brand Holder or Importer
- ☒ Manufacturer
- ☐ Other

9. Mark the Declaration checkboxes and enter the appropriate Name, Title and Declaration Date.

#### Declaration

- ☒ It has read and understood all the appliance regulation provisions of California Code of Regulations, federal law, and all other documents applicable to each category for which the third party will file information;
- ☒ It is financially and technically capable of complying with all of the applicable requirements;
- ☒ I declare under penalty of perjury under the laws of the State of California that: The foregoing is true, correct, complete, accurate, and in compliance with all applicable provisions of California Code of Regulations, title 20, sections 1601-1608 inclusive and all applicable provisions of Sections 10-152 of Title 24 of the California Code of Regulations; and I am authorized to make this declaration, and to file this application, on behalf of State TestLab

\*Name

\*Title

\*Date



10. Select the Application Status from the dropdown menu. Enter the Received Date and Effective Date.

#### Application Status

The third party certifier shown above is hereby approved for certifying on behalf of appliance manufacturers in compliance with the requirements of the Appliance Efficiency Regulations from the date shown below. It is the responsibility of the third party certifier to update the information on this form should it change. The Commission may audit the content provided on this form to ensure accurate and updated information and, upon a finding of non-compliance with an applicable provision of the above referenced Sections, the Executive Director may suspend a third party from making filings, allow continued filings under specific conditions, or remove affected appliances from the database.

\*Application Status

Submitted ▼

\*EffectiveDate

04/09/2015



\*Active ENF File

No

Assigned User

mved ▼

\*Received Date

04/01/2015



Expiration Date

11. Click the “Submit” button at the top right corner of the screen.

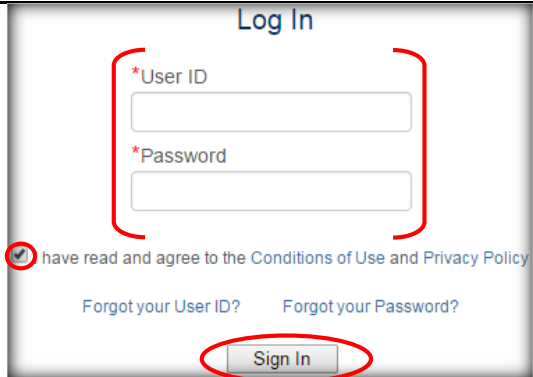
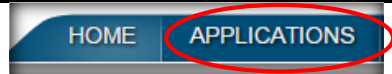

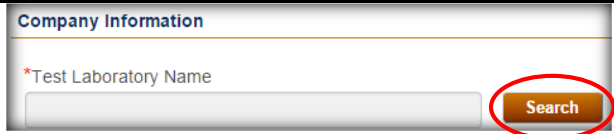
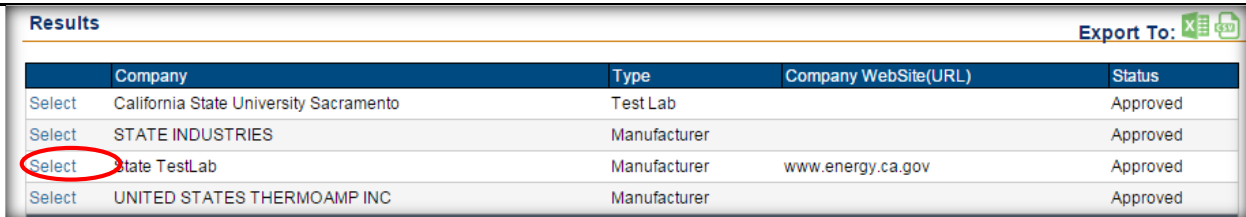
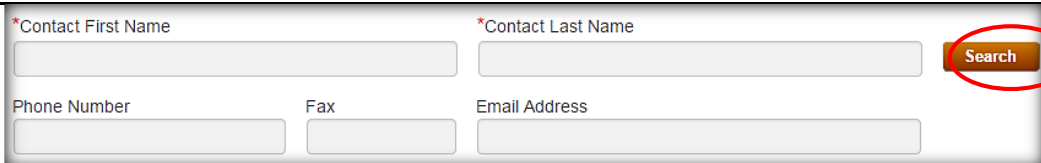
Submit

Cancel

Note: The submitted application should now be viewable in the Staff Home Page and the Company’s Home Page.

#### 4.9.4 Entry of Test Laboratory Application Information

**Note:** The company and contact information need to exist in the system before the application can be completed. To search for and enter a new company, please see section 4.9.1 and 4.9.2.

Steps to Complete Process																										
1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.																										
2. Click the "Applications" tab at the top of the screen.																										
3. Click on the "Test Laboratory Application" link.																										
4. Click "Search" button to search through Test Laboratories.																										
5. Select name of company from the company list by clicking the "Select" link to the left of the Company name.	 <table border="1"><thead><tr><th></th><th>Company</th><th>Type</th><th>Company WebSite(URL)</th><th>Status</th></tr></thead><tbody><tr><td>Select</td><td>California State University Sacramento</td><td>Test Lab</td><td></td><td>Approved</td></tr><tr><td>Select</td><td>STATE INDUSTRIES</td><td>Manufacturer</td><td></td><td>Approved</td></tr><tr><td>Select</td><td>State TestLab</td><td>Manufacturer</td><td>www.energy.ca.gov</td><td>Approved</td></tr><tr><td>Select</td><td>UNITED STATES THERMOAMP INC</td><td>Manufacturer</td><td></td><td>Approved</td></tr></tbody></table>		Company	Type	Company WebSite(URL)	Status	Select	California State University Sacramento	Test Lab		Approved	Select	STATE INDUSTRIES	Manufacturer		Approved	Select	State TestLab	Manufacturer	www.energy.ca.gov	Approved	Select	UNITED STATES THERMOAMP INC	Manufacturer		Approved
	Company	Type	Company WebSite(URL)	Status																						
Select	California State University Sacramento	Test Lab		Approved																						
Select	STATE INDUSTRIES	Manufacturer		Approved																						
Select	State TestLab	Manufacturer	www.energy.ca.gov	Approved																						
Select	UNITED STATES THERMOAMP INC	Manufacturer		Approved																						
6. Click the "Search" button in the Contact section to search for the Contact Person and their information.																										
7. Click the "Search" button in the Contact section to search for the Contact Person and their information.																										

Results						
	User Name	FirstName	LastName	Company	Role	Status
Select	ctuck	StateTestLab	User	State TestLab	External System Admin	Current Authorized User

8. Click the add button to the bottom right of the Appliance Type and Method Selection section grid.



9. Select the Appliance Category and Type from the dropdown menus and then place a checkmark next to the applicable Test Methods.

**ApplianceType/TestMethod Selection**

**Select Appliance**

Select Category: Electronics  
Select Appliance Type: Consumer Audio & Video

**Test Methods**

☒ IEC 62087:2002(E)

10. Click the “Next” button at the bottom right of the screen.



11. Mark the Declaration checkboxes and enter the appropriate Name, Title and Date.

**Declaration**

☒ It has conducted tests using the applicable test method(s) specified on the first page of this application within the previous 12 months;

☒ It agrees to and does interpret and apply the applicable test method set forth in Section 1604 precisely as written;

☒ It has, and keeps properly calibrated and maintained, all equipment, material, and facilities necessary to apply the applicable test method precisely as written;

☒ It agrees to and does maintain copies of all test reports, and provided any such report to the Executive Director on request, for all basic models that are still in commercial production; and

☒ It agrees to and does allow the Executive Director to witness any test of such an appliance on request, up to once per calendar year for each basic model.

☒ I declare under penalty of perjury of the laws of the State of California, that: All the information in this statement is true, complete, accurate, and in compliance with all applicable provisions of Sections 1601-1608 of Title 20 of the California Code of Regulations; and I am authorized to make this declaration, and to file this application, on behalf of State TestLab

☒ It agrees to, and will follow, all applicable provisions of the California Energy Commission's Appliance Regulations (Section 1601-1608 of Title 20 of the California Code of Regulations), in carrying out all testing pursuant to this application.

\*Name:  \*Title:  \*Date:

12. Select the Application Status from the dropdown menu. Enter the Received Date and Effective Date.

**Application Status**

\*Application Status: Submitted  
\*EffectiveDate: 04/09/2015  
\*Active ENF File: No

Assigned User: Please Select  
\*Received Date: 04/09/2015  
Expiration Date:

**Send Email**

13. Scroll to the Documents section of the application page and click on the “Upload Documents” to the bottom right of the documents grid.

The screenshot shows a section titled "Documents". Below the title is a table with two columns: "Document Name" and "Created Date". The table contains the text "No records found". At the bottom right of the section, there is a button labeled "Upload Documents" which is circled in red.

14. Click the “Add” button at the bottom right corner of the Document List page.

The screenshot shows a section titled "Document List". Below the title is a table with two columns: "Document Name" and "Created Date". The table contains the text "No records found". At the bottom right of the section, there are two buttons: "Add" and "Next". The "Add" button is circled in red.

15. Click the “Choose File” button to select a file to upload.
- Note: Once uploaded, the name of the file will appear in the field.

The screenshot shows a section titled "Upload Document". Below the title is a button labeled "Choose File" which is circled in red. To the right of the button, the text "No file chosen" is displayed.

16. Click “Next” to view the document in the document list

The screenshot shows a section titled "Upload Document". Below the title is a button labeled "Choose File" and the text "CAV firstlevel demo.xlsx". At the bottom right of the section, there are two buttons: "Previous" and "Next". The "Next" button is circled in red.

17. Click “Next” to return to submitting the application.

The screenshot shows a section titled "Document List". Below the title is a table with two columns: "Document Name" and "Created Date". The table contains the following data:

Document Name	Created Date
CAV firstlevel demo_04092015104119.xlsx	04/09/2015

At the bottom right of the section, there are two buttons: "Add" and "Next". The "Next" button is circled in red.

18. Click the “Submit” button at the top right corner of the screen.

## California Appliance Efficiency Program 2015 Test Laboratory Application

**Submit** **Cancel**

### Instructions

- Please allow at least four weeks during the heavy renewal period (November-March) before contacting us regarding your application.

### Company Information

19. Once submitted, the system will display a message at the top of the screen stating that the record was saved successfully.

## California Appliance Efficiency Program 2015 Test Laboratory Application

Record saved successfully. The application number is: APP109

Note: The submitted application should now be viewable in the Staff Home Page and the Company's Home Page.

### Home Page

Submittals

**Applications**

Delegations

Notifications

Account Approvals

Application #

Manufacturer Name

Application Status

Assigned To

Submitted

Please Select

Received From

Received To

Order By First Field

Order By Second Field

Received Date

Please Select

Search

Results 54 record(s) found

Export To: Excel CSV

### 4.9.5 Entry of Appliance Data

Follow the steps below to have staff users submit appliance data on behalf of a company.

### Steps to Complete Process

1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.

Log In

\*User ID

\*Password


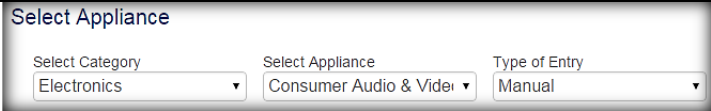

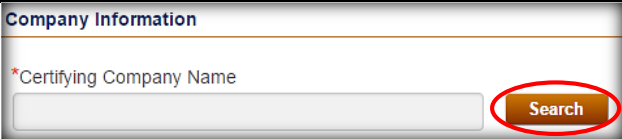
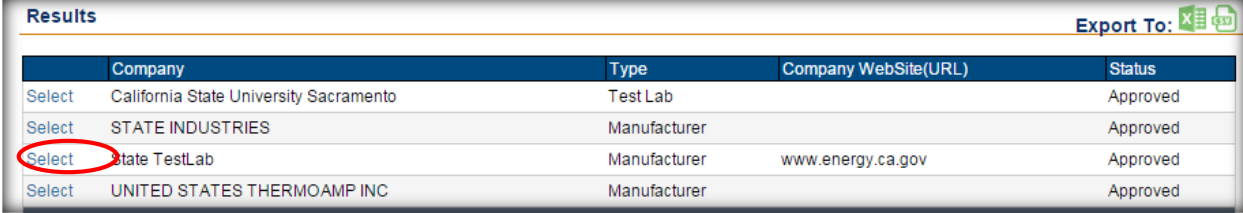
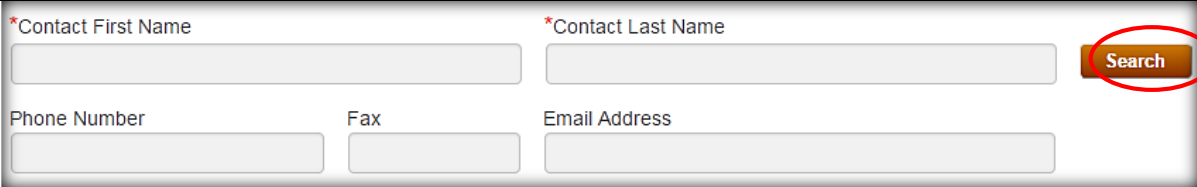
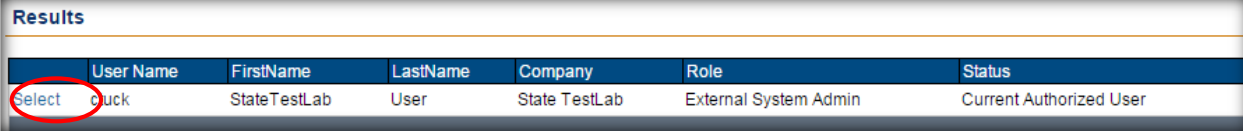
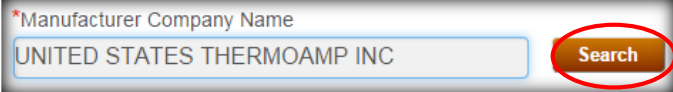
☒ have read and agree to the [Conditions of Use and Privacy Policy](#)



[Forgot your User ID?](#)
[Forgot your Password?](#)

Sign In

2. Click on the "Applications" tab at the top of the screen.

HOME **APPLICATIONS** VALIDATIONS ACCT MGMT

3. Click on the "Submit Appliance Data" link.	
4. Select the Appliance Category, the Appliance and the Type of Entry. If "Manual" is selected, the user will have to manually enter appliance data, if "Upload" is selected the system will prompt the user to upload an excel file.	
5. Click the "Next" button on the right side of the screen.	
6. On the appliance declaration page, click the "Search" button to find the company for whom you are submitting an application.	
7. Select name of company from the company list by clicking the "Select" link to the left of the Company name.	
8. Click the "Search" button in the Contact section to search for the Contact Person and their information.	
9. Select name of company from the company list by clicking the "Select" link to the left of the Company name.	
10. Click the "Search" button in the Manufacturer section to add a manufacturer different from the certifying party.	
11. Click the "Select" link next to the name of the Manufacturer.	

Results					Export To:  
	Company	Type	Company WebSite(URL)	Status	
Select	California State University Sacramento			Approved	
Select	STATE INDUSTRIES	Manufacturer		Approved	
Select	State TestLab	Manufacturer	www.energy.ca.gov	Approved	
Select	UNITED STATES THERMOAMP INC	Manufacturer		Approved	

12. Click “Add” below the Test Lab grid to add a CEC approved Test Lab

#### Test Laboratory

Name	Test Methods
<input type="checkbox"/> State TestLab	IEC 62087:2002(E)

13. Click the “Search” button next to the Test Laboratory Name field.






#### Search Approved Test Labs

Test Laboratory Name



14. Enter search criteria in the Company Search section and then click “Search” to display a list of Test Labs to select from.

#### Company List

##### Search

Company Name <input type="text"/>	Country Please Select 	Company Type Manufacturer 
Company Status Approved 	Start Date <input type="text"/> 	End Date <input type="text"/> 

15. Click the “Select” link to the left of the desired Test Lab.

Results					Export To:  
	Company	Type	Company WebSite(URL)	Status	
Select	California State University Sacramento	Test Lab		Approved	
Select	STATE INDUSTRIES			Approved	
Select	State TestLab		www.energy.ca.gov	Approved	
Select	UNITED STATES THERMOAMP INC			Approved	

16. Mark the applicable test methods.

#### Test Methods Performed

☐ IEC 62087:2002(E)

17. Click the “Next” button in the bottom right corner of the screen.

Next

18. Enter the appropriate Name, Title and Date and then click the “Next” button in the bottom right corner.

#### Declaration

1. All the information in this statement is true, complete, accurate, and in compliance with all applicable provisions of Sections 1601 – 1608 of Title 20 of the California Code of Regulations.
2. Units of each basic model of appliance for which certification is requested have been tested in accordance with all applicable requirements of Sections 1603 – 1604 of Title 20 of the California Code of Regulations.
3. Section 1606(g) of Title 20 of the California Code of Regulations have been and are being complied with.
4. All units manufactured, distributed or otherwise intended for sale within the State of California have been and are being marked as required by Section 1607 of Title 20 of the California Code of Regulations.
5. The (i) manufacturer's name or brand name or trademark; (ii) model number; and (iii) date of manufacture are permanently, legibly, and conspicuously displayed on an accessible place on each unit.
6. The appliance complies with the applicable energy efficiency, energy consumption, energy design, water efficiency, water consumption, and water design standards in Sections 1605.1, 1605.2, and 1605.3 of Title 20 of the California Code of Regulations.

\*Name

\*Title

\*Date



Previous

Next

Note: If “Manual” entry was selected the system will display an appliance detail page- refer to Submit Appliance Data – Manual Entry process in 4.4.2.1

#### AudioVideo

Save Cancel

\*Action

Add

\*Model

Manufacturer

Add Date

Brand

Please Select

New Brand

\*Regulatory Status

Please Select

Audio Video Type

Please Select

Standby Power Usage (Watts)

Standby Power Usage (Watts) Std

On Mode Power Usage (Watts)

On Mode Power Usage (Watts) Std

Note: If “Upload” entry was selected the system will display a document upload page, refer to the Submit Appliance Data – Excel Upload process in 4.4.2.2

#### Upload Document

Choose File No file chosen

Previous Next

NOTE: Model data must be processed and added to the database prior to submitting a change or delete request.

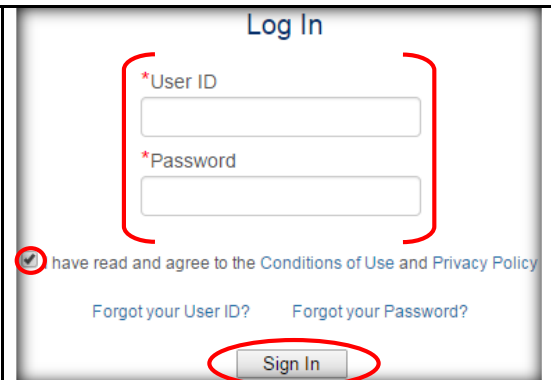
## 4.10 Staff Processing of Submittals & Applications

### 4.10.1 3<sup>rd</sup> Party Approval Applications

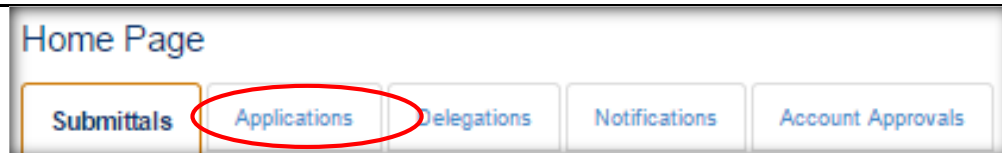
Follow the steps below for staff users to process a 3<sup>rd</sup> Party Certifier Application. Once the application is processed, the system will automatically send an email to the company, once the status is updated and saved.

#### Steps to Complete Process

1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the “Sign In” button.



2. From the staff homepage, click the “Applications” tab to review a list of applications that need processing.



3. Click the “Select” link next to the application to review.

Inbox Applications						
	Application#	Type	Company	Submit Date	Expiration Date	Status
Select	APP63	Test Lab Application	AmitTestExternal	01/30/2015		Submitted
Select	APP57	Test Lab Application	testAmitAnother	01/29/2015		Submitted
Select	APP56	3rd Party Certifier Application	ABER HOT TUB MFG	01/28/2015		Submitted
Select	APP51	3rd Party Certifier Application	testAmitAnother	01/21/2015		Submitted
Select	APP44	3rd Party Certifier Application	AmitTestExternal	01/20/2015	12/31/2015	Submitted

4. Review the Application information and then scroll to the bottom of the application and select the appropriate status from the Application Status dropdown menu.

## California Appliance Efficiency Program 2015 Third Party Certifier Application

Save

Cancel

### Instructions

- Please allow at least four weeks during the heavy renewal period (November-March) before contacting us regarding your application.

### Company Information

\*Certifying Company Name

testAmitAnother

Search

Address 1

addr1

Address 2

City

city

State

ZIP/Postal Code

95747

Country

USA

Company Website (URL)

\*Contact First Name

Super

\*Contact Last Name

User

Search

Phone Number

Fax

Email Address

asheldon@trinitytg.com

### Certifier Type

- ☐ Appliance Manufacturer Trade Association
- ☐ Appliance Test Laboratory
- ☐ Appliance Brand Holder or Importer
- ☒ Manufacturer
- ☐ Other

### Documents

Document Name	Created Date
No records found	

Upload Documents

### Declaration

- ☐ It has read and understood all the appliance regulation provisions of California Code of Regulations, federal law, and all other documents applicable to each category for which the third party will file information;
- ☐ It is financially and technically capable of complying with all of the applicable requirements;
- ☒ I declare under penalty of perjury under the laws of the State of California that: The foregoing is true, correct, complete, accurate, and in compliance with all applicable provisions of California Code of Regulations, title 20, sections 1601-1608 inclusive and all applicable provisions of Sections 10-152 of Title 24 of the California Code of Regulations; and I am authorized to make this declaration, and to file this application, on behalf of testAmitAnother

\*Name

test

\*Title

title

\*Date

01/21/2015

### Application Status

The third party certifier shown above is hereby approved for certifying on behalf of appliance manufacturers in compliance with the requirements of the Appliance Efficiency Regulations from the date shown below. It is the responsibility of the third party certifier to update the information on this form should it change. The Commission may audit the content provided on this form to ensure accurate and updated information and, upon a finding of non-compliance with an applicable provision of the above referenced Sections, the Executive Director may suspend a third party from making filings, allow continued filings under specific conditions, or remove affected appliances from the database.

Application Status

Submitted

\*EffectiveDate

01/21/2015

\*Active ENF File

No

Assigned User

Please Select

\*Received Date

01/21/2015

Expiration Date

- Click the "Save" button in the top right corner to save changes to the application.

Save

Cancel

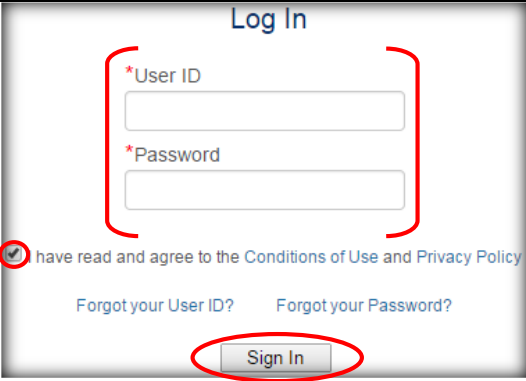
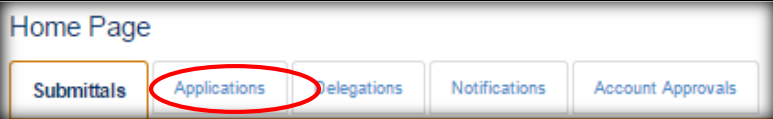
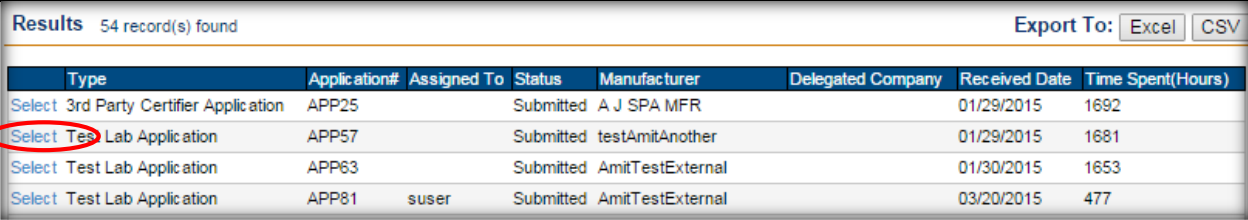
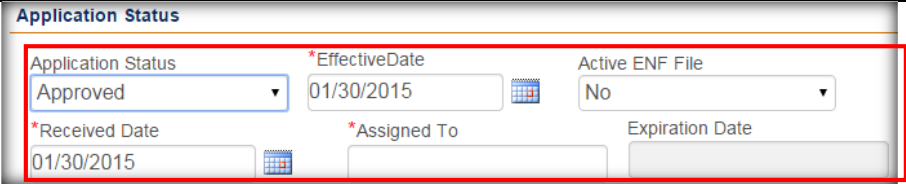

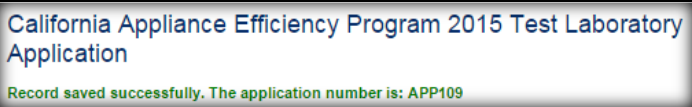
- Once saved, the system will display a message stating that the record was saved successfully.

California Appliance Efficiency Program 2015 Third Party Certifier Application

Record saved successfully. The application number is: APP51

#### 4.10.2 Test Lab Approval Applications

Follow the steps below for staff users to process a Test Laboratory Application. Once the application is processed, the system will automatically send an email to the company, once the status is updated and saved.

Steps to Complete Process																																									
1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.	 <p>The screenshot shows a 'Log In' form with fields for '*User ID' and '*Password'. Below these fields is a checkbox labeled 'I have read and agree to the Conditions of Use and Privacy Policy'. At the bottom are links for 'Forgot your User ID?' and 'Forgot your Password?', and a 'Sign In' button.</p>																																								
2. Click the "Applications" tab to review a list of applications that need processing.	 <p>The screenshot shows the 'Home Page' with navigation tabs: 'Submittals', 'Applications' (highlighted with a red circle), 'Delegations', 'Notifications', and 'Account Approvals'.</p>																																								
3. Click "Select" next to the application in order to view application details.	 <p>The screenshot shows a table of application results. The first column contains 'Select' buttons, with the second one highlighted by a red circle. The table has columns: Type, Application#, Assigned To, Status, Manufacturer, Delegated Company, Received Date, and Time Spent(Hours).</p> <table border="1"><thead><tr><th>Type</th><th>Application#</th><th>Assigned To</th><th>Status</th><th>Manufacturer</th><th>Delegated Company</th><th>Received Date</th><th>Time Spent(Hours)</th></tr></thead><tbody><tr><td>Select 3rd Party Certifier Application</td><td>APP25</td><td></td><td>Submitted</td><td>A J SPA MFR</td><td></td><td>01/29/2015</td><td>1692</td></tr><tr><td>Select Test Lab Application</td><td>APP57</td><td></td><td>Submitted</td><td>testAmitAnother</td><td></td><td>01/29/2015</td><td>1681</td></tr><tr><td>Select Test Lab Application</td><td>APP63</td><td></td><td>Submitted</td><td>AmitTestExternal</td><td></td><td>01/30/2015</td><td>1653</td></tr><tr><td>Select Test Lab Application</td><td>APP81</td><td>suser</td><td>Submitted</td><td>AmitTestExternal</td><td></td><td>03/20/2015</td><td>477</td></tr></tbody></table>	Type	Application#	Assigned To	Status	Manufacturer	Delegated Company	Received Date	Time Spent(Hours)	Select 3rd Party Certifier Application	APP25		Submitted	A J SPA MFR		01/29/2015	1692	Select Test Lab Application	APP57		Submitted	testAmitAnother		01/29/2015	1681	Select Test Lab Application	APP63		Submitted	AmitTestExternal		01/30/2015	1653	Select Test Lab Application	APP81	suser	Submitted	AmitTestExternal		03/20/2015	477
Type	Application#	Assigned To	Status	Manufacturer	Delegated Company	Received Date	Time Spent(Hours)																																		
Select 3rd Party Certifier Application	APP25		Submitted	A J SPA MFR		01/29/2015	1692																																		
Select Test Lab Application	APP57		Submitted	testAmitAnother		01/29/2015	1681																																		
Select Test Lab Application	APP63		Submitted	AmitTestExternal		01/30/2015	1653																																		
Select Test Lab Application	APP81	suser	Submitted	AmitTestExternal		03/20/2015	477																																		
4. Review the Application information and then scroll to the bottom of the application and select the appropriate status from the Application Status dropdown menu.	 <p>The screenshot shows the 'Application Status' form. The 'Application Status' dropdown menu is highlighted with a red circle. Other fields include '*EffectiveDate' (01/30/2015), 'Active ENF File' (No), '*Received Date' (01/30/2015), '*Assigned To', and 'Expiration Date'.</p>																																								
5. Click the "Save" button in the top right corner to save changes to the application.	 <p>The screenshot shows two buttons: 'Save' (highlighted with a red circle) and 'Cancel'.</p>																																								
6. Once saved, the system will display a message stating that the record was saved successfully.	 <p>The screenshot shows a success message: 'Record saved successfully. The application number is: APP109'.</p>																																								

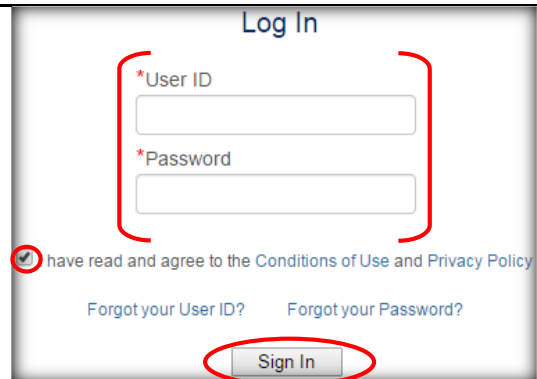
### 4.10.3 Appliance Data

Staff will access data submittals from the Staff Home page. The submittal detail page will display a grid of all passed models and a grid of models that have failed validation. Staff will review the submittal information and update the status accordingly (e.g. Processed/Re-Validate). If all of the models have passed validation, the appliance data notification email will automatically be sent by the system when the status is updated and saved. If there is at least one model that failed, staff will need to generate, review, edit and send the appliance data notification email.

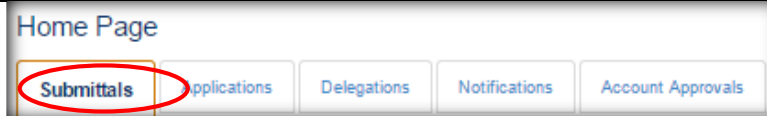
For submittals with a status of “re-validate”, the system will re-run 2<sup>nd</sup> stage validation rules and display the results in the Inbox on the Staff home page for processing.

#### Steps to Complete Process

1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the “Sign In” button.



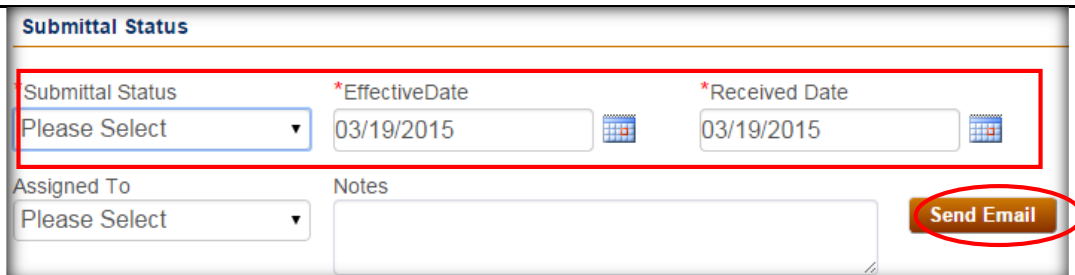
2. From the home page, click the “Submittals” tab to review a list of appliance data submittals that need processing.

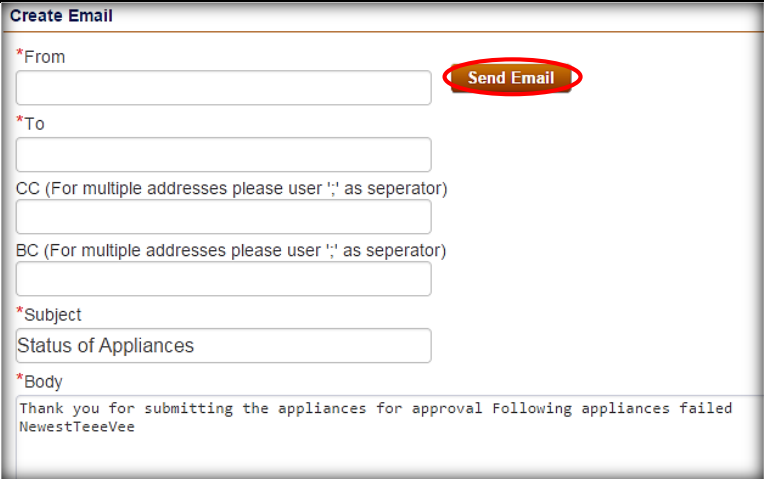





3. Click “Select” next to the application in order to view application details.

Inbox Submittals							
	Submittal#	Appliance Type	Manufacturer	Status	Submitted By	Assigned To	Date Submitted
Select	SUB461	Transformers		Pending Review	asdf		03/19/2015
Select	SUB448	Televisions		Pending Review	TeeeVeee		03/19/2015
Select	SUB423	LargeBatteryCharger		Pending Review	adf		03/16/2015

4. Review the Submittal information and then scroll to the bottom of the Submittal screen. Select the appropriate status from the Submittal Status dropdown menu and enter the Effective Date and other applicable information.



<p>5. Users can draft the email to the company, citing reasons why the submittal was rejected and then click the “Send Email” button.</p>	
<p>6. Click the “Go Back” button in the top right corner.</p>	
<p>7. Click the “Save” button in the top right corner to save changes to the application.</p>	
<p>8. Once saved, the system will display a message stating that the record was saved successfully.</p>	

## 4.11 Validation Rules

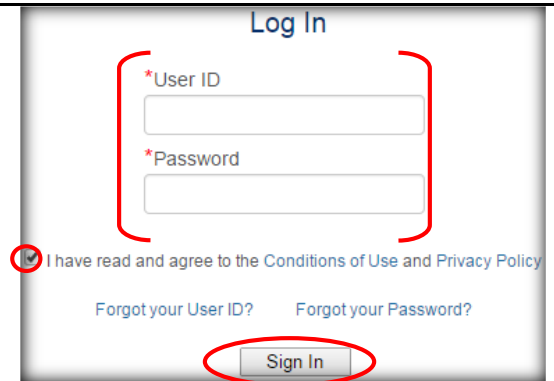
The business rule engine is accessed by CEC staff who have obtained specific security privileges to add and edit validation rules. Most of these changes can be made via the user interface, but for more complex changes, the IT department must be contacted (this will be described in further detail in upcoming sections). To make simple changes to rules such as decision order, a change in a value or operator for a specific rule, complete the steps outlined below.

### 4.11.1 View Decision Order

The Decision Order for an appliance type indicates the way the order in which the system reads each column of appliance data entered into the system. MAEDBS utilizes decision order to determine which combination of data matches a specific validation rule. This aspect of the Business Rule Engine will rarely need to be updated, only in cases where there are additional columns added to validation rules, new policy or an updated standard that needs to be used in matching appliance data to a specific validation rule.

## Steps to Complete Process

1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.



Log In

\*User ID

\*Password

☒ I have read and agree to the Conditions of Use and Privacy Policy

[Forgot your User ID?](#) [Forgot your Password?](#)

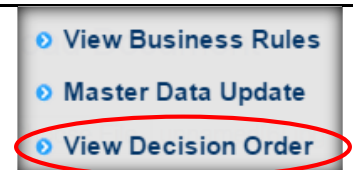
Sign In

2. Click on the "Validations" tab in the top menu.



HOME APPLICATIONS **VALIDATIONS**

3. Click "View Decision Order"

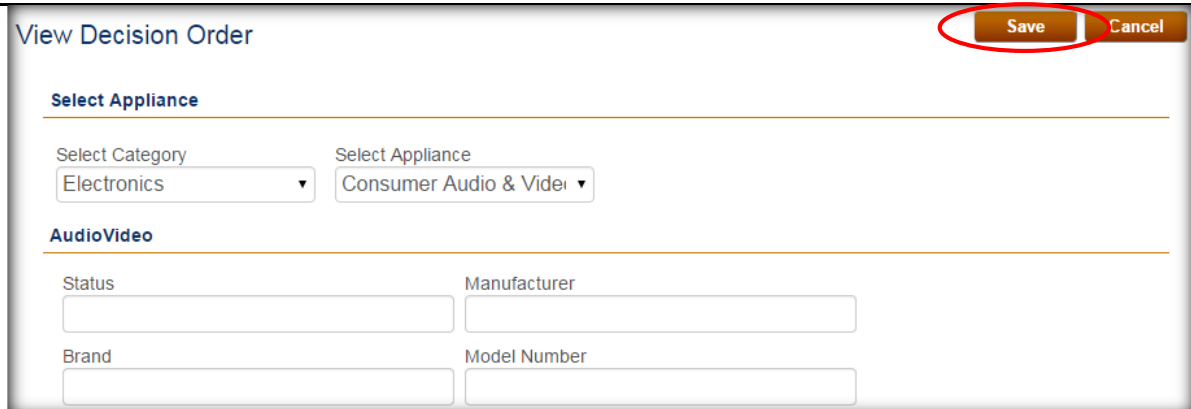


View Business Rules

Master Data Update

**View Decision Order**

4. Select the Category and Appliance from the dropdown to view the decision order for the selected appliance. Make any updates by entering a corresponding number (i.e. 1, 2, 3) and click the "Save" button.



View Decision Order

Save Cancel

Select Appliance

Select Category  
Electronics

Select Appliance  
Consumer Audio & Video

AudioVideo

Status  
Manufacturer

Brand  
Model Number

5. After clicking "Save" a message will be displayed near the top of the screen that lets the user know the decision order information was saved successfully.



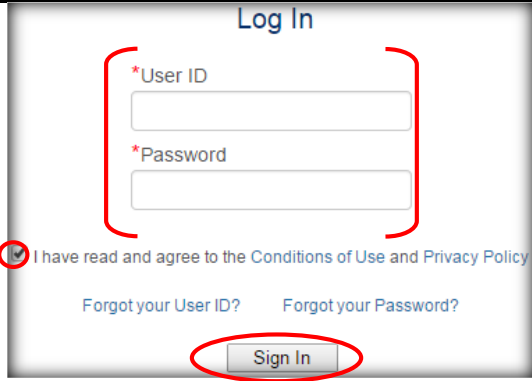
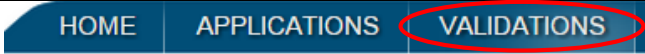
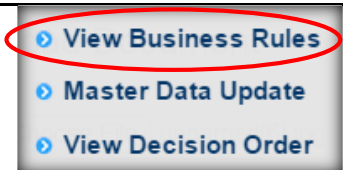
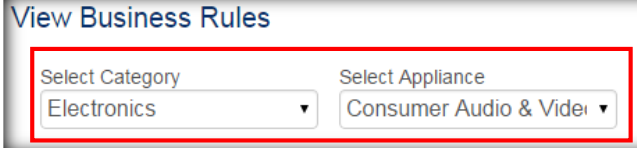
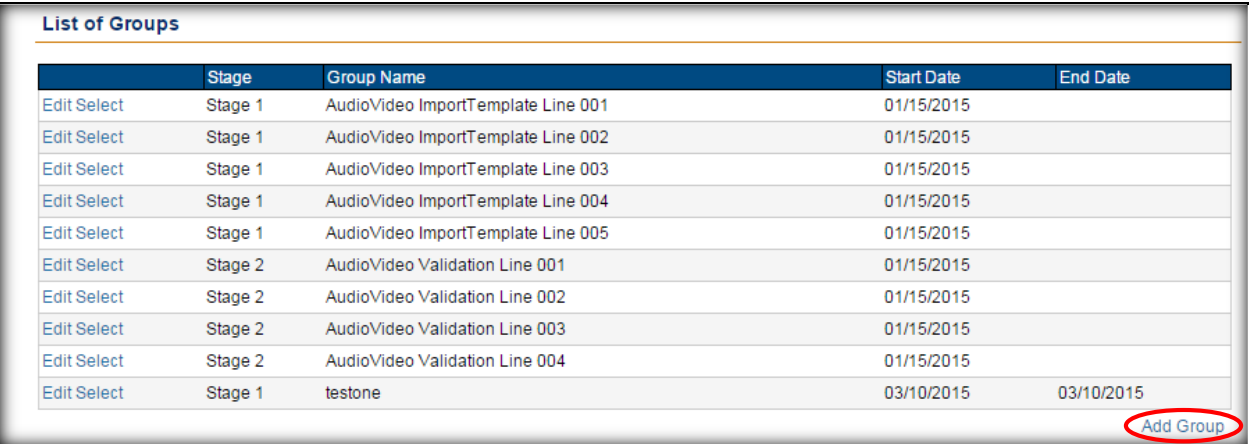
View Decision Order

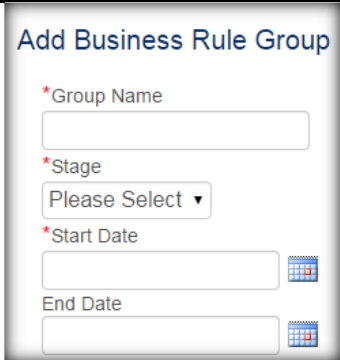

Record saved successfully.

Select Appliance

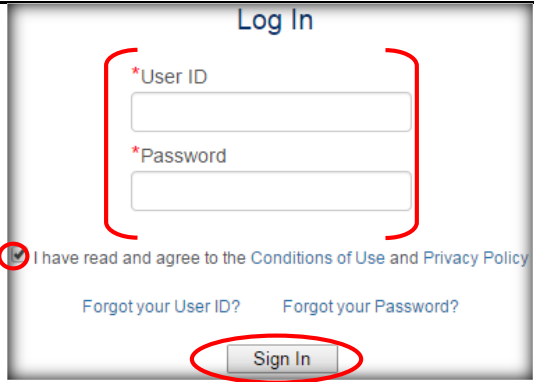
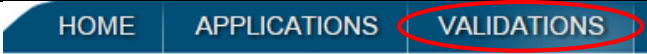
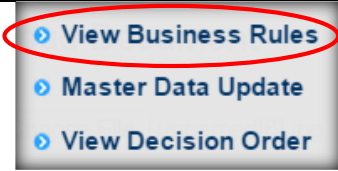
#### 4.11.2 Add a Group

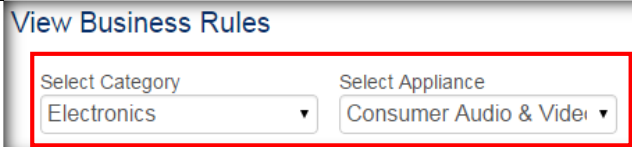
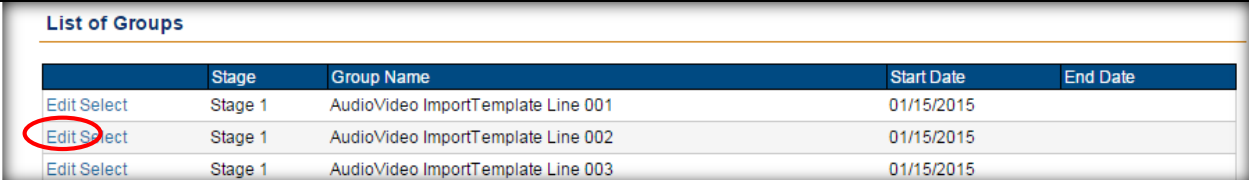
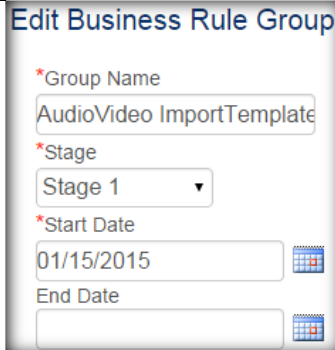

Each validation rule belongs to a rule group which will be listed as i.e. Import Template line 1, Validation Line 1. Once a rule group has been added, users will not be able to delete an entire grouping from the list manually but there will be an option to set an end date for a rule group which will render it archived. This archived rule group will still display in the rule group list. If users wish to remove the rule group from the listing completely, they must contact IT to have it permanently deleted. To add a rule group, complete the steps below.

Steps to Complete Process	
1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.	
2. Click on the "Validations" tab in the top menu.	
3. Click "View Business Rules"	
4. Select the Appliance Category and Type from the dropdown menus.	
5. Click on the "Add Group" link at the bottom right of the Groups grid.	
	

<p>6. Enter new Business Rule Group information in the fields provided.</p>	
<p>7. Click the “Save” button in the top right corner.</p> <p>Note: After clicking “Save” you will return to the View Business Rules screen where the newly added group will be displayed in the List of Groups. The system will now allow additional rules to be added to the rule group.</p>	

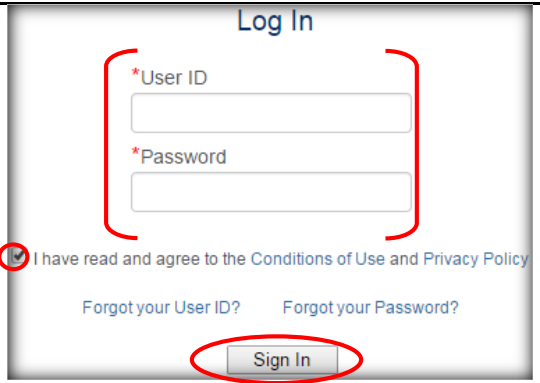
#### 4.11.3 Edit an Existing Group

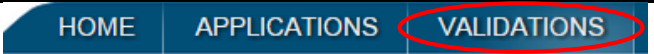
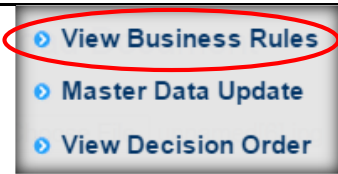
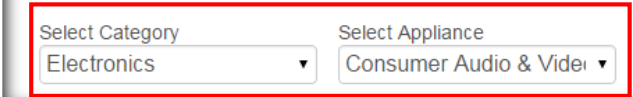
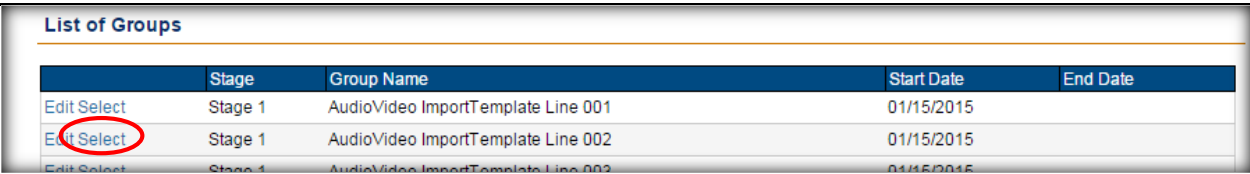

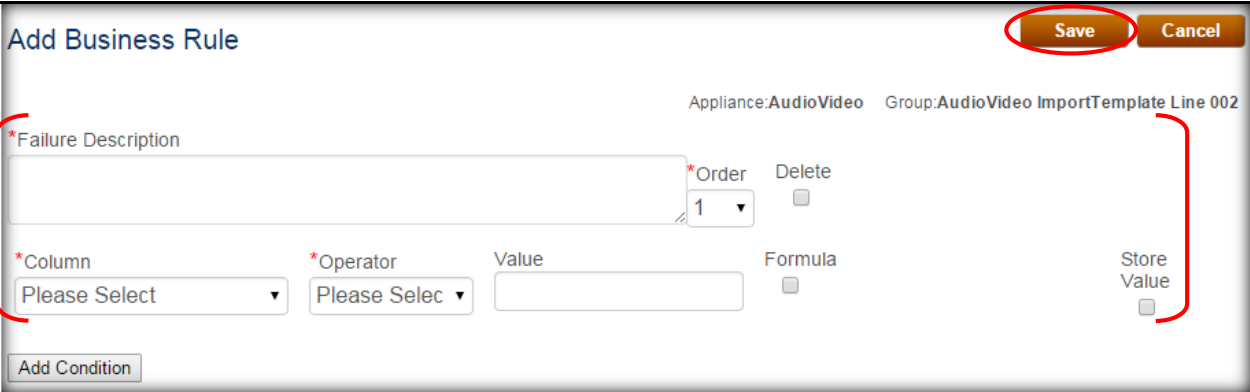
Steps to Complete Process	
<p>1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the “Sign In” button.</p>	
<p>2. Click on the “Validations” tab in the top menu.</p>	
<p>3. Click “View Business Rules”</p>	

4. Select the Appliance Category and Type from the dropdown menus.	
5. Click on the "Edit" link to the left of the Group that is to be edited.	
6. Change the Business Rule Group information as needed.	
7. Click the "Save" button in the top right corner.  Note: After clicking "Save" you will return to the View Business Rules screen where you will see the newly edited group information displayed in the List of Groups.	

#### 4.11.4 Add a Rule

To edit validation rules, staff will login and navigate to the validation rules page. Staff will be able to edit current validation rules or create new ones if appliance standards have changed. There will also be an option to archive previous validation rules if necessary by using the end date function.

Steps to Complete Process	
1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.	

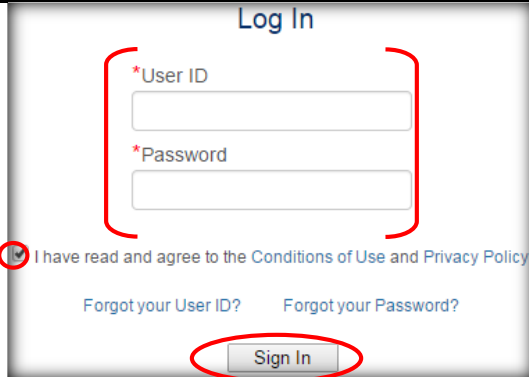
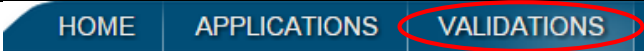
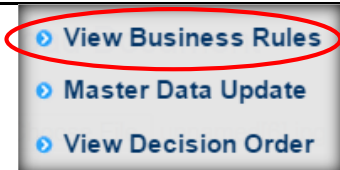
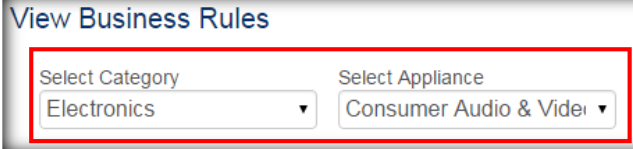
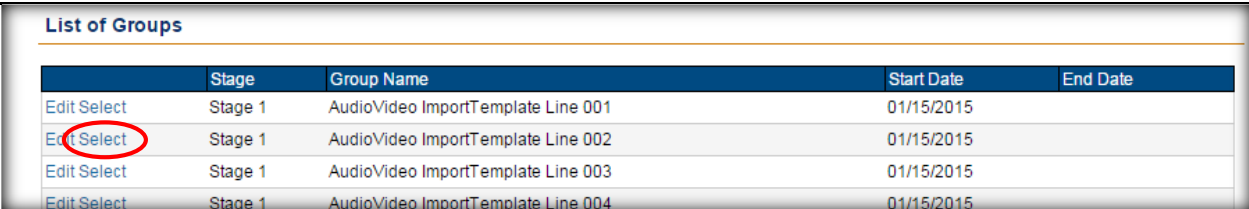
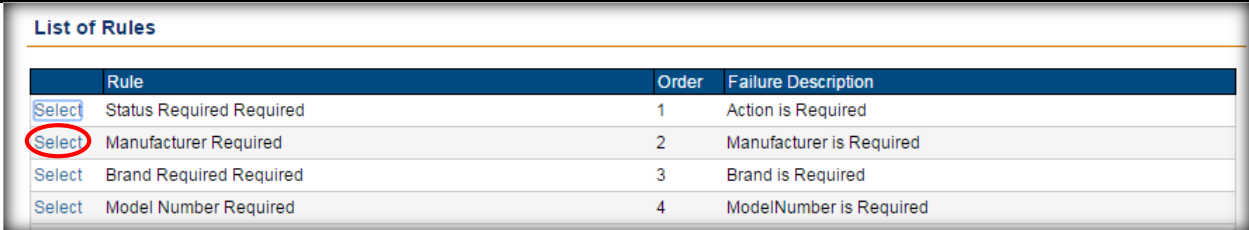
2. Click on the "Validations" tab in the top menu.	
3. Select the "View Business Rules" link.	
4. Select the Appliance Category and Type from the dropdown menus.	
5. Click the "Select" link to the left of the Group to which a rule will be added.	
	
6. Click on the "Add Rule" hyperlink located at the bottom right of the Rules grid.	
	
7. Enter the new rule information in the fields provided and then click the "Save" button in the top right corner.	
	

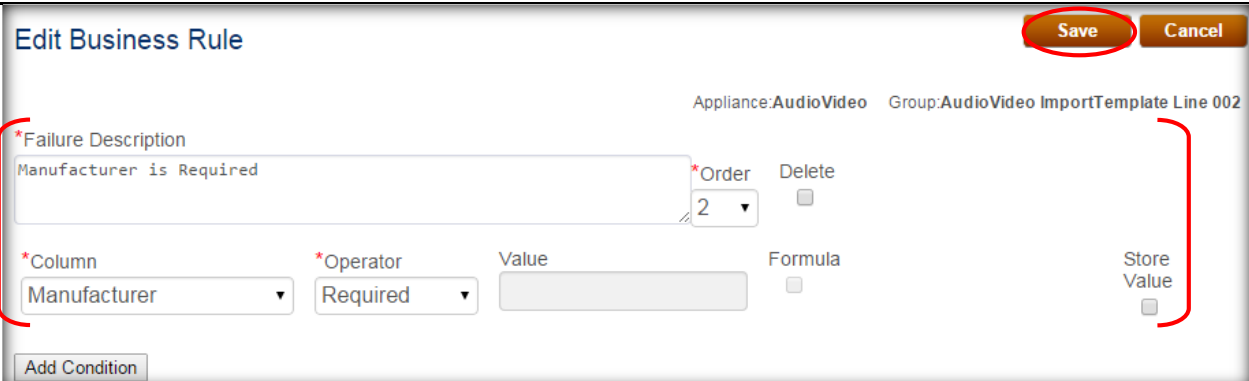

8. After clicking “Save” a message will be displayed near the top of the screen that lets the user know the new business rule was saved successfully.

Add Business Rule

Record saved successfully.

#### 4.11.5 Edit a Rule

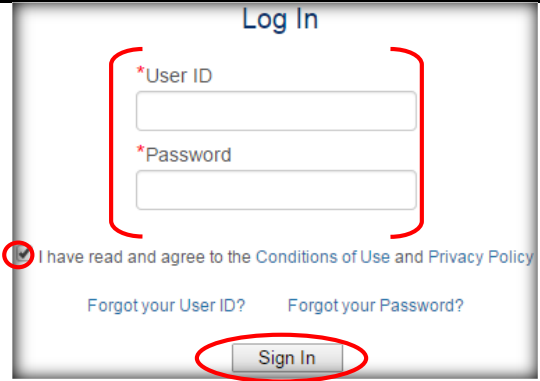

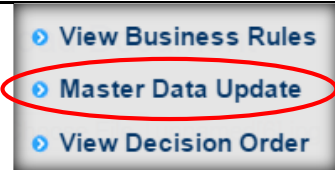
Steps to Complete Process	
1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.	
2. Click on the "Validations" tab in the top menu.	
3. Click "View Business Rules"	
4. Select the Appliance Category and Type from the dropdown menus.	
5. Click the "Select" link to the left of the Group to which a rule will be added.	
	
6. Click on the "Select" hyperlink located to the left of the desired rule.	
	
7. Enter the changes to the rule information and then click the "Save" button in the top right corner.	

	
<p>8. After clicking “Save” a message will be displayed near the top of the screen that lets the user know the newly edited business rule was saved successfully.</p>	

## 4.12 Master Data Update

This section allows staff users to add additional lookup values that are utilized in MAEDBS which is displayed as data in dropdown menus. While staff users are able to add values, they are not able to delete from the user interface and will need to contact IT for any permanent deletion of lookup values. To make changes to existing lookup values or to add a new lookup value complete the steps below.

### 4.12.1 Edit Master Data

Steps to Complete Process	
1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the “Sign In” button.	
2. Click on the “Validations” tab in the top menu.	
3. Select the “Master Data Update” link.	

4. Select a Lookup Name from the dropdown menu.

#### View or Update Lookup Data

Select Lookup Name

EnergySource ▼

5. Click the “Select” link next to the Lookup Value to be edited.

#### Lookup Values (EnergySource)

	Code	Description	Label	SortOrder
Select	B	Both Heat Pump and Electric Resistance	Both Heat Pump and Electric Resistance	1
Select	C	Combo (Natural Gas & Oil)	Combo (Natural Gas & Oil)	2
Select	E	Electricity	Electricity	3
Select	G	Natural Gas	Natural Gas	4
Select	H	Heat Pump	Heat Pump	5

6. Change the Lookup Value information as needed and then click the “Save” button in the top right corner of the screen.

Note: After clicking “Save” you will return to the “View or Update Lookup Data” screen where you will see the newly edited master data displayed in the Lookup Value list.

#### Edit Lookup Value

Save

Cancel

\*Label

Electricity

\*Code

E

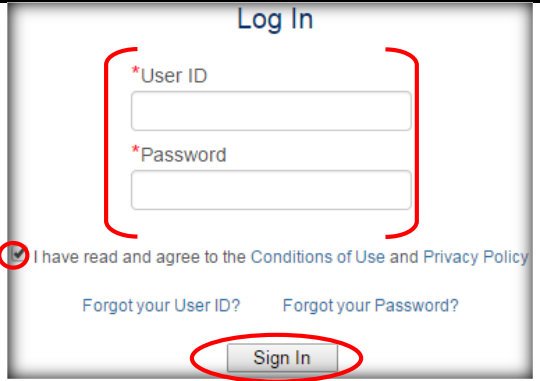

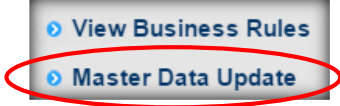
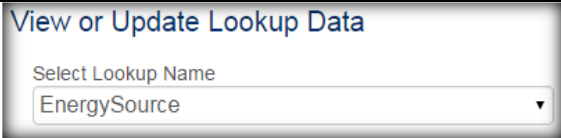
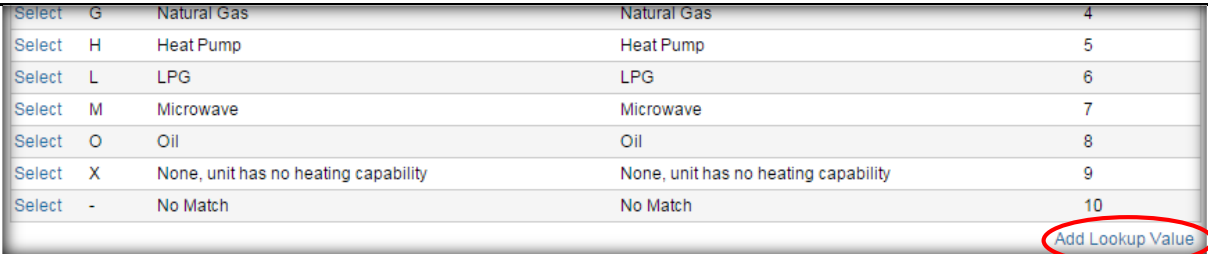
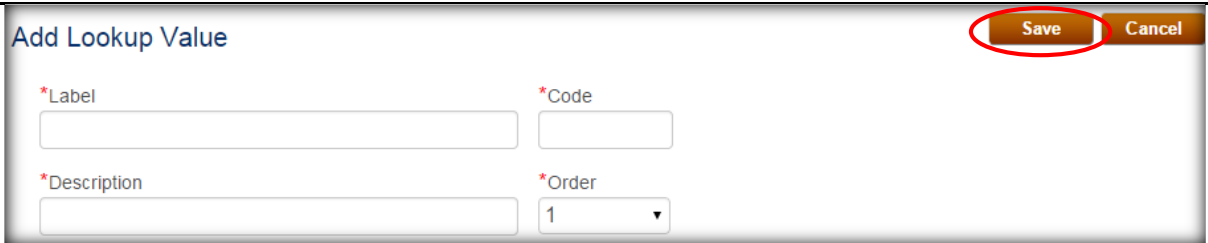
\*Description

Electricity

\*Order

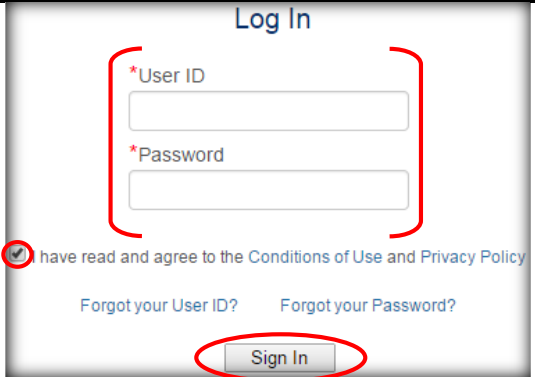

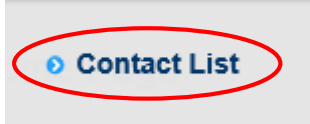
3 ▼

#### 4.12.2 Add Master Data

Steps to Complete Process	
1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.	
2. Click on the "Validations" tab in the top menu.	
3. Select the "Master Data Update" link.	
4. Select a Lookup Name from the dropdown menu.	
5. Click on the "Add Lookup Value" hyperlink located at the bottom right corner of the Lookup Value grid.	
	
6. Enter the new Lookup Value information and then click the "Save" button in the top right corner.  Note: After clicking "Save" you will return to the "View or Update Lookup Data" screen where you will see the new lookup value displayed in the Lookup Value list.	
	

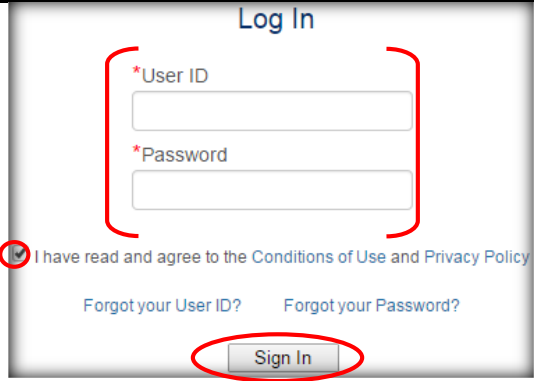
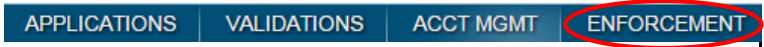
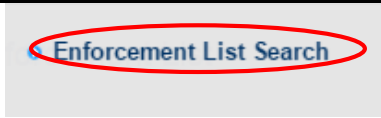
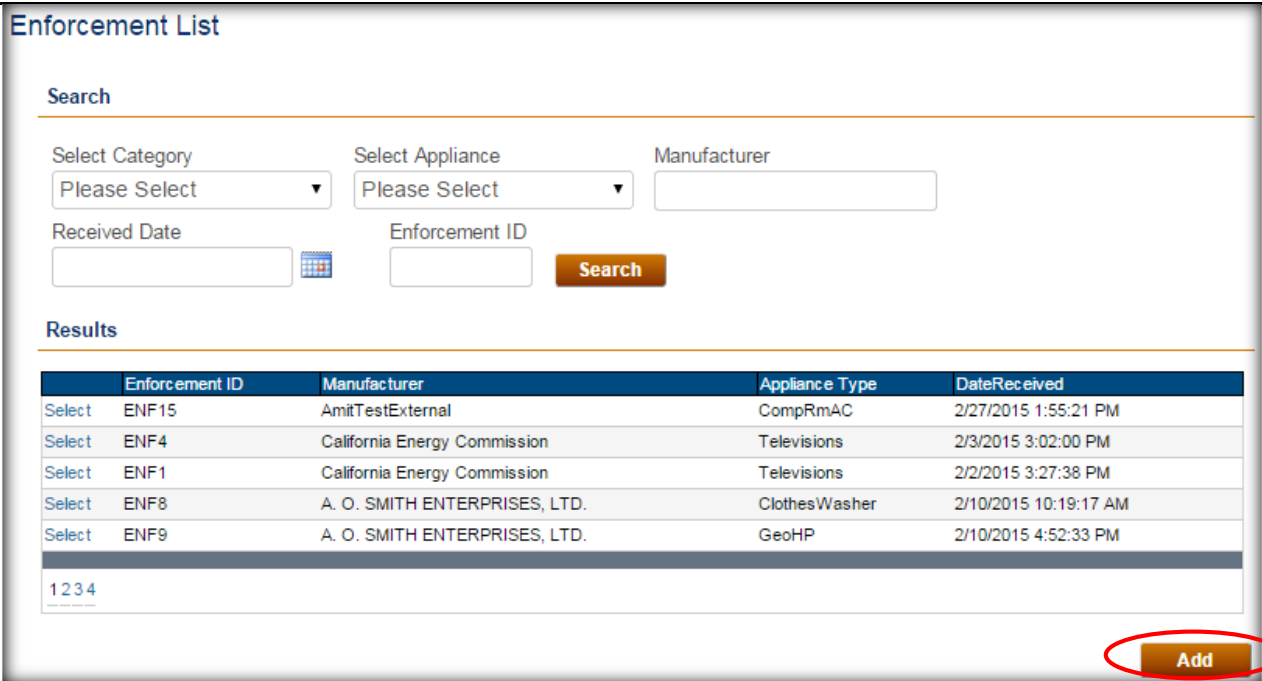
### 4.13 Generate Reports

To generate a canned report staff logs in to the system and navigates to the reports tab. The user can select the type of report they wish to generate. Once the type of report is selected, staff can enter report parameters and the system will then generate the report.

Steps to Complete Process	
1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.	
2. Click the "Reports" tab	
3. Select the report to generate by clicking the hyperlink	

#### 4.14 Create Enforcement File

Once staff receives a compliance concern they will log into the system to create a new enforcement file. A user is able to link one or more manufacturers, appliance listings, test labs or certifiers to one file. The user is then able to append any notes associated with the compliance concern to the enforcement file.

Steps to Complete Process	
1. Enter the CEC staff User ID and Password, check the Conditions of Use and Privacy Policy box and then click on the "Sign In" button.	
2. Click the "ENFORCEMENT" tab in the top menu.	
3. Click on the "Enforcement List Search" link.	
4. Click the "Add" button located at the bottom right of the enforcement search grid.	
	

5. Enter enforcement information on enforcement file detail page.

Enforcement Matter # ENF4 Save Cancel

**Complainant**

\*Source Name  Company

\*Country

\*Address Line 1  Address Line 2

\*City  \*USA State  Foreign State/Province  \*ZIP/Postal Code

Phone Number  Email Address

**Actors**

Company	Country	Company Type	Company WebSite(URL)
Select	California Energy Commission		http://www.energy.ca.gov/

Add

**Actions taken**

Company's Name	Involves Actions Of	Matter Description	Actions taken	Action Date
Select	Distributor	Market Survey Contract		2/3/2015 3:02:00 PM

Add

**Notes**

**Documents**

Document Name	Created Date
No records found	

Upload Documents

**Details**

\*Select Category  \*Select Appliance  \*Received Via

\*Intake By  \*Source of this Matter

How Resolved1  Models WithDrawn 1  How Resolved2  Models WithDrawn 2

\*Enforcement Status  Models Certified 1  Models Certified 2  Resolved Date

☒ Referred To Legal

View Documents

6. Scroll down to the document section and click on the “Upload Documents” button to the bottom right of the document grid.

**Documents**

Document Name	Created Date
No records found	

Upload Documents

7. Click the “Add” button.

## Document List

Document Name	Created Date
No records found	
<div><div>Add</div><div>Next</div></div>	

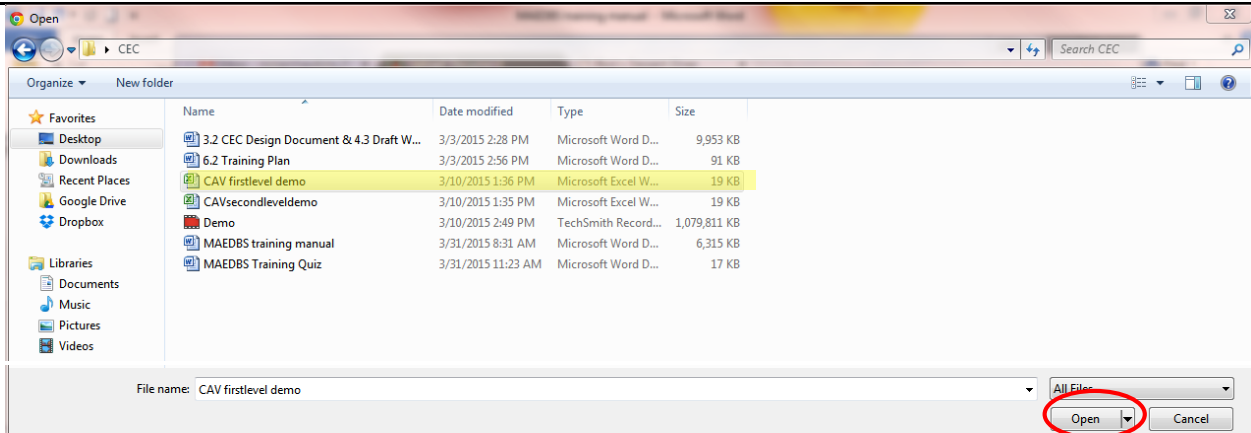
8. Click the “Choose File” button and select file to upload.

## Upload Document

Choose File

 No file chosen

9. Select the document and click on the “Open” button in the bottom right corner.



10. When the file displays in field, click “Next”.

## Upload Document

Choose File

 CAV firstlevel demo.xlsx

Previous

Next

11. Click the “Next” button to return to the enforcement file with the newly added documents.

## Document List

Document Name	Created Date
CAVsecondleveldemo_04092015014520.xlsx	04/09/2015
CAV firstlevel demo_04092015014747.xlsx	04/09/2015
<div><div>Add</div><div>Next</div></div>	

12. Click “Save” to save enforcement file with attached documents

Enforcement Matter # ENF4

Save Cancel

Complainant

\*Source Name

TestName

Company

ACB tech

\*Country

USA

## 4.14 Mobile Appliance Search

### 4.14.1 Appliance Search

To conduct a mobile appliance search and to view individual appliance data complete the following steps:

1. After accessing the site from your mobile device, the mobile home page will display select "Appliance Search"



2. The system will then navigate to the mobile appliance search screen.

## Appliance Search

Enter Model or Manufacturer

Search

More Filters

[Full Site](#)

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3. Enter the search criteria and click the "Search" button

## Appliance Search

LXA1230AX

Search

More Filters

[Full Site](#)

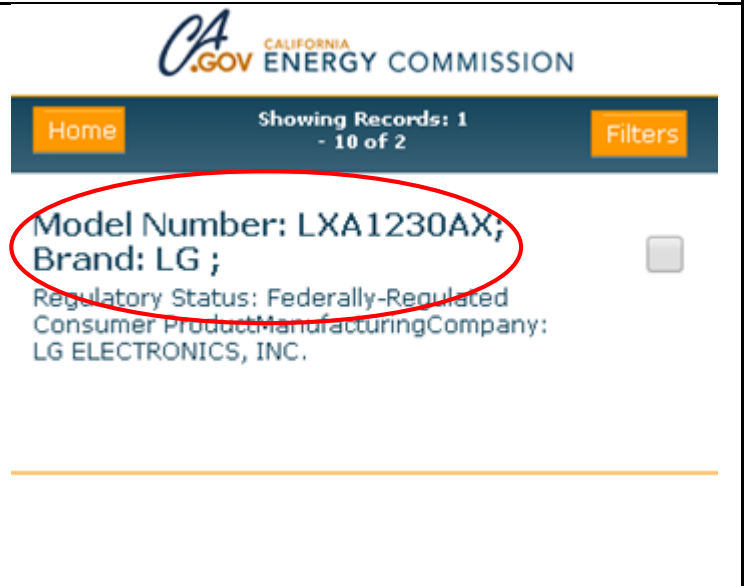
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4. Search results will display on the following page.




The screenshot shows the California Energy Commission website. At the top is the logo "CA .GOV CALIFORNIA ENERGY COMMISSION". Below the logo is a navigation bar with "Home" and "Filters" buttons. In the center, it says "Showing Records: 1 - 10 of 2". The main content area displays the following information: "Model Number: LXA1230AX; Brand: LG ; Regulatory Status: Federally-Regulated Consumer Product Manufacturing Company: LG ELECTRONICS, INC." There is a small square icon to the right of the brand name.

5. Click on the model number link to view the full list of unique model data.



The screenshot shows the California Energy Commission website, identical to the one above. However, the text "Model Number: LXA1230AX; Brand: LG ;" is circled in red, indicating it is a clickable link.

6. Use the “Next” button to view additional search results if applicable. Use the “Previous” button to view the previous page.

 CALIFORNIA ENERGY COMMISSION

[Home](#) Showing Records: 1 - 10 of 1688 [Filters](#)

**Model Number:** LH75DMD;  
**Brand:** Samsung ;

Regulatory Status: Voluntarily  
CertifiedManufacturingCompany: SAMSUNG ELECTRONICS CO., LTD.

☐

**Model Number:** CPA09-004A;  
**Brand:** Samsung ;

Regulatory Status: Non Federally-  
RegulatedManufacturingCompany:  
SAMSUNG ELECTRONICS CO., LTD.

☐

**Model Number:** RS2555W;  
**Brand:** Samsung ;

Regulatory Status: Federally-Regulated  
Consumer ProductManufacturingCompany:  
SAMSUNG ELECTRONICS CO., LTD.

☐

**Model Number:** HT-Q40;  
**Brand:** Samsung ;

Regulatory Status: Non Federally-

☐

[< Prev](#) [Compare](#) [Next >](#)

7. After selecting the model number, the following page will display all data associated to that specific model.

Model:LXA1230AX

**Manufacturer:** LG ELECTRONICS, INC.

**Brand:** LG

**RegulatoryStatus:** Federally-Regulated Consumer Product

**Add Date:** 9/21/2001

**Appliance Status:** Approved

**Heating Capable :** None

**Cooling Input Watts :** 1330

**Room AC Type :** Room Air Conditioner

**Energy Efficiency Ratio (EER) :** 9

**EERStd :** 8.5

**Phase :** 1

**Cooling Output BTUH :** 12000

**Voltage :** 230

**Louvers? :** False



Search Results



Home

8. After viewing appliance data, select the “Search Results” button to view search results or select “Home” to navigate back to the mobile home page.

Model:LXA1230AX

**Manufacturer:** LG ELECTRONICS, INC.

**Brand:** LG

**RegulatoryStatus:** Federally-Regulated Consumer Product

**Add Date:** 9/21/2001

**Appliance Status:** Approved

**Heating Capable :** None

**Cooling Input Watts :** 1330

**Room AC Type :** Room Air Conditioner

**Energy Efficiency Ratio (EER) :** 9

**EERStd :** 8.5

**Phase :** 1

**Cooling Output BTUH :** 12000

**Voltage :** 230

**Louvers? :** False



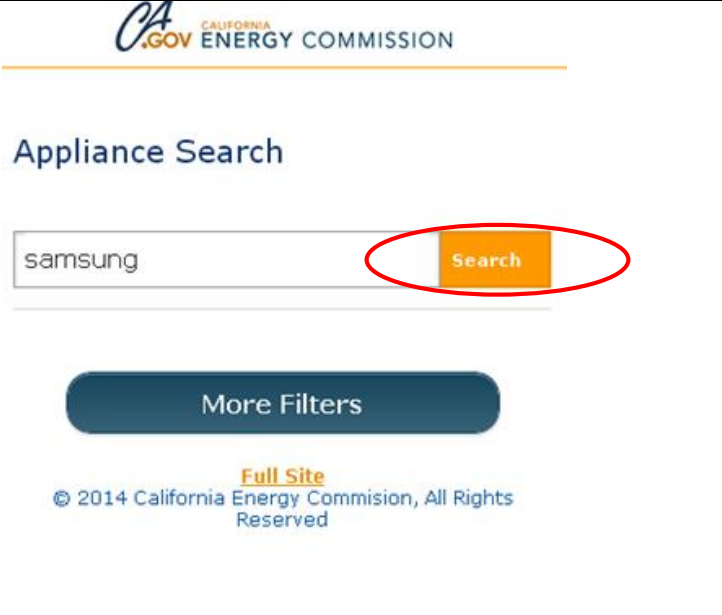
Search Results



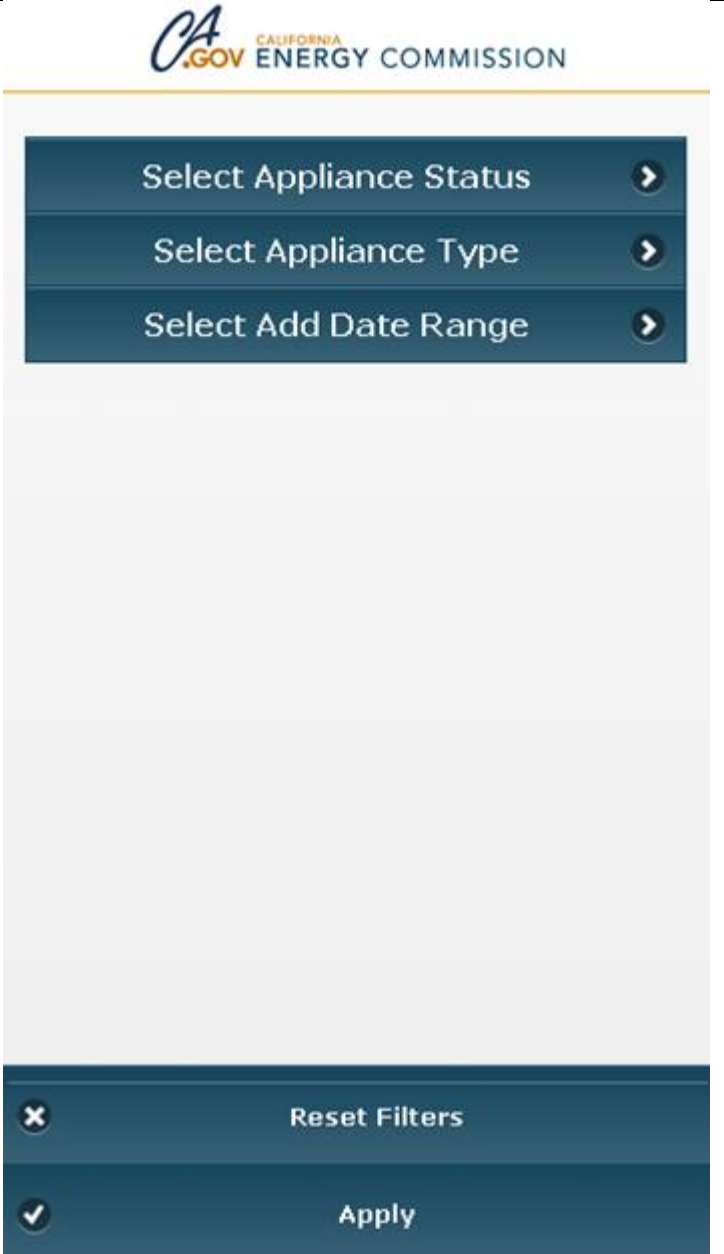
Home

#### 4.14.2 Search Filters

In addition to searching by model number or manufacturer, a user is able to search using filters. The mobile display allows the use of filters to narrow search results. To use filtering follow the steps below:

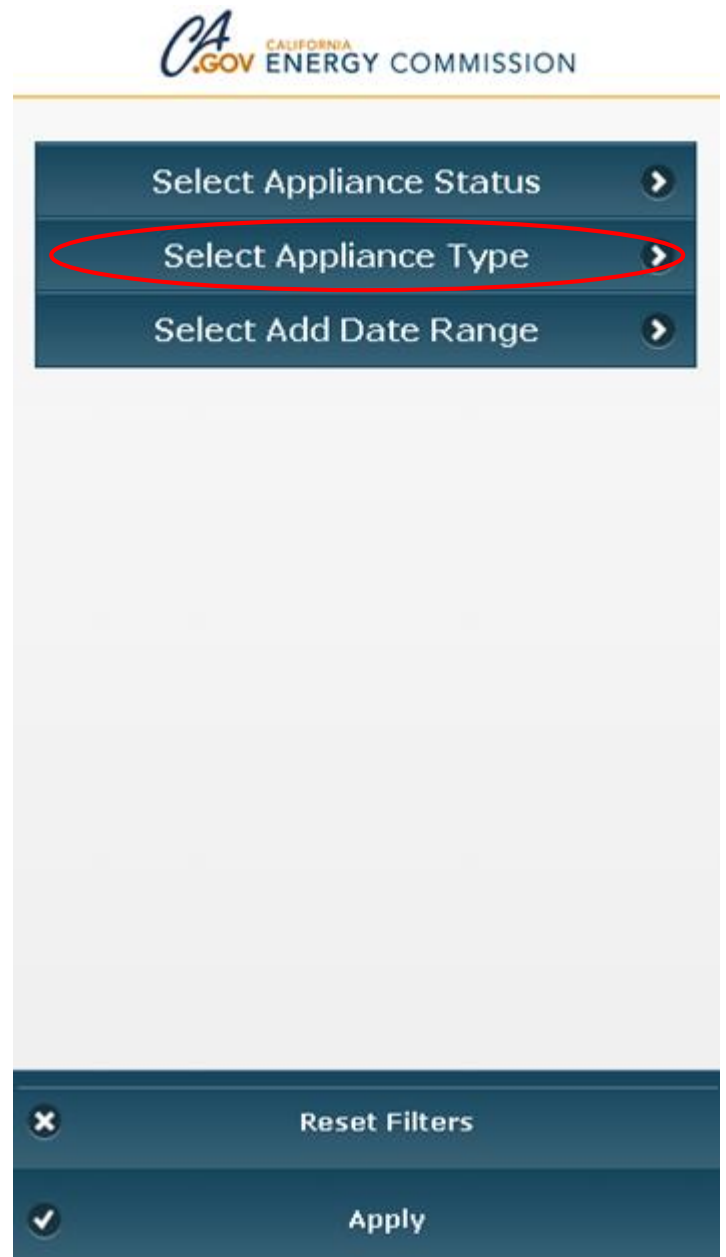
<p>1. In this example, we will search broadly, entering i.e. Samsung in the search field and clicking "Search".</p>	 <p>The screenshot shows the 'Appliance Search' page. At the top is the 'CA.GOV ENERGY COMMISSION' logo. Below it is a search bar with 'samsung' entered. The 'Search' button is highlighted with a red circle. Below the search bar is a 'More Filters' button. At the bottom, there is a 'Full Site' link and a copyright notice: '© 2014 California Energy Commission, All Rights Reserved'.</p>
<p>2. The number at the top is quite large as the system has retrieved 1,688 total records (number listed at the top) that contain the word "Samsung". Click "Filters" located at the top right of the screen.</p>	 <p>The screenshot shows the search results page. At the top is the 'CA.GOV ENERGY COMMISSION' logo. Below it is a navigation bar with 'Home', 'Showing Records: 1 - 10 of 1688', and 'Filters' (highlighted with a red circle). Below the navigation bar are three search results, each with a checkbox to its right:</p> <ul style="list-style-type: none"><li><b>Model Number: LH75DMD;</b> <b>Brand: Samsung ;</b> Regulatory Status: Voluntarily CertifiedManufacturingCompany: SAMSUNG ELECTRONICS CO., LTD.</li><li><b>Model Number: CPA09-004A;</b> <b>Brand: Samsung ;</b> Regulatory Status: Non Federally-RegulatedManufacturingCompany: SAMSUNG ELECTRONICS CO., LTD.</li><li><b>Model Number: RS2555W;</b> <b>Brand: Samsung ;</b> Regulatory Status: Federally-Regulated Consumer ProductManufacturingCompany: SAMSUNG ELECTRONICS CO., LTD.</li></ul>

3. There are options to filter by Appliance Status, Appliance Type and Add date range. The “Reset Filters” button will clear all currently selected filters and the “Apply” button will apply selected filters.

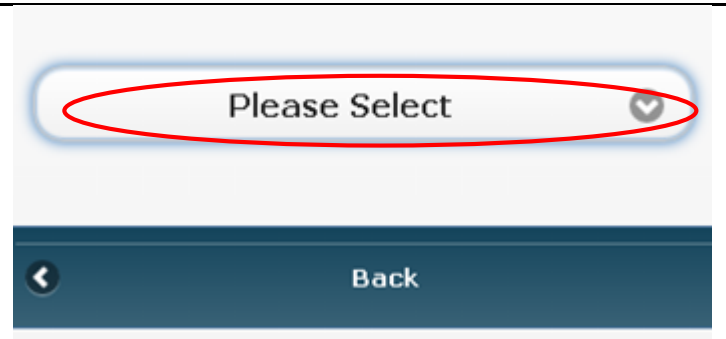



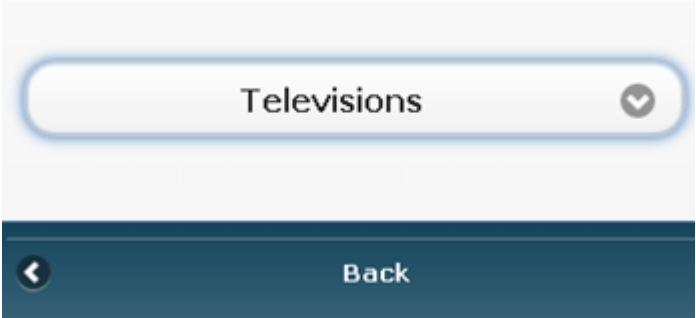
The screenshot displays the California Energy Commission's filter interface. At the top, the logo for the California Energy Commission is visible, featuring a stylized 'CA' and the text 'CALIFORNIA ENERGY COMMISSION'. Below the logo, there are three dark blue buttons with white text and right-pointing chevrons: 'Select Appliance Status', 'Select Appliance Type', and 'Select Add Date Range'. The main area of the interface is a large, empty light gray rectangle. At the bottom, there are two dark blue buttons with white text and icons: 'Reset Filters' with a white 'X' icon and 'Apply' with a white checkmark icon.

4. In this example, we will filter by appliance type, i.e. Televisions. Click the “Select Appliance Type” filter.

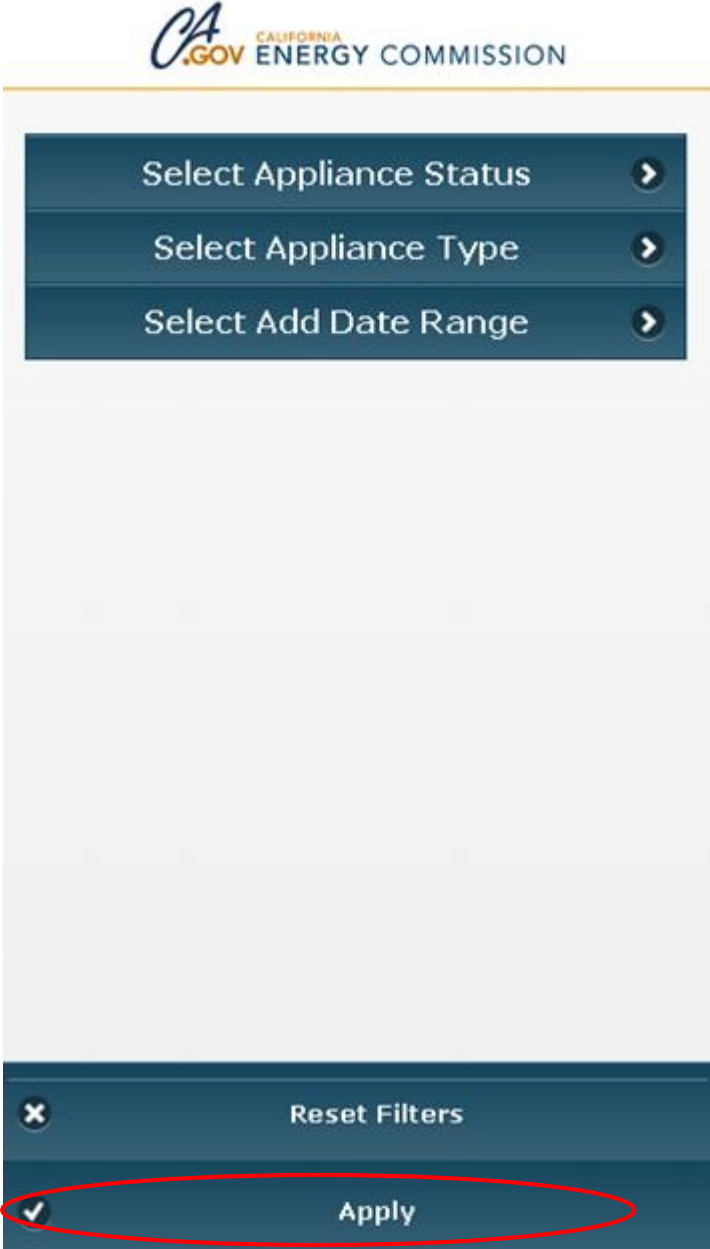


5. Click on the dropdown to view a list of appliance types to choose from.



<p>6. From the dropdown list that displays, select “Televisions”.</p>	
<p>7. Once the appliance type is selected the name will appear in the dropdown. Click “Back” when finished.</p>	

8. On the next page, click “Apply”



The screenshot shows the California Energy Commission logo at the top. Below it are three filter buttons: "Select Appliance Status", "Select Appliance Type", and "Select Add Date Range", each with a right-pointing arrow. At the bottom, there are two buttons: "Reset Filters" with a close icon (X) and "Apply" with a checkmark icon. The "Apply" button is circled in red.

9. After clicking “Apply” the next page will display the home screen with the original search criteria, in this case “Samsung”. Click the “Search” button to run the search with the newly added filter.



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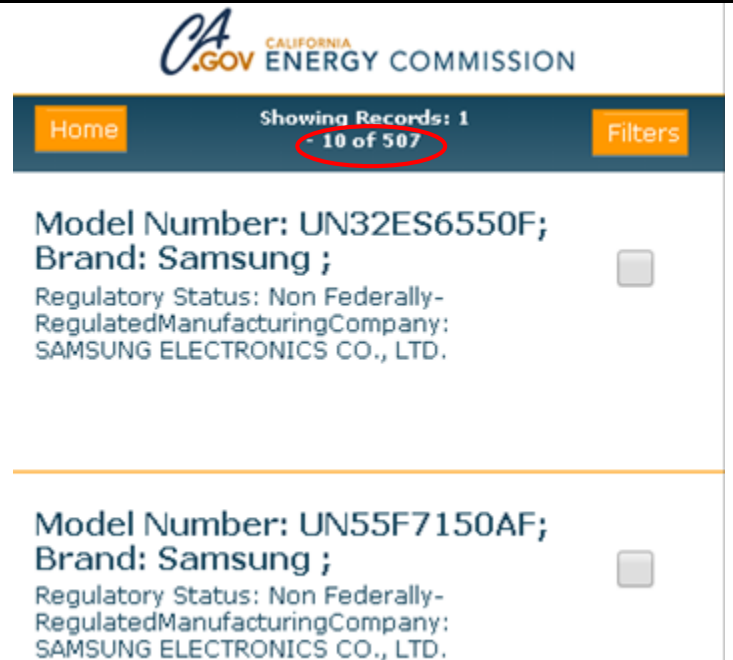
## Appliance Search

samsung **Search**

**More Filters**

[Full Site](#)  
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10. Now, the results that display are narrowed down by Appliance Type- Televisions by Samsung, yielding a fewer number of results, 507. To apply additional filters, follow the same process for each.



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**Home** Showing Records: 1 **Filters**  
10 of 507


**Model Number: UN32ES6550F;**  
**Brand: Samsung ;**  
Regulatory Status: Non Federally-Regulated  
Manufacturing Company: SAMSUNG ELECTRONICS CO., LTD.

**Model Number: UN55F7150AF;**  
**Brand: Samsung ;**  
Regulatory Status: Non Federally-Regulated  
Manufacturing Company: SAMSUNG ELECTRONICS CO., LTD.

4.14.3 Compare Models

After conducting an appliance search, the user has an option to compare model data for up to two appliances. To select and compare two appliance models complete the following steps:

- 1. After conducting an appliance search and viewing the results list, select the checkbox next to the appliances for comparison.

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Model Number: TL1232; Brand: TJ Maxx ;

Regulatory Status: Non Federally-RegulatedManufacturingCompany: Jimco Lamp & Manufacturing Co.

☒

Model Number: TL1232; Brand: Home Goods ;

Regulatory Status: Non Federally-RegulatedManufacturingCompany: Jimco Lamp & Manufacturing Co.


☒

Model Number: TL1232; Brand: Marshalls ;

Regulatory Status: Non Federally-RegulatedManufacturingCompany: Jimco Lamp & Manufacturing Co.

☐

2. Once two appliances have been selected. Click on the “Compare” button located on the bottom of the screen.

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Model Number: TL1232; Brand: TJ Maxx ; ☒

Regulatory Status: Non Federally-RegulatedManufacturingCompany: Jimco Lamp & Manufacturing Co.

Model Number: TL1232; Brand: Home Goods ; ☒

Regulatory Status: Non Federally-RegulatedManufacturingCompany: Jimco Lamp & Manufacturing Co.

Model Number: TL1232; Brand: Marshalls ; ☐

Regulatory Status: Non Federally-RegulatedManufacturingCompany: Jimco Lamp & Manufacturing Co.

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3. The display will then show the appliance data for the selected models. After viewing the appliance data, click on “Search Results” to navigate back to the search results page or click on “Home” to navigate back to the mobile search home page.

**Model: TL1232**  
Jimco Lamp & Manufacturing Co., Brand: TJ Maxx

**Regulatory Status:** Non Federally-Regulated

**Add Date:** 1/7/2013

**Total Sockets :** 1.00000

**Base Type :** Medium Screw Base

**Compliance Method Used :** E12, E17, or E26 screw-based socket w/prepackaged lamp

**Portable Luminaire Type :** Table

**Model: TL1232**  
Jimco Lamp & Manufacturing Co., Brand: Home Goods

**Regulatory Status:** Non Federally-Regulated

**Add Date:** 1/7/2013

**Portable Luminaire Type :** Table

**Compliance Method Used :** E12, E17, or E26 screw-based socket w/prepackaged lamp

**Base Type :** Medium Screw Base

**Total Sockets :** 1.00000



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