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Secretary for
Environmental Protection

CALIFORNIA ENVIRONMENTAL REPORTING SYSTEM (CERS)

BULLETIN #7 **Data Exchange and Web Portal Concepts**

By January 1, 2013 all businesses and UPAs are required to report electronically. Comments or questions? Send them to cupa@calepa.ca.gov

Updates

- Forty-three CUPAs and PAs (37% of all UPAs) are now allowing businesses to electronically submit to CERS or to their local system. Many require hard copies as well during this transition period. If your agency is ready to start allowing your businesses to electronically submit, please let us know at CERS@calepa.ca.gov.
- AB 2286 Grant: Cal/EPA has determined that up to 25% of the grant could be awarded to UPAs in advance of spending. Details will be provided with the UPA Transition Plan and Grant Application Packet scheduled to go out in April.
- Cathi Gregory and Jesse Perez joined the Cal/EPA team in February. Cathi is the Associate Information Systems Analyst and lead of the CERS Help team. Her phone number is 916-445-6812 and her email is cgregory@calepa.ca.gov. Jesse is the Assistant Information Systems Analyst, also part of the CERS Help team. His phone number is 916-445-6809 and his email is JPerez@calepa.ca.gov.
- CUPAs and PAs using or planning to use Decade's Envision or EnvisionConnect are urged to join the Decade CUPA Users Group at http://www.decadesoftware.com/community/groups/viewgroup/22-CUPA+Users+Group.html. This forum will be used to help Decade's 40+ CUPAs and PAs exchange information specific to Decade's implementation of electronic reporting and everything that goes with it. Contact Decade Software for more information.
- Garrison has reported that there are at least five local agencies that will use their Digital Health Department software to manage their local CUPA/PA program data needs and to exchange data with CERS.
- FireRMS (Zoll Products) has reported that they will build a CUPA module that will exchange data with CERS.
- Several updates to CERS have been made to make the system more user friendly. These include changes to your CERS home page to show 'regulator users' and the Unified Program Directory names separately, and improvements to the facilities and submittals pages. Additional demos have been posted to the CERS Help section at https://cers.calepa.ca.gov/CERS/DemoPages/Default.aspx.
- Initial meetings with AT&T have been held regarding a pilot project to develop a multi-jurisdictional upload process. Two to three other large multi-jurisdictional businesses will be contacted in the coming months to start similar pilots.
- Reminder: Electronic reporting from local CUPAs and PAs will include site specific inspection and enforcement information; (not summary data). Inspection dates, inspector names, number and types of violations, dates corrected and dates and specific enforcement action are some of the data elements that will be required. This will be accomplished by merging Cal/EPA's UPDS (https://securecupa.calepa.ca.gov/UPDS/Web/Forms/Public/Login.aspx) program into CERS. A complete data standard is expected to be released later this summer.

Local Agency Action Items

- Identify next steps in the transition process for your agency and begin working on them. Decide on the type of system you intend to use and whether you will use a web portal (see below).

CERS Data Exchange and Web Portal Concepts

This is a general overview of concepts as they pertain to CERS and the electronic reporting requirements. Your decision regarding them will determine how your agency will meet electronic reporting requirements.

CERS, the state's Unified Program data management system, is intended as a tool to collect and maintain required facility information for businesses regulated under the Unified Program and for inspection and enforcement information for local Unified Program Agencies. There are three significant secondary roles for CERS; one, to provide facility information to local Unified Program

Agencies (UPAs) that was submitted by businesses to CERS; two, to allow UPAs to provide data collected at the local level (either submitted by business or inspection and enforcement data entered by the UPA) to CERS; and three, to provide a way to share relevant information with emergency responders either through or on behalf of the local UPA.

CERS is designed to accept data in three ways:
- Direct, manual data entry into the CERS web site
- Upload using a predefined tab delimited text file or Excel spreadsheet
  - Note: some documents will be uploaded as a pdf or other format such as the emergency contingency plan
- XML (Extensible Markup Language) exchange between computer systems (under development)

Direct, manual data entry

This approach will likely be the preferred method for small businesses and for some local agencies, including some that may use portable computers in the field to input data directly into CERS. Businesses and regulators can log in, access files, and enter data or upload documents such as facility maps, site plans, emergency contingency plans, training plans, etc.

CERS has an additional feature for direct, manual data entry. There are a number of small business 'wizards' that have been customized for specific business types and come with pre-loaded typical chemical inventories to facilitate reporting chemical information. Small businesses can streamline their reporting substantially through the use of a wizard that matches their business type (ex; dry cleaner, body shop, photo developer, etc.)

Upload using a predefined tab delimited text file or Excel spreadsheet

CERS provides a template that can be used to organize text files or Excel spreadsheets into the correct data sequence to enable uploading the data to CERS. This may be a suitable interim approach for many UPAs as they develop data exchange capability described below and may be a long term solution for many businesses. Agencies and businesses that keep data in local systems can create an export file from their local data management system that follows the Cal/EPA format and can upload that export file to CERS in a few simple steps.

XML Data Exchange

The preferred method for local agencies and multi-jurisdictional businesses is anticipated to be XML (extensible markup language) because once set up it requires virtually no staff effort to maintain or execute the exchange process and the exchange can be made on an automated pre-scheduled or real time basis. Cal/EPA plans to release a data exchange standard summer, 2010. This standard will finalize the data elements and will include a tab delimited or Excel spreadsheet template for uploading to and downloading from CERS as well as the XML schema (language) for XML exchange. Cal/EPA will work closely with Decade Software, Garrison, eCompliance, and others to ensure that the data exchange process works with existing systems to the extent possible.

Questions have been raised about the potential for over-writing more current information that exists with the second and third options and the additional issue of simultaneous back and forth exchange between the state and local systems with the XML exchange process. Cal/EPA believes that these issues can be resolved.

Web Portals

Some agencies will use their own web site, or web 'portal' to allow businesses to electronically report to the local agency and they will then upload to or exchange this data with CERS. In these cases, local agencies will also need the ability to download or exchange data that businesses, such as multi-jurisdictional businesses, have reported to CERS.

Portals offer additional features beyond strictly meeting the requirements of AB 2286. Some may provide features that assist in preparing site plans and facility maps and more comprehensive emergency response data. Agencies can customize web portals to provide many important and useful features to businesses and residents including online payment of bills, online plan checking and plans submittal, and links and features that provide other environmental health information and services to the local community.