California Residential Water Treatment Devices Registration Portal
Quick Start Guide – Manufacturer

1. Logging In

A new Residential Water Treatment Devices (RWTD) Registration Portal user must set up a WBKey account before obtaining access to the RWTD Registration Portal. A WBKey account allows a user to access State Water Board online applications.

1.1   Set up a WBKey Account

Step 1: Go to the RWTD Registration Portal.

Step 2: Click the **"Get Started"** button under **"Don't have account?"** shown in **Figure 1**. You will only need to create a WBKey account once.
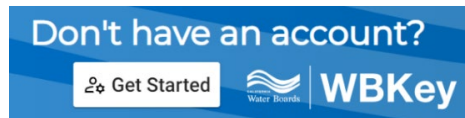

Figure 1: WBKey "Get Started" prompt

Step 3: Register New Account. Follow steps below:

Figure 2: WBKey Request Access screen

1. Enter a valid email address in the "Request Access" screen shown in **Figure 2**, preferably one associated with your business. Then ensure there is a green check mark in the top-right corner (shown below in **blue box**).

Figure 3: Send Verification Code button

2. Click on **"Send Verification Code"** button as shown in **Figure 3**.
3. Log into your email and search for **WBKey Account Email Verification** from a DoNotReply email. Please wait a few minutes for the email to arrive in your inbox. When the email arrives, look for the language: "To verify your email address, use this security code: XXXXX."
4. Navigate back to the WBKey webpage and enter the verification code. The code consists of capital letters and numbers 0-9 and is case-sensitive. Please ensure any letters in verification code are CAPITALIZED. Use the verification code provided in your email, not the "EXAMPLE" code here

Figure 4: Verification Code entry

5. After typing in the code, click on the **"Verify Code"** button in **Figure 4**.
6. Enter contact information and create a password. Ensure the password meets all verification requirements listed in **Figure 5**.
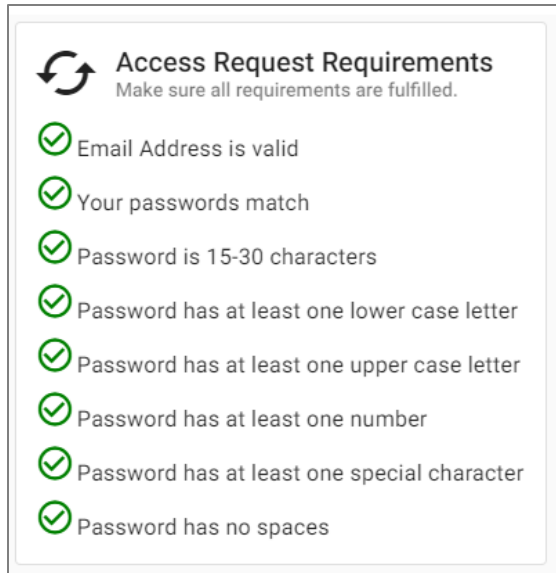
Figure 5: Password requirements

7. Enter the manufacturer's name. When entering the name of the manufacturer, the full name will appear if that manufacturer has previously submitted an application to the RWTD Program for registration; any required information missing will need to be added. If entering the name of a new manufacturer that is not yet in the RWTD Program database, the **"Add New Manufacturer"** button will appear and prompt you to enter additional manufacturer information.

   When establishing your WBKey account, you can only associate your account with <u>one</u> manufacturer. To add an additional manufacturer(s) to your account, email the RWTD Program at WTDevices@waterboards.ca.gov for assistance.

8. After filling out the required information, click on the **"Create Account & Request Access"** button. An application request confirmation email will be sent to your inbox.

Step 4: Receive Access to Application

1. After clicking the **"Request Access"** button, RWTD Program staff will review your information and, if the information is sufficient, send you an email informing you that you have been granted a WBKey account. Please allow up to 48 hours for a RWTD Program staff response.

2. Once your account has been approved, navigate back to RWTD Registration Portal. Look for and click the **"Sign In"** button as shown in **Figure 6**.

Figure 6: Sign In button

1.2 Establishing Multi-Factor Authentication

After your WBKey account has been approved by RWTD Program staff and you log into the RWTD Registration Portal for the first time, you will be prompted to enroll in Multi-Factor Authentication (MFA). MFA is a security method used to confirm a user's identity each time the user logs in. WBKey uses temporary numeric passwords that appear through the authentication app. Therefore, you must install an authentication app (Microsoft Authenticator, Google Authenticator, or Twilio Authy) on your mobile device.

Step 1: Download Multi-factor Authentication (MFA)

You will need to download and install the MFA on a mobile device. An example of an authenticator pop-up for Microsoft Authenticator is shown in the next page. Follow the steps 1-4 listed in the "Multi-factor Authentication (MFA) for WBKey Account" dialogue box (see **Figure 7**). **DO NOT** scan the QR code in the example figure.
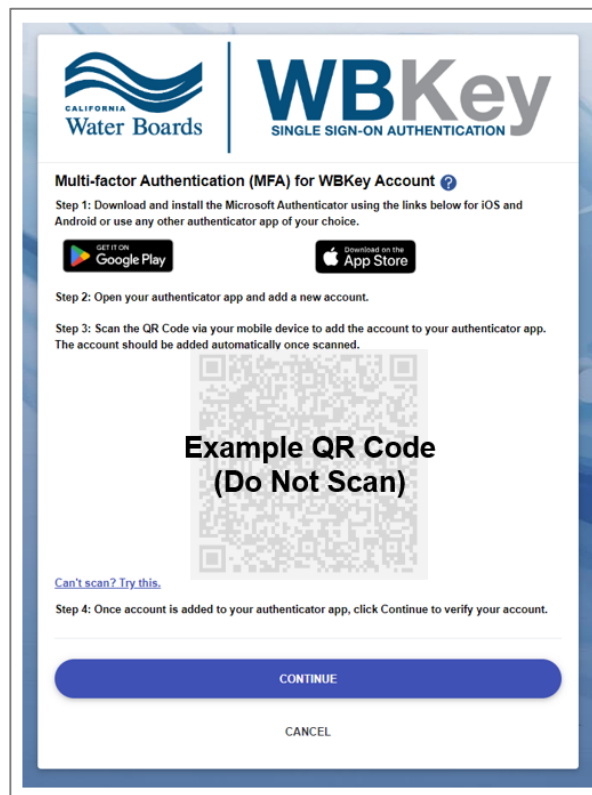

Figure 7: Example WBKey authenticator

Additional information about setting up a WBKey account and authentication, including frequently asked questions, can be found at the State Water Board's WBKey webpage. For an instructional video on how to install an authentication app, visit the State Board's WBKey Frequently Asked Questions webpage.
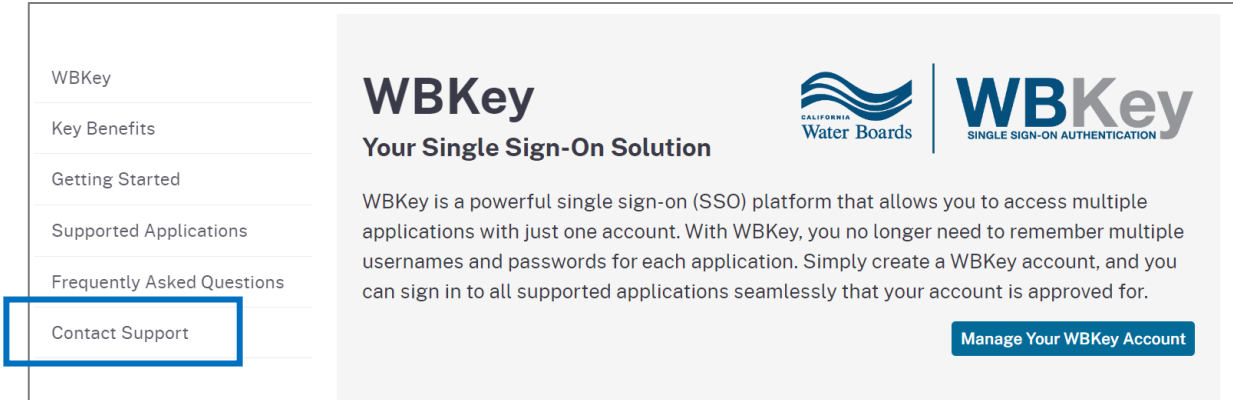
Figure 8: WBKey tab information

To obtain additional support, contact WBKey support staff. If your browser window is not maximized, expand the WBKey tab and click on "**Contact Support**." See **Figure 8.**

Step 2: Sign in with WBKey Account.

Enter the email address and password used to register the account with WBKey. See **Figure 9.**
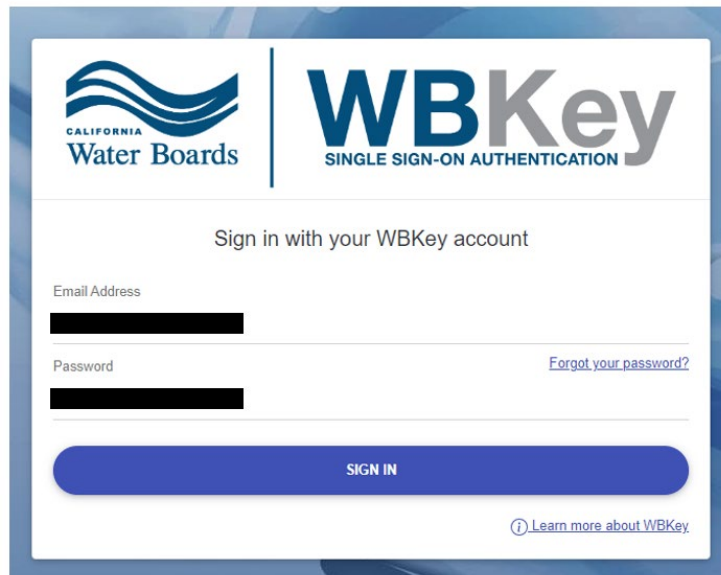

Figure 9: WBKey sign in prompt

Step 3: Enter MFA Verification Code

> Open your MFA app. **If you have multiple accounts on your authenticator, search for the account associated with "Water Boards WBKey" first.** You will see a 6-digit verification code on your MFA app (example in **Figure 10** in red box).
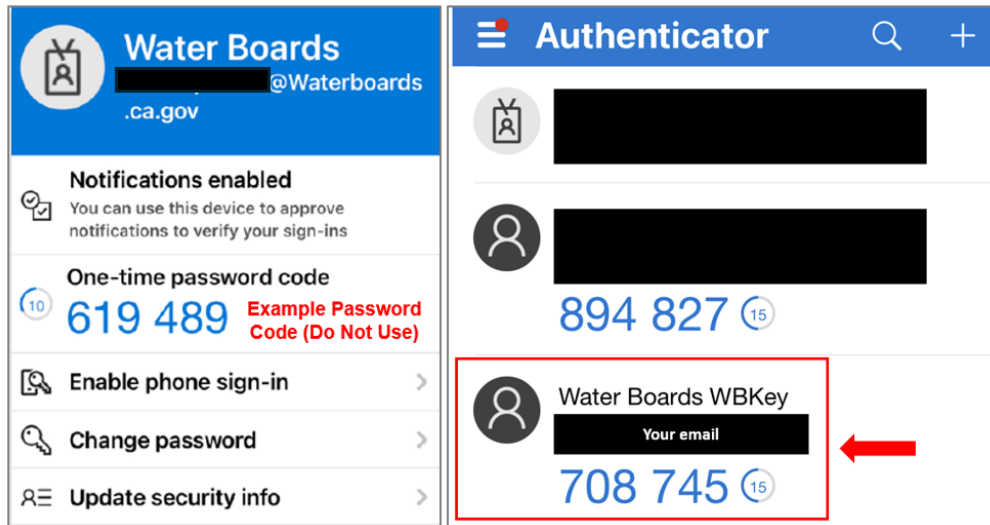
Figure 10: Authenticator prompts with codes

> Depending on the MFA app you use, you may see a different screen. <u>**DO NOT**</u> use the password/verification code in the example above.

> Enter the 6-digit verification code from your authentication app with NO spaces when prompted. See **Figure 11**. Click **"Verify"** button to continue. Once you have successfully entered the verification code, you will be directed to your RWTD Registration Portal account.

Figure 11: WBKey prompt to enter verification code

2. The Manufacturer Account

Upon logging into the RWTD Registration Portal (see **Figure 12**), you will see three tabs on the left side of the screen: **"Home," "Ma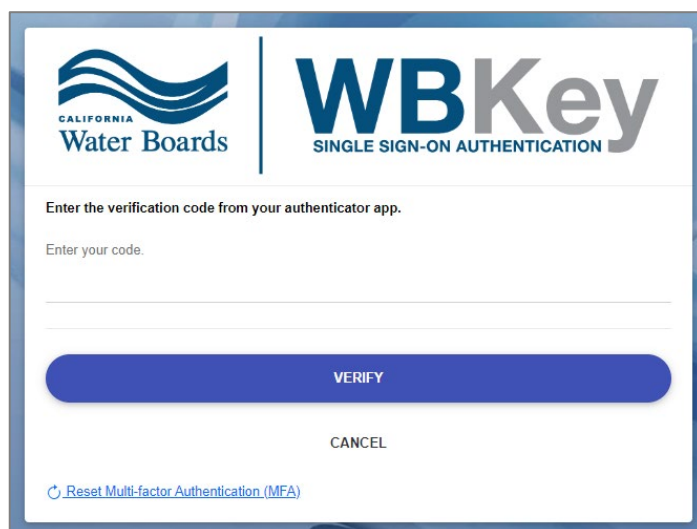nufacturers," and "Applications"** (shown in **blue box** below). Instructions for each tab are included in the following sections.
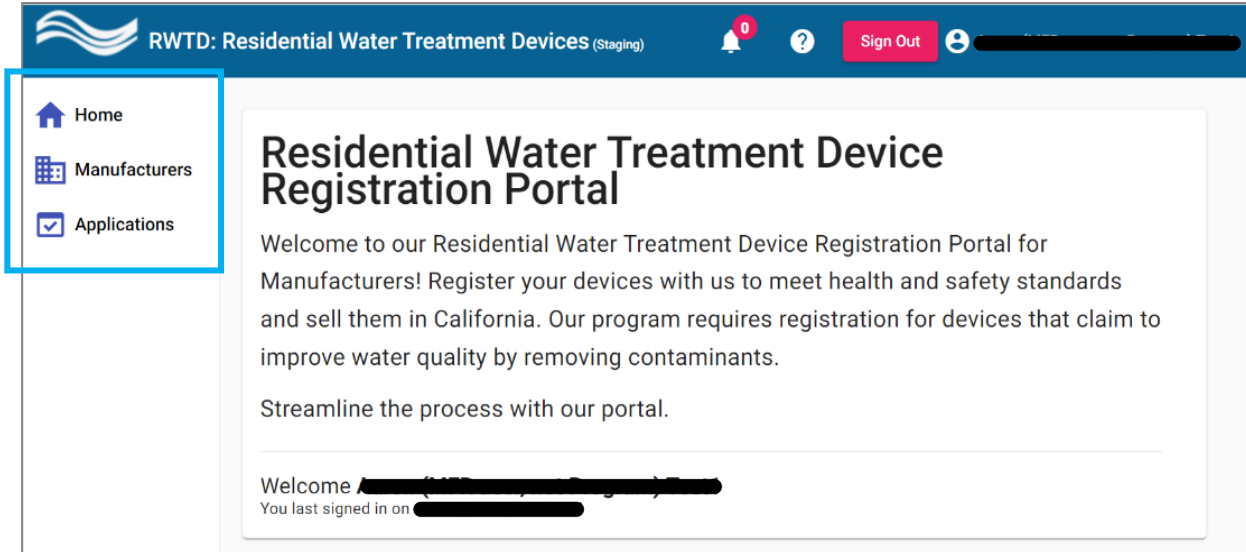
Figure 12: RWTD Registration Portal welcome page

2.1 Navigating the Manufacturer Account

Click on **"Manufacturers"** on the left side of the screen (see **Figure 12**) .

You will be taken to the **"Your manufacturers"** screen (**Figure 13**). The name of the manufacturer that you entered when applying for your WBKey account will be shown as a table entry (example manufacturer shown below beside the **blue arrow in Figure 13**).

Only the names of the manufacturers that you represent is shown on the table.

Figure 13: Your Manufacturers screen in RWTD Registration Portal

On the example screen shown in **Figure 13**, the **"Is Approved"** column reads **"Approved"** to indicate RWTD staff have approved the manufacturer account. The words **"Not Approved"** will appear if the account has not been approved. Registration application process can be started only for **"Approved"** manufacturers.
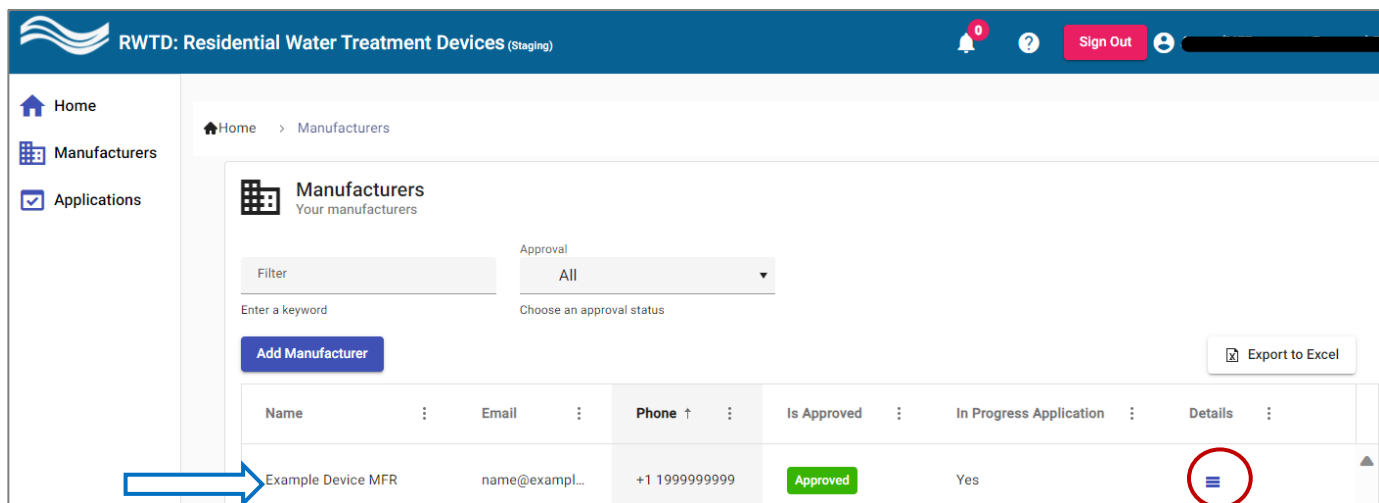
2.2   Adding another Manufacturer to your Account

When establishing your WBKey account, you will be able to associate your account with only **one** manufacturer.

To add an additional manufacturer to your account, email the RWTD Program staff at WTDevices@waterboards.ca.gov for assistance.

2.3   Entering Information into the Manufacturer Account

On the **"Your manufacturers"** screen, click the three horizontal lines in the **Details** column for your manufacturer (shown in **Figure 13 circled in red**). The **"Manufacturer Details"** page will appear. See **Figure 14**.
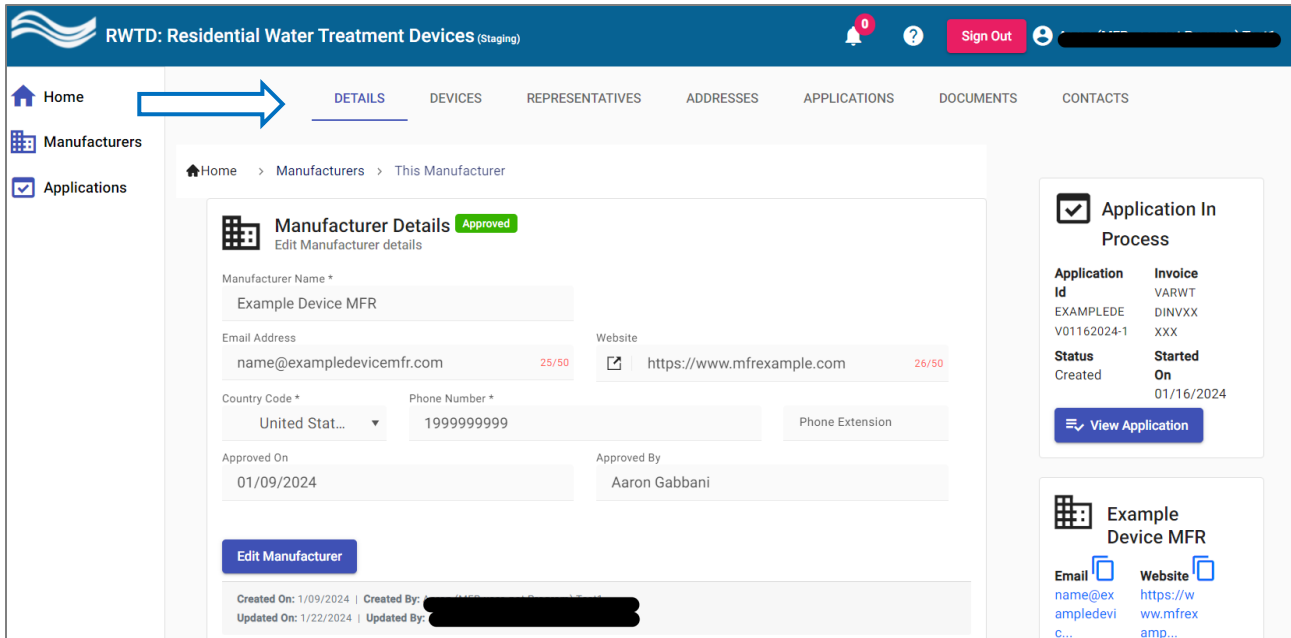
Figure 14: Manufacturer Details screen in RWTD Registration Portal

On the top of the screen, there are several tabs (shown in **Figure 14** noted by **blue arrow**). Instructions and information pertaining to each tab are noted below.

- **DETAILS.** The **"Details"** tab contains contact information for the manufacturer. If needed, this information can be edited by clicking the **"Edit Manufacturer"** button.

- **DEVICES.** In the **"Devices"** tab, a user can pre-load device information for currently registered devices and brand new devices that may then be pulled onto their next application via a dropdown menu on the application.

  - Currently registered devices have been migrated to the RWTD Registration Portal so that the existing Device Registration Number is preserved and can be accessed in the table just below the "Add Device" button. Click on the details button (three horizontal lines) to start entering the details of a device.

  - To pre-load device information for a new device, after you click the Devices tab, click the purple "Add Device" button to bring you to the "Device Details" page (See **Figure 15**).

  - Enter device information in the "**Device Details**" page. Required information is noted by an asterisk (*). Clicking on some fields will reveal dropdown menus.

  - Note that when entering information in the Technologies and Replacement Elements sections (see **Figure 16**), there is a check mark at the end of the row (shown in **Figure 16** beside the blue arrow) that must be clicked to save the entered information. To enter multiple Technologies or Replacement Elements, after clicking the check mark to save the entered information, click the plus sign in the gray square (shown in **Figure 16** beside the red arrow) to add another item.

- When all device information has been entered, click the **"Save"** button to save your information. Later, when filling out an application, you will be required to upload a copy or add a link to the device's Performance Data Sheet, the certifying organization's listing for the product, and, optionally, the exterior packaging.

- **Manufacturers can submit multiple devices in one application.** To add additional devices, click the **Devices** tab at the top of the screen, then click the **"Add Device"** button again.

- When RWTD staff approve an application (i.e., change the application status to **"Completed"**), the device information entered on the application will be stored in the corresponding device's record on the Devices tab. The user can then access the device information on this tab for use in future renewal applications.
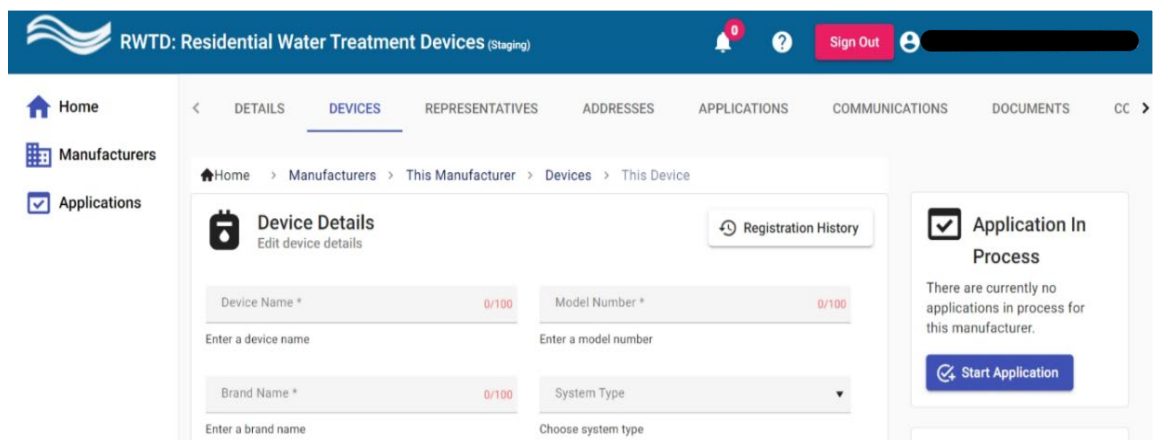

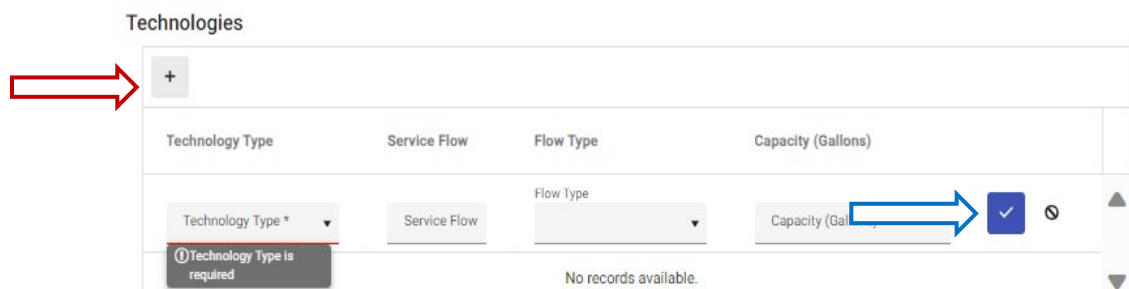Figure 15: Device details screen in RWTD Registration Portal

Figure 16: Technologies fields entry in Device details screen

- **REPRESENTATIVES.** Information on the **"Representatives"** tab mirrors the information submitted when applying for a WBKey account. Information here can be edited by updating your WBKey account, which can be done by visiting the WBKey Homepage and clicking the **"Manage Your WBKey Account"** button.

- **ADDRESSES.** Use the **"Addresses"** tab to enter the manufacturer's address or update an existing manufacturer's address. To add a new address, click the **"Add Address."** To edit or update an existing address, click on details.

- **APPLICATIONS.** The **"Applications"** tab lists all applications, regardless of status, created by the manufacturer. (For more information, see **Section 3** below.)
- **DOCUMENTS.** The **"Documents"** tab contains all documents submitted with previous registration application(s).
- **CONTACTS.** Manufacturers can save contact information of individuals other than the established representative on the **"Contacts"** tab. Contact information in **"Manufacturer Contacts"** is optional and can be left blank.

3. Completing an Application

Click **"Applications"** on the left side of the screen. This will take you to the "**Applications**" (**"Your applications"**) screen.

First-time users will see no application listed. If a Manufacturer account has yet to be approved by RWTD staff, then the **"Add Application"** button will be grayed out. The button will be purple if the account has been approved and an application can be started.

3.1   Entering Application Information

After clicking **"Applications,"** click the purple **"Add Application"** button (**Figure 17**).

Add Application

Figure 17: Add Application button

This will take you to **"Application Details"** screen (**Figure 18**) where you will select the name of the manufacturer and answer whether the packaging of the listed device(s) contains proper decal requirements.

Figure 18: Application Details welcome screen in RWTD Registration Portal

Note: If the manufacturer that you have previously represented is not found in the drop-down list, email the RWTD Program staff at WTDevices@waterboards.ca.gov for assistance.

After clicking the **"Save"** button, you will be brought to the **Application Details** screen (shown in **Figure 19**).

At the top of the screen, the Details, Devices, Communications, and Documents tabs are applicable only to the specific application.

The progress bar (shown in **Figure 19** noted by the **blue arrow**) tracks the progress of the application.
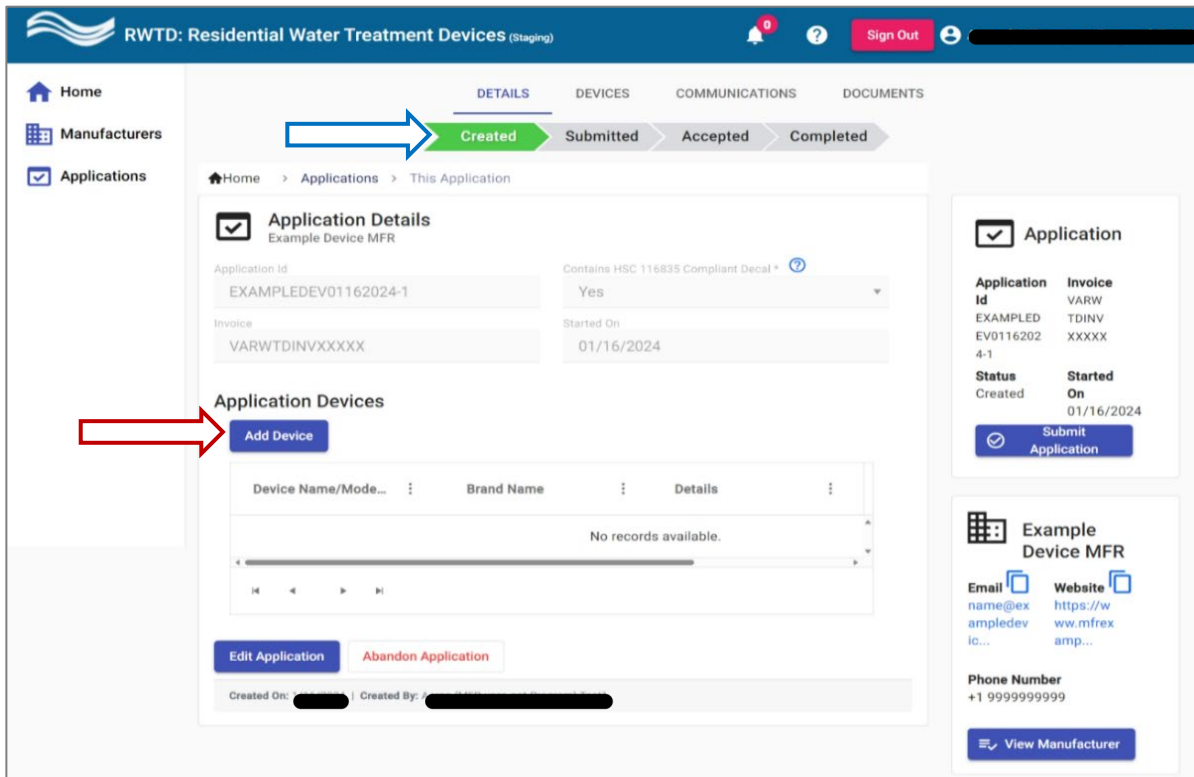

Figure 19: Application Details screen in RWTD Registration Portal

Click the purple **"Add Device"** button (shown in **Figure 19** noted by the **red arrow**) to bring you to the **Application Device Details** screen.

In **Application Device Details** screen (**Figure 20**), under **"Choose device"** field, manufacturers have the option to select a pre-loaded device name and model number along with its details (previously entered under the **Manufacturer Devices** tab) or to enter a new device, by toggling **"Add New Device"** (shown in **Figure 20 circled in blue**). If a new device name and model number is entered, manufacturer can fill in the device information.
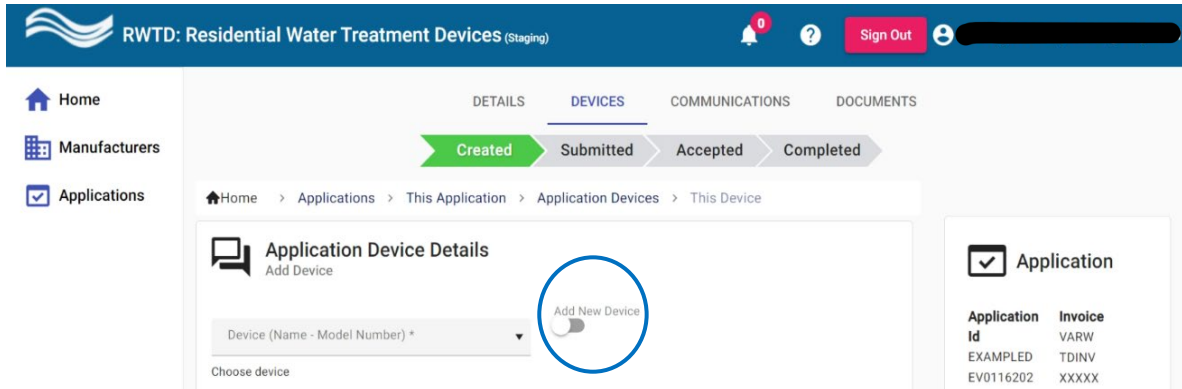
Figure 20: Application Device Details - Add Device entry

Important Note on Certification Dates

If a device is certified under multiple standards, i.e., NSF/ANSI 42 and NSF/ANSI 53, enter the certification that expires first. If a device's existing certification period expires prior to the annual registration period (typically, January 31), then the device registration period will be adjusted to match the certification end date. The manufacturer can subsequently submit updated certification results to extend the registration period to cover the remainder of the registration period; failure to submit updated certification result/information in a timely manner will result in the device being removed from the State Water Board's list of registered devices.

In the **"Supporting Documentation"** entry (**Figure 21**), you have the option of providing a website or uploading a document (pdf, zip file, or Word). It is **preferred** that URLs be provided for the on-line performance data sheet and the certifier's on-line certification listing for the product. If on-line listing is not available, the supporting documents can be uploaded. To upload a document, click the **"Upload"** toggle, after which fields to title and upload a document will appear.
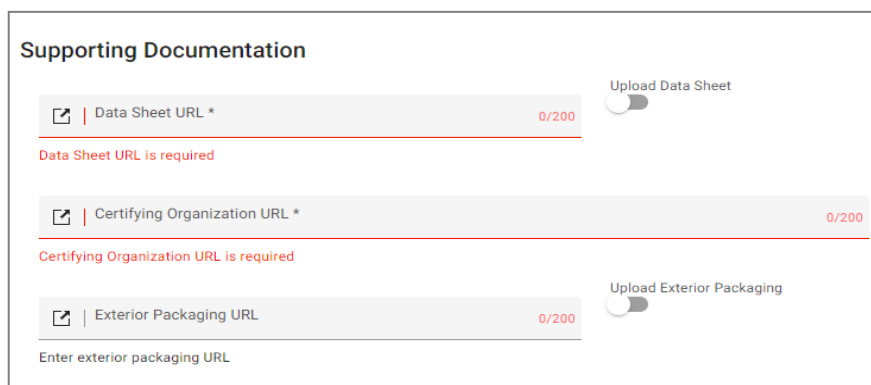

Figure 21: Supporting Documentation entry in Application Device Details

To start entering **"Technologies"** or **"Replacement Elements"** information, start by clicking the gray (+) button on the upper left-hand corner (shown below next to the red arrow). Check mark at the end of each row must be clicked to save the entered information. **"Technologies"** entry is shown in **Figure 22**, check mark is **circled in blue**.
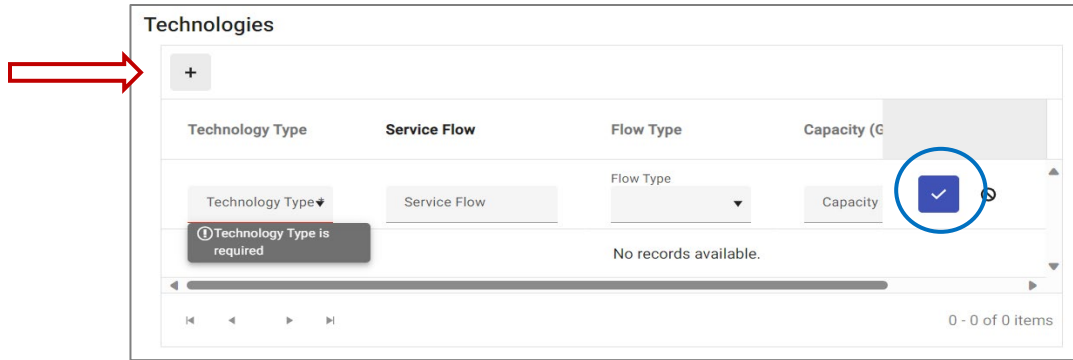
Figure 22: Technologies entry in Application Device Details

To enter multiple **"Technologies"** or **"Replacement Elements,"** after clicking the check mark to save the entered information, click the plus sign in the gray (+) box (shown in **red arrow** in **Figure 22**) to add another item.

Once all entries are completed, click **"Save"** at the bottom of the screen to save the record. If there are errors, the missing or erroneous information will be shown in red text and must be corrected.

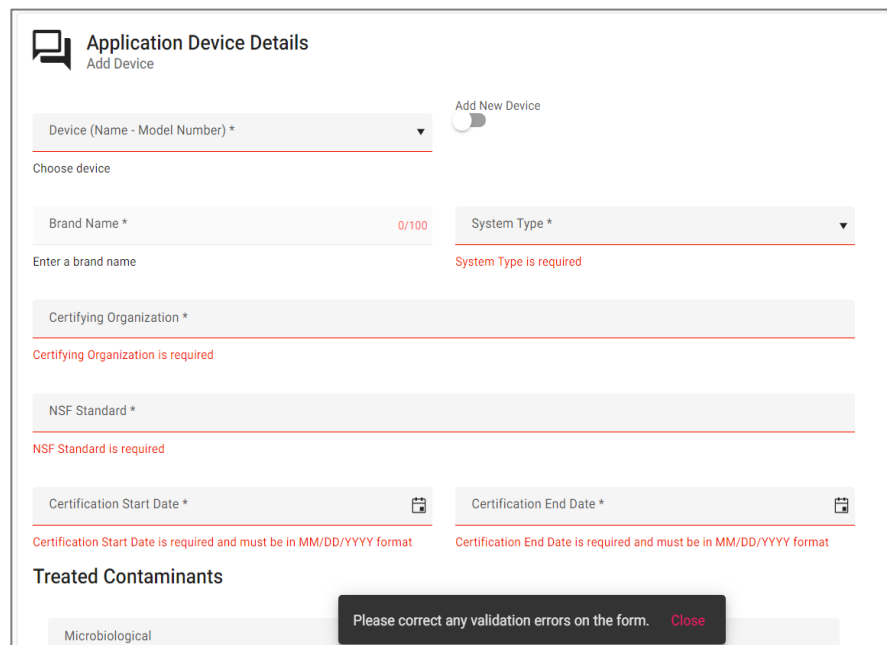An example of **"Application Device Details"** screen with missing information is shown in **Figure 23**.

Figure 23: Application Device Details screen with missing information

To add additional devices, click the "**Devices**" tab (see **Figure 24**) at the top of the screen (**red arrow**), then click the purple **"Add Device"** button (**blue circle**).
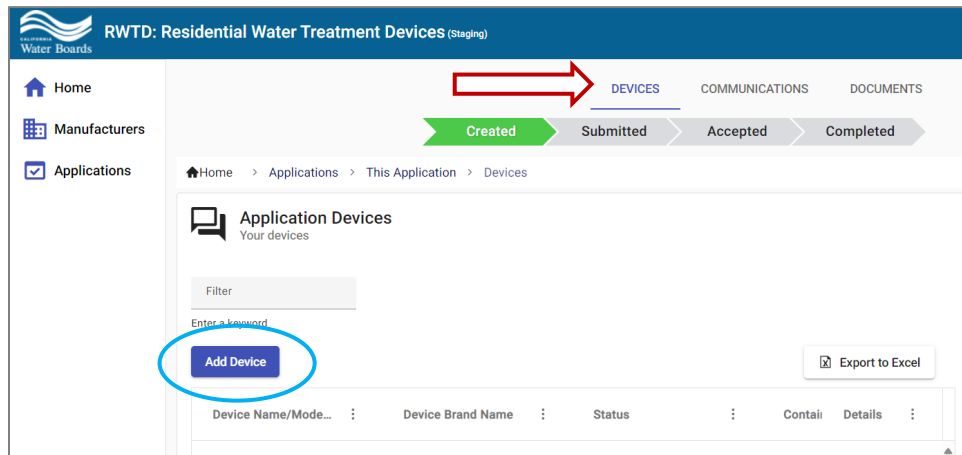

Figure 24: Application Devices screen in Devices tab

Please note that if a device has an alternate filter cartridge with different claims or capacity, then a separate registration (i.e., a separate device entry) is needed.

3.2   Submitting the Application

When all application information has been entered, click the **"Submit Application"** button located within the Application status box on the right side of the screen. A pop-up window will appear (**Figure 25**). Please review the information in the pop-up window and click "Submit Application" again to agree to the terms and complete the submission.
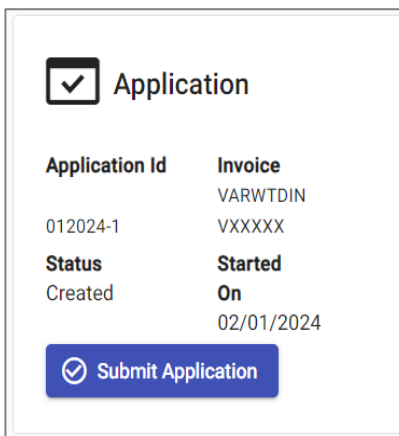

Figure 25: Application status pop-up box

You will receive an automated confirmation email noting the application has been submitted. RWTD Program staff will review your application and contact you if any additional information or documentation is needed.

3.3 Monitoring Application Status

To check the status of an application, log into your RWTD Registration Portal account and click **"Applications"** on the left side of the screen. This will take you to the applications in **"Your applications"** screen.

The status of an application is listed in the status column. Application status types are listed below.

- Created = Application has been created/started by manufacturer, but has not been submitted to RWTD Program staff

- Submitted = Application has been submitted for RWTD Program staff review

- Accepted = Application has been reviewed and accepted by RWTD Program staff, and is awaiting manufacturer payment or awaiting State Water Board payment processing

- Completed = Registration process has been completed

- Abandoned = Application has been abandoned by manufacturer

- Rejected = Application has been rejected by RWTD staff due to a deficiency that has not been addressed by the manufacturer

3.4 Abandoning an Application

An application can be abandoned by clicking the **"Abandon Application"** button.

To locate the button, click on "Applications" on the left side of the screen, click the three lines in the Details column of the application you would like to abandon, and then click the "Abandon Application" button (shown in **Figure 26** noted by the **blue arrow**).

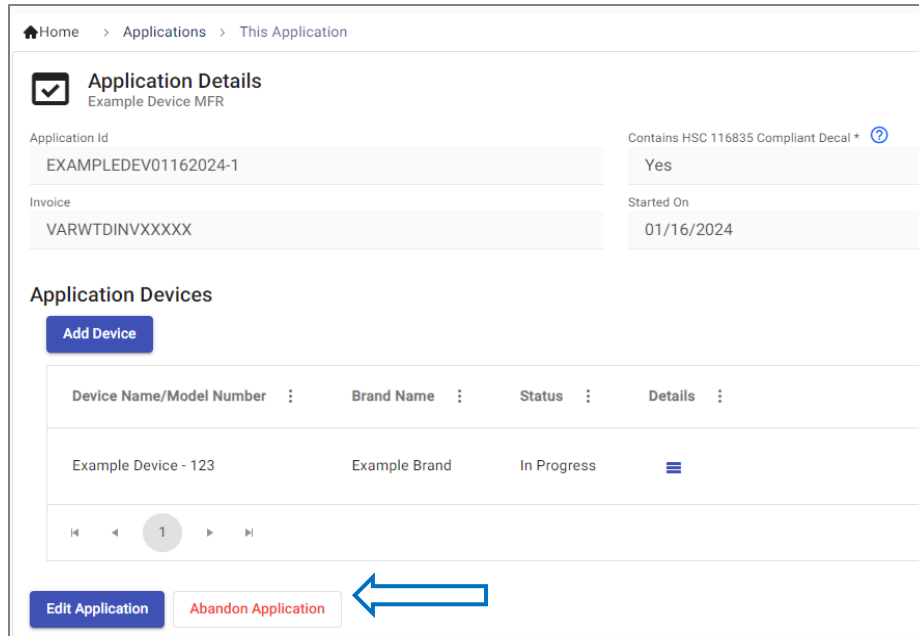Once an application is abandoned, it cannot be recalled.

Figure 26: Application Details screen

3.5 Rejected Application

When a submitted application is rejected by RWTD Program staff due to a deficiency, you will receive an email informing you that the application has been rejected with a reason for the rejection.

You may access the rejected application via the RWTD Registration Portal, make any corrections, and resubmit it for RWTD Program staff review.

4. Submitting Payment for Device Registration

Upon RWTD Program staff approving an application, the application status will change to **"Accepted."** You will then receive an email containing an invoice for registration payment. Follow the instructions in the email to make the payment.

After payment is received and processed by the State Water Board, the application status will change to **"Completed."**

You will then receive another email informing you that your device or devices have been successfully registered with the RWTD Registration Program.

5. Identifying the Dates of Registration

Log into the RWTD Registration Portal, then click on **"Manufacturers"** on the left side of the screen.

Click the three lines in the Details column of the manufacturer.

Click the Devices tab at the top of the screen, and then click the three lines in the Details column of the device.

Click on the **"Registration History"** tab (shown in **Figure 27** beside the **blue arrow**), and a window will pop up to display the start and end dates for the device.
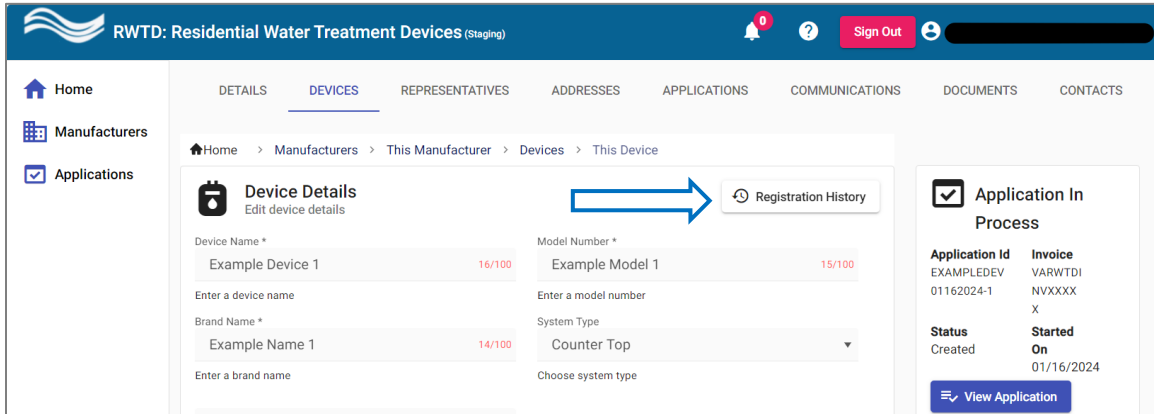

Figure 27: Device Details screen in RWTD Registration Portal

6. RWTD Program Contact

RWTD Program staff email:

WTDevices@waterboards.ca.gov