

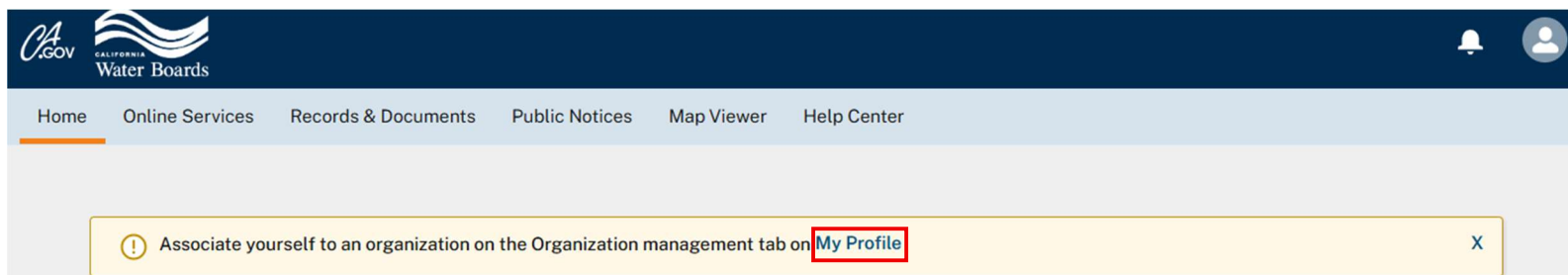
Creating New Organizations in CalWATRS

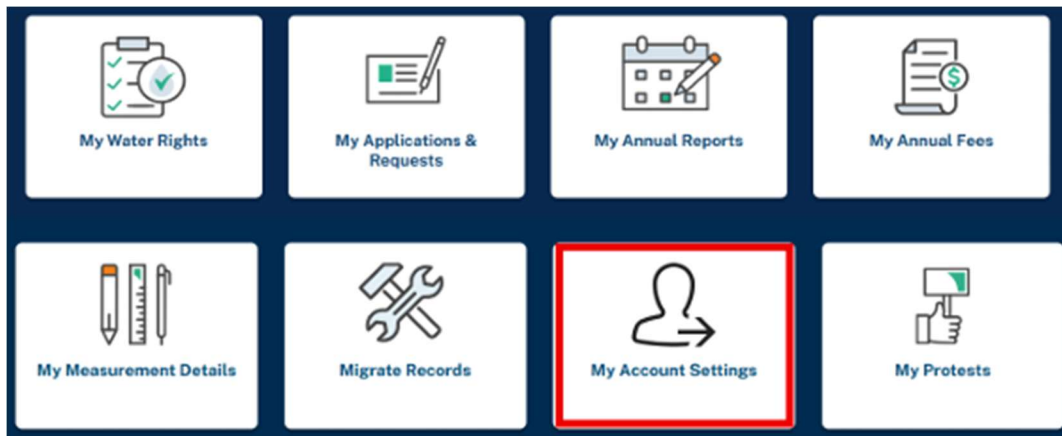
This guide walks through how to create and join a new organization in CalWATRS. Before you begin, please review the following information:

- A CalWATRS account is required to access most water rights online services, including annual water diversion and use reports.
- If you are part of a business, government agency, or other group, your organization will not have its own CalWATRS account. Each member of the organization will create their own individual account. You can learn more about Organizations in CalWATRS online at bit.ly/CalWATRS-guides.
- If your organization already owns water rights or otherwise exists in our system, please contact CalWATRS-Help@Waterboards.ca.gov to have staff help connect your account to the organization records, you do not need to create a new organization.
- Before you can create a new organization in CalWATRS, an individual account must be created. Please see our [Guide to Creating a CalWATRS Account](#) resource guide for instructions on how to do this.
- If you are going to submit forms in CalWATRS as an organization, please create the organization before starting any forms, including changes of ownership.
- As CalWATRS continues to improve, the system may look a little different. Don't worry if the images in this guide aren't identical to what you see on the screen, the process is generally the same.

How to Create a New Organization in CalWATRS in Six Steps

Step 1: Sign in to your CalWATRS account and navigate to My Account Settings. You can do this by clicking the “My Profile” link in the banner at the top of your home page OR you can click the “My Account Settings” tile at the bottom of your home page (both options will take you to the same place).





Step 2: On the My Account Settings page, click the “Organization management” button on the left hand side of the page.

Step 4: Select the options indicating that you are creating a “New” Type of organization.

Type of organization* 

☒ New ☐ Existing

Step 5: Fill out the required fields. Required fields will be marked with a red asterisk *. Note that email address fields are optional. Do not use the same email address(es) used to create individual accounts. Click submit when finished.

Organization information

Organization Name *	Legal Entity Type *
Email Address	Confirm Email Address ⓘ
Organization Address *	
City *	State *
	California
Country *	Zip *
United States	
Phone Number	
Is your billing address same as your mailing address? *	
☐ Yes ☐ No	

Submit

A banner informing you of your request to join the organization should appear at the top of the page. Refresh the page to complete the process and remove the banner.

Your request to join the existing organization has been successfully recorded. You will receive a notification when your request has been approved. (Email and Bell notifications both)

Water Board

Home Online Services Records & Documents Public Notices Map Viewer Request Public Records Help Center

My Account Settings > Organization management

My Account Settings

Use the Account Settings menu below to update your personal information, security, and preferences.

Profile
Password & Security
Contact Preferences
Addresses
Organization management

Associate to an Organization

Select if you are joining an existing organization or if you need to submit information to create a new organization. If you select existing, you will be able to search for organization name in the system.

Type of organization:

☐ New ☒ Existing

Organization information

Organization name

Waterboard Trustee

You have requested to join Waterboard Trustee. If you wish to cancel the request please click below.

[Cancel request](#)

Step 6: Confirm your organization information is correct. To do this, click the “Organization management” button again. You should now have access to your organization management tabs. To review or edit your organization information, click the “Edit organization details” button.

Profile
Password & Security
Contact Preferences
Addresses
Organization management

Organization details
Organization members
Organization requests

Organization details

Organization name

Waterboard Trustee

Legal entity type

Estate

Email

noidea@noidea.com.invalid

Phone

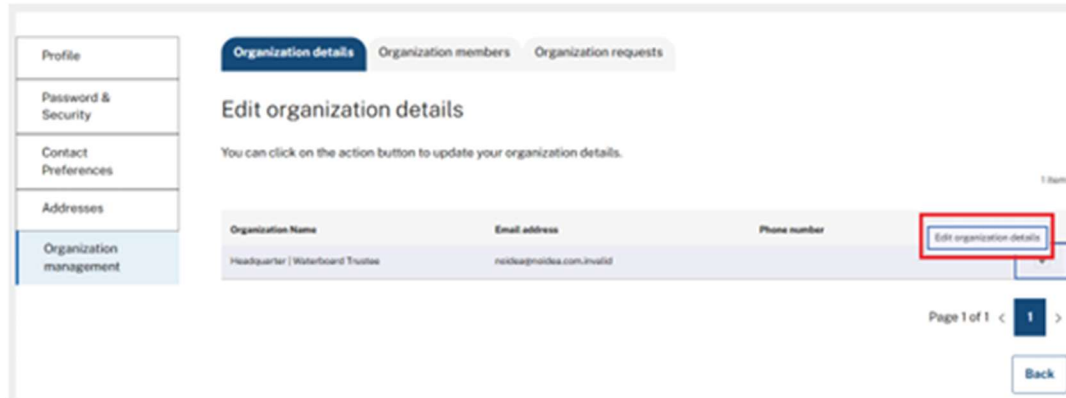
Details of organization hierarchy

Organization name	Email	Phone	Default mailing address	Default billing address
Headquarter (Waterboard Trustee	noidea@noidea.com.invalid		5000 K ST, SACRAMENTO, California, United States, 95819	5000 K ST, SACRAMENTO, California, United

[Add branch](#)

[Edit organization details](#)

On the next page, click on the down arrow in the table. This will bring up a new “Edit organization details” button. Click on this button.



Make sure your email address and phone number are correct. Please note: the email address listed here is different from your CalWATRS sign in email. The email you enter here cannot be associated with another CalWATRS account. You may leave this blank. Click “Save” when you are done.

How to Add People to Your Organization

After your organization is activated, other people (called employees in CalWATRS) can join as follows:

A. The employee follows steps 1 through 3 above to create an account and navigate to the “Organization management” page.

B. From there, the employee indicates that they are joining an existing organization, but they do **NOT** have a PIN. The employee searches for their organization, selects it from the list, and clicks “Submit”.

The screenshot shows the 'My Account Settings' page with a sidebar menu on the left containing 'Profile', 'Password & Security', 'Contact Preferences', 'Addresses', and 'Organization management' (which is highlighted). The main content area is titled 'Associate to an Organization' and includes instructions: 'Select if you are joining an organization that already exists in CalWATRS or if you need to submit information to create a new organization in the system. If you select existing, you will be able to search by organization name and your request to join must be approved in CalWATRS by one of the organization's admins. If you need assistance, please email our-upward@waterboards.ca.gov.' Below this, there is a section for 'Type of organization' with radio buttons for 'New' and 'Existing' (selected). Another section asks 'Do you have a PIN?' with radio buttons for 'Yes' and 'No' (selected). The 'Organization name' field contains 'state water n', and a dropdown menu shows suggestions: 'Headquarters: 08 STATE WATER RESOURCES CONTROL BOARD - Sacramento - 08081' and 'Headquarters: STATE WATER RESOURCES CONTROL BOARD - Sacramento - 08082'. A 'Submit' button is at the bottom right.

A banner informing them of their request should appear at the top of the page.



C. Before the employee can access the organization’s records, the administrator must accept their request. To do this, the administrator navigates to the “Organization requests” tab and uses the “Action” arrow in the table to approve the employee’s request to join.

My Account Settings

Use the Account Settings menu below to update your personal information, security, and preferences.

Profile

Password &
Security

Contact
Preferences

Addresses

Organization
management

Organization details

Organization members

Organization requests

Organization requests

1 item

Organization Name	Name	Email address	Phone number	Role	ACR status	Request type	Action
Headquarter Waterboard Trustee	Ten Six	calwestrust-204@gm mail.com		Employee	Inactive	Add employee	

Page 1 of 1 < 1 >