



MS Fees Invoicing Software Training

July 28, 2022

MS Fees Invoicing System Training Agenda

- Background - Training and Resources
- How to initiate an account.
 - ✓ Manufacturer Account Administrator
 - ✓ Member Accounts
- MS Fees Account Management
- How to Create an Invoice
- Attestation: Manufacturer's Approval
- After Payment Processes – Invoice adjustment
- Lessons Learned Since April 1
- System "Go Live" – Monday August 8th

Training and Resources

<https://ww2.arb.ca.gov/mobile-source-certification-and-compliance-fee-regulation-meetings-workshops>

- How to use the MS Fees Invoicing Software
 - Today's Presentation (July 28, 2022)
 - User Manual
- Regulation development and workshops
 - Program Overview – March 8, 2022 Training
 - Invoicing Tutorials and Training (March 21-24, 2022)

ww2.arb.ca.gov/mobile-source-certification-and-compliance-fee-regulation-meetings-workshop

Update Available August 8, 2022

Mobile Source Certification and Compliance Fee Regulation: Meetings & Workshops_MOCK

CONTACT

Email helpline@arb.ca.gov

Phone (800) 242-4450

The Mobile Source Certification and Compliance Fee regulatory effort was initiated in response to new regulatory authority. SB 854 (2018) allowed CARB to adopt a schedule of fees to cover all or a portion of the State Board's reasonable costs. AB 85 (2019) authorized CARB to adopt a schedule of fees to recover reasonable costs from on-road vehicles and engines, removing the fee cap in HS Code 43019 for existing on-road vehicle and engine fees. The Mobile Source Certification Fee Regulation was approved by the Board in April 2021 and will be implemented beginning April 1, 2022. The regulatory support documents for the Mobile Source Certification and Compliance Fee regulation are available on the [Rulemaking Activity](#) web page. This page summarizes the regulatory activity, outreach, and other activities for the implementation of the Mobile Source Certification and Compliance Fees. For past regulatory activity [go here](#).

If you would like to participate in future meetings, or get future workgroup announcements, subscribe to the [Mobile Source Certification and Compliance Fee Regulation Topic](#). For general questions on this regulation, interested parties may contact [Kathleen Mead](#).

On April 1, 2022, a new and modified mobile source certification and compliance fees (MS Fees) was due upon submittal of the application for mobile source certification.

Mobile Source Fee Implementation Resources

How Do I Pay My Fees?
MS Fee Payment Process for Manufacturers

Step 1-Obtain your CARB Customer Account Number

Before you start, obtain a CARB Customer account number.

For those manufacturers that do not know their CARB Customer account number, first check with your organization's internal points of contact (POC) who are responsible for payment to obtain a CARB Customer account.

If you cannot obtain the information from the manufacturer, send an e-mail to your assigned CARB certification staff:

- On and Off Road: Contact your assigned certification staff.
- Portable Fuel Containers and Evaporative Components (SORE): Michele Dunlop
- Evaporative Components (OHRV and SIMW): Scott Monday
- Aftermarket Parts: Trina Pendon
- Diesel Emission Control Strategies (DECS): Milad Pirhadi
- At-Berth: Milad Pirhadi

Change in Process

- We have a manual process today to submit invoices which is time consuming
- New process will generate invoices using a new software (MS Fees Invoicing Software)
- This presentation will walk through the new process and provide a demo for the new software

MS Fees Invoicing Software

What do I need to know before I start?

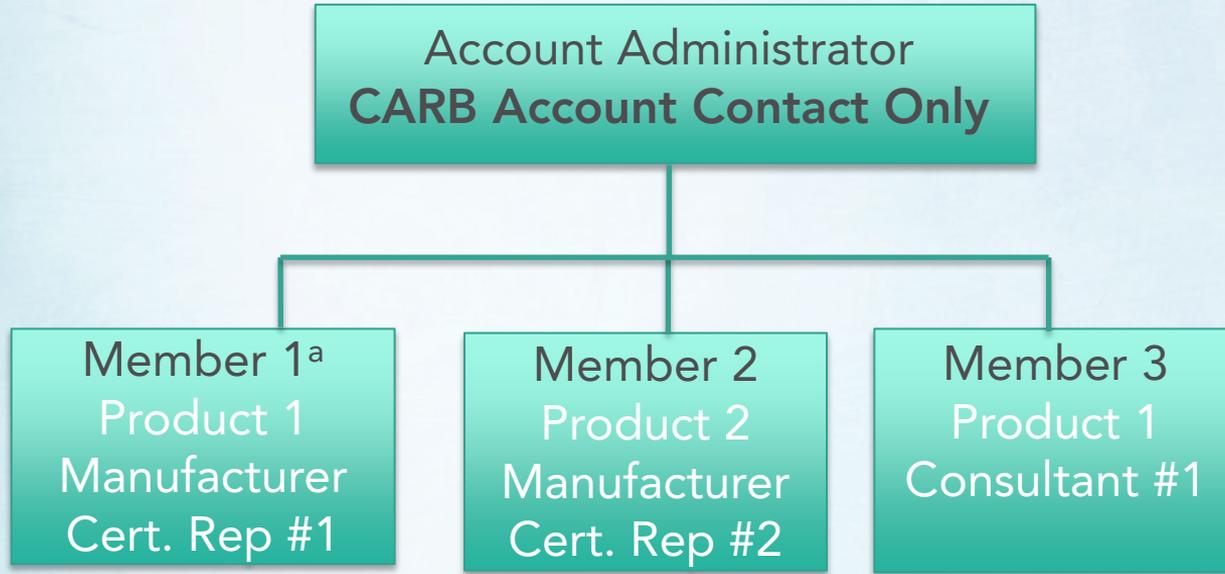
Checklist to get Started

- ❑ Identify an Account Administrator for your manufacturer account to create a Master Account
 - ✓ Know your CARB Customer Account Number!
 - ✓ **Only one** Master Account/Account Administrator allowed for each CARB Customer Account
 - ✓ The Account Administrator must be an authorized representative of the CARB Customer Account (no consultants)
 - ✓ The unique username (log-in) is the Account Administrator's e-mail address
 - ✓ The Account Administrator can add multiple Member Accounts (may include consultants)

What is my CARB Customer Account?

1. For existing manufacturers,
 - Use the same number that you are using today to generate invoices.
2. For new manufacturers,
 - Contact your CARB Certification representative
 - E-mail MSCertFees@arb.ca.gov

Hierarchy of Accounts



^a Account Administrator creates and provides the usernames for Member Accounts. Username must be unique through-out the system. Username base name on member relationship, product/company name, and member e-mail. Contact name and their e-mail can be used for several different Member Accounts.

Questions?

MS Fees Invoicing Software

Demo: Creating a MS Fees Invoicing Software Account

MS Fees Software Portal

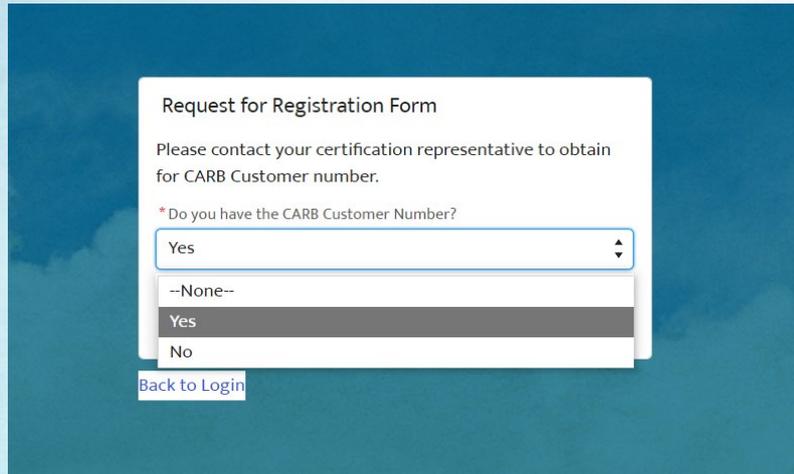
- <https://carb2.my.site.com/CARBPortal/s/login>



[Forgot your password?](#) [Request For Registration](#)

MS Fees Software Portal

- CARB Customer Account Information
- If no, follow steps in Slide #8 first!!!



Request for Registration Form

Please contact your certification representative to obtain for CARB Customer number.

* Do you have the CARB Customer Number?

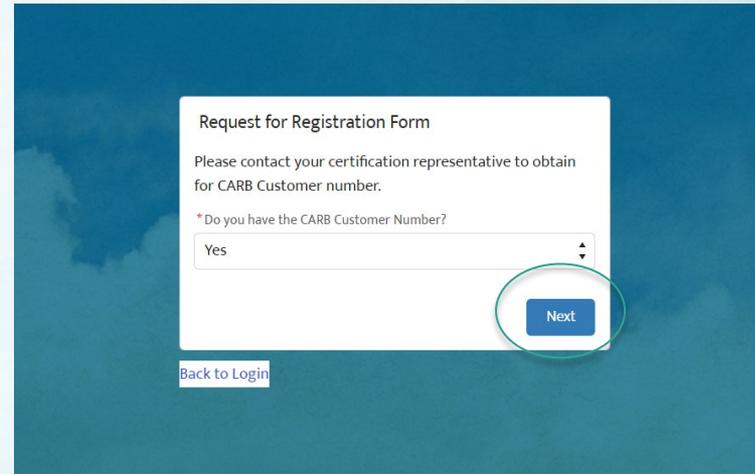
Yes

--None--

Yes

No

[Back to Login](#)



Request for Registration Form

Please contact your certification representative to obtain for CARB Customer number.

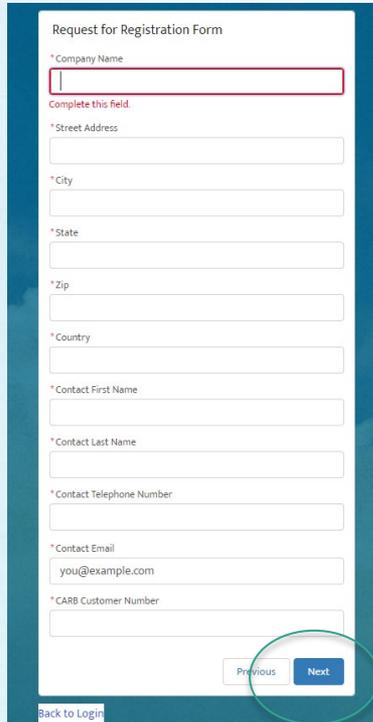
* Do you have the CARB Customer Number?

Yes

[Next](#)

[Back to Login](#)

MS Fees Software Portal



Request for Registration Form

* Company Name

Complete this field.

* Street Address

* City

* State

* Zip

* Country

* Contact First Name

* Contact Last Name

* Contact Telephone Number

* Contact Email

* CARB Customer Number

[Previous](#) [Next](#)

[Back to Login](#)

The information entered must be the same as what is on file at CARB for your account acceptance.

Account Acceptance

- Click “next” to submit your information. CARB will review and approve or reject your account. Check your junk/spam folders for all communication if it is not received in your inbox of the e-mail address listed.

Approval: “Your request for registration has been approved by CARB team. You will receive a welcome email for setting up portal credentials. Please check your spam folder.”

Rejection: “Your request for registration has been rejected by CARB team. CARB team comments:
Duplicate CARB Customer account”

Welcome to CARBPortal

- An email will be sent to the e-mail listed in your request to set up your password. Remember to check your junk/spam files.

Welcome to CARBPortal! To get started, go to
Reset Password <[link to set up password](#)>
Username: E-mail address set up in account
Thanks,
State of Ca Air Resources Board

Welcome to CARBPortal

CA.GOV

Change Your Password

Enter a new password for **kathleen.mead@arb.ca.gov**.
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

..... Good

* Confirm New Password

..... Match

Change Password

Password was last changed on 12/07/2022, 1:26 pm.

© 2022 salesforce.com. All rights reserved.

The link will send you to “Change Your Password.” Complete the requested information and click on “Change Password.”

Remember to check your spam/junk file for the e-mail.

Issues

- I do not have a CARB Customer Account (Slide 8).
 - ✓ If CARB doesn't have an account for your company, fill out the CARB Customer request in the system (select no, on slide #13).
- I didn't get an e-mail.
 - ✓ Check your junk/spam files. If not there, your company computer security system may block.
 - ✓ If you do not receive a portal request your e-mail address may already be in use.
 - ✓ E-mail MSCertFees@arb.ca.gov

Questions?

MS Fees Invoicing Software

Account Management

Managing Your Account



Create Invoice

All Invoices

Contact

Kathleen Mead ▾

- Home
- My Profile
- My Account
- Account Management
- Logout

Submitted Invoices

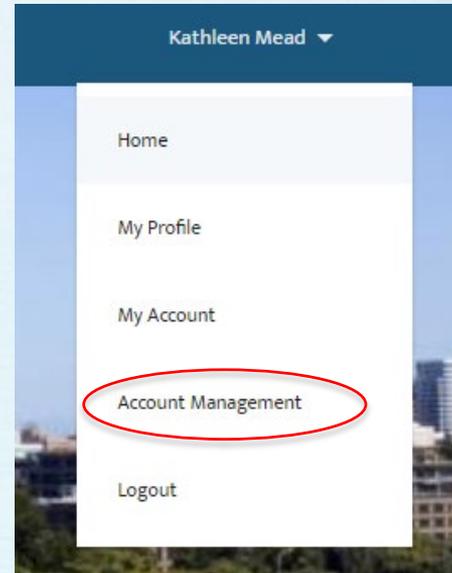
Invoice Name ▾ | Name ▾ | Form Type ▾ | Total Payment ▾ | Invoice Type ▾ | Status ▾ | Invoice Date

Draft Invoices

Name ▾ | Form Type ▾ | Total Payment ▾ | Invoice Type ▾ | Status ▾ | Created By ▾ | Created Date ▾

Only Account Administrator's Account

- Account Management button only available for Account Administrator so they can create/edit/deactivate Member accounts



Manage Member Accounts

Members

Members Add Member

9 items ⚙️ ⏴

Full Name	Email	Title	Active	
Byron Ng	byron.ng@arb.ca.gov		<input checked="" type="checkbox"/>	⏴
Tony La	tony.la@arb.ca.gov		<input checked="" type="checkbox"/>	⏴
Janie Han-Luu	janie.han@arb.ca.gov		<input checked="" type="checkbox"/>	
Alan Chow	alan.chow@arb.ca.gov		<input type="checkbox"/>	
Michael Lin	michael.lin@arb.ca.gov		<input checked="" type="checkbox"/>	
Tony La	tony.la@arb.ca.gov		<input checked="" type="checkbox"/>	

- Deactivate
- Edit Member
- Reset Password
- Manage Permissions

Activities Only Available for the Account Administrator

- “Add member” is used to create member account
- Drop down for each account
 - Deactivate member account
 - Edit member account
 - Reset member account password
 - Manage permissions – not available

Creating Member Accounts

The image shows a user interface with a dark blue header. On the left, a user profile dropdown menu is open for 'Kathleen Mead', listing options: Home, My Profile, My Account, Account Management (circled in red), and Logout. The main content area has a dark blue navigation bar with 'Home', 'About Us', 'Contact', and 'Byron Ng' (with a dropdown arrow). Below this is a wide landscape image of a city skyline. At the bottom, a 'Members' section is visible, featuring a table with columns for Full Name, Email, Title, and Active. An 'Add Member' button is circled in red in the top right corner of the members section.

Kathleen Mead ▾

- Home
- My Profile
- My Account
- Account Management
- Logout

Home About Us Contact Byron Ng ▾

Members

Members

9 items

Full Name	Email	Title	Active
-----------	-------	-------	--------

Add Member

New User

Basic Information

* Name

First Name

Middle Name

* Last Name

Suffix

* Email

* Username

* Alias

Title

Phone

* Profile



To create a new member, the username must be **unique** and meet the following format:

“CNS” or “MFR”_ ARB

Manufacturer Code_ **e-mail** address of member

CNS=Consultant

MFR=Manufacturer staff

Examples:

CNS_CUMX_Jsmith@jsmithco.com

MFR_TOTA_fredjames@toyota.com

CNS_DON_jsmith@jsmithco.com

If a member requires multiple accounts with different manufacturers, the username must be different for each Manufacturer Master Account.

Creating Member Accounts

- Created by Account Administrator
- Accounts based on Username, not e-mail
 - Use a descriptor to describe the relationship with the company (CNS=Consultant; MFR=Manufacturer)
 - ARB Manufacturer Code or product/manufacture name
 - E-mail address of member
- An e-mail is sent to the member's e-mail listed in the account, with a link to the portal to create their own password.

Deactivate Member Accounts

- Cannot delete accounts
- Must activate or deactivate accounts as needed

Members

9 items

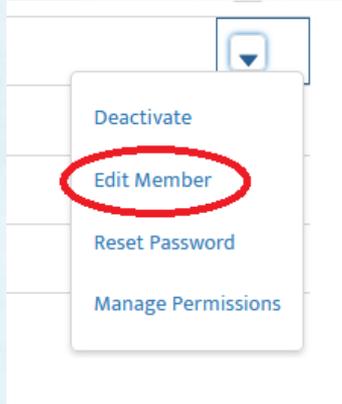
Add Member

⚙️ ▼

Full Name	Email	Title	Active	
Byron Ng	byron.ng@arb.ca.gov		<input checked="" type="checkbox"/>	
Tony La	tony.la@arb.ca.gov		<input checked="" type="checkbox"/>	
Janie Han-Luu	janie.han@arb.ca.gov		<input checked="" type="checkbox"/>	Deactivate
Alan Chow	alan.chow@arb.ca.gov		<input type="checkbox"/>	Edit Member
Michael Lin	michael.lin@arb.ca.gov		<input checked="" type="checkbox"/>	Reset Password
Tony La	tony.la@arb.ca.gov		<input checked="" type="checkbox"/>	Manage Permissions

Edit Member Accounts

- Edit contact information



Edit User

* Name

First Name
Byron

Middle Name

* Last Name
Ng

Suffix

* Email
byron.ng@arb.ca.gov

* Username
cns_meadmotors_byron.ng@arb.ca.gov

* Alias
BNg

Title
Consultant

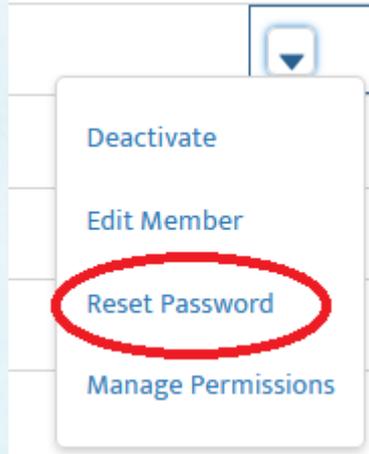
Phone
9163249550

* Profile
Manufacturer Contact

Cancel Save

Reset Member Accounts Password

- Manually reset password for subaccount



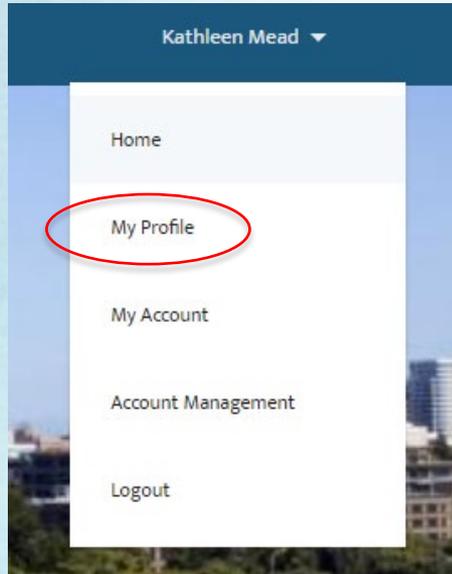
Manufacturer Administrator can force a password reset using this action.

An e-mail is sent to the member at the e-mail address in the account to reset the password.

Access for All Accounts

- My Profile
- My Account
- Contact
- All Invoices
- Create Invoice

My Profile



Edit User

About

*** Name**

First Name

Middle Name

*** Last Name**

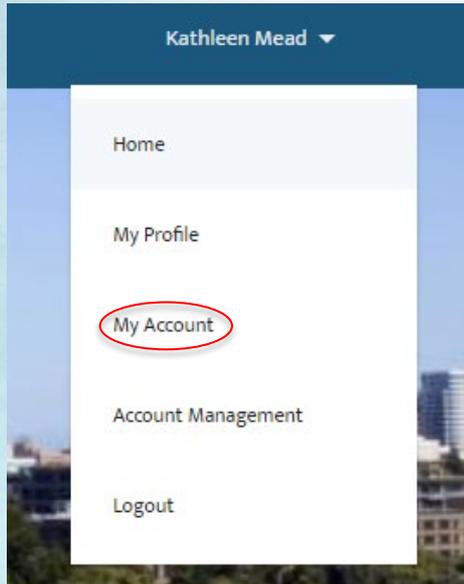
Suffix

Manager

Title

Company Name

My Account



Account
Mead Motor Parts and Equipment

Phone Billing Address Website Account Owner
[Furqan Hassan](#)

DETAILS RELATED

Account Name
Mead Motor Parts and Equipment

Account Owner
[Furqan Hassan](#)

Type
Parent Account

Website
Phone

Description
Industry

Employees

▼ Address Information

Billing Address Shipping Address

▼ System Information

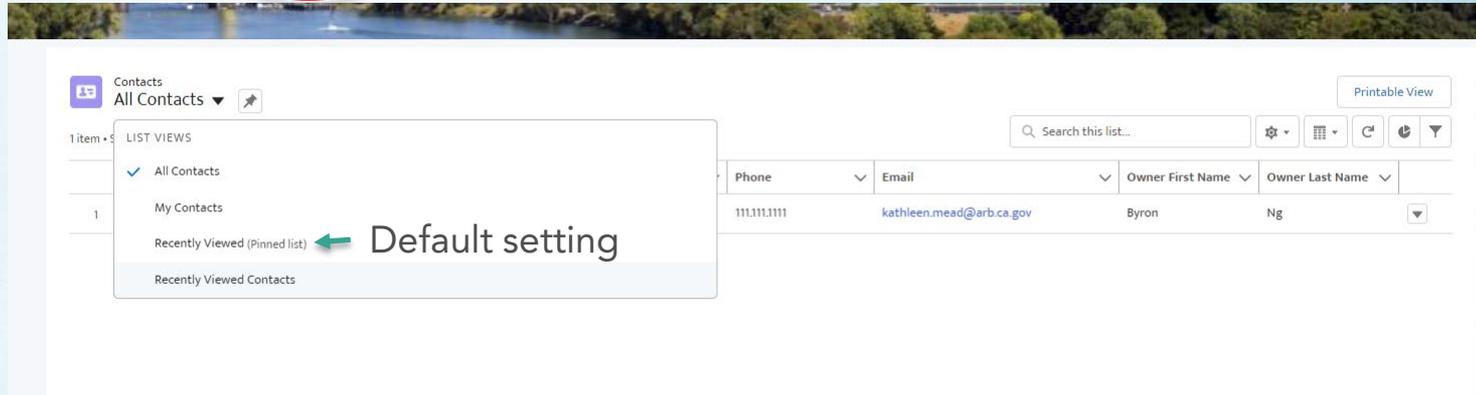
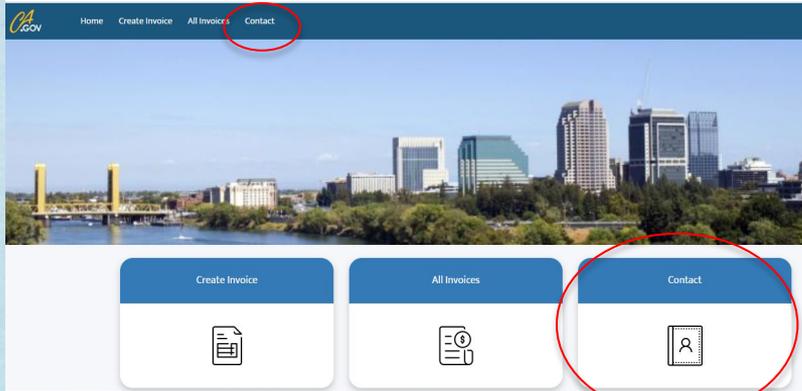
Created By
[Byron Ng](#) , 12/07/2022, 1:26 pm

Last Modified By
[Byron Ng](#) , 15/07/2022, 12:55 pm

▼ Custom Links

[Google Maps](#) [Google News](#) [Google Search](#)

Contact



Questions?

MS Fees Invoicing Software

Demo: Creating an Invoice

[Create Invoice](#)[All Invoices](#)[Contact](#)

Submitted Invoices

Invoice Name ▾	Name ▾	Form Type ▾	Total Payment ▾	Invoice Type ▾	Status ▾	Invoice Date	Created By ▾
----------------	--------	-------------	-----------------	----------------	----------	--------------	--------------

Draft Invoices

Name ▾	Form Type ▾	Total Payment ▾	Invoice Type ▾	Status ▾	Created By ▾	Created Date ▾	
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Create Invoice

Invoice Type

Company Information

Application Information

Preview

Send for Signature

Select Invoice Form Type

- On-Road Light-Duty, Motorcycle, Heavy-Duty, GHG Products (ON)
- Off-Road Vehicles/Engines and Equipment (OFF)
- Evaporative Components and Portable Fuel Containers (EVAP)
- Aftermarket Parts, Alternate Fuel Retrofit Systems, and Experimental Permits (AMP)
- Diesel Emission Control Strategies (DECS)
- At-Berth (AB)

Choose the applicable invoice group type



Save & Next



Create Invoice



* Company Name

* Address

* City

* State

* Zip

* Country

Manufacturer information found on the application/EO

* Contact Name

* Contact Telephone Number

* Contact E-Mail

* CARB Customer Number

Contact for application

CARB Customer Account Auto-fills



Previous Save & Next

Same column categories. Each payment row = 1 application.

Create Invoice

Progress: ✓ ✓ Application Information Preview Send for Signature

Save

Payment Row Number	Product Description or FileName	Unique Application Identifier	Model/Calendar Year	Category Type	Fee Type	Amount	Action
1	<input type="text"/>	<input type="text"/>	Select Model/Calendar Year	Select Category Type	Select Fee Type		+ -

Total Due US\$0.00

Save your drafts

Create Invoice

Progress: ✓ ✓ Application Information Preview Send for Signature

Save

Payment Row Number	Product Description or FileName	Unique Application Identifier	Model/Calendar Year	Category Type	Fee Type	Amount	Action
1	<input type="text"/>	<input type="text"/>	Select Model/Calendar Year	Select Category Type	Select Fee Type		+ -
2	<input type="text"/>	<input type="text"/>	Select Model/Calendar Year	Select Category Type	Select Fee Type		+ -

Total Due US\$0.00

Previous Next

Add and delete rows

Review Invoice Group Tutorials

to provide the correct information required

The screenshot shows a form with a progress bar at the top containing steps: Application Information (active), Preview, and Send for Signature. Below the progress bar is a 'Save' button. The form has several fields: Payment Row Number (1), Product Description or FileName, Unique Application Identifier, Model/Calendar Year, Category Type, Fee Type, and Action. A callout box with a red border and the text 'Product description and Unique ID must meet your program's requirements.' points to the Product Description and Unique Application Identifier fields. A 'Total Due' field shows 'US\$0.00'. At the bottom are 'Previous' and 'Next' buttons.

Product description and Unique ID must meet your program's requirements.

For On-Road, Calendar Year and Model Year dropdowns have separate Category Types

This section provides a detailed view of the form fields and their dropdown menus. The 'Model/Calendar Year' dropdown is set to 'Calendar Year 2022'. The 'Category Type' dropdown is set to 'Aerodynamic technologies'. A second 'Category Type' dropdown is shown with a list of options: 'Light-duty vehicle test group and medium-duty v...', 'SPCNS certified engine package', 'SPCNS certified engine package extension', 'SPMV certified engine package', 'SPMV manufacturer', 'Street-use motorcycle family and motorcycle eng...', 'HD CI engine family and MD CI engine family', 'HDO engine family and MDO engine family', 'Heavy-duty vehicle evaporative emissions family ...', 'On-Road Heavy-Duty Exempt Engines', and 'Heavy-duty greenhouse gas vehicle family'. A 'Model Year 2023' dropdown is also shown. Red circles and arrows highlight the 'Calendar Year 2022' and 'Aerodynamic technologies' selections.

Create Invoice

Application Information

Payment Row Number	Product Description or FileName	Unique Application Identifier	Model/Calendar Year	Category Type	Fee Type	Amount	Action
1	zippy car	XUBV12.345Zt	Model Year 2023	Light-duty vehicle test group and medium-duty ve...	Select Fee Type	US\$0.00	+

Save

Previous Next

Select the proper Fee Type. Contact your Cert. rep. to confirm before using reduced cost options.

Fee is based on Model/Calendar year, Category Type, and Fee Type selected.

Fee amount will auto-fill

Create Invoice

Application Information

Payment Row Number	Product Description or FileName	Unique Application Identifier	Model/Calendar Year	Category Type	Fee Type	Amount	Action
1	zippy car	XUBV12.345Zt	Model Year 2023	Light-duty vehicle test group and medium-duty ve...	Base	US\$23,255.00	+

Total Due US\$23,255.00

Save

Previous Next

Preview your invoice.

Cross-check manufacturer and contact information. Make sure Unique IDs conform with your programs requirements and the application qualifies for the Fee Type selected.

Preview Send for Signature

Please carefully review the application information and fee type selections before the next step. In the PDF, the Invoice Name and Invoice Date will be populated when the Invoice is sent for signature. After you review the Invoice PDF, click on the [Next] screen to enter the signer email address.

0693R00000.Jay5QAC 1 / 1 90%

STATE OF CALIFORNIA
CALIFORNIA ENVIRONMENTAL PROTECTION AGENCY
CALIFORNIA AIR RESOURCES BOARD
MOBILE SOURCE CERTIFICATION AND COMPLIANCE FEE PAYMENT FORM FOR ON-ROAD APPLICATIONS ONLY

CARB USE ONLY

Invoice Name {invoiceNumber}
Invoice Date {invoice_date_es_signer1.cak(now)}:format(date,"mm dd, yyyy")

COMPANY INFORMATION

Company Name Mead Motors
Address 12345 Motor Road
City Detroit
State MI
Zip 48321
Country USA
Contact Name Kathleen Mead
Contact Telephone Number 987.654.4321
Contact Email kathleen.mead@arb.ca.gov
FISCAL Account Number TEST0867

APPLICATION INFORMATION

Payment Row Number	Product Description or File Name	Model Year/Calendar Year	Unique Application Identifier: Test Group, Engine Family, Trailer Family, Vehicle Family, ZEP Family, if applicable (ID listed in payment row must match the unique identifier given to the certification application)	Category Type	Fee Type	Amount
1	zippy car	Model Year 2023	XUBV12.345ZEV12345	Light-duty vehicle test group and medium-duty vehicle test group	Base	\$ 23,255.00
2	aerodynamic part	Calendar Year 2023	aero1234	Aerodynamic technologies	Base	\$ 2,952.00
Total Due						\$ 26,207.00

1. {sig_es_signer1.signature}, attest that any information provided is true, accurate, and complete.

Previous Next

○ These area will be filled in, in the next steps

Send for Signature

Obtain the Proper Signatory

- The manufacturer's responsible party must sign the invoice. Make sure you fill in the correct e-mail address of the responsible party.

Create Invoice



A responsible party for the manufacturer must sign this invoice. By default, your email address is added as Signer Email. However, if you are not the responsible party, please enter the responsible party's email address here.

Signer Email

[Previous](#) [Send](#)



Create Invoice

All Invoices

Contact

Submitted Invoices Search

Invoice Name	Name	Form Type	Total Payment	Invoice Type	Status	Invoice Date	Created By
--------------	------	-----------	---------------	--------------	--------	--------------	------------

Draft Invoices Search

Name	Form Type	Total Payment	Invoice Type	Status	Created By	Created Date
INV-0000446	On-Road Light-Duty, Motorcycle, Heavy-Duty, GHG Products (ON)	US\$26,207.00	Original	Sent for Sign...	Kathleen Mead	13/07/2022

The California Air Resources Board is one of six boards, departments, and offices under the umbrella of the California Environmental Protection Agency.

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MS Fees Invoicing Software

**Attestation:
Manufacturer's Approval**

Signatory

- An email will be sent to the e-mail listed in your request. Remember to check your junk/spam files.

Signature requested on "MSF220131"



To: Mead, Kathleen@ARB

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

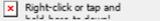
 

MSF220131

Review and sign

After you sign **MSF220131**, all parties will receive a final PDF copy by email.

Don't forward this email: If you don't want to sign, you can [delegate](#) to someone else.



By proceeding, you agree that this agreement may be signed using electronic or handwritten signatures.

To ensure that you continue receiving our emails, please add adobesign@adobesign.com to your address book or safe list.

© 2022 Adobe. All rights reserved.

Delegate this document

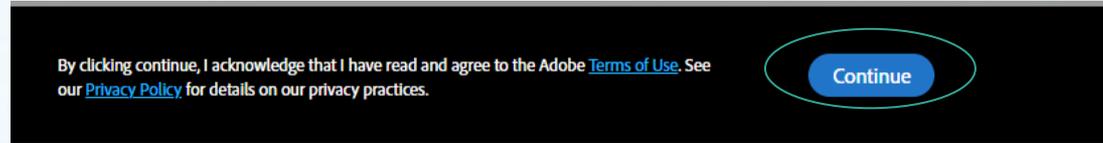
To send this document to another individual in your organization for signature, enter their email address and a message below.

Email:

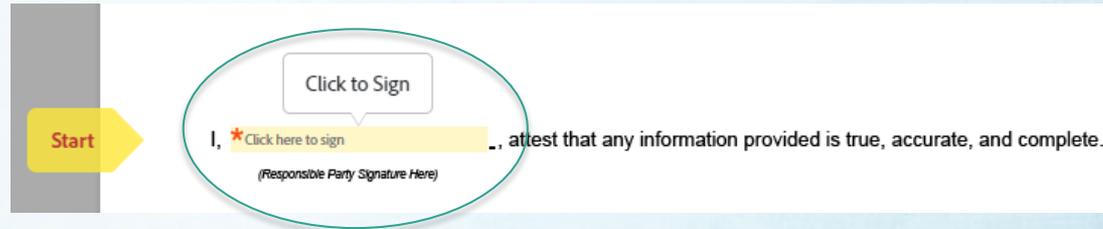
Message:

Adobe Sign Process

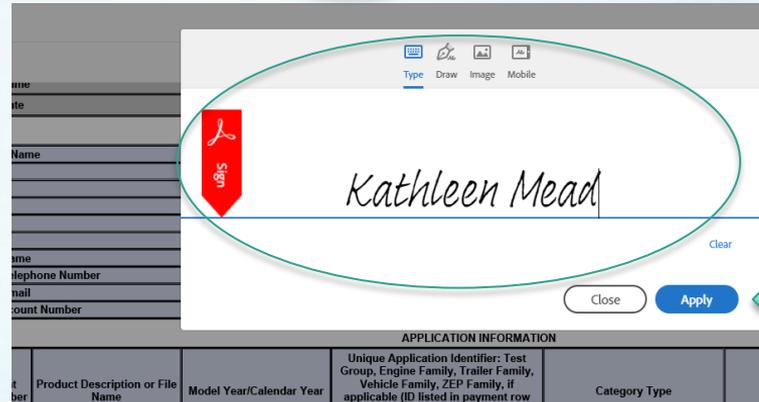
Step 1: Agree to terms



Step 2: Click "Click to Sign" to start



Step 3: Sign. 4 methods: type, draw, image and mobile. Signature must be unique.



Click "Apply"

Adobe Sign Process (con't)

Step 4: Review signature and document. You have the ability to modify the signature. Click "Click to Sign" after review.

APPLICATION INFORMATION

Payment Row Number	Product Description or File Name	Model Year/Calendar Year	Unique Application Identifier: Test Group, Engine Family, Trailer Family, Vehicle Family, ZEP Family, if applicable (ID listed in payment row must match the unique identifier given to the certification application)	Category Type	Fee Type	Amount
1	zippy car	Model Year 2023	XUBV12.345ZEV12345	Light-duty vehicle test group and medium-duty vehicle test group	Base	\$ 23,255.00
2	aerodynamic part	Calendar Year 2023	aero1234	Aerodynamic technologies	Base	\$ 2,952.00
Total Due						\$ 26,207.00

I, Katherine Moran, attest that any information provided is true, accurate, and complete.
(Responsible Party Signature Here)

By signing, I agree to this agreement, the [Consumer Disclosure](#) and to do business electronically with STATE OF CALIFORNIA AIR RESOURCE BOARD.

Click to Sign

Step 5: When completed the signatory has the ability to download the signed document.

 **You're all set**

You finished signing "MSF220131".

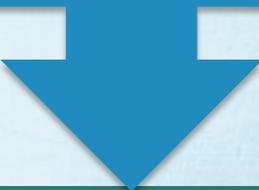
We will email the final agreement to all parties. You can also [download a copy](#) of what you just signed.

Final Invoice

- When the signatory clicks final “Click to Sign,” an e-mail sent to the invoice creator and CARB’s Revenue and Reimbursement Unit.
- Copy of Final Invoice is attached to e-mail
- CARB enters invoice information into the Customer Accounting System
(Starts 5-day waiting period for payment)

After Payment

An e-mail will be sent to the account e-mail contact when the payment is recorded in CARB Customer Account.



Provide a copy of the Final invoice and the confirmation e-mail when submitting your application.

Questions?

MS Fees Invoicing Software

Demo: Invoice Management

Home Screen Invoice Snapshot

- Draft Invoices = invoice started but incomplete (not signed and submitted)

The screenshot displays a user interface for managing invoices. At the top, there are three navigation cards: 'Create Invoice' (with a document icon), 'All Invoices' (with a document and dollar sign icon), and 'Contact' (with a person icon). Below these are two tables of invoices. The first table, 'Submitted Invoices', has a search bar and a table with columns: Invoice Name, Name, Form Type, Total Payment, Invoice Type, Status, Invoice Date, and Created By. The second table, 'Draft Invoices', also has a search bar and a table with columns: Name, Form Type, Total Payment, Invoice Type, Status, Created By, and Created Date. The 'Draft Invoices' table header and its first row are circled in red.

Invoice Name	Name	Form Type	Total Payment	Invoice Type	Status	Invoice Date	Created By
MSF220130	INV-000047	On-Road Light-Duty, Motorcycle, Heavy-Duty, GHG Products (ON)	\$2,952.00	Original	Submitted	07/13/2022	Byron Ng

Name	Form Type	Total Payment	Invoice Type	Status	Created By	Created Date
INV-000040	Off-Road Vehicles/Engines and Equipment (OFF)	\$275.00	Original	Sent for Sign...	Byron Ng	7/8/2022

Home Screen Invoice Snapshot

- Submitted Invoices = invoice signed, pending payment confirmation

The screenshot displays the 'Home Screen Invoice Snapshot' interface. At the top, there are three main navigation buttons: 'Create Invoice' (with a document icon), 'All Invoices' (with a document and dollar sign icon), and 'Contact' (with a person icon). Below these are two tables of invoices.

The first table is titled 'Submitted Invoices' (circled in red). It has a search bar on the right. The table columns are: Invoice Name, Name, Form Type, Total Payment, Invoice Type, Status, Invoice Date, and Created By. One row is visible with the following data:

Invoice Name	Name	Form Type	Total Payment	Invoice Type	Status	Invoice Date	Created By
MSF220130	INV-000447	On-Road Light-Duty, Motorcycle, Heavy-Duty, GHG Products (ON)	\$2,952.00	Original	Submitted	07/13/2022	Byron Ng

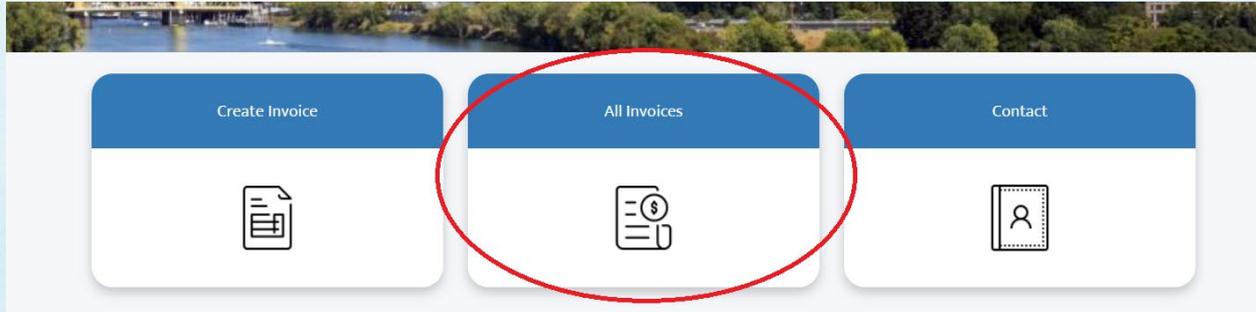
The second table is titled 'Draft Invoices'. It also has a search bar on the right. The table columns are: Name, Form Type, Total Payment, Invoice Type, Status, Created By, and Created Date. One row is visible with the following data:

Name	Form Type	Total Payment	Invoice Type	Status	Created By	Created Date
INV-000410	Off-Road Vehicles/Engines and Equipment (OFF)	\$275.00	Original	Sent for Sign...	Byron Ng	7/8/2022

A green arrow points from the 'Name' column of the 'Draft Invoices' table to the 'Name' column of the 'Submitted Invoices' table, indicating a link between the two.

Invoice name given when signed

All Invoices



All Invoices Search

Invoice Name	Name	Form Type	Total Payment	Invoice Type	Status	Invoice Date
MSF220130	INV-0000447	On-Road Light-Duty, Motorcycle, Heavy-Duty, GHG Products (ON)	\$2,952.00	Original	Submitted	07/13/2022
MSF220128-1	INV-0000443	Off-Road Vehicles/Engines and Equipment (OFF)	\$2,469.50	Revision	Refund Confirmed	07/12/2022
MSF220128	INV-0000441	Off-Road Vehicles/Engines and Equipment (OFF)	\$3,248.00	Original	Payment Confirmed	07/12/2022
MSF220124-1	INV-0000439	On-Road Light-Duty, Motorcycle, Heavy-Duty, GHG Products (ON)	\$31,978.50	Revision	Payment Confirmed	07/11/2022

Invoice Status

- Draft
 - ✓ Invoice started but incomplete
- Sent to Manufacturer (for invoice adjustments)
 - ✓ Updated Invoice Adjustment form sent to manufacturer for review
- Sent for Signature
 - ✓ Invoice completed and awaiting signature using Adobe Sign

Invoice Status (cont'd)

- Submitted
 - ✓ Invoice signed, pending payment confirmation
- Payment Confirmed
 - ✓ Payment received by CARB
- Refund Confirmed
 - ✓ Refund request submitted for reimbursement
- Modification Confirmed
 - ✓ No payment change but invoice UID or other modified
- Cancelled
 - ✓ Invoice has been cancelled

Questions?

What happens if I need to change my invoice after it is signed/paid?

- Adjusted Invoices
 - Contact your certification staff to generate an adjusted invoice
 - Three Types
 - ✓ No Cost Modification (UID, some Fee Types)
 - ✓ Refund (on-road, off-road and evaporative only)
 - ✓ Underpayment
 - CARB staff create the adjusted invoice and sends an e-mail to the original invoice creator for confirmation/signatory process.
 - Adjusted invoice name: Original-1, Original-2, etc.

Adjusted Invoice Process

- Click on link in e-mail or access from your home screen
- Walks through same steps as creating your invoice, but only in review mode: Invoice type, Company name, Application information, Preview, Send for signature.
- No changes can be made. Contact your certification representative if you disagree with any modifications.
- Send for signature to the manufacturer's authorized representative, e-mail confirmation sent once signed.

Example E-mail from CARB to initiate Adjustment Invoice

Sandbox: Please confirm the modifications to invoice MSF220135-1.



noreply@salesforce.com on behalf of Test Program Staff
To: Mead, Kathleen@ARB

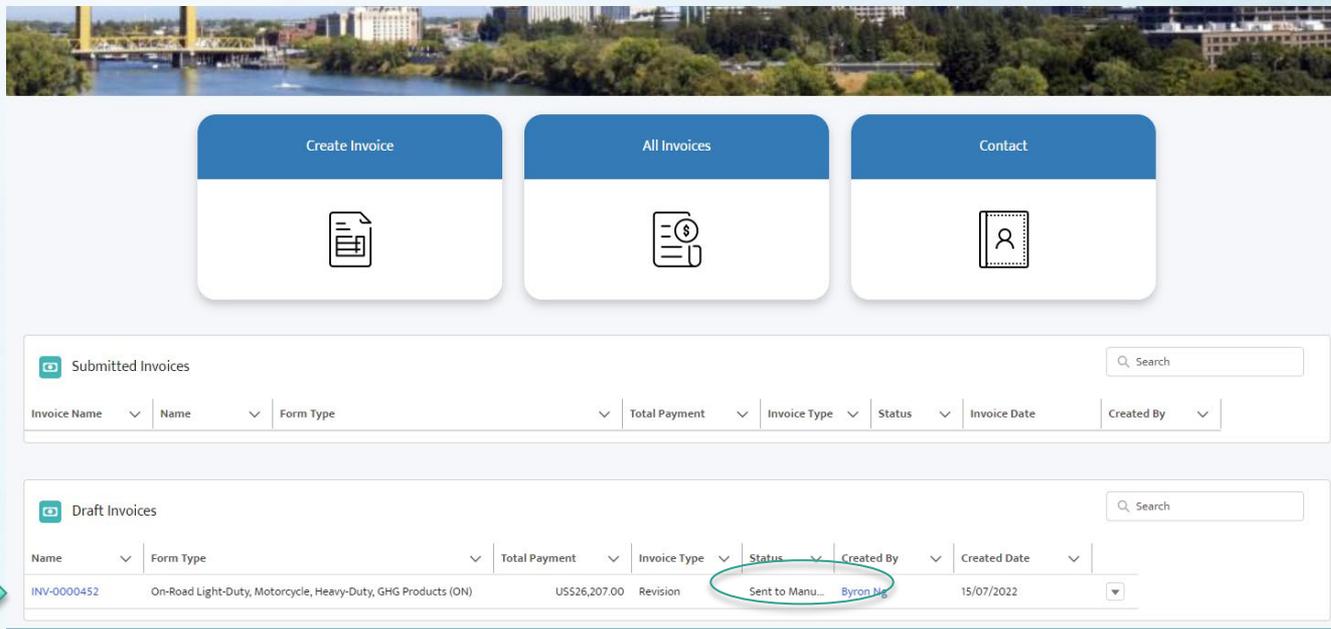
 If there are problems with how this message is displayed, click here to view it in a web browser.

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Please confirm the modifications to invoice MSF220135-1.

Please submit this draft invoice [here](#) through the system for approval by the manufacturer's responsible party. After signing, an updated invoice with a new invoice name will be sent to you for your records.

Adjustment Form found in Draft Invoices



The screenshot displays a web application interface. At the top, there is a banner image of a bridge over a river. Below the banner are three navigation cards: 'Create Invoice' with a document icon, 'All Invoices' with a document and dollar sign icon, and 'Contact' with a person icon. Below these cards are two sections: 'Submitted Invoices' and 'Draft Invoices'. The 'Draft Invoices' section contains a table with columns: Name, Form Type, Total Payment, Invoice Type, Status, Created By, and Created Date. A green arrow points to the 'Name' column header. In the table, the first row has the following data: Name: INV-0000452, Form Type: On-Road Light-Duty, Motorcycle, Heavy-Duty, GHG Products (ON), Total Payment: US\$26,207.00, Invoice Type: Revision, Status: Sent to Manu..., Created By: Byron Me, Created Date: 15/07/2022. The 'Status' cell is circled in green.

Name	Form Type	Total Payment	Invoice Type	Status	Created By	Created Date
INV-0000452	On-Road Light-Duty, Motorcycle, Heavy-Duty, GHG Products (ON)	US\$26,207.00	Revision	Sent to Manu...	Byron Me	15/07/2022

Click on the name to initiate invoice review and signature process

No Cost Adjustment Invoice

Update Invoice Number - INV-0000452

An updated invoice has been created where your data will be saved. The updated invoice record can be accessed from the Back to Invoice button.

Application Information

Payment Row Number	Previously Entered Unique Application Identifier	Previously Selected Model/Calendar Year	Previously Selected Category Type	Previously Selected Fee Type	Paid Amount	Corrected Unique Application Identifier	Corrected Model/Calendar Year	Corrected Category Type	Corrected Fee Type	Corrected Amount	Amount Due	
1	XUBV12.345ZE	Model Year 20	Light-duty ve	Base	23255	PUBV12.345ZE	Calendar ...	UID chan...	No Charge	23255	0.00	
2	aero1234	Calendar Year	Aerodynamic	Base	2952		Select M...	Select Ca...	Select Fe...		0.00	
Total Invoice MSF220131 Paid					US\$26,207.00	Total Corrected					US\$23,255.00	
											Total Due	US\$0.00

All rows of original invoice are shown (column 1-6) with correction (column 7-11), if made. Total amount due is the difference between original and new iteration.

Invoice Name	123456789101112									
Invoice Date	{{("invoice_date_es__signer1:calc(now)):format(date,"mmm dd, yyyy")}}									
COMPANY INFORMATION										
Company Name	Mead Motors									
Address	12345 Motor Road									
City	Detroit									
State	MI									
Zip	64321									
Country	USA									
Contact Name	Kathleen Mead									
Contact Telephone Number	987 654.4321									
Contact Email	kathleen.mead@arb.ca.gov									
FISCAL Account Number	TEST0987									
APPLICATION INFORMATION										
Row Number	Previous Unique Application Identifier	Previously Selected Category Type	Previously Selected Fee Type	Paid Amount	Corrected Unique Application Identifier	Corrected Category Type	Corrected Fee Type	Corrected Amount	Amount Due	
1	XUBV12.345ZE12345	Light-duty vehicle test group and medium-duty vehicle test group	Base	\$ 23,255.00	PUBV12.345ZE	UID change	No Charge	\$ 23,255.00	\$ 0.00	
2	aero1234	Aerodynamic technologies	Base	\$ 2,952.00	aero1234	Aerodynamic technologies	Base	\$ 2,952.00	\$ 0.00	
Total Invoice (MSF220131) Paid				\$ 26,207.00	Total Corrected				\$ 26,207.00	
									Total Due	\$ 0.00
Notes										
UID Change										

I, {{(Sig_es__signer1:signature)}}, attest that any information provided is true, accurate, and complete.
(Responsible Party Signature Here)

E-mail Confirmation

Sandbox: Adjusted MS Fee Invoice # MSF220131-1



noreply@salesforce.com on behalf of California Air

To Mead, Kathleen@ARB

Cc



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Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



MSF220131-1 - signed.pdf
78 KB

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Dear Kathleen Mead

Attached is your final adjusted invoice replacing MSF220131

If you have additional questions regarding the fee invoicing and payment process, please go to CARB's MS Fees webpage at



Refund Adjustment Invoice

Update Invoice Number - INV-0000453

An updated invoice has been created where your data will be saved. The updated invoice record can be accessed from the Back to Invoice button.

Application Information						Preview	Sent for Signature				
Payment Row Number	Previously Entered Unique Application Identifier	Previously Selected Model/Calendar Year	Previously Selected Category Type	Previously Selected Fee Type	Paid Amount	Corrected Unique Application Identifier	Corrected Model/Calendar Year	Corrected Category Type	Corrected Fee Type	Corrected Amount	Amount Due
1	PUBV12.345ZE	Calendar Year	UID change	No Charge	23255		Select M...	Select Ca...	Select Fe...		0.00
2	aero1234	Calendar Year	Aerodynamic!	Base	2952	aero1234	Calendar ...	Refund : ...	Full Refu...	0	-2952.00
Total Invoice MSF220131-1 Paid					US\$26,207.00	Total Corrected					US\$50.00
						Total Due					US\$50.00

STATE OF CALIFORNIA
CALIFORNIA ENVIRONMENTAL PROTECTION AGENCY
CALIFORNIA AIR RESOURCES BOARD
MOBILE SOURCE CERTIFICATION AND COMPLIANCE FEE PAYMENT FORM FOR ON-ROAD APPLICATIONS ONLY

CARB USE ONLY

Invoice Name	{{invoiceNumber}}
Invoice Date	{{"invoice_date_es_";signer1.calc(now)}}.format(date,"mmm dd, yyyy")}}

COMPANY INFORMATION

Company Name	Mead Motors
Address	12345 Motor Road
City	Detroit
State	MI
Zip	48321
Country	USA
Contact Name	Kathleen Mead
Contact Telephone Number	987 654 4321
Contact Email	kathleen.mead@arb.ca.gov
FISCAL Account Number	TEST0987

APPLICATION INFORMATION

Row Number	Previous Unique Application Identifier	Previously Selected Category Type	Previously Selected Fee Type	Paid Amount	Corrected Unique Application Identifier	Corrected Category Type	Corrected Fee Type	Corrected Amount	Amount Due
1	PUBV12.345ZEV	UID change	No Charge	\$ 23,255.00	PUBV12.345ZEV	UID change	No Charge	\$ 23,255.00	\$ 0.00
2	aero1234	Aerodynamic technologies	Base	\$ 2,952.00	aero1234	Refund : No application submitted	Full Refund (100%)	\$ 0.00	-\$ 2,952.00
Total invoice (MSF220131-1) Paid				\$ 26,207.00	Total Corrected				\$ 23,255.00
					Total Due				-\$ 2,952.00

Notes
Refund: No Application Submitted

I, {{Sig_es ;signer1.signature}}, attest that any information provided is true, accurate, and complete.

(Responsible Party Signature Here)



E-mail Confirmation

Sandbox: Adjusted MS Fee Invoice MSF220131-2

 noreply@salesforce.com on behalf of California Air 
To: Mead, Kathleen@ARB
Cc: 

 If there are problems with how this message is displayed, click here to view it in a web browser.
Click [here](#) to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

 MSF220131-2 - signed.pdf
77 KB

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Dear Kathleen Mead,

Attached is your Final invoice addressing your request for a refund for invoice  MSF220131-1. Your refund is in process will take approximately 5 to 7 weeks for processing. The payment will be issued to the manufacturer listed in your FI\$Cal account.

If you have additional questions regarding the fee invoicing and payment process, please contact your assigned CARB certification staff.



Underpayment Adjustment Invoice

Update Invoice Name - MSF220133-1

An updated invoice has been created where your data will be saved. The updated invoice record can be accessed from the Back to Invoice button.

Application Information

Payment Row Number	Previously Entered Unique Application Identifier	Previously Selected Model/Calendar Year	Previously Selected Category Type	Previously Selected Fee Type	Paid Amount	Corrected Unique Application Identifier	Corrected Model/Calendar Year	Corrected Category Type	Corrected Fee Type	Corrected Amount	Amount Due
1	PUBV12.3 funs	Model Year 2C	OHRV engine 1	Low California	1121	PUBV12.3 funs	Model Ye...	OHRV en...	Base	1494	373.00
Total Invoice MSF220133 Paid					US\$1,121.00	Total Corrected					US\$1,494.00
						Total Due					US\$373.00

Previous Save & Next

Address 1234 fun street
 City Detroit
 State MI
 Zip 84321
 Country USA
 Contact Name Kathleen Mead
 Contact Telephone Number 321.543.8765
 Contact Email kathleen.mead@arb.ca.gov
 FISCal Account Number TEST0987

APPLICATION INFORMATION											
Row Number	Previous Unique Application Identifier	Previously Selected Category Type	Previously Selected Fee Type	Paid Amount	Corrected Unique Application Identifier	Corrected Category Type	Corrected Fee Type	Corrected Amount	Amount Due		
1	PUBV12.3 funstuff	OHRV engine family	Low California Production Manufacturer	\$ 1,121.00	PUBV12.3 funstuff	OHRV engine family	Base	\$ 1,494.00	\$ 373.00		
Total Invoice (MSF220133) Paid				\$ 1,121.00	Total Corrected				\$ 1,494.00	Total Due \$ 373.00	

Notes
 Does not qualify for Partial Carry-Over. Change fee type to Base Fee

I, [[Signer1.signature]], attest that any information provided is true, accurate, and complete.
(Responsible Party Signature Here)

E-mail Confirmation

Sandbox: MS Fee Invoice "MSF220133-1 – Kathleen Mead submitting invoice – 7/15/2022

 noreply@salesforce.com on behalf of California Air Resources Board
To: Mead, Kathleen@ARB
Cc: [redacted]

 Reply  Reply All  Forward 
Fri 7/15/2022 11:29 AM

 If there are problems with how this message is displayed, click here to view it in a web browser.
[Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

 MSF220133-1 - signed.pdf
77 KB

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Dear Kathleen Mead

Attached is your Final invoice for your MS Fee payment. Go to the payment portal at <https://ww2.arb.ca.gov/payments> for the types of payments available. Please include Invoice Name MSF220133-1 on all payment communications.

Please wait 5 business days from the receipt of this e-mail to make your payment. If your payment is more than \$100,000, when you make a payment, please notify CARB by e-mail at ARB Accounts Receivable AccountsReceivable@arb.ca.gov, copying Fees@arb.ca.gov, advising us that your payment has been made on the day of payment. Please include in the body of your e-mail your Fi\$Cal account number, invoice name and amount of payment. This e-mail is also directed to CARB's fiscal unit. They will enter the following information into the Fi\$Cal system for processing your payment:

Fi\$Cal Account number: TEST0987
Invoice Name: MSF220133-1
Invoice Amount : \$373.00
Invoice Date: 7/15/2022

For information on payment options or questions, please use the contact information listed on the payment portal webpage.

For questions regarding processing of payments, please contact by email AccountsReceivable@arb.ca.gov.

If you have additional questions regarding the fee invoicing and payment process, please go to CARB's MS Fees webpage at <https://ww2.arb.ca.gov/mobile-source-certification-and-compliance-fee-regulation-meetings-workshops>



Wait 5 days Prior to Paying Fee

Questions?

Lessons Learned since April 2022

What you need to know before you
create/submit an invoice

Contact Your Certification Representative

- CARB Customer Account (see Slide #8)
- Select the correct “Group” Invoice type
- Unique ID requirements – make sure it is correct!
 - ✓ For AMP, know the number of applications you have submitted to CARB per calendar year
- “Reduced Cost” Fee Type – confirm that you qualify before paying your fee!

Who is my Certification Representative?

<https://ww2.arb.ca.gov/mobile-source-certification-and-compliance-fee-regulation-meetings>

- On and Off Road: Contact your assigned certification staff
- Portable Fuel Containers and Evaporative Components (SORE): [Michele Dunlop](mailto:Michele.Dunlop@arb.ca.gov) Michele.Dunlop@arb.ca.gov
- Evaporative Components (OHRV and SIMW): [Scott Monday](mailto:Scott.Monday@arb.ca.gov) Scott.Monday@arb.ca.gov
- Aftermarket Parts: [Trina Pendon](mailto:Trina.Pendon@arb.ca.gov) Trina.Pendon@arb.ca.gov
- Diesel Emission Control Strategies (DECS): [Milad Pirhadi](mailto:Milad.Pirhadi@arb.ca.gov)
- At-Berth: [Milad Pirhadi](mailto:Milad.Pirhadi@arb.ca.gov) Milad.Pirhadi@arb.ca.gov

Before You Pay

- Do not pay before you have the Final Invoice
- Do not make payment until 5 business days after receipt of Final Invoice to allow for processing
- Include your invoice number with all payment communications
- Include all additional wire transfer or other bank fees in your payment total
- Do not pay your fees twice!

Required for Payment

- Final Invoice Name
- Pay Total Payment on Final Invoice plus processing fees
- Payment method: Credit card, Check, Wire Transfer
- ww2.arb.ca.gov/payments

Planning Your Application Submission

Up to 8-12 business days to process invoice and payment

MS Fees Software System
Manufacturer creates draft invoice, confirms all information on invoice is accurate, obtains manufacturer signature.

MS Fees Invoicing Software sends Final Invoice to manufacturer and Revenue/Reimbursement inputs information into CARB accounting system.

Wait up to 5 business days to make payment

Manufacturer submits payment to CARB

CARB Accounting processes payment and updates MS Fee Invoicing System that payment has been made.

MS Fee Invoicing System send an e mail to manufacturer

Up to 3-7 business days after payment

Manufacturer submits application, copy of payment notification e mail and Final Invoice to CARB with application.

CARB certification staff checks payment and begins review of application

MS Fees Invoicing System

- Use the MS Fees Invoicing Software System starting Monday, August 8th

<https://carb2.my.site.com/CARBPortal/s/login/>

- Any invoices submitted thru MSCertFee@arb.ca.gov will not be accepted after Friday August 5th

- Training information available

<https://ww2.arb.ca.gov/mobile-source-certification-and-compliance-fee-regulation-meetings-workshops>

- Contact your certification representative if you have questions

Who is my Certification Representative?

<https://ww2.arb.ca.gov/mobile-source-certification-and-compliance-fee-regulation-meetings>

- On and Off Road: Contact your assigned certification staff
- Portable Fuel Containers and Evaporative Components (SORE): [Michele Dunlop](mailto:Michele.Dunlop@arb.ca.gov) Michele.Dunlop@arb.ca.gov
- Evaporative Components (OHRV and SIMW): [Scott Monday](mailto:Scott.Monday@arb.ca.gov) Scott.Monday@arb.ca.gov
- Aftermarket Parts: [Trina Pendon](mailto:Trina.Pendon@arb.ca.gov) Trina.Pendon@arb.ca.gov
- Diesel Emission Control Strategies (DECS): [Milad Pirhadi](mailto:Milad.Pirhadi@arb.ca.gov)
- At-Berth: [Milad Pirhadi](mailto:Milad.Pirhadi@arb.ca.gov) Milad.Pirhadi@arb.ca.gov

Questions?