



**Mobile Source and Certification System (Online Portal)**

User Guide

Version 4



### Document History

Revision	Effective date	Changes
Draft	7/1/2022	<ul style="list-style-type: none"><li>Created Draft</li></ul>
Draft	7/19/2022	Staff edits
Draft	7/22/2022	Manufacturer input
Draft	8/10/2022	Manufacturer input

[OBJ]



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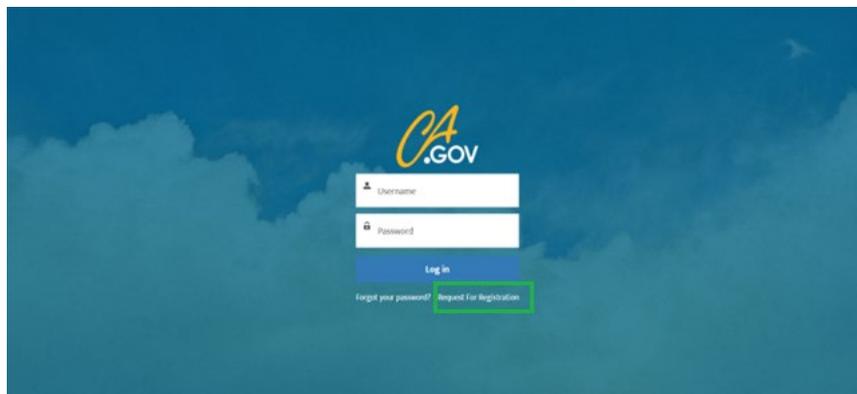
## 1.0 Getting Started – Mobile Source (MS) Fees Invoicing System Online Portal

Only one MS Fee System Account is available per Manufacturer, per CARB Customer account. If a manufacturer has multiple CARB Customer accounts, each CARB Customer account must have a MS Fees Invoicing System account to create an invoice for that account. Each account is required to have an Account Administrator. The Account Administrator must be assigned as the CARB Customer account contact. The account log-in is based on the Account Administrator’s e-mail address and cannot be used in multiple MS Fees Invoicing System main accounts. Member accounts can be created by the manufacturer’s Account Administrator to address multiple users (discussed in Section 2.2)

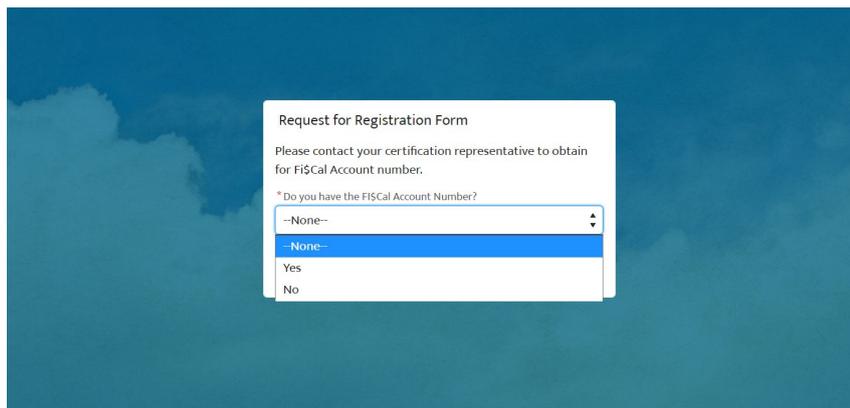
To obtain a MS Fees System Account, the manufacturer’s Account Administrator can access MS Fees Invoicing System portal by clicking below link.

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

### 1.1 Log into the portal by clicking the link above



If you already have a username & password, enter your credentials to log in. If you don’t have a username & password, click **“Request for Registration”**.

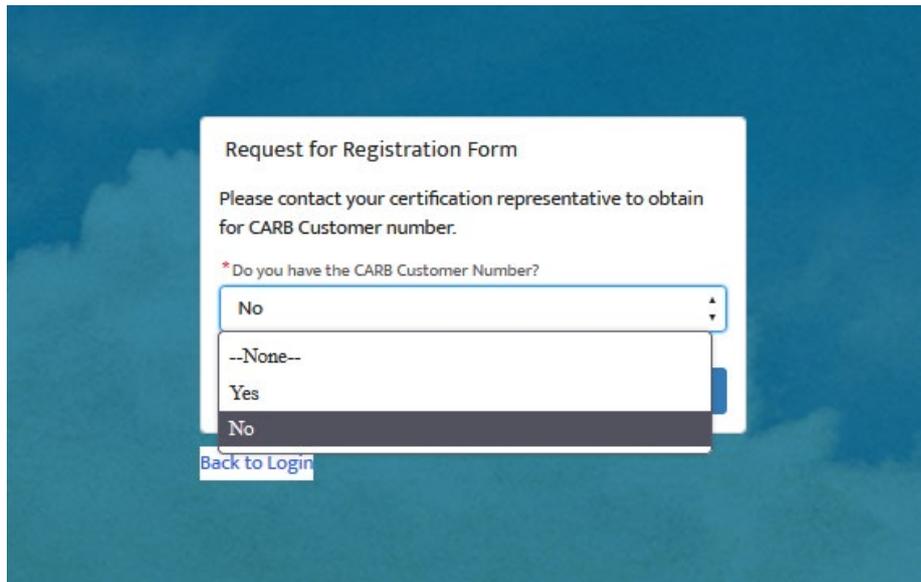


The system will ask if you have a CARB Customer account.

### 1.2 Requesting for CARB Customer Account Number

Before requesting a CARB Customer account through the system, contact your point of contact within your company, then your CARB certification representative, to obtain your account information. If CARB staff directs you, then you can use the system CARB

Customer account request and select “No” to obtain new CARB Customer account number.



The screenshot shows a web form titled "Request for Registration Form". Below the title, there is a instruction: "Please contact your certification representative to obtain for CARB Customer number." A required question follows: "\* Do you have the CARB Customer Number?". A dropdown menu is open, showing the following options: "No", "--None--", "Yes", and "No". The "No" option at the bottom of the list is highlighted in a dark grey color. Below the dropdown, there is a blue link that says "Back to Login".

After selecting “No” and clicking **[Next]**, you will be redirected to the page below to fill out **required details** in the form. The information requested must be for the parent manufacturer who is responsible and liable for the payment. The contact person is required to be a manufacturer’s representative that is responsible for payments. No consultants can acquire or obtain a CARB Customer account for a manufacturer.

### Request for Registration Form

\* Manufacturer Complete Name (The name of the company paying the fee)

\* Street Address

\* City

\* State

\* Zip Code

\* Country

\* Contact Name (For payment issues)

\* Contact Title

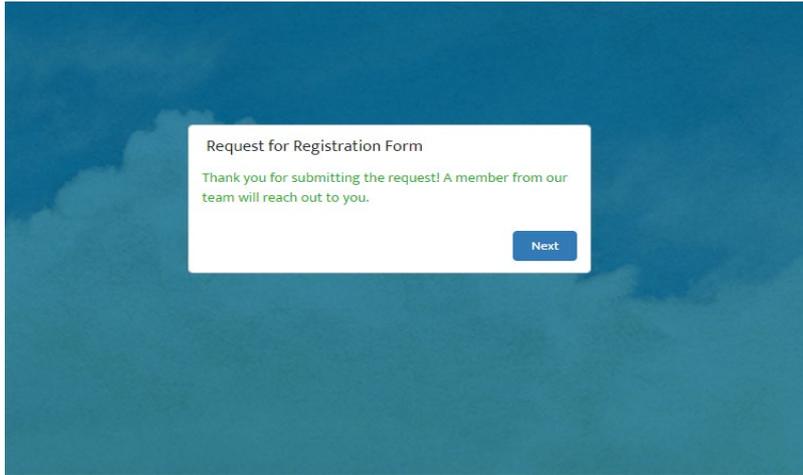
\* Contact Phone Number

\* Contact Email

\* Certification Group Types

- On-Road (ON)
- Off-Road (OFF)
- Evaporative Components (EVAP)
- Aftermarket Parts (AMP)
- Diesel Emission Control Strategies (DECS)
- At-Berth (AB)

After entering the details, click **[Next]** to receive the following confirmation message.



In the backend, the System will create a record in Registration Request object and automatically notify CARB's Revenue/Reimbursement unit via email ([fees@arb.ca.gov](mailto:fees@arb.ca.gov)) of your CARB Customer Account Number request. The following email is sent to CARB's Revenue/Reimbursement unit:

This is a request for a new CARB Customer Number for the following manufacturer:

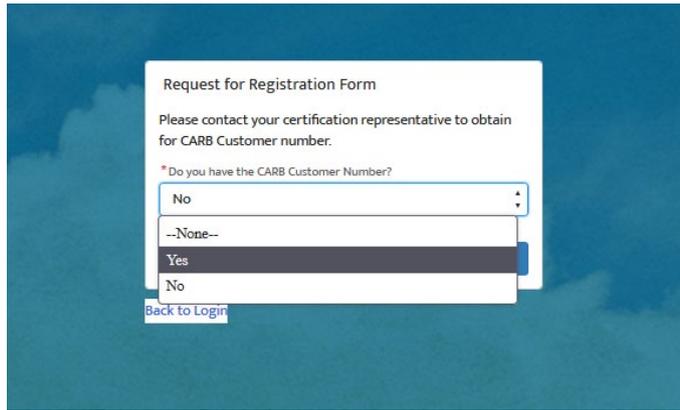
- a. **Manufacturer Complete Name (The name of the company paying the fee):** Manufacturers Plus, Inc.
- b. **Contact Name (For payment issues):** Jane Smith
- c. **Street Address:** 1234 Main Street
- d. **City:** Beverly Hills
- e. **State:** California
- f. **Zip Code:** 90210
- g. **Country:** USA
- h. **Contact Title:** Controller
- i. **Contact Phone Number:** 555-555-5555
- j. **Contact E-mail Address:** Jane.Smith@manufacturer.com
- k. **Certification Group Type:** Aftermarket Parts, Alternate Fuel Retrofit Systems, and Experimental Permits (AMP)

Your CARB certification representative will provide you with your CARB Customer account once created.

### 1.3 Request for Registration – Creating the Manufacturer Main Account

Navigate to the portal log in page once you receive the CARB Customer Account Number and click **[Request for Registration]**.

Select **[Yes]** and click **[Next]**



After selecting “Yes” and clicking **[Next]**, you will be redirected to the page below to fill out **required details** in the form. Filling out this form initiates your main account. The account information must reflect the CARB Customer account and your Account Administrator information. Make sure you have the correct CARB Customer Account Number. This number is reflected on all invoices created by the Account Administrator and the account members using this account.

**Request for Registration Form**

\* Company Name  
Manufacturers Plus, Inc.

\* Street Address  
1234 Main Street

\* City  
Beverly Hills

\* State  
California

\* Zip  
90210

\* Country  
USA

\* Contact First Name  
Jane

\* Contact Last Name  
Smith

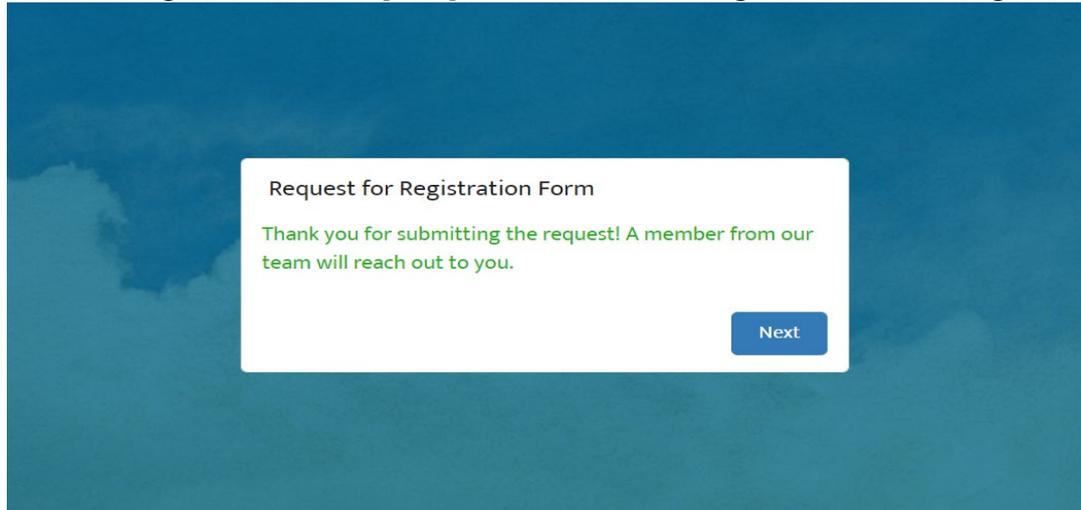
\* Contact Telephone Number  
555-555-5555

\* Contact Email  
Jane.Smith@manufacturer.com

\* CARB Customer Number  
TEST0001

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After entering the details, click **[Next]** to receive the following confirmation message:



In the backend, the System will create a record in Registration Request in the MS Fees Invoicing System Queue for Approval. From this queue, the Program Administrator will review and approve the request.

In case of Approval, you will receive a notification by email regarding the approval. You will also receive an email to set up the credentials for logging into the Portal.

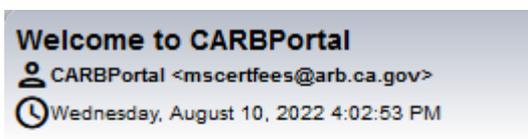
The following email will inform you that the request for registration was approved.



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.

Approval Comments:  
Approved

In addition, the following email will be sent to provide you with your username and reset your password.



Hi Jane,

Welcome to CARBPortal! To get started, go to



Username: Jane.Smith@manufacturer.com

Thanks,  
State of Ca Air Resources Board

In case your account is not approved (or rejected), you will receive an email with the rejection details. The details can include duplicate CARB Customer accounts, an unassociated Account Administrator, etc.

The following email will be sent to you if the request for registration was rejected:



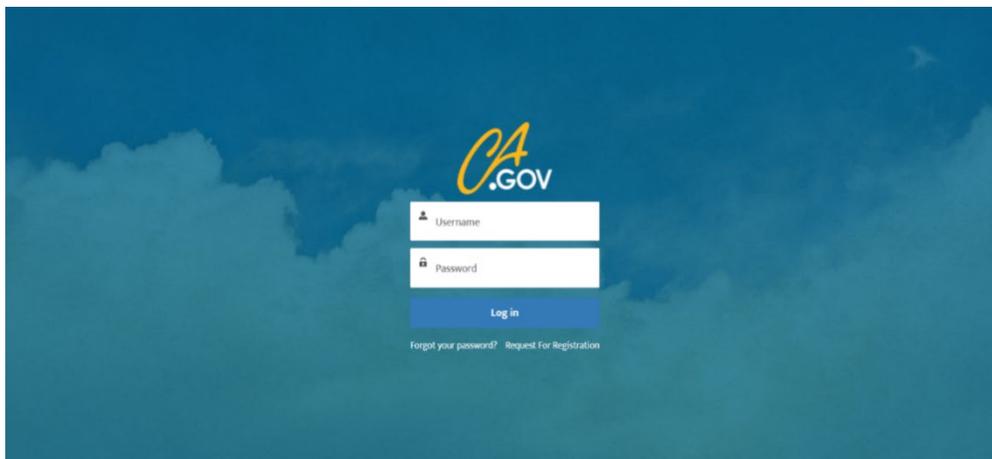
Your request for registration has been rejected by CARB team.

CARB team comments:

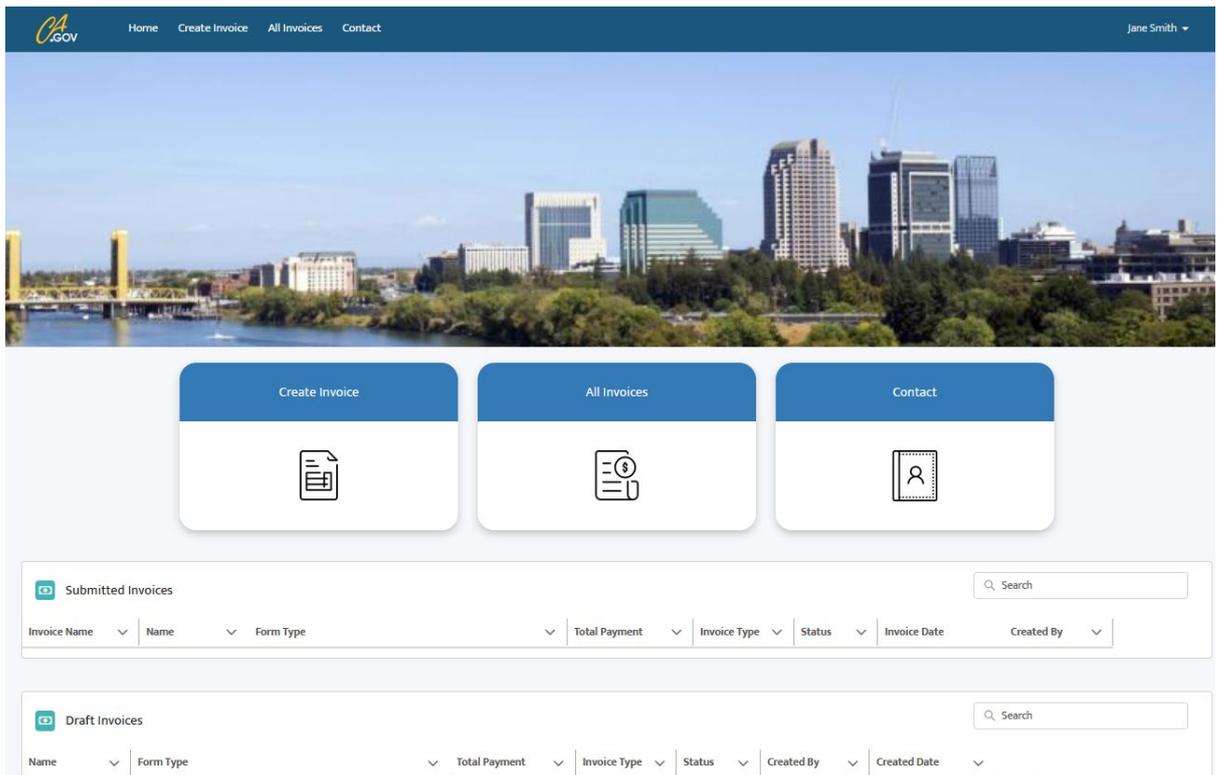
Please submit correct company name

## 2.0 My Portal Home Page

Once you receive the MS Fees Invoicing System account, you can log in to the portal.



Once the log in is successful, you will be redirected to the portal home page as shown below:

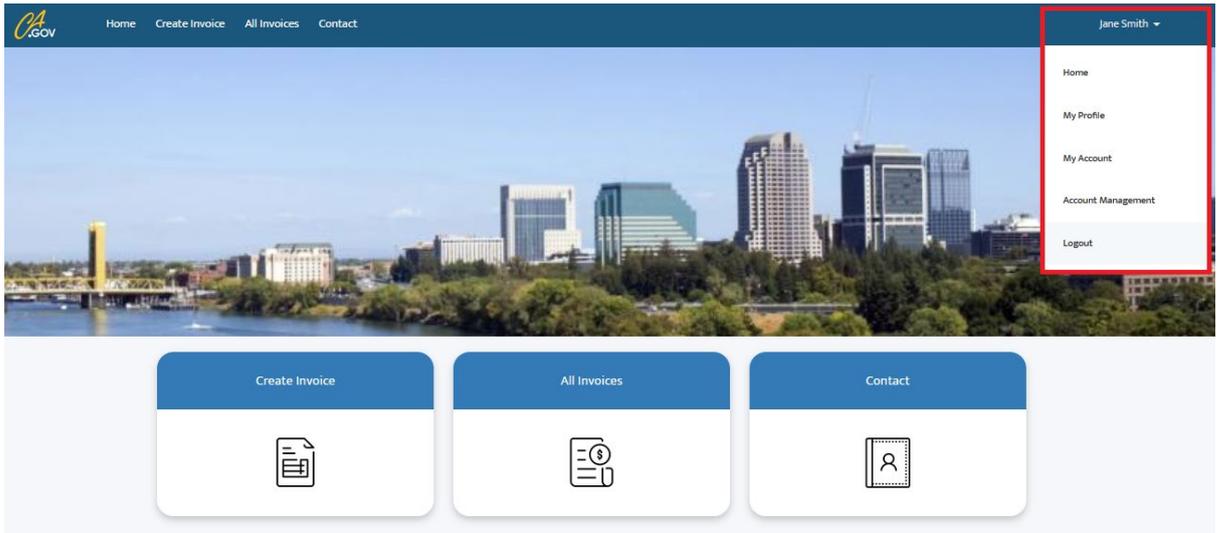


Once you are in the portal home page, you can access the following menus:

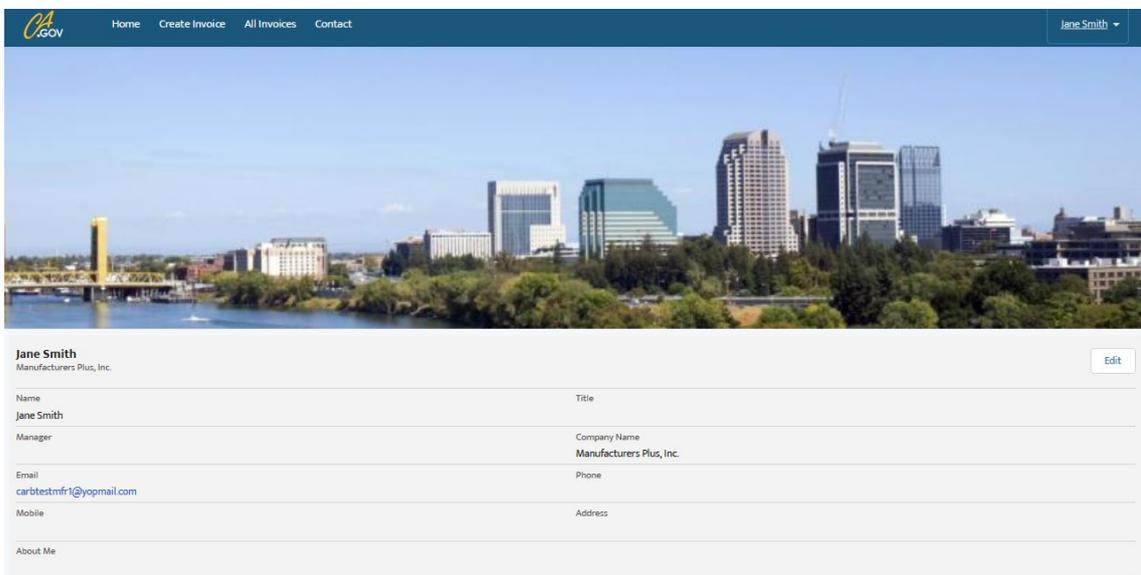
1. **Home** – You can view Draft & Submitted invoices and navigate to Create Invoice, All Invoices & Contact
2. **Create Invoice** – You can create invoice
3. **All Invoices** – You can access all kind of invoices
4. **Contact** – You can access their contact record
5. **My Profile** – drop down menu that provides access to “My Profile”, “My Account” and “Account Management” (available only for manufacturer’s Account Administrators)

## 2.1 My Profile

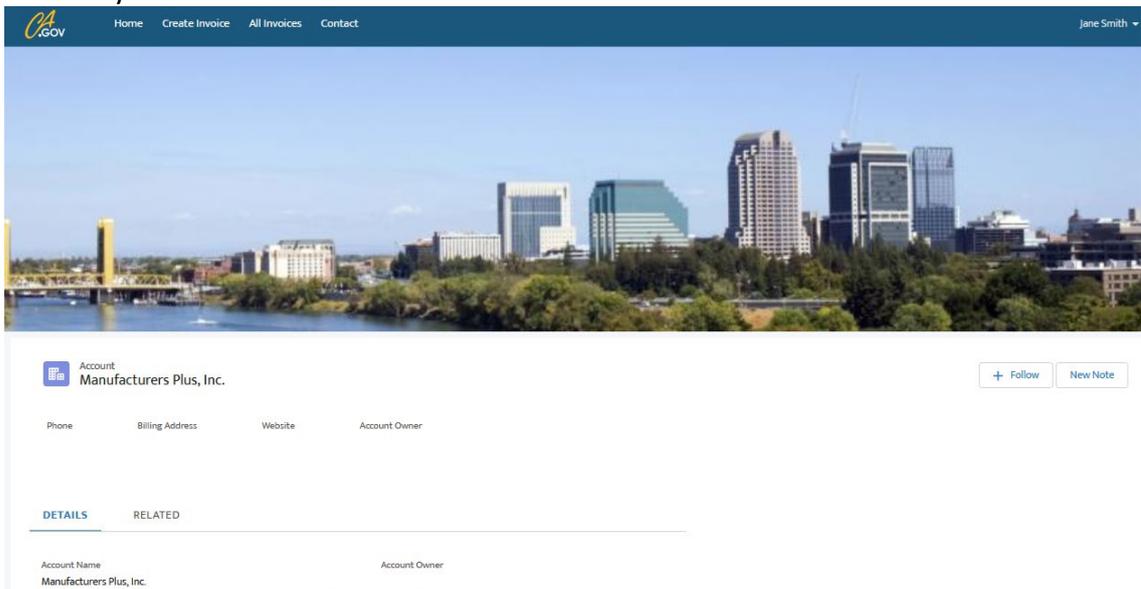
Once you are in the portal home page, you can access your profile page by clicking the link on the name displayed on the right-side top corner.



Click "My Profile" to view your personal details



Click "My Account" to view account details



Click the **[Edit]** button to update your personal details (i.e., Phone Number & Address ...etc.). The **[Edit]** button is not available for the Account information. Please make sure your details are up to date.

Edit User

**About**

\*Name

First Name

Middle Name

\*Last Name

Suffix

Manager

Title

Company Name

**Contact**

\*Email

Mobile

Phone

Address

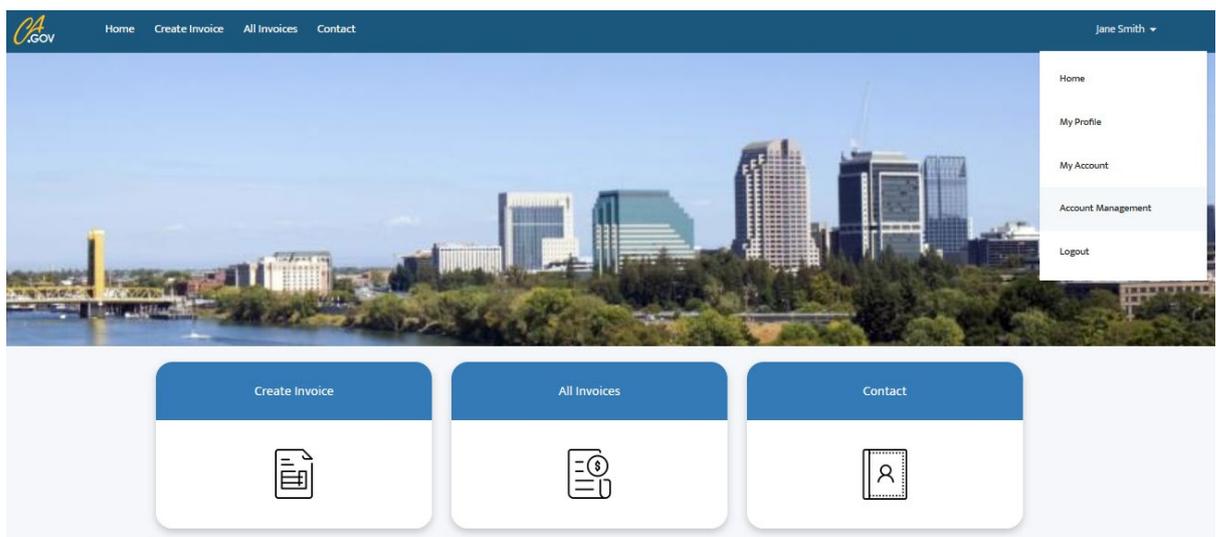
Street

City

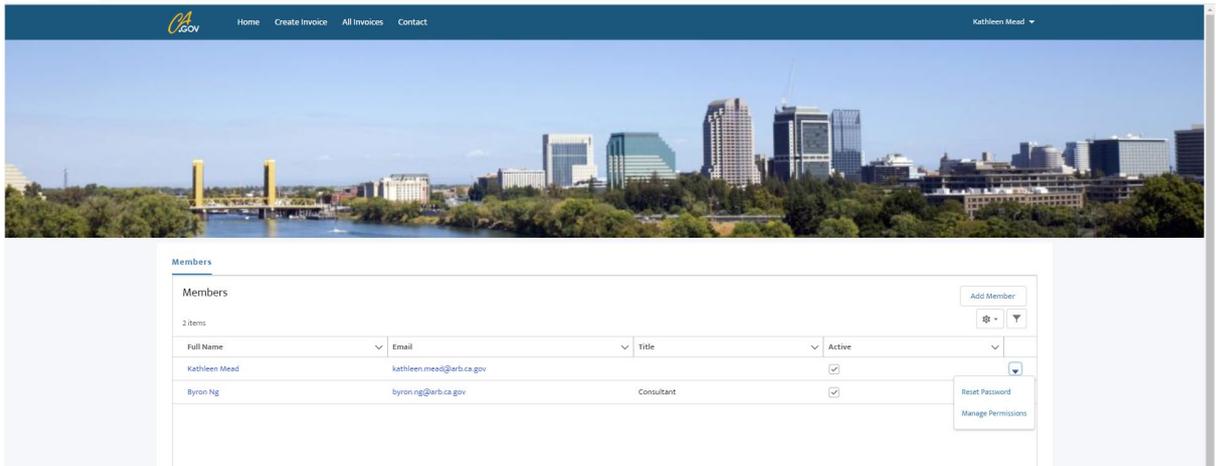
State/Province

## 2.2 Viewing or managing Member Accounts (Available only to your Account Administrator)

Member accounts can only be created, modified or deactivated by your Account Administrator. To view or manage your Member Accounts, click on **[Account Management]**.



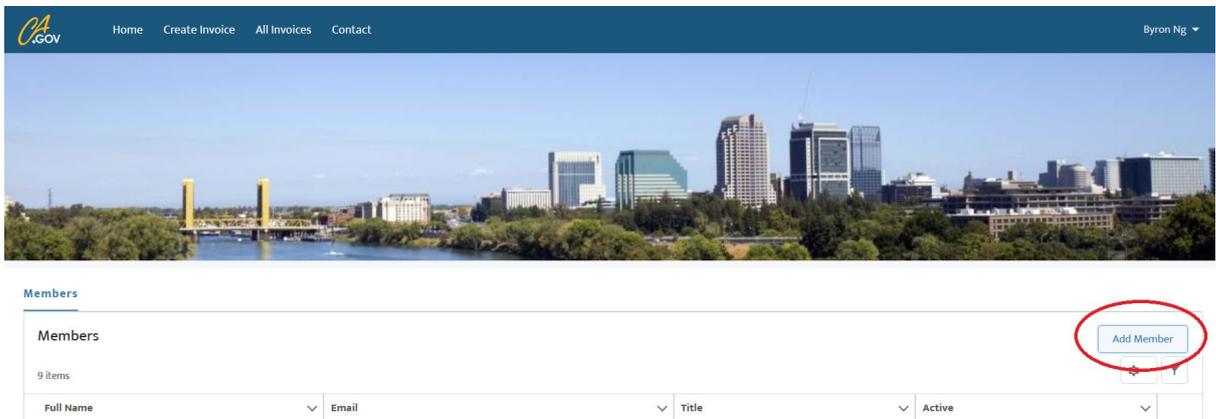
You will be redirected to the following page:



Each Member Account will be listed. Once an account is created it cannot be deleted, only deactivated. To deactivate, click on the “Active” column to remove the check. To force a reset, click on the dropdown arrow on the right side and click on “reset password.” Members can reset their own passwords by clicking on the “Forgot Your Password?” on the portal page.

### 2.3 Creating Member Accounts (Available only to the Account Administrator)

To create a Member Account, Click on “Account Manager, then Click on “Add Member”



After being redirected to the page below, fill out the **required details** in the form and click **[Save]**.

New User

**Basic Information**

\* Name

First Name

Middle Name

\* Last Name

Suffix

\* Email

\* Username

\* Alias

Title

Phone

\* Profile

Accounts are based on a unique Username, not the e-mail as with the main manufacturer or account administrator’s account. CARB recommends that the username uses a descriptor to describe the relationship with the company (CNS=Consultant; MFR=Manufacturer), underscore, CARB manufacturer code for company, underscore, and E-mail address of member. The e-mail needs to meet e-mail format, but not necessarily functional.

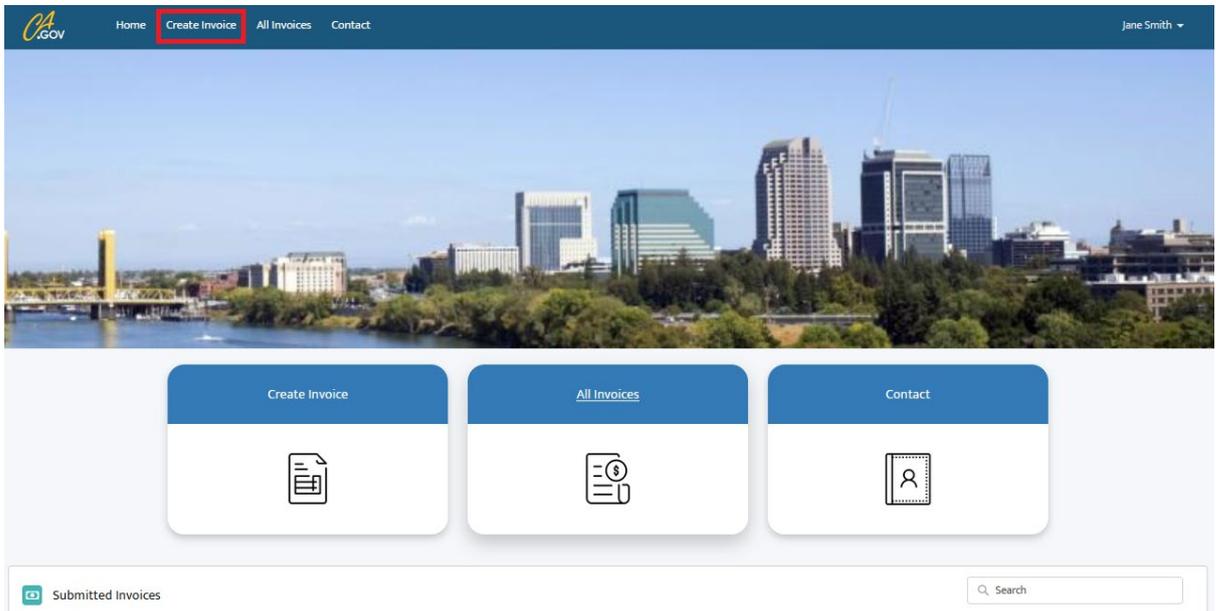
Example: CNS\_MEA\_kmead@arb.ca.gov

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.

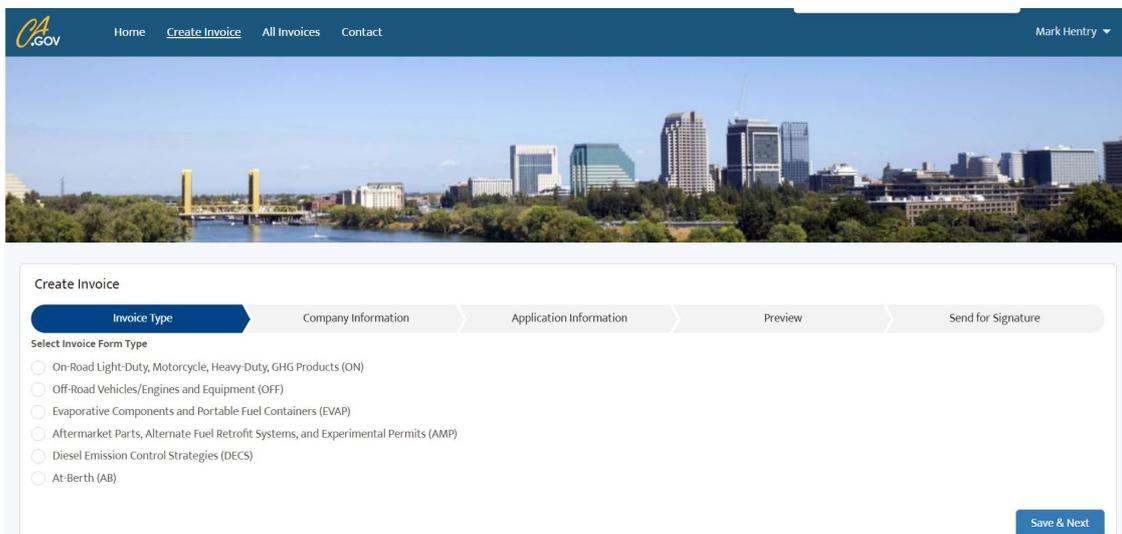


### 3.0 Creating Invoices

As a Manufacturer, you can create an invoice by clicking **[Create Invoice]** from Menu.



Click **[Create Invoice]** to be redirected to the following page



Select the invoice form type from the available options and then click **[Save & Next]**



**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)

[Save & Next](#)

Enter Manufacturer Information and Contact Person details and then click **[Save & Next]**. Remember to use the manufacturer name that is on the application or EO and the contact name of the individual working with CARB on the application approval process.

**Create Invoice**

✓    Company Information    Application Information    Preview    Send for Signature

<p>* Company Name</p> <input type="text" value="Manufacturers Plus, Inc."/>	<p>* Contact Name</p> <input type="text" value="Jane Smith"/>
<p>* Address</p> <input type="text" value="1234 Main Street"/>	<p>* Contact Telephone Number</p> <input type="text" value="555-555-5555"/>
<p>* City</p> <input type="text" value="Beverly Hills"/>	<p>* Contact E-Mail</p> <input type="text" value="carbtestmf1@yopmail.com"/>
<p>* State</p> <input type="text" value="CA"/>	<p>CARB Customer Number</p> <input type="text" value="TEST0001"/>
<p>* Zip</p> <input type="text" value="90210"/>	
<p>* Country</p> <input type="text" value="USA"/>	

[Previous](#)    [Save & Next](#)

After clicking **[Save & Next]**, you are redirected to the invoice portion to complete each application payment information. Enter an individual application information by row.

You can add more application rows by clicking  icon. If you want to remove unwanted rows, then click  icon. Click the **[Save]** button to save the application information. Once saved, the draft can be found on your portal home page under “Draft Invoices.”

**Success**  
Invoice Applications saved successfully

Create Invoice

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	Test File 1	1001	Calendar Year 2023	Aerodynamic technologies	Base	\$2,952.00	+ -
2	Test File 2	1002	Calendar Year 2022	Fuel-fired heater	Base	\$293.00	+ -
<b>Total Due</b>						<b>\$3,245.00</b>	

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Once your invoice draft is ready to move to the signatory phase, you can preview the entered Manufacturer and Application information in PDF format before it is sent for e-sign. Make sure all the information is accurate before sending to e-sign. To get signatory, click **[Next]** button.

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.

1 of 1    Automatic Zoom

**CARB USE ONLY**

STATE OF CALIFORNIA  
CALIFORNIA ENVIRONMENTAL PROTECTION AGENCY  
CALIFORNIA AIR RESOURCES BOARD

**MOBILE SOURCE CERTIFICATION AND COMPLIANCE FEE PAYMENT FORM FOR ON-ROAD APPLICATIONS ONLY**

Invoice Name	[[InvoiceNumber]]
Invoice Date	[[Invoice_date_at_signer1 calc:now]] format(date,"mmmm dd, yyyy")

**COMPANY INFORMATION**

Company Name	Manufacturers Plus, Inc.
Address	1234 Main Street
City	Beverly Hills
State	CA
Zip	90210
Country	USA
Contact Name	Jane Smith
Contact Telephone Number	555-555-5555
Contact Email	carbtestmfr1@yopmail.com
CARB Customer Number	TEST1001

**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	Test File 1	Calendar Year 2023	1001	Aerodynamic technologies	Base	\$ 2,952.00
2	Test File 2	Calendar Year 2022	1002	Fuel-fired heater	Base	\$ 293.00
<b>Total Due</b>						<b>\$ 3,245.00</b>

I, [[Sig\_es\_signer1 signature]], attest that any information provided is true, accurate, and complete.

APPROXIMATE FEE SCHEDULE

[Previous](#)   [Next](#)

For the attestation, your responsible party is required to sign the document. Add the responsible party's email address to the space below to sign the invoice. To initiate signatory process (through Adobe Sign), Click **[Send]** button.

Create Invoice

Send for Signature

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

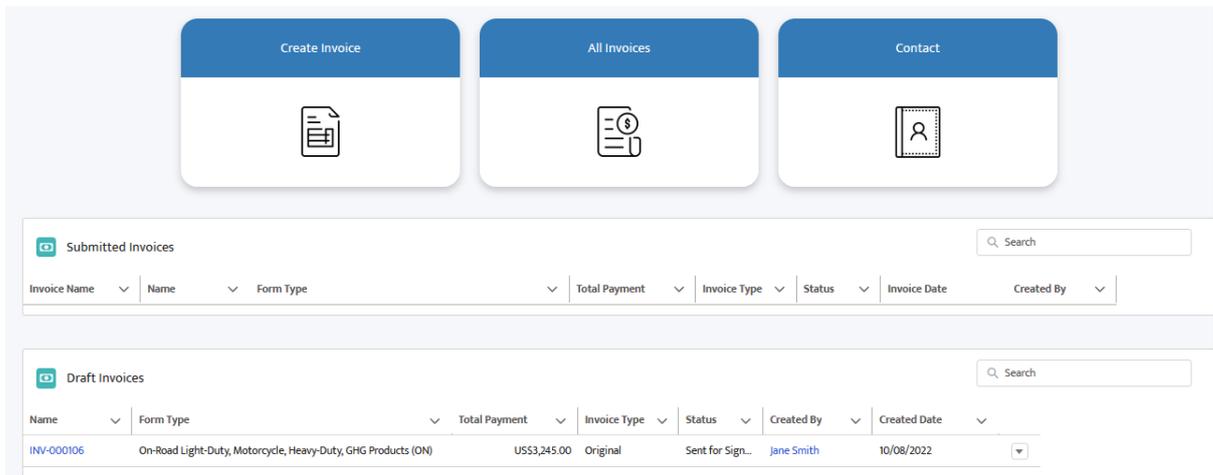
carbtestmfr1@yopmail.com

[Previous](#)   [Send](#)

You will receive the following confirmation message once the invoice is sent for signature.



Click **[Next]** to be redirected to the home page. You can view the submitted invoices under the “Draft Invoices” section, with the invoice status set as “Sent for Signature.”



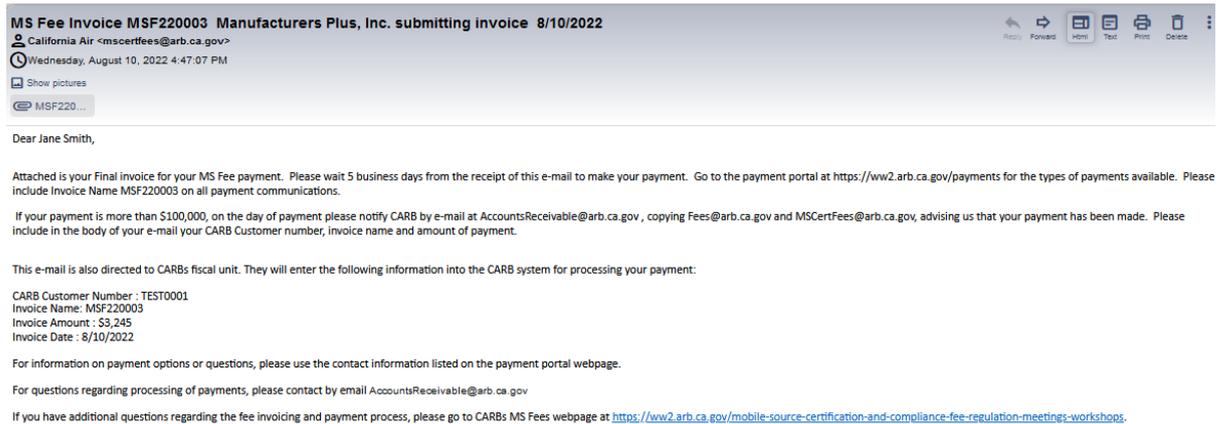
The following email will be sent to the responsible Manufacturer representative for E-Signature:



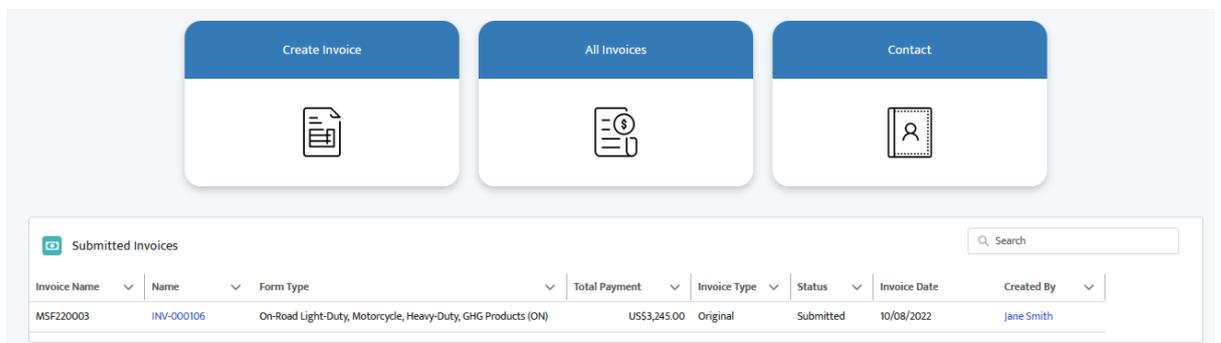
After clicking **[Review and sign]**, you can review details and add the e-signature before submitting. At the time of approval of signature, the signee can save a copy of the signed invoice.

The following email will be sent to you as an Invoice submission confirmation along with the signed invoice as an attachment. In addition, this e-mail is sent to CARB's Revenue and Reimbursement Unit to add the information into the associated CARB Customer account. Payment is done outside of this software system.

**Please go to [ww2.arb.ca.gov/payments](https://ww2.arb.ca.gov/payments) for more information on how to make a payment. Wait 5 days before making your payment to ensure your information is entered into the CARB Customer account.**



You can view all submitted invoices in the home page, as shown below. Once payment is confirmed, the invoices can be found under the "All Invoices" button.



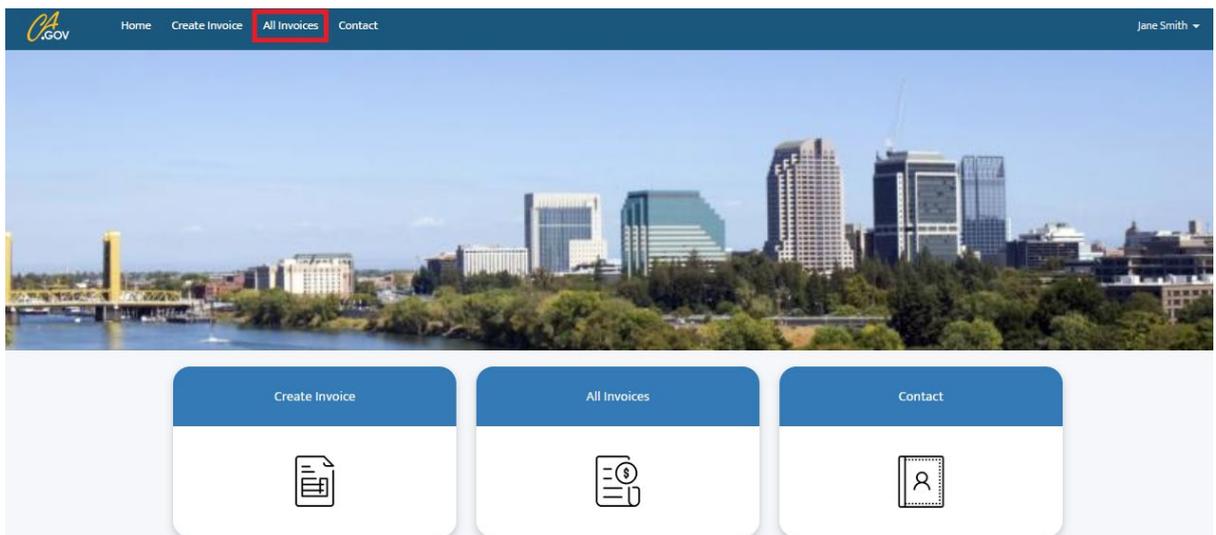
#### 4.0 Payment Confirmation Email

CARB administration unit will then confirm the payment once processed. After you submit the invoice and make the payment, CARB then verifies the payment, and confirms the payment has been made in the system. The following email will be sent to you to confirm payment.



## 5.0 All Invoices

You can access all invoices by navigating to **[All Invoices]**



Click **[All Invoices]** to be redirected to the following page:

Invoice Name	Name	Form Type	Total Payment	Invoice Type	Invoice Date	Status
MSF220001	INV-0000249	On-Road Light-Duty, Motorcycle, Heavy-Duty, GHG Products (ON)	\$3,245.00	Original	6/30/2022	Submitted
MSF220092-2	INV-0000245	Off-Road Vehicles/Engines and Equipment (OFF)	\$2,714.00	Revision	6/26/2022	Sent to Manu...
MSF220093-3	INV-0000239	Evaporative Components and Portable Fuel Containers (EVAP)	\$3,109.00	Revision	6/29/2022	Refund Confir...
MSF220093-2	INV-0000238	Evaporative Components and Portable Fuel Containers (EVAP)	\$3,593.00	Revision	6/27/2022	Payment Con...
MSF220093-1	INV-0000235	Evaporative Components and Portable Fuel Containers (EVAP)	\$3,338.00	Revision		Payment Con...
MSF220093	INV-0000181	Evaporative Components and Portable Fuel Containers (EVAP)	\$4,281.00	Original		Payment Con...
MSF220092-1	INV-0000175	Off-Road Vehicles/Engines and Equipment (OFF)	\$3,088.00	Revision	6/26/2022	Payment Con...
MSF220092	INV-0000174	Off-Road Vehicles/Engines and Equipment (OFF)	\$3,088.00	Original	6/26/2022	Payment Con...

There are multiple status categories:

- Draft
- Sent for Signature
- Submitted
- Sent to Manufacturer
- Payment Confirmed
- Refund Confirmed
- Modification Confirmed

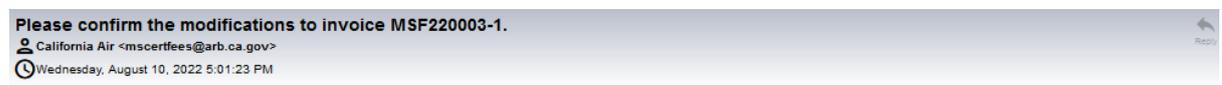
## 6.0 Updating an Invoice. Creating an Adjusted Invoice.

Program Staff can create an adjusted invoice upon request or if there is an issue with the fee type selected, after signature or payment. The type of adjusted invoices include:

- No Payment Change (Unique ID or other Update)
- Underpayment
- Refund

Program Staff will initiate the adjusted invoice process and make necessary changes and have it “Sent to Manufacturer” for review and signature.

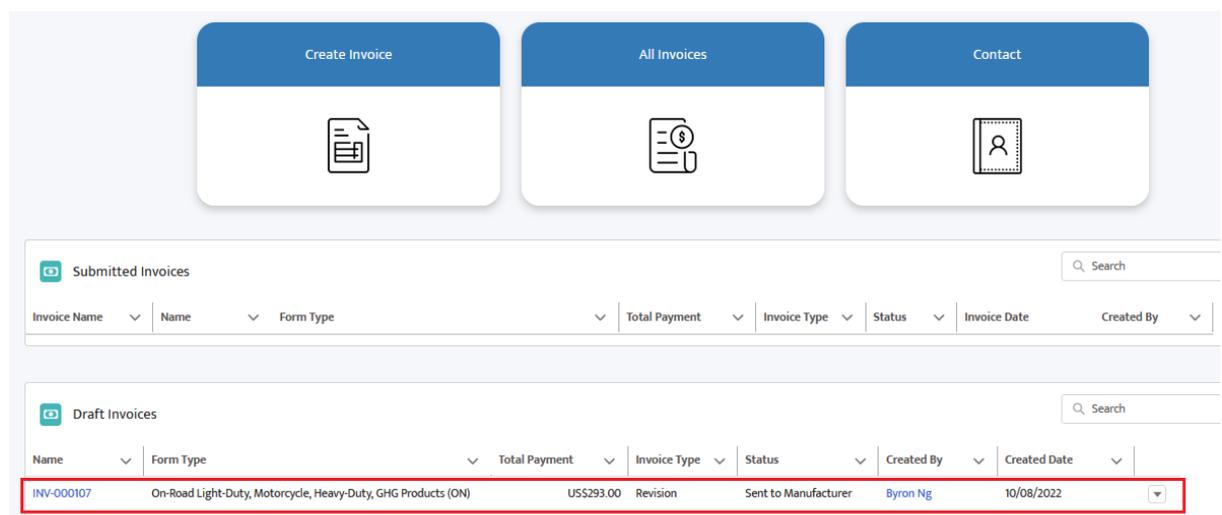
The following email will be sent to you for modifications to the paid invoices. Click the link in the email below to navigate to the online portal, where the adjusted invoice is located to review changes and submit that adjusted invoice.



Please confirm the modifications to invoice MSF220003-1.

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.

Manufacturers can see the **Adjusted** invoice with status as “**Sent to Manufacturer**” in the home page under Draft Invoices section. Please refer the screenshot below.



## 6.1 Review Adjusted invoice and E-sign

As a Manufacturer you can navigate to update the invoice either by clicking the link from the email or from the home page under Draft Invoices. Once you click, you will see the page below

Update Invoice Name - MSF220003-1

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

Company Information      Application Information      Preview      Sent for Signature

\* Company Name  
Manufacturers Plus, Inc.

Address  
1234 Main Street

City  
Beverly Hills

State  
CA

Zip  
90210

Country  
USA

Contact Name  
Jane Smith

Contact E-Mail  
carbtestmfr1@yopmail.com

Contact Telephone Number  
555-555-5555

CARB Customer Number  
TEST0001

[Next](#)

Here you can update company information on the updated invoices. Click **[Next]** to view the Application Information details, as shown below

Update Invoice Name - MSF220003-1

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      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	1001	Calendar Year	Aerodynamic	Base	2952	1001	Calendar	Refund	Full Refund	0	-2952.00
2	1002	Calendar Year	Fuel-fired heater	Base	293		Select M.	Select Ca.	Select Fe.		0.00
<b>Total Invoice MSF220003 Paid</b>					US\$3,245.00	<b>Total Corrected Total Due</b>					US\$0.00 -US\$2,952.00

[Previous](#)      [Save & Next](#)

Here, you can review the application details. Click **[Save & Next]** to preview updated invoice as a 'PDF'.

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,"mmmm dd, yyyy"))}

COMPANY INFORMATION

Company Name: Manufacturers Plus, Inc.  
Address: 1234 Main Street  
City: Beverly Hills  
State: CA  
Zip: 90210  
Country: USA  
Contact Name: Jane Smith  
Contact Telephone Number: 555-555-5555  
Contact Email: carbtestmfr1@yopmail.com  
CARB Customer Number: TEST0001

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	1001	Aerodynamic technologies	Base	\$ 2,952.00	1001	Refund - No application submitted	Full Refund (100%)	\$ 0.00	-\$ 2,952.00	
2	1002	Fuel-fired heater	Base	\$ 293.00	1002	Fuel-fired heater	Base	\$ 293.00	\$ 0.00	
<b>Total Invoice (MSF220003) Paid</b>				\$ 3,245.00	<b>Total Corrected</b>				\$ 293.00	
									<b>Total Due</b>	-\$ 2,952.00

Notes  
Please review the changes

I, {Sig\_es\_signer1:signature}, attest that any information provided is true, accurate, and complete.  
(Resubmit Fee Signature Here)

[Previous](#)      [Next](#)

After reviewing the updated invoice details, click **[Next]** to add a recipient for the signature, as shown below: Please remember the invoice must be signed by the manufacturer’s responsible party.

Update Invoice Name - MSF220003-1  
 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 **Next**

You will receive the following confirmation message once the invoice is sent for signature.

Update Invoice for Manufacturer  
 Invoice submitted and successfully initiated for signature. For the next step, please check the email 'carbtestmfr1@yopmail.com' for instructions to sign the invoice. Check your junk mail folder if instructions are not received.

**Next**

Click **[Next]** to be redirected to the home page. The invoice will be listed under the “Draft Invoices” section with the invoice status set as “Sent for Signature.”

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

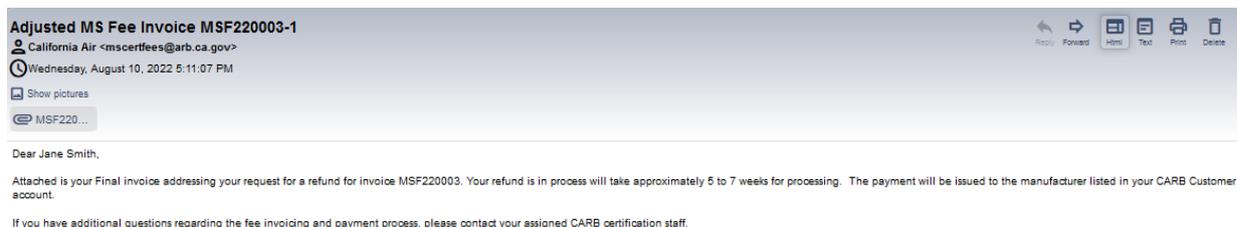
Name	Form Type	Total Payment	Invoice Type	Status	Created By	Created Date
INV-000107	On-Road Light-Duty, Motorcycle, Heavy-Duty, GHG Products (ON)	US\$293.00	Revision	Sent for Signature	Byron Ng	10/08/2022

The following email will be sent to the manufacturer’s responsible party for E-Signature.



After clicking **[Review and sign]**, review the details and your e-signature before submitting. A new invoice number will be assigned to the invoice based on the iteration of the original invoice: original invoice name-1, -2 etc. depending on the number of adjustments made to the original invoice.

The following email will be sent to you for the Invoice submission confirmation, along with the signed invoice as an attachment. In case of the updated invoice being **Refund Only**, the following email will be sent regarding the refund process.



In case of an **Underpayment Adjusted Invoice**, you can pay the balance shown on the invoice plus any additional bank fees by following the instructions on CARB's payment webpage.