

INSTRUCTIONS

Consumer Products Reporting Tool for Formulators

If a Responsible Party does not have the ingredient information for products submitted for the 2023 Consumer and Commercial Products Survey (2023 Survey), they will have identified those products as being formulated by a formulator in the Consumer Products Reporting Tool (CPRT). In these instances, California Air Resources Board (CARB) staff will use the submitted .csv files from the Responsible Party to generate a unique version of the Consumer Products Reporting Tool for Formulators (CPRTF) that contains the formula name and a product name to send to the formulator for completion. The product formulators are then required to submit ingredient data for these products to CARB. A link to a secure mailbox will be provided. In order to electronically facilitate this process and to ensure confidentiality of product formulations held by formulators, CARB staff has developed the CPRTF tool to allow formulators to submit ingredient data to CARB. This document describes the function and use of the CPRTF.

The CPRTF is designed for product formulators

All requested formulation information **must** be interactively entered into the CPRTF or imported into the CPRTF from company specific databases. The CPRTF will be made available for download Kiteworks. CARB staff will reach out to formulators and grant them access to a personalized Kiteworks folder with an custom version of the CPRTF to download. Once the CPRTF is downloaded, formulators should save it to their desktop.

Overview of the Formulator Reporting Tool

The CPRTF is designed to input data interactively or via import. The determining factor for using the interactive or import features will vary by company but will mainly be dictated by size. A company with a small amount of data will likely use the interactive feature, while a larger company may choose to use the import function. When using the data import feature, formulation data must be saved in a comma delimited file, or *.csv format (CSV). The CPRTF will not accept data in any other format (e.g., Excel). A CSV is a record-based text file that prevents the introducing of macros or malware. The CPRTF upload feature uses the *.csv format to enhance confidentiality of data being submitted.

Note: Users must import all their formulation data into the CPRTF for internal data checks. It is **NOT** acceptable to directly submit unprocessed CSV files to CARB.

Designation of Confidential Information

In accordance with Title 17, California Code of Regulations (CCR), sections 91000 to 91022, and the California Public Records Act (Government Code Section 6250 et seq.),

State law protects the confidentiality of trade secrets. The full citations of these sections are provided at: <https://govt.westlaw.com/calitelist> and <http://www.leginfo.ca.gov/calaw.html>.

All information contained in submitted survey data will be treated as “confidential information.” A note is located at the bottom of the Start page indicating confidentiality for all information provided to CARB.

Getting Started

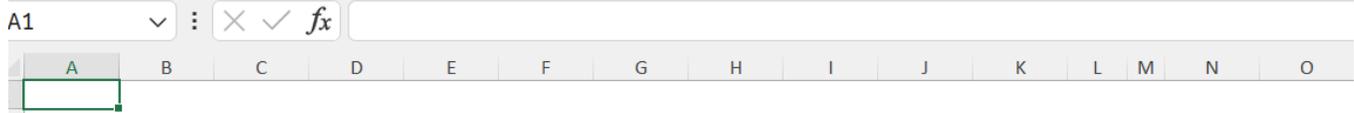
The CPRTF will be provided to formulators through an encrypted mailbox called Kiteworks. Once Responsible Parties submit the CPRT to CARB, CARB staff will create custom versions of the CPRTF for formulators to fill out. CARB staff will then provide a secure link to the formulator contact listed by the Responsible Party in the CPRT to download the CPRTF from Kiteworks.

CARB staff will send two emails to formulators through Kiteworks: one giving access to the folder where the CPRTF will be located, and another requesting they download the CPRTF. When the Formulator clicks either of these links, it will send them to Kiteworks where they will be prompted to create a Kiteworks account. They can then access the folder and download the CPRTF. For more details on this process watch CPRTF Module 1: Getting Started, which is located on the [CPRT Webpage](#).

Before entering data, getting familiarized with the CPRTF setup will provide ease of navigating through the tool. The following sections summarize Menu button located on every page, the legend on the Start page, and the Start Page. Instructions on entering data will follow these sections.

The order of the following descriptions is consistent with the order that CARB staff recommends for using the CPRTF.

The CPRTF document must be unblocked from Security settings to access it. A warning from Privacy Settings will appear at the top of the page if the document is blocked with the following message, “ **Privacy Settings Applied: Your account privacy settings are being applied to this device.** To adjust your settings go to privacy settings. See the image below:

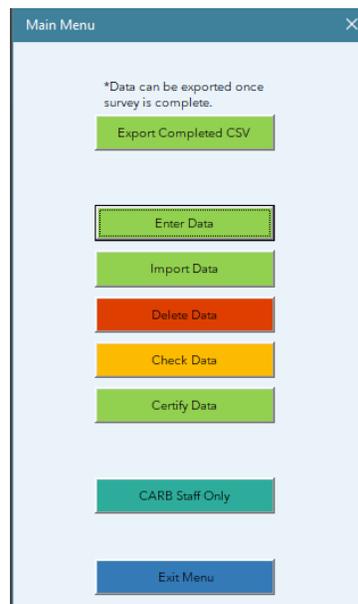


To unblock it, find the file in your file manager application (i.e. files explorer) and right click on the document to open properties. Under "Security" in the "General" tab, make sure the "unblock" Checkbox is selected. If the security section does not exist in the General tab, then the CPRTF has already been unblocked.

Note: Before entering data, enable macros for the CPRTF. Go to Options > Trust Center > Trust Center Settings > Macro Settings, and then selecting 'Enable VBA macros'.

Menu

As a general guide to navigate from page to page, the CPRTF has a Menu that can be accessed from any page of the tool. Click the **"Menu"** button on any page of the tool to open the Main Menu.



The Main Menu has several buttons that can be used to manage data for the CPRTF, explanations for each are below:

Enter Data: Clicking this button opens the Data Entry Menu and allows users to begin entering data into the CPRTF. Users may then select one of the following

buttons to fill out either the Formulation form or the Solvent Manufacturer form. To return to the Menu, select the Main Menu button.

Import Data: Clicking this button opens the Import Menu and allows users to begin entering data into the CPRTF. Users may then select one of the following buttons to fill out the corresponding form: ProductIngredients, SolventManufacturer, FragranceFormulator, or Import all. To successfully import data, the file must be saved as a CSV. The headers for the CSV must match the headers of the page the data is being imported into. To avoid difficulties importing data, the CSV structure being imported must match the structure of the worksheet being imported to (e.g. columns and column headers all in the same order as they appear in the tool). The Import all button does not import all CSVs at once, it allows users to go page by page and import CSVs. To return to the Menu, select the Main Menu button.

Delete Data: Clicking this button opens the Delete Data Menu that allows users to delete entries from the ProductIngredients page, SolventManufacturer page, or all data.

Check Data: Clicking this button opens the Data Check Menu that allows users to perform a series of data checks on forms for the Product Ingredients and Solvent Manufacturers prior to submitting and exporting data to CARB.

Certify Data: Clicking this button opens the Certification form that allows users to document survey compliance.

Export Completed CSVs: Clicking this button allows the Formulator to generate a CSV file to send to CARB. Before the export begins, the tool will automatically run the full error checking report from the Validate_Survey page and ensure no errors occur. If errors occur, they will need to be fixed before the export can be complete. CARB will then contact any entities reported in the FragranceFormulators page or SolventManufacturers page in order to collect formulation data.

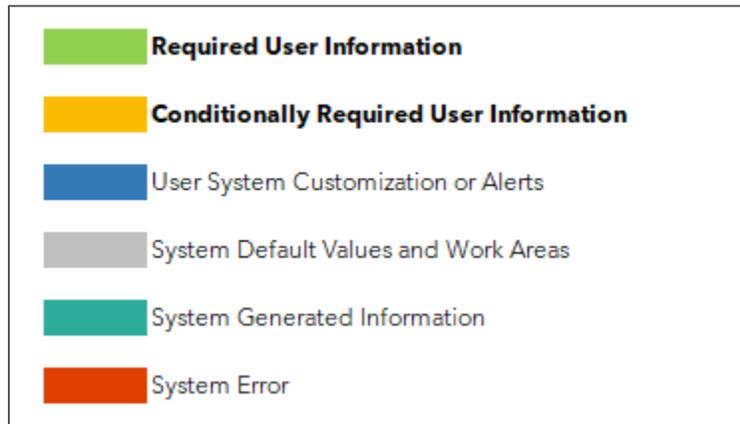
CARB Staff Only: This button is to be accessed only by CARB staff and is not for Formulator use.

Exit Menu: This button closes out of the Menu.

Note: The Menu button is located towards the top of every page of the CPRTF.

Legend

Since not all fields must be filled out by the Formulator, the CPRTF uses different colors to identify those responsible for each field. Take note of the legend below:



Note: The legend is available on the bottom left of the Start page.

Each color coincides with a user's responsibility, and all tabs and buttons are colored by category. Each green area/button should be filled out or used by the Formulator filling out the Survey. Yellow areas/buttons should be filled out on a case-by-case basis. Other colors indicate information that is automatically generated. Note that "System Generated Information" fields/buttons are to be completed/used by CARB staff, and the Formulator does not have to complete those areas.

Start Page

The first page of the CPRTF is the Start Page. This is the landing page of the CPRTF. It includes the legend mentioned in the previous section and two administrative buttons that allow users to navigate between pages and save the CPRTF.

Below is a description of both buttons found on the Start Page. The bold type corresponds to the button in the form, followed by a description for the button's function.

Menu: This button opens the Main Menu, refer to the previous "Main Menu" section.

Save: This button allows users to save the work they've done on the CPRTF so they can exit without losing progress. It's recommended to use this Save button instead of the Save option under File, as it is more reliable.

Entering Data

There are three ways to enter data into the pages of the CPRTF:

1. Using the built-in forms on each page. To access a built-in form, first navigate to the page on which you would like to enter data. Click the “Add ...” button near the top of the page and that page’s form will then be opened.

Each built-in form has a few buttons to help users submit data and navigate the survey tool. Below is a detailed description of each button found in the applicable built-in form for the page. The bold type corresponds to the button name in the form, followed by a description for the button’s function.

Menu: This button returns the user to the Main Menu.

Go To Table: This button exits out of the form and goes to the applicable CPRTF page table.

Clear Fields: This button clears the data fields below. When clicked the data entry page will clear and then automatically clear the entries in the applicable page.

Save Record: This button saves the data entered by the user and adds it to the page. If the data is not valid, an error message will be displayed.

2. Using manual entry. Each page allows users to manually enter data directly into the page. Because manually entered data is not validated until the report on the Validate Survey page is run (please refer to “Validating Data” section further down), it is recommended to use the built-in form option until the reporting requirements for the page are well understood.
3. Using data imported from a CSV. To read more about how to import data into the tool from a CSV, please refer to the “Importing Data” section below.

Note: Both manually entered data as well as imported data are not validated until the report on the Validate Survey page is run (please refer to “Validating Data” section further down). It is recommended to use the built-in form option until the reporting requirements for the page are well understood.

Most pages allow for all three methods of data entry except for the Certification page. The Certification page only permits through a built-in form for data entry.

The following sections describe each of the pages where data is requested as well as definitions for the data fields being requested. Additionally, the "Importing Data" section describes how to import CSV files to each page using the functions in the tool.

Contact Information

The contact information requested will assist CARB in characterizing who is submitting the survey. The contact information can be filled out manually or by using the form on the ContactInformation page. Below is a detailed description of each data field. The bold type corresponds to the data field header in the CPRTF, followed by a description for the data field.

Street Address: Enter the complete mailing address for the company listed above.

Note: Foreign-based Companies: Enter the street address for the company listed above. Enter the country name in the "State" data field. Enter either the postal code or the number "1" in the "Zip" data field.

Company Contact: Enter the name, title, telephone number, and email address for the person to be contacted by CARB staff if clarifications are needed for the information submitted.

Products

Product Information will be filled out by the Responsible Party. However, there is some data the Formulator must fill out. Below is a detailed description of each data field. The bold type corresponds to the data field header in the CPRTF, followed by a description for the data field.

Product Density: For products filled by volume **only** (e.g. milliliters (mL)), provide the density in grams per milliliter (g/mL). If the product is not filled by volume, then please enter the default density of "1" in this data field.

Fragrance & Comment

The data field below relates to the fragrances. This information is only required to be filled out if the formulator has this information. If the formulator fills out fragrance information they must also fill the Fragrance Formulator contact information.

Fragrance Name: Enter the name of the fragrance, as provided by the Fragrance Formulator.

Note: Formulators that are also the Fragrance Formulator must enter the fragrance name here.

Fragrance Formulator: Select/Enter the Fragrance Formulator from the dropdown menu. The Fragrance Formulator information was entered under the Fragrance Formulator button on main Enter/Import Menu. If a product has more than one Fragrance Formulator, enter the Fragrance Formulator that contributes the most to the overall (percent, weight-wise) to the fragrance weight percent.

Note: Formulators that are also the Fragrance Formulator may either enter in "self" or leave the Fragrance Formulator field blank. Formulators that are also Fragrance Formulators do not need to fill out Fragrance Formulator contact information for the applicable fragrance.

Fragrance Tracking Code: Enter the fragrance tracking code, as provided by the Fragrance Formulator.

Note: Formulators must enter the fragrance tracking code for fragrances generated "in-house."

The following three data fields are specific to concentrated products. If your product displays dilution recommendations on the label, you must enter the dilution ratio minimum, maximum, and specify the diluent in the applicable data field. If your product does not display dilution recommendations on the label then you have completed the required product information.

Comments: Provide any comments that will help us understand your product or how you have filled out the survey for this product.

Note: As described above, if your product uses more than one Fragrance Name, Fragrance Formulator, and Fragrance Tracking Code, please list that information here.

For Example: A liquid/pump spray air freshener product is formulated using three separate fragrances that may or may not be supplied from the same fragrance house. After entering the most representative fragrance information in the applicable fragrance data fields, enter the remaining fragrance names,

fragrance tracking codes, and Fragrance Formulator information as a comment in the comment data field.

Note: All product information provided to CARB will be treated as confidential.

Users that hold the formulation information are now ready to begin entering formula information into CPRTF's Formulations section.

Formulation Data (Product Ingredients)

How to Report Formulation Data:

To enter in product ingredients, users can either import data into the ProductIngredients page or enter data into the EnterFormula page. The ProductIngredients page stores all formulations entered into the EnterFormula page. It is not recommended for users to start by entering information manually into the ProductIngredients page as errors will not be caught. First enter data into the EnterFormula page to familiarize yourself with the ProductIngredients fields before importing any data. Click the "Product Ingredients" button on the "Enter Data" Menu to begin or go to the EnterFormula page.

CARB staff will provide a copy of the CPRTF with the information submitted by the Responsible Party necessary to complete the Formulations information section below. All Formula Names will be available via the dropdown menu on the EnterFormula page.

What ingredients to Report:

List all ingredients that comprise at least 0.1 weight percent (Wt. %) of the product. Additional Information for Reference:

- List of common product ingredients reported for the past surveys is available in a separate Excel file (please see Appendices C, D and E). This includes volatile organic compounds (VOCs), low vapor pressure VOCs (LVP-VOCs), and select Inorganic compounds.
- Specific reporting requirements for Hydrocarbon Solvent mixtures, Inorganic compounds, Grouped Totals, and Other Specific ingredients are listed below.
- Fragrance should be reported as a single and distinct ingredient, even at levels below 0.1 percent.

EnterFormula Page:

The EnterFormula page provides several functions to help assist users with reporting formulation information.

To report a formulation using the EnterFormula page, follow these steps:

1. Select a Formula from the dropdown menu. These Formula Names are populated by the Formula Names reported on the ProductList page. If you do not see the Formula Name you need, then it has not yet been reported on ProductList.
2. Fill out the necessary columns for ingredients and hydrocarbon solvents (refer to definitions below). This can be done by entering in data manually to EnterFormula or by using the "Select Chem" button to select pre-listed chemicals that are present on the CARB_Chem page.
3. Ensure the total weight percentage of your formulation totals to 100%. The Total weight percent is always displayed at the top of the page and it represents a total sum of all the weights currently listed in the Wt % column.
4. Click the "Save Record" button.
5. If there are any errors with the data entered, errors will be displayed in the "ErrorList" column.
6. If there are errors, fix them and attempt to save the record again. If there are no errors, then the record will be saved and transferred to the ProductIngredients page.

Note: If a chemical or Chemical Abstract Service (CAS) number reported closely matches with one of the pre-listed chemicals on the CARB_Chem page, the EnterFormula page will recommend that you change the data to match what is in the CARB_Chem page as shown below. It is optional to make this change by clicking either "Make Change" or "Keep Current". Making this change may help CARB process data quickly, but is not required.

Correcting Chemical Name Form ×

A correction is recommended to a chemical you entered.

Worksheet: EnterFormula

Row: 8

Chemical Name: carbon dioxide

CAS: 123

Suggested Corrections (select only 1):

Chem Name	CAS #
carbon dioxide	124389

Once "Make Change" is selected, your entry is overwritten with the suggested correction. Your original value can not be recovered.

*This form is being displayed because the CAS # or Chemical Name entered was associated with another chemical name(s) within our internal database.
It is recommended, but not required, to change the name to one of the above suggestions.

Below is a detailed description of each data field on the EnterFormula and ProductIngredients pages. The bold type corresponds to the data field header in the CPRTF, followed by a description for the data field.

Total Wt Percent: This field is automatically calculated and populated as the user begins to enter ingredient information in the data fields below. All ingredients listed below must total to 100 weight percent in this box.

Information required for each ingredient listed:

Chemical Name: Click on the Select Chem button to enter in ingredients or enter in ingredient name manually.

Note: You can use the "Search by CAS" function in the top right of the Select Chem form to locate chemicals

Grouped Totals

The dropdown menu includes several terms to describe the options for grouping ingredients. The sections "Reporting fragrance content", "Grouped Inorganic Compounds", "Grouped VOCs that are each less than 0.1 Wt. %", and "Grouped LVPs" (below) describe these listings in the dropdown menu.

Reporting fragrance content: Aggregate all fragrance together and enter the total by selecting "fragrance" from the Select Chem form. Fragrance should be reported as a single and distinct ingredient, even if present at levels below 0.1 percent.

For Example: If more than one fragrance is used in this product, aggregate the amount of fragrance entered in the fragrance data fields with the amount of fragrance(s) entered as a comment in the comment section. Select "fragrance" from the dropdown menu and enter the total amount (wt%) of fragrance in the product.

Below is a description of the term "Grouped Inorganic Compounds."

Grouped Inorganic Compounds: Aggregate all inorganic compound ingredients together and enter the total by selecting "grouped inorganic compounds " from the Select Chem form. Enter the aggregated weight percent of all inorganic compound ingredients except for several specific ingredients listed below:

- Water (H₂O)
- Ammonium chloride (NH₄Cl)
- Ammonium hydroxide (NH₄OH) *i.e.* ammonia in solution
- Hydrogen peroxide (H₂O₂)
- Compressed air
- Carbon dioxide (CO₂)
- Nitrogen (N₂)
- Nitrous oxide (N₂O)

The eight inorganic compounds listed above are listed as specific ingredients in the CPRT dropdown menu.

Examples of Grouped Inorganic Compounds include: calcium carbonate, hydrochloric acid, mica, pumice, silica, talc, titanium dioxide, etc.

Below is a description of the term "Grouped VOCs that are each less than 0.1 Wt. %" in the dropdown.

Grouped VOCs that are each less than 0.1 Wt. %: Aggregate all VOC compounds for which each individual compound comprises less than 0.1 weight percent together and enter the total by selecting "grouped vocs that are each less than 0.1 wt" from the Select Chem form.

Below is a description of the term "Grouped LVP" in the dropdown.

Grouped LVP: Aggregate all other non-volatile organic compounds. (Do not include chemicals listed in Appendix C.

Examples include: botanicals/herbal extracts, colorants, enzymes, organic solids, resins/polymers, surfactants

For Example: beeswax, cellulose, corn starch, non-volatile silicones, oils, non-volatile polymers, sodium xylenesulfonate, styrene butadiene rubber, tallow, triclosan, urea, xanthan gum, paraffin wax, mineral oil

Note: Surfactant VOCs **must** be reported as speciated individual ingredient.

Note: Solvent or liquid carrier within the resin system **must** be reported as individual ingredients.

CAS Number: If a compound chemical name is listed in the dropdown menu in the CPRTF, the CAS number will automatically be populated. If a compound is not listed, manually enter the CAS number. The CAS number for the compound or mixture must be obtained from your supplier.

Note: If your supplier does not provide a CAS number, please contact CARB staff by email at: 2023CPSurvey@arb.ca.gov. Please include the name of the ingredient, and if available, the tradename and manufacturer in the email. CARB staff will reply to confirm the absence of the CAS number or provide users with the appropriate CAS number to use in the CPRTF.

Note: If there is not a CAS number assigned to your chemical in the dropdown list, it is not needed. In this case you can enter "NA" into the CAS # field.

Note: CAS number and chemical name are optional for Hydrocarbon solvents. Examples of Hydrocarbon solvents include: Mineral Spirits, mixed Xylenes, VM&P Naphtha, Petroleum Distillates, *etc.*

Note: Do not include dashes when entering the CAS number into the CPRT. The CPRTF will automatically remove them.

Weight Percent: Enter the weight percent of the ingredient, to the nearest 0.1 Wt %. If the ingredient is a mixture of known components, list the weight percentages of the individual components.

Note: If the product is sold as a concentrate, list the weight percent as sold (undiluted).

The next four data fields are specific to Hydrocarbon solvents.

Trade Name: Enter the name given to the Hydrocarbon solvent by the manufacturer.

Note: Hydrocarbon solvents must have a trade name listed.

Manufacturer Name: Enter the name of the company that manufactures the Hydrocarbon Solvent.

Note: Hydrocarbon solvents must have a manufacturer listed.

Bin #: If the Formulator knows the Bin Number for the Hydrocarbon Solvent, list here. Otherwise, enter 'na'. The Manufacturer listed by the Formulator will be contacted by CARB staff to confirm the Bin #.

Note: A list of commonly used hydrocarbon solvents, bin numbers and other information are provided in Appendix D.

Fragrance Formulator

If the Formulator holds the fragrance ingredient information, then that company will complete the applicable data fields.

Note: If the Product Formulator is also the Fragrance Formulator, then the Product Formulator can mark "self" and does not need to complete contact information for fragrances generated "in-house."

If the Responsible Party does not hold the fragrance ingredient information, the Product Formulator will submit the information. The contact information for each Fragrance Formulator will only need to be entered once. This section can be filled out after or before the ProductList page, but it is recommended, especially for larger companies importing information, that it be filled after. If a product has Fragrance Formulators, the names must match what is entered in other pages.

Note: Users will only need to enter each Fragrance Formulator contact information once.

Below is a detailed description of each data field. The bold type corresponds to the data field header in the CPRTF, followed by a description for the data field.

Fragrance Formulator Company Name: Enter the name of the company that holds the ingredient information for the product(s) being submitted.

Address: Enter the complete mailing address for the Fragrance Formulator company listed above.

Note: Foreign-based Companies: Enter the street address for the company listed above. Enter the country name in the “State” data field. Enter either the postal code or the number “1” in the “Zip” data field.

Fragrance Formulator Contact: Enter the name, title, telephone number, and email address for the person to be contacted by CARB staff if clarifications are needed for the product ingredient information submitted.

Click the “Save Record” button to save entered information and return to the FragranceFormulator page.

Note: All Formulator information provided to CARB will be treated as confidential.

Solvent Manufacturer(s)

This section is for Hydrocarbon Solvent Manufacturers. If the Formulator holds the solvent ingredient information, then that company will complete the applicable data fields.

If the Formulator does not hold the solvent ingredient information, the Solvent Manufacturer will submit the information. The solvent manufacturer name will need to be entered into the ProductIngredients page and EnterFormula page. This section can be filled out after or before the ProductList, the ProductIngredients, and the EnterFormula pages, but it is recommended, especially for larger companies importing information, that it be filled after. If a formulator uses solvent manufacturers, the names must match what is entered in this section if they choose to use the import function.

Note: Users will only need to enter each solvent manufacturer contact information once.

To enter in data to the SolventManufacturer page, formulators are given the option of using the built-in forms on each page. To access the built-in form, first navigate to the page on which you would like to enter data. Click the “Add Manufacturer” button near the top of the page and the form will then be opened.

Below is a detailed description of each data field. The bold type corresponds to the data field header in the CPRTF, followed by a description for the data field.

Solvent Manufacturer Company Name: Enter the name of the company that holds the ingredient information for the product(s) being submitted.

Address: Enter the complete mailing address for the solvent/propellant manufacturer company listed above.

Note: Foreign-based Companies: Enter the street address for the company listed above. Enter the country name in the "State" data field. Enter either the postal code or the number "1" in the "Zip" data field.

Solvent Manufacturer Contact: Enter the name, title, telephone number, and email address for the person to be contacted by CARB staff if clarifications are needed for the product ingredient information submitted.

Click the "Save Record" button to save entered information and return to the SolventManufacturer page.

Note: All manufacturer information provided to CARB will be treated as confidential.

Importing Data

The following pages in the CPRTF allow for optionally importing data directly through a CSV:

1. ProductIngredients (Formulations)
2. FragranceFormulator
3. SolventManufacturer

Although data can be imported through a CSV, it is recommended at least for the first few data entries that the user does this manually or using the built-in forms to familiarize themselves with the data requirements for each page.

Import File Types Supported:

The files used for import must be saved as a *.csv format.

How to Access Importing:

Import Data: The "Import Data" button is located in the Main Menu. Click the Menu button located on any page then click on this button to upload saved CSV files into the CPRTF.

How to Import Data:

First the user must access the import menu through the main menu. Then the user will either select the sheet they wish to directly import into, or they can select the "import

all” button. The “import all” button will prompt the user to select a CSV for each page that allows for imports. The user can choose to skip pages they do not wish to import into.

Note: The same page can be imported into multiple times. Importing data does not delete any previously imported or manually entered data. If there are multiple CSVs to import on a page, simply re-open the import menu and repeat the process to import additional CSVs.

Note: The import function will only import CSVs into a page with matching headers. The header row from the CSV will be deleted when importing so just the data is included in the final import. Header templates for CSVs to be imported will be provided on the [CPRT webpage](#).

Note: Users will be responsible for deleting any data they erroneously import.

Finalizing Data

The following sections describe how users can use the tool functions to validate data to ensure minimal errors, digitally sign off on all data reported by certifying data, and export and submit finalized data to CARB.

Certifying Data

The CPRTF requires the user to certify data before exporting and submitting the csv files to CARB. This serves as an electronic signature certifying that all data submitted is correct and accurate to the best of the Formulator’s knowledge. Click the “Certify Data” button, located on the Menu form or in the Certification page.

Note: For the date of certification, enter in a number for the day, month, and year.

Validating Data

Before exporting data, the data must be validated. In the Validate_Survey page, the user may click the “Run Validation Report” button to check for errors being reported at any time. This report will output a description of the error as well as the page name and row number where the error has occurred. Based on the errors, go back to the page where the error is located and resolve them. Once the errors are fixed, Clear the Report and run another report to ensure no new errors.

Note: Fixing errors may result in new errors being reported. It is important to keep running the validation report and fixing errors until no errors remain.

Note: The data cannot be exported until the Validate_Survey report returns no errors. When no errors remain, a message stating “No Errors” will appear on the Validate_Survey page.

Note: If an error message says “WARNING”, then data can still be submitted without resolving the warning.

Note: If the user has a particularly large dataset, the validation report may take additional time to complete.

The Validate_Survey page also offers an extra check for ingredients. This option can be turned on or off by selecting the “Turn Off Chemical Correction Assistance (Not Recommended)” checkbox. As indicated by the name, this is not recommended since this is meant to assist with possible misspellings of a chemical name or mis-entry of CAS number. The validation report will compare the entered CAS number and chemical name with the CAS number and chemical name pairings on the CARB_Chem page in the CPRTF when the Chemical Correction Assistance button is on. If either of the entered values partially match with one or more of the rows in CARB_Chem, then the CPRTF will present a list of potential synonyms that can be selected to help avoid any data mis-entries. If the data entered matches exactly with the rows in CARB_Chem, then no suggested correction will be made.

Note: Because the list in CARB_Chem does not capture all possible synonyms of a chemical, this prompt does not mean that the entry is incorrect. It is optional to make this change by clicking either “Make Change” or “Keep Current”. Making this change may help CARB process data quickly but is not required. An example of a suggested change form is depicted on the next page.

Correcting Chemical Name Form X

A correction is recommended to a chemical you entered.

Worksheet: EnterFormula

Row: 8

Chemical Name: carbon dioxide

CAS: 123

Suggested Corrections (select only 1):

Chem Name	CAS #
carbon dioxide	124389

Once "Make Change" is selected, your entry is overwritten with the suggested correction. Your original value can not be recovered.

*This form is being displayed because the CAS # or Chemical Name entered was associated with another chemical name(s) within our internal database.

It is recommended, but not required, to change the name to one of the above suggestions.

Exporting Data

Click on the "Menu" button on any page of the CPRTF and then select "Export CSVs" to generate CSV files to send to CARB. A popup window will display that will explain to the user that the Survey will now be validated. Once the survey is validated, and no errors occur, the survey can be exported. Another popup window will display to select the file location to export the CSV files to. In the popup window, select location for files to be saved on the computer. Confirm by clicking "OK" in the next popup window. Once the export begins the screen **will start flashing** as the export is being completed. **Do not** close Excel while the export is still completing.

Note: If the Formulator has a large amount of data, a second prompt will display warning the Formulator that the validation may take some additional time.

Note: Do not edit the CSV files in any way before submitting them to CARB. This includes the name of the CSV file. A unique filename will be generated and should not be altered when saving.

After locating the exported files on your computer the user is ready to submit data to CARB. All CSVs, labels, and additional documents such as Safety Data Sheets, can be

submitted. Please refer to the section below on submitting data for more information. Use the secure link to Kiteworks

The final CSV files, including the certification CSV can be submitted to CARB beginning on December 3, 2024 up until the deadline submittal date on April 8, 2025.

Submitting Data

After CSVs have been exported from the CPRTF, the user is ready to submit data to CARB.

The same Kiteworks folder used to download the CPRTF is where users can upload all relevant documents including product labels and exported data CSVs. Users can use the same account they generated when downloading the CPRTF to access this folder.

Note: If the user loses their link to their Kiteworks folder to upload to, please email CARB staff at 2023CPSurvey@arb.ca.gov in order to receive a new one.

Required submittal documents:

1. Exported CSV files for the following pages:
 - a. ContactInformation
 - b. ProductList
 - c. ProductIngredients
 - d. FragranceFormulator
 - e. SolventManufacturer
 - f. Certification
2. All product label image files as described in the Entering Data page.

Once the files are uploaded to the Kiteworks folder, CARB staff will review the submittal. CARB staff will notify you via email if there are any issues with the submittal or additional information requested.

If there are questions regarding the formulator instructions, please email 2023CPSurvey@arb.ca.gov.