## CALIFORNIA DEPARTMENT OF FOOD AND AGRICULTURE

1220 N STREET, SACRAMENTO, CALIFORNIA 95814



## **DIVISION OF MEASUREMENT STANDARDS**

REGISTERED SERVICE AGENCY (RSA) PROGRAM

**RSA PORTAL USER GUIDE** December 23, 2022

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## Purpose

This Registered Service Agency (RSA) User Guide has been developed to provide a walkthrough of the new RSA system from both Agencies and Agents perspective.

Below are the detailed functionalities available for Agencies and Agents.

#### **Agency Functions**

- Login to Online Account
- Change Password
- View Agency Profile
- Update Contact Information
- View/Print Updated Registration
- Upload Standard Certification
- View Associated Agent Information
- Add/Delete Agents/Locations
- View Payment Activity
- Contact DMS
- Registration Renewal Submission

## **Agent Functions**

- Login to Online Account
- Change Password
- View Personal Profile
- Update Contact Information
- View/Print Updated License
- Add/Delete Associated Agencies
- Contact DMS

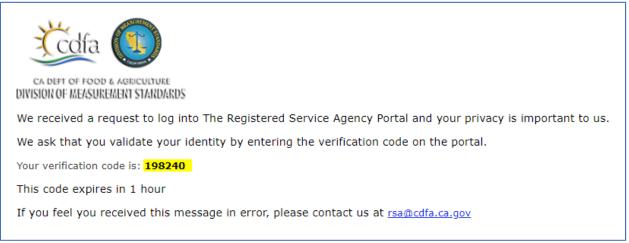
## **Agency Functions**

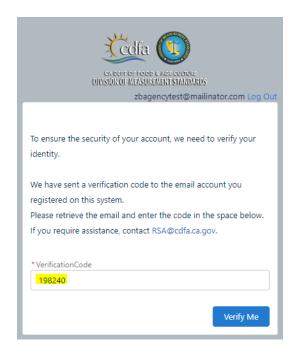
- Login to Online Account
  - o Go to: <a href="https://rsaportal.cdfa.ca.gov/s/login/">https://rsaportal.cdfa.ca.gov/s/login/</a>
  - o Enter Username and Password
  - Click Log in

Note: Password must include numbers, uppercase and lowercase letters, and at least one of these special characters: minimum 15 characters:  $!@\#\%^&^{0}_{-+-}{[]\setminus;:',:?/\sim><"}$ 



 Upon successful entry of Username and Password, a message appears to enter a verification code that is sent to the registered email address. Enter the verification code into the box and click the blue Verify Me button:



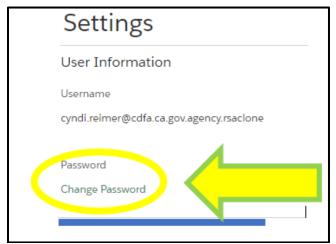


## **Change Password**

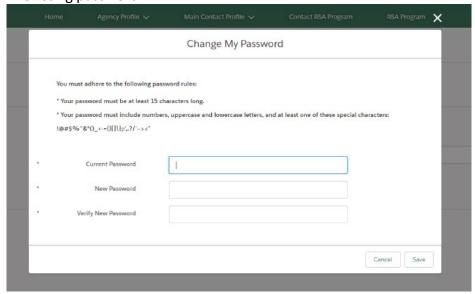
On top right, select the User Profile Icon - My Settings to see change password options.



Select Change Password

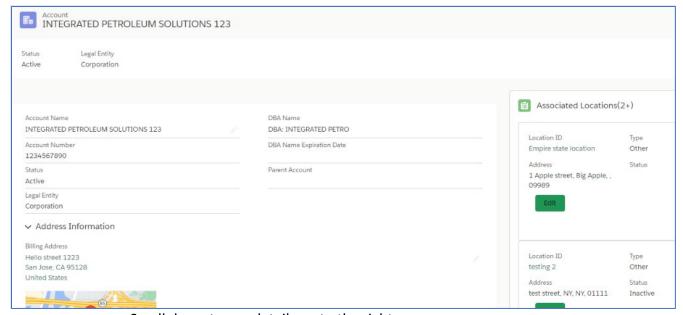


 Enter Current Password, New Password, and Verify New Password. Choose 'Save' to save new password or 'Cancel' to proceed without changing your existing password.



- View Agency Profile
  - Select Agency Profile → View Account





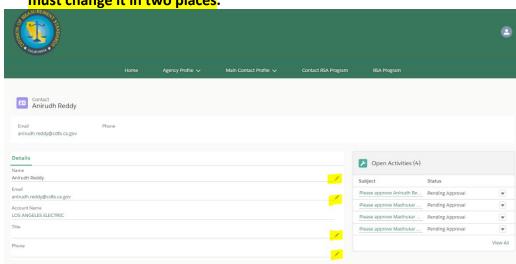
Scroll down to see details on to the right

## Update Contact Info

 Select Main Contact Profile → View Contact, to see your Email, Phone, Name, Account Name, Title

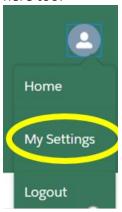


Select Pencil as highlighted to edit details. For your email to change, you must change it in two places.



1. Change it in the Section above: View Contact, and

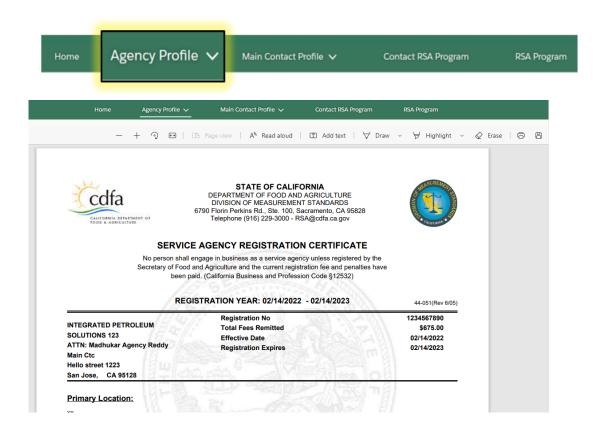
2. Select the User Profile Icon, **My Settings** and edit the email address here too.



 After changing the email address in these two places, an email will be sent to the original email on file with DMS, as well as the new email address provided. The emails contain a link that must be clicked to complete the change request.

### View/Print Updated Registration

 ○ Click on Agency Profile → Print Registration to view and print your Active Registration.



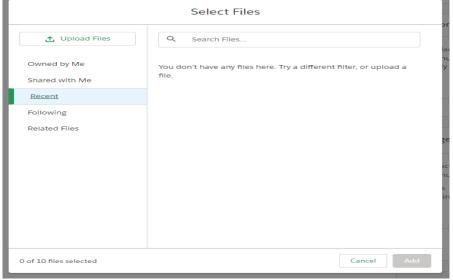
## • Upload Standard Certification



 ○ Click on Agency Profile → View Account on the right side of the page, scroll down to find "Files" placeholder at the bottom right of the page.



○ Click on "Add Files" → opens a pop up with Upload Files

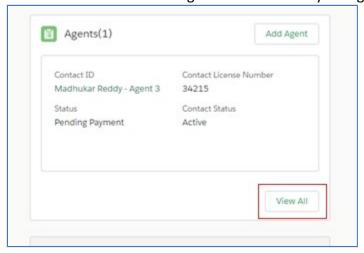


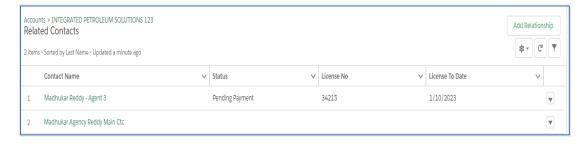
- Select "Upload Files" then select a standard certification file from your computer.
- Then Click on "Add".

### • View Associated Agent Information

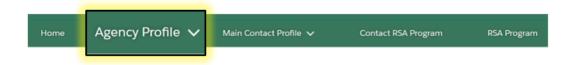


 Select Agency Profile → View Account, scroll down, and on the right side, find Agents placeholder which lists any agents associated to your Agency. Click on View All to see all Agents associated to your agency.

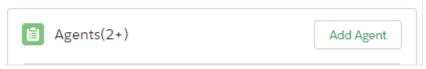




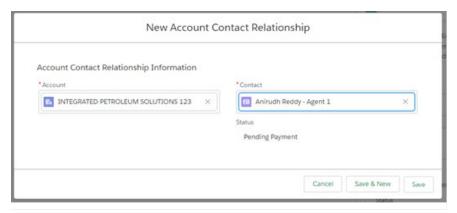
### Add Agent



Select Agency Profile → View Account, scroll down, and on the right side, find Agents placeholder.



Click Add Agent



- Type Agent Name in Contact, Select the Agent
- Choose Save

### Delete Agents



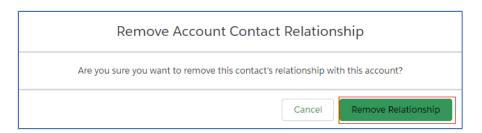
○ Select Agency Profile → View Account on the right side of the page, scroll down, find Agent's placeholder.



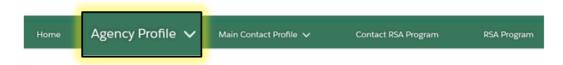
Click the downward triangle and select Remove Relationship for the agent



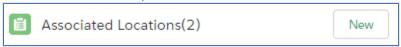
• Click Remove Relationship from the pop-up dialog box to confirm the selection. The page will refresh after the agent is removed.



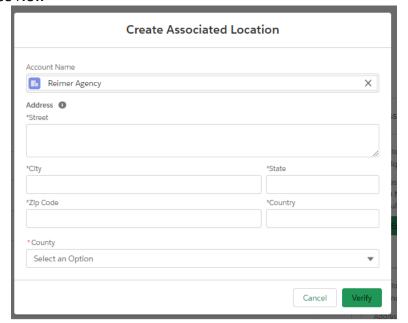
#### Add Location



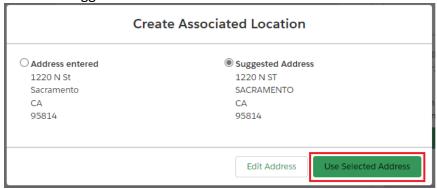
 Select Agency Profile → View Account and on the right side of the page, find Associated Locations placeholder.



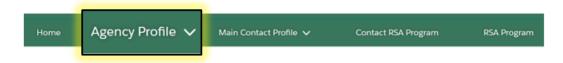
Choose New



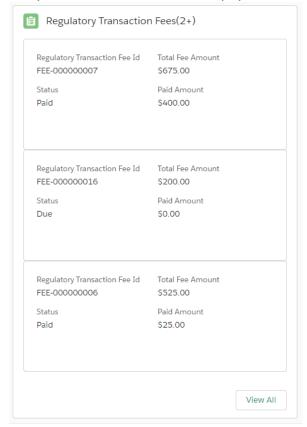
- o Complete the form including the location address and county.
- Select Verify
- Addresses entered are validated by the United States Postal Service (USPS). If there are misspellings or incorrect numbers, you will be presented with a suggested address. Correctly entered addresses will suggest an address that is in ALL CAPS. Proceed by selecting the radio dot for your entered address or the USPS suggested address and click Use Selected Address.



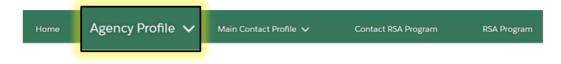
### View Payment Activity



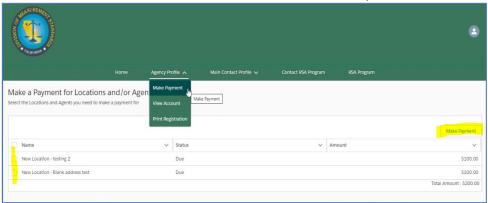
 ○ Click Agency Profile → View Account, scroll down and on the right side of the page, find Regulatory Transaction Fees to see all payment activities.



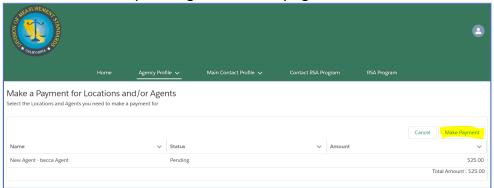
#### Make Payment



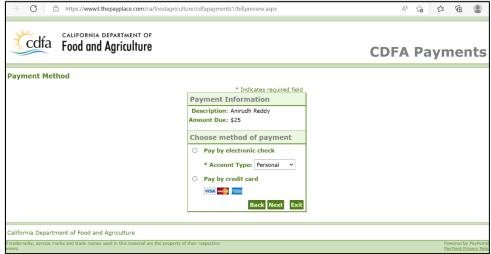
 Select Agency Profile → Make Payment to see any transactions listed, to make payment. Select associated transaction(s) by clicking individual check boxes or click the check box next to Name to select all, then click Make Payment.



Choose Make Payment again after verifying the transaction value.



Proceed with either electronic check or Credit Card and follow screens to complete payment.



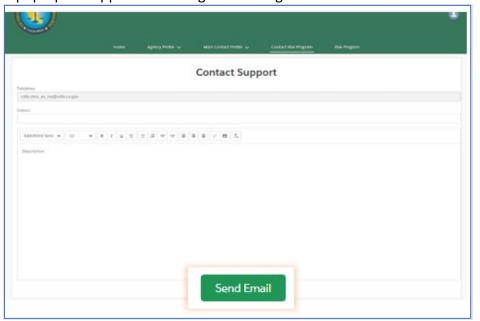
Following successful payment, you will receive an email confirmation and a message will appear – select Click To Continue to return to your agency information page.

Your Payment Processed successfully. Please Click To Continue.

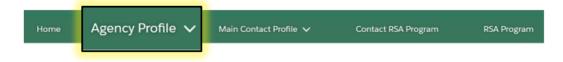
### **Contact RSA Program Staff**



- Click on Contact RSA Program to send an email to RSA Program for any questions or comments you may have.
- The To Address is auto populated with RSA Program mailbox.
- o Subject: Enter a relevant subject for this email.
- o Body: Provide a brief description for the purpose of this email.
- o Select Send Email button to send an email to RSA Program.
- A pop-up will appear indicating the message was sent.



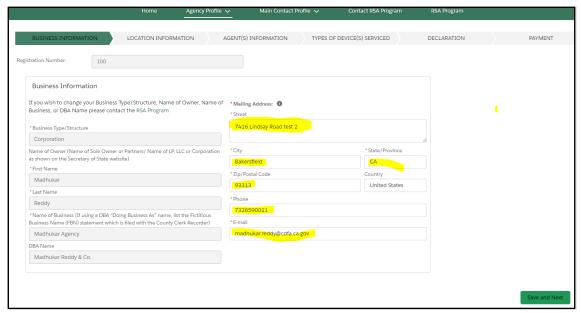
**Registration Renewal Submission** 



○ Select Agency Profile → Registration Renewal to start the Renewal form.

#### **Business Information section**

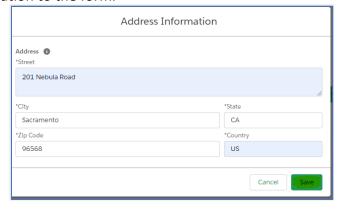
 You will have the option to update your mailing address, phone number, and e-mail address.

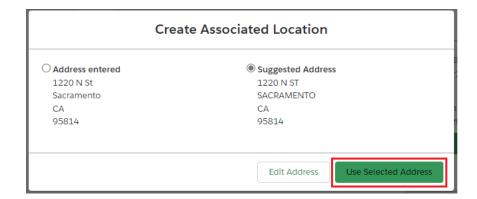


Select Save and Next.

#### Location Information Section

- Optionally you can Add, Delete, or change Primary location.
- To Add New Location.
  - Click New Address.
  - Give new address and click Verify. Addresses entered are validated by the United States Postal Service (USPS). If there are misspellings or incorrect numbers, you will be presented with a suggested address.
    Correctly entered addresses will suggest an address that is in ALL CAPS. Proceed by selecting the radio dot for your entered address or the USPS suggested address and click Use Selected Address to add the new location to the form.





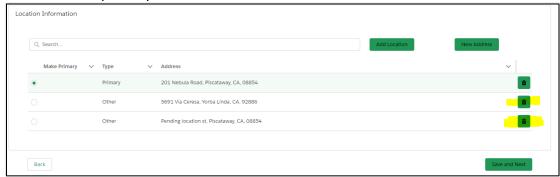
## **Change Primary location**

o Select radio dot under Make Primary.



#### To Delete Location

 Click on Trash bin icon on the same line as address. Note: Deleting Primary location is prohibited. You always need one primary location for renewal.

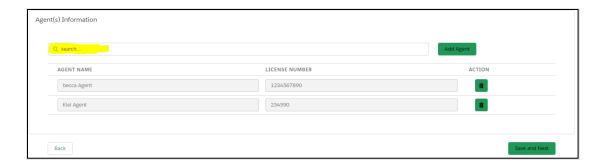


Click Save and Next.

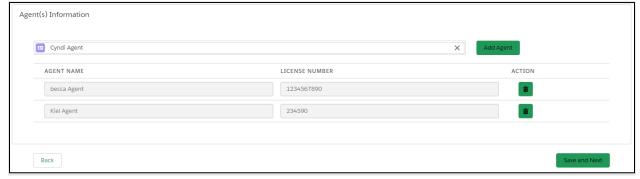
## Agent(s) Information Section

Add, Delete Agents.

o To Add Agent search with Agent name



Select Agent



- Click Add Agent
- To Delete Agent
- Click on Trash bin in the same row with Agent name.



Click Save and Next.

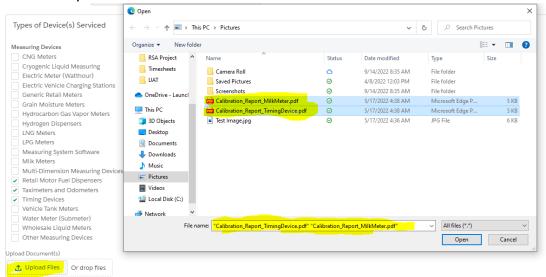
## • Types of Device(s) Serviced Section

- Select the devices that your Agency will service and upload all related calibration certificates.
- o To select or unselect, click on the check box next to device name.

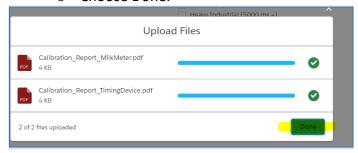


## Upload Standard Certifications/ Calibration reports

 Click Upload Files -> Select the Certification/ Report files from your device.



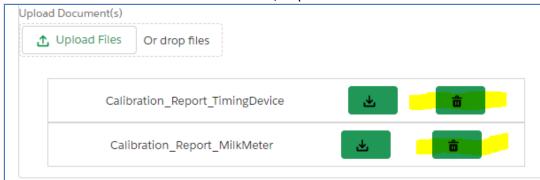
- Select Open after selecting the correct file.
- Choose Done.



Click Save and Next.

### • To Delete Uploaded Files

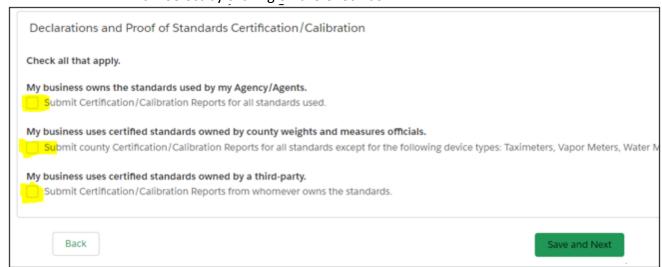
Click on Trash bin Icon on certification/ report file name



Click 'Save and Next'

Note: Renewal process could be delayed if you do not submit all the Standard certifications/ calibration reports of the devices included in the Renewal. Please include all certifications/calibrations reports related to the devices serviced.

- Declarations and Proof of Standards Certification/Calibration Section
  - Check all the apply
  - Select by clicking on the Check box



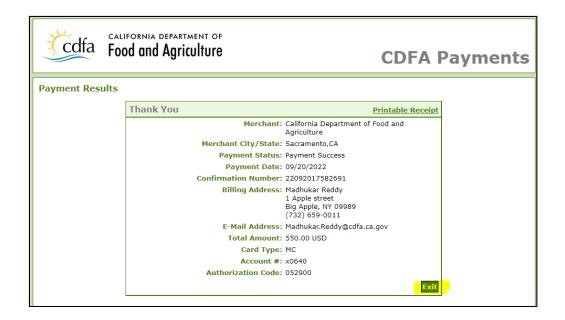
Click Save and Next.

- Fees and Payment Information Section
  - Review your payment
  - o Enter you first name and last name in the signature area.



- Select Make Payment.
- Proceed with either electronic check or credit card and follow screens to complete payment.





 Select Click To Continue on the next screen to return to the RSA Portal.

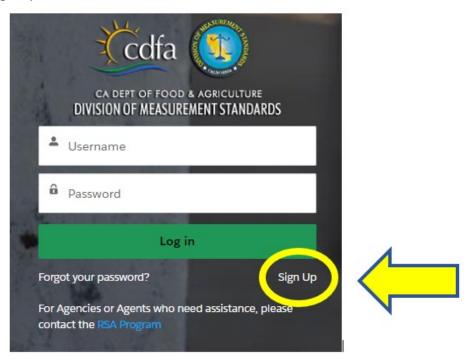
# Your Payment Processed successfully. Please <u>Click To Continue</u>.

 You have successfully submitted the Renewal. Email confirmations are sent for receipt of payment and RSA Renewal.
Renewal Process will now display a status of Pending Approval. DMS RSA Program staff will need time to review the submission before approving.

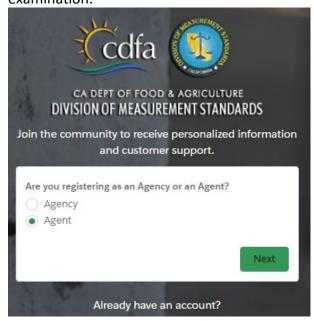


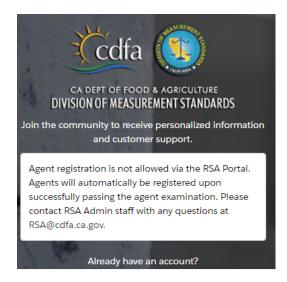
**NOTE**: Any updates you make to a registration during the renewal process will not be part of the renewal registration and will need to be submitted after the initial submission is processed.

- Sign Up as a New Agency https://www.cdfa.ca.gov/rsaportal
  - o Click Sign Up



NOTE: Agents are not permitted to directly sign up for Account access.
Agents will be manually entered upon successfully passing the agent examination.

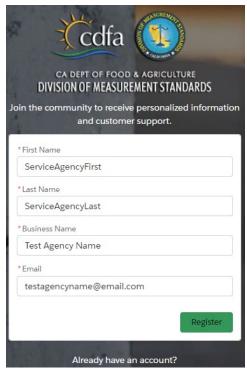




o When signing up as an Agency, select Agency and then click Next.



 Enter your First Name, Last Name, Business Name, and Agency Email address, then select Register. This email address will become your username.



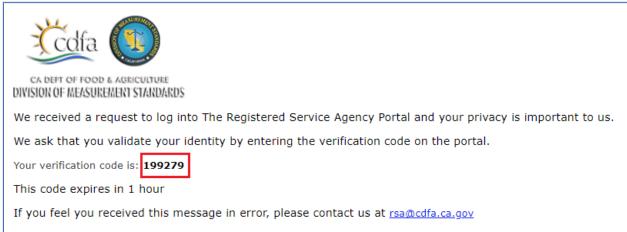
Registration information will be reviewed by RSA Program.

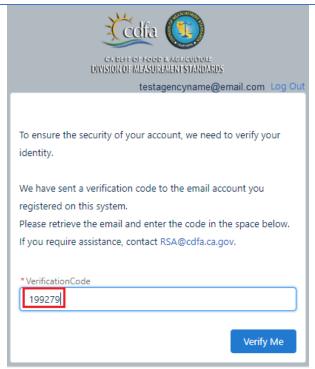


 Upon confirmation by RSA Program, an email will be automatically sent to the email address entered above. Click the RSA link in the email to set up your password and log in to the RSA system.

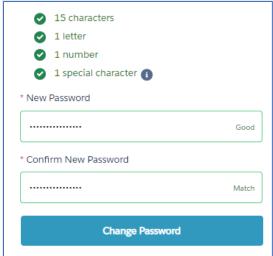


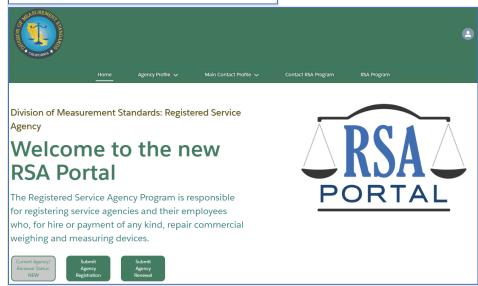
 The RSA system is safeguarded with multi-factor authentication. Upon the first and each subsequent login, you will be provided an email with verification code that must be used within 60 minutes. Check your email for the verification code, enter it into the Verification Code box, and click Verify Me.





 During this first log in, you must supply a password that meets the minimumsecurity requirements of 15 characters with 1 letter, 1 number, and 1 special character. As these are entered, you will see visual indication you've supplied a valid password, the password strength, and the password confirmation match. After completion, click Change Password to gain immediate access to the RSA Portal.

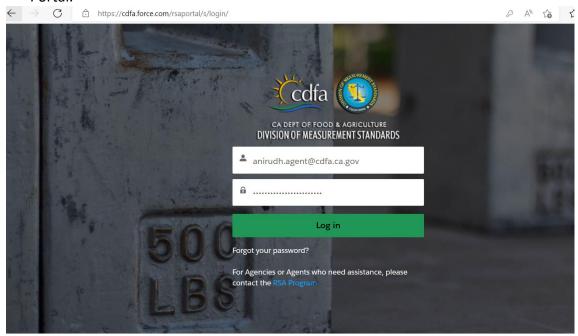




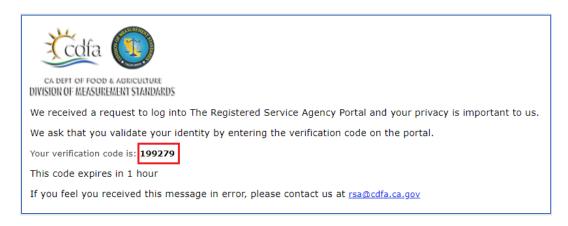
## **Agent Functions**

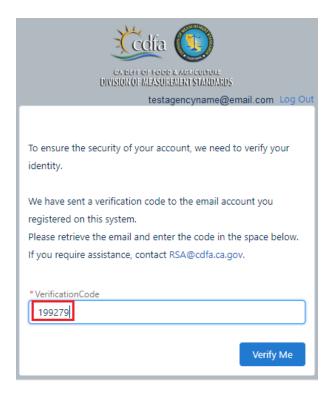
## • Login to Online Account

 Enter your Username and Password and click 'Log in' to login to the RSA Portal.



 The RSA system is safeguarded with multi-factor authentication. Upon clicking Log In, you will be provided an email with verification code that **must** be used within 60 minutes. Check your email for the verification code, enter it into the Verification Code box, and click Verify Me.





## Change Password

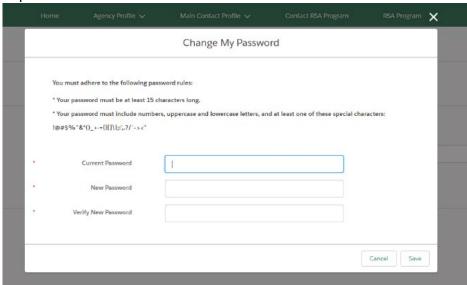
 On top right, select the User Profile Icon and My Settings to see change password options.



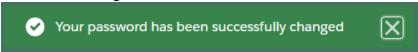
Select Change Password.



 Enter Current Password, New Password, and Verify New Password. Choose Save to save new password or cancel to proceed without changing your existing password.

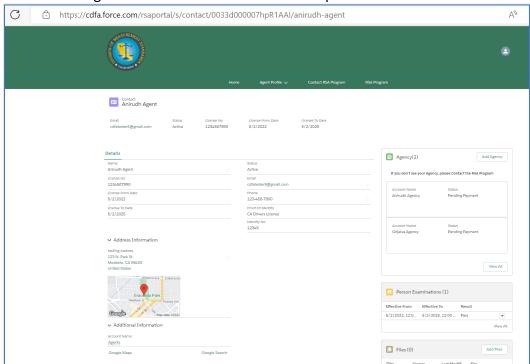


 Upon clicking Save, a dialog box will appear at the top of the page indicating a successful change.



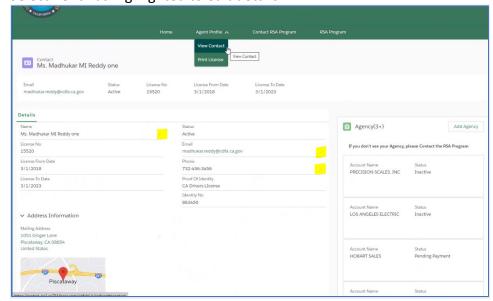
#### • View Personal Profile

○ Click Agent Profile → View Contact to see personal details.



#### Update Contact Information

- Select Agent Profile → View Contact to see your Name, Email, Phone, address, etc.
- Select Pencil as highlighted to edit details.



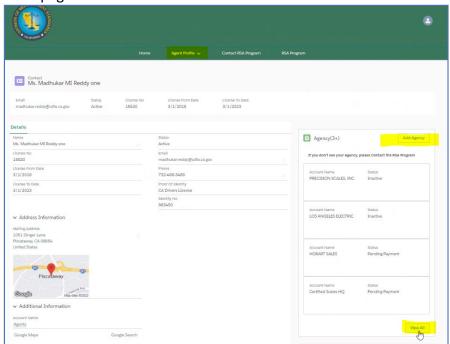
## • View/Print Updated License

 ○ Click Agent Profile dropdown → Click Print License to view and print the Service Agent License.



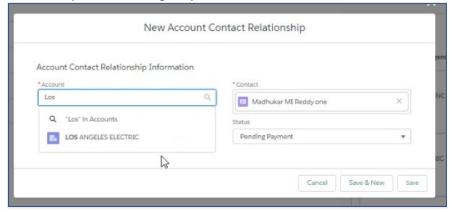
## Add/Delete Associated Agencies

 ○ Click Agent Profile → View Contact, find Agency placeholder on the right side of the page.

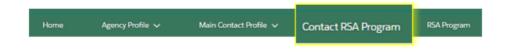


Click Add Agency to request association to an Agency.

 Type Agency name to find the Agency and click Save. This will automatically send a request to the Agency.



### **Contact RSA Program Staff**



- o Click on Contact RSA Program to send an email to RSA Program for any questions or comments you may have.
- o The To Address is auto populated with RSA Program mailbox RSA@CDFA.ca.gov
- o Subject: Enter a relevant subject for this email.
- Body: Provide a brief description for the purpose of this email.
- Select Send Email button to send an email to RSA Program.

