

How To Use the Customer Billing Portal

Introduction

The Department of Toxic Substances Control (DTSC) is pleased to announce the rollout of a new customer web-portal as part of our Cost Recovery Management System (CRMS). The initiative to have a customer portal was undertaken in response to requests for a convenient way to receive notifications of new invoices, view invoices and statements online, and make and confirm payments. Registering for a portal account will allow users to opt out of receiving paper invoices in the mail and view billing and account information online. To set up an account you will need an invoice or past statement on hand. This guide will walk you through how to:

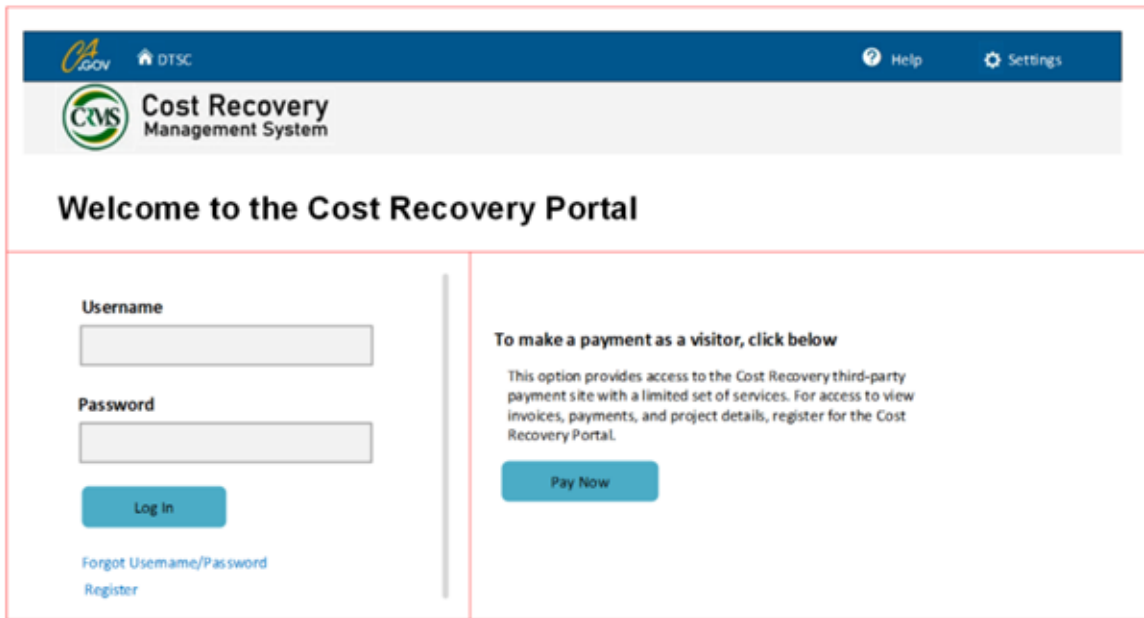
- Sign up to register for an account
- Sort and filter data
- Make a payment
- View account information
- View and update your profile (Request access to a project, change billing delivery preference and remove an associated project)
- View invoices, billing packages and disputes
- Submit a formal invoice dispute or view past formal disputes
- View payment information
- View the billable parties associated with a project

Sign Up

Signing up for CRMS access is a two-step process. Once you have created a CRMS account you must also request access to the projects you are involved with. To gain access the external party will need an invoice or billing statement to answer a security question. Upon completion of these steps, the system notifies DTSC to review the project access request. Once the request has been reviewed, a notification will be sent to the requestor. Have an invoice or past statement ready before you complete the following steps so you can sign up for access to your project(s). The Project Name and Code can be found at the top of your statement.

1. To begin, visit crms.dtsc.ca.gov and select **Register** from the portal log-in page (Figure 1).
2. Enter your account information. Once submitted, the **Request Project Access** (Figure 2) form will open. The system will ask if you want to add projects to your account.
3. To add one or more projects, select **Yes** and then press the **Continue** button. The second step of the form, **Add Project**, will open allowing you to enter associated projects (Figure 6). To add a project:
 - a. Enter the **Project Code** associated with the project. Refer to an invoice for the Project Code.
 - b. Next select the **Program Type**. This is the DTSC program that manages the project and can also be found on an invoice.
 - c. Next fill in the **Role on Project** field to indicate what your role is related to the project, **Billable Party** or **CC**. CC's receive copies of the statements that go out, while Billable Parties are responsible for making payments.

- d. Next enter the **Billable Party Name**. For this field, please use the billable party of the project (not the contact person of the billable party or the project name).
 - e. In the **Project Information Question**, chose which question to answer to verify your role, either: the project balance as of last invoice, or one of the last 3 invoice numbers.
 - f. In the **Answer** field, enter the answer to the question you chose.
4. When you are finished providing this information, press the **Save** button to submit the form.
 5. You may enter as many project associations as you need. Every project you add will need to be verified using the **Project Information Question** and reviewed by DTSC before access is granted.
 6. DTSC staff will then review your submission and grant access to the appropriate projects. Generally, you will receive a confirmation email within five business days.



Figure

1 — Users can **Register** for an account, **log in** to an existing account, **reset** their user credentials, or **make a payment as a guest**.

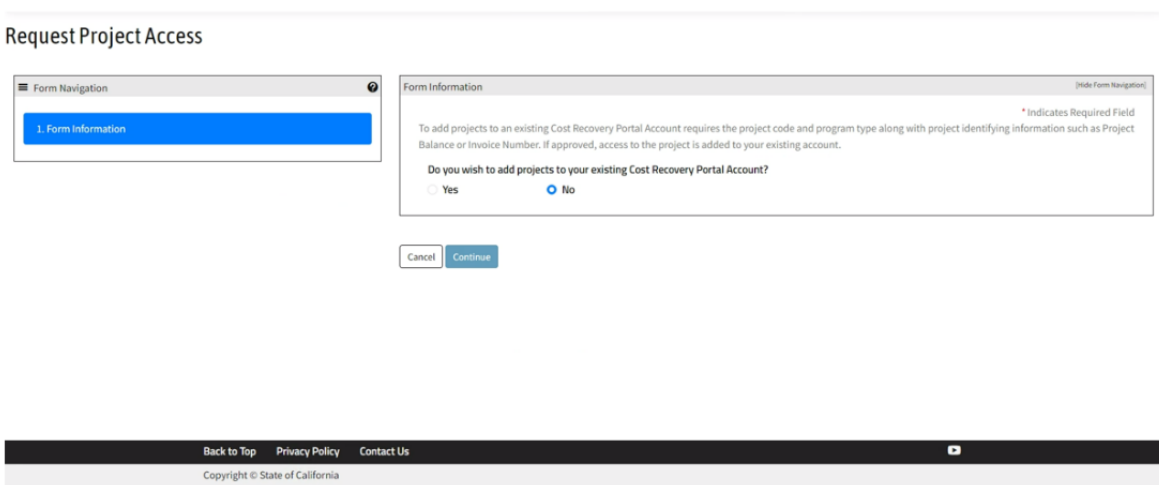


Figure 2 — After entering your account information, select “Yes” to add projects to your account.

Figure 3 — Fill out the Add Project form to request access to a project. You will need an invoice to complete this step.

Using Data Sorting and Filtering in CRMS

Pages are comprised of sections and grids (Figure 4). Grids include tools for sorting, filtering and exporting the presented information.

- Pressing the **Advanced Filtering** button will open a control bar allowing the user to filter data in individual columns as shown in Figure 5.
- The **Quick Search** locates pages by relevant predefined fields. This search is typically pre-set to the most frequently used search parameter for the individual page. For example, on the **Invoice** page the **Quick Search** is set to search by **Invoice #**.
- The **Export to Excel** button will download grid data as an Excel file.

Make a Payment

On-line payments are handled the same as before through a third-party payment processor using the Make a Payment Link. An account is not required. The CRMS Portal does allow users to view invoices, account balances and payments, as well as other details about their account.

The screenshot displays the Cost Recovery Management System interface. At the top, there is a navigation bar with the CA.GOV logo, a home icon, the text 'DTSC', a help icon, 'Welcome, Lyria Beck | Log Out', and a settings icon. Below this is a header for the 'Cost Recovery Management System' with navigation links for 'Overview', 'Invoices', 'Payments', 'Billable Parties', and 'Profile'. The main content area shows 'Project Code: 102002 SM' and 'Project Name: Testing Site' with a 'Change Project' link. A 'Make a Payment' button is visible on the right. The 'Invoices' section features an 'Account Balance: \$104,210.00' and a 'Dispute Invoice' button. A table of invoices is displayed with columns for Invoice #, Issue Date, Amount, Interest, Payments, Adjustments, Balance Due, Status, View Billing Package, and View Dispute. The table includes three rows of data and is equipped with 'Advanced Filtering', 'Export to Excel', and a search bar for 'Search on Invoice #'.

Account Balance: \$104,210.00

To request Timesheet Details, contact your Project Manager or Project Analyst. [Dispute Invoice](#)

Invoice #	Issue Date	Amount	Interest	Payments	Adjustments	Balance Due	Status	View Billing Package	View Dispute
F63873	01/02/2020	\$10,000	\$1,000	\$0.00	\$0.00	\$11,000	Active	View	
9823479	01/02/2019	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Cancelled	View	View
FR3425	01/02/2018	\$12,166.81	\$0.00	\$12,166.81	\$0.00	\$0.00	Active	View	

Figure 4 – Grids contain tools, such as Advanced Filtering, Export to Excel, and Search, to allow the user to sort, filter and download data from their account.

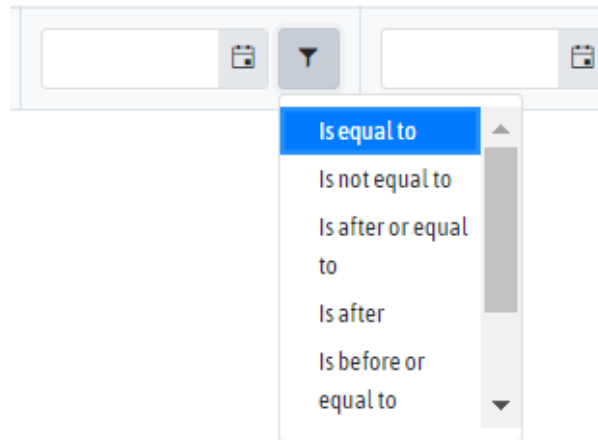


Figure 5 – Pressing the Advanced Filtering button opens a dropdown to select different filtering options.

Overview Page

After logging in, an account **Overview** page (Figure 6) shows project details. Tabs across the top provide continuous navigation between **Overview**, **Invoices**, **Payments**, **Billable Parties** and **Profile** pages.

- You can use the **Change Project** link (listed under the displayed **Project Code**) to select a different project if you already have been granted access to that project. See the **Profile** section below for details on how to request additional project access.
- At the bottom of the **Overview** page the **Latest Invoices Issued** section lists the **Issue Date** of the most recent invoices. Also displayed in the row is the **Invoice #**, **Amount**, **Balance**, and a **View** link in the **Billing Package** column.
- The **View** link will open the **Project Billings pop-up** (Figure 7) where individual invoice documents can be viewed. The **View All Invoices** link (listed under the **Latest Payments Received** section) will open the **Invoices** page for an expanded invoice search.

CA.GOV DTSC Help Welcome, Lyria Beck | Log Out Settings

Cost Recovery Management System Overview Invoices Payments Billable Parties Profile

You have been removed as a billable party from this project. Access to this project will be removed on mm/dd/yyyy.

Project Code: 102002 SM **Project Name:** Testing Site [Change Project](#) [Make a Payment](#)

Welcome, Lyria Beck

Please allow 5-7 business days for payments to be processed.

Project Overview

Account Balance: \$104,210.00
Account Balance may not reflect interest charges, which accrue daily.

Advance Balance: \$20,000.00
Advance Balance may not be available to apply to future charges per the project agreement.

Latest Payments Received

Date	Amount
04/12/2021	\$5,000.00
01/15/2021	\$4,000.00
11/12/2020	\$6,000.00

[View All Payments](#)

Latest Invoices Issued

Issue Date	Invoice #	Invoice Amount	Balance	Billing Package
04/12/2021	20SM0002	\$5,000.00	\$0.00	View
01/15/2021	20SM0001	\$4,000.00	\$0.00	View
11/12/2020	19SM0005	\$6,000.00	\$0.00	View

[View All Invoices](#)

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Figure 6 — Cost Recovery Account External Portal Overview Page

Project Billings

Document Title	Actions
Mailing Label	View
Billing Letter	View
Billing Package	View

[Close](#)

Figure 7 — View Billing Packages

Profile

The last tab is the **Profile** tab (Figure 8) used to manage CRMS account information.

- You can update your billing delivery preferences by pressing the **Change Billing Delivery Preference button**. Initially, the default for billing preference is USPS. The **Billing Delivery Preference pop-up** (Figure 9) will open for you to select your delivery preference (USPS or Electronic) for each associated project. Select **USPS** or **Electronic** for each displayed project, type your **Name** and the **Date**, and press the **Submit button**.

- You can request access to a project through the **Request Project Access** button which will initiate the **Add Project Pop-up**. The steps for adding a project are detailed in the **Sign Up** section of this document.
- An associated project can be removed in the **Project** section by using the **Remove** link located at the end of the project's grid row.
- **Portal Access Credentials** can be updated by selecting the **Update** button in that section.

Profile

Project Contact Information *

<Project Code>-<Program Type>

<Contact Name>
<Entity Name>
<Attention>
<Address Line 1>
<Address Line 2>
<City, State, Zip> <Country>

Portal Access Credentials

Email: Lyria@dtsc.ca.gov

Username: lbeck93smgh

Update

Projects

To remove a project from your account, select the Remove hyperlink. If a project is removed, you will need to request access to see project detail.

Project Code	Program Type	Billing Delivery Preference	Remove
100204	SM	USPS	Remove
100008	HW	Electronic	Remove
201831	SM	USPS	Remove

Figure 8 —Cost Recovery Account External Portal Profile

View Invoices, Billing Packages, and Disputes

Pressing the **Invoices** tab (Figure 10) will open the **Invoices** page where the user can **View** past invoices, **Dispute an Invoice** or **View past disputes**, and **View Billing Packages**. The **Account Balance** is displayed at the top of the **Invoices** section.

- In the **Invoice** section each invoice is displayed in a row that shows the **Invoice #**, **Issue Date**, **Amount**, **Interest**, **Payments**, **Adjustments**, **Balance Due**, and **Status**. The last two columns of the row have a link to the **Billing Package** and **Disputes** (if any).
- To **View a Billing Package**, press the **View** link in the selected invoice's row under the **View Billing Package** column.
- To **View a Dispute**, press the **View** link (if there is one) at the end of the selected invoice's row under the **View Dispute** column. This will open the **Disputes pop-up** (Figure 11) where you can select the dispute you wish to view.

Billing Delivery Preference

By selecting Electronic Notification, you are confirming that you will no longer receive paper invoices and all billing documents will be posted to your Cost Recovery Portal account. (You will not receive a paper or electronic bill, a bill will be posted to your account and you will be notified via email.)

Please select your billing delivery preference for each project listed.

Project	USPS	Electronic Notification
100002 SM – Aerojet	<input type="radio"/>	<input checked="" type="radio"/>
100812 SM – Maple Leave Int.	<input checked="" type="radio"/>	<input type="radio"/>
210602 SM – Georgia Mountains	<input checked="" type="radio"/>	<input type="radio"/>
433502 SM – Green Town	<input checked="" type="radio"/>	<input type="radio"/>

By checking this box and typing my name and today's date, I confirm that I intend to sign this electronic record. This process is intended to be in conformity with the California Civil Code section 1633.2 subdivision (h).

Figure 9 — Cost Recovery Account External Portal Billing Delivery Preferences

Account Balance: \$104,210.00

To request Timesheet Details, contact your Project Manager or Project Analyst. [Dispute Invoice](#)

Invoice #	Issue Date	Amount	Interest	Payments	Adjustments	Balance Due	Status	View Billing Package	View Dispute
F63873	01/02/2020	\$10,000	\$1,000	\$0.00	\$0.00	\$11,000	Active	View	
9823479	01/02/2019	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Cancelled	View	View
FR3425	01/02/2018	\$12,166.81	\$0.00	\$12,166.81	\$0.00	\$0.00	Active	View	

Figure 10 – The Invoices Tab displays project invoices and their statuses.

Dispute an Invoice (see the Billing Policy included with each invoice for guidelines for submitting former invoice disputes)

To enter a formal invoice dispute, select the **Dispute Invoice button**. This will open the **Display Invoices** pop-up (Figure 11) where you can select the invoice you wish to dispute and enter the pertinent information.

- Press the **Select radio button** next to the invoice you wish to dispute.
- Press the **Select button** at the bottom of the pop-up to continue to the **Dispute** input screen (Figure 12).
- The top portion of the **Dispute** input screen will be auto-populated with information from the invoiced account in question, including a **Dispute ID** and the associated **Project Code, Program Type, Billable Party, Invoice #** and **Invoice Date**.
- Select the **Dispute Type** dropdown and select from these choices: **Costs/Interest, Request for Timesheet Details, Legal Considerations, Other Billing Issues**.
- If the **Dispute Type** of **Cost/Interest** is selected, enter the **Date Payment Sent** and the **Payment Method (Check, CC, EFT, ACH)**.
- The Project Manager field will be displayed if the **Dispute Type** is **Costs/Interest or Request for Timesheet Details**.
- In the **Reason for Dispute** text field enter the details of your dispute.
- When finished, press the **Submit** button to enter your dispute into the system.
- If you wish to cancel, press the **Cancel** button and confirm cancellation.

Invoices

Disputes can only be filed on invoices issued in the last 45 days. Below are the invoices available to dispute. If an invoice is not listed, the timeframe for submitting a dispute has passed.

Select	Invoice #	Issue Date	Outstanding Balance
<input checked="" type="radio"/>	19SM3117	01/02/2020	\$150,301.98
<input type="radio"/>			
<input type="radio"/>			

Figure 11 – The Display Invoices pop-up allows you to submit a formal dispute to invoices issued in the last 45-days.

Disputes

* Indicates required field

If you have a dispute regarding the charges or related services appearing in the billing package you received from DTSC, including disputes regarding interest, you must notify DTSC of your dispute in writing within 45 calendar days from the date of the billing package. The invoice dispute notice must identify the name of the site or project, Site Code or Project Code, invoice number, invoice date, charges contested, employee name associated with contested charges, and the amount disputed. The invoice dispute notice also must include a detailed statement of the legal and/or factual basis for the dispute and the remedy sought. For timely and good faith invoice disputes submitted in accordance with this Statement of Cost Recovery Policies and Billing Procedures, DTSC will waive the imposition of interest until resolution of the dispute.

If you are disputing only a portion of the costs included in the invoice, you should pay for those costs that are not being disputed. Filing a dispute will not stay the imposition of the interest charges for undisputed costs.

Dispute ID: _____

Project Code: _____ Program Type: _____

Billable Party:

Invoice #: _____ Invoice Date: _____

Dispute Type ^{*}

Date the payment was sent: Payment Method: Project Manager: ^{*}

Enter a description of your dispute in the Reason for Dispute box.

Reason for Dispute ^{*}

2

3

Figure 12 – Dispute Input Screen

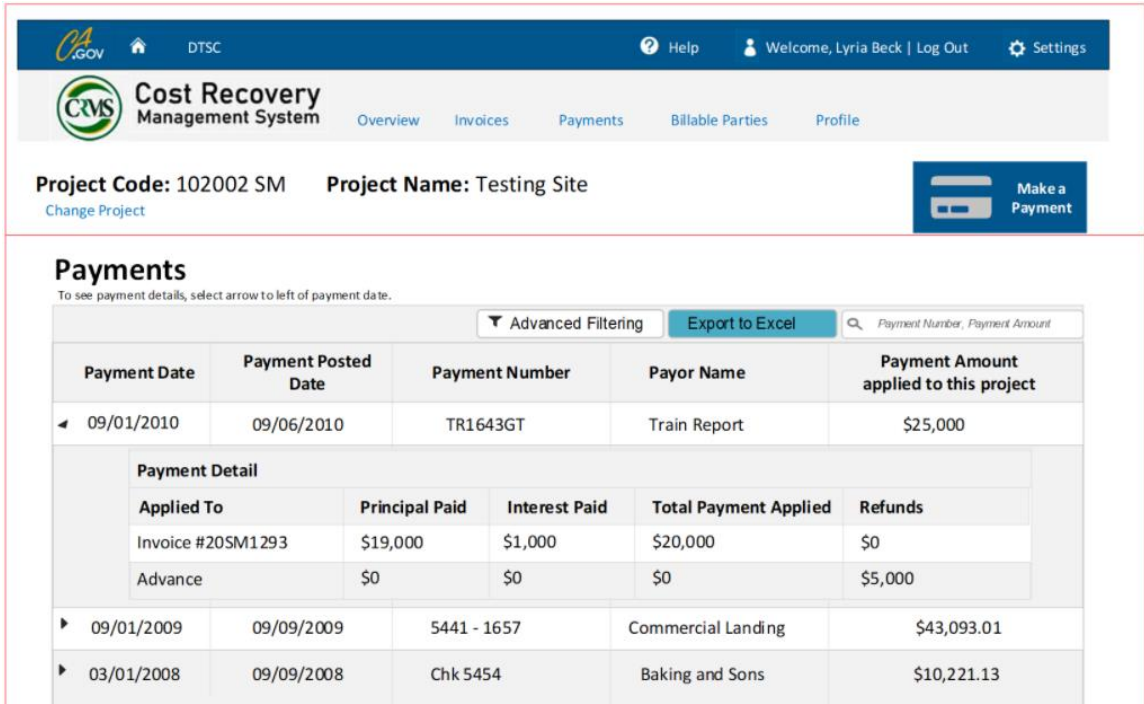


Figure 13 — Cost Recovery Account External Portal Payments

Billable Parties

The **Billable Parties** tab (Figure 14) shows all the **Billable Parties** on the project.

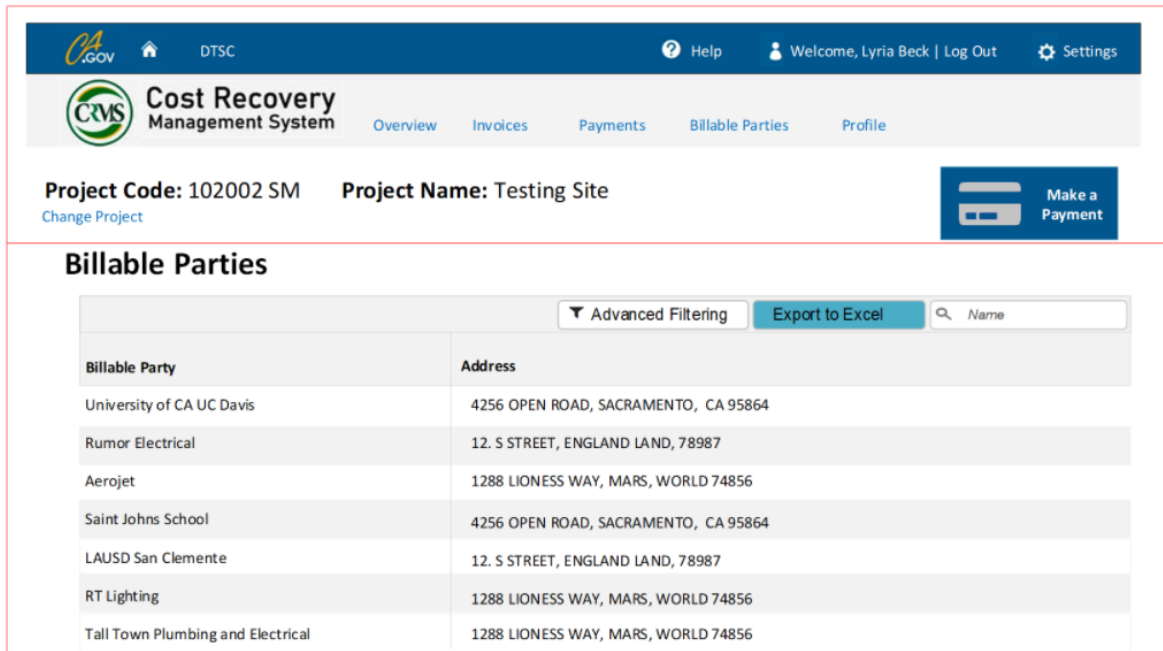


Figure 14 — Cost Recovery Account External Portal Billable Parties

Thank you for learning more about the Customer Billing Portal. Please contact billing@dtsc.ca.gov if you have any additional questions.