

Carpinteria Valley Water District's  
Cross Connection Control Program

# Tokay Web Test Guide



July 2018

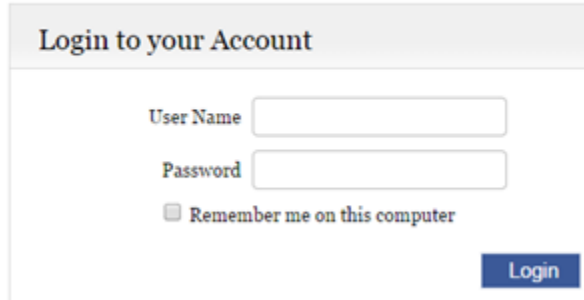
## Introduction

The Carpinteria Valley Water District is excited to introduce Web Test accessibility using the newest version of Tokay Software. The District's Cross Connection Control Program has been using Tokay for the last 10 years to update records and manage data regarding backflow assemblies and annual test compliance.

This guide was created to facilitate an easy transition to using the Web Test environment. If you have any questions or run into errors when navigating the online portal, you may contact our office by calling 805-684-2816.

# Web Test: How to Enter a Test

Entering your test results on the web will save you time. You will be able to print a clean, professional completed test report for your customer. There will be a short and almost painless learning curve.



Login to your Account

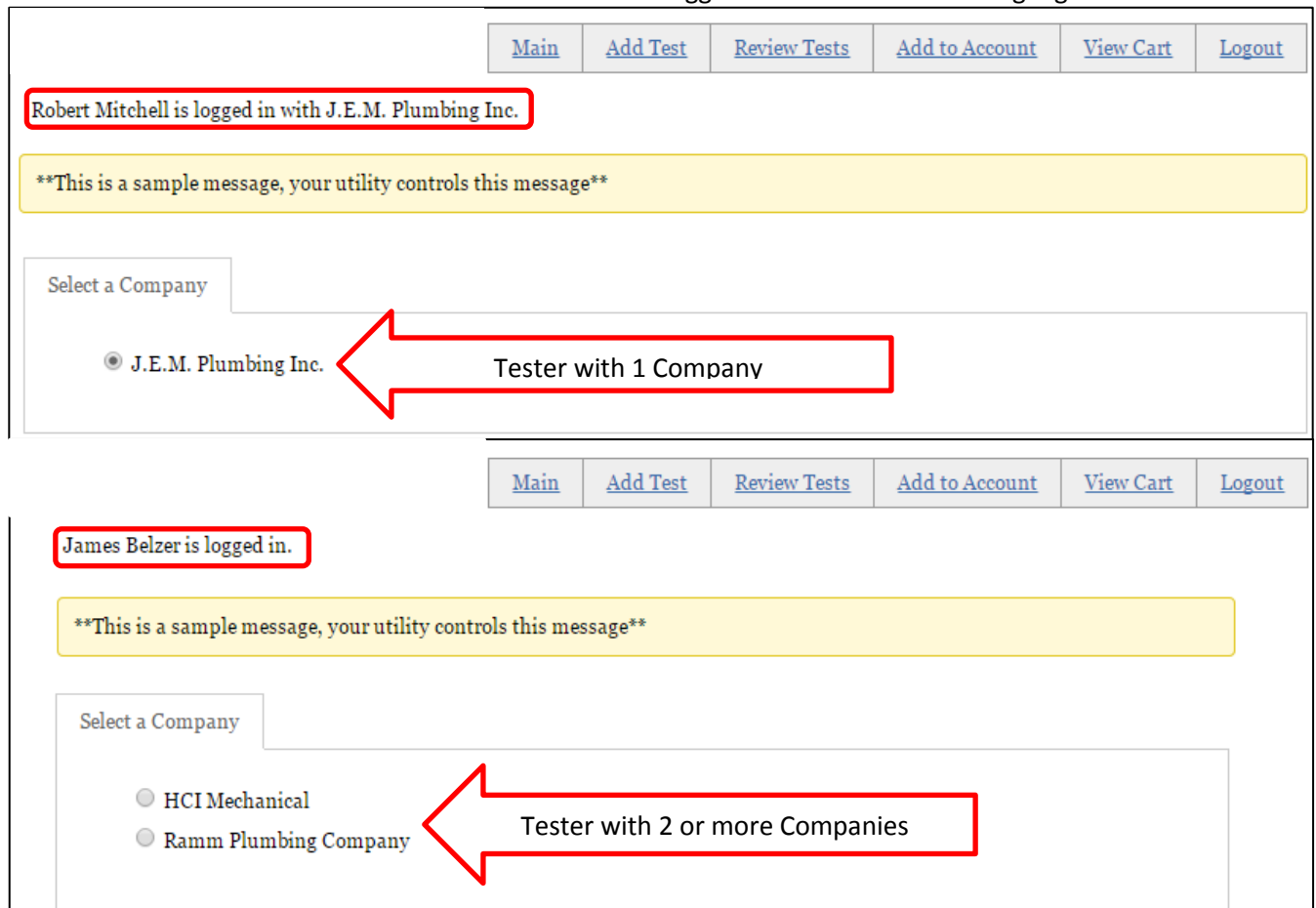
User Name

Password

Remember me on this computer

Login

- ❖ Enter your 'user name' and 'password' to login to the web test entry site. User names and passwords are issues by the utility.
- ❖ If you are working for more than one company the **Main** screen will reflect this and include all company names allowing you to select the appropriate company.
  - Your name along with the company's name will appear at the top of the page.
  - If you work for more than 1 company, once you selected the company's name you selected will appear at the top of the page followed by [click to change](#)
    - ↳ This link allows you to change which company you are logged in under without having logout and then back in.



Main Add Test Review Tests Add to Account View Cart Logout

Robert Mitchell is logged in with J.E.M. Plumbing Inc.

\*\*This is a sample message, your utility controls this message\*\*

Select a Company

J.E.M. Plumbing Inc. Tester with 1 Company

Main Add Test Review Tests Add to Account View Cart Logout

James Belzer is logged in.

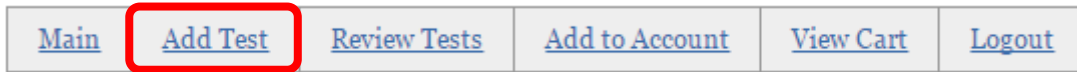
\*\*This is a sample message, your utility controls this message\*\*

Select a Company

HCI Mechanical

Ramm Plumbing Company Tester with 2 or more Companies

- ❖ To enter test results, first you need to find the correct backflow assembly via the *Device Profile Search* screen, by clicking the **Add Test** button located in the top toolbar.



- ❖ To find the backflow assembly enter the **Serial #** and the **House/Building #** **-OR-** the **Hazard #** \* (\*utility provides #)



George Bigler is logged in.

**\*\*This is a sample message, your utility controls this message\*\***

**Device Profile Search**

\* Indicates Required Field

\* Serial Number

\* House/Building Number

**OR**

\* Hazard #

**Locate Device** or [Clear Form](#)

- ❖ Whether you search by **Serial #** and the **House/Building #** **-OR-** the **Hazard #**, once you click the **Locate Device** button, the *Verify Site Profile* screen appears;
- ❖ Notice the Last Test Date and Time are displayed at the top-middle of the *Verify Site Profile* screen

**Verify Site Profile**

This is Correct  
  Make Changes  
 Last Test Date: 1/27/2009 12:00:00 AM  
  Existing Device  
  Replace Device

Address

Customer

Location

Hazard

Meter Number       Model

Serial Number       Type

Manufacturer       Size

**Confirm and Enter Results** or [Cancel](#)

❖ The *Verify Site Profile* screen allows you to verify or make changes to the site and/or device data. If no changes are necessary, click the **Confirm and Enter Results** button at the bottom of the screen.

- If the Assembly information is different than what appears on the screen, select **'Make Changes'** at the top left-hand side of the *Verify Site Profile* screen to edit
  - ↳ Notice, all fields are no longer grayed out, allowing the you to edit the information

The screenshot shows the 'Verify Site Profile' screen. At the top, there are radio buttons for 'This is Correct', 'Make Changes' (which is selected and highlighted with a red box), 'Existing Device', and 'Replace Device'. The 'Last Test Date' is 8/26/2014 12:00:00 AM. Below the radio buttons, there are several input fields: Address (1122 S Main St), Customer (West Suburban Bank), Location (Mech room), Hazard (Boiler And/or Heating Feed), Meter Number (46280048), Model (975XL), Serial Number (W368389), Type (RP), and Manufacturer (WILKINS). At the bottom, there is a green button labeled 'Confirm and Enter Results' and a blue link labeled 'Cancel'.

- If you have tested an assembly that has replaced the assembly on the screen, select **'Replace Device'** at the top right-hand side of the *Verify Site Profile* screen to edit
  - ↳ Notice, the bottom (device) fields, excluding the Meter #, are no longer grayed out, allowing you to edit the information.

The screenshot shows the 'Verify Site Profile' screen. At the top, there are radio buttons for 'This is Correct', 'Make Changes', 'Existing Device', and 'Replace Device' (which is selected and highlighted with a red box). The 'Last Test Date' is 8/26/2014 12:00:00 AM. Below the radio buttons, there are several input fields: Address (1122 S Main St), Customer (West Suburban Bank), Location (Mech room), Hazard (Boiler And/or Heating Feed), Meter Number (46280048), Model (empty), Serial Number (empty), Type (empty), and Manufacturer (empty). At the bottom, there is a green button labeled 'Confirm and Enter Results' and a blue link labeled 'Cancel'.

\*\*\* This updated information is both valuable and appreciated by the utility \*\*\*

❖ Once any necessary changes have been made click the **Confirm and Enter Results** button to proceed to the *Test Data Entry* screen.

- ❖ Based off the **Serial #** and the **House/Building #** -OR- the **Hazard #** you searched for, the appropriate **'Device Type'** *Test Data Entry* screen will appear.
  - In the top row of the *Test Data Entry* screen the **'Device Type'** code will appear; **PB, DC** or **PVB/SVB**. See examples of each screen below and on pages 5 & 6.

**Example of Device Type: RP**

[Main](#) | [Add Test](#) | [Review Tests](#) | [Add to Account](#) | [View Cart](#) | [Logout](#)

SELIN ROLLAN is logged in.

**\*\*This is a sample message, your utility controls this message\*\***

Test Data Entry					
Serial Number: W368389 <span style="border: 2px solid red; padding: 2px;">Device Type: RP</span> Address: 1122 S Main St - Mech room					
Initial Test	Check Valve #1	Check Valve #2	Relief Valve		
<input type="radio"/> Pass <input type="radio"/> Fail Date <input style="width: 100%;" type="text"/> <small>Please input in MM/DD/YYYY format.</small>	<input type="radio"/> Leaked <input type="radio"/> Closed Tight Held at <input style="width: 40px;" type="text"/> PSID	<input type="radio"/> Leaked <input type="radio"/> Closed Tight Held at <input style="width: 40px;" type="text"/> PSID	Did not Open <input type="checkbox"/> Opened at <input style="width: 40px;" type="text"/> PSID		
Repaired	Enter Repair Details for Specific Assemblies Below				
Date <input style="width: 100%;" type="text"/>	<input type="checkbox"/> Cleaned <input type="checkbox"/> Rubber Kit <input type="checkbox"/> Rebuild Comments: <input style="width: 100%;" type="text"/>				
Final Test	Check Valve #1	Check Valve #2	Relief Valve		
Pass <input type="checkbox"/> Date <input style="width: 100%;" type="text"/>	Closed Tight <input type="checkbox"/> Held at <input style="width: 40px;" type="text"/> PSID	Closed Tight <input type="checkbox"/> Held at <input style="width: 40px;" type="text"/> PSID	Opened at <input style="width: 40px;" type="text"/> PSID		
Details					
Proper Install <input type="radio"/> Yes <input type="radio"/> No	#2 Shutoff <input type="radio"/> Leaked <input type="radio"/> Closed Tight	Service Restored <input type="radio"/> Yes <input type="radio"/> No	RV Exercised <input type="radio"/> Yes <input type="radio"/> No	Held Backpressure <input type="radio"/> Yes <input type="radio"/> No	Line PSI <input style="width: 40px;" type="text"/> Meter Reading <input style="width: 40px;" type="text"/>
Test Kit	Comments				
07071565 ▾	<input style="width: 100%;" type="text"/>				
<input type="checkbox"/> * The above information is certified to be true and accurate to the best of my knowledge. <input type="checkbox"/> * The assembly is installed in accordance with manufacturer's recommendations and/or state and local codes.					
<span style="background-color: green; color: white; padding: 2px 10px;">Save Test Data</span> or <a href="#">Cancel</a>					

**\*\*\*These are sample messages, your utility controls the content and quantity of these messages\*\*\***

- ❖ If you do not fill in all the required fields a warning message associated with the missed field will appear on the screen. You will not be able to save the test data until all required fields are filled-in and boxes are checked.

Example of Device Type: DC

[Main](#) | [Add Test](#) | [Review Tests](#) | [Add to Account](#) | [View Cart](#) | [Logout](#)

SELIN ROLLAN is logged in.

**\*\*This is a sample message, your utility controls this message\*\***

Test Data Entry

Serial Number: 0003372 **Device Type: DC** Address: 1000 W Oak Creek Dr - Sprinkler Room

Initial Test

Pass  Fail

Date

Please input in MM/DD/YYYY format.

Check Valve #1

Leaked  
 Closed Tight

Held at  PSID

Check Valve #2

Leaked  
 Closed Tight

Held at  PSID

Repaired

Enter Repair Details for Specific Assemblies Below

Date

Cleaned  
 Rubber Kit  
 Rebuild

Comments:

Final Test

Pass

Date

Check Valve #1

Closed Tight

Held at  PSID

Check Valve #2

Closed Tight

Held at  PSID

Details

Proper Install

Yes  
 No

#2 Shutoff

Leaked  
 Closed Tight

Service Restored

Yes  
 No

Held Backpressure

Yes  
 No

Line PSI

Meter Reading

Test Kit

07071565 ▾

Comments

\* The above information is certified to be true and accurate to the best of my knowledge.

\* The assembly is installed in accordance with manufacturer's recommendations and/or state and local codes.

**Save Test Data** or [Cancel](#)

**\*\*\*These are sample messages, your utility controls the content and quantity of these messages\*\*\***

- ❖ If you do not fill in all the required fields a warning message associated with the missed field will appear on the screen. You will not be able to save the test data until all required fields are filled-in and boxes are checked.

Example of Device Type: PVB/SVB

[Main](#) | [Add Test](#) | [Review Tests](#) | [Add to Account](#) | [View Cart](#) | [Logout](#)

SELIN ROLLAN is logged in.

**\*\*This is a sample message, your utility controls this message\*\***

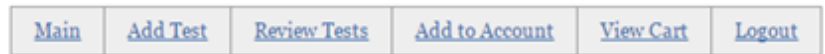
Test Data Entry				
Serial Number: 255245 <b>Device Type: PVB</b> Address: 130 S McKinley -				
<b>Initial Test</b>		<b>PVB/SVB</b>		
<input type="radio"/> Pass <input type="radio"/> Fail		<b>Air Inlet</b>	<b>Check Valve</b>	
Date <input type="text"/>		<input type="checkbox"/> Did Not Open	Leaked <input type="checkbox"/>	
Please input in MM/DD/YYYY format.		Opened at <input type="text"/> PSID	Held at <input type="text"/> PSID	
<input type="checkbox"/> Opened Fully				
<b>Repaired</b>	<b>Enter Repair Details for Specific Assemblies Below</b>			
Date <input type="text"/>	<input type="checkbox"/> Cleaned			
	<input type="checkbox"/> Rubber Kit			
	<input type="checkbox"/> Rebuild			
	Comments: <input type="text"/>			
<b>Final Test</b>		<b>PVB/SVB</b>		
<input type="checkbox"/> Pass		<b>Air Inlet</b>	<b>Check Valve</b>	
Date <input type="text"/>		Opened Fully <input type="checkbox"/>	Held at <input type="text"/> PSID	
		Opened at <input type="text"/> PSID		
<b>Details</b>				
Proper Install	#2 Shutoff	Service Restored	Held Backpressure	Line PSI <input type="text"/>
<input type="radio"/> Yes	<input type="radio"/> Leaked	<input type="radio"/> Yes	<input type="radio"/> Yes	Meter Reading <input type="text"/>
<input type="radio"/> No	<input type="radio"/> Closed Tight	<input type="radio"/> No	<input type="radio"/> No	
<b>Test Kit</b>	<b>Comments</b>			
07071565 ▾	<input type="text"/>			
<input type="checkbox"/> * The above information is certified to be true and accurate to the best of my knowledge.				
<input type="checkbox"/> * The assembly is installed in accordance with manufacturer's recommendations and/or state and local codes.				
<b>Save Test Data</b> or <a href="#">Cancel</a>				

**\*\*\*These are sample messages, your utility controls the content and quantity of these messages\*\*\***

- ❖ If you do not fill in all the required fields a warning message associated with the missed field will appear on the screen. You will not be able to save the test data until all required fields are filled-in and boxes are checked.



- ❖ Once all required fields have been filled-in and all required boxes checked, click **Save Test Data** to proceed to the **Review Tests** screen – here the completed submitted tests are held until you are ready to submit to the utility.
  - If you forget to click **Save Test Data** or you click [Cancel](#), all the data will be deleted and lost.
  - If you wish to enter another test before proceeding to your **Review Tests** screen, click ‘**Add Test**’ located in the top toolbar, repeating the previous steps until complete.



Robert Mitchell is logged in with J.E.M. Plumbing Inc.

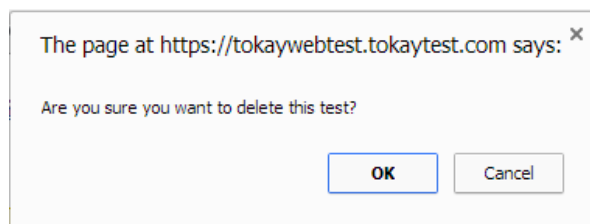
**\*\*This is a sample message, your utility controls this message\*\* Test 2**

Unsubmitted		Paid For						
Submit	Serial#	Company	Address	Initial Test	Final Test	Test Kit	Fee	
<input type="checkbox"/>	W368389	J.E.M. Plumbing Inc.	1122 S Main St - Mech room	10/30/2014 pass		0032990	\$1.00	
<input type="checkbox"/>	0003372	J.E.M. Plumbing Inc.	1000 W Oak Creek Dr - Sprinkler Room	10/30/2014 pass		0032990	\$1.00	

- ❖ Once complete, all saved un-submitted tests will appear on the **Review Tests** screen under the Un-submitted tab.
- ❖ From this screen you can go back to the *Test Data Entry* screen to edit or delete a saved test. You can also Submit or Print Test Report the saved tests.

Submit	Serial#	Company	Address	Initial Test	Final Test	Test Kit	Fee
<input type="checkbox"/>	W368389	ROLLAN PLUMBING, INC	1122 S Main St - Mech room	9/17/2014 fail	9/18/2014 pass	07071565	\$1.00
<input type="checkbox"/>	0003372	ROLLAN PLUMBING, INC	1000 W Oak Creek Dr - Sprinkler Room	9/17/2014 fail		07071565	\$1.00
<input type="checkbox"/>	255245	ROLLAN PLUMBING, INC	130 S McKinley -	9/9/2014 fail	9/17/2014 pass	07071565	\$1.00

- **To edit a saved test**, click the [Serial #](#) associated with that test, ex: [W368389](#). This will bring you back to the *Test Data Entry* screen where you can edit the information, then click **Save Test Data** to return to the *Review Tests* screen with the corrected data saved.
- **To delete a saved test**, click the [Serial #](#) associated with that test, ex: [0003372](#). This will bring you back to the *Test Data Entry* screen instead of editing the data you will click the **Delete Test** button in the top right-hand corner of the screen.
  - ↳ A warning message ‘Are you sure you want to delete this test?’ will appear, click OK to delete the test or Cancel to return to the *Test Data Entry* screen.



- Once a test is deleted, only the un-submitted tests still appear on the **Review Test** screen.

Submit	Serial#	Company	Address	Initial Test	Final Test	Test Kit	Fee
<input type="checkbox"/>	W368389	ROLLAN PLUMBING, INC	1122 S Main St - Mech room	9/17/2014 fail	9/18/2014 pass	07071565	\$1.00
<input type="checkbox"/>	255245	ROLLAN PLUMBING, INC	130 S McKinley -	9/9/2014 fail	9/17/2014 pass	07071565	\$1.00

- To submit a test to the utility, check the box of the test to be submitted then click **Submit Tests**

Unsubmitted      Paid For

Submit	Serial#	Company	Address	Initial Test	Final Test	Test Kit	Fee
<input checked="" type="checkbox"/>	255245	ROLLAN PLUMBING, INC	130 S McKinley -	9/17/2014 pass		07071565	\$1.00
<input type="checkbox"/>	255245	ROLLAN PLUMBING, INC	130 S McKinley -	9/17/2014 pass		07071565	\$1.00

**Submit Tests**      **Print Test Report**

- When you click the **Submit Tests** button, you are directed to the *Shopping Cart* screen. From here you can **Proceed to Checkout** (this will be explained in further detail starting on Page 9).

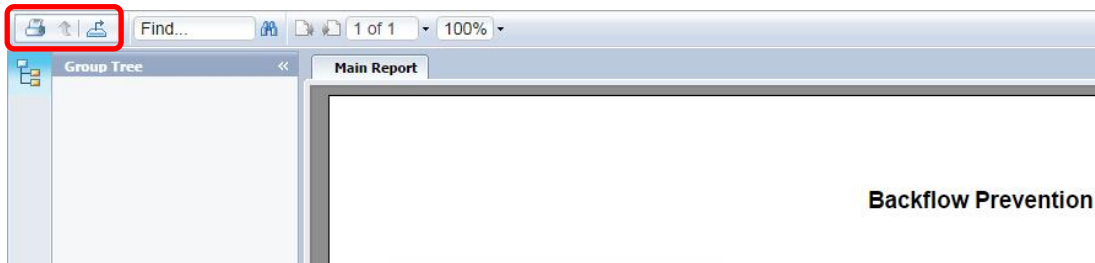
- Going back to the **Review Tests** screen. You will see the option to print a test report (before submitting). To do this, check the box of the associated record and then click **Print Test Report**
  - This allows you to print a copy of the test report before it is submitted for your records

Unsubmitted      Paid For

Submit	Serial#	Company	Address	Initial Test	Final Test	Test Kit	Fee
<input type="checkbox"/>	255245	ROLLAN PLUMBING, INC	130 S McKinley -	9/17/2014 pass		07071565	\$1.00
<input checked="" type="checkbox"/>	255245	ROLLAN PLUMBING, INC	130 S McKinley -	9/17/2014 pass		07071565	\$1.00

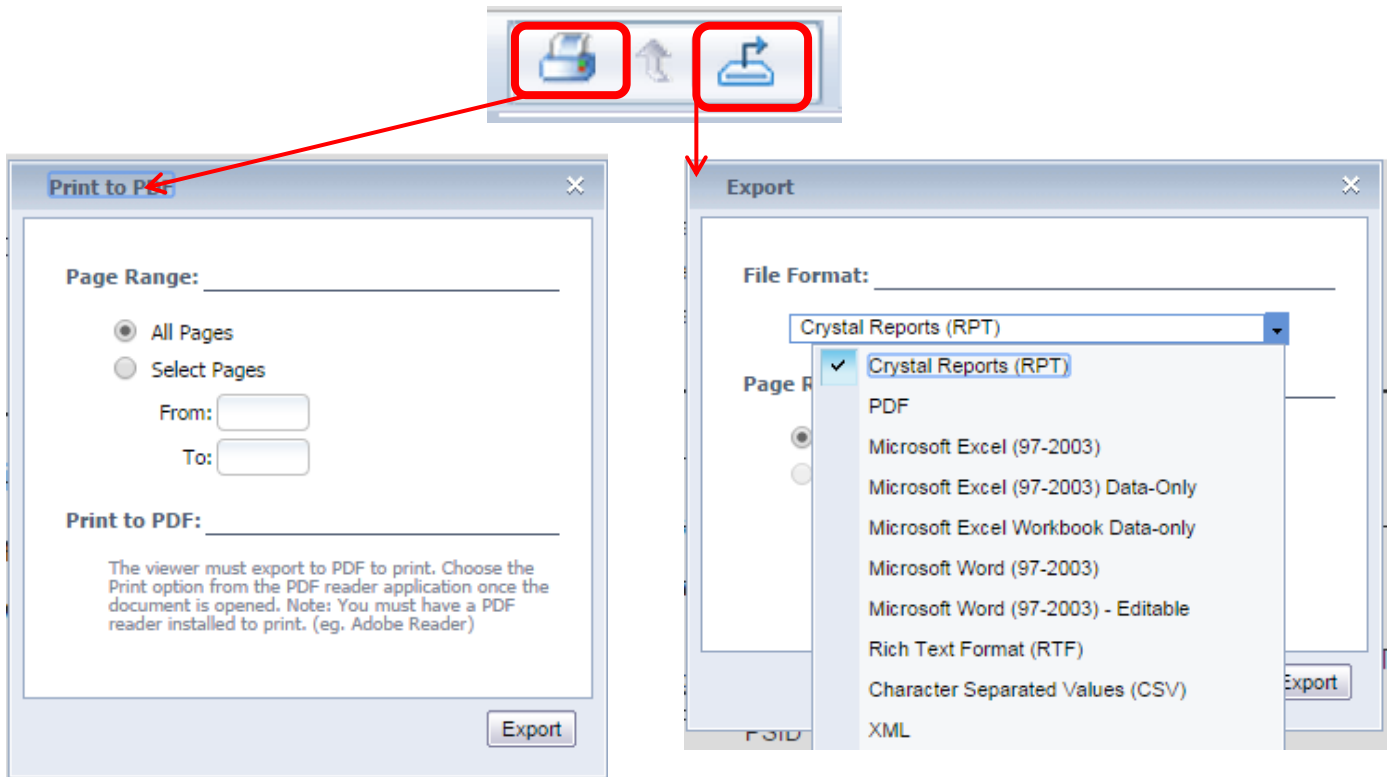
**Submit Tests**      **Print Test Report**

- When you click the **Print Test Report** button, the print preview screen will appear. To be able to print the document, you must first export the document into a PDF or another application.



- In the far top left-hand corner of the screen, there are 2 options to allow you to export the report so you can print
  - The printer icon on the left exports the document into a PDF allowing you to then print
  - The arrow icon on the right allows you to select which program to export the document into using the drop-down menu, which will then allow you to print.





- ❖ No matter which option you choose, once ready, click the **Export** button at the bottom right of the window.
  - The test report will export to a PDF or the selected program and appear in the bottom toolbar of the screen (or in your Downloads folder) allowing you to open, save and print the exported document.
- ❖ Now, going back to explain in further detail what to do when you click the **Submit Tests** button and are directed to the *Shopping Cart* screen.
  - Here you can return to the *Test Data Entry* screen by clicking on the [Serial #](#), remove the submitted test from the Shopping Cart by clicking [Remove](#) or [Proceed to Checkout](#)

Shopping Cart

[Return to Test Data Summary](#)

Serial#	Address	Price	Remove
<a href="#">66504X</a>	8888 SW 136TH ST - Back of Mall next to Macys receiving doors	\$0.49	<a href="#">Remove</a>
		Subtotal:	\$0.49
		<b>Total Due:</b>	<b>\$0.49</b>

[Proceed to Checkout](#)

- If you return to the *Test Data Entry* screen, follow the steps from earlier explaining how to edit an un-submitted test (on page 7)
- If you choose to [Remove](#) the submitted test from your *Shopping Cart*, it will be returned to the *Review Tests* screen and will appear under the un-submitted tab.

- ❖ If everything is ok with the items in your *Shopping Cart*, you can click **Proceed to Checkout** to advance to the *Checkout* screen where you can complete the test report submission.

- ❖ At this time you need to add a method of payment to your \*profile. You have two options as to how your test fee payments will be charged to your credit card, either on a per-test basis or deducted from your “account”. The most economical is to have tests deducted from your account. Tests submitted individually or in groups of less than five at a time, will be charged a service fee of 50 cents per test.

**\*The information you enter will be stored in your profile and available future use.**

**Service Fee:** If you submit **less than five tests per transaction**, a service charge of 50 cents will be applied to each test. For example: if you submit 3 tests (with a fee of \$1.00 each) your credit card will be charged \$4.50 (\$1.00 per test plus a 50 cent service fee per test). Transactions of 5 tests or more will not be charged a service fee. The easiest method of payment is to ‘Establish an Account’ - see the details below.

Click **‘Add a Payment Method’** and follow the steps below on how to add a method of payment.

- To add a payment method, click on the button **‘Add a Payment Method’**.
  1. Credit Card Payment at time of submittal: Enter a debit or credit card and the billing information then click **‘Save’** to return to the *Checkout* screen. To return to the *Checkout* screen without saving or adding any card information, click Cancel.

- The last 4 digits of the newly added card will now appear on the *Checkout* screen, to be used to complete the transaction.

2. Create a Credit Card Account: Establishing an “account” and preloading the “account” means your credit card to be charged the dollar amount you select. The test fees can be deducted from the “account” moving forward. Example: if you add \$100.00 to your “account” than your credit card is only charged the \$100.00 at that time and the individual test fee’s will be deducted from the established “account” leaving you with a remaining balance which can be added to at any time.
- The system does allow for more than one card to be stored in your profile. Just be sure the correct one is selected before you click **Complete Checkout**.

Notice the one ending in 5875 is selected, which means when you press **Complete Checkout** the card ending in 5875 will be charged

- ❖ You can also Edit the card information by clicking the **Edit** button next to that card number.

- ❖ Any card stored in your profile can be deleted from the *Checkout* screen
  - First, select the card number you wish to delete and click the **‘Delete Selected Payment Method’** button.

\*\*\*Please Note: At this time there is no warning message when deleting a card stored in your profile. If a card is deleted in error, follow the previous steps to **‘Add a Payment Method’** and re-enter the card information.\*\*\*

Notice the one ending in 2398 is selected, which means when you press the **‘Delete Selected Payment Method’** button the card ending in 2398 will immediately be deleted without a warning message

- ❖ Once the necessary card information has been saved, enter your email address in the **Receipt Email Address** field on the *Checkout* screen and click the **Complete Checkout** button.

- If you forget to enter your email address on the *Checkout* screen you have the option to print a copy of the receipt from the *Checkout Receipt* screen by clicking the **Print Receipt** button.

- If you click the **OK** button on the *Checkout Receipt* screen you will be returned to the Main screen, where it is indicated that your transaction has been successfully processed.

- ❖ When you have completed your activity in the website, navigate to the top too bar and click **Logout**.

\*\*\*Please Note: This document was created using the Chrome web browser. Warnings, errors or printing functions may appear differently than shown depending on which web browser you are using.\*\*\*