California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Online System

INTRODUCTION
Enacted by Assembly Bill 841 (Ting, Chapter 372, Statutes of 2020) in September 2020, the California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Program consists of two school grant programs – the Ventilation program and the Plumbing program. The Ventilation program provides funding to assess, maintain, and repair ventilation systems in public schools, prioritizing schools in underserved communities. The Plumbing program provides funding to replace aging and inefficient plumbing fixtures and appliances with water-conserving plumbing fixtures and appliances in public schools and state agency buildings, also prioritizing schools in underserved communities.

CalSHAPE Online is the online application and reporting system for the CalSHAPE Program. Applicants will use CalSHAPE Online to submit grant applications and final reporting packages for both the ventilation and plumbing programs. The instructions to register for a user account in CalSHAPE Online are provided below and include the following sections:

These CalSHAPE Online Account Registration Instructions are provided for information purposes only and shall be used solely to assist users with account registration in CalSHAPE Online. CalSHAPE Program requirements can be found in the Ventilation and Plumbing program guidelines. The screenshot depictions are provided for demonstration purposes only and may not reflect actual CalSHAPE Online content. These CalSHAPE Online Account Registration Instructions, including screenshot depictions, should not be substituted for the information or instructions provided in CalSHAPE Online.

ACCESS CALSHAPE ONLINE
CalSHAPE Online is located at https://calshape.energy.ca.gov. It may also be accessed by clicking the CalSHAPE Online link on the CalSHAPE Program webpage at https://www.energy.ca.gov/programs-and-topics/programs/california-schools-healthy-air-plumbing-and-efficiency-program

CREATE NEW ACCOUNT
New users that do not already have a CalSHAPE Online account will follow the process described in this section to create an account. CalSHAPE Online allows for two separate types of users: LEA/Applicant CalSHAPE Administrators and LEA/Applicant Registered Users.

- LEA/Applicant CalSHAPE Administrator – This role is reserved for applicant staff and is limited to three users. CalSHAPE Administrators can manage the applicant account and approve or reject user access requests. Additionally, CalSHAPE Administrators can add, edit, view, and submit applications and reports.

- LEA/Applicant Registered User – This role is open for any applicant staff or contractors associated with the applicant. There is no limit to the number of users the applicant can add as a registered user. Registered users can add, edit, view, and submit applications and reports.

To create a new account, an authorized representative of the applicant will follow the steps listed below.

1. Click the "Register" button in the upper right corner of the home screen.

2. Input the LEA/Applicant code for the school district, charter school, or state agency and click "Submit." For school districts, the LEA code is the school district code plus 7 zeros (ex. 12345670000000). For charter schools, the applicant code is the same as the school's CDS code. State agencies can receive their applicant code by emailing CalSHAPE at calshape@energy.ca.gov.

3. To verify that the correct applicant code was entered, the system will generate a list of possible applicants. In this example, we are using the Del Mar Union Elementary applicant code. Select the correct school district or charter school name and click "Verify".

Please type in the LEA/Applicant code:

37680560000000

Submit

Please select the corresponding district or charter name:

- ○ Kipp Prize Preparatory Academy
- ○ Brittan Elementary
- ✔ Del Mar Union Elementary
- ○ Merced River Union Elementary
- ○ Woodlake Elementary Community Charter
- ○ None of the above

Verify

4. Next, select a user role: LEA/Applicant CalSHAPE Administrator or LEA/Applicant Registered User. Descriptions of these roles are displayed on the CalSHAPE Online screen and are also provided in these instructions, above. Select the applicable user role and click "Continue"

LEA/Applicant CalSHAPE Administrator (Limit 3) – e.g. school district or charter school staff

- Manage applicant account, approve/reject user access requests
- add/edit/view/submit applications and reports

LEA/Applicant Registered User – e.g. school district/charter school staff/contractor

- add/edit/view/submit applications and reports

✔ LEA/Applicant CalSHAPE Administrator   ○ LEA/Applicant Registered User

Continue

5. Read the Terms and Conditions and click "I Agree & Continue"

The CEC is not responsible for the contents of any off-site materials referenced. The user specifically acknowledges that the CEC is not liable for the defamatory, offensive, or illegal conduct of other users, websites, or third parties, and that the risk of injury from the foregoing rests entirely with the user.

Any links in CalSHAPE Online System to other sites on the Internet do not constitute an endorsement from the CEC. These links are provided for informational purposes only. It is the responsibility of the user to evaluate the content and usefulness of materials or information obtained from other sites.

Indemnification

To the extent permitted by applicable law, user agrees to defend, indemnify, and hold harmless the CEC and its directors, officers, employees, and agents from and against all claims and expenses, including attorneys' fees, arising out of the user's use of CalSHAPE Online System and materials and information contained herein.

Choice of Law and Severability

These terms of use, including the legal disclaimers and indemnification, shall be governed by and construed in accordance with the laws of the State of California without giving effect to any principles of conflicts of law. If any provision of these terms of use is declared unlawful, void, or for any reason unenforceable, then that provision shall be deemed severable from the other terms and shall not affect the validity and enforceability of the remaining provisions. Users agree that venue for any court actions arising from the use of CalSHAPE Online System shall be Sacramento County.

Ter   I Agree & Continue   Cancel

6. Fill out the account information fields as prompted. Use a password with more than 15 characters that contains an upper-case letter, a number, and a special character (_, #, %, *, @, $, & =,).

First Name

Last Name

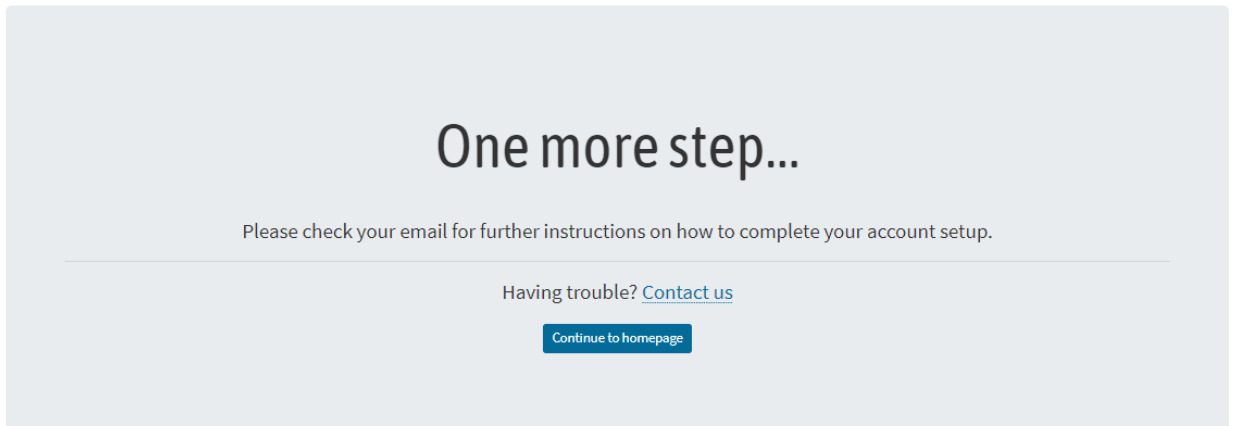**Title** ❓

Applicant Relationship ❓

Phone Number

Email

Confirm Email

Password

Confirm password

Register

4

7. After registering, this page will appear with a prompt to check your email for further instructions.

8. Open the email sent from CalSHAPE@energy.ca.gov and click the link to verify the email address. The link expires 24 hours after it was sent. The automatically generated email received will look like the one below:

Your account was successfully created

CalSHAPE@energy.ca.gov
To   Fri 6/11
Retention Policy   90 Day Mailbox (90 days)   Expires   9/9/2021
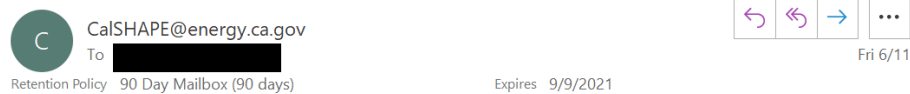
Dear   ,

You are receiving this e-mail because you recently created a new account in the California Schools Healthy Air, Plumbing and Efficiency Program (CalSHAPE).

Before you can login, you need to verify your email address by selecting the following link:

Confirm your account

If clicking on the link above does not work, copy and paste the link into the browser's navigation/address bar to proceed.

Once your email address has been verified, you can log into CalSHAPE.

If you have any problems verifying your account, please reply to this e-mail to get assistance.

Thank you

For CalSHAPE help or questions, send an e-mail to CalSHAPE@energy.ca.gov.

9. After clicking the link in the automatically generated email, a message will be displayed stating that the account has been confirmed. Click the link to go to the login page.

Account Confirmation.

Thank you for confirming your account. Click here to login

10. This link will redirect to the login page. Enter the email address and password and click "Log In" to proceed.

Email Address

Enter a valid email address

Password

Enter password

☐ Remember me?   Forgot your password?

Log in

Don't have an account? Register

11. After logging in, the system will prompt you to complete the two-factor authentication process. Select "Email Code" and click "Submit".

Two-Factor Authentication.

Send verification code

Select Two-Factor Authentication Provider: Email Code ⌄   Submit

12. Check your email for an automatically generated message from no-reply@energy.ca.gov containing a 6-digit authentication code.

no-reply@energy.ca.gov

to me ⌄

Your security code is
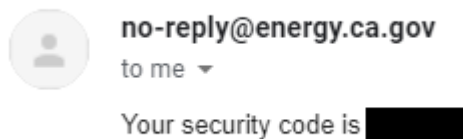
Se

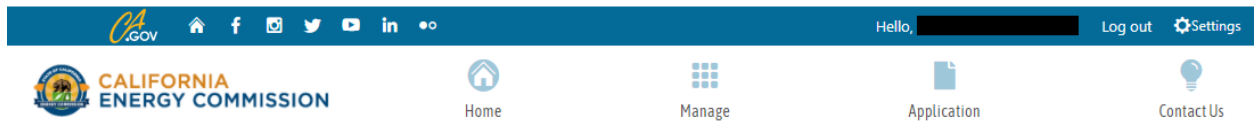13. Enter the code in CalSHAPE Online and click "Submit".

Two-Factor Authentication.

Enter verification code

> Verification code

Remember Browser☐

Submit

14. After logging in, your email address will be visible in the upper righthand corner of the screen. The "Manage" and "Application" menu options will now be available as well.
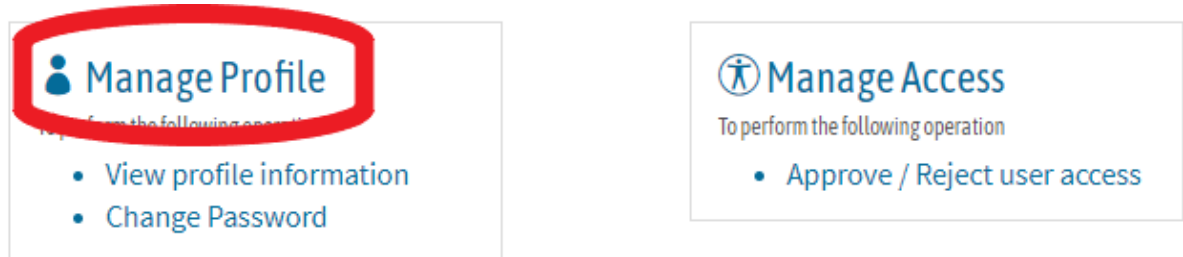

CHANGE PASSWORD

This section provides instructions on how to change the password for the CalSHAPE Online account.

1. To view and edit your account information, click "Manage".
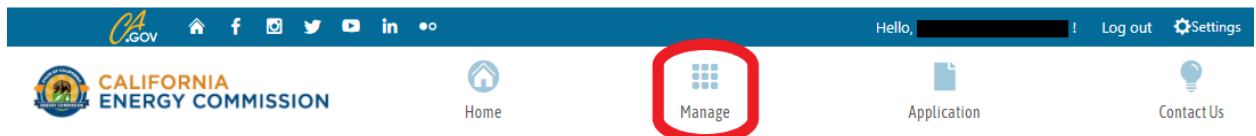
2. The Manage menu will display the options to view profile information, change password, or approve/deny user access. Click "Manage Profile" to proceed. Please note that this screenshot shows the LEA/Applicant CalSHAPE Administrator account options. LEA/Applicant Registered Users will not have the Manage Access panel and only the Manage Profile panel will be displayed.

👤 Manage Profile

- View profile information
- Change Password

⊕ Manage Access
To perform the following operation

- Approve / Reject user access

3. Clicking this link will display the Manage Account detail page along with personal account information. To change your password, click "Change".

Manage Account.

FIRST NAME	▮▮▮
LAST NAME	▮▮▮
EMAIL	▮▮▮▮▮
PHONE NUMBER	▮▮▮
TITLE	test
LEA RELATIONSHIP	test

Password: [Change]

4. On the next page, enter the current password along with a new password that meets the system requirements. Enter the new password a second time to confirm and click "Change Password".

Manage Password.

Change Password Form

Current password

New password

Confirm new password

Change Password

5. The system will return to the Manage Account page with a message confirming that the password has successfully been changed.

Manage Account.

Your password has been changed.

|	
FIRST NAME	▮▮
LAST NAME	▮▮▮
EMAIL	▮▮▮▮▮
PHONE NUMBER	▮▮▮
TITLE	test
LEA RELATIONSHIP	test

Password: [Change]

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MANAGE ACCESS

This section describes how to grant or request access to an applicant's applications. When an LEA/Applicant Registered User account is created with an applicant code, an access request is automatically sent to the LEA/Applicant CalSHAPE Administrator for that applicant. The LEA/Applicant CalSHAPE Administrator grants access to LEA/Applicant Registered Users as part of the account setup process. This section will describe instructions for both LEA/Applicant CalSHAPE Administrators and LEA/Applicant Registered Users.

LEA/Applicant CalSHAPE Administrators

1. LEA/Applicant CalSHAPE Administrators will receive an automatically generated email notifying them of a new access request from an LEA/Applicant Registered User. To view and approve or reject the access request, click "Manage".
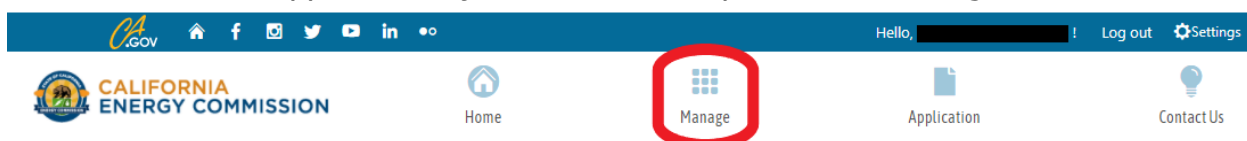
2. Click "Manage Access" to view pending access requests.

3. This will lead to the Access Requests List menu where all access requests for the LEA/applicant code can be viewed. Click "Edit" to view more information about a specific request.

4. This page contains basic contact and occupation information on the LEA/Applicant Registered User that submitted the request. Click "Approve" to grant the applicant Registered User permission to access the applicant's applications. To deny a request, click "Reject".

Manage access permission to your district / charter applications. Learn more

Approve		Reject

Basic info

NAME	███████████
TITLE	Assistant to the Regional Manager
RELATIONSHIP	AARM

Contact info

EMAIL	████████████████
PHONE	████████

5. After clicking "Approve", the system will return to the Access Request List. The system will generate a message confirming that the user can now access the applicant's applications. Please note that the request status has changed from "Pending" to "Approved" as well.

Update success. The user '████████' can now access your applications.

Access Requests List

Filter: Enter a LEA code or user's email

| LEA Code	Name	Email	Title	Status	
34673140000000	████████	████████████	Assistant to the Regional Manager	Approved	Edit

LEA/Applicant Registered Users:

1. To request access to another applicant, begin the process by clicking "Application" on the main menu. Please note: the system automatically sends an access request to the LEA/Applicant CalSHAPE Administrators for the applicant code that is entered when creating an LEA/Applicant Registered User account, so the instructions provided below do not need to be followed to request access to that applicant's application.

2. On the Application menu, all pending, approved, and rejected access requests will be visible. Please note that the automatically generated access request will appear here when accessing this page for the first time. To request access to another applicant's application, click "Request Access."
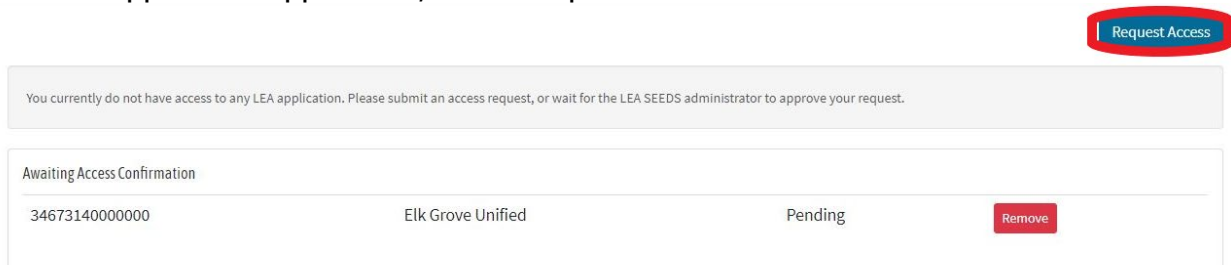
3. Enter the LEA/applicant code for the school district, charter school, or state agency and click "Submit." For school districts, the LEA/applicant code is the school district code plus 7 zeros (ex. 12345670000000). For charter schools, the applicant code is the same as the school's CDS code. State agencies can receive their LEA/applicant code by emailing CalSHAPE at calshape@energy.ca.gov.

4. To verify that you have entered the correct LEA/Applicant code, the system will generate a list of possible applicants. In this example, we are using the Lighthouse Community Charter High LEA/Applicant code. Select the correct school district or charter school name and click "Verify".

Submit An Access Request

Please type in the LEA code:

01612590108944

Submit

Please select the corresponding district or charter name:

- ○ Buttonwillow Union Elementary
- ○ Gold Trail Union Elementary
- ○ HomeTech Charter
- ○ Aveson Global Leadership Academy
- ✔ Lighthouse Community Charter High
- ○ None of the above

Verify

5. Read the terms and conditions and click "Submit Access Request".

Terms and Conditions

By using this California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Online System, you signify your assent to these terms of use. If you do not agree to them, please do not use the site. User expressly acknowledges that use of this site is at user's sole risk.

You hereby expressly acknowledge and agree to the following terms and conditions: CalSHAPE Online System is the property of the California Energy Commission (CEC), an agency of the State of California, and may only be accessed by authorized users. Conducting or facilitating the unauthorized access, use, disruption, modification, or destruction of CalSHAPE Online System is strictly prohibited and may subject you to criminal liability under various state laws, including California Penal Code Section 502, and may also subject you to civil liability.

The CEC may monitor any activity or communications on CalSHAPE Online System and retrieve any information stored within CalSHAPE Online System. By entering CalSHAPE Online System, you are consenting to such monitoring and information retrieval for law enforcement and other governmental purposes, including for purposes of conducting civil and criminal investigations and initiating legal actions.

Any information or communications created, maintained, and/or stored within CalSHAPE Online System, including information stored centrally, locally on a disk drive, or on removable electronic storage media, will become public records subject to disclosure under the California Public Records Act (Government Code Section 6250 et seq.). By accessing and using CalSHAPE Online System you expressly agree to conduct any and all transactions with the CEC under the CalSHAPE program electronically within CalSHAPE Online System, including sending and receiving communications to and from the CEC concerning your participation in the CalSHAPE program, including participation related to grant applications, eligibility, funding awards, reporting, and other important matters.

You acknowledge that you have read and understood the CEC's CalSHAPE Ventilation Program Guidelines and CalSHAPE Plumbing Program Guidelines. You acknowledge that any grant application approval from the CEC is conditioned on the local educational agencies' (LEA) acceptance and ongoing satisfaction of all CalSHAPE program requirements, including those as set forth in the CalSHAPE Ventilation Program Guidelines and CalSHAPE Plumbing Program Guidelines.

You further acknowledge that the CEC may revise the CalSHAPE Ventilation Program Guidelines and/or CalSHAPE Plumbing Program Guidelines in the future and it is your responsibility to remain informed of any changes to the CalSHAPE Ventilation Program Guidelines and CalSHAPE Plumbing Program Guidelines that could affect applicant eligibility or any other part of the CalSHAPE program. You hereby declare under penalty of perjury that the information you provide within CalSHAPE Online System, including any documents, is true and correct to the best of your knowledge and that you are authorized to submit this information using CalSHAPE Online System on behalf of the LEA.

Submit Access Request   Cancel

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6. Once you have submitted the request, the system will return to the Submit an Access Request page. An email will be sent to the LEA/Applicant CalSHAPE Administrator for that applicant code notifying them of the pending access request. The system will display a message confirming that the request has been submitted.
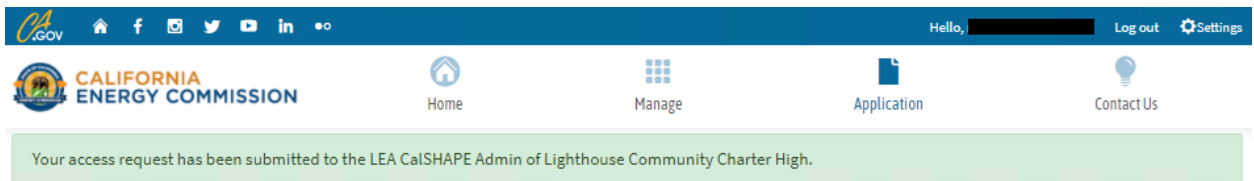
7. If the request is approved by an LEA/Applicant CalSHAPE Administrator, you will receive a notification email confirming approval. You will now be able to view information for that applicant under the Application menu, including the LEA/Applicant CalSHAPE Administrator contact information, total number of schools and number of schools that meet underserved community eligibility criteria. From here, you will be able to start an application for the ventilation or plumbing programs when the programs begin accepting applications.