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. Local educational agencies (LEA) 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:

- Access CalSHAPE Online – p. 1
- Create New Account – p. 1
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- Manage Accesses – p. 9

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

LEA Registered User – This role is open for any LEA staff, school staff, or contractors associated with the LEA. There is no limit to the number of users the LEA 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 LEA will follow the steps listed below.

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

2. Input the LEA code for the school district or charter school and click “Submit”. For school districts, the LEA code is the school district code plus 7 zeros (ex. 12345670000000). For charter schools, the LEA code is the same as the school’s CDS code.
3. To verify that the correct LEA code was entered, the system will generate a list of possible LEAs. In this example, we are using the Del Mar Union Elementary LEA code. Select the correct school district or charter school name and click “Verify”.

4. Next, select a user role: LEA CalSHAPE Administrator or LEA 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”
5. Read the Terms and Conditions and click “I Agree & Continue”

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 (_,#,%,*,@,$,&,=,!).
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 automatically generated email that is received will look like the one below:

Your account was successfully created

![Email Example]

Dear [Name],

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 log in, 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.

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 [REDACTED]
13. Enter the code in CalSHAPE Online and click “Submit”.

**Two-Factor Authentication.**

Enter verification code

[Image: Verification code field with “Submit” button highlighted]

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”.

[Image: Manage menu with “Manage Profile” and “Manage Access” options]

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 CalSHAPE Administrator account options. LEA Registered Users will not have the Manage Access panel and only the Manage Profile panel will be displayed.

[Image: Manage Profile and Manage Access options with bullet points]
3. Clicking this link will display the Manage Account detail page along with personal account information. To change your password, click “Change”.

Manage Account.

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

LEA CalSHAPE Administrators
1. LEA CalSHAPE Administrators will receive an automatically generated email notifying them of a new access request from an LEA 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 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 Registered User that submitted the request. Click “Approve” to grant the LEA Registered User permission to access the LEA’s applications. To deny a request, click “Reject”.

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 LEA’s applications. Please note that the request status has changed from “Pending” to “Approved” as well.

LEA Registered Users:

1. To request access to another LEA, begin the process by clicking “Application” on the main menu. Please note: the system automatically sends an access request to the LEA CalSHAPE Administrators for the LEA code that is entered when creating an LEA Registered User account, so the instructions provided below do not need to be followed to request access to that LEA’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 LEA, click “Request Access”.

3. Enter the LEA code for the school district or charter school and click “Submit”. For school districts, the LEA code is the school district code plus 7 zeros (ex. 12345670000000). For charter schools, the LEA code is the same as the school’s CDS code.

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

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5. Read the terms and conditions and click "Submit Access Request".
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 CalSHAPE Administrator for that LEA 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 CalSHAPE Administrator, you will receive a notification email confirming approval. You will now be able to view information for that LEA under the Application menu, including the LEA 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.