CALIFORNIA
ENERGY COMMISSION

California Energy Commission

California Schools Healthy Air, Plumbing, and Efficiency Online System

CalSHAPE Ventilation Program Application Instructions Companion Document

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CalSHAPE Online System
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The California Energy Commission (CEC) administers the California Schools Healthy Air, Plumbing, and Efficiency Program (CalSHAPE). The CalSHAPE Online System (system) is the online application and reporting system for the CalSHAPE Program. This system is employed by local educational agencies (LEA) to submit applications and final reporting packages for the two CalSHAPE grant programs: CalSHAPE Ventilation Program and CalSHAPE Plumbing Program.

The CalSHAPE Ventilation Program Application Instructions Companion Document provide information to complete and submit an application for the CalSHAPE Ventilation Program. The instructions also include general information and tips on navigating the system. Instructions for the CalSHAPE Plumbing Program application are provided in a separate document.

The system can be accessed at https://calshape.energy.ca.gov/.

A user must have an account in the system to apply for a CalSHAPE Program grant. Instructions to register for a user account in the system are provided in the CalSHAPE Online Registration Instructions found at https://www.energy.ca.gov/media/5800.

This companion document is provided for informational purposes only to assist users with employing the system. It does not include CalSHAPE Ventilation Program information or requirements. CalSHAPE Ventilation Program information and requirements are provided in the *CalSHAPE Ventilation Program Revised Commission Guidelines* (guidelines), found on the CalSHAPE Program webpage at https://www.energy.ca.gov/programs-and-topics/programs/california-schools-healthy-air-plumbing-and-efficiency-program.

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General Information and Navigation

Dynamic Buttons:

Buttons change color indicating if the application needs action. For example:

- When creating new applications, the color of text within a button changes from white to black when the maximum number applications is reached. An example is displayed in Table 4.
- A light blue button indicates an application is incomplete and the system prevents the user from proceeding to the final review page. Once the application has all required information, the system changes the button from light blue to a dark blue and the user can continue to a final review page. An example is displayed in Table 5.

Save Information:

Users must click on the save button to save any changes made to the application. The system conducts validation checks of new changes. If the user inputs new information and does not save, or moves pages, the system will not save a draft and the user will need to re-enter the information.

Multiple Users:

- Multiple users can be in one application at the same time. A user is able to overwrite another user's information based on the most recent saved information in the system.

System Navigation:

- Navigation buttons are found throughout the application process:
  - Forward and backward navigation buttons are on the bottom of the page.
  - Internet browser navigation buttons are also an option for use.
  - A light green arrow at the top of the application allows user to navigate backwards in the application.
  - Please note, some internet browsers have the backspace button as a backwards navigation option.

Log in Information

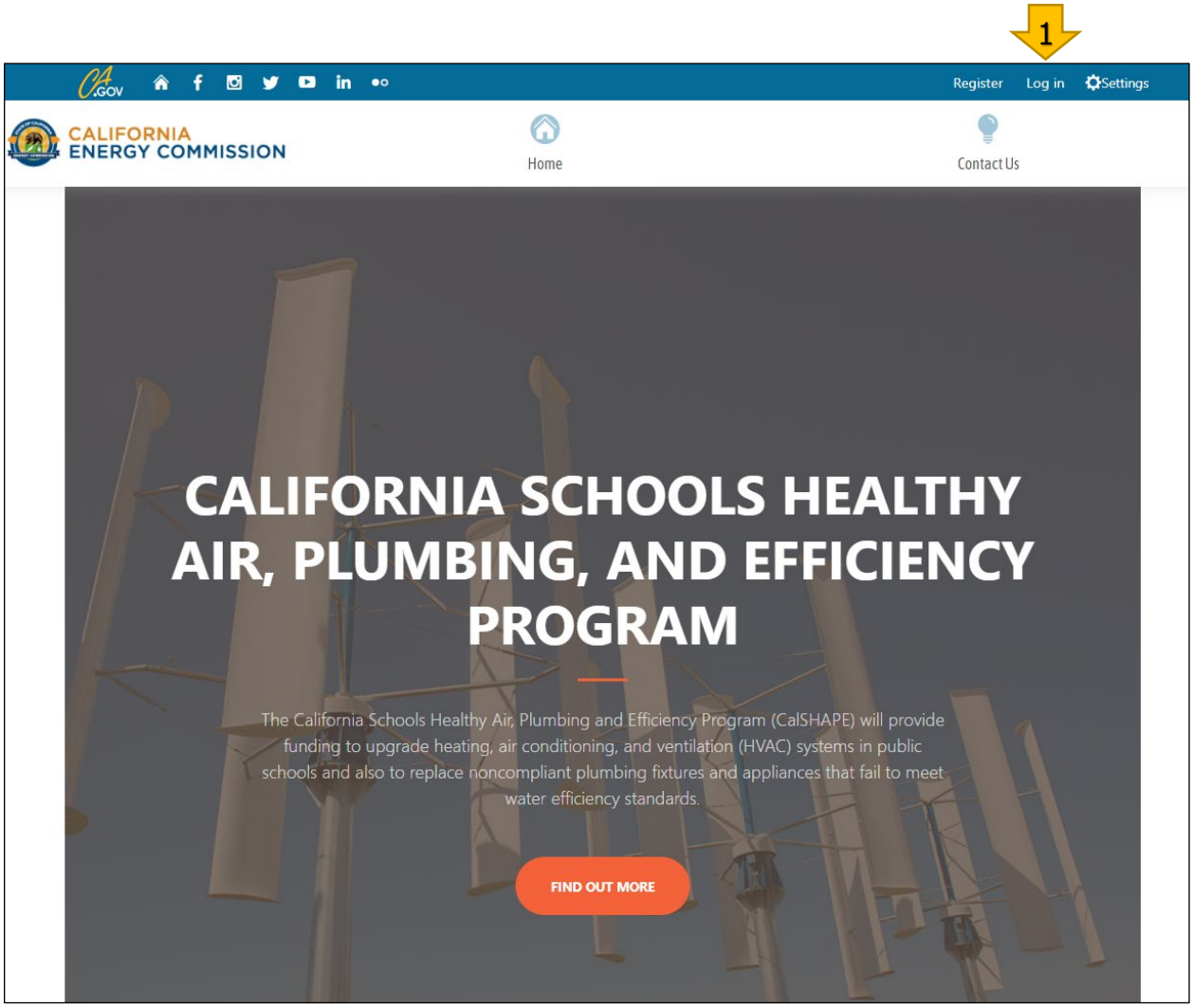
Instructions on system log in and application access are provided in Steps 1 – 3. The steps also include List of Icons tables with information on the function of the buttons on the pages.

Step 1: CalSHAPE Online System Homepage

<u>Instructions</u>

1. Click on "Log in" located at the top of the screen.

Figure 1: CalSHAPE Online Application Homepage



Source: California Energy Commission, CalSHAPE Online System

Table 1: List of Icons on CalSHAPE Online System Homepage

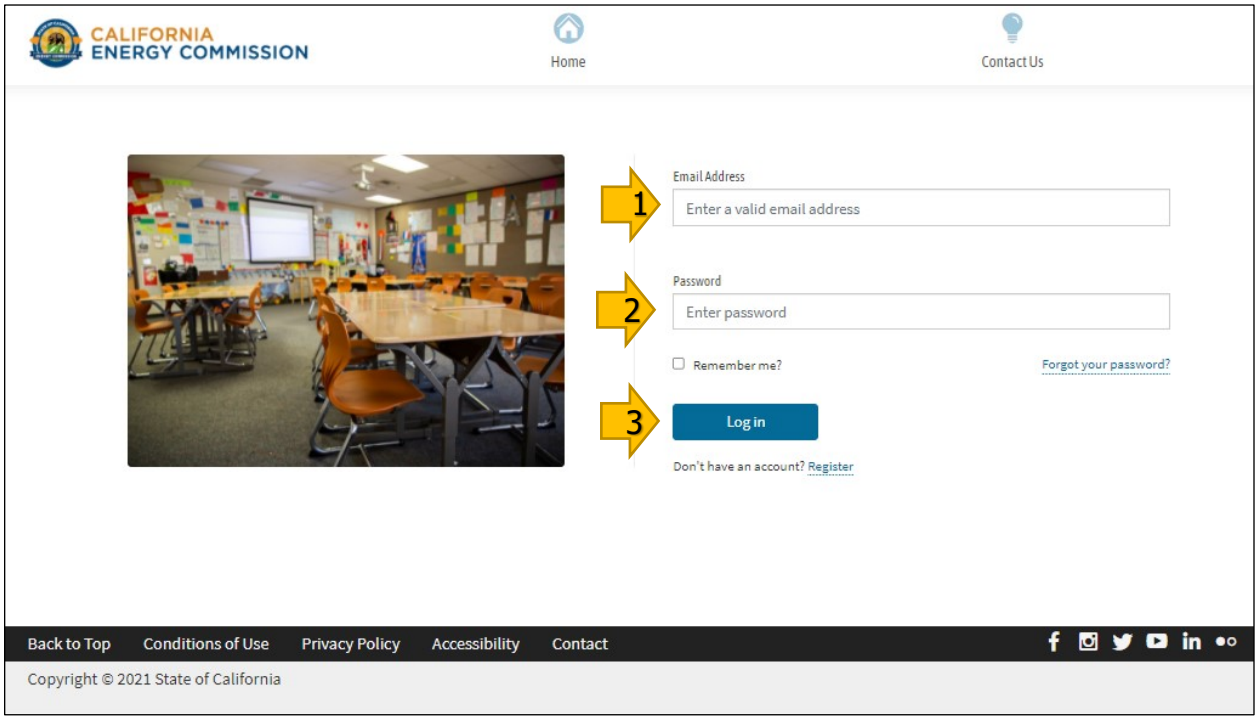
Icons	Name	Description
Register	Register	Register button brings user to new page. For further instructions on how to register, refer to the registration instructions on CalSHAPE Program webpage found at https://www.energy.ca.gov/programs-and-topics/programs/california-schools-healthy-air-plumbing-and-efficiency-program.
Log in	Log in	Log in button brings user to a new page. Log in credentials are needed to continue. Please refer to Step 2: Log in Page.
Settings	Settings	Users can change font and contrast of webpage as needed.
Home	Home	Home button brings user to the CalSHAPE homepage as shown in the figure above.
Contact Us	Contact Us	User can find information on how to contact CalSHAPE staff.

Step 2: Log in Page

Instructions

1. Enter the email address in the box provided.
2. Enter the password for the system account in the box provided.
3. Click on the "Log in" button.

Figure 2: CalSHAPE Log in Page



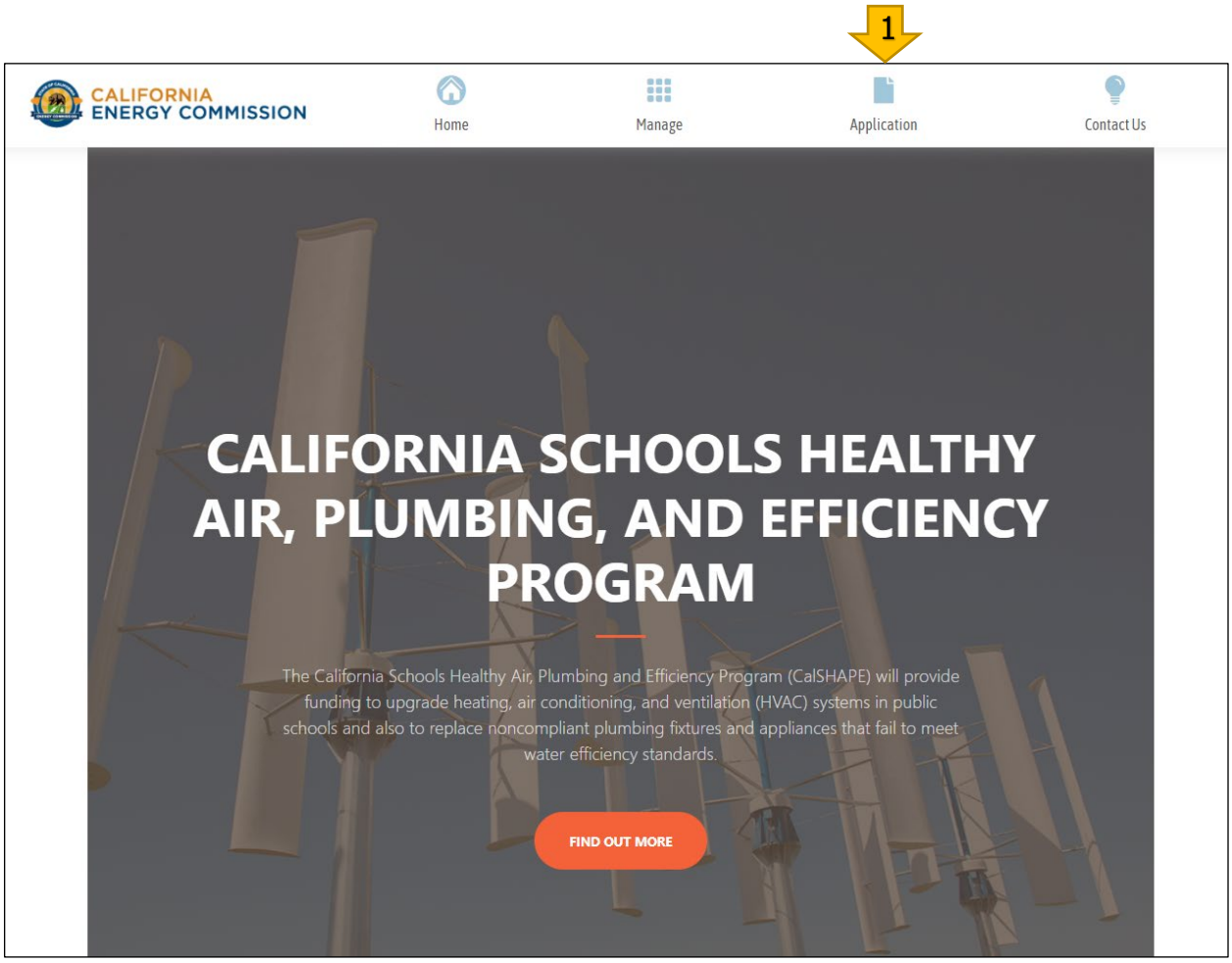
Source: California Energy Commission, CalSHAPE

Step 3: Account Homepage

<u>Instructions</u>

1. To access the Application Homepage, click on the "Application" button located at the top of the screen.

Figure 3: CalSHAPE Account Homepage



Source: California Energy Commission, CalSHAPE

Table 2: List of Icons on Account Homepage

Icons	Name	Description
Manage	Manage	Manage button allows the user to manage their account profile by viewing information or changing their password. **Please note**, only LEA CalSHAPE Administrators are able to manage user access by approving or rejecting any requests submitted by a user. For more information about requesting access, go to Step 1: Application Homepage Plumbing Application Information.
Application	Application	Application button brings the user to the application homepage. Users are able to see the sites they registered for and view the status of the application(s). For more information go to Step 1: Application Homepage under Plumbing Application Information.

Ventilation Application Instructions – Main Pages

Steps 1 – 6 explain how to start an application, upload documents, add eligible sites to the application, and provide LEA information. The steps also include List of Icons tables with information on the function of the buttons on the pages.

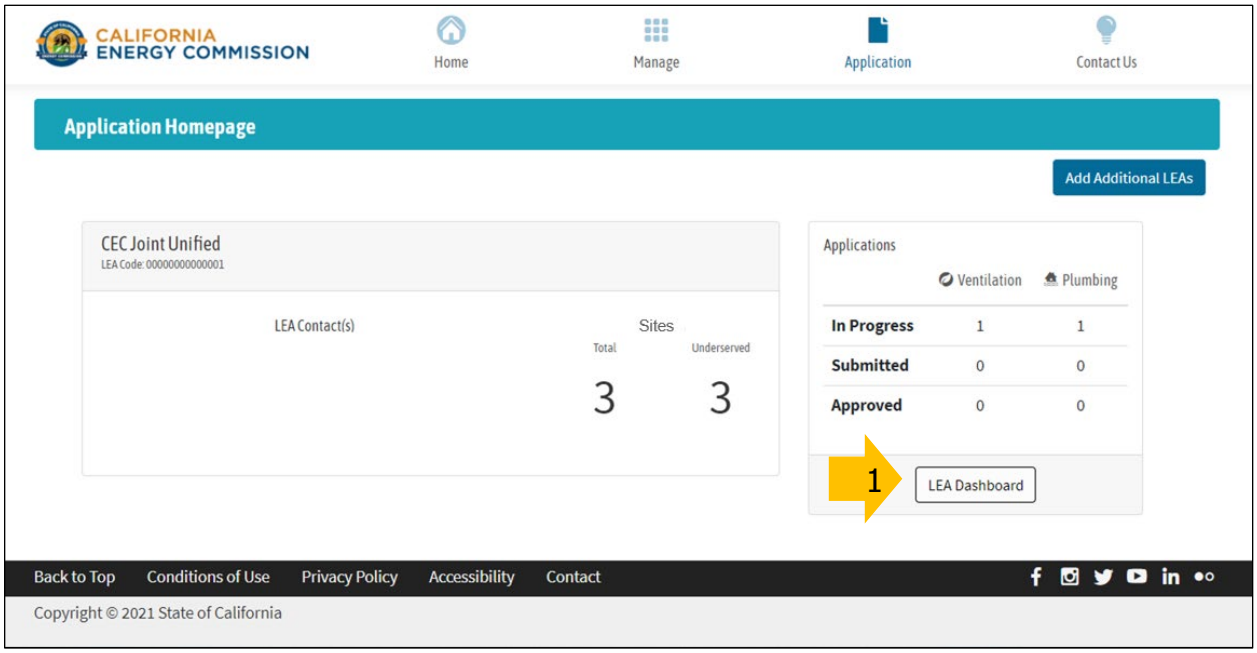
Step 1: Application Homepage

The Application Homepage provides LEA information and an Application Summary with the number of the Ventilation and Plumbing applications that are in progress, submitted, and approved.

<u>Instructions</u>

1. Click on the "LEA Dashboard" button to proceed to the LEA Dashboard.

Figure 4: Application Homepage



Source: Source: California Energy Commission, CalSHAPE

Table 3: List of Icons on Application Homepage

Icons	Name	Description
Add Additional LEAs	Add Additional LEAs	Add Additional LEAs button allows registered user to request access to LEA sites. Upon submission request, registered admin will receive an email notification and will need to log into the system to approve or reject new user.
Sites Total 2 Underserved 2	Sites List	The sites list is an indicator of the total amount of sites under an LEA and the total amount of sites that are in underserved communities.
Applications Ventilation Plumbing In Progress 1 1 Submitted 0 1 LEA Dashboard	Application Summary	The application summary is a view of progress for a draft, submitted, or approved application.

Step 2: LEA Dashboard

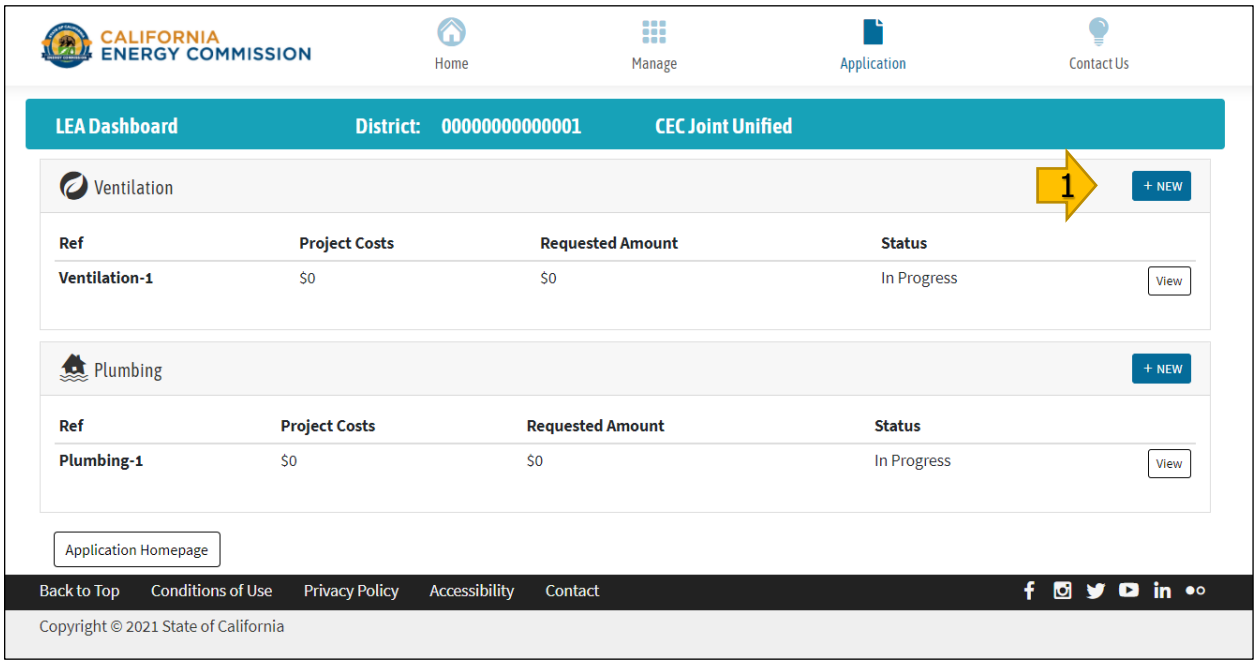
The LEA Dashboard displays a list of Ventilation and Plumbing applications and information on each application's project costs, requested amount, and application status. It also provides the option to start a new application until the maximum of three applications in the funding round have been started or all eligible sites have been added to an application. The three application per funding round and eligible sites limits are specific to each program. When the limits are reached, the text color of the button that is clicked on to start a new application will change from white text to

black text to indicate that no additional applications can be started. Examples of the buttons are provided in Table 4.

Instructions

1. Click on the "+ NEW" button in the Ventilation section to start a new ventilation application.

Figure 5: LEA Dashboard



Source: California Energy Commission, CalSHAPE Online System

Table 4: List of Icons on LEA Dashboard

Icons	Name	Description
+ NEW	+ NEW Application	When "+ New" is in white text, the user can create a new application. The maximum number of applications allowed per program is three.
+ NEW	+ NEW Application	When "+ New" is in black text, the user will not be able to create a new application because three applications have been started or all eligible sites were added to an application.
View	View	The view button allows the user to view an application.
Application Homepage	Application Homepage	Application Homepage allows the user to return to the previous page.

Step 3: Application Main

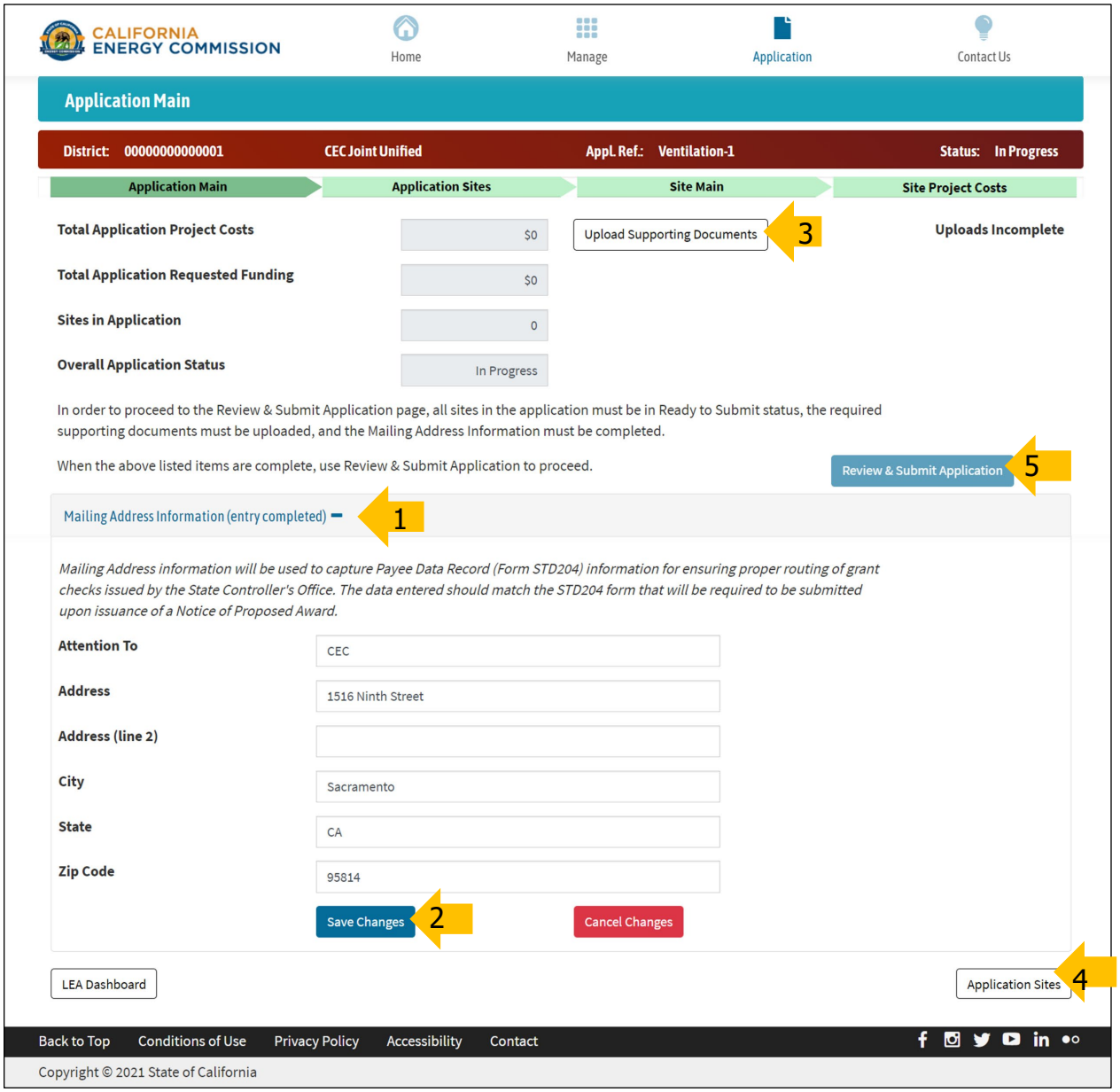
The Application Main page displays specific application information including the number of sites in the application and the total application project costs and requested funding. It also includes a section to enter the Mailing Address Information and a button to navigate to the Uploading Supporting Documents page. **Please note:** The Mailing Address information must be completed first before the user is able to proceed with completing the other parts of the application.

The "Review & Submit Application" button on this page will be a light blue color until the application is complete, which includes having all site-specific pages in Ready to Submit status, all required supporting documents uploaded, and the mailing address information complete. When the application is complete, the button will turn to a dark blue color and will be enabled to click on to move to the next page. Examples of the button are provided in Table 5 below.

<u>Instructions</u>

1. Fill in the information in the Mailing Address Information section. The information that must be provided is Attention To, Address, Address (line 2, if applicable), City, State, and Zip Code. **Please note:** The address information entered here must match the address information that will be provided on the STD204, which is a required document after the user receives a Notice of Proposed Award.
2. Click on the "Save Changes" button to save the mailing address information. A confirmation message that shows "Update completed" will appear in a green bar at the top of the screen and the section header will change to read "Mailing Address Information (entry completed)." This section needs to be completed for the user to proceed to the Uploading Supporting Documents and Application Sites parts of the application.
3. Click on the "Upload Supporting Documents" button to upload the required documents to the ventilation application. This will bring the user to the Upload Supporting Documents page, which is described in Step 4: Upload Supporting Documents, below.
4. Click on the "Application Sites" button to advance in the application to the Site Selection page where the user will add eligible sites to the application. The Site Selection page is described in Step 5: Application Sites – Site Selection, below.
5. This step is completed after all sites are in "Ready to Submit" status as described in Step 6: Application Sites – Manage Site Entries, Instruction 4. The "Review & Submit Application" button will now be enabled. Click on the "Review & Submit Application" button to proceed to the Review and Submit Application page. Instructions for the Review and Submit Application page are provided in the Plumbing Application Instructions – Submit Application section.

Figure 6: Application Main



Source: California Energy Commission, CalSHAPE Online System

Table 5: List of Icons on Application Main

Icons	Name	Description
Mailing Address Information (entry completed) + Mailing Address Information (entry completed) −	Mailing Address Information Accordion	Users need to complete Mailing Address Information before continuing with the application. (+/- signs indicate if the tab is open or closed).
Upload Supporting Documents	Upload Supporting Documents	Users are able to upload supporting documents to the application. For more information, please see Step 4: Upload Supporting Documents.
Uploads Incomplete **Uploads Complete**	Document Upload Indicator	System indicates to user when the documents are missing or completed.
Save Changes	Save Changes	Use the Save Changes button to update the application.
Cancel Changes	Cancel Changes	Use the Cancel Changes button to cancel any changes made in the application.
Review & Submit Application	Review & Submit Application	Review & Submit Application is light blue indicating that the application is incomplete and in progress.
Review & Submit Application	Review & Submit Application	When the Review & Submit Application button is dark blue, it signifies that the

		application is ready for review and submittal.
LEA Dashboard	LEA Dashboard	LEA Dashboard button allows user to go back a page.
Application Sites	Application Sites	Application Sites Button allows user to go forward a page.

Step 4: Upload Supporting Documents

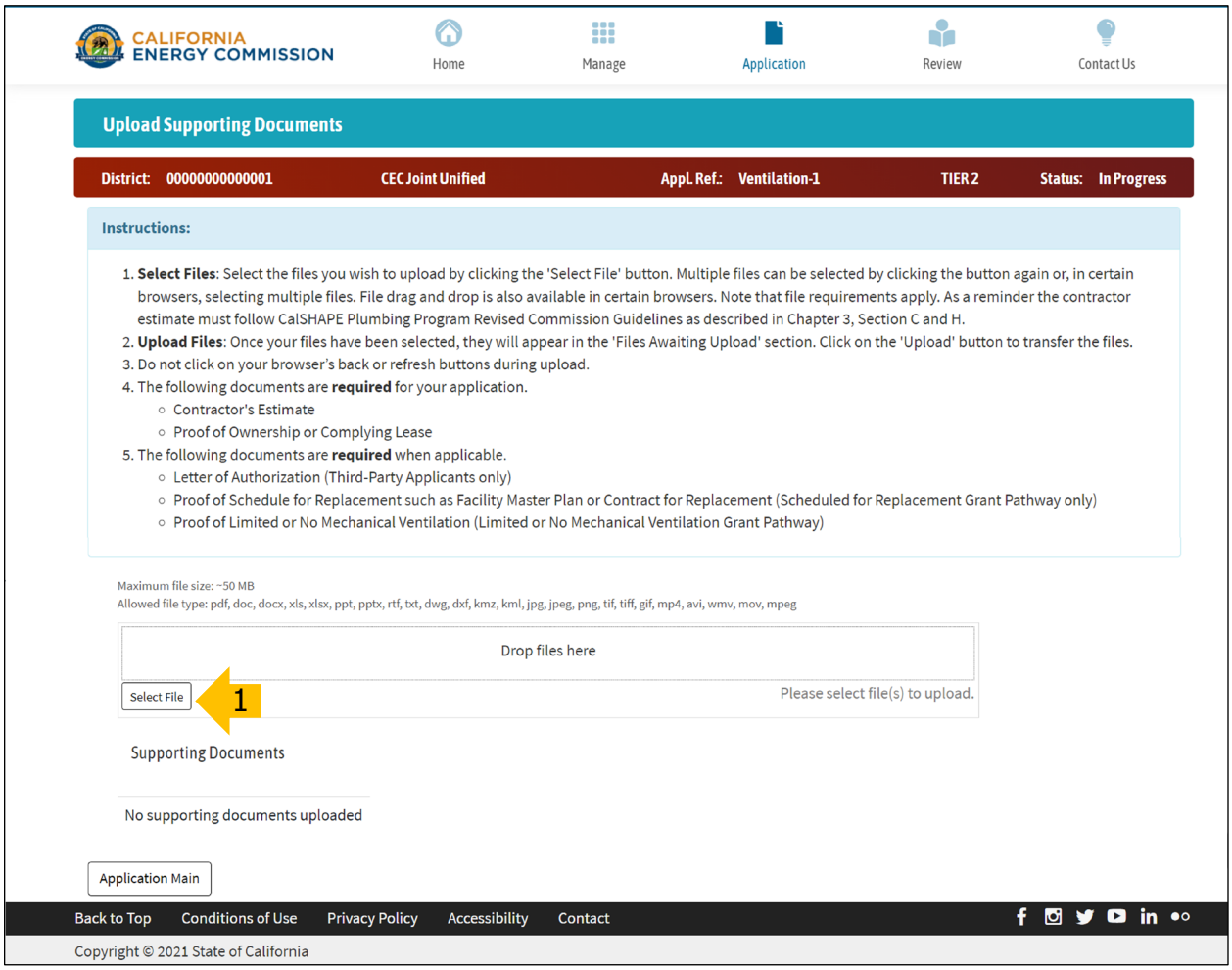
All required supporting documents must be uploaded to the Upload Supporting Documents page. The required supporting documents are described in the guidelines, and may include:

- Contractor estimate
- Proof of ownership or complying lease
- Certificate of Good Standing – Charter Schools only
- Letter of authorization – third-party applicants only
- Proof of Scheduled for Replacement such as Facility Master Plan or Contract Replacement (Scheduled for Replacement Grant Pathway only)
- Proof of Limited or No Mechanical Ventilation (Limited or No Mechanical Ventilation Grant Pathway only)

<u>Instructions</u>

1. Click on the "Select File" button under the "Drop files here" box. This will pull up a file browser to choose the file to upload. Click on the document file and confirm that the file name appears in the File name box, then click "Open."

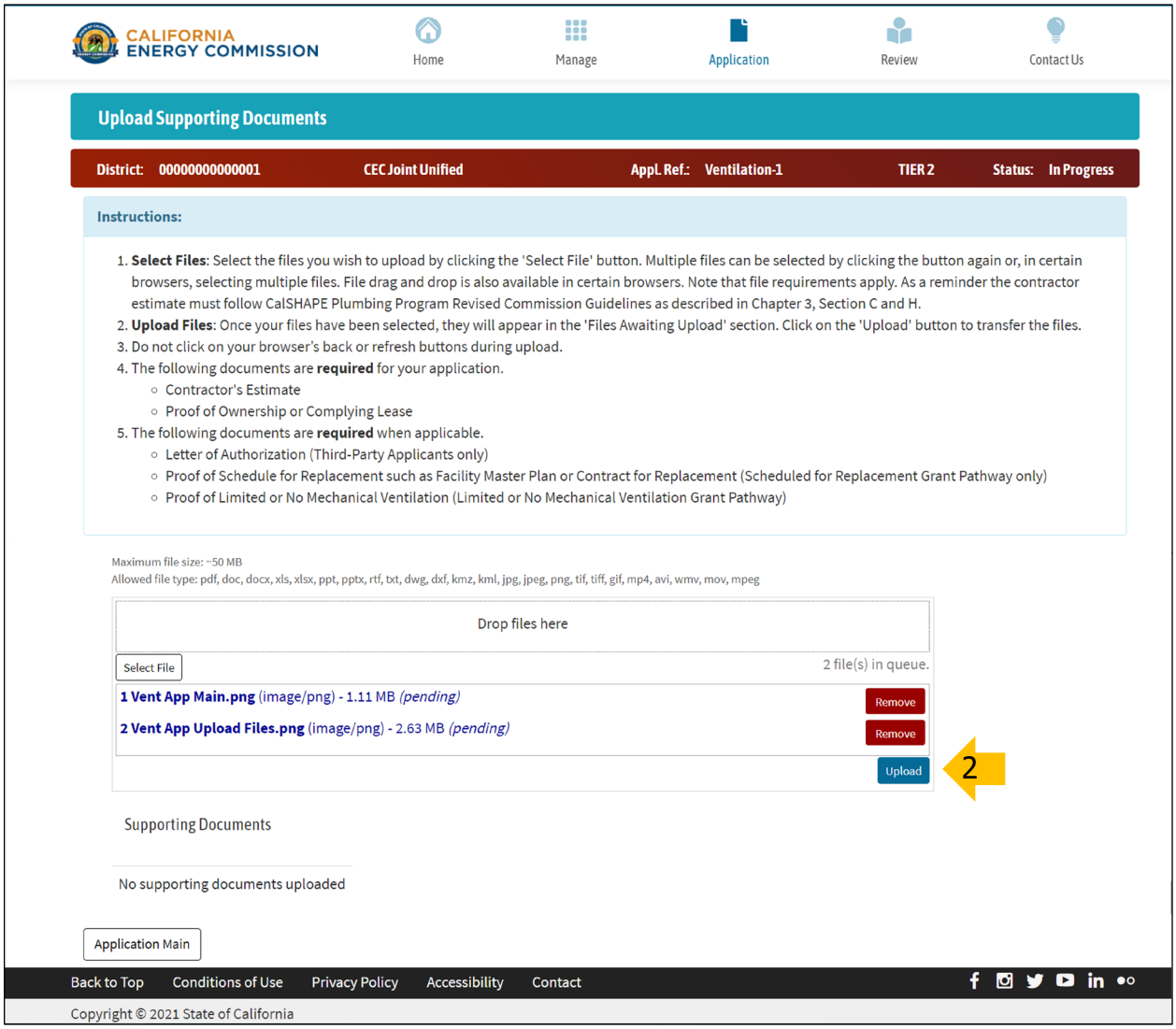
Figure 7: Upload Supporting Documents



Source: California Energy Commission, CalSHAPE Online System

2. The process described in Instruction 1 above can be repeated to upload multiple documents at one time or the documents can be uploaded individually. All documents chosen to be uploaded will be listed in the files awaiting upload section under the "Select File" button. Click on the "Upload" button to upload the documents.

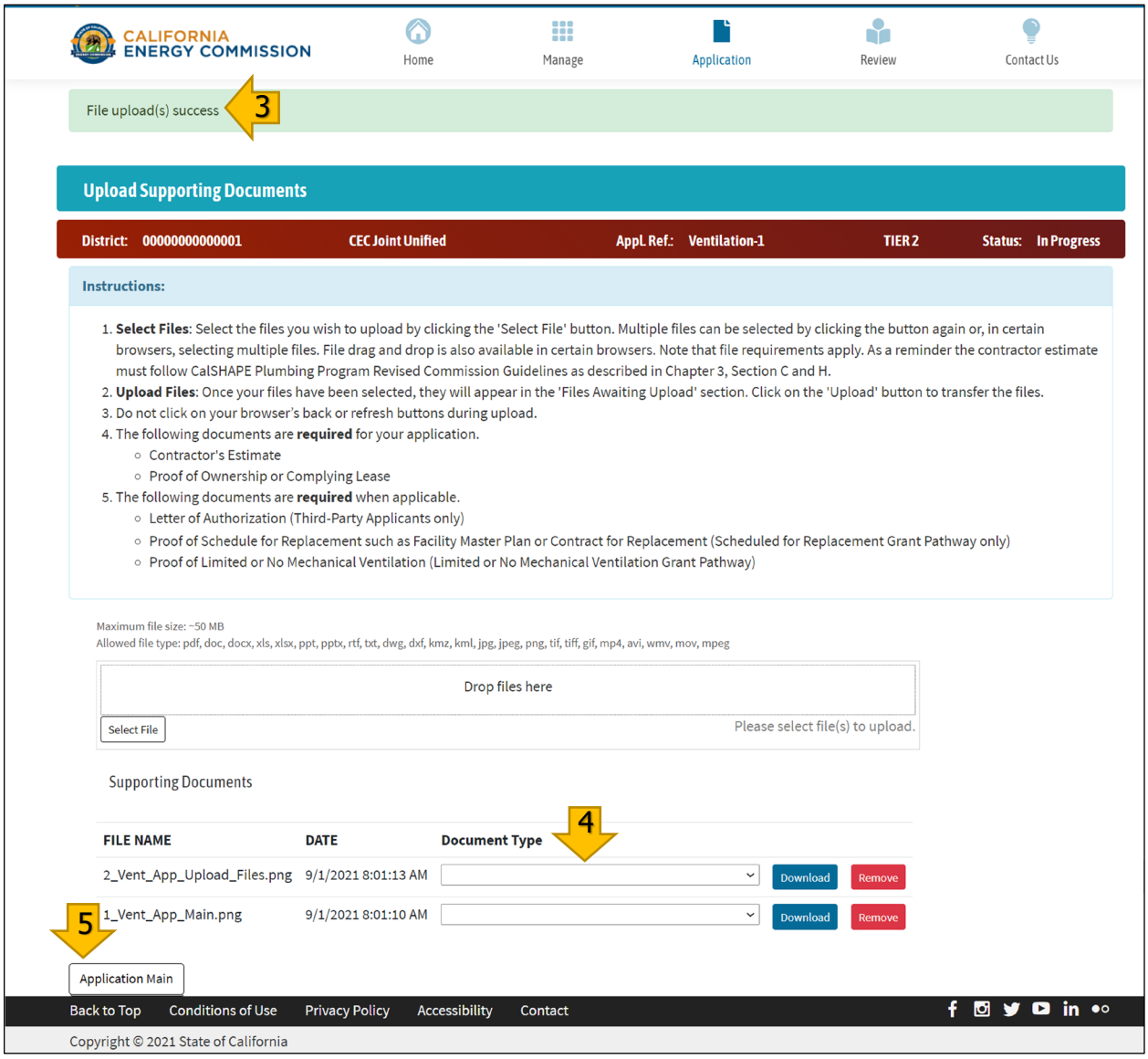
Figure 8: Upload Selected Documents



Source: California Energy Commission, CalSHAPE Online System

3. Once the upload is complete, a green bar will display at the top of the screen with a "File upload(s) success." message.
4. The File Name and Date of each of the uploaded documents will be listed under the Supporting Documents header at the bottom of the page. The Document Type must be selected for each document. To select the document type, click on the dropdown arrow in the box to view the list of document types. Click on the correct document type for the document. The document type will highlight in blue after its selected and will appear in the Document Type box. The selected document types will save automatically.
5. Click on the "Application Main" button to return to the Application Main page.

Figure 9: Selecting Document Type



Source: California Energy Commission, CalSHAPE Online System

Table 6: List of Icons on Application Document Upload

Icons	Name	Description
Select File	Select File	Select File button is used to upload supporting documents to the application.
Remove	Remove	Remove button is used to delete unwanted files in the application.
Upload	Upload	Upload button is used to have the system save the documents to the application.
Download	Download	Download button is used to download a file that was uploaded to the application.
Contractor's Estimate Contractor's Estimate Proof of Ownership or Complying Lease Certificate of Good Standing Letter of Authorization for Third-Party Applicants	Document Type Dropdown	Document Type Dropdown is used to label the uploaded file.
Application Main	Application Main	Application Main button allows user to go back a page.

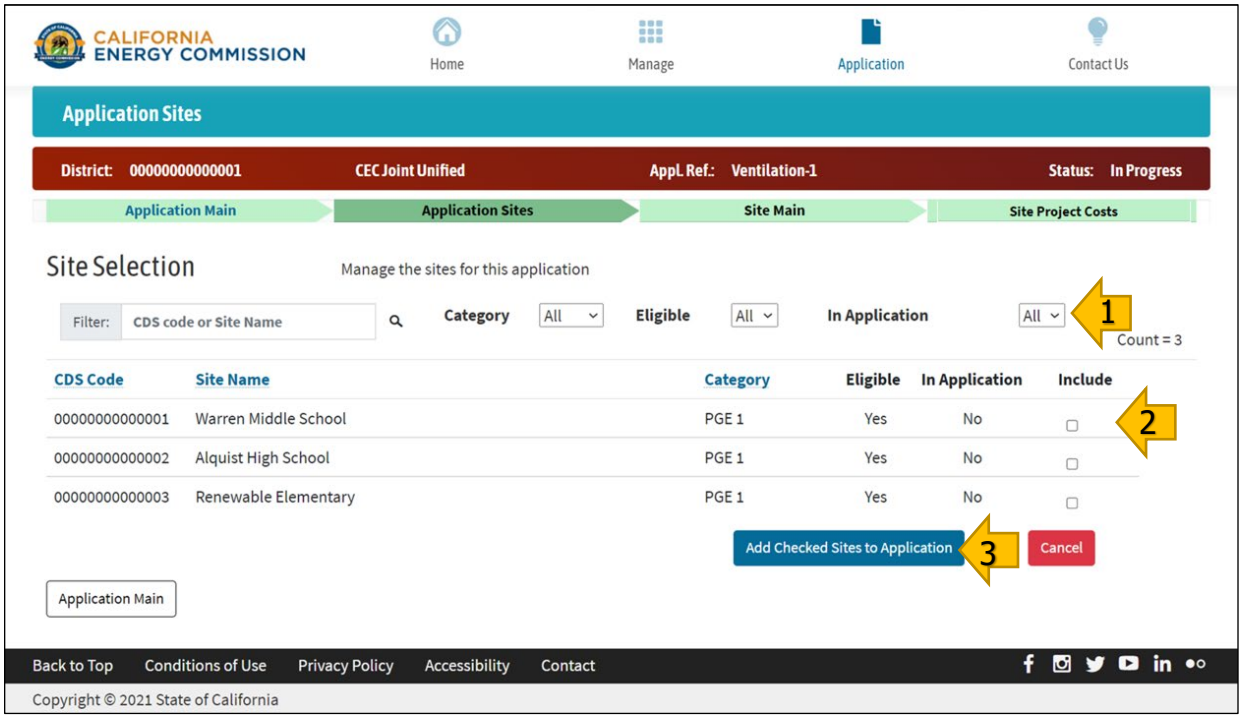
Step 5: Application Sites – Site Selection

The Application Sites – Site Selection page is used to add sites to the application. All of the LEA's sites are listed on this page with a "Yes" or "No" indication of Eligible and In Application for each site. A site with "Yes" for Eligible meets the Underserved Community requirements, as defined in the guidelines, and is eligible for funding in the initial phase of program awards. A site with "No" for Eligible does not meet the Underserved Community requirements and is not eligible for funding in the initial phase of program awards. If a site that meets the Underserved Community requirements is missing from the list or shows "No" for Eligible, please send an email to CalSHAPE@energy.ca.gov for assistance.

Instructions

1. Use filter options at the top of the page to filter and sort sites by category, eligibility, or sites that are already in an application. In entering a CDS code or site name in the "Filter" search box, an entry of partial text or the last four numbers of the CDS code can help search for sites. The user has the options of hitting the "enter" button on the keyboard, clicking on the magnifying glass, or simply leaving the text box for the system to start the search for sites that meet the criteria.
2. To add a site to the application, click on the check box under the Include header for the site. There is no limit on the number of sites that can be included in an application, but each site can only be included in an application once per funding round.
3. Click the "Add Checked Sites to Application" button to move to the Application Sites – Manage Site Entries page, which is described in Step 6: Application Sites – Manage Site Entries. The sites that were checked should be listed on the Manage Site Entries page.

Figure 10: Application Sites - Site Selection



Source: California Energy Commission, CalSHAPE Online System

Table 7: List of Icons on Application Sites – Site Selection

Icons	Name	Description
Add Checked Sites to Application	Add Checked Sites to Application	Add checked sites to application button brings the user to a new page with the selected sites as shown in Step 6: Application Sites - Manage Site Entries.
Application Main	Application Main	User returns to main page of application.
Include	Include	Use the include option to add the intended site in the application.
Cancel	Cancel	Cancel button allows user to go back to Manage Site Entries
Filter: CDS code or Site Name	Filter Bar	Use the filter option to search sites by name or CDS code. Partial text is acceptable.
Category All	Category	Use the category option to filter by funding category.
Eligible All	Eligible	Use the eligible option to filter by eligibility.
In Application All	In Application	Use the In Application option to filter sites by those that are already in an application and those that are not in the application.

Step 6: Application Sites - Manage Site Entries

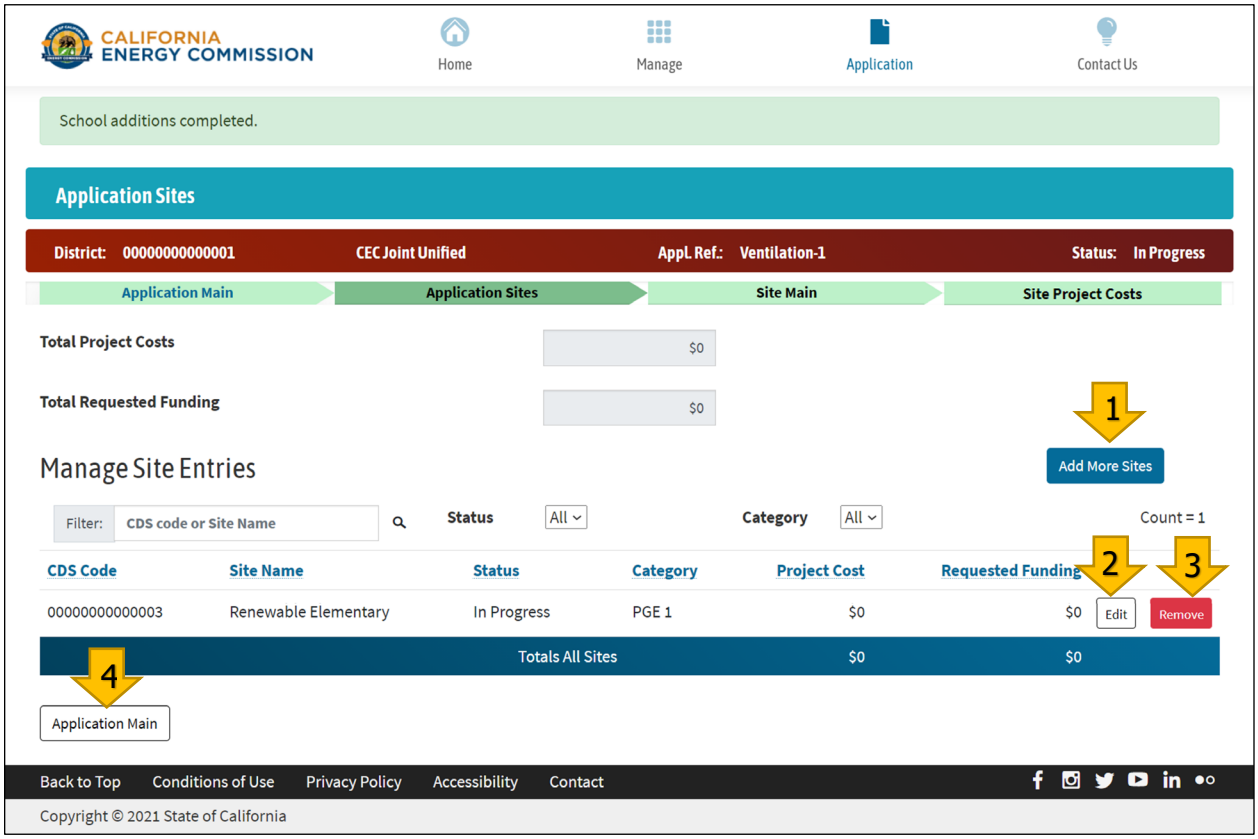
The Application Site – Manage Site Entries page shows a list of sites included in the application along with the sites specific application information including the application status, funding category, project cost, and requested funding. There is also an option to add additional sites to the application.

<u>Instructions</u>

1. If additional sites need to be added to the application, click the "Add More Sites" button to return to the Site Selection page, which is described in Step 5: Application Sites – Site Selection, above.

2. Click the "Edit" button next to each site listed under Manage Site Entries to move to the Site Main page to complete the application information for the site. This needs to be done for each site included in the application.
3. To remove the site from the application, click the "Remove" button. A box will appear to confirm that you are sure that you want to delete the site, click the "OK" button to continue with deleting the site from the application or click the "Cancel" button" to keep the site included on the application. If the "OK" button is clicked, the site will no longer be listed under Manage Site Entries.
4. This step is completed after information has been entered for all sites in the application and the status for each site is "Ready to Submit", as described in the Plumbing Application Instructions – Sites-Specific Pages, Step 1: Site Main, Instruction 5. Click the "Application Main" button to return to the Application Main page. The "Review & Submit Application" button on the Application Main page will now be enabled to proceed to Review and Submit Application page, as described in the Plumbing Application Instructions – Submit Application section.

Figure 11: Application Sites - Manage Site Entries



Source: California Energy Commission, CalSHAPE Online System

Table 8: List of Icons on Application Site – Manage Site Entries

Icons	Name	Description
Add More Schools	Add More Sites	Add more sites button takes user back to the application sites list in Step 5: Application Sites – Site Selection.
Edit	Edit	Use the edit button to continue with the application. Refer to Ventilation Application Instructions – Site-Specific Pages.
Remove	Remove	The remove button removes the site from the application.

Ventilation Application Instructions – Site-Specific Pages

Steps 1 and 2 provide instructions for the site-specific portion of the application. The steps also include List of Icons tables with information on the function of the buttons on each page.

Step 1: Site Main

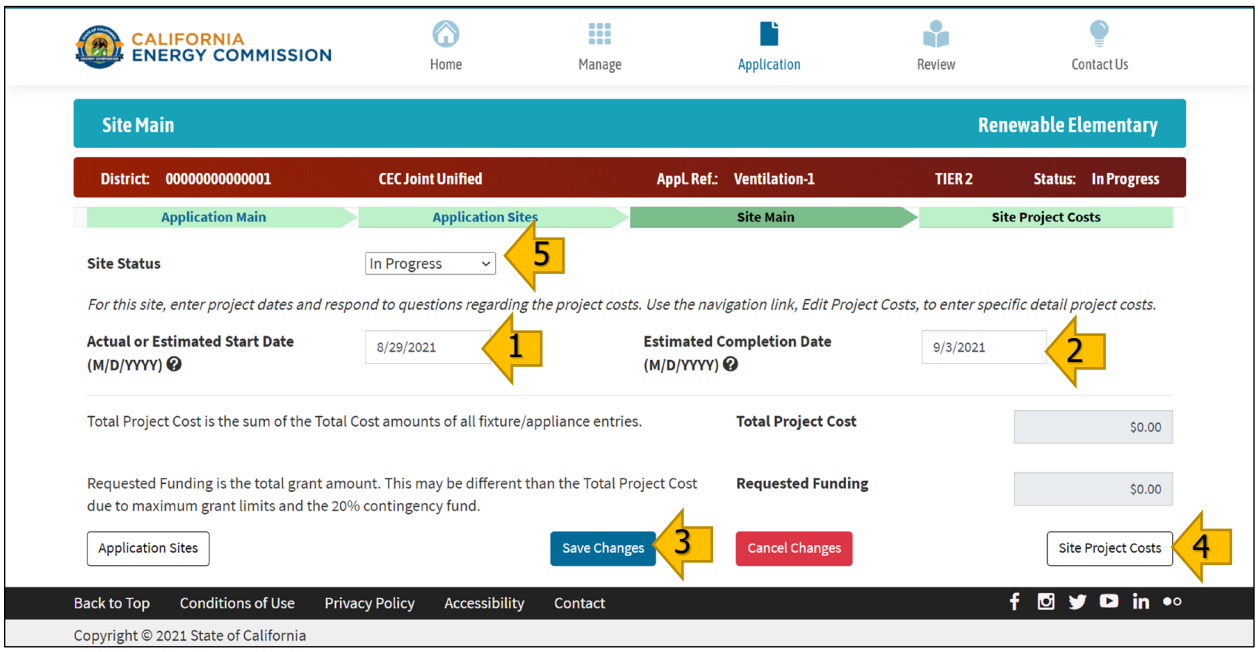
The Site Main page displays application information for a specific site. The Actual or Estimated Start and End dates for the project at the site are entered on this page. The Total Project Costs and Requested Funding amounts displayed on this page are summed from the information entered on the Site Replacement Costs page described in Step 2: Site Replacement Costs.

<u>Instructions</u>

1. Click on the box next to Actual or Estimated Start Date (M/D/YYYY). The box will be outlined in a blue highlight, and the project's actual or estimated start date can be typed in using the format M/D/YYYY or it can be selected from the calendar dropdown.
2. Click on the box next to Estimated Completion Date (M/D/YYYY). The box will be outlined in a blue highlight, and the project's estimated completion date can be typed in using the format M/D/YYYY or it can be selected from the calendar dropdown. Please note that the project term can only be up to 24 months.
3. Click on the "Save Changes" button to save the entered dates. Please note that this button must be clicked on before leaving the page or the dates will not be saved.
4. Click on the "Site Replacement Costs" button to continue completing the application on the Site Replacement Costs page, which is described in Step 2: Site Replacement Costs.

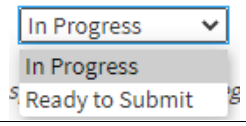
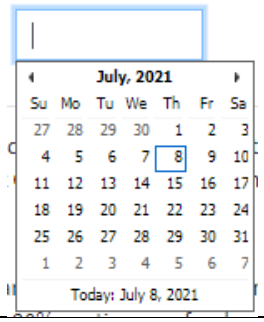
5. This step will be completed after pathway selection and project cost information are entered into the application for the site as described in Step 2: Site Replacement Costs. The Total Project Costs and Requested Funding are now displayed on this page. Click on the dropdown arrow in the box next to Site Status and select "Ready to Submit". Click the "Save Changes" button to save the updated Site Status.

Figure 12: Site Main



Source: California Energy Commission, CalSHAPE Online System

Table 9: List of Icons on Site Main

Icons	Name	Description
	Site Status	For each site, user is able to set the site status with the dropdown option.
	Actual/Estimated Start and Completion Date	Use the toggle to indicate the start and completion date of the project.
Application Sites	Application Sites	Application sites button allows user to go back to Step 1: Site Main
Site Project Costs	Site Project Costs	Site Project Costs button allows user to continue with the application in a new page.

Step 2: Site Project Costs

The Site Project Costs page is where the site specific contractor estimate information for the completion of the grant pathway process and requirements is provided.

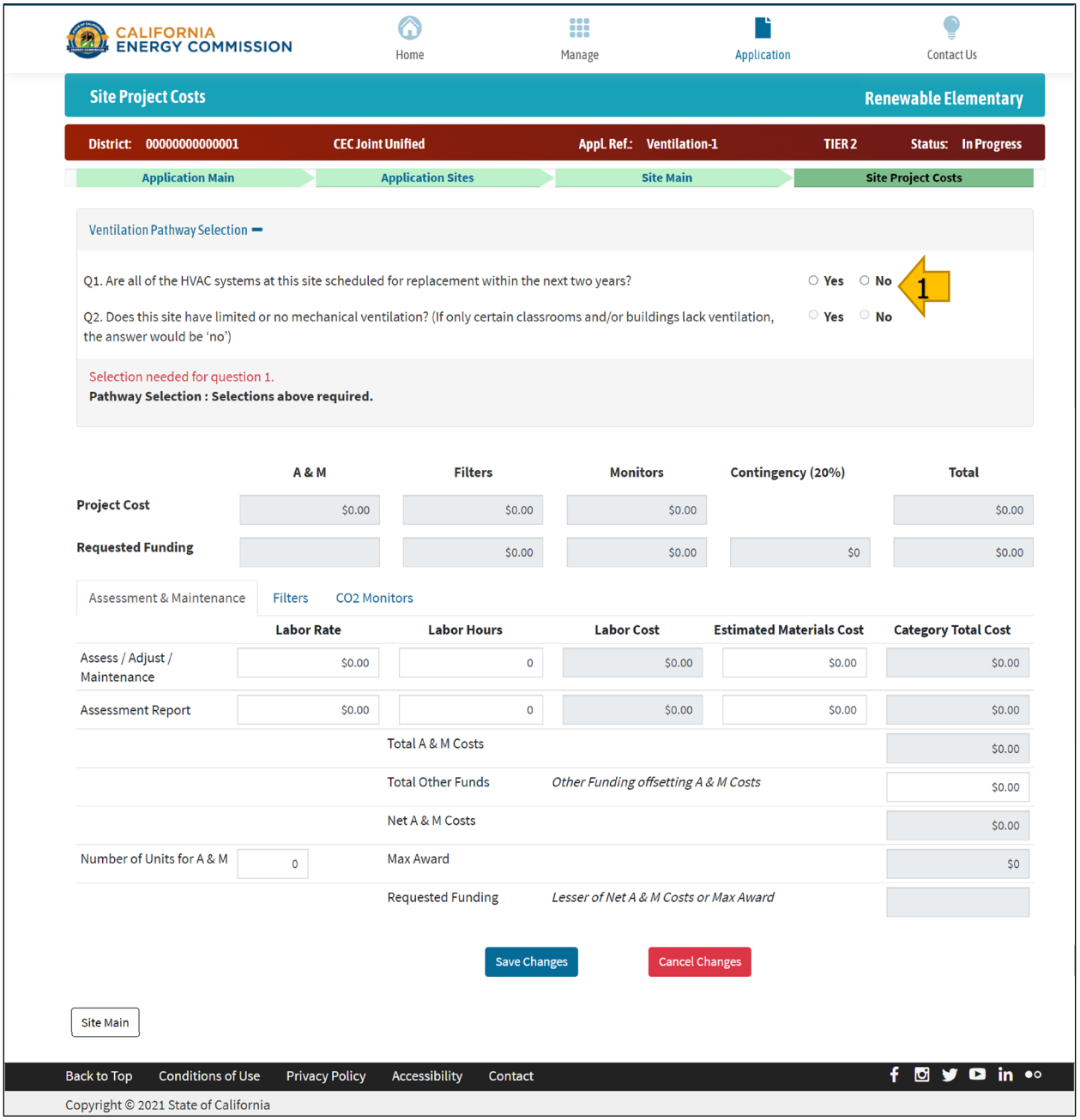
The information that must be provided is specific to the type of grant pathway. Separate instructions for Assessment and Maintenance (A&M), Filters, and CO_2 Monitors are provided below.

<u>Instructions</u>

1. Answer the following two questions under Ventilation Pathway Selection.
    a. "Are all of the HVAC systems at this site scheduled for replacement within the next two years?"
    b. "Does this site have limited or no mechanical ventilation? (If only certain classrooms and/or buildings lack ventilation, the answer would be 'no')"

Once completing questions on Ventilation Pathway Selection, the system will determine the pathway for each site.

Figure 13: Site Project Costs – Assessment and Maintenance



Source: California Energy Commission, CalSHAPE Online System

Table 10: Site Replacement Costs – Assessment and Maintenance

Icons	Name	Description
Site Main	Site Main	Site main button allows user to go back to site main page.

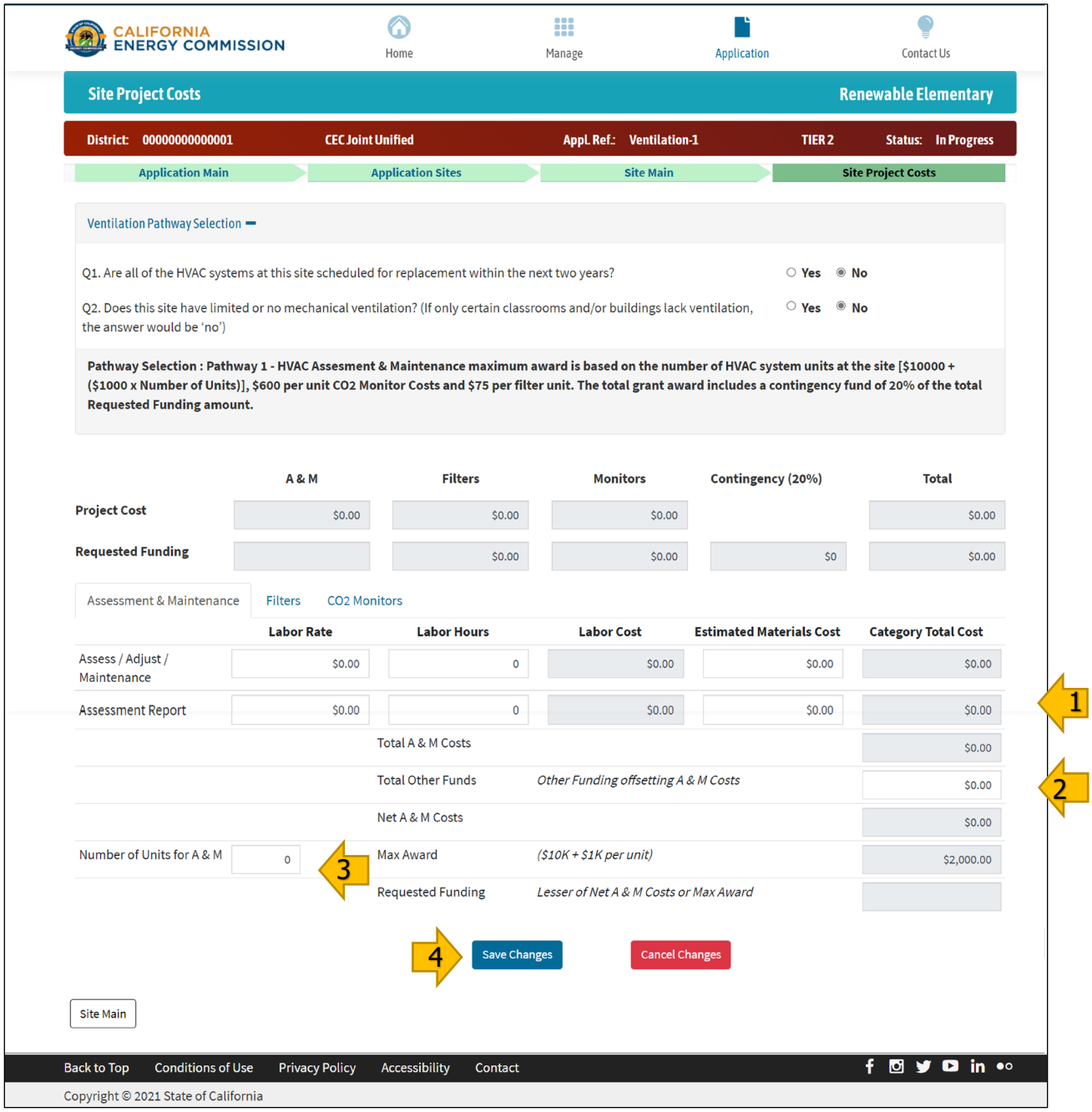
Pathway 1 – Heating Ventilation, and Air Conditioning (HVAC) Assessment and Maintenance Pathway Requirements

The HVAC Assessment and Maintenance Pathway requires HVAC Assessment and Maintenance, completion of an HVAC Assessment Report and HVAC Verification Report, and CO_2 monitor installation. Pathway 1 includes 20 percent of the request amount as a contingency fund for repairs, upgrades, or replacements.

<u>Instructions for Assessment and Maintenance (A&M)</u>

1. Enter information for Assess/Adjust/Maintenance and Assessment Report. The required information includes:
    a. Labor Rate
    b. Labor Hours
    c. Estimated Materials Costs
2. Include the amount of other funding offsetting A&M costs
3. Include the number of Units for A&M
4. Select Save Changes

Figure 14: Site Replacement Costs – Assessment and Maintenance



Source: California Energy Commission, CalSHAPE Online System

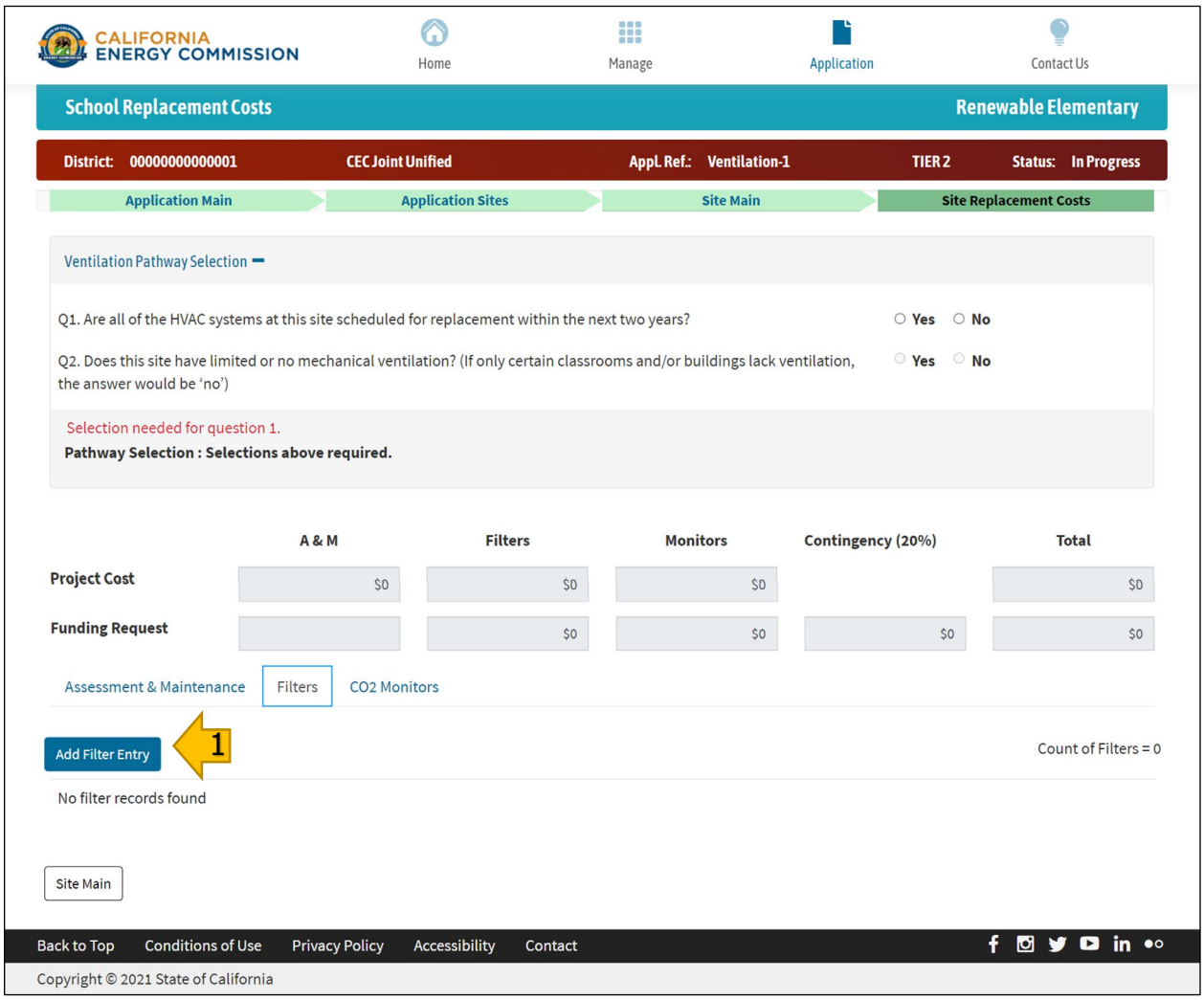
<u>Instructions for Filters</u>

1. Select the blue "Add Filter Entry" button
2. Select the MERV rating from the dropdown
3. Enter the cost information in the boxes provided. The required information includes:

a. Filter Count
b. Filter Unit Cost
c. Total Rebate Amount
d. Total Other Funds

4. Select Save when finished

Figure 15: Site Replacement Costs – Add Filter Entry

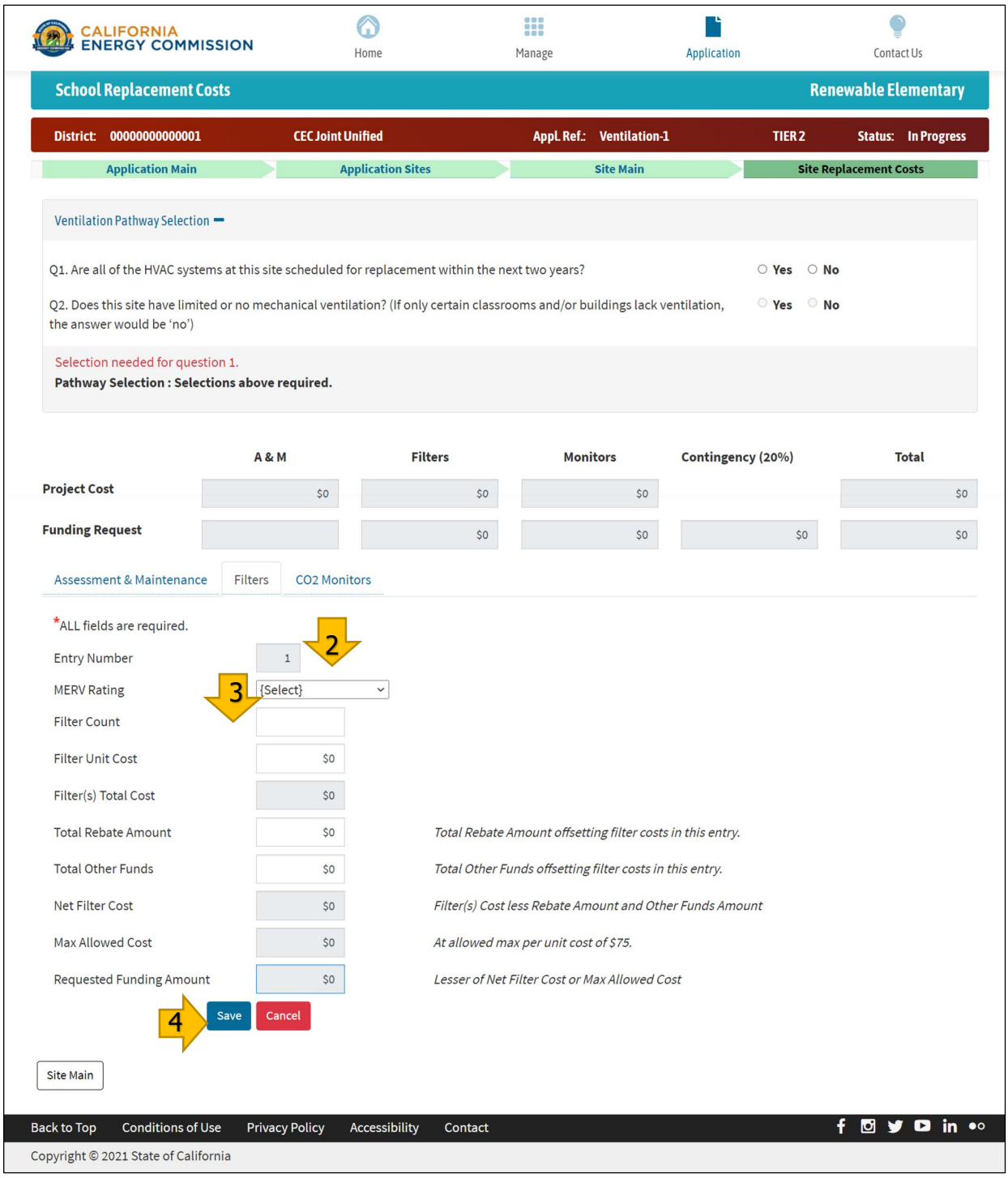


Source: California Energy Commission, CalSHAPE Online System

Table 11: Site Replacement Costs – Add Filter Entry

Icons	Name	Description
Add Filter Entry	Add Filter Entry	Add Filter Entry button allows user to input information for filter to the application.

Figure 16: Site Replacement Costs – Filters



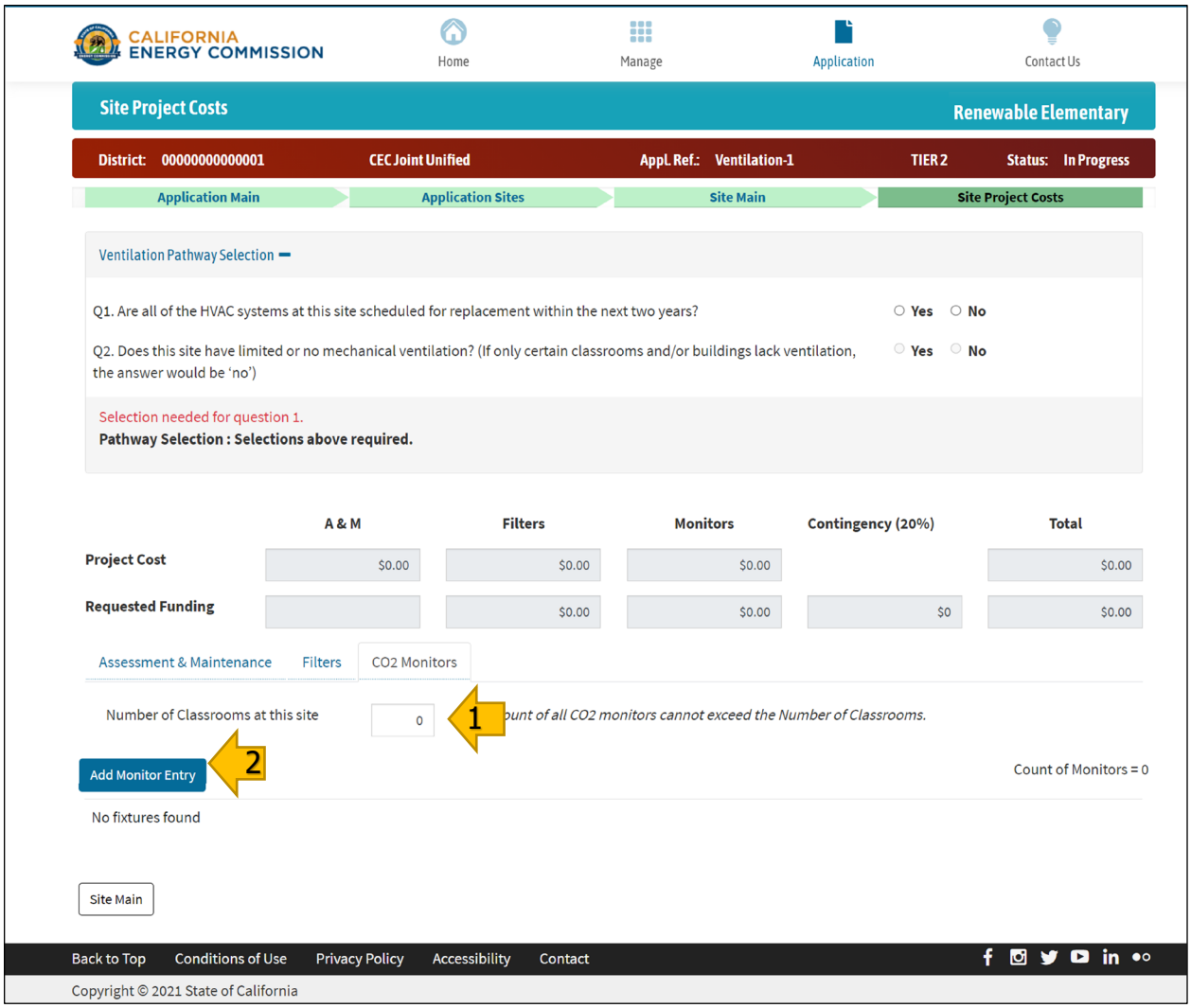
Source: California Energy Commission, CalSHAPE Online System

Instructions for CO_2 Monitors

1. Enter the number of classrooms at the site.

2. Select the blue "Add Monitor Entry" button
3. Enter information for new CO_2 monitors. The required information includes:
    a. Manufacture
    b. Brand Name
    c. Model
4. Enter the cost information in the boxes provided. The required information includes:
    a. CO_2 Monitor Count
    b. CO_2 Monitor Unit Cost
    c. Total Rebate Amount
    d. Total Other Funds
5. Select Save when finished

Figure 17: Site Replacement Costs – Add CO_2 Monitors

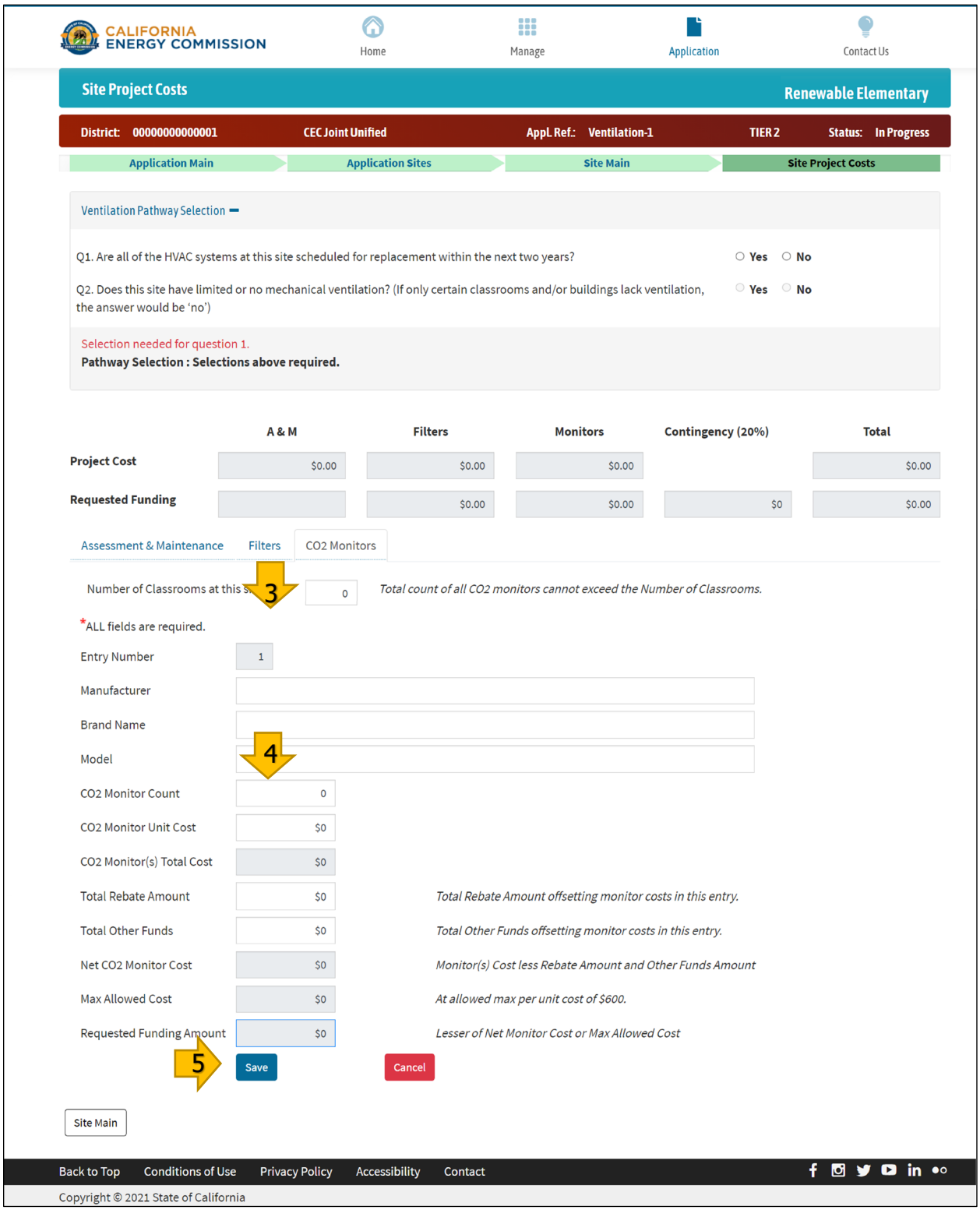


Source: California Energy Commission, CalSHAPE Online System

Table 12: Site Replacement Costs – Add CO_2 Monitors

Icons	Name	Description
Add Monitor Entry	Add Monitor Entry	Add Monitory Entry button allows user to input information for CO_2 Monitors to the application.

Figure 18: Site Replacement Costs – CO_2 Monitors



Source: California Energy Commission, CalSHAPE Online System

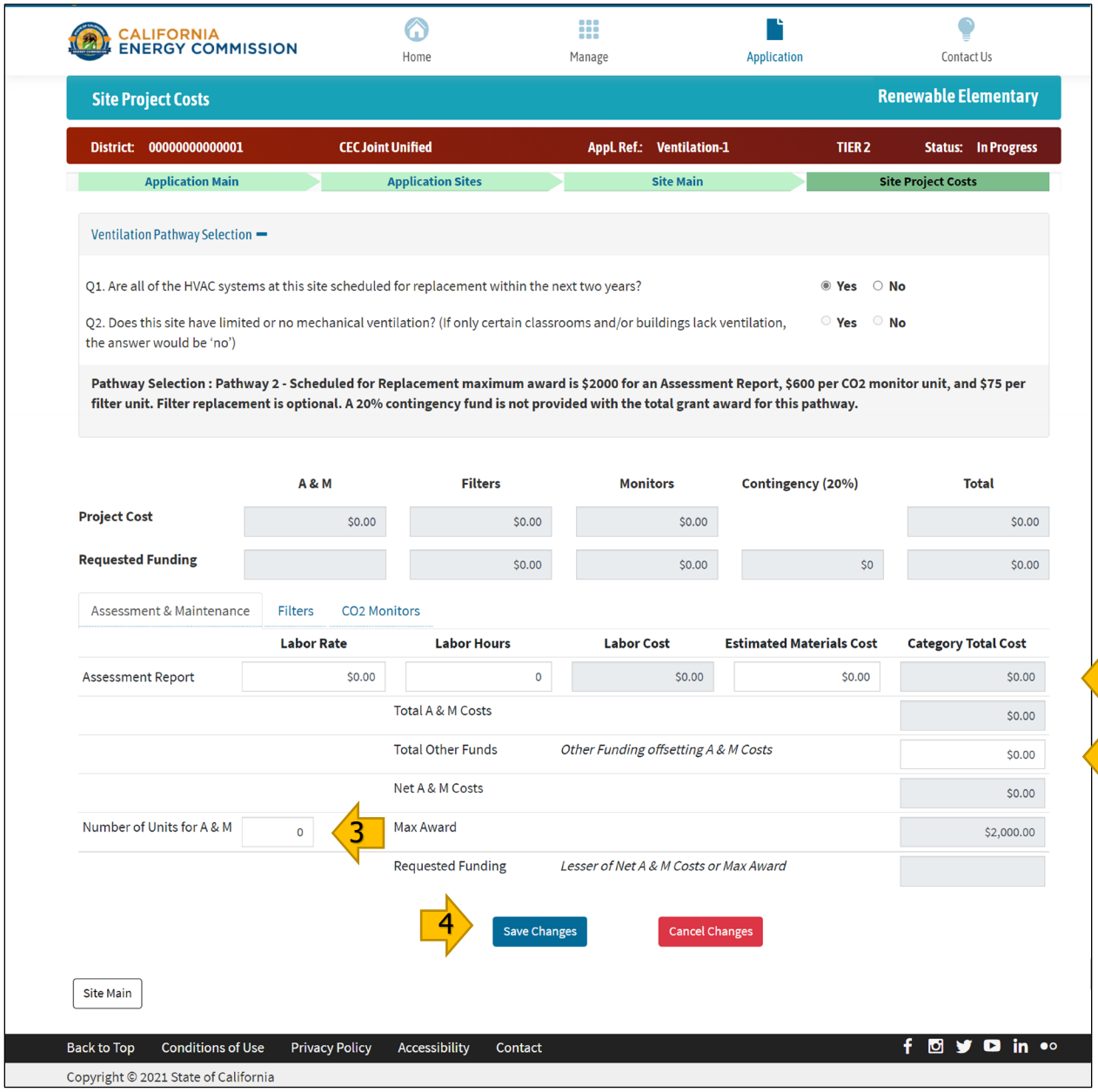
Pathway 2 – Scheduled for Replacement Pathway Requirements

The Scheduled for Replacement Pathway allows filter replacement and requires the installation of CO_2 monitors in each classroom and completion of an HVAC Assessment Report and an HVAC Verification Report. Instructions for CO_2 Monitors and Filters are provided above under Pathway 1.

<u>Instructions for Assessment and Maintenance (A&M)</u>

1. Enter information for Assessment Report. The required information includes:
    a. Labor Rate
    b. Labor Hours
    c. Estimated Materials Costs
2. Include the amount of other funding offsetting A&M costs
3. Include the number of Units for A&M
4. Select Save Changes

Figure 19: Site Replacement Costs – Assessment and Maintenance



Source: California Energy Commission, CalSHAPE Online System

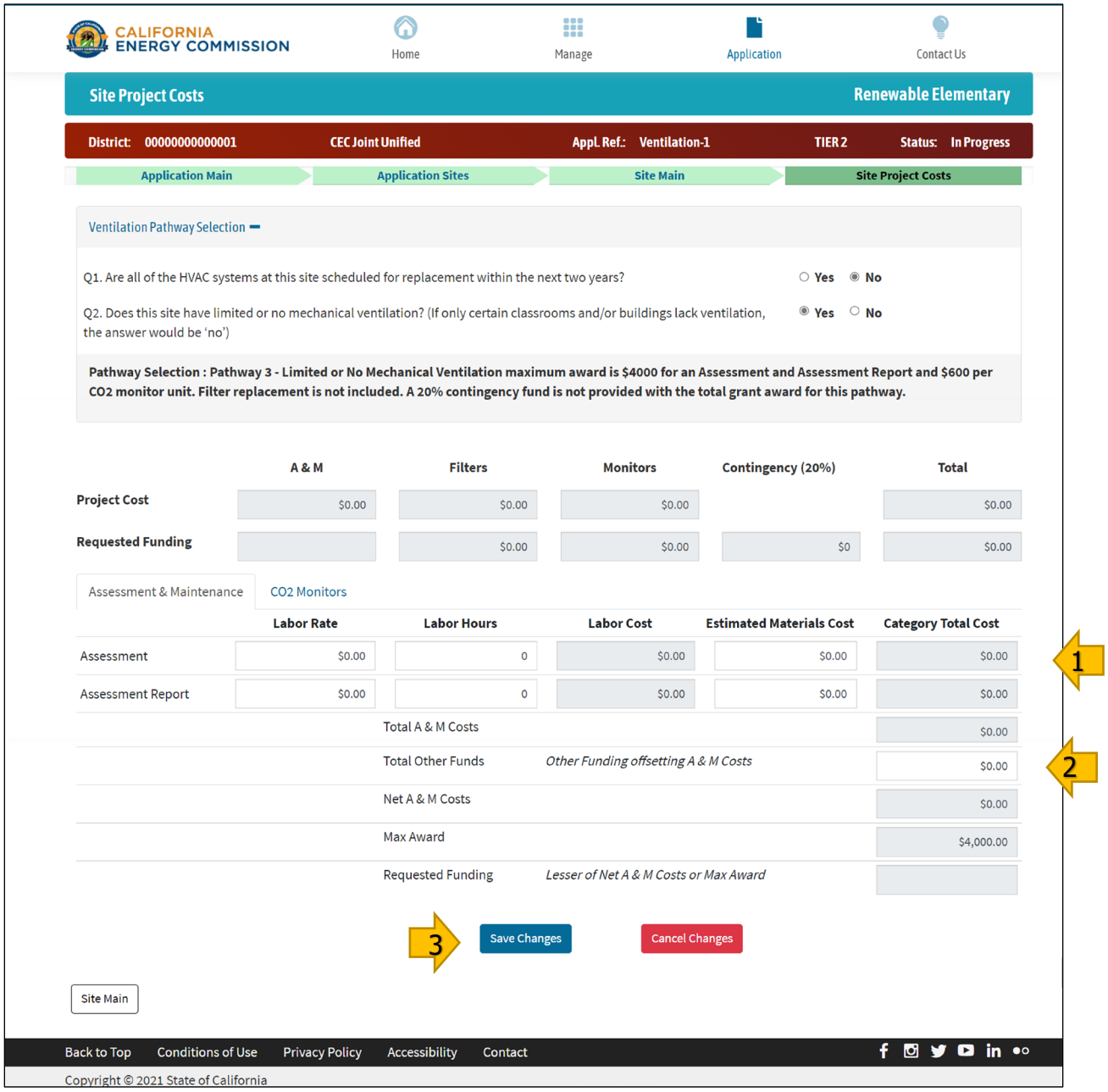
Pathway 3 – Limited or No Mechanical Ventilation Pathway Requirements

The Limited or No Mechanical Ventilation Pathway requires an assessment, completion of an HVAC Assessment Report, installation of CO_2 monitors in each classroom, and a completion of an HVAC Verification Report. Instructions for CO_2 Monitors are provided above under Pathway 1. Please note, filters are not eligible for this pathway.

<u>Instructions for Assessment and Maintenance (A&M)</u>

1. Enter information for Assessment and Assessment Report. The required information includes:
    a. Labor Rate
    b. Labor Hours
    c. Estimated Materials Costs
2. Include the amount of other funding offsetting A&M costs
3. Select Save Changes

Figure 20: Site Replacement Costs – Assessment and Maintenance



Source: California Energy Commission, CalSHAPE Online System

Ventilation Application Instructions – Submit Application

Instructions for the review and submittal of the application are provided in Step 1. The step also includes a List of Icons table with information on the function of the buttons on the page.

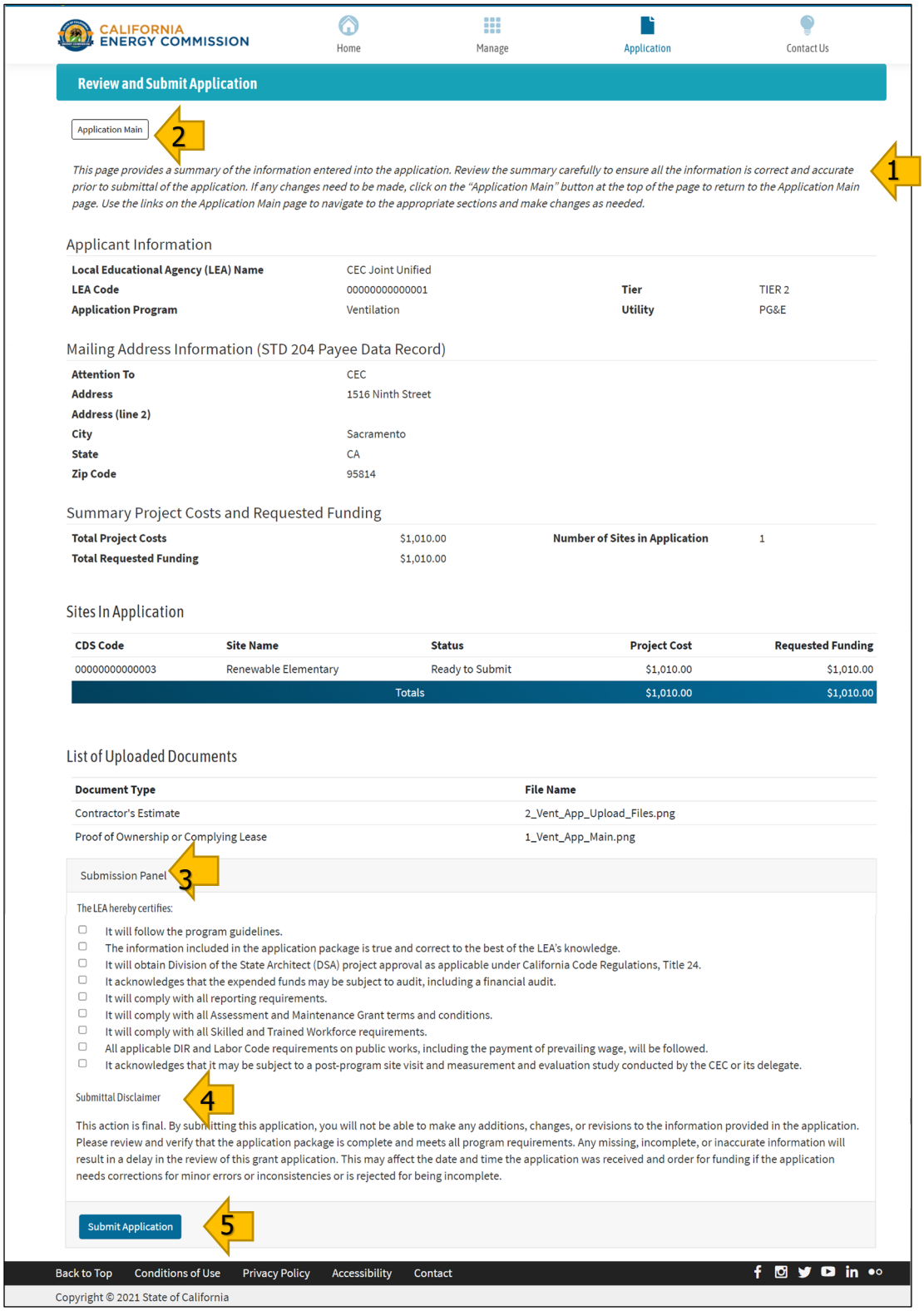
Step 1: Application Review and Submittal

The Review and Submit Application page will display a summary page of the application for a final review by the user before the application is submitted.

Instructions

1. Review application summary to confirm that the information entered into the application is complete and accurate.
2. If any of the information needs to be changed, click on the "Application Main" button at the top of the screen to return to the Application Main page. Navigate to the applicable page to make the needed change. After the change is made, return to the Review and Submit Application page and re-review the application summary to ensure that all the information provided is complete and accurate.
3. Read the self-certifications listed in the Submission Panel. Check the box next to each self-certification to confirm that the LEA accepts the self-certification.
4. Read the Submittal Disclaimer. After the "Submit Application" button is clicked on and the application is submitted, no additional changes to the application will be allowed.
5. After the user has confirmed accuracy of the application summary and indicated acceptance of the self-certifications, click on the "Submit Application" button to submit the application.
6. A confirmation message which states "Application has been successfully submitted. You will receive a confirmation email." will appear in green at the top of the page. The users with access to the LEA's application will receive an email with a confirmation that the application has been submitted and important information about the next steps of the application process.

Figure 21: Review and Submit Application



Source: California Energy Commission, CalSHAPE Online System

Table 13: Review and Submit Application

Icons	Name	Description
Submit Application	Submit Application	User is able to submit the application on this page.

Contact Us

For any questions regarding the system or the application for the CalSHAPE Plumbing Program, please contact CalSHAPE@energy.ca.gov.