Step 1: Logging In

- The CalSHAPE Online System is available at calshape.energy.ca.gov. Click “Log In” to begin.
• Enter the account email address and password into the boxes and click “Log In”
Step 2: Accessing Your Application

• Select the Application icon located at the top of your screen
Step 3: Managing Your Application

• Select the “LEA Dashboard” Icon on the right side of the screen
Step 4: Starting Your Application

- Select the blue “New” icon at the top of the Plumbing section
Step 5: Mailing Address Info

- First, fill out the highlighted address fields for the LEA applying for program funds
- Use address that will be used for Form STD204
- Click blue “Save Changes” button
Step 6: Upload Supporting Docs

- To upload documents, begin by clicking “Upload Supporting Documents”
Step 6: Upload Supporting Docs Cont’d

- Click the “Select File” icon located on the left side of the screen to choose files from your computer to upload
Step 6: Upload Supporting Docs Cont’d

- Click the “Upload” button once you have selected your files. You may select multiple files and upload them all at once.
Step 6: Upload Supporting Docs Cont’d

• Once uploaded, your documents will appear in the Supporting Documents table. Label each document using the “Document Type” drop-down menu.

• Click your browser’s back button once you’re finished to return to the Application Main page.
Step 7: Managing Sites

- Click the “Application Sites” button located at the bottom right of the screen
Step 7: Managing Sites Cont’d

- Select the schools you wish to include in your application by selecting the check boxes next to each school. Once you have selected the desired boxes, click the “Add Checked Schools to Application” button at the bottom of the screen.
Step 8: Editing School Info

- Once sites are added, you will see a confirmation message at the top of the screen
- Select a site by clicking the “Edit” button
Step 9: Start and Completion Dates

- Input the Actual/Estimated Start Date and Estimated Completion Date
- Click “Save Changes” button when complete
Step 10: Adding Fixture/Appliance Entries

- Select which type of fixture you would like to add
- Click the “Add Fixture/Appliance Entry” button on the left side of the screen
Step 10: Adding Fixture/Appliance Entries Cont’d

• Fill out every field for the fixture and click “Save” button at the bottom of the screen

• Repeat process for each fixture as needed
Step 11: Site Status Change

- Once you have finished editing costs and dates for a school, change the school status from In Progress to Ready to Submit using the dropdown menu and click “Save Changes”. Click “Application Sites” to continue.
Step 12: Additional Schools

- On the Application Sites page:
  - Click “Add More Schools” to add additional schools and repeat fixture entry process as needed
  - If all schools have been added, click “Application Main” to return to Application Main page
Step 13: Submitting Application

- Once all schools have been added and all documents uploaded, click “Review and Submit” to submit your application.
Step 14: Self Certification

Next, the system will display all basic information from your application to allow you to review for accuracy and completion.
Step 14: Self Certification Cont’d

- Check each box next to the list of self-certifications to attest that all information contained in the application is accurate and the application complies w/ Guidelines.
- Check each box and click “Submit Application” to complete application process.
Step 15: Submitted

- Once submitted, you will not be able to edit any information in application
- Can add a note for the application reviewer if needed
- You will receive a system email confirming your application was submitted
Step 16: Next Steps & Corrections

- Now you can view your application’s status on the **Application Main** page. Be sure to check in on the status of your application regularly.
Step 16: Next Steps & Corrections

- If CalSHAPE staff has questions about submitted information, or if an error was made, staff may request corrections via email
- Only changes specified in the List of Corrections Needed table are allowed
- After all corrections have been made, resubmit application for staff review

### List of Corrections Needed

<table>
<thead>
<tr>
<th>CDS Code</th>
<th>Site</th>
<th>Correction(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>[CDS Code]</td>
<td>[Site]</td>
<td></td>
</tr>
</tbody>
</table>
Resources

- CalSHAPE Interactive GIS Map
- CalSHAPE Program Companion Documents
- CalSHAPE Worksheets

Contact Us: CalSHAPE@energy.ca.gov
Thank You!