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California Schools Healthy Air, Plumbing, and Efficiency Online System

CalSHAPE Plumbing Program Incurred Cost Invoicing Companion Document

June 2022



CalSHAPE Online System CalSHAPE Plumbing Program Incurred Cost Companion Document

The California Energy Commission administers the California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Program. 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, incurred costs documents, and final reporting packages for the two CalSHAPE grant programs: CalSHAPE Ventilation Program and CalSHAPE Plumbing Program.

The CalSHAPE Plumbing Program Incurred Cost Companion Document provides instructions to submit documents and invoices for the CalSHAPE Plumbing Program. An LEA may receive reimbursement of incurred costs of up to 50 percent of the grant award and may submit up to four incurred cost requests for each grant agreement. According to Chapter 3, Section H of the CalSHAPE Plumbing Program Guidelines, Second Edition (guidelines), "Documentation of incurred costs must provide site-specific information and be itemized to show both the material and labor costs for each plumbing fixture and appliance replacement listed in the grant agreement. In addition, documentation of incurred costs must establish that all work performed complies with any applicable skilled and trained workforce and other labor requirements." The companion document also includes general information on navigating the system.

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

A user must have an account in the system to upload documents and invoices for a Plumbing Incurred Cost request. 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 Plumbing Program information or requirements. CalSHAPE Plumbing Program information and requirements are provided in the guidelines, found on the CalSHAPE Program webpage at <https://www.energy.ca.gov/publications/2022/california-schools-healthy-air-plumbing-and-efficiency-plumbing-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 change from white to black when the maximum number applications is reached.
 - 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.

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 pages:
 - 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 backward navigation option.

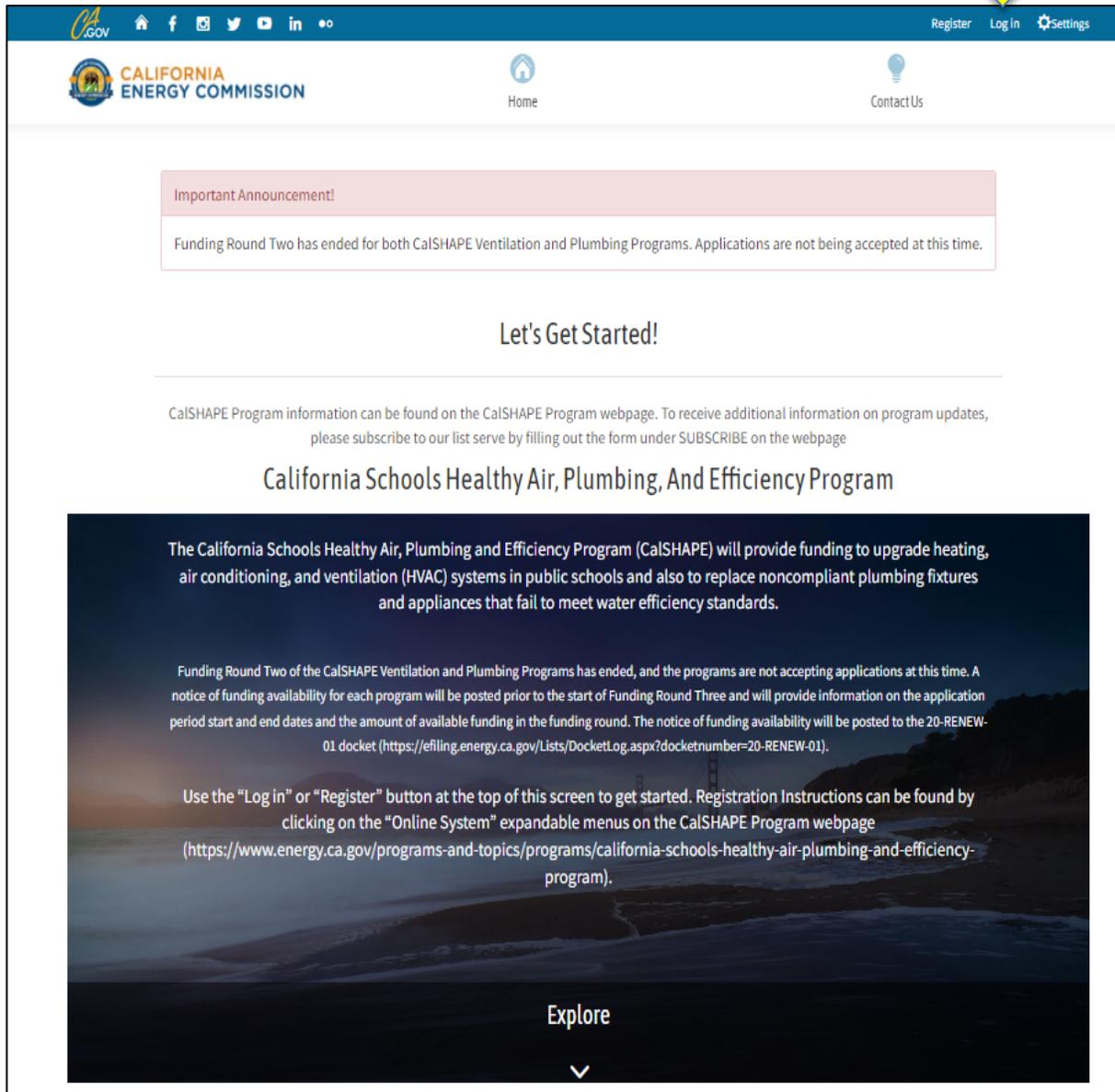
Upload Incurred Cost Instructions

Step 1: CalSHAPE Online System Homepage

Instructions

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

Figure 1: CalSHAPE Online Login Page



Source: California Energy Commission, CalSHAPE Online System

Step 2: Application Homepage

Figure 2: LEA Dashboard Button

Application Homepage

Add Additional LEAs

LEA Code:

LEA Contact(s)	Total	Underserved
LEA Administrator has not registered.	1	1

Applications

Ventilation Plumbing

In Progress	0	0
Submitted	0	0
Awarded	1	1

LEA Dashboard

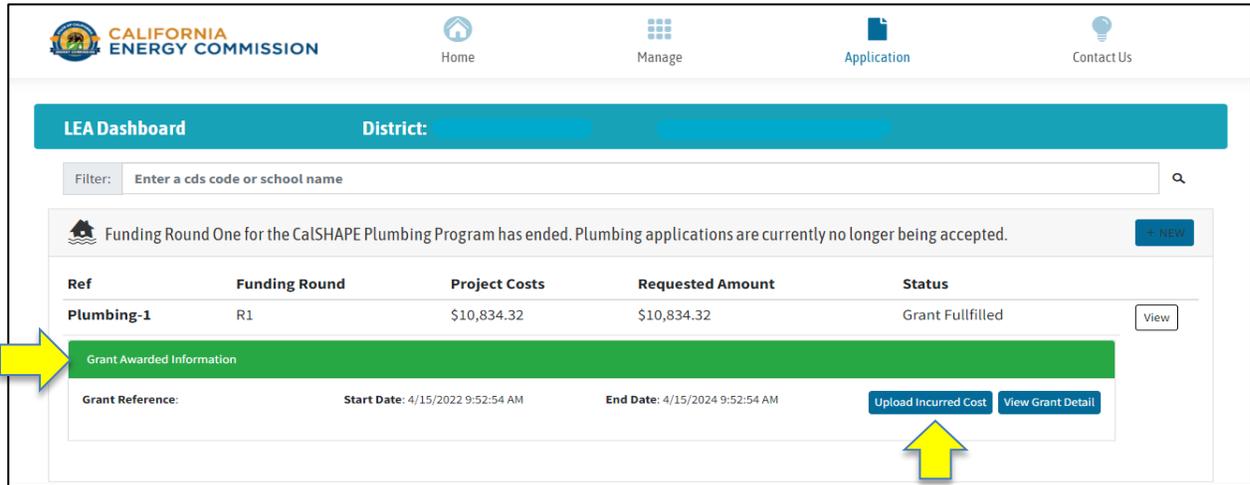
Source: California Energy Commission, CalSHAPE Online System

Instructions:

1. Click on the "Application" icon to navigate the "Application Homepage."
2. Locate the name and LEA code of the plumbing application you are requesting an incurred cost for and click the "LEA Dashboard" button.

Step 3: LEA Dashboard

Figure 3: Upload Incurred Cost Button

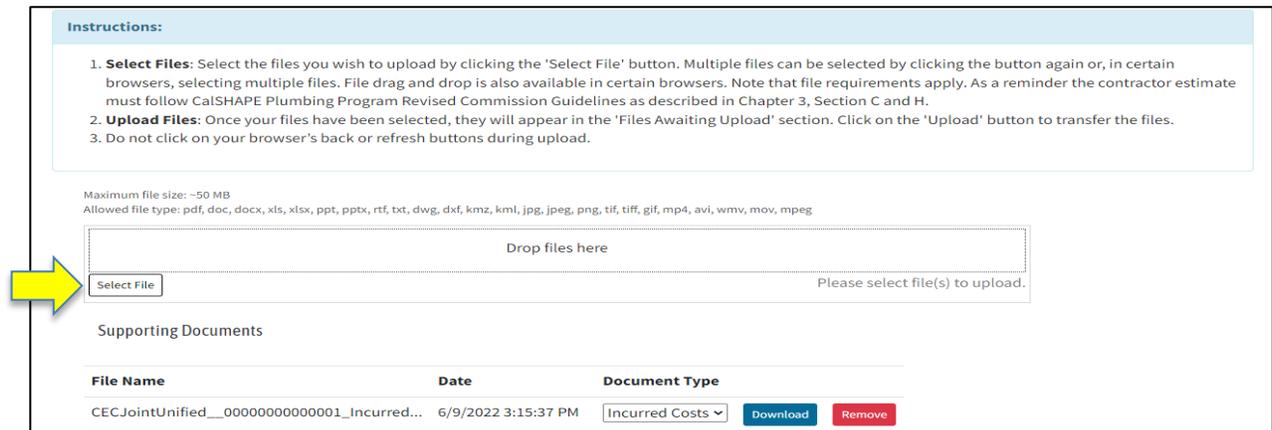


Source: California Energy Commission, CalSHAPE Online System

Instructions:

1. Under the Plumbing Application section, locate the green "Grant Awarded Information" box and click on "Upload Incurred Cost" button.
2. Use the following file naming format for each document that will be uploaded: "GrantAgreementNumber_IncurredCost#." (Ex. 21R1PA0000_IncurredCost1, 21R1PA0000_IncurredCost2, and 21R1PA0000_IncurredCost3)
3. Follow the instructions written above the "Select File" button on how to properly upload documents and invoices.

Figure 4: Select File and Upload



Source: California Energy Commission, CalSHAPE Online System

What's Next?

CEC staff will review all submitted Plumbing Program Incurred Cost documents. If there are any corrections found during the incurred cost review, the LEA will be sent an email containing the list of items that will need to be corrected and resubmitted. If there are no corrections needed, the incurred cost request will be invoiced, and the LEA will be notified that a payment has been scheduled by the California Energy Commission. The email will contain the invoice number and the payment amount.

Contact Us

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