California Energy Commission

California Schools Healthy Air, Plumbing, and Efficiency Online System

Plumbing Reconciliation Companion Document

April 2025

Plumbing Reconciliation
Companion Document

The California Energy Commission administers the California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Program. The CalSHAPE Plumbing Program requires that final documentation be submitted to the online system. After the project has been completed, the grantee must submit a "Final Document and Invoice for Remaining Funds" or Reconciliation (CalSHAPE Plumbing Program Guidelines, Chapter 4).

The Plumbing Reconciliation Companion Document provides step-by-step instructions on how to complete the Reconciliation. The instructions also include general information and tips on navigating the reporting tool.

The CalSHAPE Online System (system) can be accessed at https://calshape.energy.ca.gov/.

A user must have an account in the system to input information. 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 in the completion of the reconciliation process. It does not include CalSHAPE Plumbing Program information or requirements. CalSHAPE Plumbing Program information and requirements are provided in the CalSHAPE Plumbing Program Guidelines, found on the CalSHAPE Program webpage at https://www.energy.ca.gov/publications/2022/california-schools-healthy-air-plumbing-and-efficiency-ventilation-program.

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General Information and Navigation

Multiple Users:
- Multiple users can have access to Reconciliation at the same time. A user can overwrite another user's information based on the most recently saved information in the system.

Reconciliation Navigation:
- Navigation buttons are found throughout Reconciliation process:
  - Internet browser navigation buttons are also an option for use.
  - Please note, some internet browsers have the backspace button as a backward navigation option.

Required Fields:
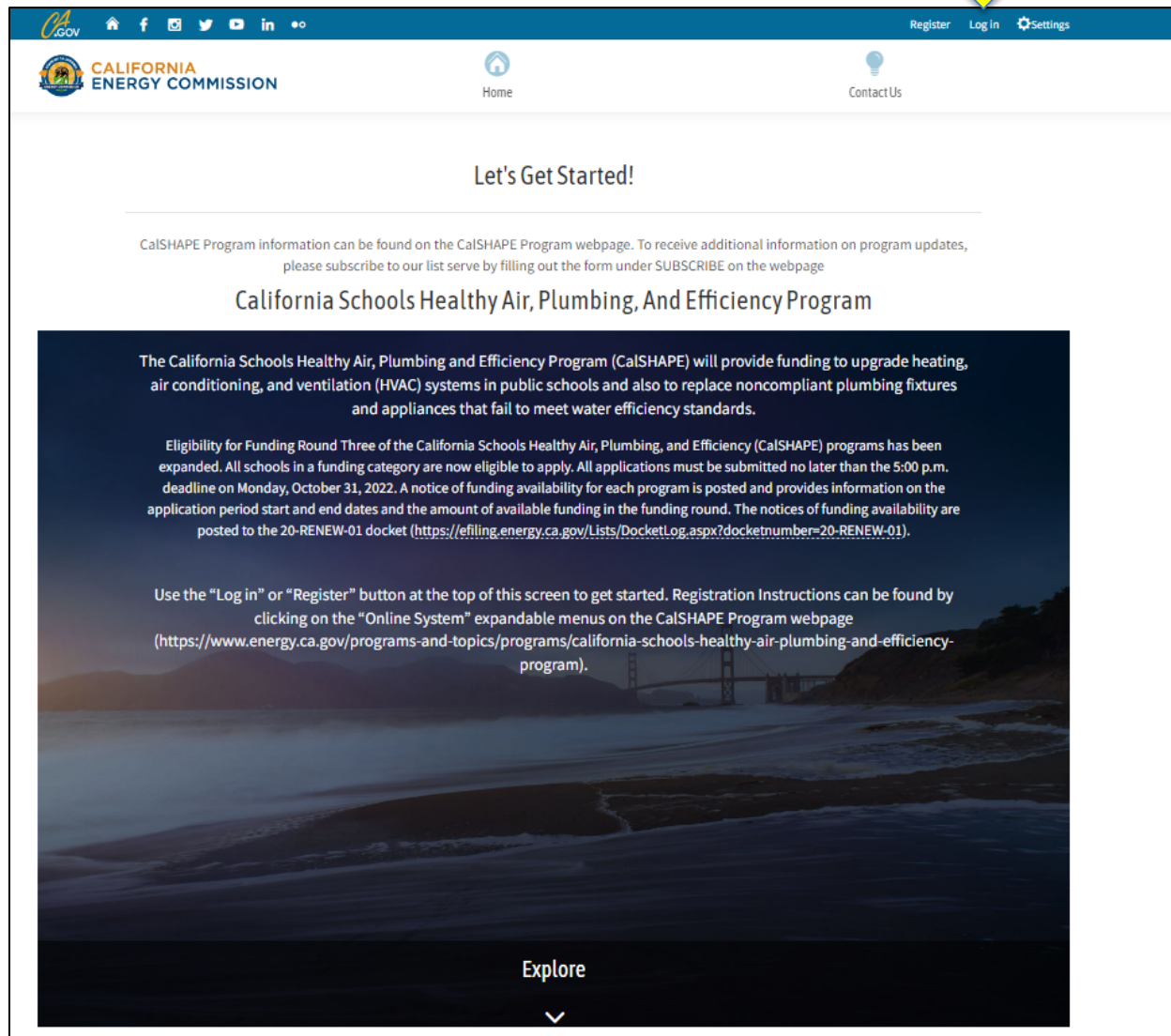- All required fields must be filled out to save the section.

Upload Files Button:
- Upload file button is used for any documents, pictures, or any required materials needed for Reconciliation.
  - This could be any invoices or receipts

Locating the Reconciliation Button

Step 1: CalSHAPE Online System Homepage

Figure 1: CalSHAPE Online Login Page

Source: California Energy Commission, CalSHAPE Online System

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

Step 2: Application Homepage

Figure 2: LEA Dashboard

Source: California Energy Commission, CalSHAPE Online System

Instructions:
1. Click on the "Application" icon to navigate the "Application Homepage" shown in Figure 2.
2. Locate the Applications section for LEAs that will start Reconciliation and click the "LEA Dashboard" button.
3. Under the Plumbing section on the LEA Dashboard, locate the green "Grant Awarded Information" box and click on the "View Grant Detail" button.

Figure 3: Grant Summary - Reporting Button

Source: California Energy Commission, CalSHAPE Online System

Instructions:
1. To start the reconciliation process, click on the "Reporting" button.
2. Locate the site name and click on the "Reconciliation" button.

Reconciliation

Figure 4: Fixture/Appliance Entry Page

☐ **Exclude this site from the grant, grant reimbursement funds, and further completion processes.**

Note: If Excluded, further edits to the reconciliation data may be made for the site, however this site will not be included for determining overall grant reporting status or grant reimbursement amounts.

Grant Reporting Status: Reconciliation In Progress

Requested Funding	$26,270.00
Actual Project Cost	$34,382.00
Reimbursement Amount	$26,270.00 *Lesser of Requested Funding or Actual Project Cost*

- Original fixture records cannot be deleted.
- Unit count for a fixture type cannot exceed the original count, so to add a record for existing fixture type first reduce the count on a current record.
- Fixture unit count can be reduced to zero (0) as a method of removing an original record.

Fixture/Appliance Type { Select fixture / appliance } ▼   [Add Fixture/Appliance Entry]   Entry count = 3

Entry	Type	Model	Manufacturer	Brand Name	Unit Count	Fixture Cost		
1	Interior Faucet	Z86500-XL	Zurn	Zurn	5	$18,000.00	Edit	Delete
2	Toilet	FloWise	American Standard	Madera	3	$7,002.00	Edit	Delete
3	Automatic Ice Maker	UN324W-1A	Scotsman Ice Systems	Scotsman	1	$9,380.00	Edit	Delete
					Total	**$34,382.00**		

[Grant Reporting]

Source: California Energy Commission, CalSHAPE Online System

Instructions:
1. If you do not intend to include a site in the Reconciliation process, click on the checkbox that states "Exclude this site from the grant, grant reimbursement funds, and further completion process."
2. Follow instructions on the "Reconciliation of Site Replacement Costs" page.
   a. Grayed out boxes cannot be edited.
   b. Entries provided during the application process cannot be deleted but can be edited.
   c. To update "Fixture Cost" column, click the "Edit" button.

Figure 5: Reconciliation of Site Replacement Costs

Source: California Energy Commission, CalSHAPE Online System

Instructions:

1. The "Replaced" section to the left of the page is the original entry during the application process and cannot be edited.

2. The "Installed" section to the right of the page can be edited and filled out with the new Fixture/Appliance that was installed.
   a. Enter all required information below the "Installed" section.
   b. Click the "Fixture/Appliance List" to go back.
3. Click "Save."

Figure 6: Fixture/Appliance Entry Page

☐ **Exclude this site from the grant, grant reimbursement funds, and further completion processes.**

Note: If Excluded, further edits to the reconciliation data may be made for the site, however this site will not be included for determining overall grant reporting status or grant reimbursement amounts.

Grant Reporting Status: Reconciliation In Progress

Requested Funding	$26,270.00	
Actual Project Cost	$34,382.00	
Reimbursement Amount	$26,270.00	Lesser of Requested Funding or Actual Project Cost

- Original fixture records cannot be deleted.
- Unit count for a fixture type cannot exceed the original count, so to add a record for existing fixture type first reduce the count on a current record.
- Fixture unit count can be reduced to zero (0) as a method of removing an original record.

Fixture/Appliance Type { Select fixture / appliance } ▼   **Add Fixture/Appliance Entry**   Entry count = 3

Entry	Type	Model	Manufacturer	Brand Name	Unit Count	Fixture Cost		
1	Interior Faucet	Z86500-XL	Zurn	Zurn	5	$18,000.00	Edit	Delete
2	Toilet	FloWise	American Standard	Madera	3	$7,002.00	Edit	Delete
3	Automatic Ice Maker	UN324W-1A	Scotsman Ice Systems	Scotsman	1	$9,380.00	Edit	Delete
				Total		$34,382.00		

* ALL fields are required. Use the 'Unknown' checkbox, if relevant.

Entry Number [4]

Fixture/Appliance Type [Interior Faucet]

	Installed
Manufacturer	
Brand Name	
Model	
Water Usage (gallons per minute)	
Unit Count	0

Source: California Energy Commission, CalSHAPE Online System

Instructions:

1. The Unit Count can be reduced to zero as a method of removing an original record and a new entry can be added by clicking on the "Add Fixture/Appliance Entry" button.
   a. Enter all required information below the "Installed" section.
2. Click "Save."
   a. New entry added to the Fixture/Appliance Entry Page.
3. Click "Grant Reporting" button at the bottom of the page.

Figure 7: Grant Reporting

Source: California Energy Commission, CalSHAPE Online System

Instructions:

1. If fixture and appliance entries and updates are complete, click on the "Upload Reconciliation Files" button and upload any supporting documents, invoices, and receipts.
   a. Required documents include final invoices, a site-specific project summary of expenses, and documentation or proof of all applicable licenses for the skilled and trained workforce.
   b. Workforce requirements can be verified by providing photos or scans of licenses, as well as evidence of certification from the Department of Industrial Relations Division of Apprenticeship Standards.
2. Click on the check box to indicate that the reconciliation data has been entered and is ready to be submitted.
3. Click on the "Reconciliation Next Steps" button to proceed.

Figure 9: Self Certification

Source: California Energy Commission, CalSHAPE Online System

Instructions:

1. Enter the number of jobs created/added into the workforce to complete the project. If none, enter zero (0).
2. Check all boxes in the "Self Certification" section.
3. Click the "Submit Reconciliation & Verification & Certification" button to submit Reconciliation.

Contact Us

For any questions regarding the Reconciliation, please contact CalSHAPE@energy.ca.gov.