



**Climate Smart  
Communities**

# Certification Application User Guide

<https://climatesmart.ny.gov>

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## 1. Overview

Climate Smart Communities (CSC) is a voluntary New York State program that helps local governments take action to reduce greenhouse gas emissions and adapt to a changing climate. The program offers technical assistance, grants, and rebates for electric vehicles. Learn more online: <https://climatesmart.ny.gov/>

The purpose of this document is to provide communities with instructions on how to complete a certification application through the online CSC certification portal website.

### 1.2 Program Participation

Communities can pass the CSC pledge as a municipal resolution to join the program and become a Registered Climate Smart Community. After the resolution is adopted, designate a primary contact person to [sign up for a portal account](#), complete the online registration form, and upload the adopted municipal resolution. After your registration is reviewed, your primary contact person will receive an email with information on how to access your account on the CSC certification portal.

After becoming a Registered CSC, communities can implement certification actions at their own pace. There is no time limit between adoption of the pledge and commencement of the certification process.

Once you identify your selected actions, review the requirements for each action and begin organizing your documentation. You will upload documentation, complete the application, and submit the application all using the online portal website.

More details on how to participate, sign up for a portal account, and when to submit your application can be found here: <https://climatesmart.ny.gov/actions-certification/getting-started/>

### 1.3 Preparing Your Application

Participating communities must prepare and submit their application for certification through the CSC online application portal using the municipal dashboard. To begin, access your account through the CSC portal website



From here, you will have the option to either log in (for existing users) or create a new individual user account (for first-time users).

### 1.3 Creating an Individual User Account

Before you can start the application process, you will need to create an individual user account. To access an application in the municipal dashboard in the CSC online portal, the following two conditions must be met:

- 1) You must have an individual user account (which is associated with your email).
- 2) You must have your user account linked to a local government that is registered in the portal as a participating community.

The person that originally registers the local government via the portal can add other users to the municipal account. For more details on this process, see the section 2.4 below titled “Manage Municipality Users”.

To create a new user account, click on “Sign In” button in the upper right-hand corner of the homepage (as indicated in section 1.2) and select “Sign Up Now”, as below.

**Login**

Welcome back! Please enter your email and password below to sign in.

EMAIL ADDRESS:

PASSWORD:

[FORGOT PASSWORD?](#)

**SIGN IN**

**Sign Up for a New Account**

**With a user account, you are able to:**

- Register your local government.
- Access your municipal dashboard.
- Update and submit documentation for certification actions.

Signing up as a new user is easy and takes only a couple minutes. To sign up, click on the button below.

**SIGN UP NOW**

Applicants that need assistance in setting up their user accounts can contact the Department of Environmental Conservation Office of Climate Change at [climatesmart@dec.ny.gov](mailto:climatesmart@dec.ny.gov) or at 518-408-8448.

## 2. Municipal Dashboard

### 2.1 Accessing the Dashboard

To access the dashboard, click on the “Sign In” button in the upper right-hand corner of the homepage, enter your email and password, and click “Sign In”.

Then select “Municipal Dashboard” on the upper right-hand corner of the screen. On this dashboard page you can access all accounts for which you are a user. (It is possible for a single user to have access to multiple municipal dashboards.)

Once you select “Dashboard”, you will see the following menu:

<b>Begin Application</b> Begin a new certification application	→
<b>Update Municipality Profile</b> Update the primary contact, secondary contact, and certification report "introduction"	→
<b>Manage Municipality Users</b> Manage Municipality owners and contributors	→
<b>Download Resolution</b> Click to download the Municipality resolution	→

## 2.2 Begin Application

Select **"Begin Application"** to start a new application or continue editing an application that is in progress. The application page allows you to access all material related to certification actions. You can upload documentation at any time to keep track of your progress and stay organized. (The only exception is during a review period; applications are locked after they are submitted and while they are under review.) For more details on this process, see the section below titled "Certification Application".

## 2.3 Update Municipality Profile

The "Update Municipality Profile" page allows the user to provide information for the primary and secondary contacts. Please note that the names and street addresses of these contacts are visible to the public on the "Participating Communities" page.

At the bottom of the page, the user can also choose to update the CSC resolution, but most local governments will never use this function. Uploading the original CSC resolution during the initial registration process is all that is necessary to maintain status as a Registered CSC.

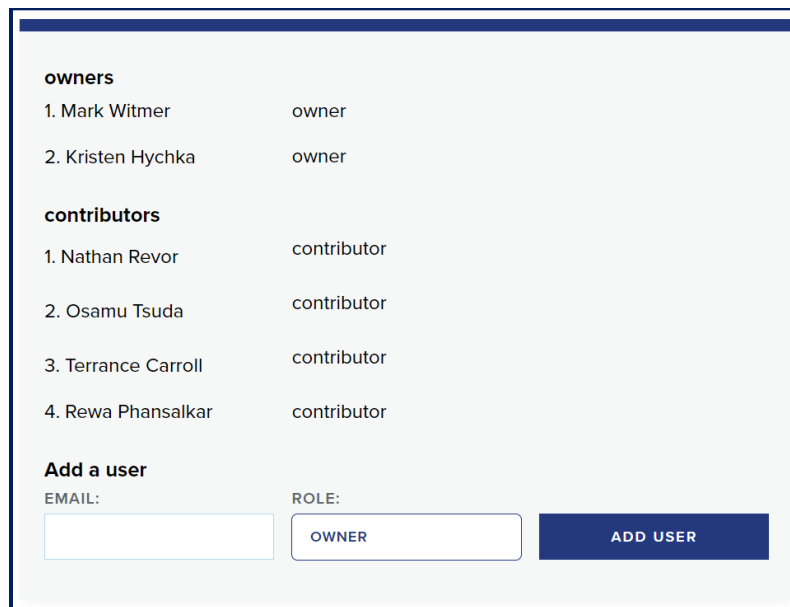
## 2.4 Manage Municipality Users

The “Manage Municipality Users” page allows users to add “owners” and “contributors” to the account. Owners can add and remove other owners and contributors. A maximum of five owners is allowed. Contributors can add other contributors but cannot remove owners. Both owners and contributors can access all information on the account and assist with the application for certification.

To add users, complete the following steps:

- Enter the user’s email address.
- Select either “owner” or “contributor.”
- Click “**Add User**.”

If the added user already has a personal account, the user will be linked to the municipality immediately. If the user does not have a personal account, the user will receive an email with instructions to create a user account.



The screenshot displays the 'Manage Municipality Users' interface. It features two sections: 'owners' and 'contributors'. The 'owners' section lists two users: Mark Witmer and Kristen Hychka, both with the role of 'owner'. The 'contributors' section lists four users: Nathan Revor, Osamu Tsuda, Terrance Carroll, and Rewa Phansalkar, all with the role of 'contributor'. Below these lists is a section titled 'Add a user' which includes an 'EMAIL:' label, a text input field, a 'ROLE:' label, a dropdown menu currently showing 'OWNER', and a dark blue 'ADD USER' button.

owners	
1. Mark Witmer	owner
2. Kristen Hychka	owner

contributors	
1. Nathan Revor	contributor
2. Osamu Tsuda	contributor
3. Terrance Carroll	contributor
4. Rewa Phansalkar	contributor

**Add a user**

EMAIL:

ROLE:

**ADD USER**

## 2.5 Download Resolution

The “Download Resolution” button in the dashboard menu allows the user to view the resolution submitted to register the local government in the CSC program.

## 3. Certification Application

Choose “**Begin Application**” to start a new application or continue working on an application in progress. This page allows users to view every certification action for each pledge element, submit documentation for each completed action, and keep track of points. All users can

contribute to this application. You can save material to this page and return at any time. To view a general overview of the application, click on “**Details and History**”.

Under this tab will appear the following:

- The current status of the whole application.
- Any previous certifications for the municipality including the valid dates and a link to the online certification report.
- Any comments published by reviewers.

DETAILS AND HISTORY		HELP
<b>Current Status</b> This application is <b>CERTIFIED</b>	<b>CERTIFIED</b>	
<b>Application History</b> This applicant has applied <b>one</b> time	<a href="#">CERTIFIED SEPTEMBER 16, 2016 - SEPTEMBER 17, 2021</a>	
<b>Reviewer Feedback</b>	<b>0 PUBLISHED COMMENTS</b> <b>0 ARCHIVED COMMENTS</b>	

### 3.1 Actions – Information and Status

Below the “Details and History” tab, you will see a list of the ten pledge elements (PE) and two other categories: 11. Innovation and 12. Performance. You can click on each one to view the various individual certification actions under each PE or category.

Under each action, the page lists the number of points available and indicates if the action is mandatory or a priority. By default, the action submission will be listed as “Unplanned” in the dropdown menu on the right. The user can change the status to “Planned,” if the municipality is working toward completion, or “Completed,” if the action submission is complete and documentation has been uploaded. This updates the point totals in the “Action Totals” calculator on the right. This calculator helps communities plan for the certification process by tallying up points and showing how close the application is to meeting the requirements to be certified.

2. Inventory emissions, set goals, and plan for climate action.

PE2 Action: Community Climate Action Plan

16 Points

Bronze Priority
Silver Priority

LAST UPDATED 06/21/18

UNPLANNED

UNPLANNED
PLANNED
COMPLETED

Note: Communities can view a similar page on the CSC website (called Certification Actions), but this public page does not save information for a municipality. To save changes you must be logged into your account and make edits from the certification application in the dashboard.

Applications that have been submitted and undergone review will have additional statuses listed that describe the current state of each action submission:

- Expired: Indicates the action submission is no longer valid.
- Approved: Indicates the action submission has been approved by reviewers and points have been awarded.
- Must Revise: Indicates the action submission needs revision before it will be approved, and comments have been provided.

Certification Criteria

Mandatory	2
Priority	3
Points	120
Pledge Elements	4

Show requirements for:

☒ BRONZE
☐ SILVER

Planned Action Totals  
(Planned)

Mandatory	1/2
Priority	5/12
Total Points	103/747
Pledge Elements	7/12
Total Actions	11/83

Mark actions as planned to determine whether or not your application would meet certification criteria.

## 3.2 Actions – Descriptions

Users can click on an action listed under a pledge element to open the “Action Submission” page and upload relevant documentation. To view the description of the action, click on the link next to “Action Submission.” This will bring up a pop-up with the item description and an explanation of materials required to obtain points.





### PE3 Action: Government Building Energy Audits

8 Points

10 Points

12 Points

16 Points

BRONZE PRIORITY
 SILVER PRIORITY

PRINT

GET PDF

A. Why is this action important?

B. How to implement this action

C. Time frame, project costs, and resource needs

D. Which local governments implement this action?  
Which departments within the local government are most likely to have responsibility for this?

E. How to obtain points for this action

F. What to submit

G. Links to additional resources or best practices

#### E. How to obtain points for this action

Points are obtained for this action by conducting Level-2 or Level-3 audits at one or more local government buildings. The percentage of buildings audited can be calculated based on either the simple percentage of buildings, or the percentage of square footage of the total building portfolio.

	POSSIBLE POINTS
ASHRAE Level-2 energy audit completed at 10% of buildings	8
ASHRAE Level-2 energy audit completed for 25% of buildings	10
ASHRAE Level-2 energy audit completed for 50% of buildings	12
ASHRAE Level-2 energy audit completed for 75% of buildings	16

### 3.4 Action Submissions – Uploading Supporting Documents

To upload a document to this page, select **“Choose File”** and browse for the document on your computer. You can provide a description of the documentation and a document title in the text boxes. Up to six files are allowed, and each is limited to 20MB. To remove files click on the “X” at the far right of the row. After uploading files, click on **“Save Action Submission”** to save your work. This will save your progress, but you can go back and edit the information any time before submitting the application. After the application has been submitted and reviewed, any reviewer comments will appear at the bottom of this page.

Description of Supporting Documentation

Upload Supporting Documentation

DOCUMENT TITLE (OPTIONAL)  
Enter the name of your document

Choose File No file chosen

UPLOAD

TYPE	TITLE	UPLOADED ON	DELETE
pdf	<a href="#">3.10 2015 Green Fleet Report-FINAL.pdf</a>	2/28/2018 at 11:48 AM	X
pdf	<a href="#">3.10-3.13 Green Fleet Policy.pdf</a>	2/28/2018 at 11:48 AM	X

SAVE ACTION SUBMISSION

### 3.5 Search and Filter Features

The search box at the top of the application page allows users to search for certification actions. This can help you quickly find actions you are working on or filter for all action submissions of a particular status. To search actions by key word, type the word or phrase in the text box and press “Search Actions”.

Search Actions

task force

☐ Planned
☐ Completed
☐ Must Revise
☐ Not Approved
☐ Approved
☐ Expired

☐ Mandatory
☐ Priority

To identify actions by status, check the desired box or boxes above. The Action Totals box at right will also reflect only those actions selected. Click on the Clear Search button to return to the full action listing.

SEARCH ACTIONS

CLEAR SEARCH

BACK TO TOP

EXPAND ALL

COLLAPSE ALL

1. Build a climate-smart community.

PE1 Action: CSC Task Force

20 Points

EXPIRED

Bronze Mandatory Silver Mandatory

LAST UPDATED 08/31/20 EXPIRED ON 08/31/20

2. Inventory emissions, set goals, and plan for climate action.

Certification Criteria

Mandatory 2

Priority 3

Points 120

Pledge Elements 4

Show requirements for:

BRONZE SILVER

Action Totals

(Completed, Approved)

To filter action submissions by status (like “Planned” or “Approved”) or by type (mandatory or priority), check the box next to the type you would like to display and the list below will be filtered accordingly. Note that the point totals in the “Action Totals” calculator on the right will also update correspondingly. For example, if you click the filter for “Must Revise” the “Action Totals” calculator will tally up the points for those action submissions only. Be sure to clear the search when finished.

Search Actions

Type in a word(s) to identify all actions with that word(s) in the title

☐ Planned
☐ Completed
☒ Must Revise
☐ Not Approved
☐ Approved
☐ Expired

☐ Mandatory
☐ Priority

To identify actions by status, check the desired box or boxes above. The Action Totals box at right will also reflect only those actions selected. Click on the Clear Search button to return to the full action listing.

SEARCH ACTIONS

CLEAR SEARCH

↑ BACK TO TOP

EXPAND ALL

COLLAPSE ALL

1. Build a climate-smart community.

2. Inventory emissions, set goals, and plan for climate action.

3. Decrease energy use.

4. Shift to clean, renewable energy.

PE4 Action: Renewable Energy Feasibility Studies

3 Points

MUST REVISE

THIS ACTION HAS VARIABLE POINTS: 3, 4, 5 • LAST UPDATED 08/14/19

Certification Criteria

Mandatory

2

Priority

3

Points

120

Pledge Elements

4

Show requirements for:

☒ BRONZE
☐ SILVER

Action Totals (Revise)

Mandatory

0/2

Priority

2/13

Total Points

36/1077

### 3.6 Retired Actions

This is an evolving program, so changes may be made that result in the retirement of certain actions. If at any point during your application an action becomes retired that was listed as “Unplanned,” it will no longer appear on the list of actions. If it was listed as “Approved,” “Expired,” or “Planned” on your application, you will still be able to view the action and any submitted documentation. (You are encouraged to save this documentation and move it to a different action, where applicable, to earn points.) If the submission associated with the retired action was approved, you will receive points for this action until the expiration date for that approved submission.

### 3.14 Implement a Car-sharing Program for Local Government Staff

3 Points

▼

- THIS ACTION HAS VARIABLE POINTS: 2, 3, 4
- THIS ACTION IS **RETIRED** AND CAN NO LONGER BE MODIFIED • EXPIRES ON 01/11/19
- LAST UPDATED 04/06/18

### 3.7 Calculating Points and Submitting

The “Action Totals” calculator on the right side of the application page allows you to keep track of your progress toward reaching the certification criteria. Only the points for “Completed” and “Approved” action submissions will display in this box when no filters are selected. You may view possible points for other categories of actions (like “Planned”) by using the search and filter features, but the “Action Totals” calculator will always default back to showing the tally of “Completed” and “Approved” action submissions.

Once you meet all the criteria for the bronze or silver classification, you will be able to click the **Submit Application for Review and Certification** button. Before the system registers that the requirements are met, this “Submit Application” button will not be available; it will be greyed out.

To submit, press this button and confirm submission. You will not be able to edit the application after it is submitted it will be locked during the review process. You will receive a notification at the top of the page indicating that you have submitted the application. All users will be notified of submission via email.



DETAILS AND HISTORY		HELP
<b>Current Status</b> This application is <b>CERTIFIED</b>		CERTIFIED
<b>Application History</b> This applicant has applied <b>one</b> time		<a href="#">CERTIFIED SEPTEMBER 26, 2019 - AUGUST 31, 2024</a>
<b>Reviewer Feedback</b>		<a href="#">29 PUBLISHED COMMENTS</a> <a href="#">0 ARCHIVED COMMENTS</a>

**Feedback for "PE1 Action: CSC Coordinator"**

POSTED: 7/15/2019 12:37 PM

SUBJECT  
Rationale for Approval

BODY  
The Town of Caroline provided a town resolution from June 2019 appointing Don Barber as the CSC coordinator and defining the responsibilities of that role.

[SHOW ARCHIVED COMMENTS](#)

**Feedback for "PE1 Action: CSC Task Force"**

POSTED: 7/12/2019 1:58 PM

SUBJECT  
Rationale for Approval

BODY  
The Town of Caroline submitted the required documentation:  
 1) A copy of the town board meeting minutes from Feb. 2012 that include the resolution 47 establishing the town advisory committee called "Energy Independent Caroline" (in place since 2005) as the body for coordinating implementation of CSC task goals. This decision was reiterated in resolution 117 of 2019 (which appointed the CSC coordinator).  
 2) The list of the members is missing some of affiliations/organizations they represent, but it clearly includes one town board member. It was assumed the others represent the community. Please clarify this in future submissions.  
 3) Meeting minutes, including records of attendance, from three task force meetings held within the past year (12/19/18, 4/18/19 and 6/19/19).

[SHOW ARCHIVED COMMENTS](#)

## 5. Glossary

**APPLICATIONS** - Each municipal applicant has one application. This application holds the current state of the action submissions. (Applications are composed of action submissions.) An application for certification can be submitted for review only when it meets the requirements.

Applications have various states. Applications can be in progress, submitted, under review, or certified. When applications are submitted or under review, any action submissions in the application that are completed or approved are locked, which prevents them from being edited while the application is being reviewed.

**ACTION SUBMISSIONS** - An applicant's work toward an action is stored as an "action submission." Action submissions live within applications and like applications they have various states or statuses. Action submissions can be unplanned, planned, completed, approved, or expired. For each action submission, the applicant should write a description of what action was implemented and upload the associated documentation. Reviewers communicate with applicants by leaving comments on action submissions.

**ACTIONS** - Actions are the things that an applicant must do to become certified. Actions belong to action categories (like pledge elements). Actions can be priority or mandatory for one or more certification levels. Actions can be retired, which allows past action submissions to persist in the system but prevents applicants from submitting on the action. Actions may have a fixed number of points associated with them, or they can have multiple point tiers. Actions have names and descriptions.

**ACTION CATEGORIES** - Action categories are used to group actions. For example, for CSC certification, the pledge elements are a type of action category; the priority actions are another type.

**APPLICANT** - The applicant is the entity that is applying for certification. For CSC certification, all applicants are one of the four types: cities, town, villages, and counties. In this context, the term "municipalities" is also used to describe all four types of local governments that exist in New York State.

**USERS** - Users represent the people who login and use the <https://climatesmart.ny.gov> platform. Each applicant may have multiple users associated with it. There are also users who are reviewers and/or who are staff administrators that maintain the platform.