



## New Construction Documentation Checklist

All California Electric Homes projects must upload the following documents through the participant portal.

### **Application Documents:**

- Completed program participation agreement (complete during application submittal or TRC to provide)
- Completed enrollment survey (CalEHP staff to provide to each applicant upon enrollment)
- Proof of Electricity Utility service (will serve letter, utility bill)
- W9 for project payee
- Construction schedule<sup>1</sup>
- Shared HERS registry access for all single-family and low-rise multifamily projects
  - CHEERS: TRC Energy Services
  - CalCERTS: TRC Energy Services
  - For all low-rise 2022 code residential building projects, per CEC direction, to comply with the 2022 Energy Code section 10-103(a), the responsible person shall register all compliance documentation with a data registry once an approved residential data registry capable of processing these forms becomes available
- Energy models for each plan or building type (.bld files or .ribd files)
  - When a single lot contains both a single-family home and an ADU project applying for incentives, that project must submit two energy models, one of the main home and for the ADU; the ADU's mechanical and water systems must be completely separate from any equipment servicing main home
  - Manufactured homes will not require an energy model, but must submit a Custom Order Form listing all home specifications and a paid invoice
- CF1Rs to verify the most up-to-date files
  - Watermarked with CalCERTS or CHEERS and signed by 2019 or 2022 certified CEA
- Complete set of architectural, mechanical, electrical, and plumbing (MEP) plans
- Lot list showing addresses, lot numbers, and plan types (in an excel file)
- Site plan with North arrow

---

<sup>1</sup> Submitted construction schedules will be used to reserve incentives, failure to follow the construction schedule, without updating the program prior to deviating from the schedule, could result in loss of incentive reservations



□ Specification sheets for verification of product qualification

- The program requires specifications to confirm details such as make, model number, manufacturer, etc. match the inputs in the CF1Rs and information in the plans, including:
  - Space cooling equipment (AHRI Certificate required)
  - Space heating equipment (AHRI Certificate required)
  - Domestic hot water equipment (AHRI Certificate required)
  - Induction cooking
  - Glazing (U-factor and SHGC)
- If applicable to your project, you must also upload the following spec sheets for application approval:
  - Cool roof
  - Heat Recovery Ventilator
  - Whole house fans
  - Solar thermal
- Additional Battery Storage Documents:
  - A signed contract with the ESS installer
  - A battery storage system must be entered in the energy model provided

CalEHP staff may request additional specification sheets as necessary.



## **Construction/Installation Documents (submitted during construction):**

- Significant change orders that materially affect energy aspects of the project
- Revised CF1Rs

## **Verification Documents (submitted after construction completion):**

- Incentive Request Form (IRF) to identify which lots or buildings are complete and ready for verification
- CF2Rs (completed and signed via the HERS registry)
- CF3Rs (completed and signed via the HERS registry)
- Adjustment application<sup>2</sup>
- Revised energy models for each plan or building type (.bld files or .ribd files) as applicable
- Revised CF1Rs (that match the CF2R & CF3R on the HERS registry)
- Revised plans
- Revised specification sheets
- Certificate of Occupancy for completed lots or buildings (as noted on the IRF)
- Proof of Permit Closure required for certain measures
- Completed customer satisfaction survey (TRC to provide to each applicant during verification)
- Additional Battery Storage Documents:
  - A photo of the battery disconnect location
  - Confirmation of the mode of operation the battery was placed in. This is in the battery manufacturer's mobile application. A screenshot of the app depicting the operation mode will be sufficient to meet this requirement. If a mobile application is not available, a letter from the Original Equipment Manufacturer (OEM) specifying the mode of operation the battery should be programmed to will be required.

---

<sup>2</sup> For projects that are going through an adjustment