



## NEW CONSTRUCTION PROJECT DOCUMENT CHECKLIST

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

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### *Enrollment Application Documents:*

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- Completed and Signed Enrollment Form (provided by CalEHP staff)
- Completed Terms and Conditions (provided by CalEHP staff)
- W9 for project payee
- Construction schedule! (include number of lots completed by quarter per year)
- Share HERS registry with TRC: TRC Energy Services
  - Please provide TRC with the HERS provider and company name
- CF1RS:
  - Watermarked w/ CalCERTS or CHEERS
  - Signed by 2019/2022 residential certified CEA
- Energy Models:
  - Must be in Energy Pro 8+ or CBECC Res 2019 or 2022 (.bld or .ribd format)
  - 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 for the main home and one for the ADU; the ADU's mechanical and water systems must be completely separate from any equipment servicing the 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
- Lot List (provided by CalEHP staff)

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### *Remaining Project Documents (Submitted During Construction):*

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- Enrollment Survey
- Current set of architectural, mechanical, electrical, and plumbing (MEP) plans
- Site Plan with North arrow
- Specification sheets for verification of product qualification
  - Space Cooling Equipment: including make, model number, and manufacturer
  - Space Heating Equipment: including make, model number, and manufacturer
  - Domestic Hot Water Equipment: including make, model number, and manufacturer
  - Glazing: including U-factor and SHGC for windows

- If applicable to your project, you must also upload the following spec sheets for application approval:
  - Cool Roof
  - Heat Recovery Ventilator
  - Solar Thermal
  - Induction Cooktop
- Additional Battery Storage Documents:
  - A signed contract with the ESS installer
  - A battery storage system must be entered in the energy model provided
- Updated Construction Schedule
- Significant change orders that materially affect energy aspects of the project.
- Revised CF1R and Energy Models

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*Completion Verification Documents (Submitted After Construction):*

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- Incentive Request Form (IRF) to identify which lots or buildings are complete and ready for verification
- CF2Rs (completed and signed via the HERS registry)
- CFR3s (completed and signed via the HERS registry)
- Certificate of Occupancy for completed lots or buildings (as noted on the IRF)
- Completed customer satisfaction survey (provided by CalEHP staff)

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*Adjustment Verification Documents (if changes were made to energy models):*

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- Adjustment Form<sup>2</sup>
- Revised energy models<sup>2</sup> for each plan or building type (.bld files or .ribd files) as applicable
- Revised CF1R1R<sup>2</sup> (that match the CF2R & CF3R on the HERS registry)
- Revised plans<sup>2</sup>
- Revised specification sheets<sup>2</sup>

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<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.

<sup>2</sup>Required for projects that are going through an adjustment.