



NEW CONSTRUCTION PROJECT DOCUMENT CHECKLIST

All projects enrolling in California Electric Homes (CalEHP) must upload the following documents through the participant portal.

Application and Enrollment Documents

Submit before the scheduled Kickoff Call with the CalEHP program team

- ☐ Lot List (template provided by CalEHP staff)
- ☐ Share CHEERS HERS registry with TRC: TRC Energy Services (CEA (single family, multifamily low-rise, and ADU projects only)
- ☐ CF1Rs signed by a 2019 or 2022 Residential CEA (single family, multifamily low-rise, and ADU projects only)
- ☐ PERF1Cs signed by a 2019 or 2022 Non-Residential CEA (multifamily high-rise only)

Submit after the Kickoff Call

- ☐ Completed and signed Enrollment Form (provided by CalEHP staff)
- ☐ Completed Terms and Conditions (provided by CalEHP staff)
- ☐ W9 for project payee
- ☐ 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 heating systems must be completely separate from any equipment servicing the main home.
 - Manufactured homes do not require an Energy Model, but must submit a Custom Order Form from the manufacturer that lists all home specifications and a paid invoice

Remaining Project Documents to be Submitted DURING Construction

- ☐ 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
 - If applicable to your project, upload the following spec sheets:
 - Induction cooktop
 - Additional Battery Storage Documents:
 - A signed contract or paid invoice with the ESS installer
 - A battery storage system must be entered in the energy model provided
 - ☐ Significant change orders that materially affect energy aspects of the project
 - ☐ Revised CF1R or PERF1C and Energy Models
-

Completion Verification Documents to be Submitted AFTER Construction

- ☐ Incentive Request Form (IRF) identifying which lots/buildings are complete and ready for verification
 - ☐ CF2Rs (completed and signed via the CHEERS HERS registry)
 - ☐ CF3Rs (completed and signed via the CHEERS HERS registry)
 - ☐ Certificate of Occupancy for completed lots or buildings (as noted on the IRF)
 - ☐ Completed customer satisfaction survey (provided by CalEHP staff)
-

Adjustment Verification Documents

(ONLY required if changes were made to Energy Models after enrollment)

- ☐ Adjustment Form
- ☐ 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 CHEERS HERS registry)
- ☐ Revised plans
- ☐ Revised specification sheets