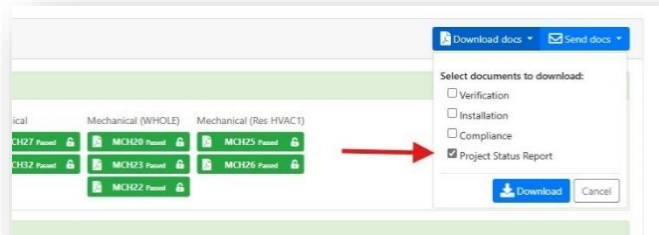


Instructions to submit an Incentive Request Form (IRF):

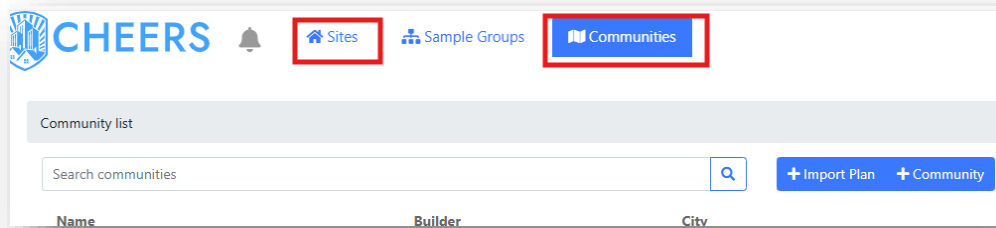


Prior to submitting an Incentive Request Form (IRF), lot/building/unit/ADU must have completed construction and be approved for occupancy through the permitting jurisdiction. HERS registry documents must also be complete prior to submitting an IRF.

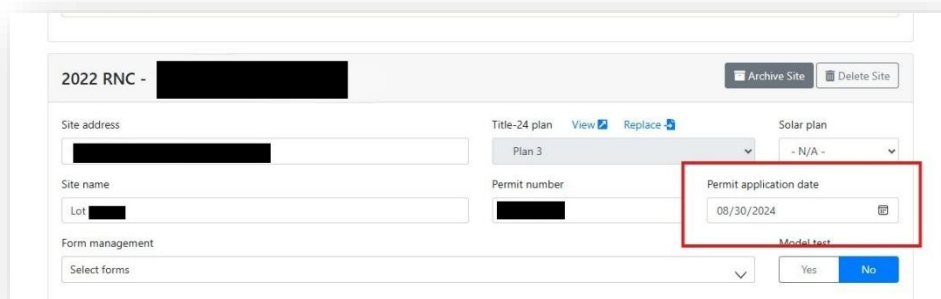
1. Collect the requested lot/unit/building/ADU Certificate of Occupancy (COO) or Final Building Permit Sign-Off (if in lieu of Certificate of Occupancy). Document(s) should include appropriate dates and signatures. Upload complete COOs to the [TRC - Customer Application Portal](#)



2. Confirm lot(s) are “Complete” in the CHEERS HERS Registry. NOTE: you will need to create an account and provide access to the project for verification. (See also - CHEERS resources).
 - a. Log into CHEERS and navigate to the project via “Sites” or “Communities.”



- b. Navigate to the specific lot or unit that you are requesting (you may need to click back to “Sites” to see all addresses). Confirm “Permit Application Date” field contains the date of permit application. If this field is incomplete, TRC is not able to download the necessary verification documents.



- c. Select download “Project Status Report” (PSR).
 - i. Confirm “HERS Verifiable Measures” is marked COMPLETE on the PSR.
 - ii. If HERS verifiable measures are INCOMPLETE, reach out to the project’s HERS rater and ask that they complete the documents in the CHEERS Registry.

**CHEERS REGISTRY
PROJECT STATUS REPORT**

Scan to Validate

PROJECT SUMMARY

Project Name: [REDACTED]

Address: [REDACTED]
Sacramento, CA 95832

City, State, Zip: [REDACTED]

Building Department: [REDACTED]

Permit Number: [REDACTED]

Building Energy Code: 2022 Standards

HERS VERIFIABLE MEASURES COMPLETE ✓

ENERGY CODE COMPLIANCE COMPLETE ✓

3. Complete IRF (provided by TRC, see example document for instructions) for lot/building/unit/ADUs that have received COO, are “COMPLETE” and have permit dates entered in the registry.
4. Upload completed IRFs to the [TRC - Customer Application Portal](#) and notify your TRC Operations Associate that you have submitted an IRF.
 - Confirm all corresponding COOs are also uploaded
 - You do not need to submit the PSR, TRC will review and confirm in the CHEERS Registry

Incentive Request Form

Programs your project is enrolled in
CalEHP - California Electric Homes
CESHP - California Energy Smart Homes

Assigned by TRC, found on enrollment docs and most correspondence



Use the sections below to identify your project information as well as the programs your project is enrolled in.

GENERAL INFORMATION		
Builder/Applicant Name	Contact Name	Phone Number
PROJECT INFORMATION		
Project Name	TRC APP ID	Project City/Zip Code
ENROLLED PROGRAMS		
Program Name	Program Name	Program Name

This request includes plans that include and were approved for bonus measure incentives Yes No
 I have uploaded all required documentation to the customer portal for the requested incentives Yes No

Enrolled bonuses found on Incentive Calculator included with Enrollment Package

Use the columns below to identify the lot/building number, street address, as-built plan, orientation and type of residential new construction buildings (single-family, multifamily or ADU) for up to 10 completed single family lots or multifamily buildings. If you need assistance, please reach out to the Operations Associate assigned to your project.

Lot#	Lot Address	Plan Name (must match HERS registry)	Residence Type

Lot number or building number from Site Plan

SF individual address MF may submit for entire building or individual units

Plan/Model of unit, verified by HERS rater on CFIR

Type of building, may submit multiple types per request

I certify that the home(s) meet the program eligibility requirements and that the information I have provided is true and correct. I understand that the final refund payment is subject to an on site verification of equipment and systems installation and operational integrity by a TRC representative.

Applicant Signature _____ Date _____

Sign electronically or in hand and scan

Date

Scan This Form And Upload To Your Account In The Customer Portal.
 If you need assistance with this, please reach out to the Operations Associate assigned to your project.

FOR TRC USE ONLY	
Date Received: _____ Number of Homes on this request: _____ Total incentive amount requested: _____	Total Amount Approved By TRC