



NEW CONSTRUCTION PROJECT DOCUMENT CHECKLIST

All projects enrolling in California Energy-Smart Homes must upload the following documents through the [participant portal](#).

Application and Enrollment Documents

Submit before the scheduled Kickoff Call with the Energy-Smart Homes program team

- ☐ Lot List (template provided by Energy-Smart Homes staff)
- ☐ Share CHEERS HERS registry with TRC: TRC Energy Services
- ☐ CF1RS signed by a 2019 or 2022 Residential CEA

Submit after the Kickoff Call

- ☐ Completed and signed Enrollment Form (provided by Energy-Smart Homes staff)
- ☐ Completed Terms and Conditions (provided by Energy-Smart Homes 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 systems must be completely separate from any equipment servicing the main home.

Remaining Project Documents to be Submitted DURING Construction

- ☐ 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 for application approval:
 - Induction cooktop
- ☐ Proof of electric utility service provider (Will Serve Letter or utility bill)
- ☐ Significant change orders that materially affect energy aspects of the project
- ☐ Revised CF1Rs 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 HERS registry)
 - ☐ CF3Rs (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 Energy-Smart Homes staff)
-

Adjustment Verification Documents *(ONLY required if changes were made to energy models after program 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