



California Energy-Smart Homes

Statewide Alterations Program Overview





INTRODUCTION

Agenda

- Program Eligibility and Incentives
- Required Documentation
- Application Process
- How to Receive Incentives

Program Eligibility and Incentives

Program Eligibility

- Comply with program eligibility requirements as outlined in the handbook:
 - [Energy-Smart Homes Whole Building Electrification Alterations Participant Handbook](#)
- Receive electric service from PG&E, SCE, or SDG&E
- A change in technology that includes conversion of all gas appliances and equipment to electric systems (replacing fossil fuel combustion equipment with heat pumps), including:
 - Heat pump space heating
 - SEER 15 or greater; HSPF 8.7 or greater
 - HVAC equipment installed must utilize heat pump technology. Technology that utilizes electric resistance as the primary source of heating is not eligible for the program
 - Heat pump water heating
 - NEEA Tier 2 rating or greater
 - Induction cooking
 - Electric clothes dryers (bonus incentives for heat pump clothes dryer)
- All gas lines to be capped



Program Eligibility Cont.

- Specification sheets for the following equipment
 - Space cooling (AHRI certificate required)
 - Space heating (AHRI certificate required)
 - Domestic hot water (AHRI certificate required)
 - Electric or heat pump dryer
 - Induction stove
- [AHRI Certification Directory \(ahridirectory.org\)](http://ahridirectory.org)
- The [CEC MAEDBS database](#) is used to confirm the equipment being installed is approved if we do not receive an AHRI certificate for the equipment being installed (which is common if the equipment being installed is new to the market). Equipment does not have to be in this database to qualify.
- Before and after pictures including photos of equipment name plates for every single appliance being replaced and installed



Program Incentives

Alteration Incentives per Unit	2023	2024	2025
Single Family Whole Building Electrification Alterations Each dwelling unit must remove all gas and install heat pump space heating, heat pump water heating, electric or induction cooking, and an electric dryer	\$5,550	\$4,250	\$3,750
Single Family HP Dryer Bonus	\$400	\$250	\$250
Single Family Electrical Infrastructure Upgrade Bonus See section 2.4.1 for eligibility requirements	\$1,000	\$1,000	\$1,000

Note: Energy-Smart Homes incentives cannot exceed total project costs



Electrical Infrastructure Upgrade Bonus

- Incentives:
 - Single family projects can receive up to \$1000
- Eligibility Criteria:
 - Upgrade to a new electric panel to meet added load demands of the building for the new program measure installs
 - Adding/updating circuit breakers in existing electric panels for program measure installs
 - New electric wiring to the installed measures
 - Running 208, 220/240v outlets/circuits for measure appliance installations
 - Paid itemized invoice that includes material and installation/labor costs associated with the upgrade per measure



Required Documentation

Required Documentation

The program requires the following documentation as part of each project's application (full checklist here [Alterations Document Checklist](#)):

- Completed program participation agreement (application)
- Completed enrollment survey (TRC to provide each applicant upon enrollment)
- Proof of electric utility service and prior 12 months of gas utility data
- W9 for project payee
- Contractor license number



Required Documentation Cont.

- Specification sheets for installed equipment
 - AHRI certificates for HVAC and DHW systems
- Cost documentation for equipment, installation, and removal of the existing system
 - Energy-Smart Homes requires an itemized invoice that includes material and installation/labor cost per measure installed
- Proof of permit closure for HPWH and/or HP HVAC and/or electrical panel upgrade for infrastructure upgrades
 - Permits should be final/closed and show permit date, permit number, building official signature, and scope/description of work



Required Documentation Cont.

- Photos of existing equipment and photos of newly installed equipment
 - Photos of existing appliances (should be panned out to see the entire appliance)
 - Photo of existing appliances data plate clearly indicating brand and model number for each of the removed systems
 - Photo of newly installed appliances (should be panned out to see the entire appliance)
 - Photo of newly installed appliance data plate clearly indicating brand and mode number for each of the installed systems

Single family projects require photos for each measure being installed and replaced.



Program Eligible Photo Examples

Gas HVAC to HP HVAC

Status	Manufacturer	Model #	Serial #
Before	Carrier	58MCB060	1511A02352



Status	Manufacturer	Model #	Serial #
After	Mitsubishi	PEAD-A24AA8 (handler) PUZ-A24NHA7 (compressor)	28R00287 (handler) 20916651 (compressor)



Program Eligible Photo Examples

Gas stove to induction cooktop replacement

Status	Manufacturer	Model #	Serial #
Before	Bosch	HGS3053UC/09	991060088038001500



Status	Manufacturer	Model #	Serial #
After	Samsung	NE63B8611SS/AA	0JWN7DCT900065M



Program Eligible Photo Examples

Gas dryer to electric dryer replacement

Status	Manufacturer	Model #	Serial #
Before	LG Electronics	DLGX3361V	110KWZHAD197



Status	Manufacturer	Model #	Serial #
After	Samsung	DVE45B6300C/A3	0BE65BBT100456E



Application Process

Single Family Application Process

1. Complete all required measure upgrades, gather the required post-installation photos, and receive final/closed permits for the work performed.
2. Notify your outreach associate that you are ready to apply.
3. Receive the application and documentation checklist as well as a handoff to your case manager.
 - The case manager will review your application and become your main point of contact within the program through project completion and incentive payment.
4. Submit your complete application to your case manager.
5. Await confirmation of your complete application or request for revisions/additional information from your case manager.
6. Once the application is confirmed complete and project is verified, your project will be submitted for payment.



Application Overview

SF: Name of homeowner

Applicant Information		
Applicant Business Name:	Applicant First Name:	Applicant Last Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Address:	Address 2:	City:
<input type="text"/>	<input type="text"/>	<input type="text"/>
State:	Zip:	Applicant Phone:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Applicant Email:		
<input type="text"/>		



Application Overview

Payee business name should match the company or individual name from your W9 form

Payee Information		
Payee Business Name:	Payee First Name:	Payee Last Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Payee Address:	Payee Address 2:	Payee City:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Payee State:	Payee Zip:	Payee Phone:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Payee Email:	Tax Classification:	
<input type="text"/>	<input type="text"/>	

Application Overview

Project Information

Project Building Type:

Electric Utility Provider:

Gas Utility Provider:

Site Contact First Name:

Site Contact Last Name:

Site Contact Email:

Site Contact Phone:

Site Address:

Site City:

Site Zip:

Permitting Agency:

Permit Date:

The date your permit was issued final/closed



Application Overview

Estimated Installation Date

Year Property Built:

Electric Utility Account Number:

Contractor License Number:

Measures

Measure Type	Installing	Make/Model of Replaced Measure	Make/Model of New Measure
Heat Pump HVAC	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Heat Pump Water Heater	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Central HP Water Heater	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Electric Dryer	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Electric Cooktop	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Check the box for each measure being installed

Central HP Water Heater Design Incentive

Heat Pump Dryer Bonus

Induction Cooktop

Infrastructure Upgrade Bonus

Check the applicable boxes for projects seeking program bonuses



Incentive Payment

How to Receive Incentives

1. After your project completes construction, submit your verification documents.
2. Following TRC's verification of project completion, TRC submits the project to PG&E for incentive payment approval.
3. Receive incentive payments from TRC on behalf of the program.

Verification documents must include final/closed permits, post installation photos, and paid itemized invoices.



Resources and Next Steps

Next Steps

- Send any questions you have after viewing this recording to your outreach associate
- When you are ready to apply, notify your outreach associate.
- Outreach associate will share the application and documentation checklist with you.
- Outreach associate will introduce you to your case manager.

Program Contacts and Resources

- Phone Line: (833) 987-3935
- Email Address: caenergysmarthomes@trccompanies.com
- Website: www.caenergysmarthomes.com
- Electrify your inbox: <https://lp.constantcontactpages.com/su/wXhxaW4>





Thank you!

