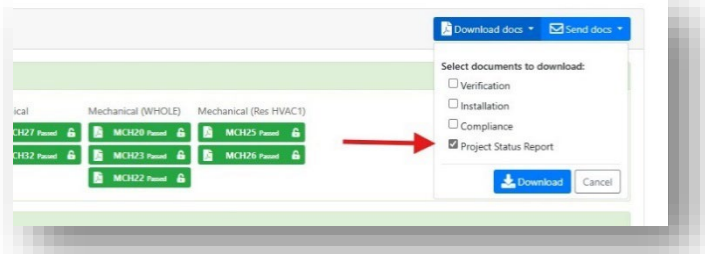


INSTRUCTIONS TO SUBMIT AN INCENTIVE REQUEST FORM (IRF):

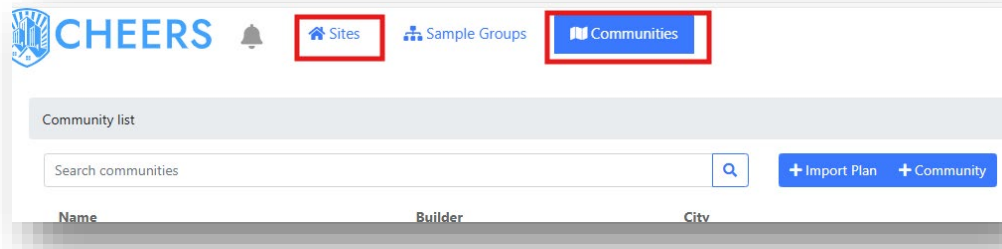
Prior to submitting an Incentive Request Form (IRF), lot/building/unit/ADU must have completed construction and be approved for occupancy through the permitting jurisdiction. HERS registry documents must also be complete prior to submitting an IRF.

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](#)

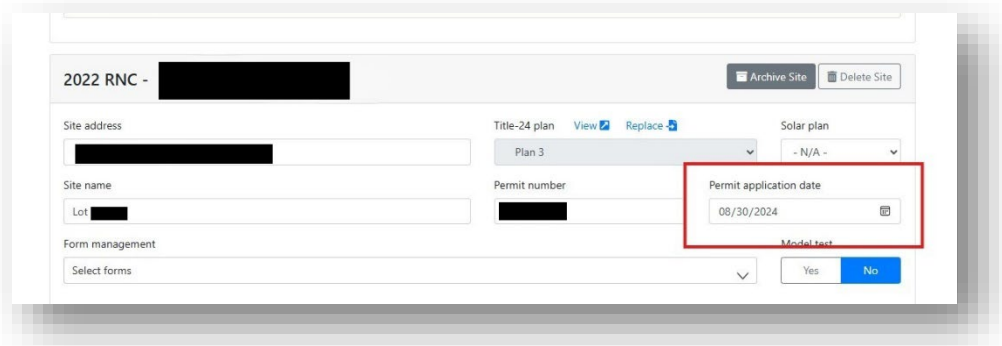


2. Confirm lot(s) are “Complete” in the CHEERS HERS Registry. NOTE: you will need to create an account and provide access to the project for verification. (See also - CHEERS resources).

- 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.

The image shows a screenshot of the CHEERS Registry Project Status Report (PSR) interface. At the top, there is a blue header with the CHEERS logo on the left and the text "CHEERS REGISTRY PROJECT STATUS REPORT" in the center. To the right of the header is a QR code with the text "Scan to Validate" below it. Below the header is a "PROJECT SUMMARY" section. On the left side of this section, there are labels for "Project Name:", "Address:", "City, State, Zip:", "Building Department:", "Permit Number:", and "Building Energy Code:". The corresponding values are partially redacted with black boxes. The address is "Sacramento, CA 95832" and the building energy code is "2022 Standards". On the right side of the "PROJECT SUMMARY" section, there are two rows of information. The first row is "HERS VERIFIABLE MEASURES" with a blue button labeled "COMPLETE" and a green checkmark icon. The second row is "ENERGY CODE COMPLIANCE" with a blue button labeled "COMPLETE" and a green checkmark icon. A red rectangular box highlights the "HERS VERIFIABLE MEASURES" row.

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

Program(s) 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 Pkg

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#	LotAddress	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 CF3R	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 ink 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: _____	Total Amount Approved By TRC
Number of Homes on this request: _____	
Total incentive amount requested: _____	