



California
**ELECTRIC
HOMES**

Closing the Loop: Submitting for Incentives After Project Completion



Agenda

- Introductions
- Incentive requests
 - Program refresher
 - Incentive request process
- Common errors
- Tracking your enrolled lots, IRF submissions, and payments
- End-of-year deadlines
- Discussion/Q&A



California
**ELECTRIC
HOMES**

Introductions



Program Team Presenters

Olivia Pringle

Associate Project Manager



Kate Matasovsky

Incentive Processing Lead





California
**ELECTRIC
HOMES**

Incentive Requests: Program refresher and incentive request process



Program Refresher

California Energy-Smart Homes Program

- Administered by PG&E
- Offers Advanced Technology Bonuses

California Electric Homes Program (CalEHP)

- Administered by California Energy Commission (CEC)
- Offers energy storage incentives and bonus incentives

Dual Enrolled projects

- Projects enrolled in both programs will share the base incentive cost
- Bonuses, including Advanced Technology Bonuses, are paid by the program offering the specific bonus

The incentive request process is the same for both programs.

Dual-Enrolled projects will receive separate payments from each program

- Check amounts will equal the total incentive for the submitted lots*
(shared base incentive + applicable bonuses)

**For purposes of this presentation, “lots” will refer to enrolled addresses in the program, whether single family, ADU, or multifamily units*

When can I request payment?

Project must meet all criteria before requesting incentives

- When the program team has completed the project's technical review
(Projects selected for field inspection must pass inspection prior to submitting for incentives)
- After Certificate of Occupancy (COO) has been received*
- When HERS measures are complete in the HERS registry

NOTE: Production builders can request as lots complete

**Or otherwise cleared for occupancy by the appropriate jurisdiction*

Can I request an ACH (Automated Clearing House) payment?

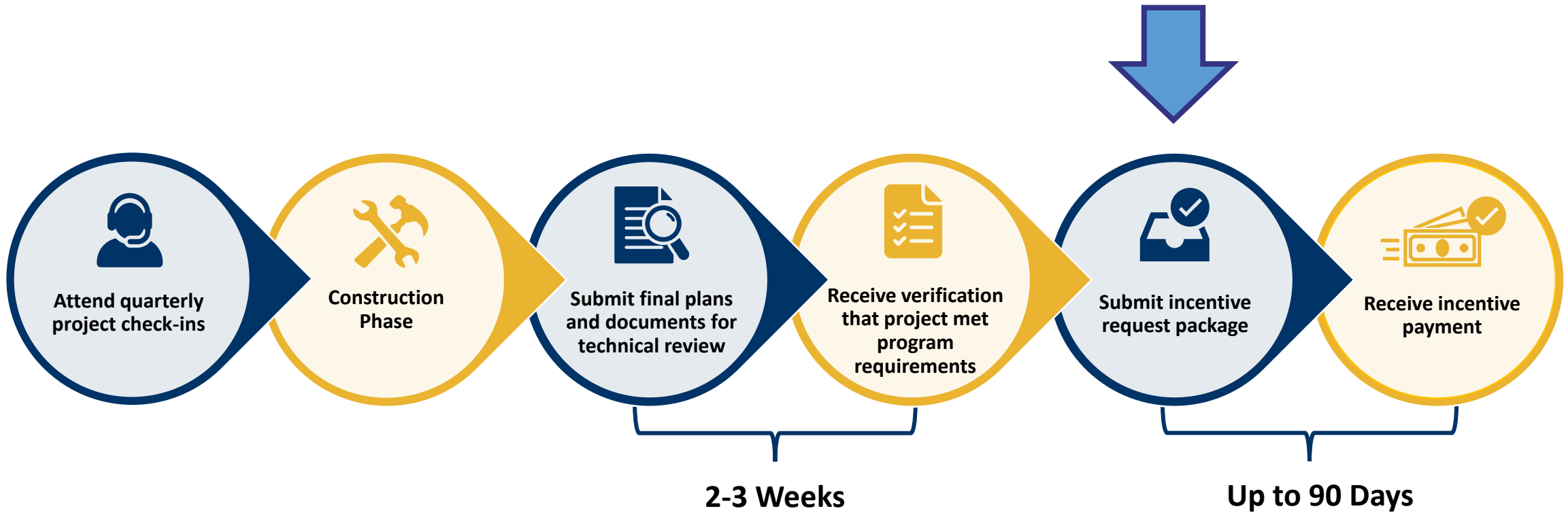
- California Electric Homes can support ACH payment options.
 - Please reach out to your operations associate for assistance in setting up an ACH payment
- California Energy-Smart Homes payments are only available via check.

When can I expect payment?

- Program team submits for payment approval from the specific program once monthly, ~ 15th of each month
- Payment approval and subsequent check issuance or ACH may take up to 90 days

Please confirm with your operations associate the address on file and/or ACH instructions are correct.

Participant Journey: Post-Enrollment



Projects must **submit required documents for technical review by November 17** to receive that program year's incentives for completed lots, buildings, or ADUs. Following technical review documentation submittal, the program team will review to confirm if your project meets program requirements and provide guidance on how to request incentives.

Participant Journey: Post-Enrollment



Projects must **submit required documents for technical review by November 17** to receive that program year's incentives for completed lots, buildings, or ADUs. Following technical review documentation submittal, the program team will review to confirm if your project meets program requirements and provide guidance on how to request incentives.

Incentive Request Process – Four Easy Steps!

1. Collect Certificate of Occupancy (COO) from the project jurisdiction
2. Confirm lot is complete in the HERS registry (CHEERS)
3. Complete the Incentive Request Form (IRF)
4. Submit COO and IRF by uploading to the program's Customer Portal and notify your operations associate via email

IRF instructions are also hosted on the “Resources” page of the program websites:

[Resources - California Electric Homes Program](#)

[Resources - California Energy-Smart Homes](#)

Step 1: Collect Certificate of Occupancy (COO)

1. Collect Certificate of Occupancy (COO) from the project's local jurisdiction for lots that have completed construction
 - For production builders, this will require coordination with your construction team
 - In jurisdictions where COO's are not issued, the program will accept a final sign-off on the permit card "in lieu" of the certificate of occupancy
 - Whenever possible, please include only one COO (*or permit card in lieu*) per file

Step 1: Collect COO (continued)

CITY OF ELK GROVE
DEVELOPMENT SERVICES • BUILDING SAFETY & INSPECTION
8401 LAGUNA PALMS WAY • ELK GROVE, CALIFORNIA 95758
PHONE: (916) 478-2235 FAX (916) 691-4757
www.elkgrovecity.org

CERTIFICATE OF OCCUPANCY

This certifies the building located at the below address complies with the provisions of the California Residential, Building, Mechanical, Electrical, Plumbing, Energy Compliance Codes, California Green Building Standards Code and City Zoning Ordinance and related ordinances and laws for the following zone and occupancy group.

Permit Number: [REDACTED]
Project Location: [REDACTED]
APN: [REDACTED]
Zone: [REDACTED]

Property Owner Information:
[REDACTED]

Description of Work: [REDACTED] SW PH 1 - PLAN
1824 F
Construction Type: V-B
Occupancy Type: R-3
Number of Units: 1
CA Code Year Enforced: 2022
Square Footage: 1824
Fire Sprinklers: Yes

Date Issued: 7/22/2024

By: 
Brian Frenger, Chief Building Official

POST IN A CONSPICUOUS PLACE

City of Lemon Grove
3332 Main Street
Lemon Grove, CA 91945
619-825-3800
For Building Inspections call 619-825-3808
Prior to 3PM for next day inspection.

PERMIT NO: [REDACTED] LOT 14
Permit Type: RESIDENTIAL/NEW
Permit Status: Issued
Date: 11/22/2023
ASSESSORS PARCEL NO. [REDACTED]

PROJECT ADDRESS: [REDACTED]
OWNER: [REDACTED] MAILING ADDRESS: [REDACTED]
CONTRACTOR/PROFESSIONAL: [REDACTED] MAILING ADDRESS: [REDACTED]
DESCRIPTION: [REDACTED]
VALUATION: 303764.52 RECEIPT NO. [REDACTED]
PAYMENT METHOD, CHECK PAYMENT STATUS: PAID AMOUNT PAID: 8,200.42

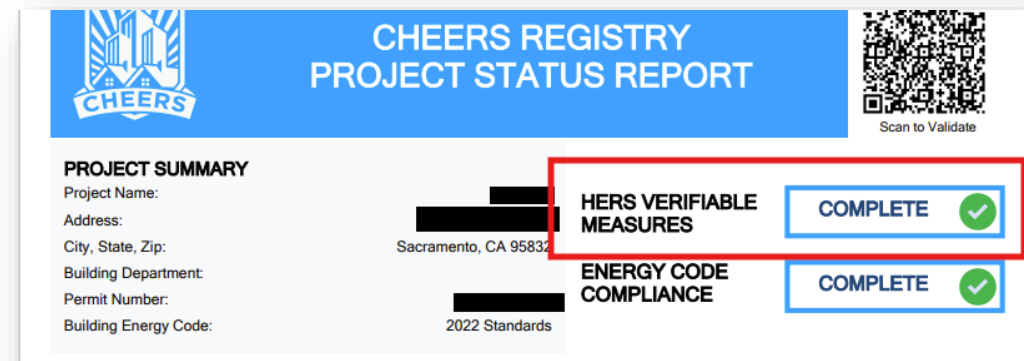
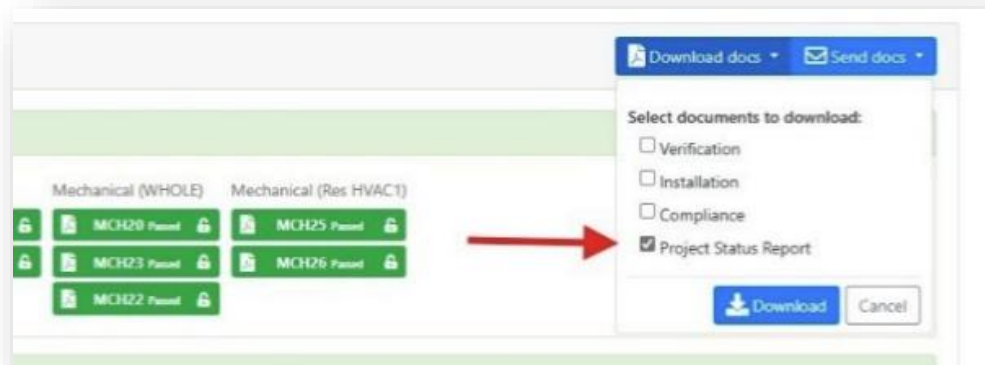
BUILDING & ANCILARY	INSPECTOR	DATE	NOTES
SETBACKS			
FOUNDATION	V. E. C.	1-18-24	
SLAB/REINFORCE			
PRE. GROUF			
GROUF			
UNDER FLOOR/ PLUMB			
UNDERGROUND PLUMBING	V. E. C.	12/18/23	
GROUND ELECTRIC			
GROUND RODS			
WATER SERVICE			
SEWER	M.H. [REDACTED]	6/20/24	
FLOOR JOISTS	V. E. C.	3-27-24	
EXTERIOR SHEAR	V. E. C.	3-27-24	
FLOOR SHEATHING	V. E. C.	2-27-24	Pending moving. Pushing to see mail on 9-14 verified by sube. -VE 3-27-24
FRAMING			
ROUGH ELECTRIC	comso	5-6-24	
ROUGH PLUMBING		5-6-24	
ROUGH MECHANICAL		5-6-24	
SHOWER PAN/TUB			
ROOF NAILING	V. E. C.	3-18-24	
GAS TEST			
INSULATION			
DRYWALL	M.H. [REDACTED]	5/24/24	
POINT LATH	comso	5/8/24	
WATER HEATER			
TITLE INSPECTION			
FINAL APPROVALS REQUIRED			
PLANNING/ZONING	AZ	9/18/24	Planning OK
FIRE	EC	9/18/24	
FNG/SANITATION	EC	7/26/24	
STRMWTB			
SOLAR PV - NEW CONSTRUCTION			
FINAL BUILDING APPROVAL		9/26/24	
Planning Authorizes issuance (Sign & date below)			
SIGRE:			
FLEC CLEARANCE:			
GAS CLEARANCE:			

****FINAL BUILDING APPROVAL SHALL SERVE AS OCCUPANCY****
CALL FOR INSPECTION 24 HOURS IN ADVANCE- (619) 825-3808
WHITE CHECKLIST YELLOW OWNER BLUE APPROVAL GREEN INSPECTION CARD

Step 2: Confirm project is complete in CHEERS

2. Confirm lot is complete in the HERS registry (CHEERS)

- Lot must have HERS verifiable measures COMPLETE. This can be found on the Project Status Report or ask your HERS rater for confirmation
- Registry documents do not need to be uploaded with your submission



Step 3: Complete Incentive Request Form (IRF)

3. Complete Incentive Request Form (IRF)

- This form will be provided to you after the project has completed technical review.
- Include project details
- Lot details, 1-10 lots per form
- Add your digital signature and date prior to submittal

Incentive Request Form 

Use the sections below to identify your project identity, location and contact information as well as the names of which programs your project is enrolled in.

APPLICANT 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 ☐

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

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 _____

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: _____	

Step 3: Complete Incentive Request Form – Project Details

Incentive Request Form

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

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

TRC

PROJECT INFORMATION		
Builder/Applicant Name ABC Builder	Contact Name Mickey Mouse	Phone Number (555) 123-4567
PROJECT INFORMATION		
Project Name River View Meadows	TRC APP ID APP-1234	Project City/Zip Code Sacramento / 95815
ENROLLED PROGRAMS		
Program Name CalEHP	Program Name CESHP	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.

Step 3: Complete Incentive Request Form – Lot Details

Lot#	LotAddress	Plan Name (must match HERS registry)	Residence Type
1	1234 River View Lane	Plan 1	Single Family
2	1235 River View Lane	Plan 2B	ADU
3	1236 River View Lane	6789	Single Family
Bldg 4	1237 River View Lane	987	Multi-Family

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

Step 3: Complete Incentive Request Form – Sign and Date

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: _____	

Step 4: Submit COO and IRF

4. Submit Incentive Request

- Upload IRF(s) and all associated COO's (*or permit card in lieu*) through the [Customer Application Portal](#)
- Notify your operations associate of your submission via email. *NOTE: This system does not send automatic notifications*

Incentive Request Process – Review

Four Easy Steps:

1. Collect Certificate of Occupancy (COO) from local jurisdiction
2. Confirm lot is complete in the HERS registry (CHEERS)
3. Complete the Incentive Request Form (IRF)
4. Submit COO and IRF by uploading to the TRC Customer Portal and notify your operations associate via email

IRF instructions are also hosted on the “Resources” page of the program websites:

[Resources - California Electric Homes Program](#)

[Resources - California Energy Smart Homes](#)

Incentive Request Process – What's next?

After submission, the program team completes the following steps:

- Confirms submitted lots are enrolled in the program(s)
- Confirms lots' construction is complete via the Certificate of Occupancy (*or permit card in lieu*) and that certificate is dated after enrollment date
- Confirms the plan type verified in CHEERS matches what was approved during technical review
- Requests approval for payment from respective program(s)
- Issues payment using check or ACH

IRF Submissions – Common Errors

- Submitted lots are incomplete in CHEERS
- Missing signature on Incentive Request Form
- COO date predates enrollment in program
- Submitting before project passes technical review
- Submitting for lots not enrolled in the program
- Submitting duplicates (lot was previously requested)



California
**ELECTRIC
HOMES**

Incentive Requests - Tracking for production builders



Tracking enrolled lots, IRF submissions, and payments

- Production builders should assume the responsibility of tracking their projects and associated IRF submissions throughout the duration of the program participation .
- The program team can provide helpful reports to support this effort, this information will include:
 - Lots/units/addresses enrolled in the program(s)
 - Project status within the program process
 - IRF submissions, payment status, and check details
- Contact your operations associate to request this report

Tracking enrolled lots, IRF submissions, and payments (continued)

Partial example of the “Developer Lot Report” available for production builders:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
	IRF ID 1	Status	Check Issue date	Check Number	IRF ID 2	Check Issue date	Check Number	Total Incent	Lead Code	Project Name	Lot ID	Address	Estimated Completion Date	IRF Received Date	Actual Completion Date	Program Name
147	APP-1461_006	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		356		12/31/2024	6/26/2025	8/28/2024	California
184	APP-1461_003	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		333		12/31/2024	6/6/2025	11/21/2024	California
186	APP-1461_006	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		354		12/31/2024	6/26/2025	8/28/2024	California
100	APP-1461_001	Paid	6/9/2025	RU#20433				\$ 3,000.00	APP-1461		241		12/31/2024	3/25/2025	12/16/2024	California
102	APP-1461_006	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		353		12/31/2024	6/26/2025	8/28/2024	California
116	APP-1461_003	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		331		12/31/2024	6/6/2025	9/25/2024	California
142	APP-1461_006	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		351		12/31/2024	6/26/2025	8/28/2024	California
146	APP-1461_007	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		239		12/31/2024	6/26/2025	5/28/2025	California
158	APP-1461_003	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		329		12/31/2024	6/6/2025	9/25/2024	California
162	APP-1461_003	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		350		12/31/2024	6/6/2025	10/2/2024	California
168	APP-1461_007	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		238		12/31/2024	6/26/2025	5/28/2025	California
177	APP-1461_006	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		349		12/31/2024	6/26/2025	8/28/2024	California
195	APP-1461_005	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		327		12/31/2024	6/26/2025	8/28/2024	California
197	APP-1461_006	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		348		12/31/2024	6/26/2025	8/23/2024	California
105	APP-1461_003	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		347		12/31/2024	6/6/2025	9/25/2024	California
109	APP-1461_005	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		326		12/31/2024	6/26/2025	8/28/2024	California
117	APP-1461_007	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		236		12/31/2024	6/26/2025	5/27/2025	California
119	APP-1461_005	Paid	8/6/2025	20500				\$ 3,000.00	APP-1461		325		12/31/2024	6/26/2025	8/28/2024	California
121	APP-1461_001	Paid	6/9/2025	RU#20433				\$ 3,000.00	APP-1461		252		12/31/2024	3/25/2025	2/26/2025	California



California
**ELECTRIC
HOMES**

End-of-Year Deadlines



End-of-Year Deadlines

Incentive levels decrease between 2025 and 2026:

- -\$500 single family
- -\$200 multifamily, ADU
- -\$500 manufactured home

Base Electrification Incentives per unit	2024	2025	2026	2027
Market-Rate				
Single Family	\$3,000	\$3,000	\$2,500	\$2,500
Multifamily/ Accessory Dwelling Unit	\$1,600	\$1,600	\$1,400	\$1,400
Manufactured Home	\$5,500	\$5,500	\$5,000	\$5,000

End of year deadlines (cont.)

Monday, November 17, 2025

- Project with lots completing in 2025 that have not yet cleared technical review must have all required documentation submitted by 11/17/2025
 - After technical review is complete, projects will have 45 days to submit incentive requests to receive 2025 incentive levels (applies only to lots completed in 2025).

Wednesday, December 31, 2025

- Projects that have completed technical review must submit incentive requests by EOD Wednesday, December 31, 2025, to receive 2025 incentive levels.

If you have a backlog of completed lots, start working on your incentive requests now!



California
**ELECTRIC
HOMES**

Conclusion



Conclusion

Submitting accurately and in a timely manner supports our financial and reporting responsibilities to the CEC and PG&E.

Our program applicants are critical to the success of these programs, and we truly appreciate your efforts.

Our program team is available to support the financial goals of your project(s).

Please reach out for additional assistance or clarifications!



Links

[Resources - California Energy-Smart Homes Program](#)

[Resources - California Electric Homes Program](#)

[Customer Application Portal](#)

CONTACT ENERGY-SMART HOMES

(833) 987-3935

caenergysmarthomes@trccompanies.com

CONTACT CALIFORNIA ELECTRIC HOMES

PHONE: (833) 987-3935

EMAIL: caelectrichomes@trccompanies.com



California
**ELECTRIC
HOMES**



California
**ELECTRIC
HOMES**

Discussion

