



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
- Additional tips
- Discussion/Q&A



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Introductions



Program Team Presenters

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Associate Project Manager



Kate Matasovsky
Incentive Processing Lead





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Incentive Requests



Program Refresher

California Energy-Smart Homes Program (CESHP)

- Administered by PG&E on behalf of the three electric IOUs (PG&E, SCE, and SDG&E)

California Electric Homes Program (CalEHP)

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

Dual Enrolled projects

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

Incentive Request Process

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*

Requesting Payment

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 OR otherwise cleared for occupancy by the appropriate jurisdiction
- When HERS/ECC measures are complete in the registry (CHEERS)

NOTE: Production builders can request as lots complete

ACH Payments

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

- California Electric Homes supports ACH payment options
 - Please reach out to your operations associate for assistance in setting up an ACH payment
 - Instructions from your banking institution **must** be provided
- California Energy-Smart Homes payments are **only** available via check

Payment Expectations

When can I expect payment?

- Program team submits for payment approval from the program administrators once a month, ~ 15th of each month
- Payment approval and subsequent check issuance or ACH may take up to 90 days*
 - Be sure to confirm the address on file and/or ACH instructions are correct with your operations associate

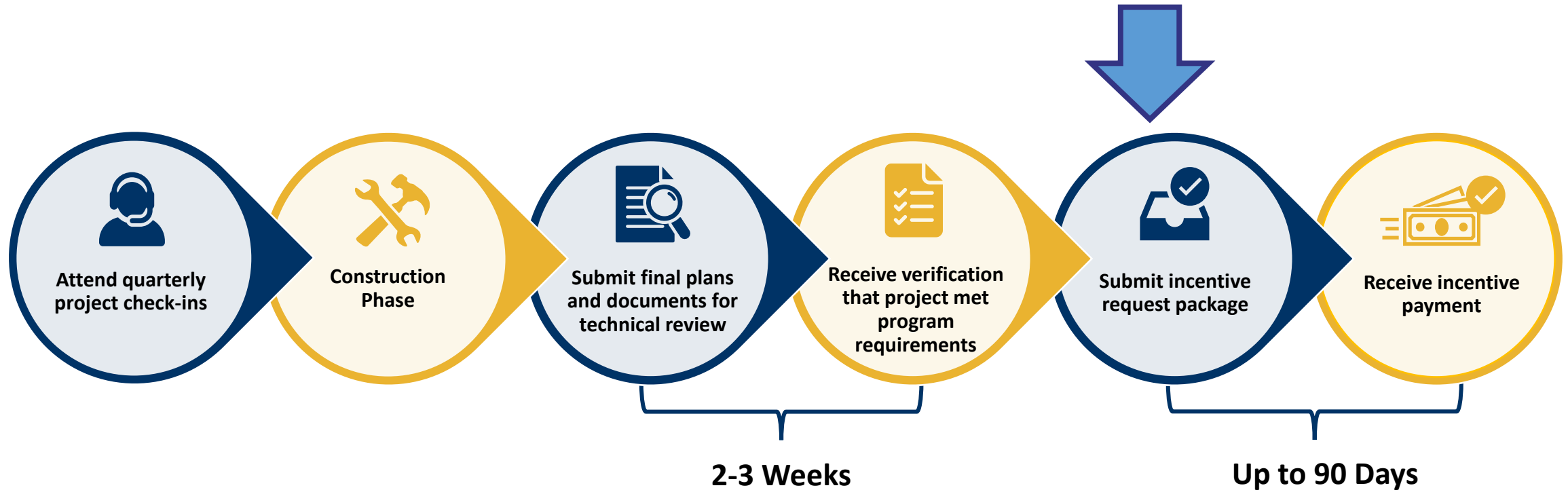
**PG&E may request a 3rd party field inspection prior to payment*

Energy-Smart Homes Payment Update

Incentive payments are expected to resume in 2027

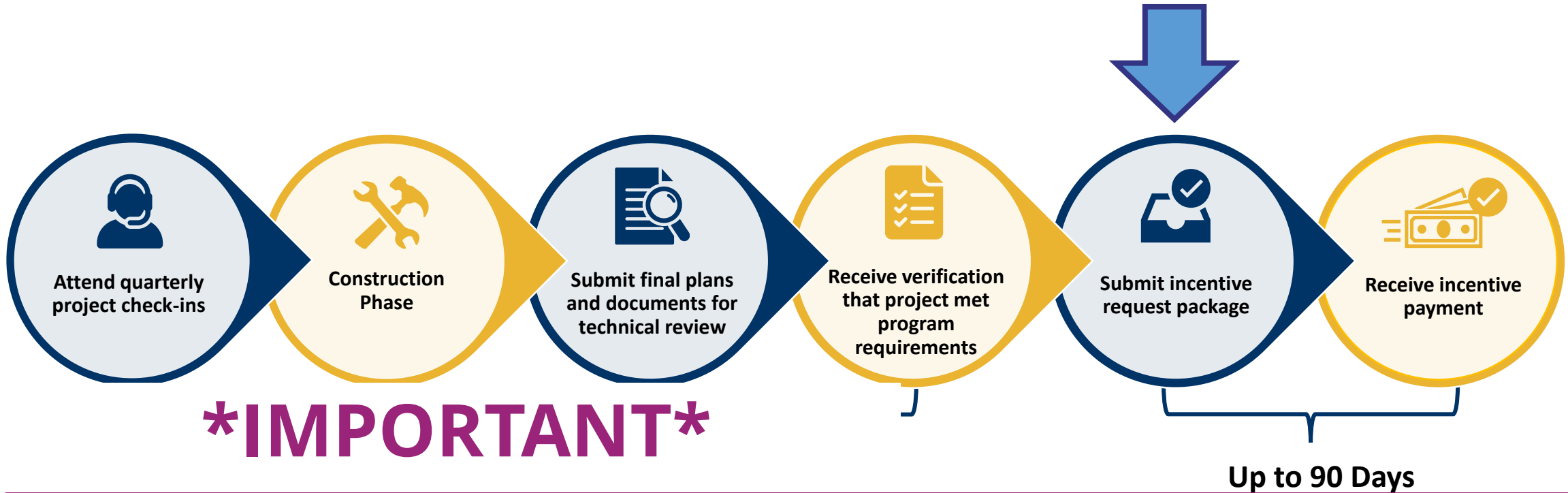
- We highly encourage you to submit incentives as lots complete to avoid any additional delay in payment
- Program updates will be provided via the FAQ on the program website and in the program newsletter
 - Newsletter sign up here: <https://ceshp.activehosted.com/f/3>

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/ECC registry (CHEERS)
3. Complete the Incentive Request Form (IRF)
4. Submit COO and IRF by uploading to the program's customer portal and email your operations associate to let them know

Step by step IRF instructions are also hosted on the “Resources” page of each program website

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
 - Confirm COO includes identifying information (address, lot ID, etc.)
 - Whenever possible, include only one COO (or permit card in lieu) per pdf file

COO Examples

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**
3232 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

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. Etc	1-18-24	
SLAB/REINFORCE			
PRE. GROUP			
GROUT			
UNDER FLOOR/ PLUMB	V. Etc	12/18/23	
UNDERGROUND PLUMBING			
GROUNDING ELECTRIC			
GROUND RODS			
WATER SERVICE			
SEWER	M.H. [REDACTED]	6/20/24	
FLOOR JOISTS	V. Etc	3-27-24	
EXTERIOR SHEAR	V. Etc	3-27-24	
FLOOR SHEATHING	V. Etc	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. Etc	3-18-24	
GAS TEST			
INSULATION			
DRYWALL	M.H. [REDACTED]	5/24/24	
POINT LATH		5/8/24	
WATER HEATER			
TITLE INSPECTION			
FINAL APPROVALS REQUIRED			
PLANNING/ZONING	AZ	9/18/24	Planning OK
FIRE	EC	9/18/24	
ENG/SANITATION	EC	7/26/24	
STRMWTR			
SOLAR PV - NEW CONSTRUCTION			
FINAL BUILDING APPROVAL		9/26/24	
Planning Authorizes issuance (Sign & date below)			
SIGNATURE: [REDACTED]			
FEE CLEARANCE:			GAS CLEARANCE:

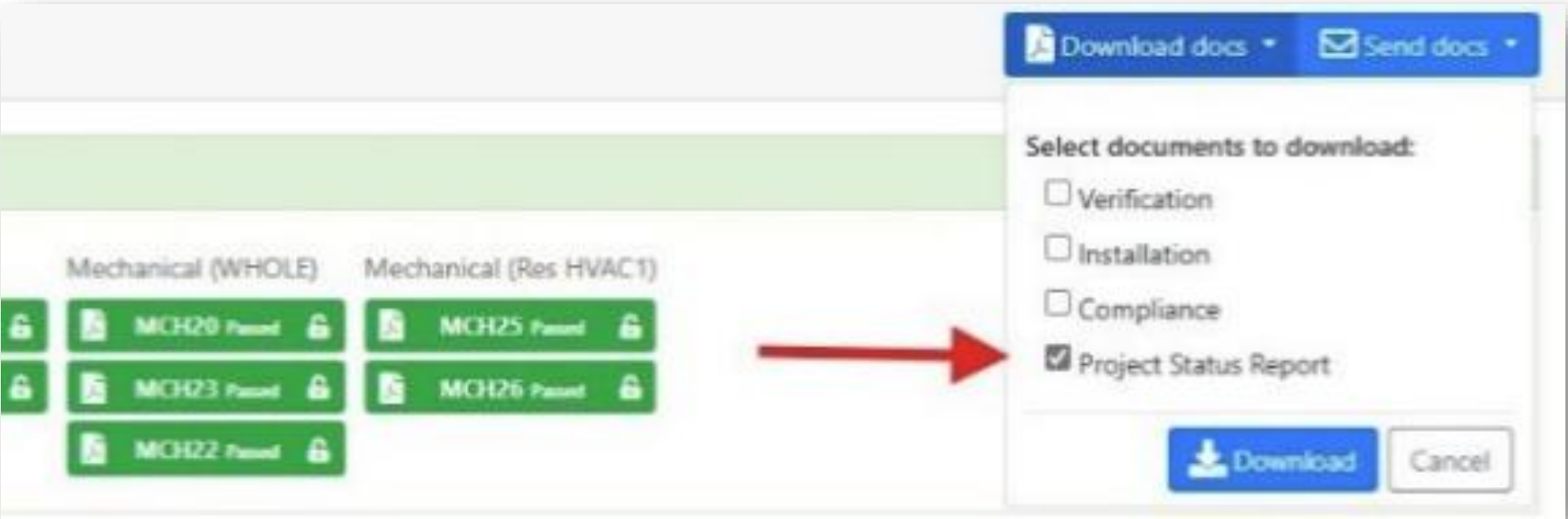
****FINAL BUILDING APPROVAL SHALL SERVE AS OCCUPANCY****
CALL FOR INSPECTION 24 HOURS IN ADVANCE- (619) 825-3808
WHITE CHECKLIST YELLOW OWNER BLUE APPROVAL GREEN INSPECTION CARD

Step 2: Confirm Project is Complete in CHEERS

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

- Lot must have all HERS verifiable measures marked as **COMPLETE**
 - Status confirmation can be found on the Project Status Report or ask your HERS/ECC rater for confirmation
- Permit date must be completed in each “site” (each address)
- Registry documents **do not** need to be uploaded with your submission

Confirm CHEERS Completion Status





CHEERS REGISTRY PROJECT STATUS REPORT



Scan to Validate

PROJECT SUMMARY

Project Name: [REDACTED]

Address: [REDACTED]

City, State, Zip: Sacramento, CA 95832

Building Department: [REDACTED]

Permit Number: [REDACTED]

Building Energy Code: 2022 Standards

HERS VERIFIABLE MEASURES	COMPLETE 
ENERGY CODE COMPLIANCE	COMPLETE 

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 all project details
- Lot details, up to 10 lots per IRF 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#	Lot/Address	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:	

IRF Applicant, Program, & Project

Incentive Request Form

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

TRC

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

PROJECT INFORMATION		
Builder/Applicant Name ABC Builder	Contact Name Mickey Mouse	Phone Number (555) 123-4567
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.

IRF Lot #, Address, Plan & Residence Type

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

IRF Signature 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: The Portal will not send an automatic notification***

Incentive Request Process - Review

Four Easy Steps:

1. Collect Certificate of Occupancy (COO) from the project jurisdiction
2. Confirm lot is complete in the HERS/ECC registry (CHEERS)
3. Complete the Incentive Request Form (IRF)
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Step by step IRF instructions are also hosted on the “Resources” page of each program website

Incentive Request Process – Next Steps

After submission, the program team will complete the following:

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

IRF Submissions – Common Errors

- Submitted lots are incomplete in CHEERS
- Lot permit date is missing in CHEERS
- Missing signature on IRF
- COO date predates enrollment in program
- COO does not include identifying information
- Submitting before project passes technical review
- Submitting for lots not enrolled in the program
- Submitting duplicates (lot already requested payment)



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Incentive Requests - Tracking for production builders



Tracking enrolled lots, IRF submissions, and payments

- Production builders are responsible for 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 and can provide the following information:
 - 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

Developer Lot Report

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



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End-of-Year Deadlines



End-of-Year Deadlines

Energy-Smart Homes (and dual projects) incentive levels decreased between 2026 and 2027:

Incentives			
New Construction Project Type	2025	2026	2027
Single Family/Duplex/Townhome	\$3,000	\$3,000	\$2,500
Multifamily Low-Rise	\$1,600	\$1,600	\$1,400
ADUs	\$1,600	\$1,600	\$1,400

California Electric Homes (CalEHP) experienced the step-down in 2026. Incentive levels currently reflect the 2027 rates shown.

2026 End-of-Year Deadlines

Tuesday, November 17, 2026

- Projects with lots completing in 2026 that have not yet cleared technical review must have all required documentation submitted by 11/17/2026
 - After technical review is complete, projects will have 45 days to submit incentive requests to receive 2026 incentive levels (applies only to lots completed in 2026).

Thursday, December 31, 2026

- Projects that have completed technical review must submit incentive requests by EOD Thursday, December 31, 2026, to receive 2026 incentive levels.

Registry documents (CHEERS) must be complete by 12/31/2026 to receive 2026 incentive levels

Lots submitted beyond the 2026 deadlines will not be eligible for Advanced Technology Bonuses

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





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Tips from the Top



Steps for Success

- Submitting accurately and in a timely manner supports our financial and reporting responsibilities
- Program applicants are critical to the success of these programs, and we truly appreciate your efforts
- Our program team is ready and available to support the financial goals of your project(s)
- Reach out for additional assistance or clarifications!



Key Links

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

[Resources - California Electric Homes Program](#)

[Customer Application Portal](#)

CONTACT ENERGY-SMART HOMES

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Discussion

