



California Advanced Homes Program™
Adjustment Application Checklist
(Pacific Gas & Electric Service Territory Only)



This checklist serves as a guide to the Project Adjustment process. We highly recommend you use this sheet while filling out the adjustment application form in order to avoid any processing issues that could delay your adjustment requests. Please feel free to contact a California Advanced Homes Program (CAHP) Program Assistant (cahp@trcsolutions.com) at any time if you should have any questions or require assistance.

The builder must fill out and submit the adjustment application whenever there are changes to the following:

- Incentive Kickers are being removed or added.
- Projects wish to add lots
- New plan types need to be added to an already approved project
- Adjustments to existing plans were made after the project was approved and they need to be re-submitted for approval. ANY changes that impact energy use, big or small, should be submitted to us for approval before construction begins.

CAHP enrolled projects may only receive incentives for approved plan types. In the course of construction, it is common to introduce added plans, or adjust existing plans. Both scenarios require program approval before incentive payments can be made. If a kicker is being added to a 2016 code project, the completed Program Incentive Calculator must be included in the adjustment application package per plan. Adjusted or added plans may be lot-specific, apply to all future uses of a given plan, or be universal to all plans in the project.

What is an added plan?

- Completely new plan type in the community
- New options on an existing plan type that alters the conditioned floor area
- Significant and systematic changes to the energy measures of an existing plan type (i.e. changing from fiberglass to spray foam insulation or completely altered HVAC systems)

Added plans must be applied for and approved before construction may proceed beyond the drywall stage and before any HERS tests are performed.

What is an adjusted plan?

The need for an adjusted plan is often triggered by a mid-construction situation (such as a failed HERS test). Plan adjustments must be submitted for approval before an Incentive Request Form (IRF) is submitted for those lots. However the pre-drywall and HERS test eligibility limit is not enforced for adjusted plans.

Examples of when an added or adjusted plan may be necessary:

- Changes to energy measures of an existing plan type (envelope, equipment, HERS tests)
- Changes to, failing, or not performing the required HERS tests of an existing plan
- Customized design adjustment to respond to a home-buyers request
- Changes to product or equipment specifications
- As-Built adjustments for custom homes
- The HERS rater is unable to ethically verify that the energy features detailed on the plan model were installed (window specs, equipment efficiencies, special features such as cool roof, radiant barrier or thermal mass, etc.)

What do I need to submit?

- CAHP Adjustment Application form
 - Information needs to be filled out on the application ENTIRELY. This includes:
 - Basic project information such as builder name, project name, TRC project number, and project address. You can refer to your accepted application sent to you in your acceptance package. If you need another copy of this document, please contact a CAHP Program Assistant and it will be re-sent to you via email.
 - All possible adjustments are listed on the form. For clarification purposes, be sure to check “no” on the changes you are not making rather than leaving it blank. For plan adjustments, enter adjustment specifics in the details box.
 - Be sure to have the project contact sign the adjustment application. You may do this using either an electronic signature set up through Adobe or a wet signature. By signing the form you are certifying that you have: completed all information accurately and entirely and have supplied all the proper adjustment documentation listed below.
- New and/or adjusted Title 24 documents (preferably created using already approved plan files as a base, when applicable)
 - CF-1R signed by an approved CEA
 - CAHP Incentive Report (CIR) (2013/2016 Code Projects)
 - ACR or Util-1r Form (2008 Code Projects)
 - Performance simulation file (RIBD or BLD)
- Plan sets for all new plans being added to the project
- Specification sheets for any revised or added plans with new equipment
- Lot list containing addresses for all new lots. For projects under the 2016 code, please include the orientation for each lot.
- If adding kicker(s) to a 2016 code project, the Program Incentive Calculator must be submitted for each plan the kicker is being added to.

Submit to TRC via email: cahp@trcsolutions.com