

Please note that in addition to the checklist provided in the handbook, we are also requiring that you submit a **PG&E service territory verification, share the project with TRC Energy Services on the appropriate HERS registry, and complete the CAHP enrollment survey.** Below is a list of items required at application:

1. Submit a Letter of Interest (optional):

- A [Letter of Interest \(LOI\)](#) may be submitted to express the applicant's intent to participate in the CAHP and that **a complete CAHP application package will follow within 90 calendar days of LOI submittal.** If applicant complies with LOI program timelines, the eligibility date for the project will be the date the signed LOI is received.
- Should the applicant fail to comply with the LOI timelines, the project's eligibility date will be the date a complete application package is received. Any lots that have sheetrock or drywall installed, or have had HERS testing performed prior to the project eligibility date will be ineligible to receive CAHP incentives.

2. A complete set of construction plans which contain the following:

- Architectural, Electrical, Mechanical, and Plumbing (as applicable or available)
- A window and door schedule showing sizes and includes ALL skylights (if not shown on the floor plan)
- Elevation, wall, roof, floor construction assemblies
- Floor finish schedule (if CF-1R shows High Mass Design)
- Plans must be submitted electronically as a PDF file
- PLAN SIZE MUST BE FULL OR HALF SIZE

3. A list of lots and addresses:

- The orientation for each lot MUST be listed next to the address.
- Be aware that any lots that have begun HERS testing or that have already installed drywall PRIOR TO the project's eligibility date will NOT be eligible to receive incentives. Please be sure to remove any such lots from your application and lot list.

4. A site plan with a North arrow

5. PG&E service territory verification:

- This can be a 'will serve letter', an 'account statement', a service application, or any documentation issued by PG&E verifying that the project address is or will be receiving Gas and/or Electric service from the utility.

6. Title 24 forms and files:

- PDF copy of the Certificate of Compliance Form (CF-1R) signed by a Certified Energy Analyst (CEA) and the CAHP Incentive Report (CIR) / CAHP Incentive Calculator per plan.
- Electronic input files that generated the signed Certificate of Compliance Form (preferably via e-mail). This file will have file extension ".bld" for EnergyPro or ".RIBD" for CBECC-Res, ".CIBD" for CBECC-Com. Please note – only plans on the application should be submitted and uploaded.
- If any kickers are being taken, the Program Incentive Calculator must be completed for each plan the kicker is being applied to. If we do not receive the incentive calculator for a plan, the plan will be enrolled without any kickers.

7. Equipment and materials documentation:

- Windows, glazed doors, skylights—specification sheet with manufacturer’s name that demonstrates U-factor and Solar Heat Gain Coefficient (SHGC).
- Space heating equipment—specification sheet with manufacturer’s name/model number and efficiency rating for each unit.
- Air conditioner—specification sheet with manufacturer’s name/model numbers for condenser/coil match or AHRI reference number for each proposed unit (www.ahridirectory.org).
- Water heater—specification sheet with manufacturer’s name/model number and efficiency rating. If installing a Solar Water Heater, a CF-SR is required.

8. HERS registry sharing by your HERS rater:

- For **CalCERTS**:
 - Please share the project with “TRC Energy Services” in the registry.
 - If we do not appear in your list of Energy Consultants you may need to add us.
 - If you or your rater need registry sharing instructions please contact us immediately at rnc@trcsolutions.com and we will provide detailed instructions.
- For **CHEERS**:
 - Please add “TRC Solutions” to the project member team.
 - If the project is a custom home, let us know who is listed as the “builder”.

9. Complete the CAHP Enrollment Survey:

- Please complete the CAHP Enrollment Survey located [HERE](#). The survey is available to you now and may be accessed anytime. The TRC ID will be assigned to this project by the Program Assistant once an application package submission has been received. Contact us at cahp@trcsolutions.com if you are unsure what this number is.
- This survey must be completed once per program cycle by the home owner or builder.

10. Submit a W-9 Form:

- Please submit a W-9 Form for the Tax ID or Social Security Number listed on your application.
- This should be completed by the payee.

If applicable to your application:

- Roofing material—specification sheet which shows emissivity and reflectivity value of Product (if taking credit for a cool roof).
- Specification sheets for any special features as included in your Title 24 calculations report.

Once the application package is complete the project will then move to plan review. After plan check is complete the project will be submitted to PG&E for final approval and enrollment in the program. At that point incentives will be reserved for the project. **Please be aware that according to submittal requirements, projects will not be accepted after drywall has been installed or HERS testing has begun unless the eligibility date has been reserved.**

Applications packages can be submitted by Email: rnc@trcsolutions.com

Let us know if you have any questions or need any assistance with the application process.