

2013



PARTICIPANT HANDBOOK AND PROGRAM AGREEMENT FOR SINGLE-FAMILY AND MULTI-FAMILY NEW CONSTRUCTION PROJECTS



We're here to help builders today for tomorrow's environment.

California's Investor-Owned Utilities, Pacific Gas and Electric Company, Southern California Edison, Southern California Gas Company and San Diego Gas & Electric Company are working together to help the building industry design and develop more environmentally friendly communities.

Our California Advanced Homes™ Program highlights best practices in energy efficiency, green building and sustainability, and offers generous financial incentives to help builders and architects create environmentally friendly, energy-efficient communities for potential home buyers.

Visit us online at: www.californiaadvancedhomes.com







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Appendix I: 2013 CAHP Incentive Agreement

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1. Program Overview

The 2013 California Advanced Homes Program serves to encourage residential new construction to meet two visionary goals set forth by the California Public Utilities Commission (CPUC). The first is for 90% of residential new construction to be built to at least 20% better than the 2008 code by 2015. The second is for all new homes to reach Zero Net Energy (ZNE) by 2020.

2. Glossary of Terms

Throughout this document, acronyms of certain terms have been used to simplify instructions. The following is a list of these terms:

ACR: Above Code Report

BIG: Build It Green

CABEC: California Association of Building Energy Consultants

CAHP: California Advanced Homes Program

CalCERTS: California Certified Energy Rating & Testing Services (HERS Provider)

CEA: Certified Energy Analyst

CEC: California Energy Commission

CEPE: Certified Energy Plans Examiner

CF-1R: Certificate of Compliance

CF-4R: Certificate of Field Verification and Diagnostic Testing

CF-6R: Certificate of Installation

CHEERS: California Home Energy Efficiency Rating Services (HERS Provider)

CPUC: California Public Utilities Commission

GPR: GreenPoint Rated

HERS: Home Energy Rating System

IOU: Investor-Owned Utility

LEED-H: Leadership in Energy and Environmental Design for Homes

MECH-1-C: High-Rise Mechanical Certificate of Compliance

MF: Multi-Family

NFRC: National Fenestration Rating Council

PERF-1: Performance Certificate of Compliance

Rater: Inspector-certified by a CEC approved HERS provider to provide third-party verification for Title 24 measures.

RNC: Residential New Construction

RNC-MFHR: Multi-Family High-Rise

RNC-MFLR: Multi-Family Low-Rise

SF: Single-Family

SHGC: Solar Heat Gain Coefficient

USGBC: United States Green Building Council

Util-1: High-rise energy savings and estimated incentive calculation form

Util-1R: Low-rise and single-family savings and estimated incentive calculation form

3. Introduction

The CAHP is offered through a diverse portfolio of programs by the IOUs. Participation is open to single-family, low- and high-rise multi-family residential new construction built in an IOU service area.

Multi-family projects built in PG&E's service area are administered by a third-party program and are eligible for separate incentives. Please see Section 8 for contact information.

The CAHP is a comprehensive residential new construction concept with a cross-cutting focus on sustainable design and construction, green building practices, energy efficiency, and emerging technologies. Through a combination of education, design assistance and financial support, the CAHP works with building and related industries to exceed compliance with the California Code of Regulations, Title 24, Part 6, 2008 Building Energy Efficiency Standards for Residential and Nonresidential Buildings (Standards), to prepare builders for changes to the Standards and to create future pathways beyond compliance and traditional energy savings objectives.

The CAHP is designed for the performance-based approach for compliance. Compliance with the 2008 Title 24 Standards must be demonstrated through the performance method utilizing approved California Energy Commission (CEC) compliance software. The documents must be created and signed by a Certified Energy Plans Examiner (CEPE). Compliance must be demonstrated for the building as a whole and may not group unrelated or detached buildings together.

4. General Requirements and Eligibility

The CAHP is funded under the auspices of the CPUC and funding, incentive levels and program requirements may be revised during the program cycle. Applicants must contact their IOU representative prior to submitting an application (see Section 8 for contacts).

4.1 Program Requirements

1. Incentives are only available to the participating builder for commodities that are provided by CAHP utilities.
2. CAHP incentives are available only for homes built to exceed 2008 Title 24 code.
3. Project must be submitted as detailed in Section 4.2, #3 prior to any HERS testing beginning or drywall being installed on the units applying for incentives. Please check with your HERS rater prior to submitting your applications packet to ensure the lots indicated on your application and lot list are eligible. All participating units must be New Construction dwellings and modeled accordingly.
4. Applicant agrees that he shall not accept duplicate funding from multiple utility-sponsored energy-efficiency programs for the same measures. Measures that save multiple fuel types can accept funding for EACH fuel type from ONE utility.
5. Participating projects must meet minimum program requirements for all homes within the same project, built after the date the Agreement is submitted. To ensure compliance of all homes when submitting a project using cardinal orientation, all plan types must comply in all orientations.
6. For verification purposes, all projects must contract with a certified HERS rater, even if HERS measures are not required. The HERS rater will be required to enter project verifications into the utility's upload of the project to the HERS registry. This may require duplicate HERS verification entries into the registry as the utility cannot access the HERS verifications entered for city permitting purposes.
7. Incentive payments are available only to owners, builders or developers named on the Agreement.
8. Funds are limited and will be reserved on a first-come, first-served basis to projects that meet the program requirements. No payments will be made for any changes made to the unit that may affect compliance without prior written approval from your utility representative.
9. Contact your utility representative for additional program details and funding availability prior to submitting applications.
10. The funding for this program will expire December 31, 2016 or sooner. The IOUs will not accept agreements after December 15, 2013. Agreement is valid for 36 months from date of utility acceptance.

4.2 Program Process Overview

Contact your CAHP representative prior to submitting the Agreement and prior to construction to ensure that you have the most current CAHP information available. **Programs and/or incentive levels may be changed or cancelled without notice.** You will be appointed a utility representative that will guide you through the entire process and to whom you will submit application materials. Submit the following to your utility representative for each plan type within the project:

1. A completed original 2013 California Advanced Homes Agreement postmarked or received by utility no later than December 15, 2013, or sooner if funds are expended or fully committed. Complete one application per project and list all plans/models and building types.
2. A completed Appendix II Plan Review Checklist.
3. Title 24 energy compliance computer run CF-1R with attached Utility Estimated Incentive Calculation Worksheet (Util-1R for EnergyPro or ACR for Micropas) created and signed by a CEPE. Please ensure the Util-1R or ACR includes the calculated estimated incentive amount. Contact your utility for help with this.
 - Single-family and low-rise multi-family projects may require a hard copy of the final Title 24 CF-1R and Utility Estimated Incentive Calculation Worksheet for each plan type.
 - High-rise multi-family projects require a hard copy of the final Title 24 PERF-1 Form, MECH-1, MECH-2, MECH-3, MECH-4, MECH-5 (if duct credit is claimed), ENV-1, ENV-2, and Utility Estimated Incentive Calculation Worksheet for each building type.
 - **Multi-family buildings up to 25 units may utilize the unit-by-unit modeling approach. Buildings with more than 25 units must be modeled using the whole-building approach.**
4. The electronic input file for the Title 24 energy compliance computer run for each model as constructed. This may be submitted on a CD or by email to the CAHP representative. Accepted electronic files are .MP8 for Micropas and .bld for EnergyPro.
5. A complete set of construction plans including:
 - A set of architectural plans including floor plans, elevations and sections.
 - A subdivision lot map with North arrow for production home projects and multi-family projects.
 - A site plan with North arrow for custom homes.
 - A copy of the tract map (tentative or recorded), construction schedule with phases, lots and addresses when available.
6. Applicant contracts with a Certified Energy Plans Examiner (CEPE) to prepare the Title 24 documentation and secures a Home Energy Rating System (HERS) rater. Once a HERS provider has been selected, the project must stay in the designated registry for the duration of the contract.
7. Applicant contacts his utility representative to discuss the project viability.
8. The Utility may provide design assistance within reason for viable projects. **The Utility will not provide funding for Title 24 documentation authors to reconstruct models or plans in the event of needed corrections.**
9. Upon completion of utility plan check, your utility will provide you with a letter of acceptance and Request for Payment forms.

Read all CAHP Instructions, Requirements, and Terms and Conditions contained herein. For additional program information, speak with your utility representative. The Applicant listed on the Agreement is responsible for submitting documentation that verifies compliance with CEC requirements to the utility's satisfaction.

In cases where measures and construction elements may vary from default or minimum efficiency values, CAHP requires supporting specifications sheets. Sign the Agreement and submit the package to your utility representative. Projects must be submitted as a complete package. Incomplete application packages will be returned to the applicant.

Once you receive written approval from the utility:

Construction and Inspection Phase

1. Ensure all applicable CF-6R forms are uploaded to the chosen HERS Registry for each home.
2. If applicable, obtain the appropriate CF-4R HERS rating certificates for each home upon completion of field verification; certificates must be submitted for the tested house (at least 15% or 1 in 7; see CEC HERS testing protocol Chapter 7.4 Res ACM Manual) and for the non-tested homes in the same sampling group. Be aware that the HERS Rater will be inspecting to ensure that all program measures are installed. Projects with “failures” are subject to CEC re-testing procedures and related fees at applicant’s expense.
3. Before any inspections are uploaded to the HERS registry, notify your utility of any changes that will affect total energy use of the home, such as added or relocated windows, addition of “bonus” rooms or other areas not shown on the Title 24 submittal, changes in proposed HVAC or water heating equipment, and/or changes to building insulation. **Changes made without notification may forfeit incentive payment.**
4. If applicable, submit all additional documentation as requested by your utility or as shown on the Request for Payment form (e.g. lot site map with north arrow, etc.).

Verification by Utility

Prior to paying incentives, the utility will review all inspection documents to ensure CAHP compliance. The utility retains final authority to determine CAHP compliance and eligibility for incentives. Mail or email all correspondence to your utility representative.

4.3 General Building Requirements

To qualify for the incentive payment, each home covered by the Agreement must be:

1. A new construction project/home receiving electric distribution and/or natural gas distribution service from your local IOU. If the home only receives EITHER gas or electricity from the IOU you are applying to, it is only eligible for incentives related to that service. Seek the guidance of your utility representative to ensure incentives are maximized for both gas and electricity. Homes served by propane will not receive an incentive for propane savings.
 - A single-family detached dwelling or two-dwelling building of any number of stories, R-3 occupancy, and on local IOU residential rates. Structures detached from the primary residence that are residential living areas (e.g., casitas) must also meet all CAHP criteria but are not eligible for a separate incentive. **OR**
 - A residential individually metered multi-family low- or high-rise project. CAHP also accepts master metered multi-family affordable housing projects. Please seek your utility representative’s guidance.
 - Permitted under the 2008 Energy Efficiency Standards Residential Compliance Manual (Title 24) effective January 1, 2010 and achieving compliance using a CEC-approved computer method. The Prescriptive Compliance Method is not eligible. Project must meet, at a minimum, CEC and CAHP installation and field verification requirements, as documented by a certified HERS Rater. **OR**
 - A high-rise residential multi-family building, Occupancy Group R, division 1 with four or more habitable stories. Built to exceed the 2008 Energy Efficiency Standards Nonresidential Compliance Manual Title 24 standards by a minimum of 15% for the applicable CEC-specified climate zone.
2. The following facilities do not qualify for participation: remodels, additions, mobile homes, residential care facilities, hotels, motels and dormitories. Community facilities qualify only if they contain at least one dwelling unit. The Utility offers a broad portfolio of other programs that may provide support to these facilities. Whole house retrofits may qualify, please contact your utility representative.

To afford an even distribution of funds for projects under this program, owners, builders, and developers may be required to demonstrate the viability of the project for which they are applying. Following the approval of the Agreement and within a three (3) month period, the applicant may be asked to supply documents that reflect a commitment to timely construction. The following documents may be required:

- Grading permit
- Building permit
- Approved construction schedule from the governing entity
- Financing and other pertinent documents

If, after review of these documents, the utility determines that the project is not progressing, the Agreement may be cancelled. If these documents are not available, the applicant must demonstrate that the project is in the process of obtaining construction permits. If this Agreement is cancelled, the applicant may reapply at a later date. Applications will be accepted and estimated incentives will be committed based upon the funds available at the time of reapplication.

The following defines the dwelling unit types that are program participants.

Single-Family Project Building Design Type

Detached: A single-story or multiple-story structure consisting of one unit not attached to another building (except a garage or casitas). This may be either a custom home or part of a larger project consisting of multiple units/lots.

Duplex: A structure consisting of two dwelling units. The duplex can be a single structure or part of a larger project consisting of multiple structures and units but must be modeled as two separate units.

Manufactured Housing: If a project is held to HUD standards rather than Title 24 standards, it may qualify for the Manufactured Housing Program instead of CAHP.

Multi-Family Project Building Design Type

Attached/Condominium: A single- or multiple-story structure consisting of three or more dwelling units. The dwelling units are owned by the occupants.

Apartment: A single- or multiple-story structure consisting of three or more dwelling units. The dwelling units are not owned by the occupants.

Non-Qualifying Facilities

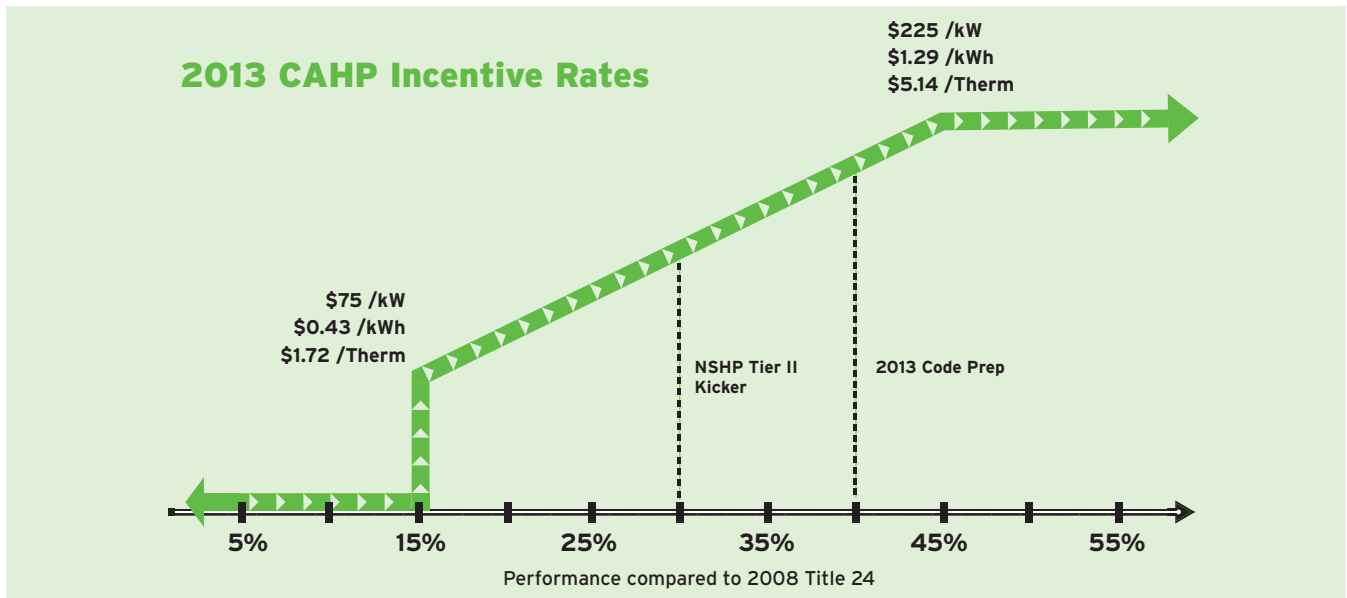
The following facilities do not qualify for participation: remodels, additions, mobile homes, residential care facilities, hotels, motels and dormitories. Community facilities qualify only if they contain at least one dwelling unit. The IOUs offer a broad portfolio of other programs that may provide support to these facilities. Whole house retrofits may qualify for other IOU programs, please contact your utility representative.

5. Financial Incentives

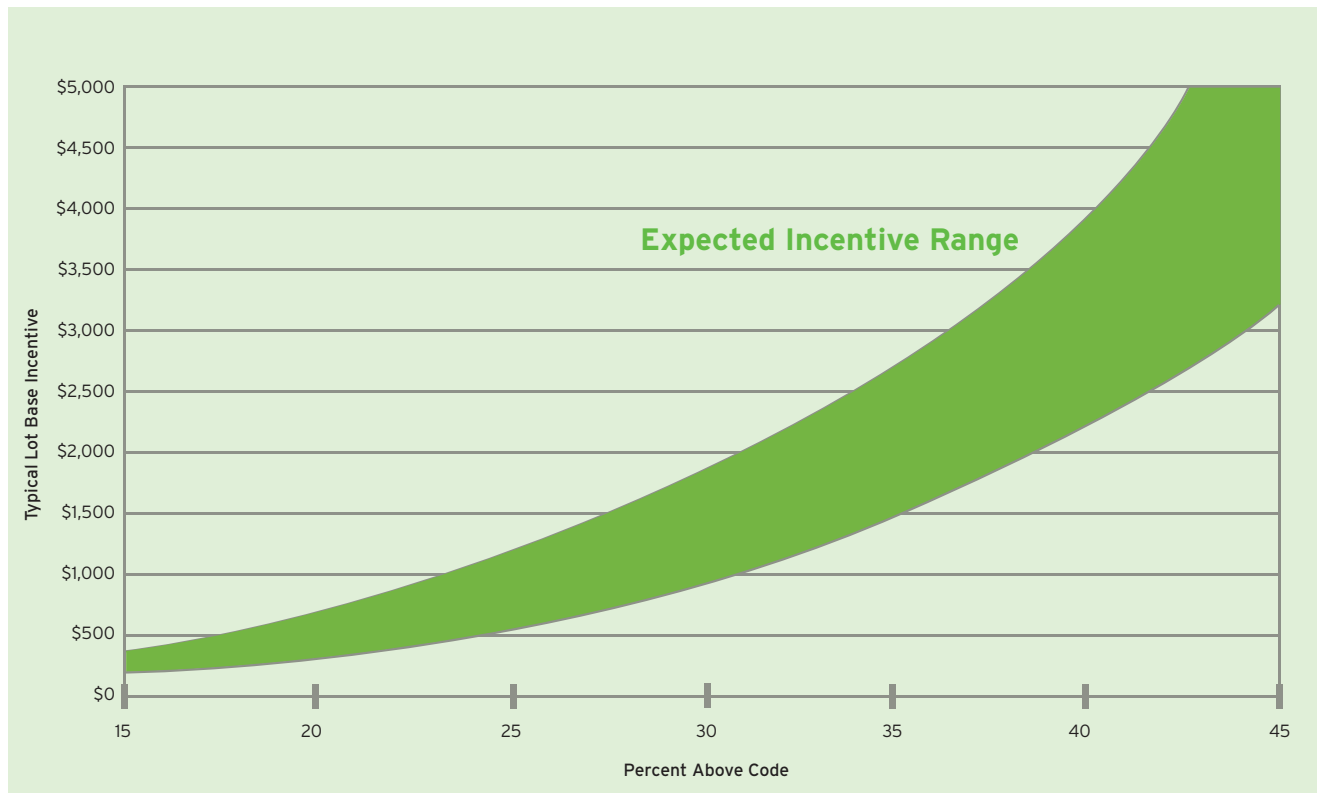
5.1 Baseline Financial Incentive

The baseline entry level of the program is 15% above the 2008 Title 24 building code with the estimated incentive payments based on the final 2008 T-24 reports created and signed by a CEPE and verified by a third-party HERS Rater. The estimated incentives increase incrementally as the performance of the structure increases. Multi-family projects in PG&E's service area are covered under another program. Please see Section 8 for contact information.

A calculator for the estimated incentives is provided in the Agreement and based on the Utility Estimated Incentive Calculation Worksheet generated by the input file. Applicants may be required to demonstrate the viability of the project they are submitting. The structure of the baseline financial incentives is as follows:



As projects advance to higher compliance margins, the amount of energy saved increases along with the \$/energy, as shown above. As a result, CAHP incentives are designed to compensate builders for the additional costs of reaching high compliance margins with significantly higher incentives. The following graph demonstrates an **expected** range of core incentives, based on a 2,100 square foot single family home. Approximately 90% of homes will fall within this range and this graph does not guarantee your project will receive these amounts.



5.2. Additional Financial Incentives

The 2013 CAHP offers additional incentives to projects that include one or more of the below project elements. Multi-family projects in PG&E’s service area do not qualify for these bonus incentives.

NOTE: Multiple kickers can be claimed on a project.

California ENERGY STAR New Homes Program–Marketing Support Bonus

Projects that comply with ENERGY STAR standards will be offered free ENERGY STAR marketing materials. IOUs will provide a materials catalog including banners, brochures, stickers and more. Each project will be given a budget of \$10 per multi-family unit and \$40 per single-family unit. Please contact your local IOU for details. ENERGY STAR is a national, voluntary program sponsored and developed by the United States Environmental Protection Agency (EPA) that promotes energy-efficient products, including homes. Homes that have earned the ENERGY STAR label meet the EPA’s performance guidelines for energy efficiency following third-party verification from an accredited organization. Further information can be reviewed at the EPA ENERGY STAR Internet site, www.energystar.gov.

2013 Code Preparation - \$1,000 Single-Family, \$200 Multi-Family

The CAHP aims to help prepare builders for future energy standards. During 2013 CAHP will provide the above incentives for projects that adhere to the following criteria:

1. Plan must exceed 40% above 2008 T-24 code
2. Plan must include the following measures:
 - Duct Leakage HERS measure
 - Verified Fan Watt Draw HERS measure
 - Verified Cooling Coil Airflow HERS measure
 - R-30 minimum Attic/Roof Insulation
 - R-19 minimum Floor over unconditioned space insulation

New Solar Homes Partnership (NSHP) Tier II—\$1,000 Single-Family, \$200 Multi-Family

In order to receive this kicker, the project's electricity must be provided by the IOU you apply to and every home in the project must participate. Applicants participating in the CEC's NSHP and meeting Tier II qualify by designing their projects to the performance level of 30% better than 2008 Title 24 with a 30% reduction in the cooling load for the CEC designated climate zone. Within an NSHP Tier II project, each single-family unit with solar installed will receive \$1,000 and each multi-family unit with solar installed will receive \$200. Please see Section 7 below for further details on NSHP.

Thermostatic Shower Restriction Valve—\$7/unit or \$15/set When Combined with Low-Flow Showerhead

Projects that install thermostatic shower restriction valves in SDG&E, SCG, or SCE service territories are eligible for this incentive. Large quantities of water and natural gas are wasted during the time that residents wait for their showers to heat up. These valves operate by shutting off the water flow once the desired water temperature has been reached. This measure is not allowed when combined with tankless water heaters or recirculation pumps. The incentive increases to \$15 per unit when combined with a low-flow showerhead. To qualify, the low-flow showerhead must pass test procedure ANSI/ASME A112.18.1-2000, Section 5.5, and have a flow rate equal to or less than 1.6 gallons per minute. This measure is not available on the Utility Estimated Incentive Calculation Worksheet. Please fill out "Low-Flow Showerhead/Thermostatic Shower Restriction Valve Installation Details" form to apply for this kicker. Project must meet core incentive CAHP requirements to be eligible for this incentive. Projects in PG&E's service area are not eligible for this bonus incentive.

6. Terms and Conditions

I, the Applicant, agree to the following terms and conditions ("the Agreement"):

1. I meet the CAHP eligibility requirements as stated in the appropriate attachment(s) included with this Application.
2. The information I have supplied on this Agreement and attachment(s) is true, correct and complete.
3. I have read and understand the terms and conditions of the Agreement and on the appropriate attachments and agree to abide by the rules, requirements and terms set forth on the Agreement and all attachments.
4. If the Agreement is terminated for any reason, Utility shall not be liable to the Applicant for damages or compensation of any kind.
5. Utility reserves the right to determine eligibility for the Incentive.
6. Utility makes no representation or warranty, and assumes no liability with respect to quality, safety, performance, or other aspect of any design, system or appliance installed pursuant to the agreement, and expressly disclaims any such representation, warranty or liability. Applicant agrees to indemnify Utility, its affiliates, subsidiaries, parent company, officers, directors, agents, and employees against all loss, damage, expense, fees, costs, and liability arising from any measures installed.
7. Both funding and the conditions of the incentive are subject to the jurisdiction of the California Public Utilities Commission (CPUC) and shall be subject to such changes or modifications as the CPUC may, from time to time, direct in the exercise of its jurisdiction. If there are changes in the estimated incentive, Utility will endeavor, but cannot guarantee, to provide a reasonable period of time before changes go into effect.
8. I understand that if the incentive is modified in any way or terminated by order of any government entity, then the Agreement shall be revised or terminated consistent with that order.
9. Utility may assign the Agreement, in whole or in part, or its rights and obligations hereunder, directly or indirectly, by operation of law or otherwise, without the Applicant's prior written consent, provided Utility remains obligated for payments incurred prior to the assignment. The Applicant may not assign this Application, in whole or in part, or its rights and obligations hereunder, directly or indirectly, by operation of law or otherwise without the prior written consent of Utility.
10. I understand the incentive requires inspections and measurements of the performance of the measures. Therefore, I agree to provide access to the Project Site for these purposes to Utility and/or its agents or assigns and the CPUC and/or its agents or assigns.
11. I agree to release Utility, its affiliates, parent company, officers, managers, directors, agents and employees from all claims, demands, losses, damages, costs, expenses and liability (legal, contractual, or otherwise), which arise from or are in any way connected with any: (1) injury to or death of persons,

including but not limited to employees of Utility, customer, or any third party; (2) injury to property or other interests of Utility, Applicant or any third party; (3) violation of local, state, or federal common law, statute, or regulation, including but not limited to environmental laws or regulations; (4) energy savings shortfall; so long as such injury, violation, or shortfall (as set forth in (1)–(4) above) arises from or is in any way connected with the Project, including any third party's performance of or failure to perform the Project, however caused, regardless of any strict liability or negligence of Utility, its officers, managers, or employees.

12. Energy savings for which incentives are paid cannot exceed the actual usage provided by Utility. Non-utility supply, such as cogeneration or deliveries from another commodity supplier, does not qualify as usage from Utility (with the exception of Direct Access customers or customers paying departing load fees for which the utility collects PPP or PGC charges).
13. Funding approved for this Incentive is limited and will be paid on a first-come, first-served basis to qualified applicants. Funds will only be reserved upon Utility's execution of the Agreement. This incentive offer is subject to the availability of authorized funds.
14. Installation of any energy-efficient equipment required for compliance with 2008 Title 24 will not qualify for incentives. Energy efficiency improvements beyond 2008 Title 24 requirements or a generally accepted industry standard, where applicable, may be eligible for incentives.
15. Specific restrictions may apply to each energy-efficiency system, as outlined in the instructions and attached project forms.
16. To be eligible for incentives, I agree that I will not apply for or receive incentives offered by local or state entities or other utilities for measures and associated fuel savings covered under this Agreement.
17. Utility may suspend or terminate the Agreement, without cause, upon written notice to me.
18. I understand the following Tax Liability provisions: Utility will report incentives greater than \$600 as income to me on IRS form 1099 unless: 1) I have marked the "Corporation" or "Exempt" tax status box, or 2) the Payment Release Authorization Form has been completed, in which the designated party will be responsible for tax liability. Utility recommends that I consult a tax adviser concerning the taxability of incentives. Utility is not responsible for any taxes that may be imposed due to incentive payments.
19. I understand once an acknowledgement receipt is issued for this Application under a Customized Energy Efficiency Program, the Application will be processed under that program. If the Application is withdrawn at any time in the process, I may only resubmit an Application for the same project in the same program, under specific circumstances approved by the Program Manager.
20. I understand the utility may use the services of external consultant(s) for plan review and/or other functions related to the submitted projects. I hereby authorize the utility to share any of the submitted project information with the consultants, expressly for this purpose.
21. I understand that program timing, rules and requirements may be modified by each utility in their territory, or by the program as a whole, at any time.

7. New Solar Homes Partnership

The New Solar Homes Partnership (NSHP) is part of the comprehensive statewide solar program, known as the California Solar Initiative. The NSHP provides financial incentives and other support to home builders, encouraging the construction of new, energy-efficient solar homes that save homeowners money on their electric bills and protect the environment.

To qualify as a partner in the NSHP program, builders must meet these basic requirements:

1. **Location:** Development must receive electric service from a California IOU.
2. **Energy Efficiency:** The new homes must meet or exceed Title 24 energy efficiency requirements by 15%, and are encouraged to reach Tier 2 (30% better than Title 24 and 30% improvement in the space cooling budget).
3. **Solar PV Roof:** Include a solar PV roof on at least one home within your development.
4. **New Solar Homes Partnership Guidebook:** Download an NSHP Guidebook from the CEC for complete information about the program and how to apply for your incentive with the appropriate forms. Projects are encouraged to participate in both the CAHP and the NSHP.

For additional information please go to www.gosolarcalifornia.ca.gov.

8. For More Information

Further information regarding the CAHP and participation can be obtained from a utility representative. The representative can work with the design team to determine which program path is best suited to the project and how to optimize its energy efficiency. Additionally, the utility offers design assistance for project review and training classes.

Contact Information

Pacific Gas and Electric Company

Phone: 866-352-7457 (CMFNH M-Fam/CAHP S-Fam)
Email: cahp@h-m-g.com
Email: cmfnh@h-m-g.com
Web: www.multifamily.h-m-g.com

Southern California Edison

Phone: 626-622-9182
Email: Monica.Leong@sce.com

Southern California Gas Company

Phone: 866-563-2637
Email: NewHomes@socalgas.com

San Diego Gas & Electric Company

Phone: 866-631-1744
Email: NewHomes@sdge.com

Additional information is available at www.californiaadvancedhomes.com.





Project Number (Internal Use Only) _____

2013 California Advanced Homes™ Program Single-Family/Multi-Family Incentive Agreement

Minimum energy use requirements for participation in the California Advanced New Homes Program: to qualify for an incentive each home must exceed 2008 Energy Efficiency Standards (Title 24) effective January 1, 2010 by a minimum of 15%. (This Agreement does not apply to PG&E's Multi-family Program. Please refer to the Handbook Section 8 for more information).

APPLICANT/PAYEE INFORMATION

Applicant/Builder Name		
Utility Representative		Payee Name
Federal Tax ID # (or) Social Security #		<input type="checkbox"/> Corporation <input type="checkbox"/> Non Corp <input type="checkbox"/> Individual <input type="checkbox"/> Exempt If exempt, describe why:
Payee Address	Payee City	Payee ZIP

PROJECT INFORMATION

Project Name		Climate Zone	
Project Address/Location		Project City	Project ZIP
Project Contact		Contact Telephone Number	
Fax Number		Email	
Permitting Agency		Permit Date	
Start Date		Estimated Completion Date	
HERS Provider	HERS Company		
HERS Email	HERS Address		
HERS Rater	HERS Rater Telephone Number		

PROJECT TYPE

Please Select Single-family or Multi-family:	<input type="checkbox"/> Single-family Please select housing type: <input type="checkbox"/> Custom Home <input type="checkbox"/> Production Home (2 or more units) <input type="checkbox"/> Duplexes (2 attached units)	<input type="checkbox"/> Multi-family Please select housing type: <input type="checkbox"/> Townhomes (3 or more attached units) <input type="checkbox"/> Low-rise (Less than 4 stories) <input type="checkbox"/> High-rise (More than 4 stories)
Are you participating in the New Solar Homes Partnership? <input type="checkbox"/> Yes <input type="checkbox"/> No		
What company is providing electricity to the project? <input type="checkbox"/> PG&E <input type="checkbox"/> Southern California Edison <input type="checkbox"/> SDG&E® <input type="checkbox"/> Other:		
What company is providing natural gas to the project? <input type="checkbox"/> PG&E <input type="checkbox"/> Southern California Gas Company <input type="checkbox"/> SDG&E <input type="checkbox"/> Other:		
Is a company providing propane to the project? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list company:		
Tract Number	Total # of Plan Types in Project	
Phase Number(s)	Lot Number(s)	
# of Units to Complete in: 2013 _____ 2014 _____ 2015 _____ 2016 _____ Total _____		

GENERAL INSTRUCTIONS AND REQUIREMENTS

- 1 Call your local utility representative for details and funding availability on the California Advanced Homes Program (CAHP) prior to submitting this agreement. Funds are limited and will be reserved on a first-come, first-served basis to projects that meet the Program requirements. No payments will be made for any energy-efficient upgrades installed without prior written approval from your local utility.
- 2 Review the CAHP Participant Handbook and Terms & Conditions.
- 3 Complete one form per project and list ALL plans/building types. Incentive payments are available only to owners, builders or developers named on the CAHP Incentive Agreement.
- 4 No projects will be accepted after drywall has been installed in enrolled units.



**Please provide the following documentation for participation in the
California Advanced Homes Program and/or New Solar Homes Partnership**

*The purpose of this checklist is to expedite the required plan check process.
Agreements submitted without the following documents will be returned to Applicant.*

Are you participating in the New Solar Homes Partnership? _____

A complete set of construction plans which contain the following:

- Architectural drawings (Electrical, Mechanical and Plumbing may also be required). When submitting electronic plans a CD is preferred.
- A window and door schedule that shows sizes and includes ALL skylights.
- Elevation, wall, roof, floor construction assemblies.
- Floor finish schedule (a.k.a. floor covering schedule) if CF-1R shows High Mass Design.
- A list of lots, addresses, and their respective plan numbers. Not available for custom homes.
- For custom homes, a site plan with North arrow. For subdivisions, a subdivision map with North arrow.
- Plans may be submitted electronically either as a PDF file or using a file extension of .dwf. PLAN SIZE MUST BE FULL OR HALF SIZE.

Title 24 forms and files:

- Certificate of Compliance Form (CF-1R for low-rise residential or a PERF-1 for high-rise residential) and the Utility Incentive Worksheet (Util 1-R from EnergyPro or ACR from Micropas) signed by a Certified Energy Plans Examiner (CEPE) or a Certified Energy Analyst (CEA)
- The 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 ".mp8" for Micropas

Equipment and materials documentation (if required by Utility):

- Windows, glazed doors, skylights—specification sheet with manufacturer's name that demonstrates NFRC rated 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) that has an efficiency rating GREATER than SEER 13, EER 11
- Water heater—specification sheet with manufacturer's name/model number and efficiency rating—If installing a Solar Water Heater, a CF-SR is required
- Roofing material—specification sheet which shows emissivity and reflectivity value of product
- Specification sheets for any special features as included in your Title 24 calculations report



Let Us Help Turn Your Blueprints Into Greenprints.

Development of sustainable and livable communities combines environmental protection, green building design, energy efficiency and land use planning integrated with the building design process. These innovative building practices also help you meet your bottom line.

Why It Pays To Exceed Building Standards

Designing energy efficiency into the homes you build helps reduce greenhouse gas emissions, differentiates your community, increases the comfort and indoor air quality of your homes and helps decrease your buyers' monthly utility bills.



Let Us Help You.

Energy-efficient appliances, equipment and building materials help homeowners save on utility bills while enjoying a comfortable and healthier energy-efficient home.

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