

# **New Solar Homes Partnership**

## **Web Tool Application Training**



**October 2014**

# Hardware and Software Requirements

The following minimum configuration is required:

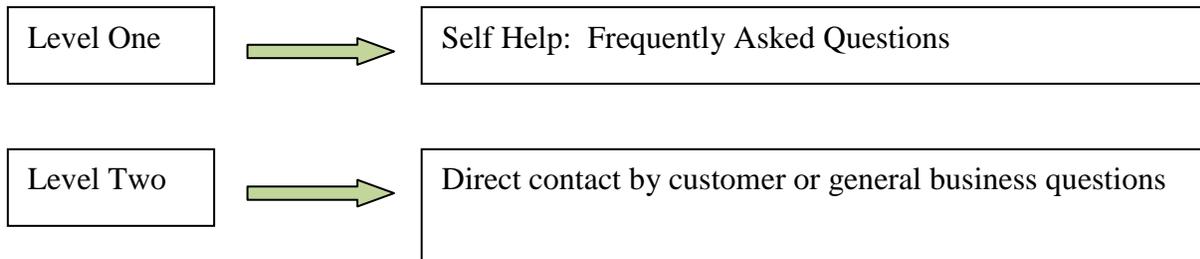
Standard PC or Mac with Microsoft Explorer v 7.0 is recommended.

## Installation

The web tool is a MS.NET database application running on SQL 2008. The application is accessed through Microsoft Explorer 7.0 or higher web browser, therefore, no application installation is required. In order to read documents stored within the web tool, **ADOBE PDF READER IS RECOMMENDED.**

## Customer Support

Customer support for the NSHP application process moves through two different levels. The customer can access Level One support through the NSHP web tool “Help/FAQ” link, which provides answers to commonly asked questions. Customers with additional questions should contact the Energy Commission’s Renewables Call Center. The Renewables Call Center should be able to address general inquiries on the NSHP program and NSHP web tool questions.



## Program Administrator

**California Energy Commission**  
New Solar Homes Partnership  
1516 Ninth Street, MS-45  
Sacramento, CA 95814  
Phone: 1-844-217-4925  
E-mail Address: [renewable@energy.ca.gov](mailto:renewable@energy.ca.gov)

## Summary of New Solar Homes Partnership Guidebook Requirements

The following table is a brief summary of program eligibility requirements. The applicant should refer to the most recent version of the *New Solar Homes Partnership Guidebook* located at: <http://www.gosolarcalifornia.ca.gov/about/ns hp.php> for more detailed descriptions of the requirements.

**Table 1-1: Summary of Program Eligibility Requirements (NSHP Guidebook, Eighth Edition)**

<b>Program Element</b>	<b>NSHP Requirement</b>
Eligible Technologies	Flat-plate photovoltaics only
Eligible Electric Service Territories	PG&E, SCE, SDG&E, and BVES
Eligible housing types	New residential construction, including total building renovations, common areas of housing developments, and qualifying mixed-use projects.
Eligible Equipment	New and not previously placed in service, and on the Energy Commission's eligible equipment website.
Reservation Period	36 months for qualifying large developments, all affordable housing projects (includes projects with a non-tax-exempt system owner), and virtual net metered projects. 18 months for all other projects.
Initial Incentive Level	Expected Performance-Based Incentive (EPBI) for Incentive Level 7 (tax-exempt affordable housing) and Incentive Level 7 (market-rate housing) based on the reference system receiving: <ul style="list-style-type: none"> <li>• \$1.50/watt for affordable housing residential units with tax-exempt system owners meeting Code-Compliant energy efficiency requirements,</li> <li>• \$1.85/watt for affordable housing residential units with tax-exempt system owners meeting Tier I or Tier II energy efficiency requirements,</li> <li>• \$0.75/watt for market-rate housing projects, affordable housing common areas, or affordable housing projects with a non-tax-exempt system owner meeting Code-Compliant energy efficiency requirements,</li> <li>• \$1.00/watt for market-rate housing projects, affordable housing common areas, or affordable housing projects with non-tax-exempt system owners meeting Tier I energy efficiency requirements, or</li> <li>• \$1.50/watt for market-rate housing projects, affordable housing common areas, or affordable housing projects with non-tax-exempt system owners meeting Tier II energy efficiency requirements.</li> </ul> Additional funding may be available from the utilities for meeting Tier I and Tier II energy efficiency requirements.
Incentive Level Adjustment	Volumetric trigger. Declines as pre-specified target MW volumes are reached.
Incentive Adjustments	Depends on geographic location, orientation, tilt, shading, and equipment efficiency.
Energy Efficiency Requirements	Code-Compliant: The building complies with the 2013 <i>Standards</i> . Tier I: Residential buildings that exceed the <i>Building Energy Efficiency Standards</i> in effect on the date the building permit is applied for by at least 15%. Tier II: Residential buildings that exceed the <i>Building Energy Efficiency Standards</i> in effect on the date the building permit is applied for by at least 30%. In addition, the space cooling margin must meet or exceed 30% better than standard. An ENERGY STAR® label is required for appliances provided by the builder for all projects.
Interconnection	Grid connected with eligible utility required.
Solar Energy System Installation Field Verification Checkpoints	Solar energy system installation, equipment, and performance shall be verified by the installing contractor and a certified HERS Rater.
<b>Program Element</b>	<b>NSHP Requirement for Tier I or Tier II</b>
Energy Efficiency Measures Installation Field Verification	Energy efficiency measures used to meet the Tier I or Tier II performance level shall be field verified by the installing contractor and a certified HERS Rater.

Source: California Energy Commission

**Table 1-2: Project Types and Required Reservation Application Documentation (NSHP Guidebook, Eighth Edition)**

Reservation Application Documents	Project Type						
	Affordable Housing Residential Dwelling Unit	Affordable Housing Common Area	Custom Home	Large Developments	Small Developments	Projects w/ Solar on Fewer Than 50% of Residential Units	Market-Rate Common Areas
Reservation Application Form: NSHP-1	X	X	X	X	X	X	X
Subdivision Map*, ***				X	X	X	
Building Permit**	X	X	X				X
EPBI Documentation							
NSHP PV-1 Compliance Form	X	X	X	X	X	X	X
Electronic Input Files (.emf, .her)	X	X	X	X	X	X	X
Energy Efficiency Documentation							
CF-1R Form	X	X	X	X	X	X	X
Electronic Input Files (.bld/.mp7, .mp8, .ribd)**	X	X	X	X	X	X	X
Plan Set and Checklist Items**	X	X	X	X	X	X	X
Utility New Construction Energy Efficiency Program Approval Letter***							
Lease Agreement/Power Purchase Agreement (PPA)							
Installation Contract****	X	X	X	X	X	X	X
Regulatory Agreement	X	X					

\*Applicants may provide either a tentative or final subdivision map or building permit as proof of residential new construction.

\*\*For projects complying with the 2013 Standards and applying for the Code-Compliant incentive, the electronic input file, plan set, and checklist items are not required to be submitted.

\*\*\*If the project is participating in the utility new construction energy efficiency program, then the applicant may submit the program approval letter in place of the building permit/subdivision map and energy efficiency documentation.

\*\*\*\*For systems that are self-installed, an equipment purchase agreement must be submitted in place of an installation contract

Source: California Energy Commission

# General Instructions – Getting Started

**Before beginning the online application process, please read the most recent edition of the NSHP Guidebook. You should also check to make sure that you have all of the necessary documents for a complete application (See Table 1-2).**

The NSHP web tool Home Page can be accessed by going to the web address: <https://www.newsolarhomes.org>. From the Home Page, further access to the application is based upon a user's log-in. There are two types of users: Homeowners (or builder/developer) and Representatives.



## Menu Navigation

NSHP Process: Quick overview of the application process

Help & FAQ: A list of Frequently Asked Questions and help information about the NSHP web tool.

Incentive Levels: List of current Incentive levels for all program activity.

Reports: Select program and project search criteria to download NSHP reporting data.

Sign Up: Select the NSHP customer type to apply to the NSHP program.

Login: Use previously created Login and Password to log onto the NSHP web tool.

Forgot Login: Open this link if you have forgotten your username.

Forgot Password: Open this link if you have forgotten your password.

## Creating an Account – Signing Up

In order to use the NSHP web tool, an applicant must first set up an account through the “Sign Up” process.

This account will be used to:

- Login
- Manage projects/sites
- Check application status

The applicant must have a valid email address in order to sign up.

Select the Sign Up link on the home page.

Select the type of customer that best describes you:

I am a Homeowner: A homeowner or developer who is planning to install solar equipment on one or more residential units.

I am a Representative: An agent that is representing a homeowner, builder or developer.

### Homeowner Sign Up

#### Sign Up for the New Solar Home Program (NSHP)

Select the type of NSHP customer that best describes you...

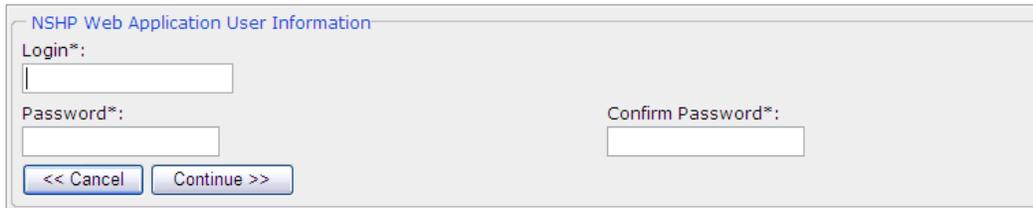


Select the *I am a Homeowner* Icon.

NSHP Web Application User Information

**Please Note: Asterisks (\*) noted are required fields. You will not be able to proceed until these fields have been completed.**

**Sign Up for the New Solar Home Program (NSHP)**



The screenshot shows a web form titled "NSHP Web Application User Information". It contains three input fields: "Login\*" (required), "Password\*" (required), and "Confirm Password\*" (required). Below the fields are two buttons: "<< Cancel" and "Continue >>".

Add Login information (Between 5 and 20 characters).

Add Password information (At least 8 characters) and confirm password.

Select the Continue button.

Personal Information

**Sign Up for the New Solar Home Program (NSHP)**



The screenshot shows a web form titled "Personal Information". It contains six input fields: "First Name\*" (required), "Last Name\*" (required), "Title", "Phone\*" (required), "Email\*" (required), and "Fax". Below the fields are two buttons: "<< Cancel" and "Continue >>".

Complete the Personal Information and select the Continue button.

## Address

### **Sign Up for the New Solar Home Program (NSHP)**

**Address**

Address 1\*:

Address 2:

City\*:

State\*:  
California

Zip Code\*:

Enter the mailing address to complete the Address section and select the Continue button.

### **Next Steps**

Your new NSHP account has been created. You can now select what you would like to do next.

- Create a New Project
- Go to the NSHP Main Menu
- Finish and come back to the NSHP Web Application Later

### **Sign Up for the New Solar Home Program (NSHP)**

**Next Steps**

Your new NSHP account is created. What would you like to do next?

Create a New Project now

Go to the NSHP Main Menu

Finish and come back to the NSHP Web Application Later

Please select your next step. You can begin creating an NSHP Project for one of your customers, Go to the NSHP Main Menu or complete NSHP Registration and stop.

If you are ready to create a new project, select the option “Create a New Project now.”

You will now add project information.

# Creating a Project

## Add Project Information

Project Description

Name\*:

Address 1:  Address 2:

City\*:  State\*:  Zip Code\*:

Electric Service Provider\*:

Utility Energy Efficiency Program?

Project Contacts

Builder/Homeowner\*: [New](#)

Primary Contact\*: [New](#)

Alternate Contact: [New](#)

Authorized Representative\*: [New](#)

Project Detail

Applicant Is\*:  The Homeowner  A Builder/Developer

Occupancy Type\*:  Single Family  MultiFamily

Residential units\*:  Residential Units with Solar\*:  Common Area Units with Solar\*:

Reservation Type\*:

- Large Development (6 Units or More)
- Custom Home
- Small Housing Development (5 Units or Less)
- Solar NOT as a Standard
- Common Area Systems
- Affordable Housing

Will your system be Virtual Net Metered (VNM)?

Yes  No

## Project Description

Project Description

Name\*:  
Energy Commission

Address 1: Address 2:

City\*:  
State\*:  
Zip Code\*:

Electric Service Provider\*:

Utility Energy Efficiency Program?

Enter project name, address information, city, state and zip code. After you enter your zip code, the name of the Electric Service Provider that services your area will appear in the drop down box labeled "Electric Service Provider."

A message is noted, Utility Energy Efficiency Program? If you check this box, you will be asked for the Residential New Construction Program Number. If you are participating in a program, please add the number to this box.

## Project Contacts

Project Contacts

Builder/Homeowner\*: [New](#) [Add Existing](#)

[Select]

Primary Contact\*: [New](#) [Add Existing](#)

[Select]

Alternate Contact: [New](#) [Add Existing](#)

[Select]

Authorized Representative\*: [New](#) [Add Existing](#)

[Select]

You will now select or create your contacts for the project.

**Builder/Homeowner:** Select or create the homeowner of the project or the builder of the project.

**Primary Contact:** Select or create the person who should be contacted if the program administrator has questions regarding this application.

**Alternate Contact:** Select or create the person who should be contacted by the program administrator if the primary contact is not available.

**Authorized Representative:** Select or create the authorized representative for the project.

### Creating a Project Contact

A homeowner, builder, representative, primary contact and alternate contact can also be referenced as an *Associate* with this web tool application.

## Associate Detail

[Add Login \(Optional\)](#)

**Associate Information**

Business Name:

First Name*: <input type="text"/>	Last Name*: <input type="text"/>
Title: <input type="text"/>	Phone: <input type="text"/>
Email*: <input type="text"/>	Fax: <input type="text"/>
Address 1*: <input type="text"/>	Address 2: <input type="text"/>
City*: <input type="text"/>	State*: <input type="text" value="California"/>
	Zip Code*: <input type="text"/>

Enter all applicable information and select the “Save & Return” button. Fields with asterisks are required. You cannot continue until these fields are complete.

## Project Detail

Project Detail

Applicant Is\*:  The Homeowner  A Builder/Developer

Occupancy Type\*:  Single Family  MultiFamily

Residential units\*:  Residential Units with Solar\*:  Common Area Units with Solar\*:

Reservation Type\*:

- Large Development (6 Units or More)
- Custom Home
- Small Housing Development (5 Units or Less)
- Solar NOT as a Standard
- Common Area Systems
- Affordable Housing

Will your system be Virtual Net Metered (VNM)?

Yes  No

Please provide the system generation allocation percentages:

Residential Dwelling Units:

Affordable Housing Residential Dwelling Units:

Common Areas:

**Applicant Is:** Select whether the Applicant is the Homeowner or Builder/Developer.

**Occupancy Type:** Single Family Home or Multi-Family Home.

**Residential Units:** Enter the total number of residential units within this project.

**Residential Units with Solar:** Enter the number of residential units within this project that will have solar installed.

**Common Area Units with Solar:** Enter the number of common area units with solar (if applicable). A common area is eligible for an incentive as long as the common area(s) primarily benefit the residential occupants.

Reservation Type

Select Large Development (6 units or more), Custom Home, Small Housing Development (5 units or less), Solar NOT as a Standard, Common Area Systems, or Affordable Housing.

**Large Developments:** Projects where the builder/developer has committed to installing solar on 50 percent or more of the dwelling units of a build-out phase of six or more residential units.

**Custom Home:** This is a home that is especially designed to meet the specifications of the person who commissioned it.

**Small Developments:** This is a small housing development with less than six homes built.

**Common Area Systems:** These are solar systems installed on common areas of new residential, mixed-use buildings or developments. The common area must provide a primary benefit for the residential occupants.

**Projects w/ Solar on Fewer Than 50% of Residential Units (Solar NOT as Standard):** The builder/developer offers solar energy systems as an option to residential home buyers. The NSHP will reserve funding for up to 50 percent of the residential dwelling units in this project.

**Affordable Housing:** Eligible projects include multifamily and single family developments where at least 20 percent of the project units are reserved for extremely low, very low, lower or moderate income households for a period of at least 10 years. The affordable housing projects must be undertaken pursuant to Sections 50052,5, 50053, or 50199.4 of the Health and Safety Code, or other affordable housing laws or regulations adopted by the California Department of Housing and Community Development.

**Project Detail Notes:** Project Detail Notes listed at the bottom of the Project Information page can be viewed and edited by anyone with access to the project.

After all applicable information has been added, select the Add Project button underneath Project Detail Notes.

Project Detail Notes

## Project Summary

Project Reservation			Site Payment		
 Information	 Review	 Complete	 Sites	 Review	 Payment

Project	
<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Actions
<input type="button" value="Submit"/> <input type="button" value="Cancel Submit"/> <input type="button" value="Re-Apply"/> <input type="button" value="Plan Check Ready"/> <input type="button" value="Submit to Plan Check"/> <input type="button" value="Approve Plan Check"/>
<input type="button" value="Plan Check More Information"/> <input type="button" value="Approve"/> <input type="button" value="Disapprove"/> <input type="button" value="More Information"/> <input type="button" value="Withdraw"/>
<input type="button" value="Complete Expiration"/>

**Before submitting your Project for approval, please review the following statuses. Complete any items where status is Incomplete.**

<b>Project Information</b>	 Complete
<b>Attachments</b>	 Incomplete <input type="button" value="Complete Attachments"/> 8 Project Document Attachment(s) Required.
<b>Sites</b>	 Incomplete <input type="button" value="Complete Sites"/> 1 Site(s) Required.

After you select the Add Project button, you are taken to the Project Summary page. Note the timeline noted above the Project box. This timeline will provide a snapshot of the current progress of your application.

The Project Summary provides status information pertaining to the project. The next step of the application process is to add documents (Attachments) for your project.

Select the Complete Attachments button.

# Project Attachments

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b>
<b>Applicant:</b>	<b>Expiration:</b>

[Incentive Levels](#)

**Submission Date:** [Project Notes](#)

Actions

<input type="button" value="Submit"/>	<input type="button" value="Cancel Submit"/>	<input type="button" value="Re-Apply"/>	<input type="button" value="Plan Check Ready"/>	<input type="button" value="Submit to Plan Check"/>	<input type="button" value="Approve Plan Check"/>
<input type="button" value="Plan Check More Information"/>	<input type="button" value="Approve"/>	<input type="button" value="Disapprove"/>	<input type="button" value="More Information"/>	<input type="button" value="Withdraw"/>	
<input type="button" value="Complete Expiration"/>					

[Expand All](#)   [Mail All](#)   [Download Reservation Application](#)

Guidebook Requirement		
1.	<a href="#">Building Permit / Subdivision Map*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
2.	<a href="#">Construction Plan-Set*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
3.	<a href="#">Equipment Purchase Agreement/Installation Contract*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
4.	<a href="#">Lease / PPA Agreement</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
5.	<a href="#">PV Calculator CF-1R-PV / NSHP PV-1 Form*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
6.	<a href="#">PV Calculator File (.emf)</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
7.	<a href="#">PV Calculator File (.her)*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
8.	<a href="#">Reservation Application Form (NSHP-1)*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
9.	<a href="#">System Size Justification</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
10.	<a href="#">Title 24 CF-1R File (.bld, .mp7, .mp8, or .ribd)*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
11.	<a href="#">Title 24 CF-1R Form*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
12.	<a href="#">Utility Energy Efficiency Program Reservation Approval Letter</a>	<a href="#">Attach</a> <a href="#">Mail In</a>

**Asterisks (\*) next to any Document indicates that the Document is required**

Select the required Guidebook Requirement form/file by selecting the [Attach](#) hyperlink or the [Mail In](#) hyperlink. You can also select the [Mail All](#) hyperlink. If you download a form/file, please use the appropriate file type that is noted next to the form/file name. All required forms that do not specify a file type must be submitted as a .pdf. If the file cannot be read, then the document will be considered incomplete and will need to be resubmitted.

For faster processing time, it is highly recommended to submit your project in the web tool. All projects in the web tool have priority over mail-in projects. Please note: Attachment have a size restriction. The document cannot be larger than 15 MB. You can break up the attachment into smaller sizes in order to submit via the web tool, or submit the entire attachment by mail.

# Project Summary

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <u>Incomplete</u>
<b>Applicant:</b>	<b>Expiration:</b>
<u>Incentive Levels</u>	
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Actions

<a href="#">Submit</a>	<a href="#">Cancel Submit</a>	<a href="#">Re-Apply</a>	<a href="#">Plan Check Ready</a>	<a href="#">Submit to Plan Check</a>	<a href="#">Approve Plan Check</a>
<a href="#">Plan Check More Information</a>	<a href="#">Approve</a>	<a href="#">Disapprove</a>	<a href="#">More Information</a>	<a href="#">Withdraw</a>	
<a href="#">Complete Expiration</a>					

**Before submitting your Project for approval, please review the following statuses. Complete any items where status is Incomplete.**

<b>Project Information</b>	✔ <a href="#">Complete</a>
<b>Attachments</b>	✔ <a href="#">Complete</a>
<b>Sites</b>	<u>Incomplete</u> <a href="#">Complete Sites</a> <span style="color: red;">1 Site(s) Required.</span>

After the Attachments have been selected, click on the Incomplete link in the Project box and you will be returned to the Project Summary screen. You will now complete the sites associated with the Project. If there is only one site, (custom home) you will still need to complete the Site information.

Select the Complete Sites button.

## Creating a Site

After the Complete Sites button is selected, you will be taken to the Site Search page. To create a new site, select the [New Site](#) link.

### Site Search

Project Reservation			Site Payment		
 <b>Information</b>	 <b>Review</b>	 <b>Complete</b>	 <b>Sites</b>	 <b>Review</b>	 <b>Payment</b>

Project

**ID:** **Name:**

**Type:** **Status:**  [Incomplete](#)

**Applicant:** **Expiration:**

[Incentive Levels](#)

**Submission Date:** [Project Notes](#)

Search Criteria

Administrator:  Status:  Deleted:

 [New Site](#)  [Upload Sites](#) 0 of 1 Sites Entered Records Found:0

Page of << First < Prev Records - Next > Last >> Records Per Page:

After selecting the link you will be taken to the Site Detail – Add screen.

## Site Detail - Add

Project Reservation			Site Payment		
 <b>Information</b>	 <b>Review</b>	 <b>Complete</b>	 <b>Sites</b>	 <b>Review</b>	 <b>Payment</b>

Project

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b>  <u>Incomplete</u>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site Description

Site Name\*:

Address 1\*:

Address 2:

City\*:

State\*:

Zip Code\*:

Common Area?

Electric Service Provider\*:

Site Contacts

Builder/Homeowner\*: [New](#) [Add](#) [Existing](#)

Rebate Payee\*: [New](#)

Building Energy Efficiency Standards

Please select the edition of the Building Energy Efficiency Standards that that the building was permitted under:\*

2005

2008

2013

Rebate Information

Time Dependent Valuation (TDV)\*:

Rebate Amount\*:

\$

Title 24 Margin\*:

%

Permits

Building Permit Issue Date:

Certificate of Occupancy Date:

Solar Permit:

Issue Date:   Cost: \$

Electric Grid Interconnection Date:

System

System Acquired By:  Purchase  Lease  Power Purchase Agreement (PPA)

System Owned By\*:  Tax-Exempt Entity  Non-Tax-Exempt Entity

Equipment Cost: \$

Installation Cost: \$

Balance of System Cost: \$

Cost:

Total Cost: \$0.00

HERS

Energy Efficiency Provider (EE):

[Select] 

Raters Cost (EE):

\$

Photovoltaic System Provider (PV):

[Select] 

Raters Cost (PV):

\$

Total HERS Rater Cost:

\$0.00

## Site Description

Site Description		
Site Name*: <input type="text"/>		
Address 1*: <input type="text"/>		Address 2: <input type="text"/>
City*: <input type="text"/>	State*: <input type="text"/>	Zip Code*: <input type="text"/>
Common Area? <input type="checkbox"/>		
Electric Service Provider*: <input type="text"/>		

The address, city, state, and zip code will automatically carry over from the Project Address. If the address is not correct, make appropriate changes.

If the solar PV system is being applied to a common area, check the "Common Area?" box.

Site Contacts
Builder/Homeowner*: <a href="#">New</a> <input type="text"/>
Rebate Payee*: <a href="#">New</a> <input type="text"/>

The Builder/Homeowner name will be added automatically. Change if necessary. In the Rebate Payee contact box, select a name from the drop-down menu or add a new contact person.

Building Energy Efficiency Standards		
Please select the edition of the Building Energy Efficiency Standards that that the building was permitted under:*		
<input type="radio"/> 2005	<input type="radio"/> 2008	<input type="radio"/> 2013

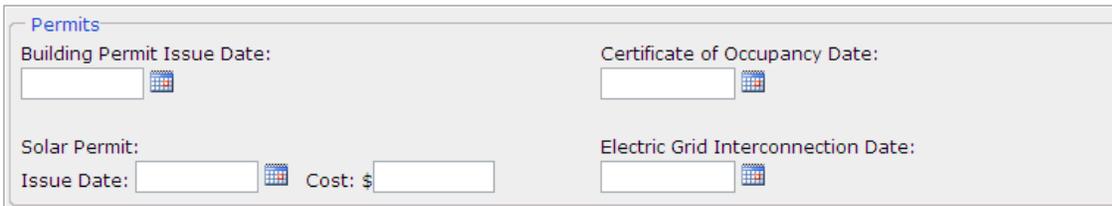
Rebate Information		
Time Dependent Valuation (TDV)*: <input type="text"/>	Rebate Amount*: \$ <input type="text"/>	Title 24 Margin*: <input type="text"/> %

**Time Dependent Valuation (TDV):** This information is derived from the CECPV Calculator<sup>1</sup>.

**Rebate Amount:** This information is derived from the CECPV Calculator.

**Title 24 Margin:** Provided on Certificate of Compliance form (CF-1R).

The Permits, Equipment and HERS sections will be completed after the installation of the solar system, so they do not have asterisks at this time.



The Permit information does not need to be completed at the time of reservation application, but will need to be completed before the site receives payment.

**Building Permit Issue Date:** This is the date the building permit was issued from the local jurisdiction.

**Certificate of Occupancy Date:** This is the date the building permit is signed off or when a document is issued by a local government agency certifying a building's compliance with applicable building codes and other laws, and indicating it to be in a condition suitable for occupancy.

**Solar Permit:**

**Issue Date:** This is the date that a local jurisdiction issued a solar permit.

**Cost:** This is the costs the local jurisdiction charged for the solar permit.

**Electric Grid Interconnection Date:** This is the date the utility approves the connection of the solar system to the grid. This information is noted on the Interconnection Letter received from the utility.

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<sup>1</sup> The CECPV Calculator incorporates detailed inverter performance modeling and uses weather data from the 16 climate zones in California (as used by the Title 24 compliance calculations). The MS Excel interface to the calculation engine is provided by the Energy Commission for download and allows the user to select PV modules and inverters from a library of eligible equipment. Please check this website periodically for updates as new equipment may be added to the NSHP eligibility lists: <http://www.gosolarcalifornia.ca.gov/equipment/index.php>

System	
System Acquired By:	<input type="radio"/> Purchase <input type="radio"/> Lease <input type="radio"/> Power Purchase Agreement (PPA)
System Owned By*:	<input type="radio"/> Tax-Exempt Entity <input type="radio"/> Non-Tax-Exempt Entity
Equipment Cost:	\$ <input type="text"/>
Installation Cost:	\$ <input type="text"/>
Balance of System Cost:	\$ <input type="text"/>
Total Cost:	\$0.00

**System Acquired by:** Select whether the equipment was purchased, leased, or applicant entered into a Power Purchase Agreement (PPA).

**System Owned By:** Select whether the entity that owns the system is tax-exempt or non-tax-exempt. This is a required field and must be checked before the site can be completed.

**Equipment Cost:** Enter the cost of equipment which includes the modules and inverters.

**Installation Cost:** Enter the cost of installation of the solar PV system.

**Balance of System Cost:** Enter the balance of system costs which include any additional costs associated with the installation. The web tool suggests some examples of additional costs as you hover your cursor over the field.

**Total Cost:** These costs will be calculated automatically.

HERS	
Energy Efficiency Provider (EE):	[Select] <input type="text"/>
Photovoltaic System Provider (PV):	[Select] <input type="text"/>
Raters Cost (EE):	\$ <input type="text"/>
Raters Cost (PV):	\$ <input type="text"/>
Total HERS Rater Cost:	\$0.00

**Energy Efficiency Provider (EE):** From the drop down menu select the HERS provider (CHEERS or CalCERTS).

**Photovoltaic System Provider (PV):** From the drop down menu select the HERS provider (CHEERS or CalCERTS).

**Raters Cost (EE):** Enter the cost the HERS rater charged for the energy efficiency field verification.

**Raters Cost (PV):** Enter the cost the HERS rater charged for the photovoltaic system field verification.

**Total HERS Rater Cost:** This will be automatically calculated.

Enter all applicable information and select the Save and Return button.

After you select the Save and Return button you will be taken back to the Site Summary screen.

Note: The status for Equipment is Incomplete. Select the Complete Equipment button.

## Site Summary

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project:

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <a href="#">Incomplete</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site:

<b>ID:</b>	<b>Address/Name:</b>	<b>Status:</b> <a href="#">Incomplete</a>
------------	----------------------	---

Actions:

**Before submitting your Site for approval, please review the following statuses. Complete any items where status is Incomplete.**

<b>Site Information</b>	<a href="#">Complete</a>
<b>Attachments</b>	<a href="#">Complete</a>
<b>Equipment</b>	<a href="#">Incomplete</a> <input type="button" value="Complete Equipment"/> <b>Modules Required.</b> <b>Inverters Required.</b>

To enter an inverter or module, select the [New Inverter](#) hyperlink or the [New Module](#) hyperlink.

## Equipment Summary

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project	
<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <a href="#">Incomplete</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site	
<b>ID:</b>	<b>Address/Name:</b>
	<b>Status:</b> <a href="#">Incomplete</a>

Actions			
<input type="button" value="Submit"/>	<input type="button" value="Cancel Submit"/>	<input type="button" value="Withdraw"/>	<input type="button" value="Return Unused Capacity"/>

Search Criteria	
Deleted:	
<input type="button" value="Not Deleted"/>	<input type="button" value="Filter"/>

<a href="#">New Inverter</a>	<a href="#">New Module</a>	Records Found: 0
Page 0 of 0		Records Per Page: <input type="button" value="10"/>
<< First < Prev Records 1 - 10 Next > Last >>		

## Equipment - Inverters

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project	
<b>ID:</b> NP00050L	<b>Name:</b> 5
<b>Type:</b> Custom Home	<b>Status:</b> Incomplete
<b>Applicant:</b> *****	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	
<b>Submission Date:</b> N/A	<a href="#">Project Notes</a>

Site	
<b>ID:</b> NS001VMC	<b>Address/Name:</b> dfas
	<b>Status:</b> Incomplete

**Step 1 - Select items.**

Search Criteria	
Manufacturer:	Model:
<input type="text" value="[Select]"/>	<input type="text"/>
	<input type="button" value="Filter"/>

**Inverters** Records Found: 1598

Page 1 of 160 << First < Prev Records 1 - 10 Next > Last >>

Vendor	Model	Qty * <input type="checkbox"/>
--------	-------	--------------------------------

If you know the manufacturer of the inverter, use the drop-down menu under Search Criteria and scroll down to the manufacturer's name which will be highlighted. Select the Filter button and all of the inverters for this manufacturer will be displayed. Add the number of inverters in the box to the right of the selected inverter. Select the Next Step button.



Complete the same steps from the Inverter section to add equipment in the Module section.

Equipment has been added and the Project Status has changed to Ready to Submit. The Site Status is Complete. Select the Ready to Submit hyperlink in the Project Status box.

## Site Summary

Project Reservation			Site Payment		
 Information	 Review	 Complete	 Sites	 Review	 Payment

Project	
<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b>  <u>Ready to Submit</u>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site		
<b>ID:</b>	<b>Address/Name:</b>	<b>Status:</b>  <u>Complete</u>

Actions			
<input type="button" value="Submit"/>	<input type="button" value="Cancel Submit"/>	<input type="button" value="Withdraw"/>	<input type="button" value="Return Unused Capacity"/>

Before submitting your Site for approval, please review the following statuses. Complete any items where status is Incomplete.

<b>Site Information</b>	 <u>Complete</u>
<b>Attachments</b>	 <u>Complete</u>
<b>Equipment</b>	 <u>Complete</u>

# Submit a Reservation Application

The Project Submit button has now been activated. If you are ready to submit your project, select the button.

## Project Summary

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project	
<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <a href="#">Ready to Submit</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Actions					
<b>Submit</b>	Cancel Submit	Re-Apply	Plan Check Ready	Submit to Plan Check	Approve Plan Check
Plan Check More Information	Approve	Disapprove	More Information	Withdraw	
Complete Expiration					

Before submitting your Project for approval, please review the following statuses. Complete any items where status is Incomplete.

<b>Project Information</b>	<a href="#">Complete</a>
<b>Attachments</b>	<a href="#">Complete</a>
<b>Sites</b>	<a href="#">Complete</a>

After you select the Submit button a pop-up message will appear.

<b>Submit for Approval?</b>	
Ok	Cancel

If you are ready to submit, select the Ok button.

The Project Status has now changed to Submitted. If you want to cancel the submission of the application, select the Cancel Submit button. You can only cancel the submission before the project has been received by the Energy Commission.

## Project Summary

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project	
ID:	Name:
Type:	Status:  Submitted
Applicant:	

Actions	
<input type="button" value="Submit"/>	<input type="button" value="Cancel Submit"/>

**Before submitting your Project for approval, please review the following statuses. Complete any items where status is Incomplete.**

Project Information	Complete
Attachments	Complete
Sites	Complete

The Energy Commission (CEC) will review your application and the documents that were attached to the application. **If additional information is needed, the CEC will notify you.**

While your application is being reviewed the statuses will change. Possible status changes are “Received”, “Plan Check Ready”, “Submitted to Plan Check”, “More Plan Check Information”, “Plan Check Approved”, and “Approved by Utility”.

When the project has been approved by the Energy Commission, the project status will change to “Approved by CEC”. The Project Summary will now be updated to include the following message: “See the Site Summary for any non-paid Site for additional actions.”

# Submit a Payment Claim

## Project Summary

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project	
<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <a href="#">Approved By CEC</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Actions					
<a href="#">Submit</a>	<a href="#">Cancel Submit</a>	<a href="#">Re-Apply</a>	<a href="#">Plan Check Ready</a>	<a href="#">Submit to Plan Check</a>	<a href="#">Approve Plan Check</a>
<a href="#">Plan Check More Information</a>	<a href="#">Approve</a>	<a href="#">Disapprove</a>	<a href="#">More Information</a>	<a href="#">Withdraw</a>	
<a href="#">Complete Expiration</a>					

Before submitting your Project for approval, please review the following statuses. Complete any items where status is Incomplete.

<b>Project Information</b>	<a href="#">Complete</a>
<b>Attachments</b>	<a href="#">Complete</a>
<b>Sites</b>	<a href="#">Complete</a> <a href="#">Complete Sites</a> <i>See the Site Summary for any non-paid Site for additional actions.</i>

Select the Complete Sites button to review what additional information is required. This information is submitted after the solar installation is complete and certified.

## Site Summary

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <a href="#">Approved By CEC</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site

<b>ID:</b>	<b>Address/Name:</b>	<b>Status:</b> <a href="#">Incomplete</a>
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Actions

**Before submitting your Site for approval, please review the following statuses. Complete any items where status is Incomplete.**

<b>Site Information</b>	<a href="#">Incomplete</a> <input type="button" value="Complete Information"/> Additional Site Information is Required.
<b>Attachments</b>	<a href="#">Incomplete</a> <input type="button" value="Complete Attachments"/> 7 Site Document Attachment(s) are Required.
<b>Equipment</b>	<a href="#">Complete</a>

In Site Information section, select the Complete Information button.

Permits	
Building Permit Issue Date*: <input type="text"/>	Certificate of Occupancy Date*: <input type="text"/>
Solar Permit*: Issue Date: <input type="text"/> Cost: \$ <input type="text"/>	Electric Grid Interconnection Date*: <input type="text"/>

System	
System Acquired By*: <input type="radio"/> Purchase <input type="radio"/> Lease <input type="radio"/> Power Purchase Agreement (PPA)	
System Owned By*: <input type="radio"/> Tax-Exempt Entity <input checked="" type="radio"/> Non-Tax-Exempt Entity	
Equipment Cost*: \$	<input type="text"/>
Installation Cost*: \$	<input type="text"/>
Balance of System Cost:	\$ <input type="text"/>
Total Cost:	\$0.00

HERS		
Energy Efficiency Provider (EE)*: <input type="text"/> [Select] ▼	Raters Cost (EE)*:	\$ <input type="text"/>
Photovoltaic System Provider (PV)*: <input type="text"/> [Select] ▼	Raters Cost (PV)*:	\$ <input type="text"/>
Total HERS Rater Cost:		\$0.00

The following sections need to be completed:

- Permits
- System
- HERS

For definitions of each field go to Section 3: Creating a Site

After all of the required fields are completed, select the Save and Return button.

## Site Summary

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <a href="#">Approved By CEC</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site

<b>ID:</b>	<b>Address/Name:</b>	<b>Status:</b> <a href="#">Incomplete</a>
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Actions

Before submitting your Site for approval, please review the following statuses. Complete any items where status is Incomplete.

<b>Site Information</b>	<a href="#">Complete</a>
<b>Attachments</b>	<a href="#">Incomplete</a> <input type="button" value="Complete Attachments"/> <span style="color: red;">7 Site Document Attachment(s) are Required.</span>
<b>Equipment</b>	<a href="#">Complete</a>

In the Attachments section, select the Complete Attachments button.

Either attach the documents in the web tool or mail in the documents that are required to the Energy Commission.

Please note: Attachment have a size restriction. The document cannot be larger than 15 MB. You can break up the attachment into smaller sizes in order to submit via the web tool, or submit the entire attachment by mail.

## Site Attachments

Project Reservation			Site Payment		
<b>Information</b>	<b>Review</b>	<b>Complete</b>	<b>Sites</b>	<b>Review</b>	<b>Payment</b>

Project

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <span style="color: green;">✔</span> <a href="#">Approved By CEC</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site

<b>ID:</b>	<b>Address/Name:</b>	<b>Status:</b> <span style="color: orange;">⚠</span> <a href="#">Incomplete</a>
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Actions

[Expand All](#)
[Mail All](#)
[Download Payment Claim Form](#)
[Download Warranty Form](#)

Guidebook Requirement		
1.	<a href="#">Final Building Permit Signoff</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
2.	<a href="#">Final Invoice Payment Proof / Final System Cost Documentation*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
3.	<a href="#">HERS EE Verification Forms CF-4R / CF-3R and NSHP EE-3*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
4.	<a href="#">HERS PV Verification Form CF-4R-PV / NSHP PV-3*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
5.	<a href="#">Interconnect Authorization Letter*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
6.	<a href="#">Lease / PPA Agreement</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
7.	<a href="#">Maintenance &amp; Monitoring Plan</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
8.	<a href="#">Miscellaneous Forms (Including Revised CF-1R-PV's)</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
9.	<a href="#">NSHP-3 Warranty Form*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
10.	<a href="#">Payee Data Form*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
11.	<a href="#">Signed NSHP-2 Form (Must be mailed to Program Administrator.)*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
12.	<a href="#">Utility Energy Efficiency Program Payment Approval Letter</a>	<a href="#">Attach</a> <a href="#">Mail In</a>

Asterisks (\*) next to any Document indicates that the Document is required

In the Actions section select the Submit button.

## Site Attachments

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <span style="color: green;">✔</span> <a href="#">Approved By CEC</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site

<b>ID:</b>	<b>Address/Name:</b>	<b>Status:</b> <span style="color: green;">✔</span> <a href="#">Ready to Submit</a>
------------	----------------------	---

Actions

<b>Submit</b>	Cancel Submit	Approve	Disapprove	More Information	Withdraw
Return Unused Capacity					

Expand All   Mail All   [Download Payment Claim Form](#)   [Download Warranty Form](#)

Guidebook Requirement		
1.	<a href="#">Final Building Permit Signoff</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
2.	<a href="#">Final Invoice Payment Proof / Final System Cost Documentation*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
3.	<a href="#">HERS EE Verification Forms CF-4R / CF-3R and NSHP EE-3*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
4.	<a href="#">HERS PV Verification Form CF-4R-PV / NSHP PV-3*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
5.	<a href="#">Interconnect Authorization Letter*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
6.	<a href="#">Lease / PPA Agreement</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
7.	<a href="#">Maintenance &amp; Monitoring Plan</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
8.	<a href="#">Miscellaneous Forms (Including Revised CF-1R-PV's)</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
9.	<a href="#">NSHP-3 Warranty Form*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
10.	<a href="#">Payee Data Form*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
11.	<a href="#">Signed NSHP-2 Form (Must be mailed to Program Administrator.)*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
12.	<a href="#">Utility Energy Efficiency Program Payment Approval Letter</a>	<a href="#">Attach</a> <a href="#">Mail In</a>

Asterisks (\*) next to any Document indicates that the Document is required

The application has been submitted and will be reviewed by the CEC. The Project status will now reflect Approved by CEC and the Site status will change to Submitted.

## Site Attachments

Project Reservation			Site Payment		
 <b>Information</b>	 <b>Review</b>	 <b>Complete</b>	 <b>Sites</b>	 <b>Review</b>	 <b>Payment</b>

Project	
<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b>  <a href="#">Approved By CEC</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>

Site		
<b>ID:</b>	<b>Address/Name:</b>	<b>Status:</b>  <a href="#">Submitted</a>

Actions	
<input type="button" value="Submit"/>	<input type="button" value="Cancel Submit"/>

[Expand All](#) [Mail All](#) [Download Payment Claim Form](#) [Download Warranty Form](#)

Guidebook Requirement	
1.	 <a href="#">Final Building Permit Signoff</a>
2.	 <a href="#">Final Invoice Payment Proof / Final System Cost Documentation*</a>
3.	 <a href="#">HERS EE Verification Forms CF-4R / CF-3R and NSHP EE-3*</a>
4.	 <a href="#">HERS PV Verification Form CF-4R-PV / NSHP PV-3*</a>
5.	 <a href="#">Interconnect Authorization Letter*</a>
6.	 <a href="#">Lease / PPA Agreement</a>
7.	 <a href="#">Maintenance &amp; Monitoring Plan</a>
8.	 <a href="#">Miscellaneous Forms (Including Revised CF-1R-PV's)</a>
9.	 <a href="#">NSHP-3 Warranty Form*</a>
10.	 <a href="#">Payee Data Form*</a>
11.	 <a href="#">Signed NSHP-2 Form (Must be mailed to Program Administrator.)*</a>
12.	 <a href="#">Utility Energy Efficiency Program Payment Approval Letter</a>

**Asterisks (\*) next to any Document indicates that the Document is required**

During the next review process, the CEC will review the payment claim. If it is complete and accurate, the Site status will change to Approved by CEC.

## Site Attachments

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <a href="#">Approved By CEC</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site

<b>ID:</b>	<b>Address/Name:</b>	<b>Status:</b> <a href="#">Approved By CEC</a> :
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Actions

[Expand All](#)
[Mail All](#)
[Download Payment Claim Form](#)
[Download Warranty Form](#)

Guidebook Requirement	
1.	<a href="#">Final Building Permit Signoff</a>
2.	<a href="#">Final Invoice Payment Proof / Final System Cost Documentation*</a>
3.	<a href="#">HERS EE Verification Forms CF-4R / CF-3R and NSHP EE-3*</a>
4.	<a href="#">HERS PV Verification Form CF-4R-PV / NSHP PV-3*</a>
5.	<a href="#">Interconnect Authorization Letter*</a>
6.	<a href="#">Lease / PPA Agreement</a>
7.	<a href="#">Maintenance &amp; Monitoring Plan</a>
8.	<a href="#">Miscellaneous Forms (Including Revised CF-1R-PV's)</a>
9.	<a href="#">NSHP-3 Warranty Form*</a>
10.	<a href="#">Payee Data Form*</a>
11.	<a href="#">Signed NSHP-2 Form (Must be mailed to Program Administrator.)*</a>
12.	<a href="#">Utility Energy Efficiency Program Payment Approval Letter</a>

**Asterisks (\*) next to any Document indicates that the Document is required**

After all of the approvals have been completed, the rebate incentive will be scheduled for payment. After this has occurred, the Project and Site status will change to Finished.

## Project Summary

Project Reservation			Site Payment		
 Information	 Review	 Complete	 Sites	 Review	 Payment

Project	
<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b>  <a href="#">Finished</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Actions		
<input type="button" value="Submit"/>	<input type="button" value="Cancel Submit"/>	<input type="button" value="Re-Apply"/>

Before submitting your Project for approval, please review the following statuses. Complete any items where status is Incomplete.

<b>Project Information</b>	 <a href="#">Complete</a>
<b>Attachments</b>	 <a href="#">Complete</a>
<b>Sites</b>	 <a href="#">Complete</a>

## Partial Payment Option

If your project is part of a Utility New Construction Energy Efficiency Program (e.g. CAHP, or California Advanced Homes Program), you have the option of requesting partial payments for your project.

To have this option become available to you, start a project as described in this document, but make sure the “Utility Energy Efficiency Program?” box is checked. You will also need to provide your program number. If you do not know this, contact your utility new construction program administrator.

Project Description

Name\*:

Address 1:  Address 2:

City\*:  
[Select]

State\*:  
California

Zip Code\*:  
[Select]

Electric Service Provider\*:

Utility Energy Efficiency Program?

Residential New Construction Program Number:

Complete everything in the web tool the same as normal, with the exception of uploading EE documents (HERS EE Verification Forms CF-4R/CF-3R and NSHP EE-3). If the EE documents are uploaded or “mailed in,” the web tool will think you are trying to submit a full payment claim and the “Request Partial Payment” button will not become available. Upload/mail in all other documents with asterisks next to them as you would normally do.

## Site Attachments

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project:

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <a href="#">Approved By CEC</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site:

<b>ID:</b>	<b>Address/Name:</b>	<b>Status:</b> <a href="#">Incomplete</a>
------------	----------------------	---

Actions

<input type="button" value="Submit"/>	<input type="button" value="Cancel Submit"/>	<input type="button" value="Approve"/>	<input type="button" value="Disapprove"/>	<input type="button" value="More Information"/>	<input type="button" value="Withdraw"/>
<input type="button" value="Return Unused Capacity"/>	<input type="button" value="Request Partial Payment"/>				

[Expand All](#)   [Mail All](#)   [Download Payment Claim Form](#)   [Download Warranty Form](#)

Guidebook Requirement		
1.	<a href="#">Final Building Permit Signoff</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
2.	<del><a href="#">Final Invoice Payment Proof / Final System Cost Documentation*</a></del>	<del><a href="#">Attach</a> <a href="#">Mail In</a></del>
3.	<a href="#">HERS EE Verification Forms CF-4R / CF-3R and NSHP EE-3*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
4.	<a href="#">HERS PV Verification Form CF-4R-PV / NSHP PV-3</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
5.	<a href="#">Interconnect Authorization Letter*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
6.	<a href="#">Lease / PPA Agreement</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
7.	<a href="#">Maintenance &amp; Monitoring Plan</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
8.	<a href="#">Miscellaneous Forms (Including Revised CF-1R-PV's)</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
9.	<a href="#">NSHP-3 Warranty Form*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
10.	<a href="#">Payee Data Form*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
11.	<a href="#">Signed NSHP-2 Form (Must be mailed to Program Administrator.)*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
12.	<a href="#">Utility Energy Efficiency Program Payment Approval Letter</a>	<a href="#">Attach</a> <a href="#">Mail In</a>

**Asterisks (\*) next to any Document indicates that the Document is required**

**DO NOT upload/mail in HERS EE Verification forms**

When you have these forms attached/mailed in, the “Request Partial Payment” button will become available to you.

## Site Attachments

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> Approved By CEC
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>
<b>Submission Date:</b>	<a href="#">Project Notes</a>

Site

<b>ID:</b>	<b>Address/Name:</b>	<b>Status:</b> Ready to Submit
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Actions

<input type="button" value="Submit"/>	<input type="button" value="Cancel Submit"/>	<input type="button" value="Approve"/>	<input type="button" value="Disapprove"/>	<input type="button" value="More Information"/>	<input type="button" value="Withdraw"/>
<input type="button" value="Return Unused Capacity"/>	<input type="button" value="Request Partial Payment"/>				

[Expand All](#)   [Mail All](#)   [Download Payment Claim Form](#)   [Download Warranty Form](#)

Guidebook Requirement		
1.	<a href="#">Final Building Permit Signoff</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
2.	<a href="#">Final Invoice Payment Proof / Final System Cost Documentation*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
3.	<a href="#">HERS EE Verification Forms CF-4R / CF-3R and NSHP EE-3*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
4.	<a href="#">HERS PV Verification Form CF-4R-PV / NSHP PV-3*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
5.	<a href="#">Interconnect Authorization Letter*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
6.	<a href="#">Lease / PPA Agreement</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
7.	<a href="#">Maintenance &amp; Monitoring Plan</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
8.	<a href="#">Miscellaneous Forms (Including Revised CF-1R-PV's)</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
9.	<a href="#">NSHP-3 Warranty Form*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
10.	<a href="#">Payee Data Form*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
11.	<a href="#">Signed NSHP-2 Form (Must be mailed to Program Administrator.)*</a>	<a href="#">Attach</a> <a href="#">Mail In</a>
12.	<a href="#">Utility Energy Efficiency Program Payment Approval Letter</a>	<a href="#">Attach</a> <a href="#">Mail In</a>

**Asterisks (\*) next to any Document indicates that the Document is required**

Once the partial payment has been requested, a message will be shown next to the site's status.

## Site Search

Project Reservation			Site Payment		
Information	Review	Complete	Sites	Review	Payment

Project

<b>ID:</b>	<b>Name:</b>
<b>Type:</b>	<b>Status:</b> <span style="color: green;">✔</span> <a href="#">Approved By CEC</a>
<b>Applicant:</b>	<b>Expiration:</b>
<a href="#">Incentive Levels</a>	<b>Rebate Amount:</b>

Search Criteria

Administrator:	Site Name, Address or ID:	Status:	Deleted:	<input type="button" value="Filter"/>
[All] ▼	<input type="text"/>	[Select] ▼	Not Deleted ▼	

[New Site](#)
[Upload Sites](#)
1 of 1 Sites Entered    Records Found: 1

Page 1 of 1    << First < Prev Records 1 - 10 Next > Last >>    Records Per Page: 10 ▼

	Address or Name	Status	
1.		<span style="color: blue;">ⓘ</span> Received <span style="color: red;">1st Partial Payment</span>	<a href="#">Details</a>