BUILD
Building Initiative for Low-Emissions Development Program

BUILD Incentive Application System (BUILD Online) Instructions

Disclaimer: BUILD is administered by the California Energy Commission in collaboration with the California Public Utilities Commission. It is authorized by Senate Bill 1477 (2018, Stern) and funded by the four California gas corporations apportioned according to each gas corporation's percentage share of allocated Cap-and-Trade Program allowances. Reservations are approved on a first come, first served basis, and regional funding availability is based on the utilities' contribution to the program.

INTRODUCTION

The California Energy Commission (CEC) administers the Building Initiative for Low-Emissions Development (BUILD) Program, a residential building decarbonization program providing incentives and technical assistance to support the adoption of advanced building design and near-zero-emission technologies in new, all-electric, low-income homes. The BUILD Incentive Application System (BUILD Online) accepts incentive reservation applications through the CEC's secure online application submission system.

These BUILD Online instructions provide information on:

- Registering for a BUILD account,
- Completing and submitting an initial incentive application for Step 1: Design or Step 2: Construction reservation,
- Transitioning an application through the three steps of the program (including Step 3: Completion), and if applicable,
- Making modifications to a submitted application.

The instructions are a helpful tool when preparing for and completing a BUILD incentive application. For complete details on program eligibility, incentives, required downloadable documentation requirements, and the terms and conditions of program participation, please consult the BUILD webpage.

All potential applicants are encouraged to request technical assistance for project design and for incentive application submittal support. To request technical assistance please complete a technical assistance application or contact the BUILD Technical Assistance Provider (TAP), the Association for Energy Affordability, at BUILD@aeacleanenergy.org. For general program questions or other issues, please contact BUILD staff at BUILD@energy.ca.gov.

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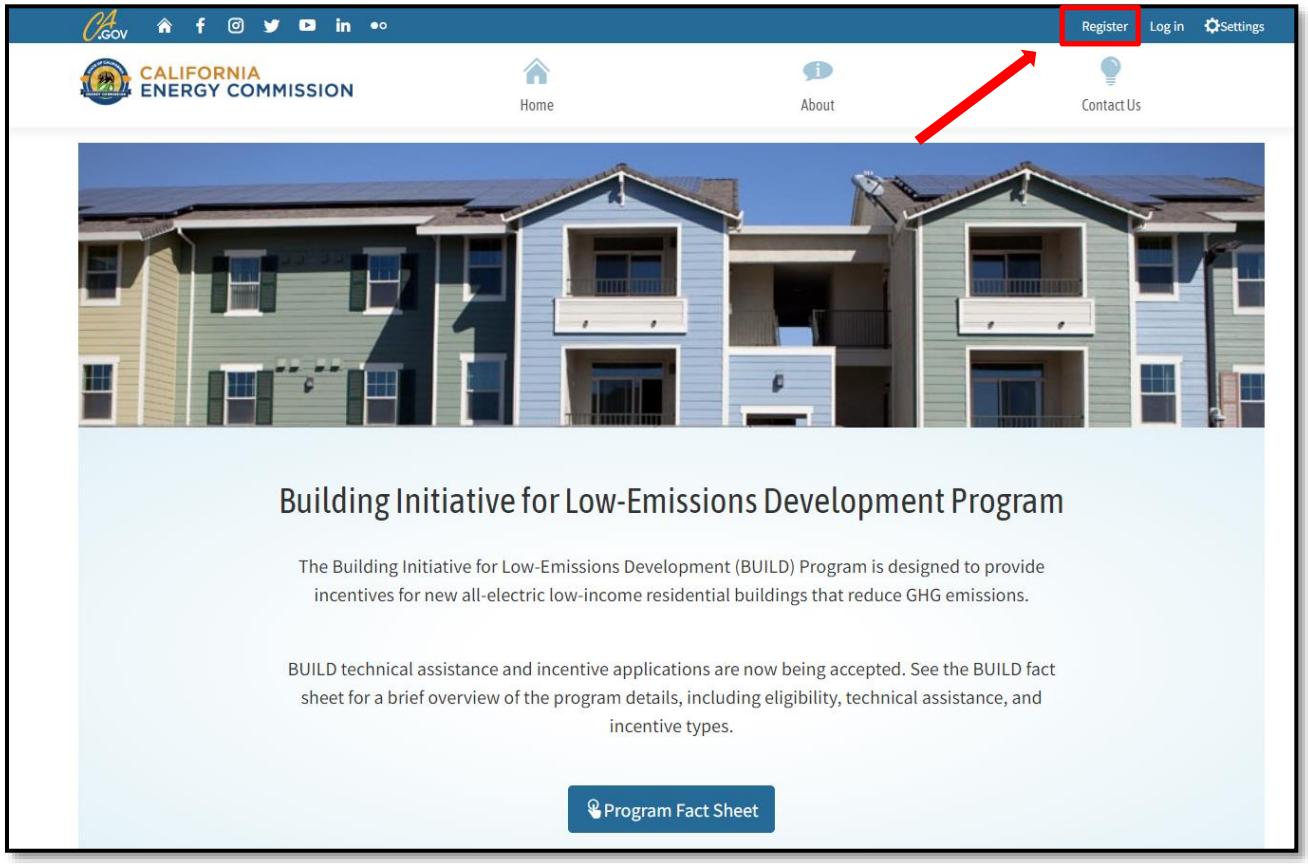
1. BUILD Applicant Online Registration

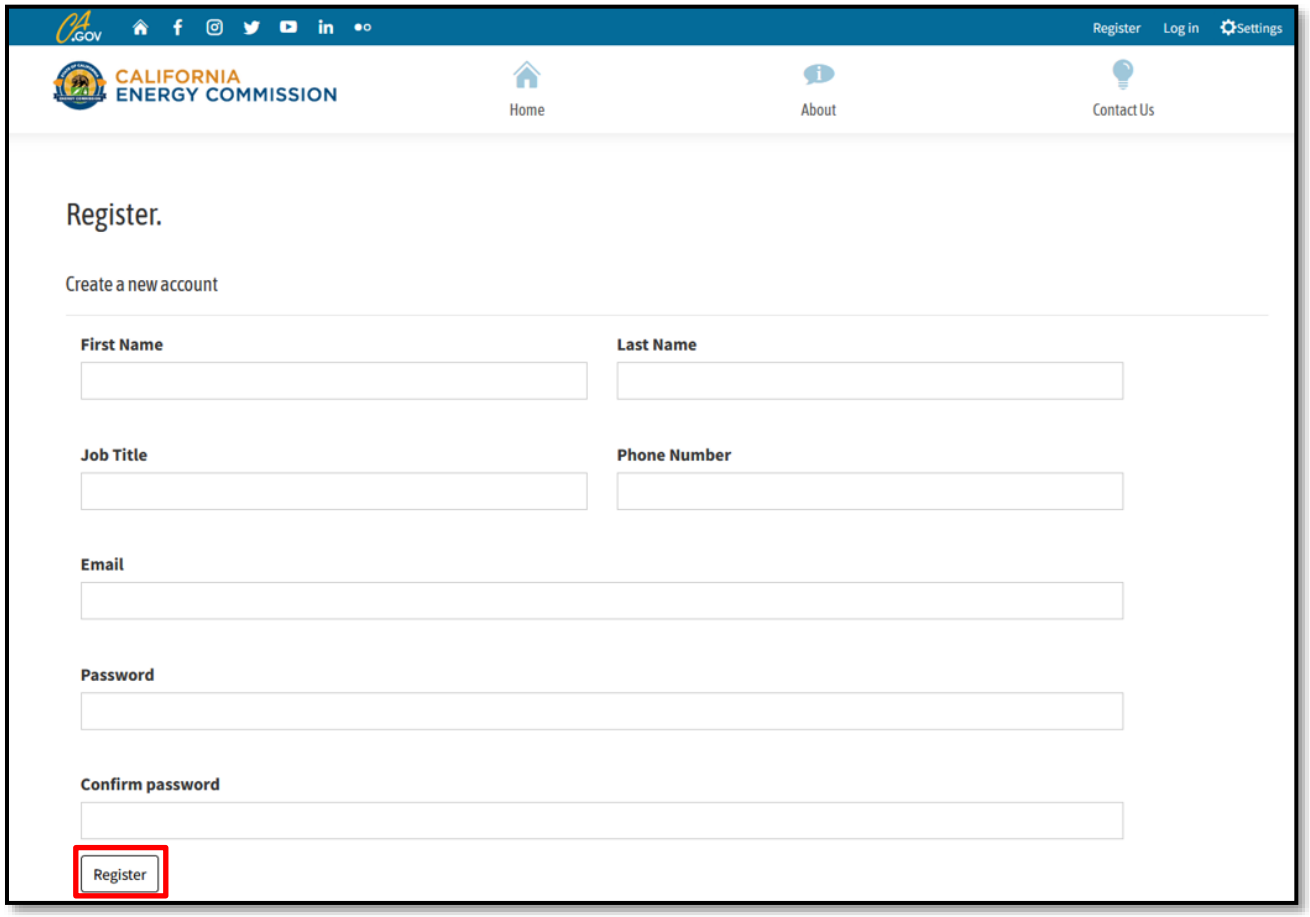
Applying for a BUILD incentive starts with registering online for a BUILD account. This section provides online registration and login instructions for accessing the BUILD Online form.

1.1 Account Registration

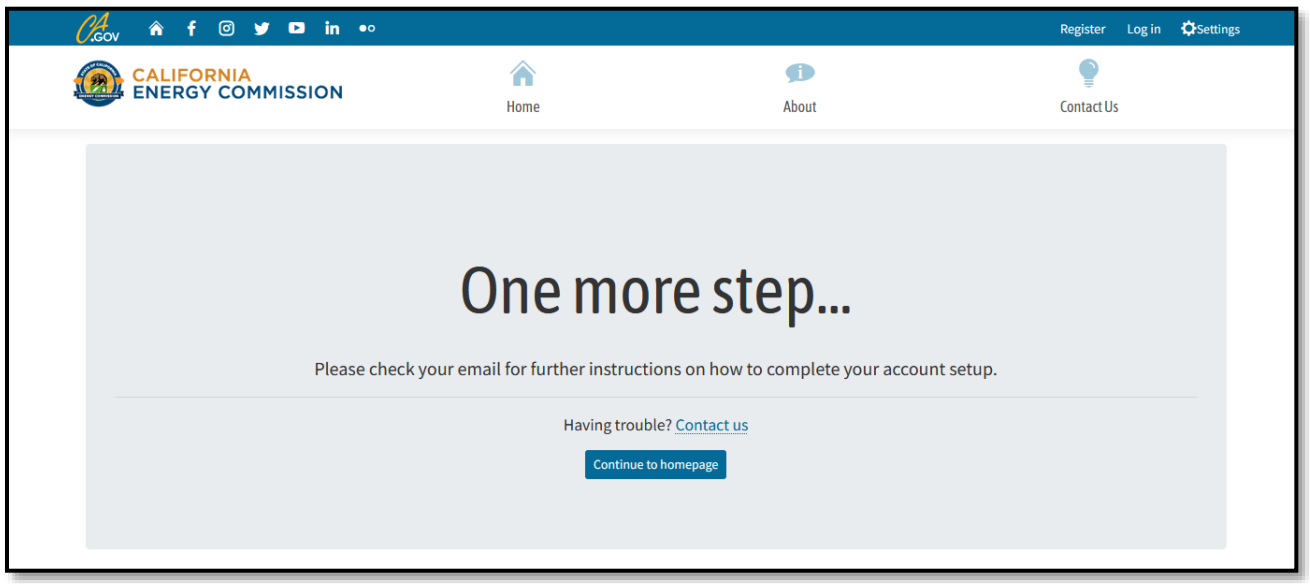
To begin, register for a BUILD Account at https://buildapp.energy.ca.gov and click on "Register" in the upper right corner of the screen.



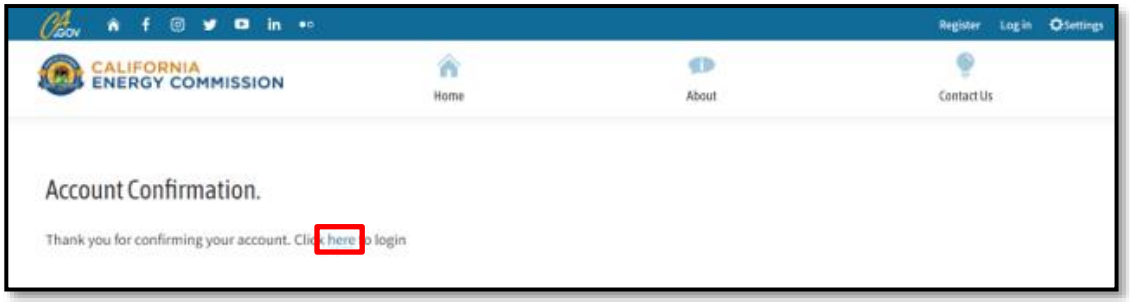
The "Register" button will open the account creation page. Fill in each section of the page with the proper user information. Once the registration information is complete, select "Register" at the bottom of the page.



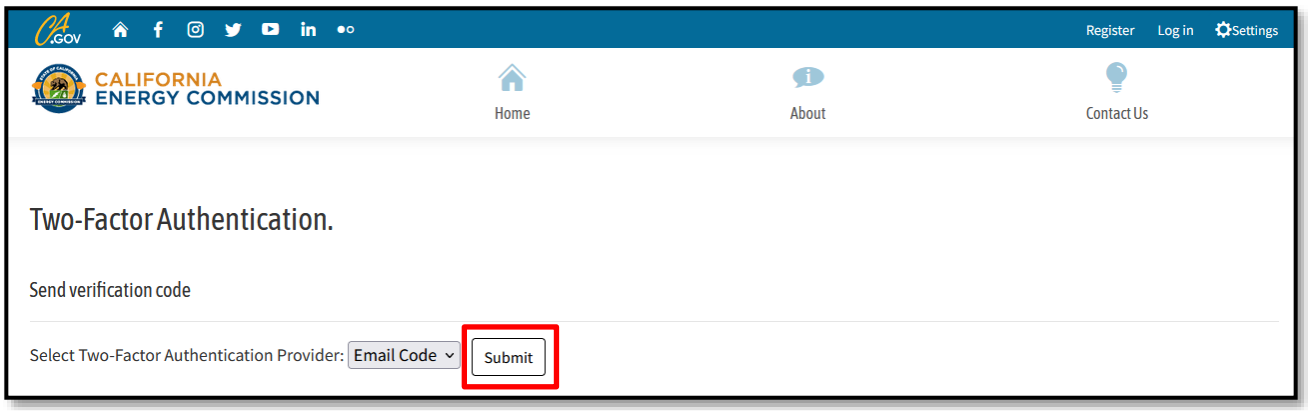
Once registration is complete and submitted, a verification email will be sent to the registered email. Follow the instructions in the email to verify the account.



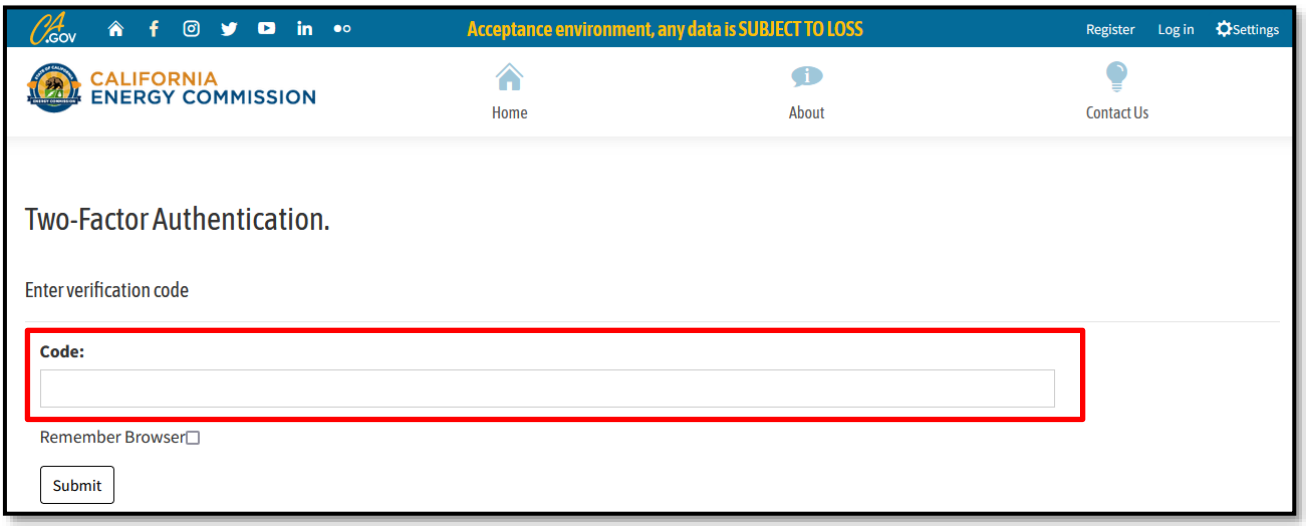
Once the email verification is complete, click on "here" highlighted below.



Log into BUILD Online with the newly verified credentials. BUILD Online requires multi-factor authentication for log in through the registered email. When prompted after logging in, select "Submit" which will send a verification code to the registered email address.

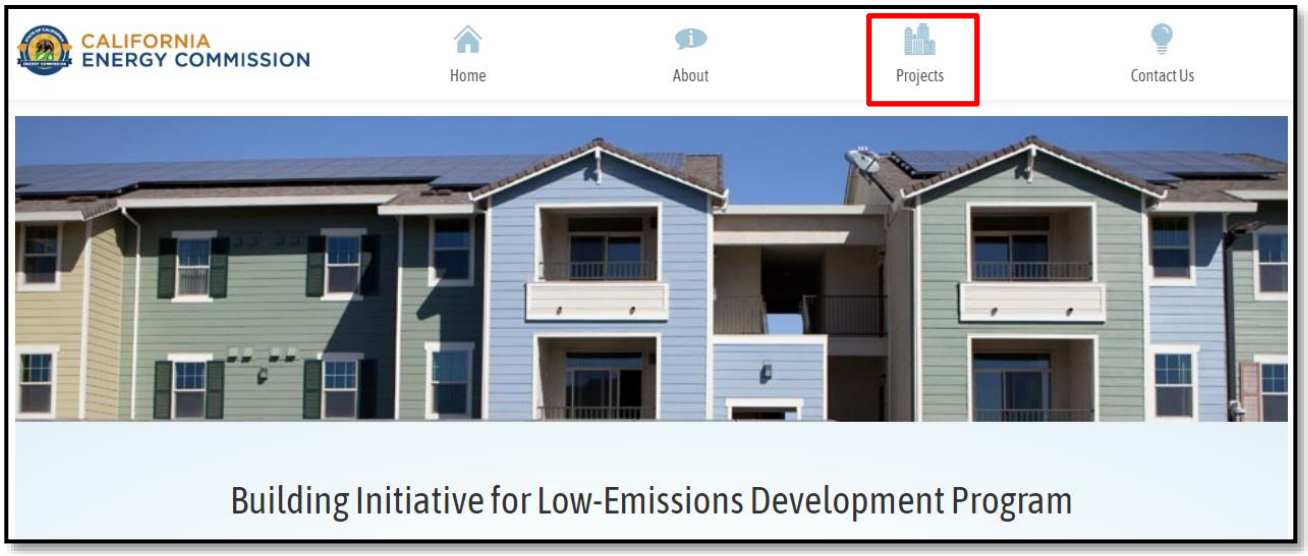


Insert the verification code into the box highlighted below.

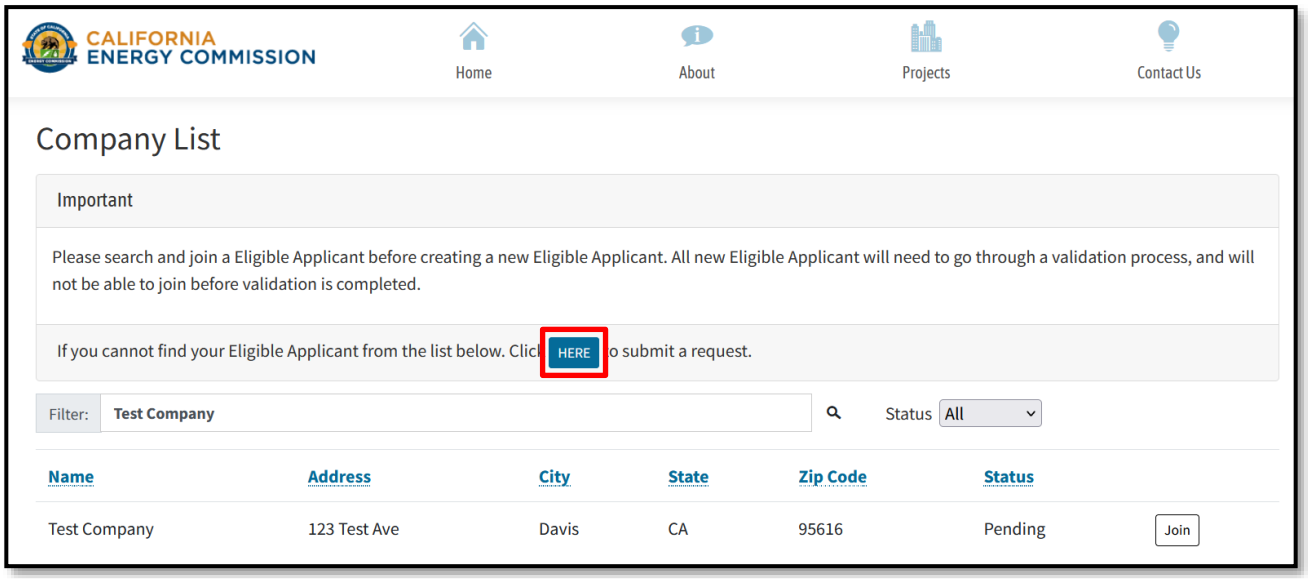


1.2 Creating a Company

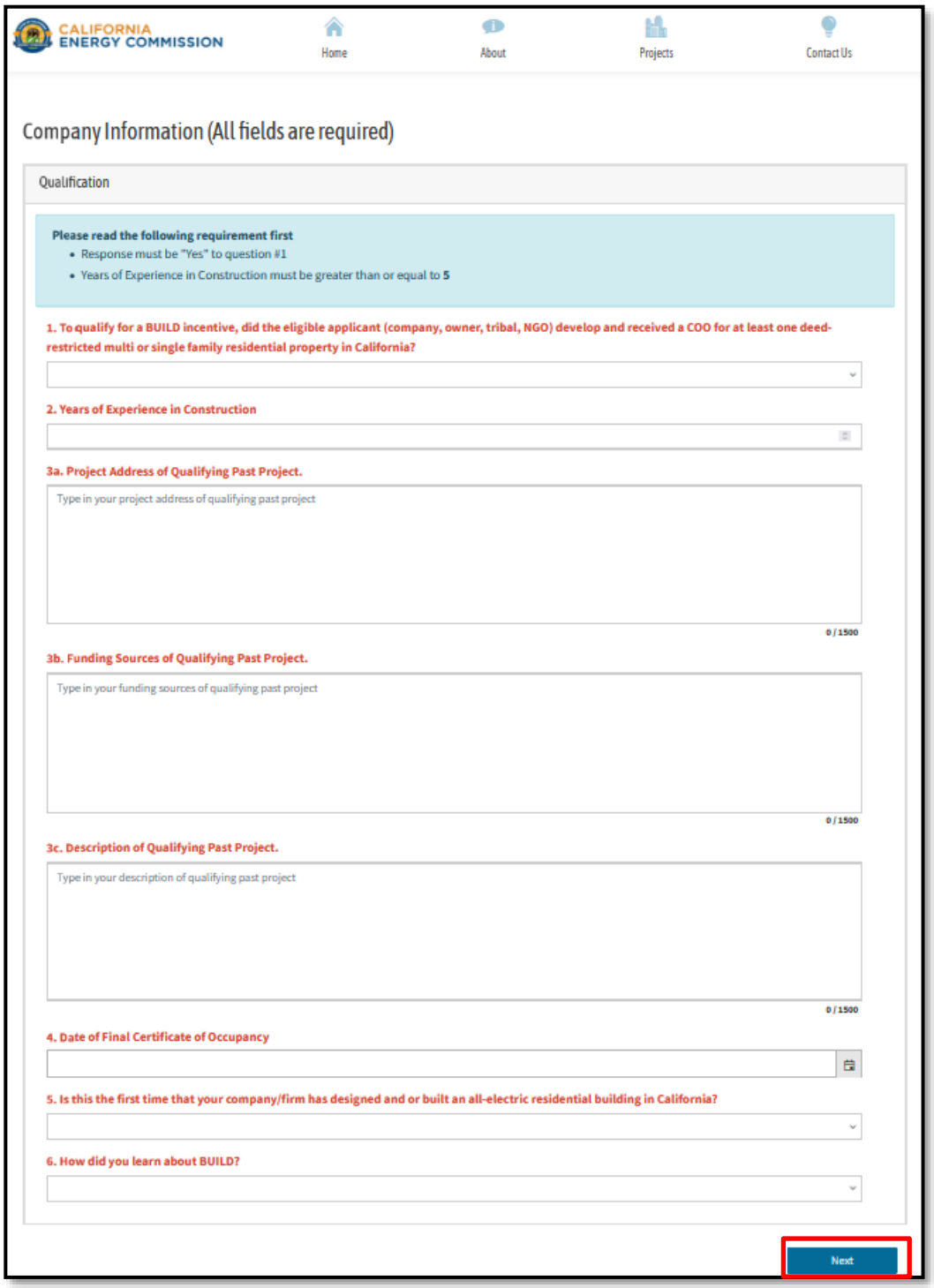
To submit a BUILD incentive application, an applicant must join an existing company that has previously applied to the BUILD Program or create a company. This section will cover creating a new company in BUILD Online. This is started by selecting "Projects" from the top header once logged into the system.



The "Projects" tab will display a list of existing companies, seen below, in which an applicant may request to "Join" as described in the following section. If the company you wish to apply for is not already listed, this page also allows for the creation of a new company profile.

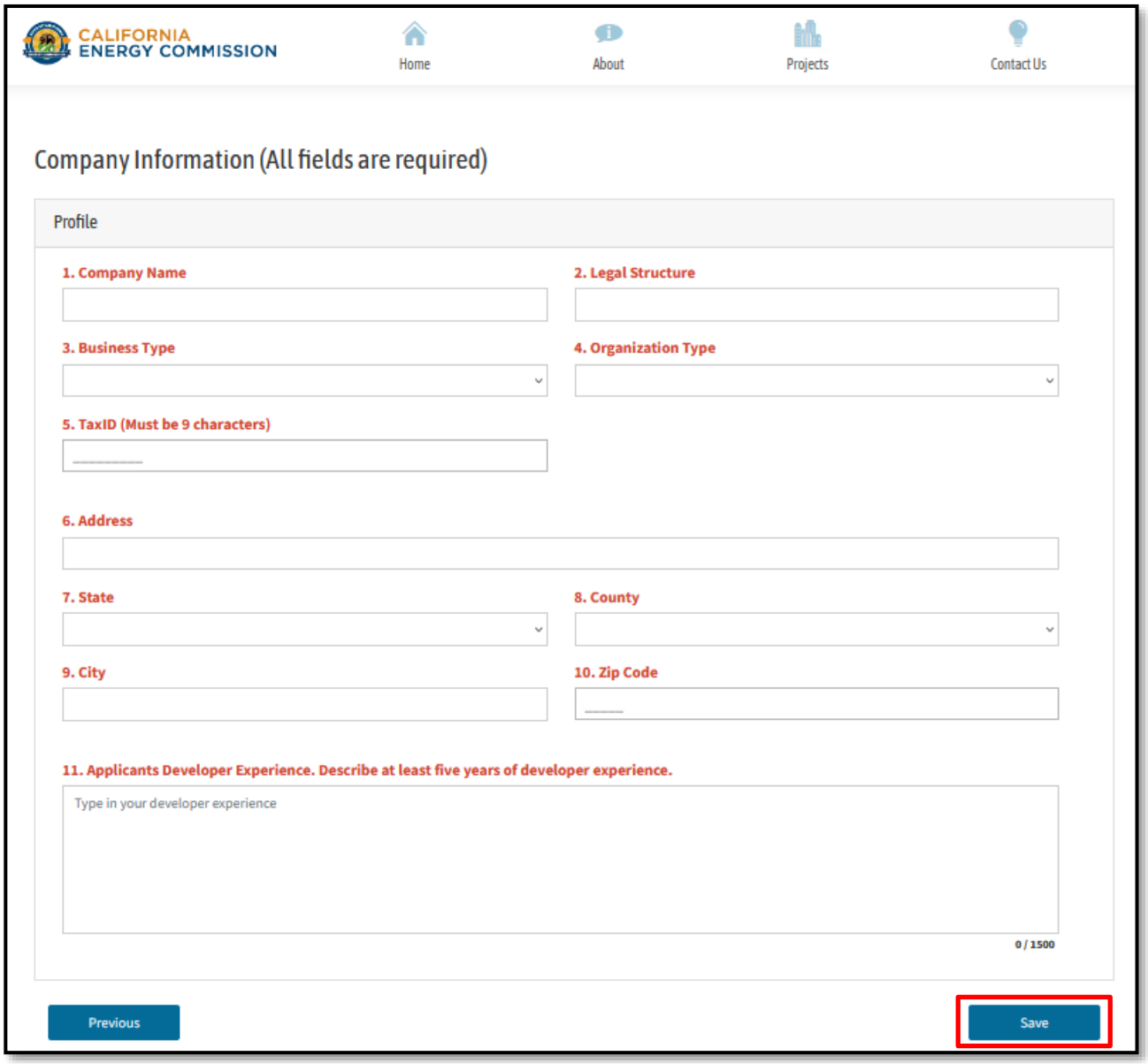


To create a company, select the "HERE" button, highlighted in red, on the Company List page. This will bring the user to the company information page, below.



Fill out each prompt on the page with the corresponding information and click the "Next"

button when finished. If the company meets the initial BUILD Program Guidelines requirements for an eligible applicant, then the profile page will appear. Please note that Question #5 decides the company's eligibility for the New Adopter Design Award during the Step 1: Design reservation application.



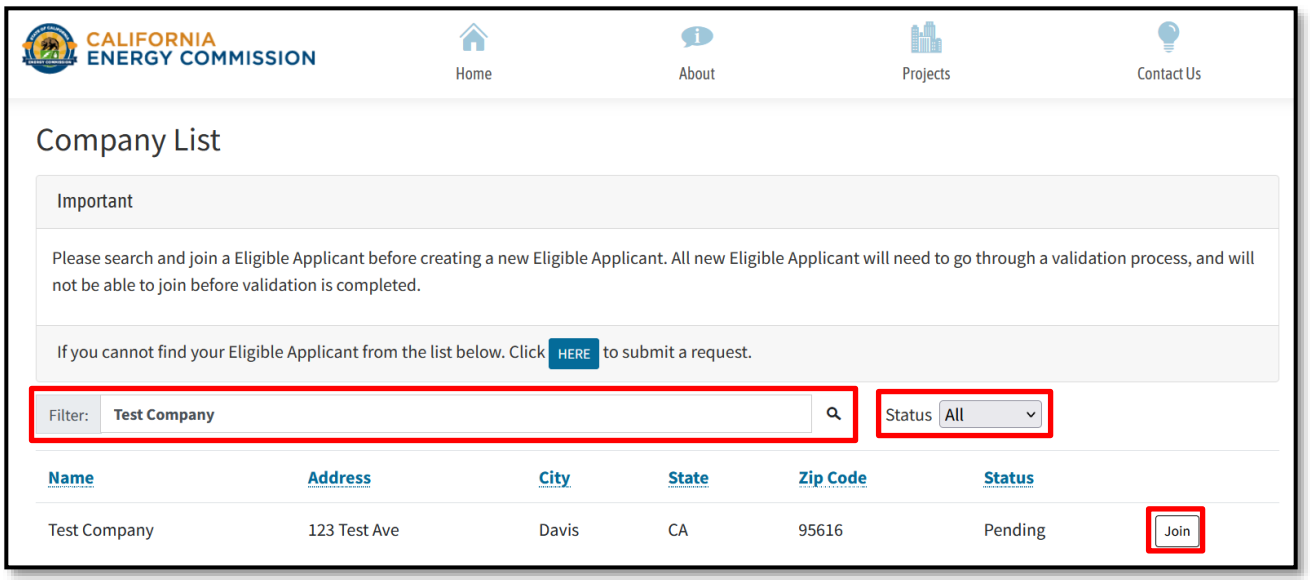
Input the proper information into the prompts on the profile page and click "Save" when complete. This will send the request to BUILD staff, and they will review the request for approval.

Once the company creation request is approved, the applicant will be notified by email and the company will appear on the Company List page.

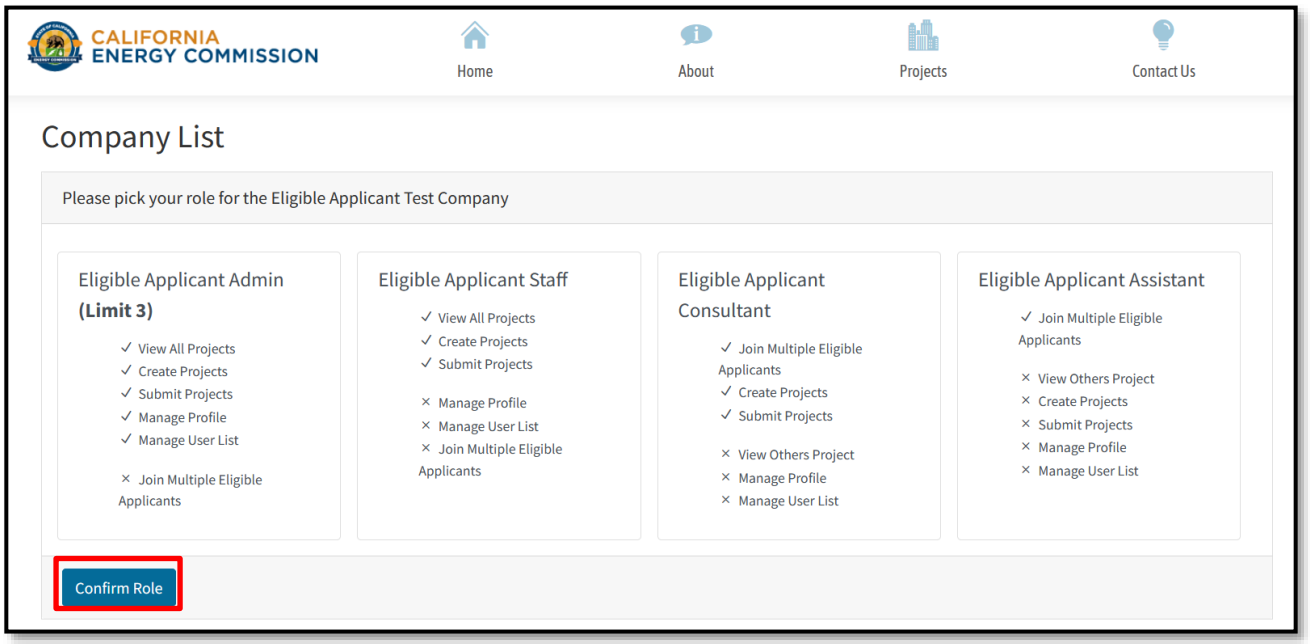
1.3 Joining a Company

To join an existing company, begin by searching for the company in the "Filter:" highlighted below. If the company's status is known, the search can be narrowed by selecting the status from the dropdown selection of the "Status" highlighted below.

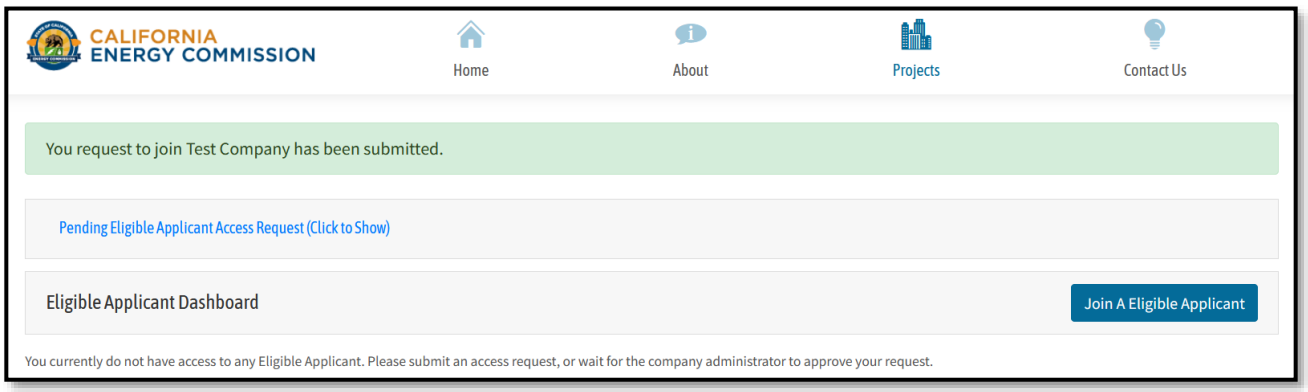
Once the company is found, join the company by selecting "Join" on the right side of the page.



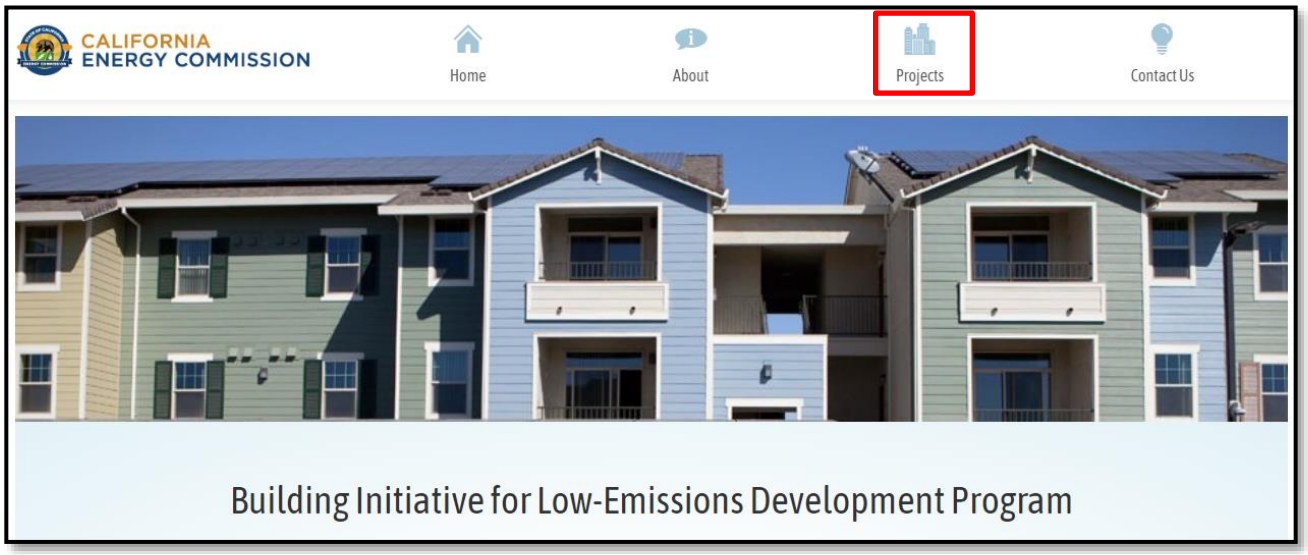
From here select your role within the company. Once selected, click "Confirm Role."



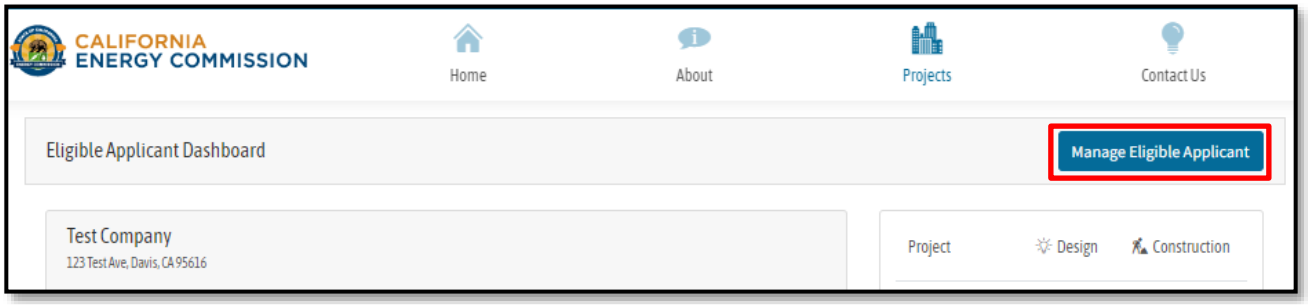
The following will appear once a user role is selected and submitted. The first applicant to join a company will automatically become a "Company Admin" with the ability to approve additional users.



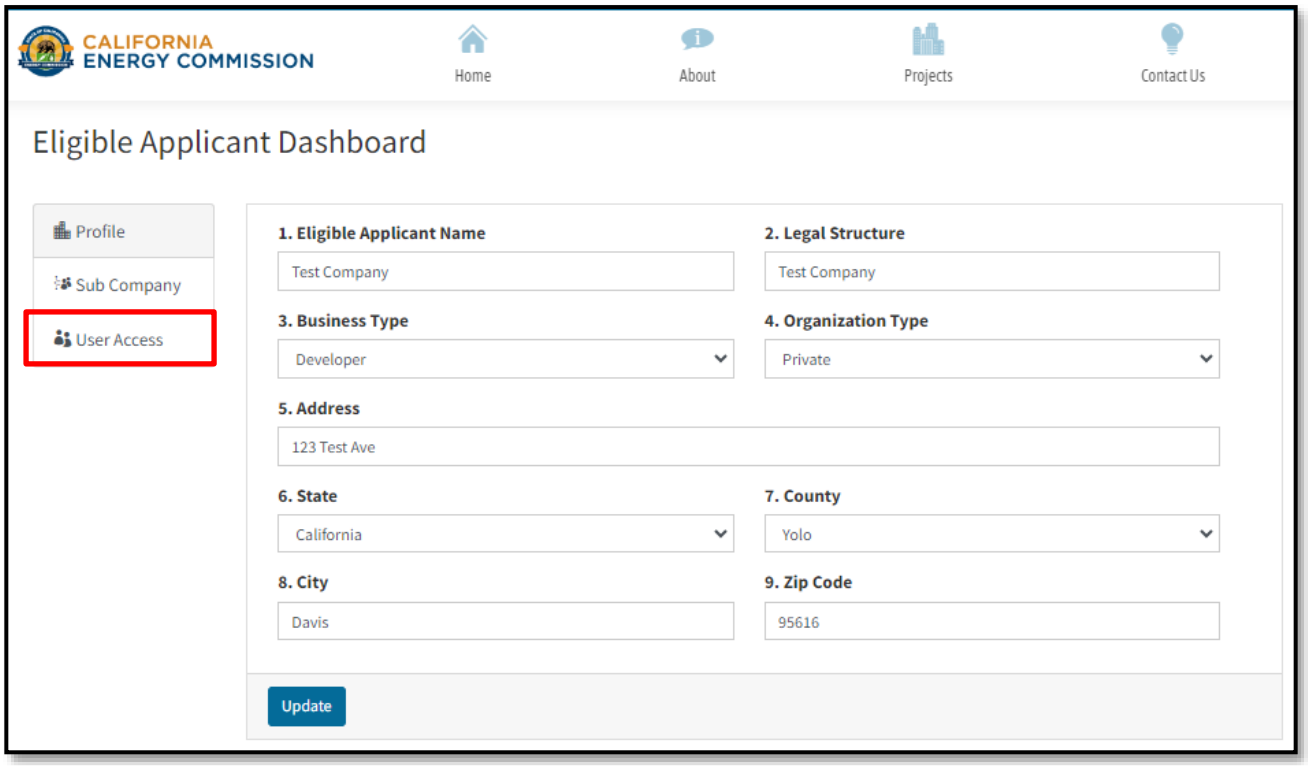
To approve new users by the Company Admin, navigate to the company dashboard by selecting "Projects" in the top right of the website.



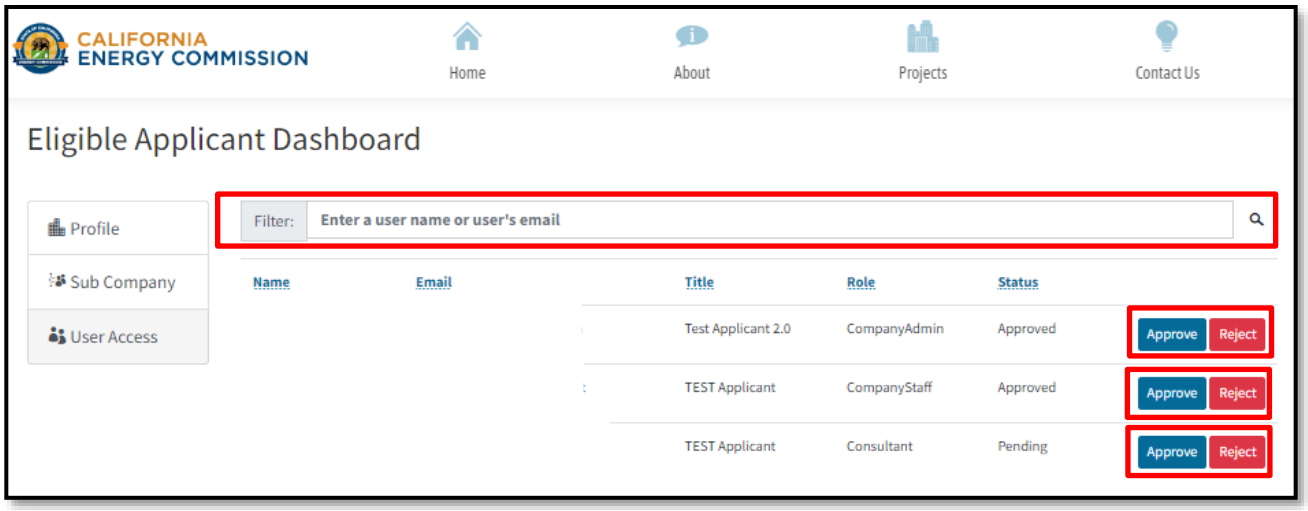
Next, select "Manage Eligible Applicant" to navigate to the company details. Company, Sub Company, and User Access are all managed through this tab.



Select "User Access" to find all company user information.



Users can be filtered, approved, and rejected through this tab. To filter various users, type the name or email in the search bar highlighted below. The Company Admin can approve or reject a user request by selecting the appropriate button (both highlighted below).



2. BUILD Online Application Submission

The BUILD Online reservation application form is organized in five sections:

1. Initial Screening (Project Information and Eligibility)
2. Supplemental Narrative
3. Calculator Upload
4. Supporting Documents
5. Summary

2.1 Overview of the BUILD Reservation Application

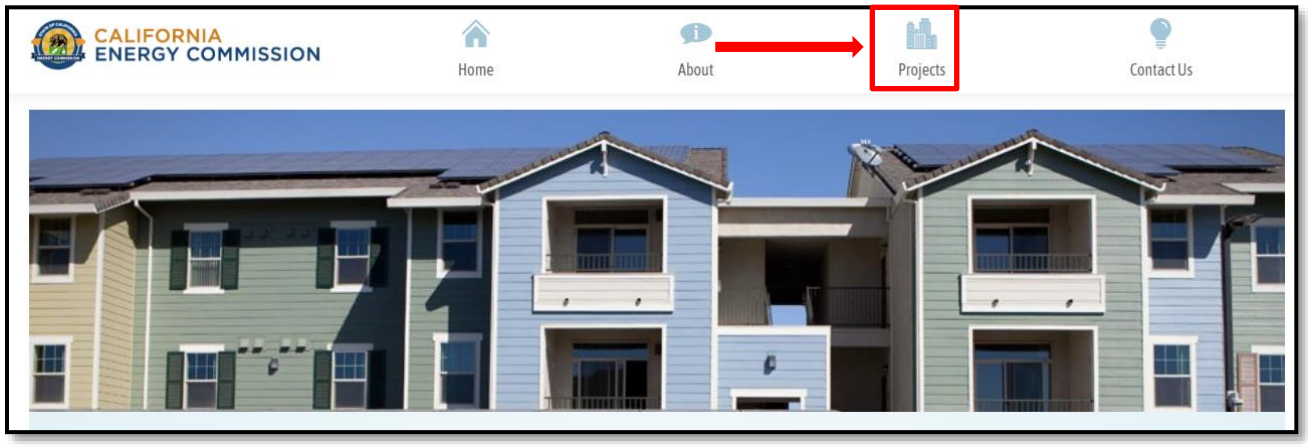
Applicants can apply for an incentive reservation and a new adopter design award, if applicable, using the BUILD Online system. Depending on the project stage, and the information provided in the application, the BUILD Online system will introduce new required data fields for each type of incentive reservation best matching the project information.

Pursuant to the BUILD Program Guidelines, the incentive application types include:

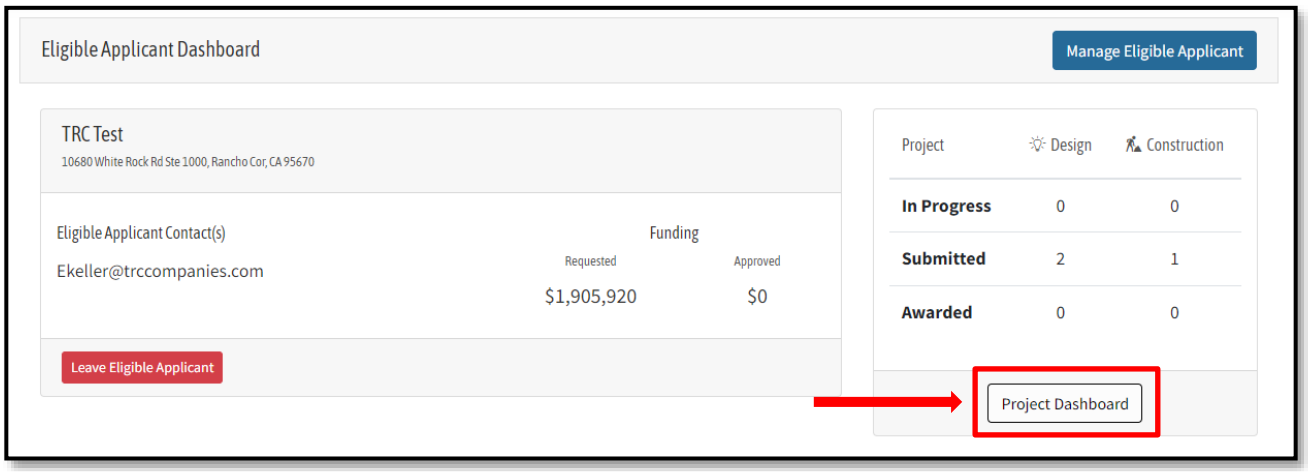
1. **Step 1: Design:** A design reservation is optional, used for projects still in a planning or design stage and without a building permit.
    - **New Adopter Design Award:** At the time of a design application, if an applicant has never received an all-electric residential building permit in California; and is developing its first all-electric low-income multifamily residential building of ten (10) units or more; the BUILD Program may provide a one-time reimbursement for paid invoices pertaining to architectural, engineering, energy consultation, or other eligible design-build services. The new adopter design award can reimburse up to $100,000 of eligible design expenses.
2. **Step 2: Construction:** Projects with an approved building permit, but not a temporary or final certificate of occupancy, must apply for a construction reservation.
3. **Step 3: Completion:** Approved Step 2: Construction projects that have received a temporary or permanent certificate of occupancy transition to Step 3: Completion to apply for final incentive payments and closeout.

2.2 BUILD Incentive Application

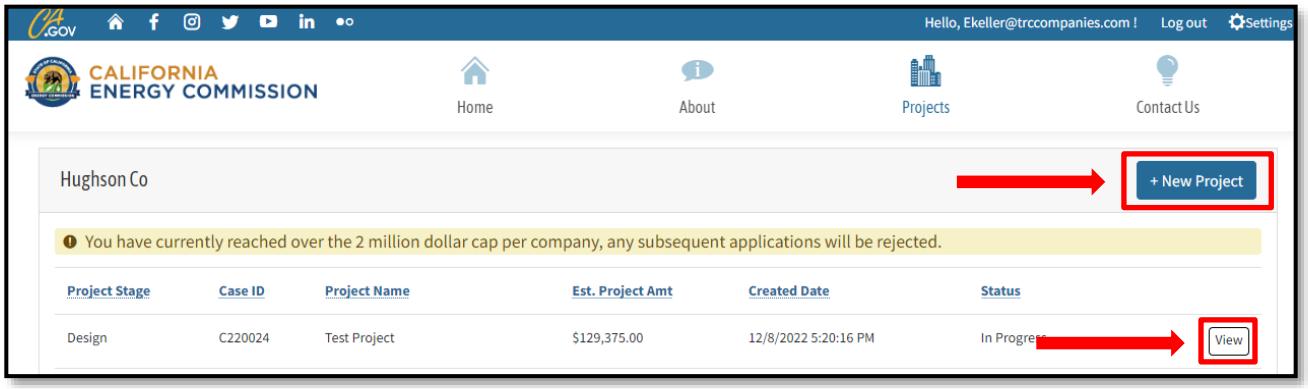
Once logged into BUILD Online, click "Projects" at the top of the page to create a new project application and review existing applications.



The landing page will show the company or "eligible applicant" you are associated with, and the incentives requested and approved for the company. On the right side of the page, view a summary of project statuses for the company. To start a new application, select the "Project Dashboard" button.



From here, select the "+ New Project" button on the right side of the webpage. Note, the Project Dashboard also allows users to view existing applications previously submitted or in progress. To review existing or in progress applications select "View" to expand the project details.



2.2.1. Initial Screening

On the first tab of the application titled "Initial Screening," provide the requested details pertaining to the project information, eligibility, technical assistance received, and the project stage which will identify if the application is in Step 1: Design or Step 2: Construction.

Project Information: Provide project details including project name, climate zone, and address. For assistance with identifying the climate zone, visit California Climate Zones.

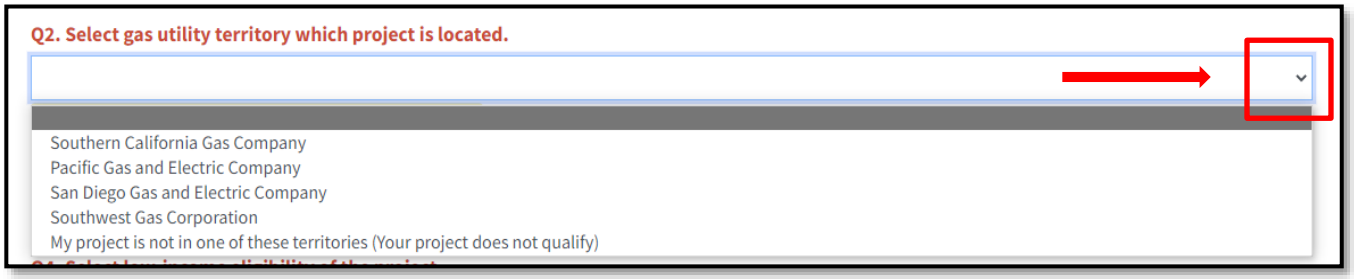
Eligibility Questionnaire: Information selected in this section will confirm the project's eligibility for BUILD incentives. Eligibility requirements include the project's fuel type, location in a participating gas territory, building type, and low-income limits.

All-Electric: To be eligible for BUILD incentives, a project must be all-electric. Select "Yes" from the dropdown menu to confirm the anticipated or under construction project is all-

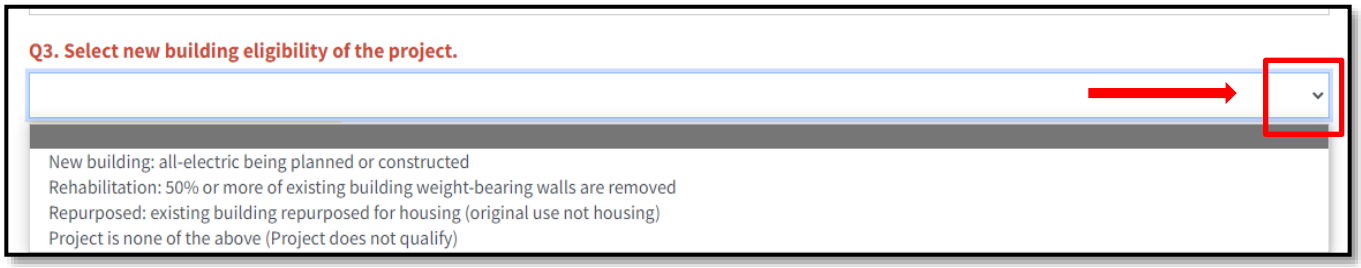
electric without gas distribution lines installed.

Gas Utility Territory: Pursuant to BUILD Program Guidelines, the project must be in one of four gas utility service areas: Southern California Gas Company, Pacific Gas and Electric, San Diego Gas & Electric, or Southwest Gas Corporation.

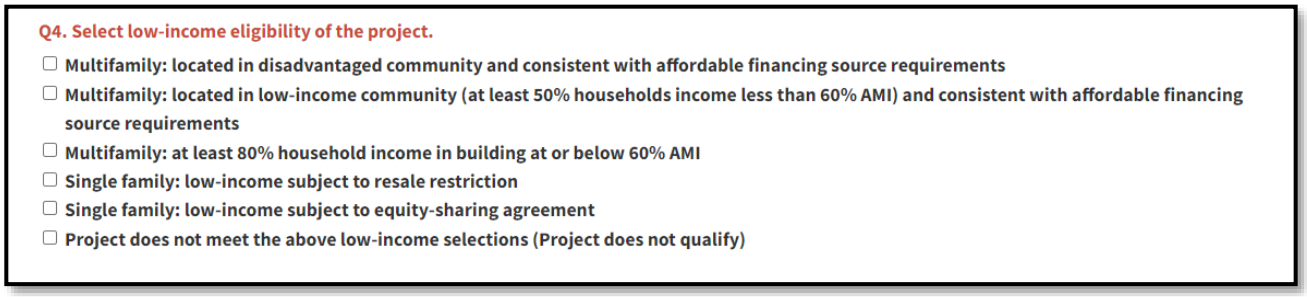
Choose one of the four gas utilities from the dropdown menu if the project resides in their service territory. If the project is not located in one of the four gas utility service territories, the project is ineligible for the BUILD Program.



Building Eligibility: Select one of the options from the dropdown menu. If the building type is not listed, the project is ineligible.



Low-Income Eligibility: To qualify for a BUILD incentive, the project must meet requirements for low-income residential housing income limits. Select one of the following options depicted in the figure below that represents the project's building type (single-family or multifamily) and low-income eligibility.



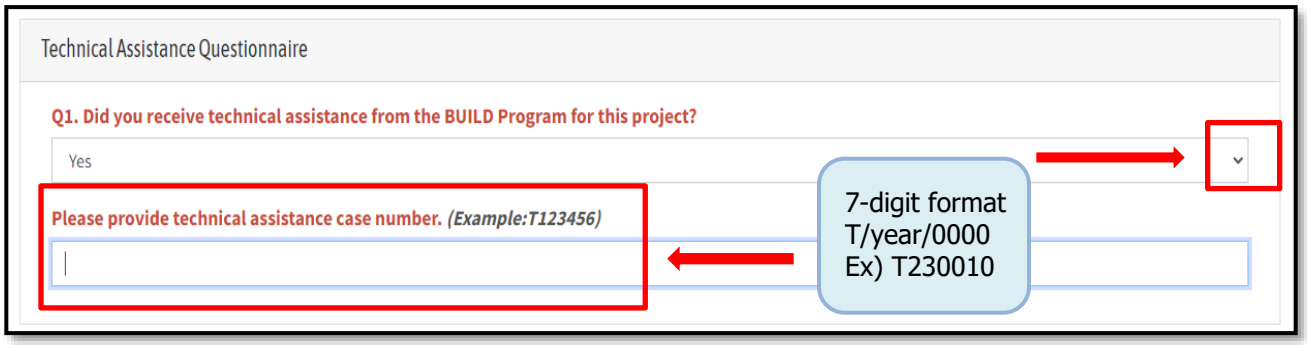
If the project's eligibility is based on its location in a disadvantaged community, provide the CalEnviroScreen number (1-100). For assistance with identifying the CalEnviroScreen number, please visit the California Communities Environmental Health Screening Tool.

For more information, and to ensure eligibility based on anticipated building type and low-income eligibility requirements, please refer to the BUILD Program Guidelines, Chapter 2: Eligibility.

Technical Assistance Questionnaire: If the applicant is approved for technical assistance on this project and assigned a BUILD Case ID from the TAP, select "Yes" in the dropdown box. A new field will populate to enter the unique BUILD Case ID. The project will be identified throughout its BUILD Program participation by this BUILD Case ID.

The BUILD Case ID is a 7-digit alphanumeric identification. Applicants who submit their reservation application without a BUILD Case ID will receive in their submission confirmation email a 7-digit identification number starting with C (denoting CEC initiation).

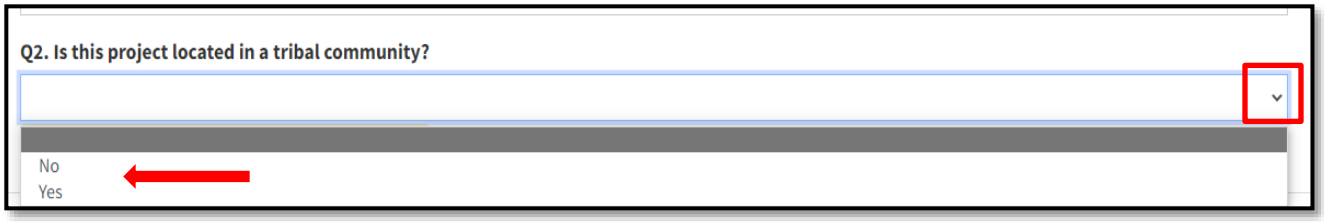
The example below is a Case ID that began with technical assistance and therefore starts with T (denoting technical assistance initiation).



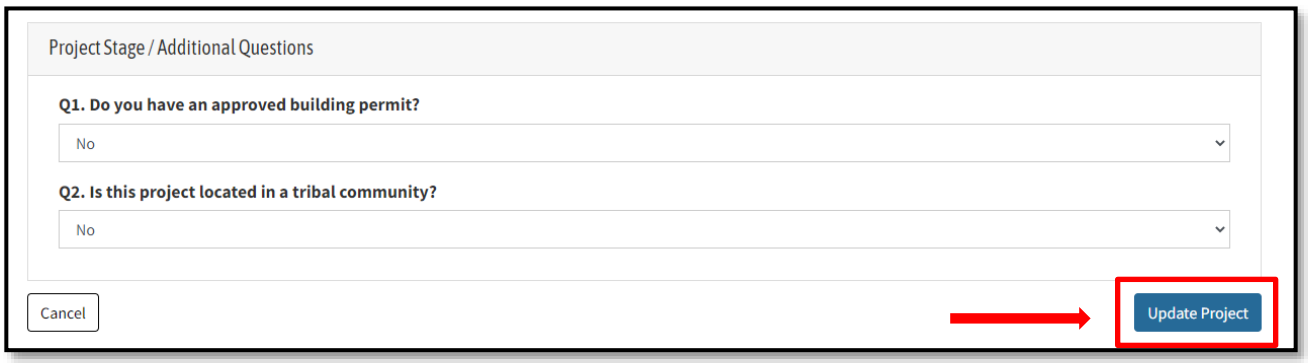
Project Stage Additional Questions: Use the dropdown menu to indicate if the project

has received an approved building permit. If the project has not received a building permit yet, the project is applying for a Step 1: Design reservation, and possibly the new adopter design award. If the project has received a building permit, the project is applying for a Step 2: Construction reservation.

Use the dropdown menu to indicate if the project is in a tribal community.



Select the "Update Project" button at the bottom of the screen to save progress. Note, to move on to next section, applicant must select the tab they want to complete as the system does not forward to next section automatically.

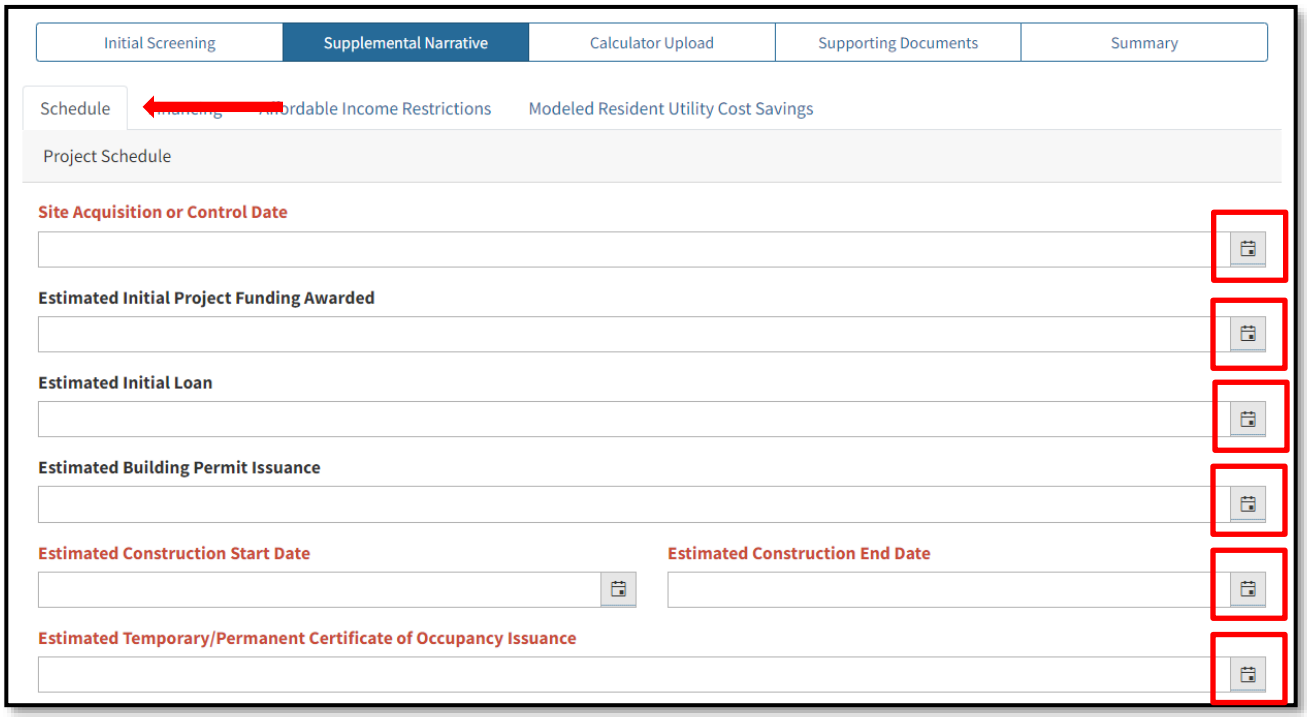


2.2.2. Supplemental Narrative

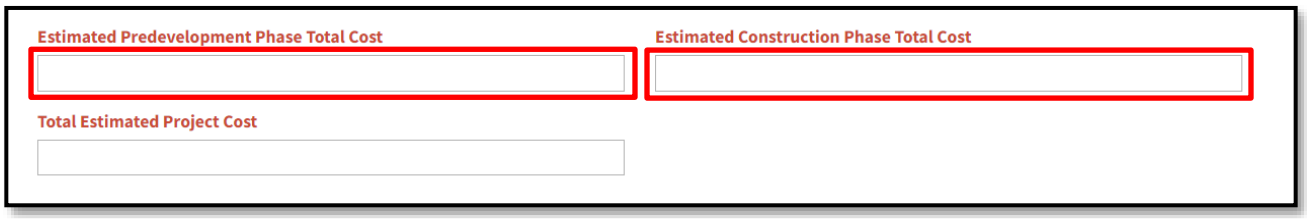
The Supplemental Narrative has four tabs outlined below to provide relevant project information.

Schedule: Select the first tab "Schedule" under the Supplemental Narrative header and

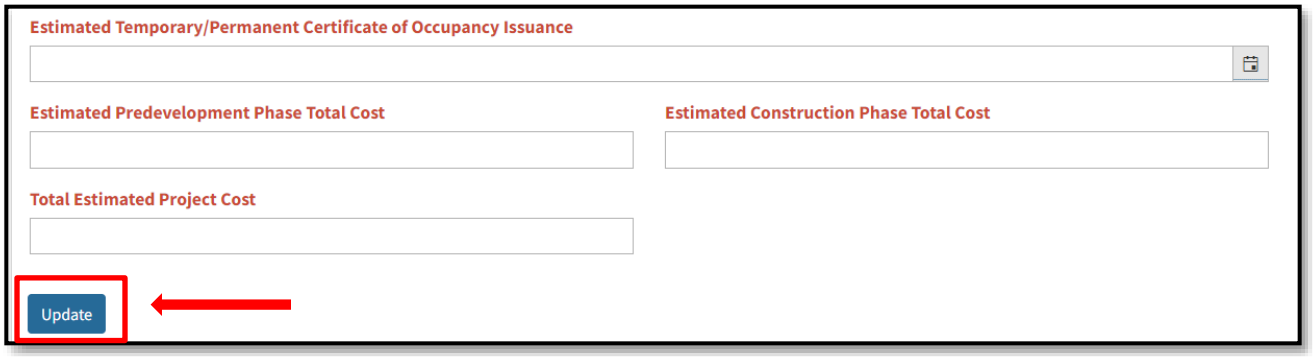
use the calendar popup menu to select the appropriate date for each of the mandatory fields in red, and the optional fields in black.



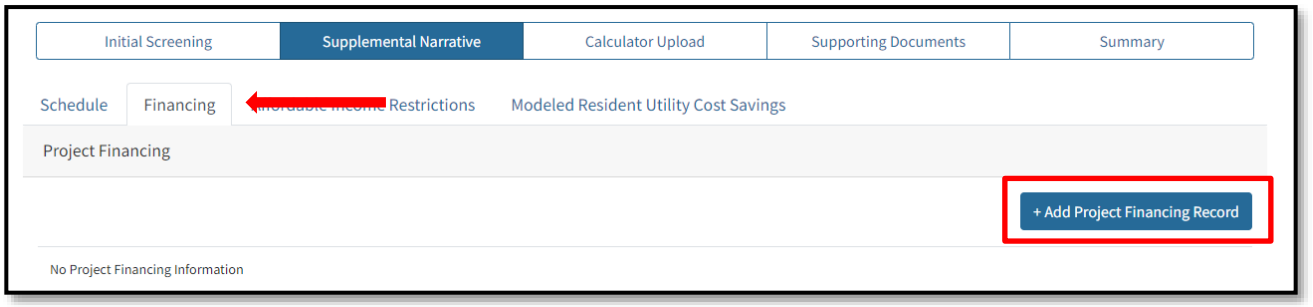
Cost estimates for the predevelopment and construction phase of the project are typed into the boxes shown below as well as the total estimated project cost. Do not enter a dollar sign or commas; these will automatically populate when a number is entered.



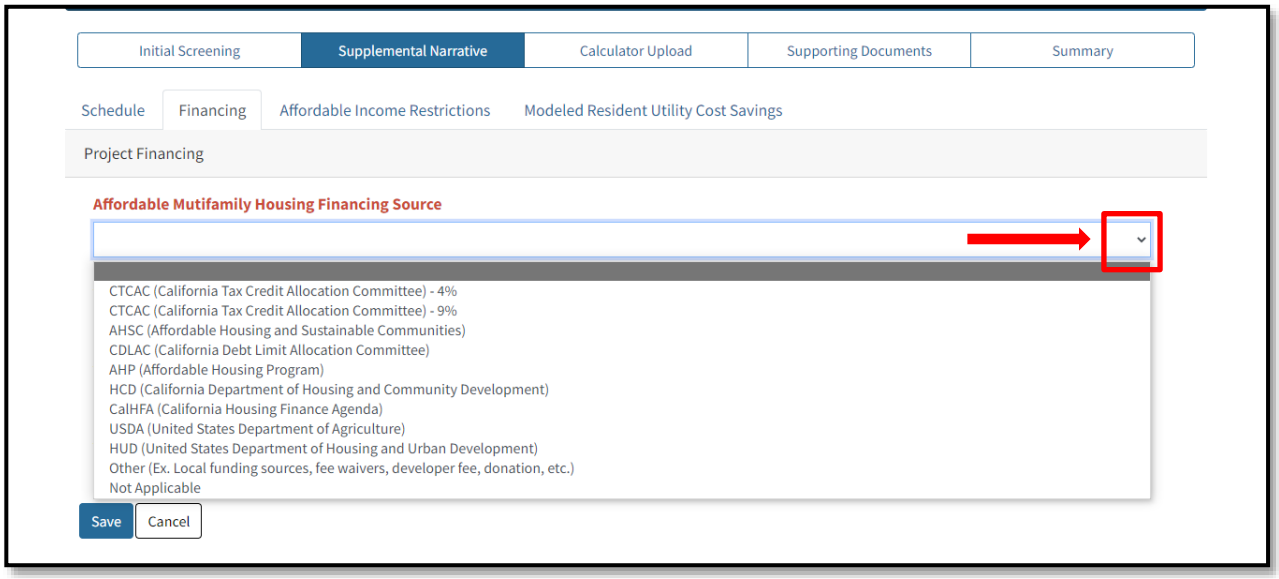
To proceed to the next section, or save application progress, use the "Update" button at the bottom of the page.



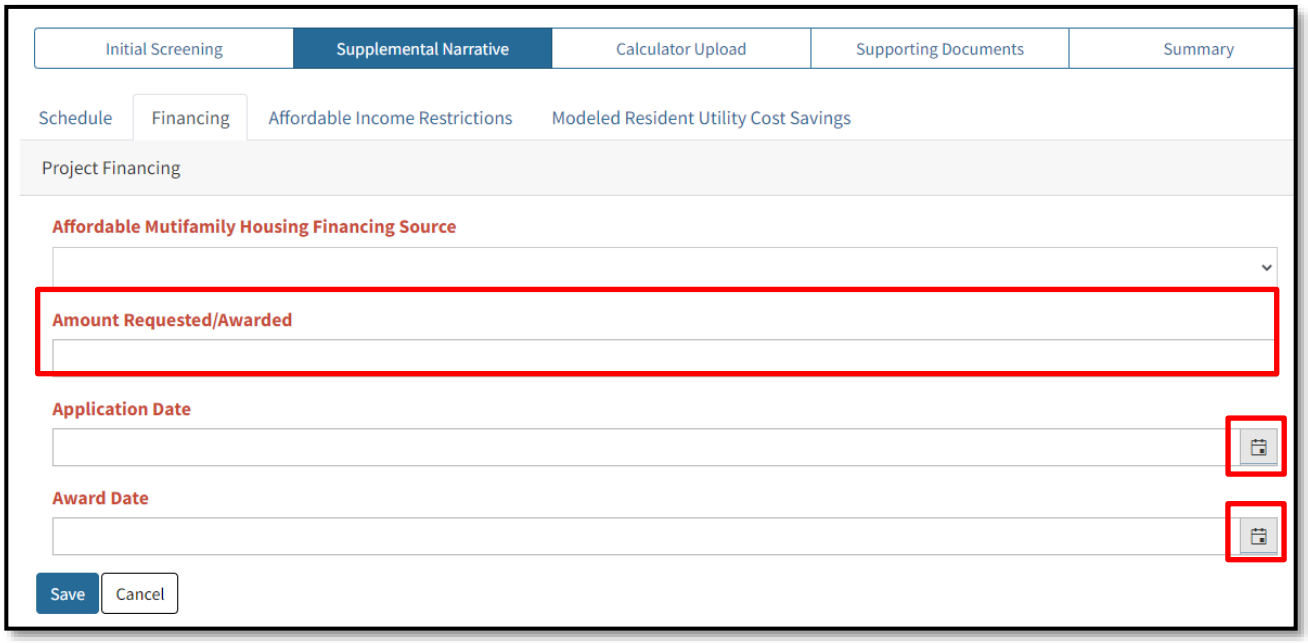
Financing: Select the second tab "Financing" under the Supplemental Narrative header and use the "+Add Project Financing Record" button to add a new financing record.



When applicable, BUILD Program Guidelines require a project's affordable income limits be consistent with the requirements of the affordable multifamily financing source. Please choose one of the available options from the dropdown menu. For low-income single-family residences, select Not Applicable.

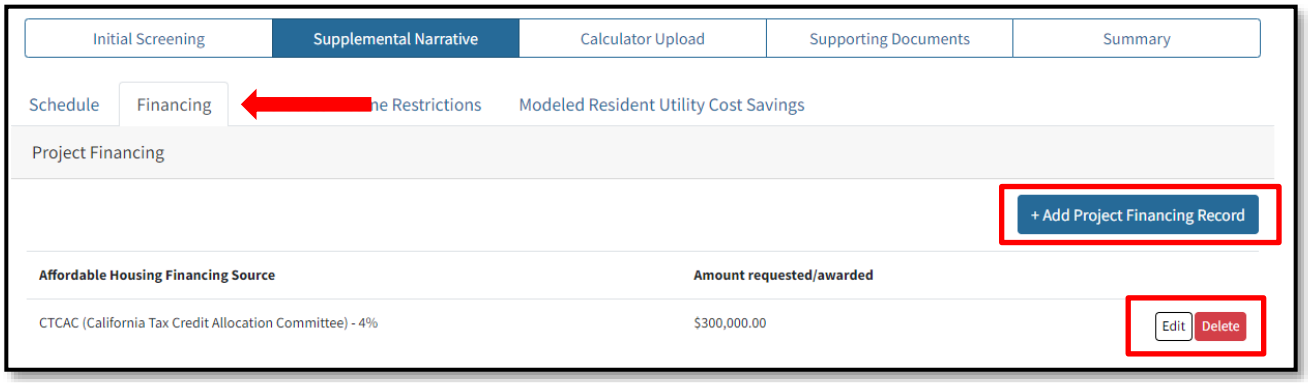


The BUILD Program Guidelines require funding details, including the amount requested or awarded and the anticipated date for applying to a financing source. As depicted below, please type in the amount requested or awarded from the selected financing source. Do not enter a dollar sign or commas; these will automatically populate when a number is typed in. Then, click on the calendar icon to select the date of the anticipated financing application date or the applied application date for affordable multifamily housing financing.

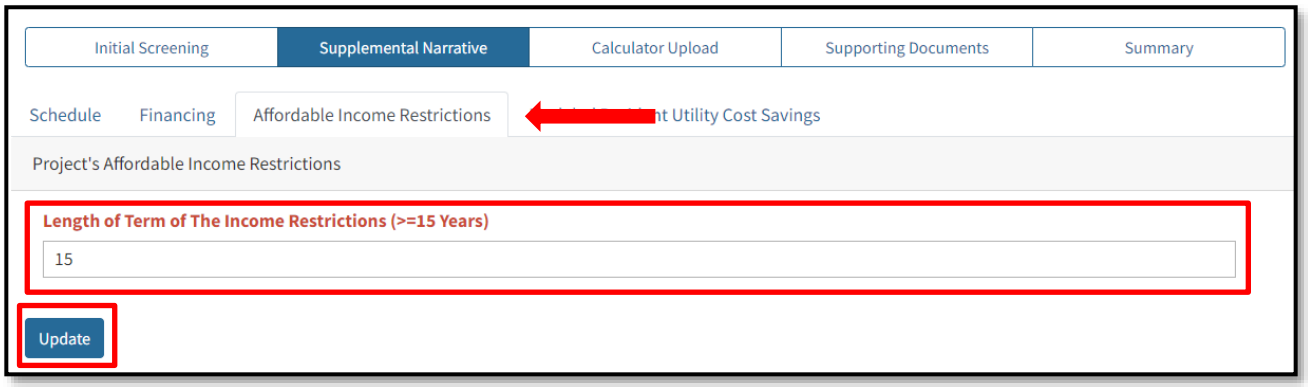


When the finance source record is completed, click the "Save" button on the bottom of the screen.

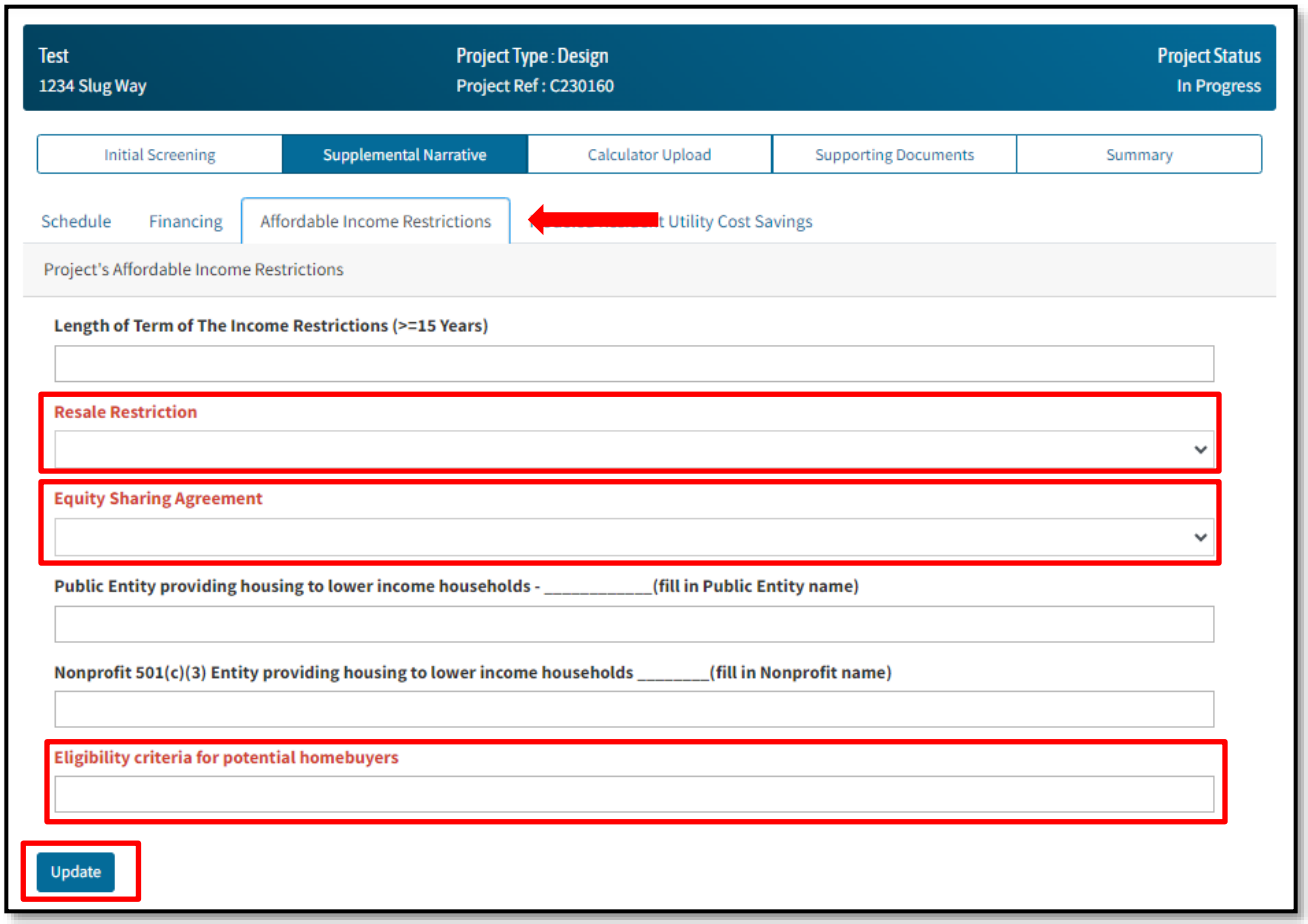
Once a record is saved, it will appear under the "Financing" tab. Continue to add financing records as appropriate using the "+Add Project Financing Record" button. Edit or delete previous records using the "Edit" and "Delete" buttons as shown below.



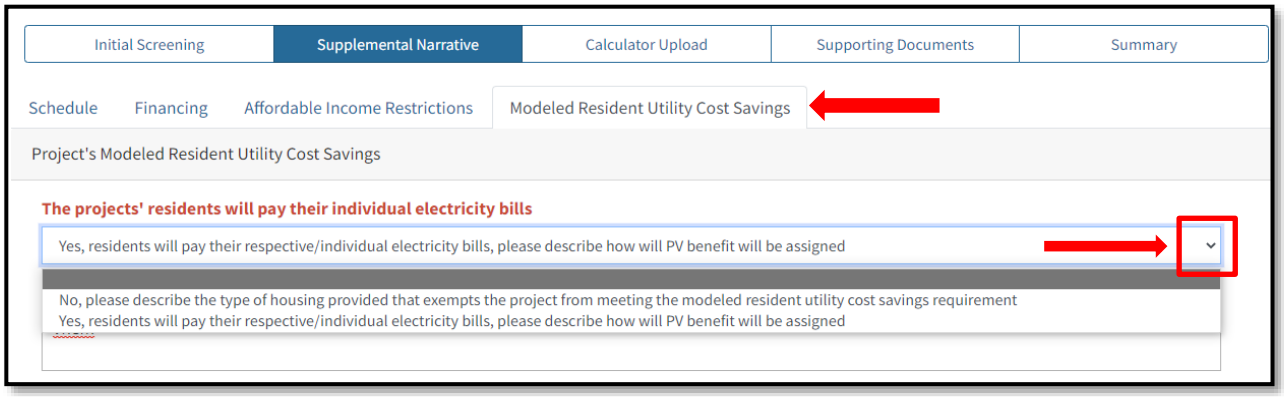
Affordable Income Restrictions: Select the third tab "Affordable Income Restrictions" under the Supplemental Narrative header. Pursuant to Program Guidelines, the length of low-income multifamily residential deed restriction receiving a BUILD incentive cannot be less than 15 years. If the project is a multifamily development, type the length of term of the income restrictions (years) into the textbox. After entering the term length in the text box, click the "Update" button to save progress.



If the project is a single-family development enter the resale restriction, equity sharing agreement, and the eligibility criteria for potential homebuyers. Once this information and any other optional information is entered, select "Update" to save the progress.

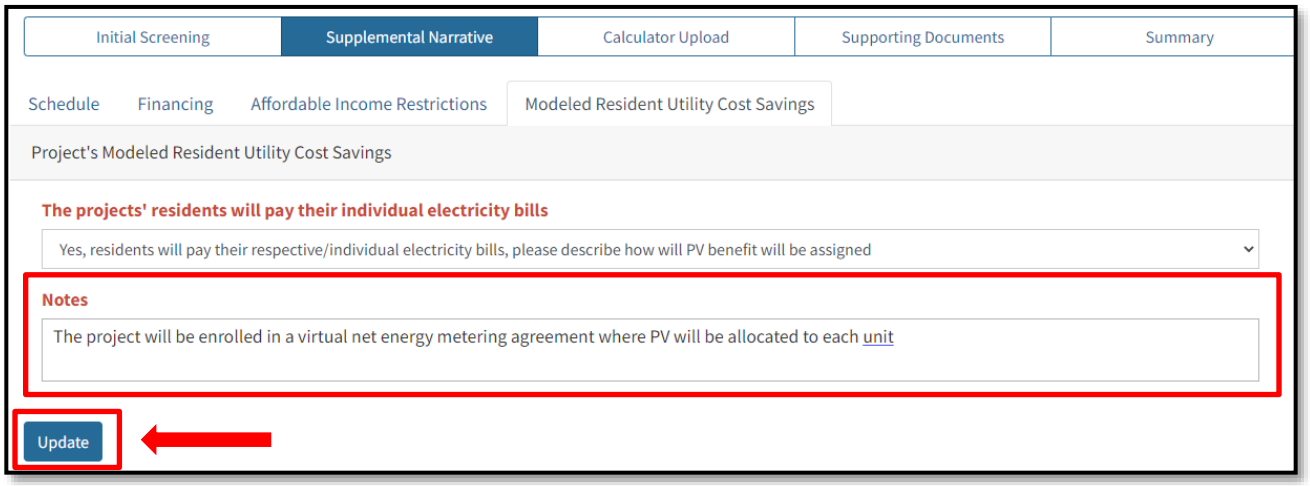


Modeled Resident Utility Cost Savings: Select the fourth tab "Modeled Utility Cost Savings" under the Supplemental Narrative header and use the dropdown to indicate if the project's future residents will pay their individual electricity bills.



After selecting an option from the dropdown, use the textbox to describe either how the solar photovoltaic will be assigned to the residents, or how the project will

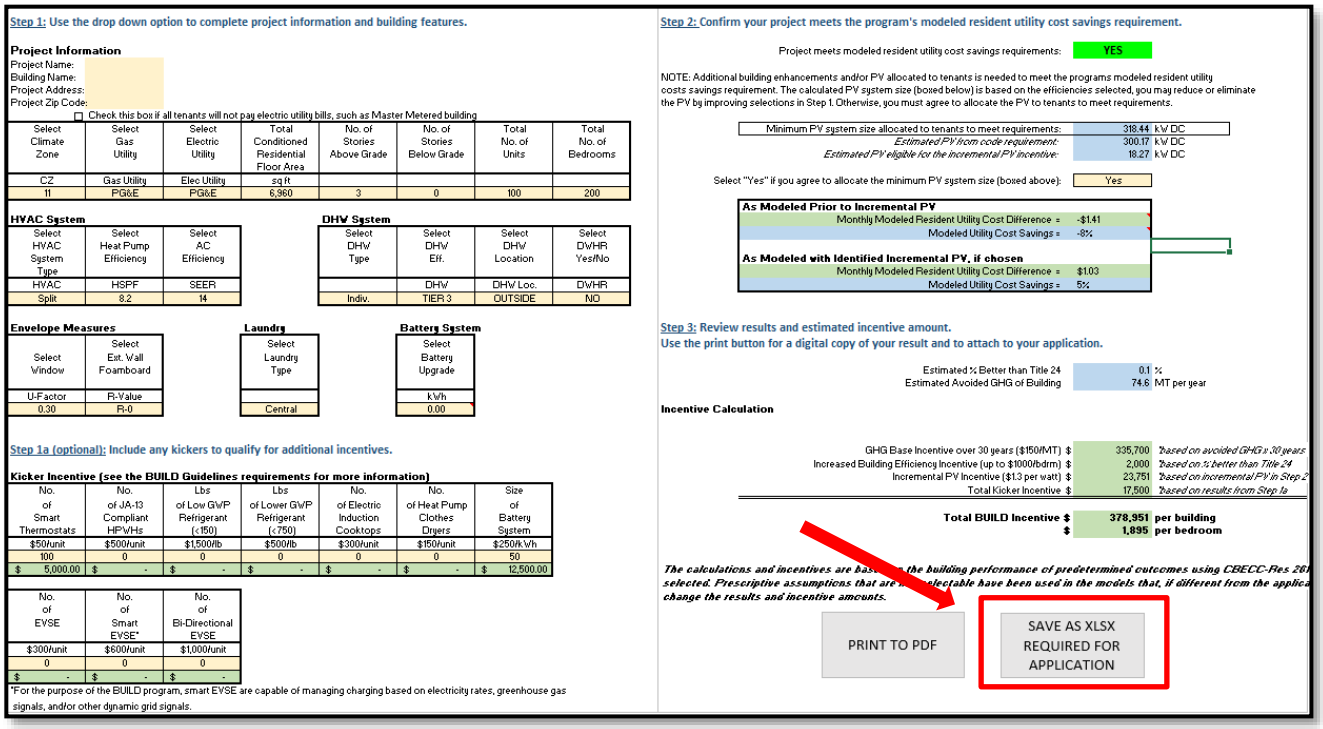
otherwise meet the modeled utility cost savings requirement as outlined in the guidelines. When completed, select the "Update" button to save progress.



2.2.3. Uploading Calculators

The "Calculator Upload" allows an upload of the completed BUILD Calculator (Step 1: Design reservation only) or Custom Path Tool (CPT) into the BUILD Online system. A CPT is preferred for a Step 1: Design reservation and required for Step 2: Construction reservation. The system will then read and record the applicable project information including the incentive estimate.

When the inputs are complete in the BUILD Calculator or CPT and ready to upload, select the "Save as XLSX" button in the bottom right corner of the application. This converts the file into a file type compatible with BUILD Online. **This is essential; other file types are not compatible and will result in an upload error.**



Step 1: Use the drop down option to complete project information and building features.

Project Information

Project Name:
Building Name:
Project Address:
Project Zip Code:

☐ Check this box if all tenants will not pay electric utility bills, such as Master Metered building

Select Climate Zone	Select Gas Utility	Select Electric Utility	Total Conditioned Residential Floor Area	No. of Stories Above Grade	No. of Stories Below Grade	Total No. of Units	Total No. of Bedrooms
CZ	Gas Utility	Elec Utility	sq ft				
11	PG&E	PG&E	6,960	3	0	100	200

HVAC System

Select HVAC System Type	Select Heat Pump Efficiency	Select AC Efficiency
HVAC	HSPF	SEER
Split	8.2	14

DHW System

Select DHW Type	Select DHW Eff.	Select DHW Location	Select DWHR Yes/No
	DHW	DHW Loc.	DWHR
Indiv.	TIER 3	OUTSIDE	NO

Envelope Measures

Select Window	Select Ext. Wall Foamboard
U-Factor	R-Value
0.30	R-0

Laundry

Select Laundry Type
Central

Battery System

Select Battery Upgrade
kWh
0.00

Step 1a (optional): Include any kickers to qualify for additional incentives.

Kicker Incentive (see the BUILD Guidelines requirements for more information)

No. of Smart Thermostats	No. of JA-13 Compliant HPWHs	Lbs of Low GWP Refrigerant (<150)	Lbs of Lower GWP Refrigerant (<750)	No. of Electric Induction Cooktops	No. of Heat Pump Clothes Dryers	Size of Battery System
$50/unit	$500/unit	$1,500/lb	$500/lb	$300/unit	$150/unit	$250/kWh
100	0	0	0	0	0	50
$ 5,000.00	$ -	$ -	$ -	$ -	$ -	$ 12,500.00

No. of EVSE	No. of Smart EVSE*	No. of Bi-Directional EVSE
$300/unit	$600/unit	$1,000/unit
0	0	0
$ -	$ -	$ -

*For the purpose of the BUILD program, smart EVSE are capable of managing charging based on electricity rates, greenhouse gas signals, and/or other dynamic grid signals.

Step 2: Confirm your project meets the program's modeled resident utility cost savings requirement.

Project meets modeled resident utility cost savings requirements: YES

NOTE: Additional building enhancements and/or PV allocated to tenants is needed to meet the programs modeled resident utility costs savings requirement. The calculated PV system size (boxed below) is based on the efficiencies selected, you may reduce or eliminate the PV by improving selections in Step 1. Otherwise, you must agree to allocate the PV to tenants to meet requirements.

Minimum PV system size allocated to tenants to meet requirements:	318.44	kW DC
Estimated PV from code requirement:	300.17	kW DC
Estimated PV eligible for the incremental PV incentive:	18.27	kW DC

Select "Yes" if you agree to allocate the minimum PV system size (boxed above): Yes

As Modeled Prior to Incremental PV		
Monthly Modeled Resident Utility Cost Difference =	-$1.41	
Modeled Utility Cost Savings =	-8%	
As Modeled with Identified Incremental PV, if chosen		
Monthly Modeled Resident Utility Cost Difference =	$1.03	
Modeled Utility Cost Savings =	5%	

Step 3: Review results and estimated incentive amount.
Use the print button for a digital copy of your result and to attach to your application.

Estimated % Better than Title 24	0.1	%
Estimated Avoided GHG of Building	74.6	MT per year

Incentive Calculation

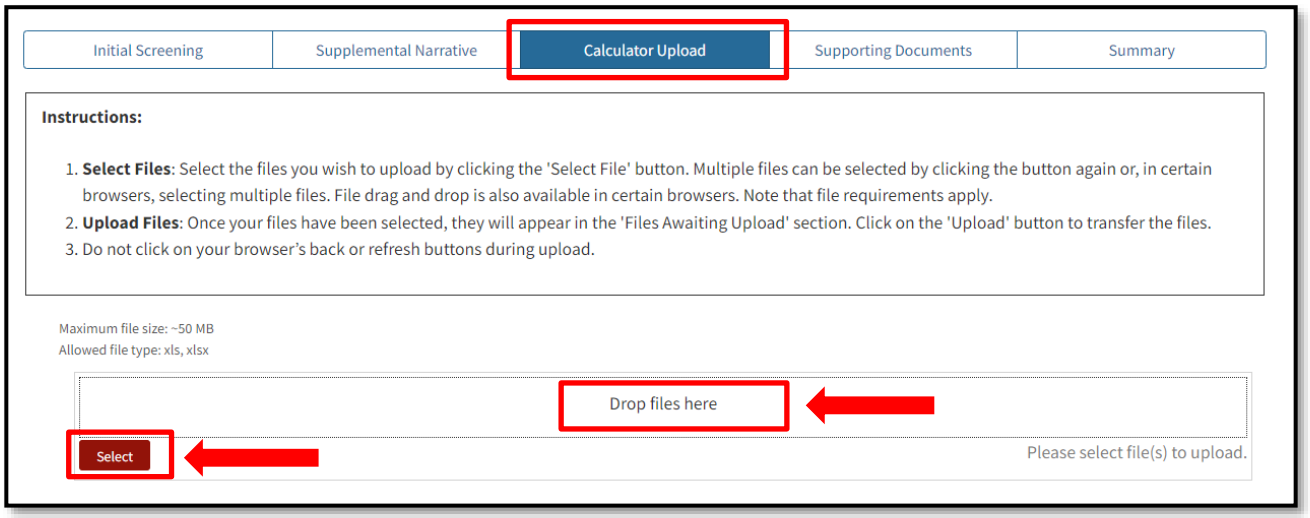
GHG Base Incentive over 30 years ($150/MT)	$ 335,700	*based on avoided GHG x 30 years*
Increased Building Efficiency Incentive (up to $1000/bdrm)	$ 2,000	*based on % better than Title 24*
Incremental PV Incentive ($1.3 per watt)	$ 23,751	*based on incremental PV in Step 2*
Total Kicker Incentive	$ 17,500	*based on results from Step 1a*
Total BUILD Incentive	**$ 378,951**	**per building**
	$ 1,895	**per bedroom**

The calculations and incentives are based on the building performance of predetermined outcomes using CBECC-Res 20[illegible] selected. Prescriptive assumptions that are [illegible]selectable have been used in the models that, if different from the applica change the results and incentive amounts.

PRINT TO PDF

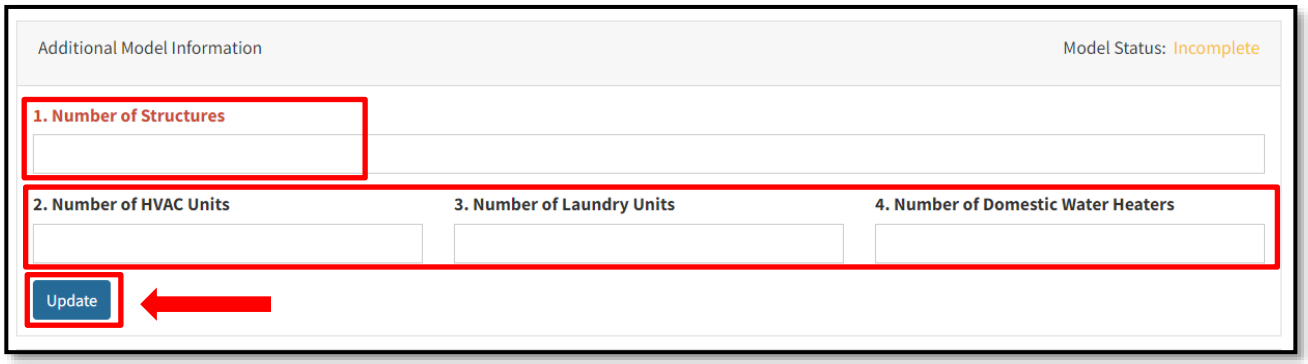
SAVE AS XLSX REQUIRED FOR APPLICATION

When the file is ready for upload, either drag and drop the file into the upload box or press the "Select" button and choose the file from the device.

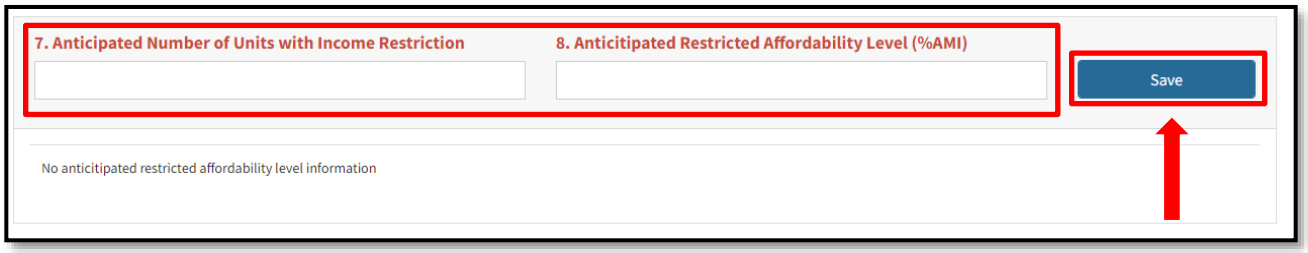


Once successfully uploaded, it will appear in a checklist at the bottom of the screen. The status will show as incomplete until the additional model information is provided. Click the "Edit" button to enter the additional model information. To remove the file uploaded, click the "Delete" button.

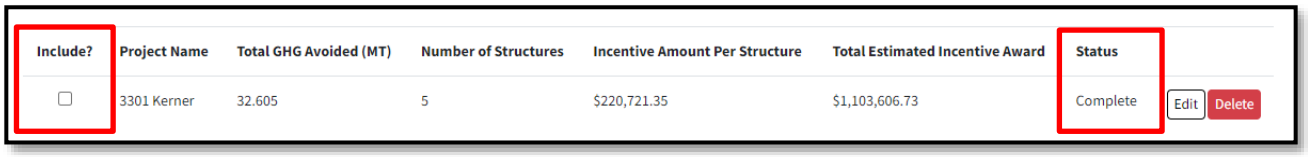
On the landing page under "Additional Model Information" enter the number of structures, heating, ventilation, and air conditioning (HVAC) units, laundry units, and water heaters specific to the uploaded calculator. Structures refer to the number of buildings or homes. The number of HVAC and laundry units reflect the number of structures and match the preliminary or final Certificate of Compliance documents. For example, if the uploaded calculator is for five buildings with ten HVAC units each, enter 50 under "Number of HVAC Units." Select the "Update" button to save progress.



To complete the additional model information, enter the anticipated number of units with income restrictions and the affordability level (percent of area median income or AMI) for those units. Select "Save" to save progress.



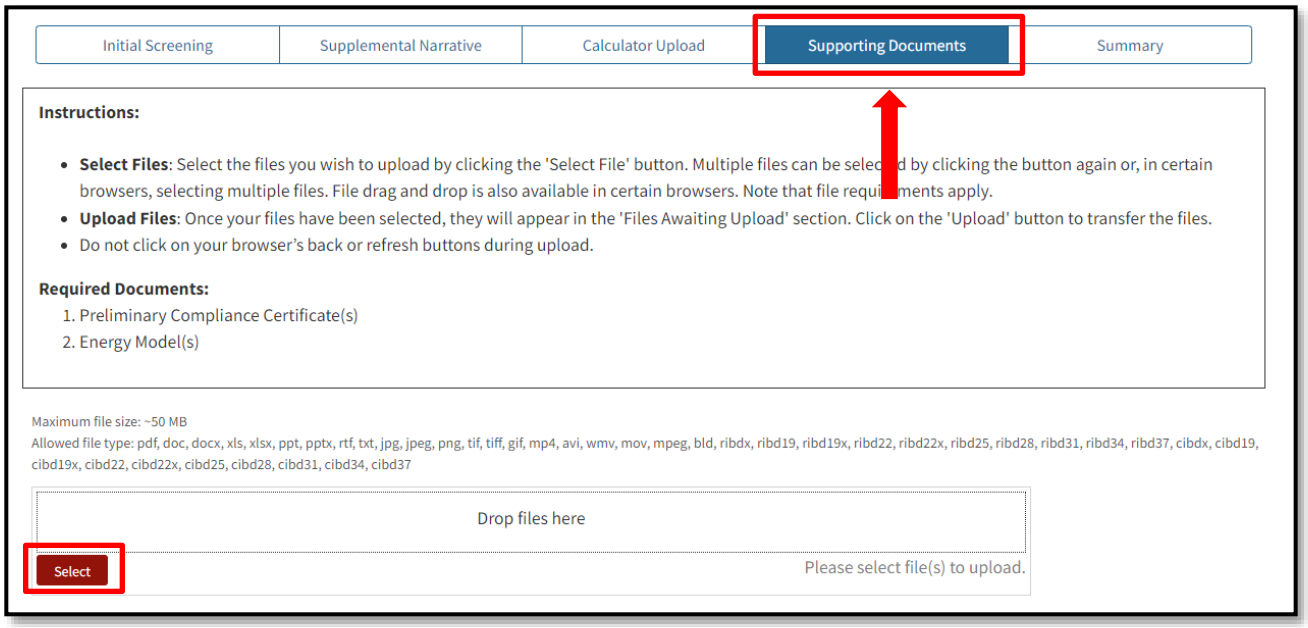
Once the additional model information is complete, the status will show as "Complete" on the Calculator Upload tab as shown below. Continue to upload the applicable calculators/CPTs for all project structures. Select the "Include" box for all the BUILD Calculators/CPTs included in the application. If the "Include" box is not selected, the incentives for those calculator(s) will not be populate in the incentive totals shown on the Summary tab.



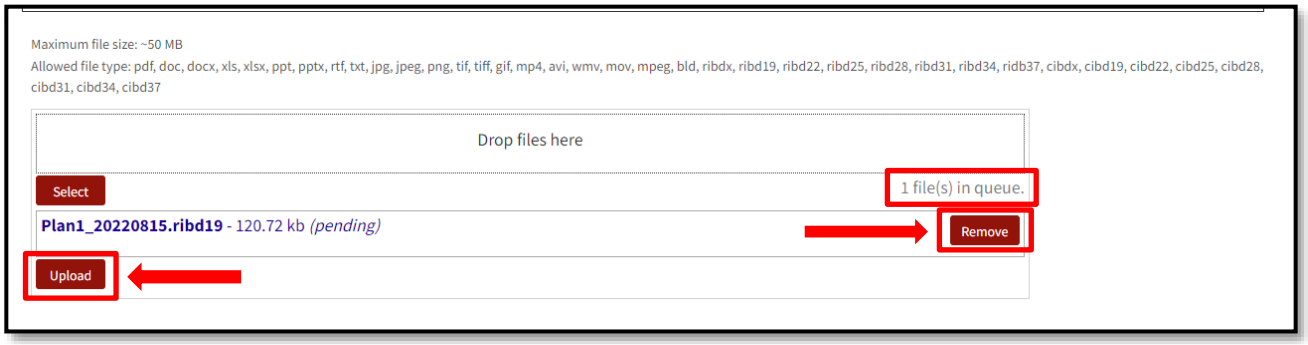
Include?	Project Name	Total GHG Avoided (MT)	Number of Structures	Incentive Amount Per Structure	Total Estimated Incentive Award	Status	
☐	3301 Kerner	32.605	5	$220,721.35	$1,103,606.73	Complete	Edit Delete

2.2.4. Supporting Documents

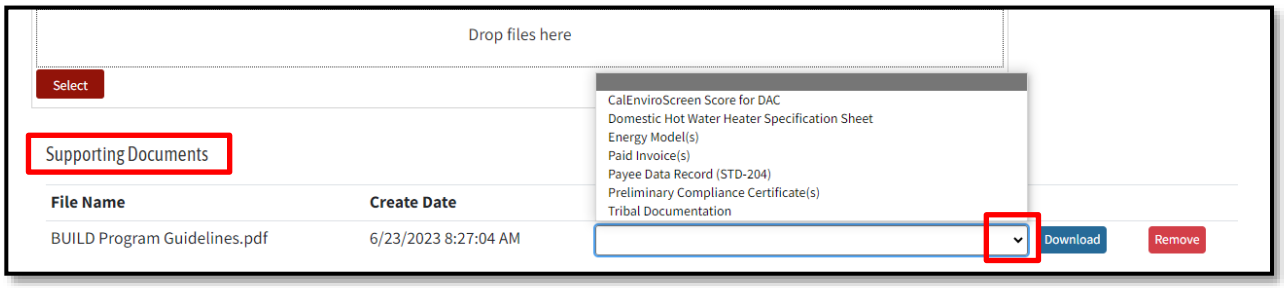
The Supporting Documents header allows uploads of the remaining documentation required for application submission. The required documents for the application are listed under the instructions. When the documents are ready for upload, either drag and drop the files into the upload box or press the "Select" button and choose the file from the device.



After selecting a document for upload, the file name will appear below the drop box in a queue. From here either select the "Upload" button to add the document to the application, or the "Remove" button to cancel the upload and replace the file.



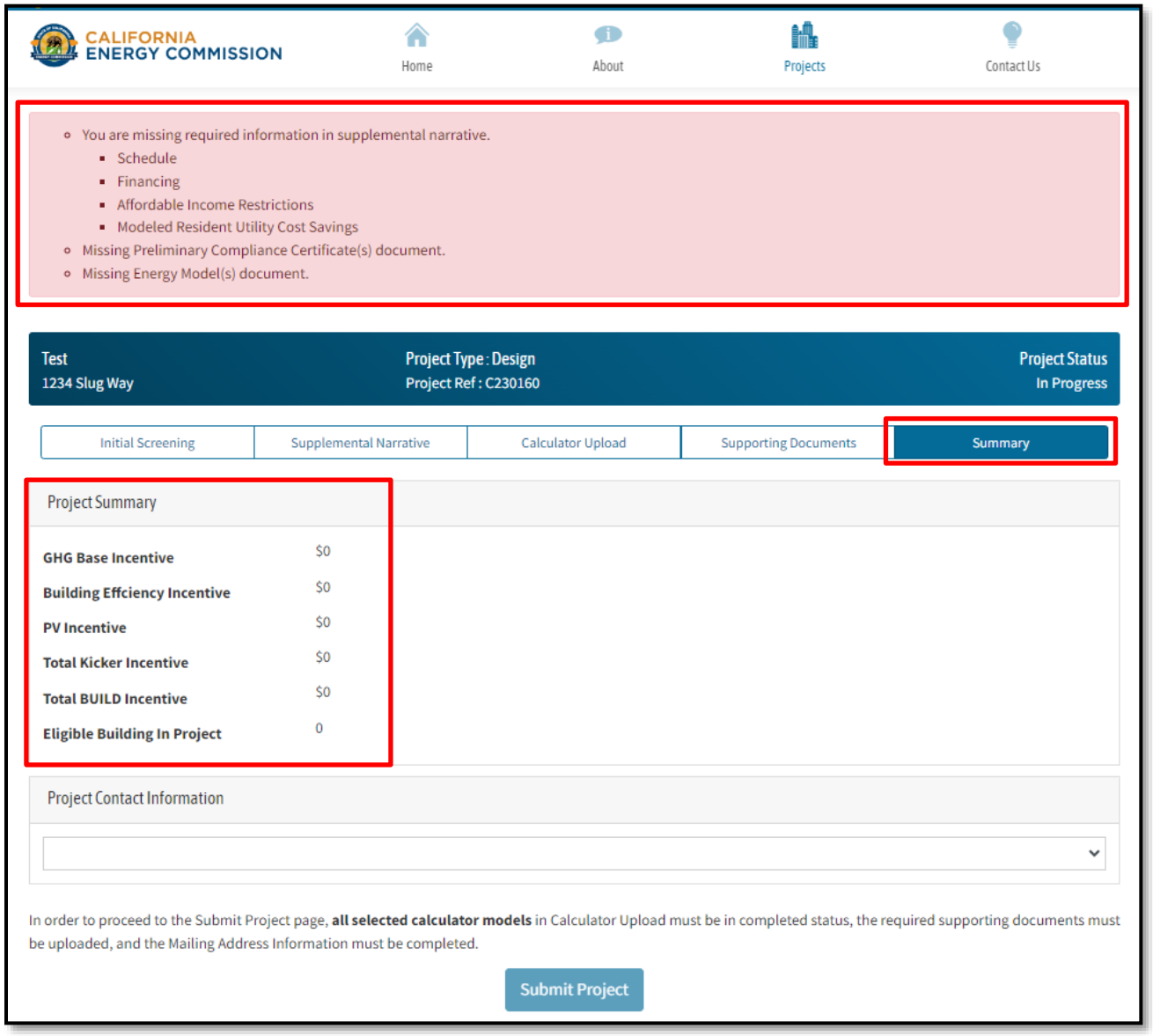
Successfully uploaded files will appear under "Supporting Documents" at the bottom of the page. Use the dropdown menu to select the document type for each uploaded file. Select the "Download" button to download a copy of the document, or the "Remove" button to remove the document from the application.



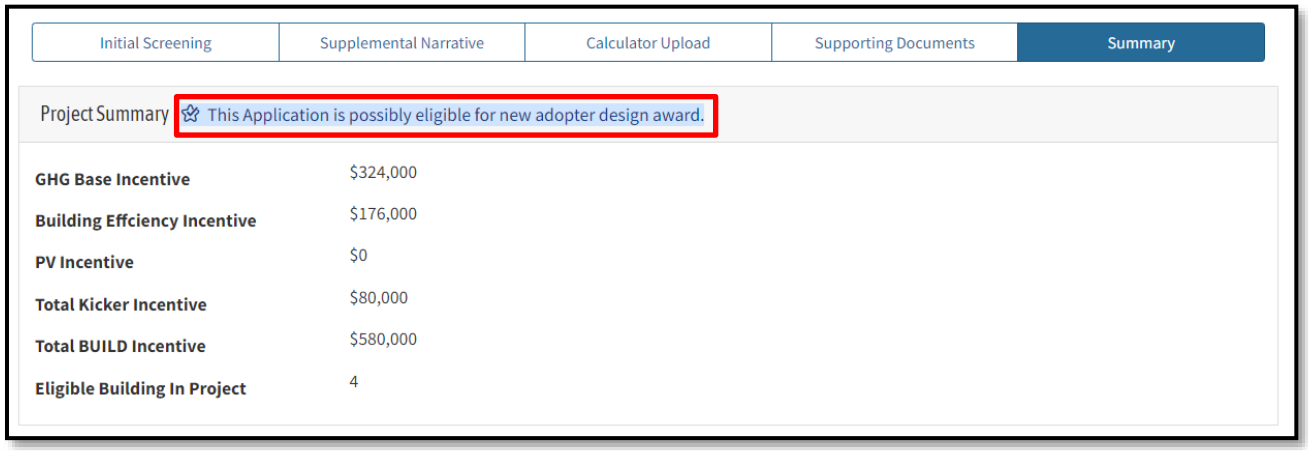
In preparation of submitting the application reference the checklists for Step 1: Design, Step 2: Construction, and Step 3: Completion for a list of documents to upload at each step. These checklists along with the fillable form Payee Data Record is available on the BUILD webpage's "Incentives" subpage by clicking the "More Information" tab, and opening the "Apply for an Incentive" accordion.

2.2.5. Summary and Application Submission

The Summary tab provides the estimated incentive values based on the calculator upload(s). The Summary tab also lists any missing documentation at the top of the page that is still needed to submit the application.

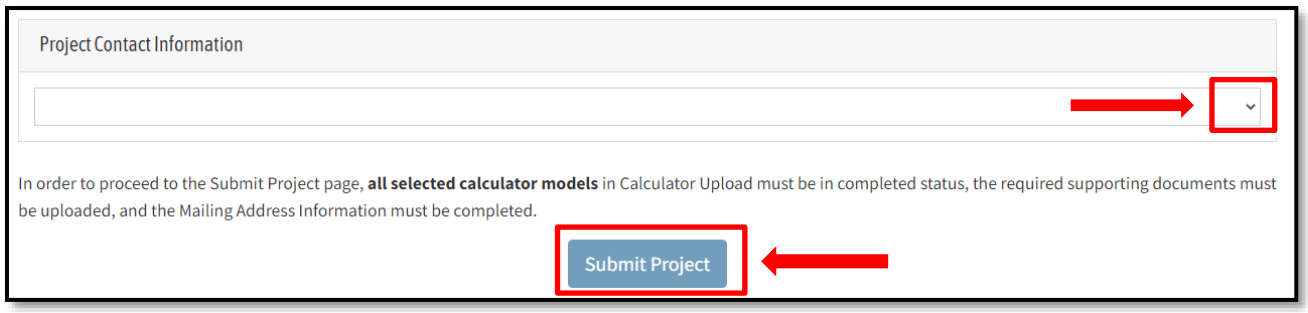


If the project is eligible for the New Adopter Design Award it will be noted on the Summary tab as shown below.



NOTE: If there are any technical issues while filling out the form or uploading documents, please contact BUILD@energy.ca.gov for assistance.

When ready to submit the application, use the dropdown menu under the "Project Contact Information" to select the appropriate company for future project communications. Finally, select the "Submit Project" button to complete the application submission.



Submission Confirmation Email: After a successful submission, the designated project contact will receive a confirmation email from the CEC with a BUILD Case ID, date and time of the submission, and the estimated incentive amount requested. View the status of the applications in the BUILD Online Project Dashboard.

Eligible applicants will be notified if applications are incomplete and given ten (10) business days to update their applications. Complete applications requiring corrections must be updated within 30 calendar days. Applications not corrected within 30 days become incomplete and will be cancelled.

NOTE: Once submitted, the application will be in queue, in the order received, for review, approval, corrections, or denial. The submitted application will not be available for modification until it has been reviewed and the status changed to corrections by

BUILD staff. During the application review process, BUILD staff my request additional documentation from eligible applicants to complete the approval process.

2.2.6. Incentive Details

BUILD incentives are based on a project's modeled anticipated greenhouse gas (GHG) emission reduction as compared to the mixed-fuel prescriptive standards in the 2019 Energy Code or the 2022 Energy Code. In addition, projects receiving BUILD incentives cannot result in higher utility bills for building residents than they would experience from a similar mixed-fuel home.

2.3 Application Updates and Notifications

BUILD Online functionality is under development. Visit the BUILD Webpage to sign-up for the program subscription list to be notified of program updates, including updates on BUILD calculators and BUILD Online.

If project information needs updating before an application is scheduled to transition to the next BUILD application step, please send an email to BUILD@energy.ca.gov to request support and instructions.

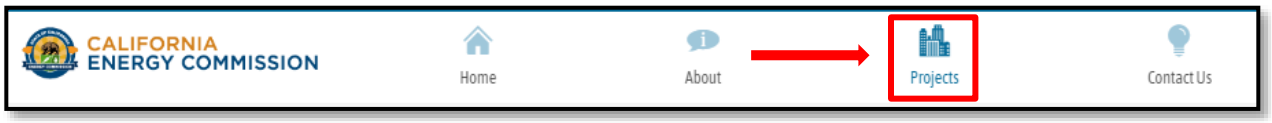
Withdrawal or Cancelation: To cancel or withdrawal an application, please notify BUILD staff by sending an email to BUILD@energy.ca.gov. Once received and processed, applicant will receive a project status notification confirming the withdrawal or cancelation of the application.

2.4 Project Step Transitions

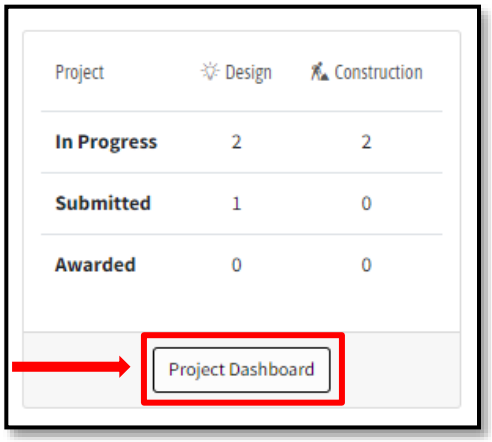
Once the application is approved, it is eligible to progress to the next step of the BUILD Program. The eligibility and required documentation to proceed to the next step is listed in the project's transition page in BUILD Online, which will be highlighted later in this section.

Note: The Step 3: Completion application is only available to applications approved for Construction reservations.

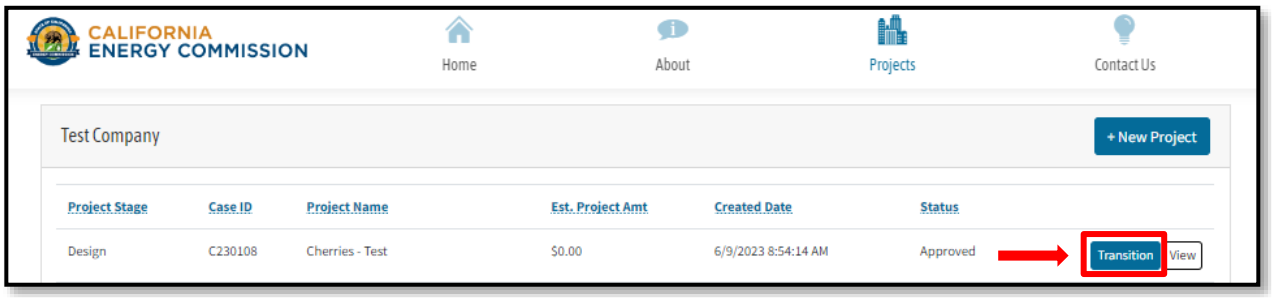
Navigate to the company's dashboard by selecting the "Projects" button at the top of BUILD Online.



Select "Project Dashboard" to populate all projects associated with the company.



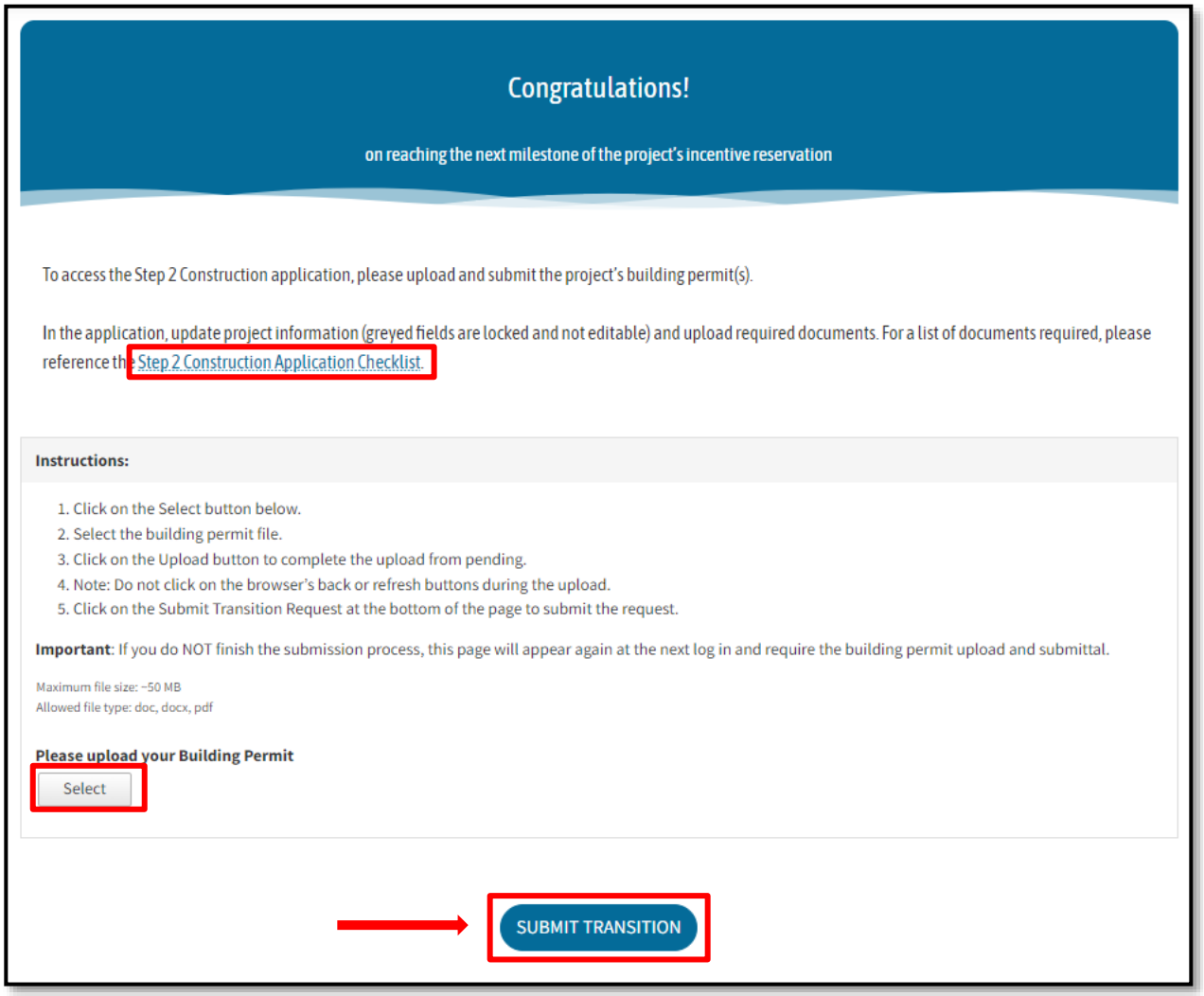
From the Project Dashboard, all approved applications will have a "Transition" button, shown below. Select the "Transition" button to expand the project's transition eligibility and required documentation.



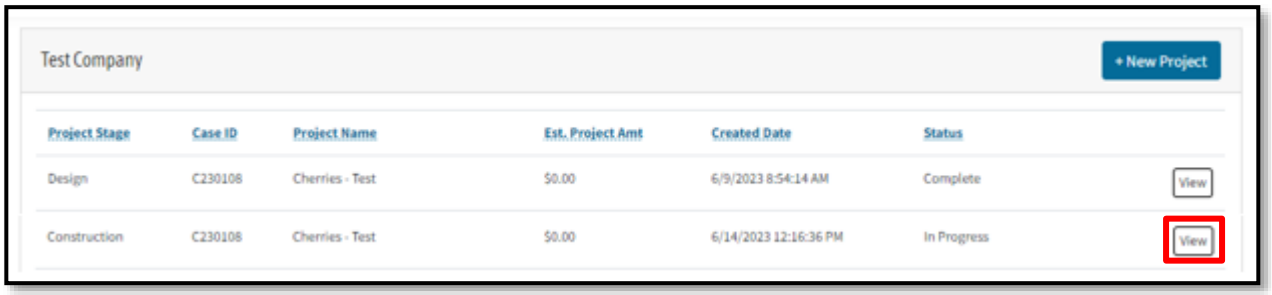
The transition application page provides links to the application checklist for the next applicable step, as well as instructions and important notices. The "Transition" button allows the applicant to upload the required document(s) for the next step. Review the next step's application checklist and instructions and upload the required documentation.

Note: To transition from an approved Step 1: Design application to a Step 2: Construction application, uploading the building permit(s) is required. To transition from an approved Step 2: Construction application to a Step 3: Completion application, uploading the temporary or final certificate of occupancy is required.

Once the document(s) has been uploaded, select the "Submit Transition" button at the bottom of the page.



Navigate back to the Project Dashboard to verify a new step application was created by the system. Select the new step application by selecting "View" shown below.

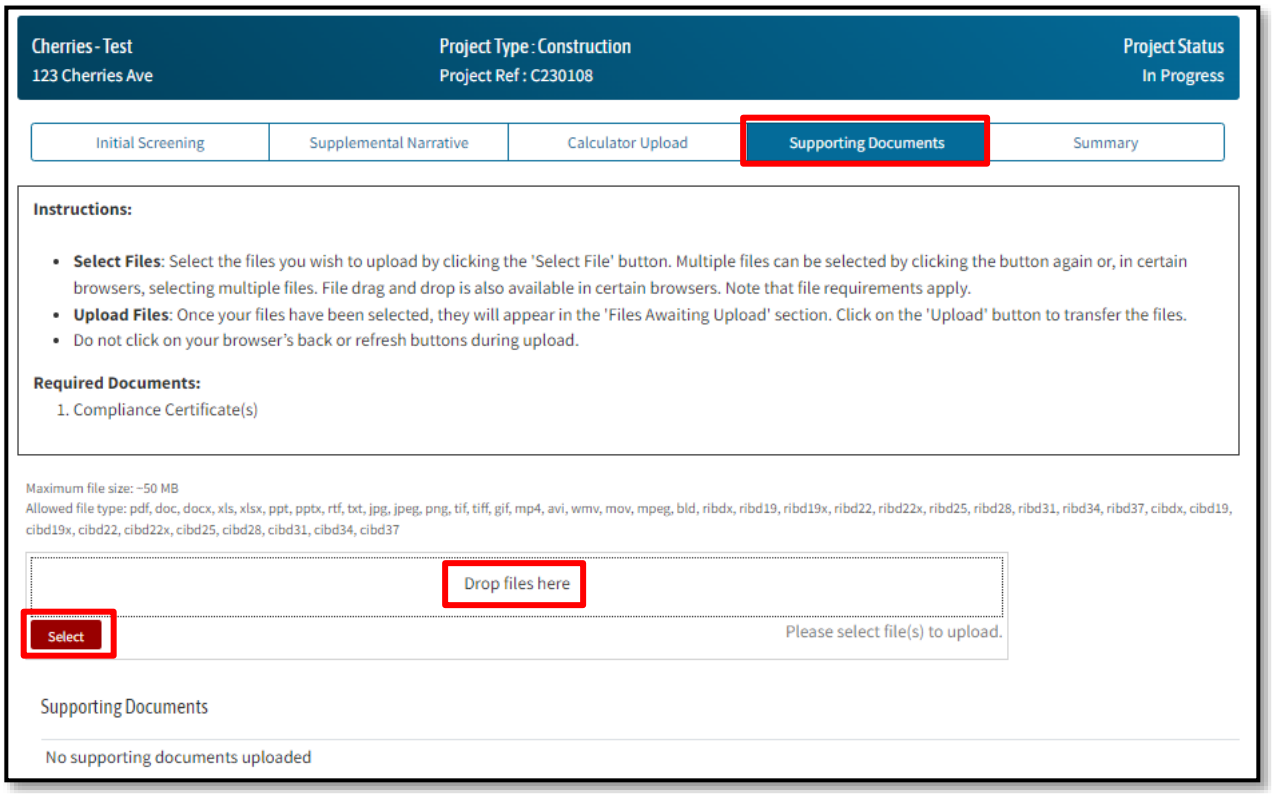


Once in the application, review the material and ensure all items are up to date and reflect the project's current status. As with the Step 1: Design application, all required items are in red while optional items are in black. Please ensure all items in red have

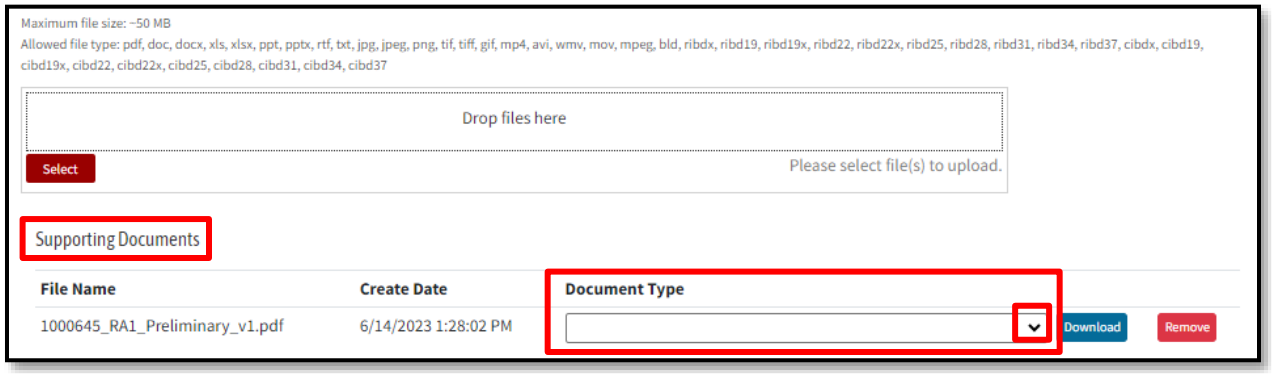
been updated and are consistent throughout the application.

Once reviewed, additional supporting documentation can be uploaded. Select "Supporting Documents" to upload the additional documentation required for the new step. These are found on the Supporting Documents page and on the step's application checklist.

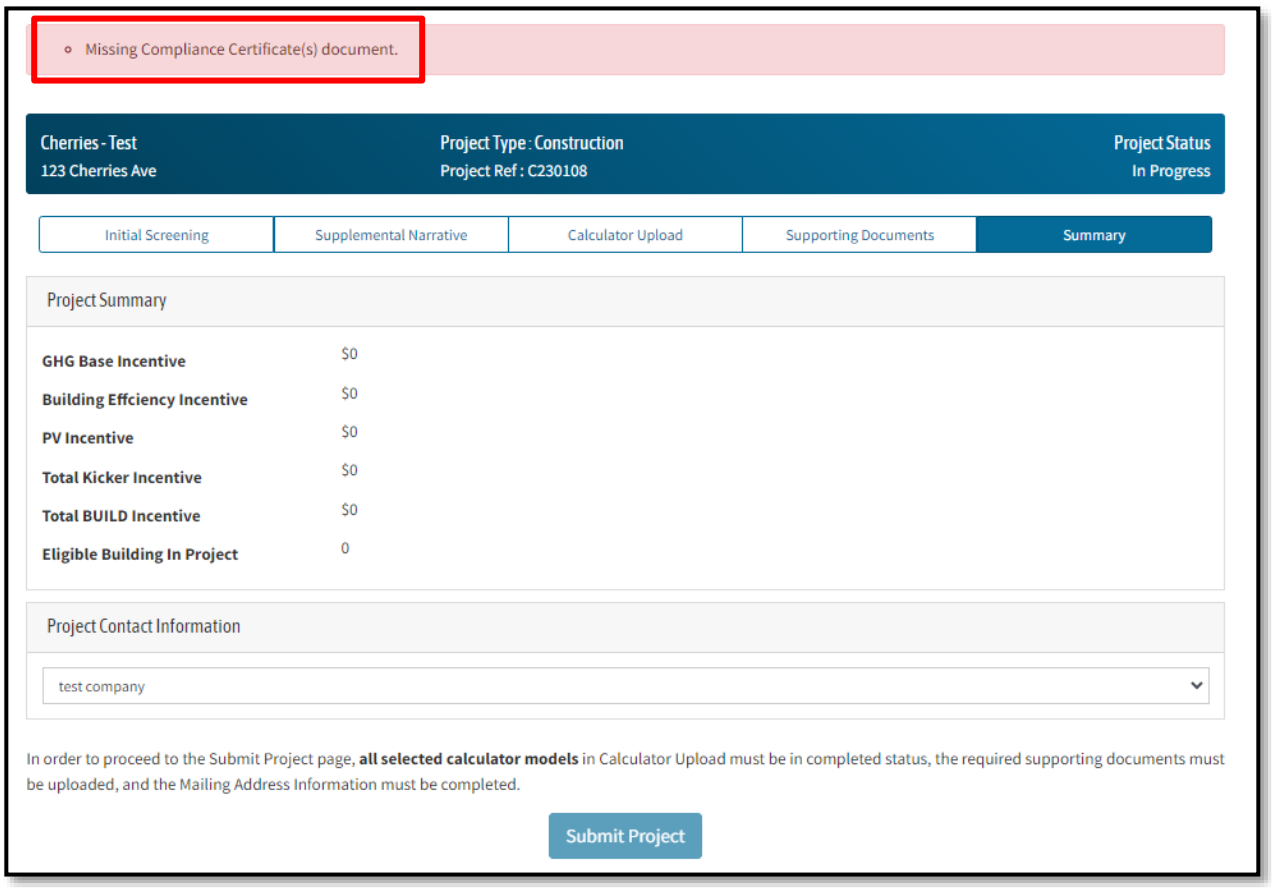
Documents can be located on the device and uploaded by clicking "Select," or documents can be dragged and dropped into the box noted with "Drop files here" highlighted below.



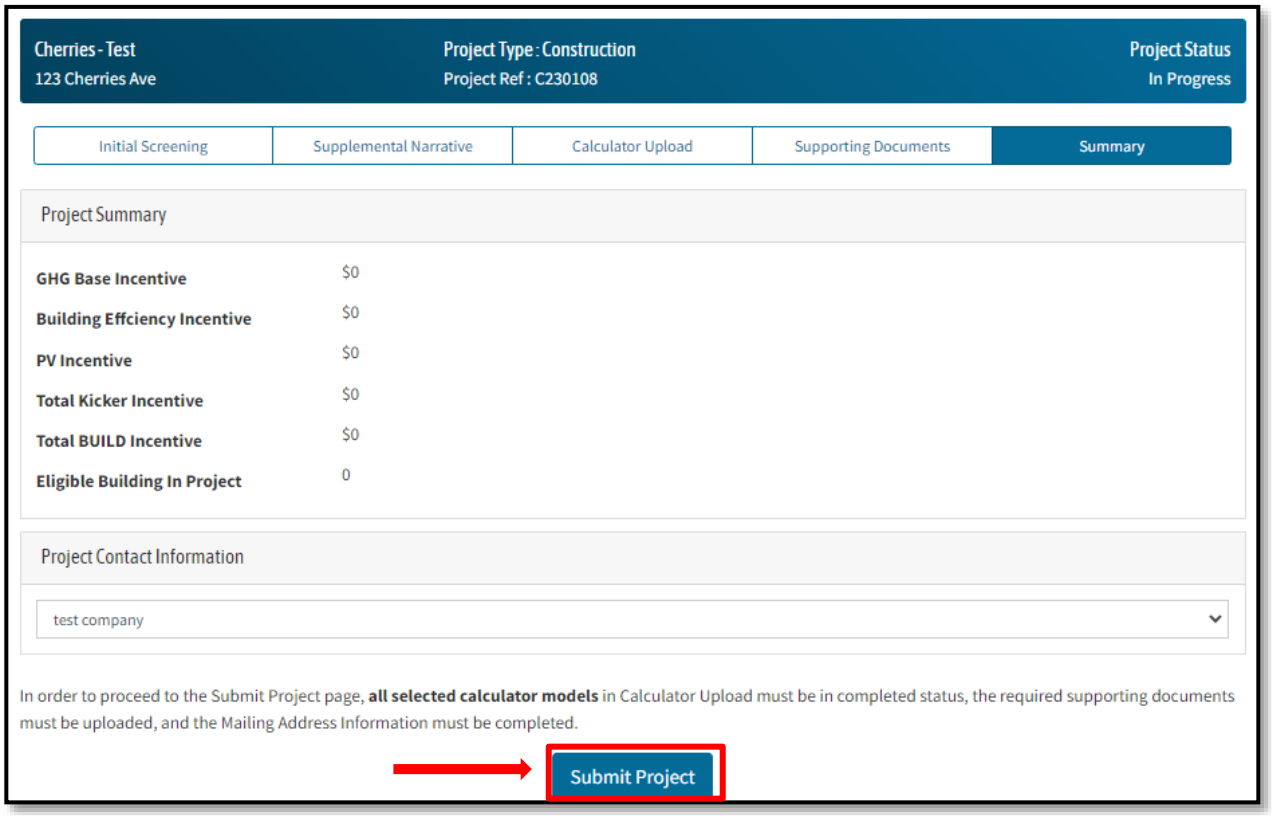
Once documentation is selected and successfully uploaded to the application, the document will appear at the bottom of the page under "Supporting Documents." Please declare the document type under "Document Type" by selecting the file type in the dropdown menu shown below.



Once all supporting documents are uploaded and labeled accordingly, proceed to the Summary tab to review the Project Summary. This can be done by selecting "Summary" in the application header. If any required information is missing, the items will be called out at the top of the page in red, shown below.



If all information in the Project Summary is correct and no additional information is needed, the application is ready for submission. Select "Submit Project" to submit the updated application.


Cherries - Test
123 Cherries Ave
Project Type : Construction
Project Ref : C230108
Project Status
In Progress
Initial Screening
Supplemental Narrative
Calculator Upload
Supporting Documents
Summary
Project Summary
GHG Base Incentive $0
Building Effciency Incentive $0
PV Incentive $0
Total Kicker Incentive $0
Total BUILD Incentive $0
Eligible Building In Project 0
Project Contact Information
test company
In order to proceed to the Submit Project page, all selected calculator models in Calculator Upload must be in completed status, the required supporting documents must be uploaded, and the Mailing Address Information must be completed.
Submit Project

3. BUILD Online Claims Submission

The incentive claims functionality for the BUILD Online system is currently under development. In the interim, to request:

- Step 1 New Adopter
- Step 2 Progress Payments
- Step 3 Lump or Final incentive payouts

Please send an email request to BUILD@energy.ca.gov and a claims package and further instructions for submittal will be provided.