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 Online Incentive Reservation Application System (BUILD Online) accepts incentive reservation applications through the CEC Data Submission Portal, a secure online application submission portal and

These BUILD Online instructions provide information on registering for a BUILD account, completing and submitting an incentive application for a design or construction reservation, and if applicable, a new adopter design award. The instructions are intended to be a helpful tool when preparing for and completing a BUILD incentive application. To accelerate program launch, the BUILD Program is providing an application tool through an early release of the CEC Data Submission portal that is still under development. Additional functionality will be added over time to BUILD Online.

For complete details on program eligibility, incentives, required documentation downloadable forms, and the terms and conditions of program participation, please consult the BUILD webpage for access to the BUILD Program Guidelines and additional incentive information.

All potential applicants are encouraged to request technical assistance for support in submitting incentive applications and in their project design. To request technical assistance please contact the BUILD Technical Assistance Provider, the Association for Energy Affordability, at BUILD@aea.us.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 log-in instructions for accessing the BUILD Online form through the CEC Data Submission Portal.

Register for a BUILD account in the CEC Data Submission Portal at https://datasubmission.energy.ca.gov/, and click “SIGN UP FOR AN ACCOUNT”

The applicant must enter contact information and create a password on the register page. Once all the fields are complete, click “Register” to submit the registration form.
Once submitted, the applicant must confirm their account. The system generates an email including a six-digit confirmation code to the registrant. Retrieve the six-digit confirmation code and enter it into the “Code” field and click “Confirm Account”.

![Confirm Account]

You've been emailed a six digit code! Enter it here to confirm your new account.

Code

Confirm Account
On the Log In page, enter the email address and password and click “Log in”.

**NOTE:** Please bookmark this Log In page for future reference in the incentive reservation process.
2. BUILD Online Application Submission

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

1. Applicant and Project Information
2. Eligibility Requirements
3. Incentive Details
4. Document Checklist (Required Attachments)
5. Submission

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 reservation types include:

1. **Design Reservation:** A design reservation is optional, used for projects still in a planning or design stage and without a building permit.
2. **Construction Reservation:** Construction reservations are for projects that have received a building permit but not a temporary or final certificate of occupancy.
3. **New Adopter Design Award:** At the time of 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 expenses, according to the allocations of the gas companies’ contribution, until the total $2 million program fund for this award is exhausted.
2.2 BUILD Incentive Application
Once logged-into the CEC Data Submission Portal, click “BUILD” to access BUILD Online and begin an incentive reservation application.
Click on “Reservation Application Form” to access a new reservation form.
2.2.1. Applicant and Project Information
Please indicate how the applicant learned about the BUILD Program and enter the project name associated with the incentive reservation.
Technical Assistance and BUILD Case ID: If the applicant is approved for technical assistance on this project and assigned a BUILD Case ID from the Technical Assistance Provider (TAP), check the box, and 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).
Fill-in the applicant’s name and title, company name and legal structure, email, phone number, and project address. Select the climate zone where the project is located. Please check the box if the project is located in a tribal community.

For assistance with identifying the climate zone, visit California Climate Zones.

2.2.2. Program Eligibility
Information selected in this section will confirm the project’s eligibility for BUILD incentives. Eligibility requirements include the project’s location in a participating gas territory, the developers’ low-income housing development and construction experience, and the project’s building specifications.

**NOTE:** Responses to the building type, structure and number of units fields will trigger additional fields pertaining to the new adopter design award.

**Gas Utility Service Territory:** Pursuant to BUILD Guidelines, program spending must be proportionally directed to the gas corporation service territories where the program funds are derived. Therefore to qualify for a BUILD incentive the project must be located in one of four gas utility service areas.
As depicted below please choose one of the four gas utilities 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.

Please type in the electric utility provider associated with the project address.
**Applicant’s Low-Income Housing Development Experience in California:** The BUILD Guidelines require an eligible applicant must have five years of housing development experience and must have developed and received a certificate of occupancy for at least one low-income deed-restricted multifamily residential property in California, or at least one low-income single-family residence.

The applicant must also submit additional information regarding their experience in the BUILD attestation form.

**All-Electric:** Check the box to confirm the anticipated project is all-electric without gas distribution lines installed.
Building Type: Select the residential building type from one of the available options on the drop-down menu.

Please select whether the home is a single family or multifamily with the number of stories from the available options on the drop-down menu, and enter the project’s anticipated number of units, bedrooms, total conditioned floor area, and number of stories above grade.
Building Type Eligibility: Select one of the options. If the building type is not listed, the project is ineligible at this time.

Low-Income Eligibility: To qualify for a BUILD incentive the project must meet requirements for low-income residential housing income limits. Choose one of the following options depicted in the figure below.

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.
Anticipated Affordable Multifamily Housing Financing Source: 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 drop-down menu. For low-income single family residences, select Not Applicable. In addition, the applicant is required to complete an Initial or Revised BUILD Supplemental Application Narrative and email the completed form to BUILD@energy.ca.gov.

Anticipated Application Date for Affordable Housing Financing Source: The BUILD Program Guidelines require funding details, including the anticipated date for applying to a financing source. As depicted below, please 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.

Demonstrating Construction and Permanent Financing Commitments: For a construction incentive applicant, the BUILD Guidelines require letters or similar resolutions evidencing the commitment of construction and permanent financing. These documents must be combined into a single pdf and provided using the “Evidence of Affordable Housing Financing Source Approval” upload option.
Other Programs (Federal, State, Local, Utilities) Anticipated to Use: If applicable, enter the names of other funding, incentive, or rebate programs anticipated to contribute funds to the project.

![Image of Other Participating Programs](image)

Anticipated Number of Units with Income Restriction and Anticipated Restricted Affordability Level (%AMI): The BUILD Program Guidelines require details on the anticipated number of units, income restrictions and the anticipated affordability level based on the area medium income (AMI) for multifamily buildings. As depicted below, insert number of units and their corresponding restricted percentage of AMI. Rows can be added or removed as necessary to present complete project information on income restrictions and affordability levels.

![Image of Anticipated Number of Units](image)

2.2.3. Incentive Details
BUILD incentives are based on a project’s anticipated modeled greenhouse gas (GHG) emission reduction as compared to the mixed-fuel 2019 Energy Code prescriptive standards. 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. To meet the BUILD Program requirements an applicant may use the BUILD Calculator tool early in the design reservation stage to estimate the incentive amounts available and ensure project designs meet the modeled resident bill savings requirements. Access to the calculators and instructions for using them are located on the BUILD webpage’s “Incentives” subpage by clicking the “More Information” tab.
**Total Estimated Project Cost and Estimated BUILD Incentive Amount:** Enter the total estimated project cost. Enter the estimated incentive amount from the BUILD Incentive Calculator or a Custom Energy Model output.

![Total Estimated Project Cost and Estimated BUILD Incentive Amount](image)

**Project Construction Stage and Building Permit Status:** If the project has received a building permit, please indicate by selecting it as an option from the drop-down menu. If the project has not received a building permit yet, the project is eligible for a design reservation, and possibly the new adoper design award. If the project has received a building permit, the project is eligible for a construction reservation.
New Adopter Design Award: If the applicant is applying for this award it must check the New Adopter Design Award box. If the application is approved for a design reservation, BUILD staff will provide the applicant with additional documentation to complete.

NOTE: An applicant applying for the New Adopter Design Award must provide paid invoices pertaining to architectural, engineering, energy consultation, or other eligible design-build services. These documents must be combined into a single pdf and provided using the “Paid Invoices for Eligible Design Costs” upload option below.
2.2.4. Document Upload Checklist

Once the reservation application form is complete, the document upload checklist will display the documents required based on the project information provided. To attach the required documents for the proposed project, click on “Browse” or “Choose File” button, locate and click on the document name, and click “Open” to upload the document in the appropriate file format (e.g., pdf, csv, etc.). If an incorrect document is uploaded, it can be replaced by repeating the upload process.

**NOTE**: If technical difficulties occur due to a document upload failure, the applicant can still preserve and submit their application by uploading a “placeholder” document and completing the submission. The applicant should then report the technical difficulty to BUILD staff at BUILD@energy.ca.gov, who will assist with replacing the placeholder document. Applications submitted with placeholder documents are not considered complete under the Program guidelines; once an application is returned by BUILD staff for uploaded corrections, the applicant will have ten (10) working days to make corrections and complete the upload process.

Consult the checklist table for the documents required for each incentive reservation or award. Fillable forms, such as the Attestations, the Supplemental Application Narrative, and the Payee Data Record, are available on the BUILD webpage’s “Incentives” subpage by clicking the “More Information” tab, and opening the “Apply for an Incentive” accordion.
### Document Checklist of Available and Under Development Application Forms

<table>
<thead>
<tr>
<th>DESIGN APPLICATION</th>
<th>NEW ADOPTER DESIGN AWARD (WITH DESIGN APP)</th>
<th>CONSTRUCTION APPLICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attestations (.pdf) <em>(on BUILD website)</em></td>
<td>Attestations (.pdf) <em>(on BUILD website)</em></td>
<td>Attestations (.pdf) <em>(on BUILD website)</em></td>
</tr>
<tr>
<td>Preliminary CF1R-PRF-01E or NRCC-PRF-01-E (.pdf) <em>(provided by applicant)</em></td>
<td>Included w/ Design Reservation</td>
<td>CF1R-PRF-01E or NRCC-PRF-01-E (.pdf) <em>(provided by applicant)</em></td>
</tr>
<tr>
<td>Payee Data Record (STD-204) (.pdf) <em>(on BUILD website)</em></td>
<td>Same as Above</td>
<td>Payee Data Record (STD-204) (.pdf) <em>(on BUILD website)</em></td>
</tr>
<tr>
<td>CalEnviroScreen Score for DAC (.jpeg, .pdf, .png) <em>(provided by applicant)</em></td>
<td>Same as Above</td>
<td>CalEnviroScreen Score for DAC (.jpeg, .pdf, .png) <em>(provided by applicant)</em></td>
</tr>
<tr>
<td>BUILD Incentive Calculator or Custom Energy Model Output (.exe, .csv, .xlsm) <em>(on BUILD website)</em></td>
<td>Same as Above</td>
<td>Custom Energy Model Output (.exe, .csv, .xlsm) <em>(on BUILD website)</em></td>
</tr>
<tr>
<td>Supplemental Application Narrative <em>(on BUILD website)</em></td>
<td>Same as Above</td>
<td>Supplemental Application Narrative <em>(on BUILD website)</em></td>
</tr>
<tr>
<td></td>
<td>Paid Invoices for Eligible Design Costs (.pdf)</td>
<td>Building Permit (.doc, .pdf) <em>(provided by applicant)</em></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Evidence of Affordable Housing Financing Source Approval (.pdf)</td>
</tr>
</tbody>
</table>
2.2.5. Application Submission

When the incentive application is complete, and all required documentation is uploaded, reviewed, and confirmed please click the disclaimer button. This action affirms the application submitted is accurate and final.

As previously noted, BUILD Online is still under development and not at full functionality. Certain required application information is not included in the BUILD Online system at this time. Documents developed to comply with BUILD Guidelines are located on the BUILD webpage’s “Incentives” subpage by clicking the “More Information” tab, and selecting the “Apply for an Incentive” accordion. Applicants must upload required documents or email them to BUILD@energy.ca.gov. Should questions arise, please contact the BUILD Technical Assistance Provider at BUILD@aea.us.org or BUILD staff BUILD@energy.ca.gov.

NOTE: Once the application is submitted to the BUILD Online system, the application receives a unique filename and is considered a final submittal for review, approval, corrections, or denial. Subsequent changes made by the applicant during the review process could delay incentive reservation application approval.

Submit the Application Package: Click the Submit button after final review of the form and document checklist.

NOTE: If there are any technical issues while filling out the form or uploading documents, please contact BUILD@energy.ca.gov for assistance.
Submission Confirmation Email: After a successful submission, applicant will receive a confirmation email from the CEC with a BUILD Case ID, date and time of the submission, and a summary table for the project, including the estimated incentive amount requested.

BUILD staff will review applications in the order received. Eligible applicants will be notified if applications are incomplete or contain errors and will have ten (10) business days to update their application.

Additional Documents Request: During the application review process, eligible applicants will be requested by BUILD staff to submit additional documentation to complete the approval process. The email will list the documents required and where they can be downloaded for completion.

2.3 Application Updates and Notifications
BUILD Online functionality is under development to notify an applicant of incentive application timelines and assist BUILD staff or an applicant with increasing or decreasing an incentive estimate, including the uploading of revised calculator outputs and other required documentation.

To update project information in an existing application, send an email to BUILD@energy.ca.gov to request support and instructions.

Withdrawal: 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 of the application.