



BUILD

Building Initiative for Low-Emissions Development Program



STEP 3: BUILD PROJECT COMPLETION APPLICATION CHECKLIST

Required for ALL application submittals:

- Provide copies of Temporary¹ or Final Certificate of Occupancy (.doc, .pdf)**
- Provide a copy of the Recorded Deed Restriction (MF)/Resale or Equity Sharing Agreement (SF) (.doc, .pdf)**
 - Recorded deed restriction or regulatory agreement demonstrating corresponding number of low-income units and bedrooms, or an executed resale restriction or equity-sharing agreement that has been filed with the local county recorder for the property being funded.
- Provide Installation and Verification Compliance Certificates Completed by Installers and HERS Raters (.pdf)**

Note: All required Certificates of Installation and Verification forms are indicated in the project's Title 24 Certificate of Compliance

 - Single Family: CF2Rs and CF3Rs completed in HERS Registry
 - Low-Rise Multifamily: completed in HERS Registry
 - 2019 Code: CF2Rs and CF3Rs
 - 2022 Code: LMCIs and LMCVs
 - Mid-Rise and High-Rise Multifamily: NRCIs and NRCVs completed manually
 - All Codes: [2022 Compliance Forms | California Energy Commission](#)
- Complete Attestation**
 - This portion of the application is to confirm applicant developed an eligible project and complied with all Program Guidelines.
- List of Premise, Service Point & Meter IDs (.doc, .pdf)**
 - A listing of the Premise ID, Service Point ID, and Meter IDs of the common areas and residential units of the project as provided by the site's electricity provider.
- Program Completion Survey**
 - Survey link to be provided in Step 3 Project Completion claims process.
- Provide Final Energy Model(s) (ribd. or BLD. file)**
 - Model(s) must demonstrate compliance with all program requirements and be created by a certified energy analyst (CEA).
- Provide Final Compliance Certificate(s): CF1R-PRF-01E or NRCC-PRF-01-E**
 - Based on final energy model.
- Provide Final Custom Path Tool(s)**
 - Recalculate incentive values based on final energy model.

¹ A temporary certificate of occupancy will only be accepted at Step 3 if the unfinished portion of the project does not include any of the residential portion of the project or any portion of the project associated with a kicker incentive.

If building design modifications triggered a Title 24 documentation amendment after the Step 2 Construction application approval:

Provide Description of Design Modifications

- Description of modifications and any increase or decrease of incentive amount.

If the project includes incremental PV²:

PV PTO (Permission to Operate) Bundle (Any installed system must be interconnected before construction reservation expiration date) including (.doc, .pdf):

- Interconnection application
- System line diagram
- Copy of final building permit

If the residents pay the utility bills:

Provide a copy of the VNEM Agreement assigning PV to residents (.doc, .pdf) OR

Demonstration of the individual meters OR

Proof of measure installation & legal covenants assigning PV to the residents (.doc, .pdf)

Alternatively, if the residents do not pay the utility bills:

Provide a copy of the deed restriction or a similar legal agreement or covenant

Final or lump sum claims process:

Program Completion Survey

Complete Payee Data Record (STD-204) (.pdf)

- A Payee Data Record (STD-204) is needed to process payments of invoices.
- [Payee Data Record - STD-204 | California Energy Commission](#)

Step 3: Completion claim package (provided and processed through an interim encrypted email procedure) that includes proof of purchase and installation of eligible equipment & PV including kickers (.doc, .pdf):

- Price & total costs charged for installation or equipment
- Name, address, contractor's license
- Project site address
- Description of work performed
- Quantity, manufacturer, and specific model numbers of equipment installed

Note on Final Incentive Payout

The final incentive amount may:

- a) Increase if there were changes that improved building design and performance that cause further GHG reduction (if funds are available).
- or
- b) Decrease if there were changes in the project design that triggered a Title 24 documentation amendment after the Step 2 Construction application approval or equipment installed that impact

² Incremental PV is defined as additional PV installed beyond the applicable Energy Code if used to meet the program's utility cost savings requirement

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COMPLETION APPLICATION CHECKLIST

the incentive value. Any progress payments previously paid to the applicant will be assigned to the total final incentive value, so the applicant is not overpaid.