



# 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.*



# BUILD

Building Initiative for Low-Emissions Development Program

## INTRODUCTION

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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 and eligible expense information through the CEC’s secure online application and claims 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),
- Making modifications to a submitted application, and
- Submitting eligible expense information and incentive claims.

The instructions are a helpful tool when preparing for and completing a BUILD incentive application or submitting an expense claim. For complete details on program eligibility, incentives, required downloadable documentation requirements, and the terms and conditions of program participation, please consult the [BUILD Program Guidelines](#) and 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](mailto:BUILD@aeacleanenergy.org). For general program questions or other issues, please contact BUILD staff at [BUILD@energy.ca.gov](mailto:BUILD@energy.ca.gov).



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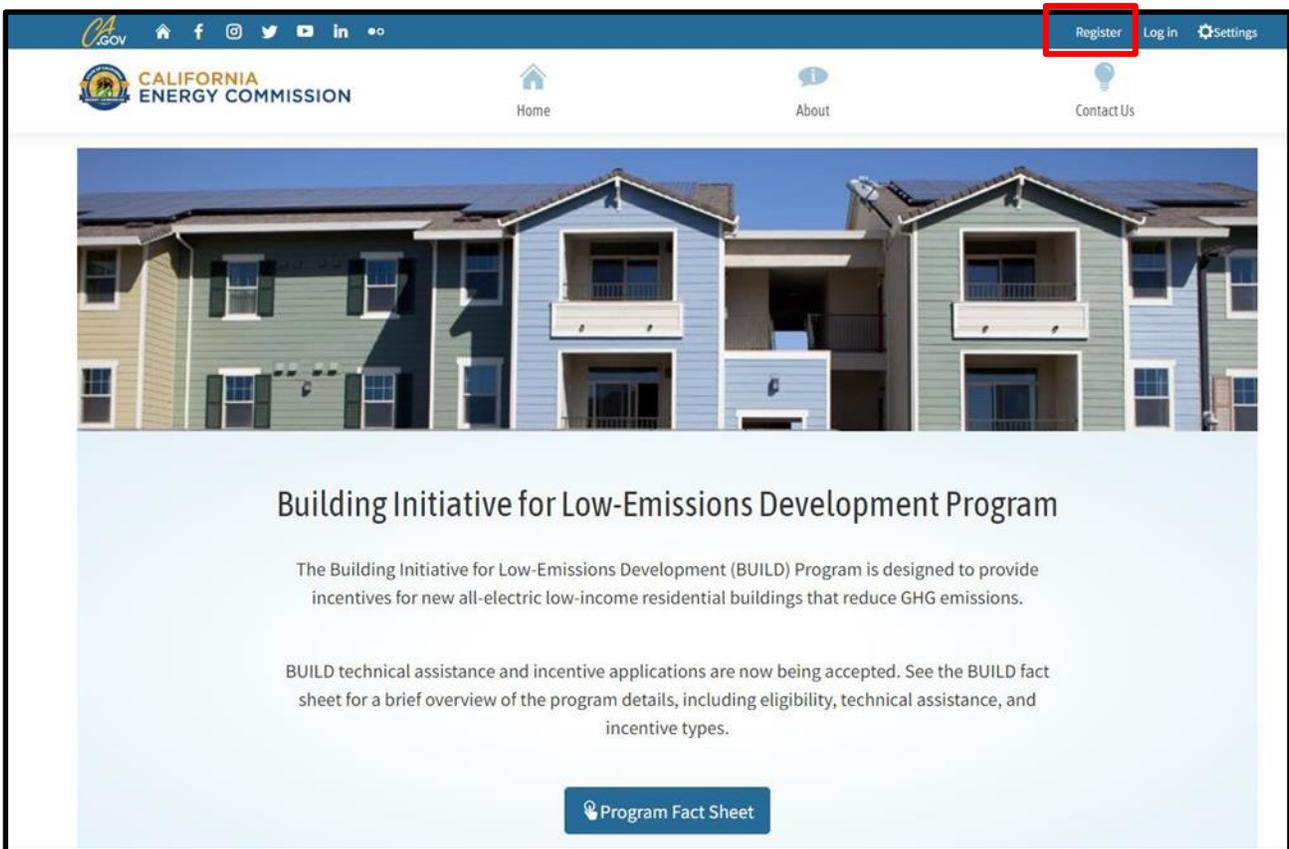
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## 1. BUILD Applicant Online Registration

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.

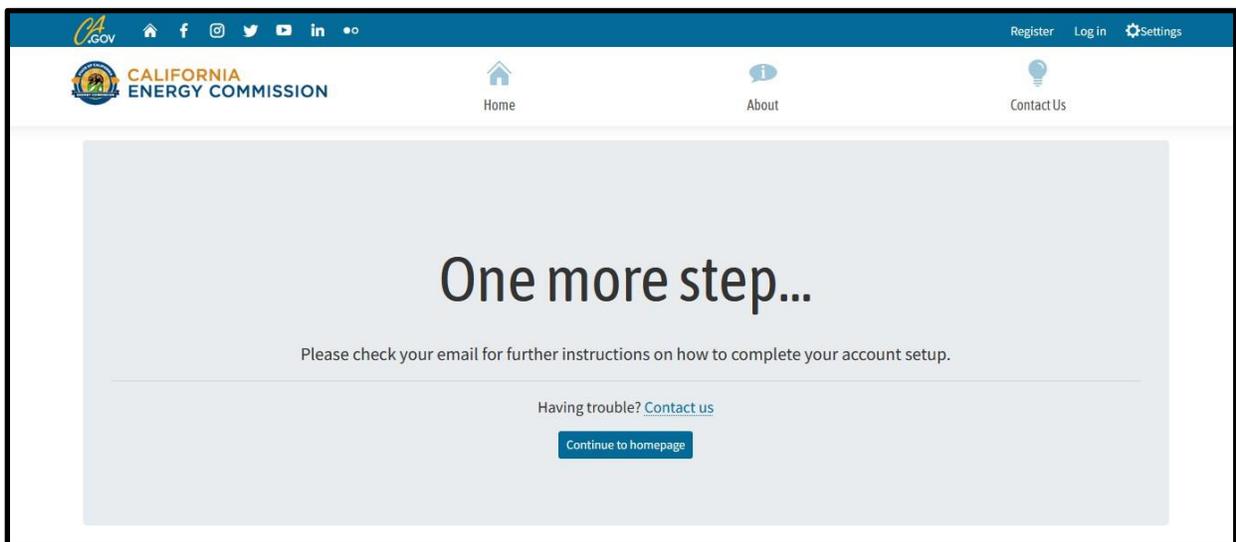


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The screenshot shows the registration page of the BUILD website. At the top, there is a navigation bar with the CA.GOV logo, social media icons, and links for Register, Log in, and Settings. Below this is a secondary navigation bar with the California Energy Commission logo and icons for Home, About, and Contact Us. The main content area is titled "Register." and contains a "Create a new account" section. This section includes several input fields: "First Name", "Last Name", "Job Title", "Phone Number", "Email", "Password", and "Confirm password". A red box highlights the "Register" button at the bottom left of the form.

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.

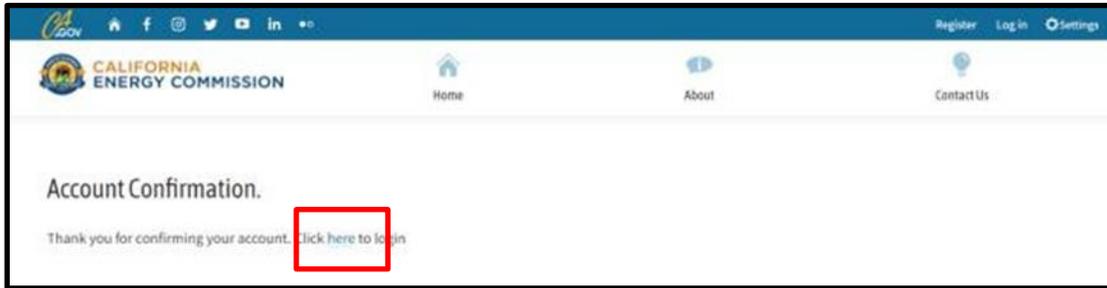




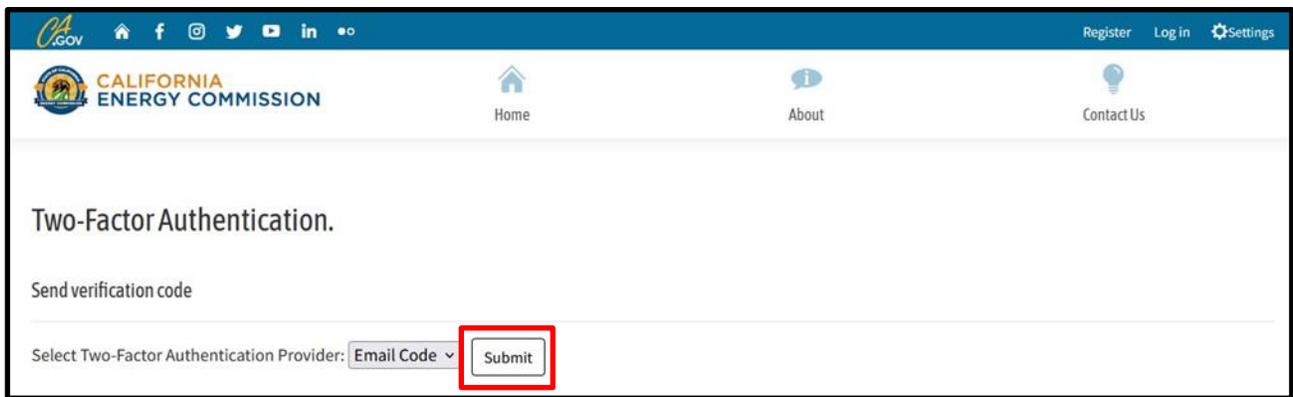
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Once the email verification is complete, click on "here" highlighted below.



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 and click Submit to login.



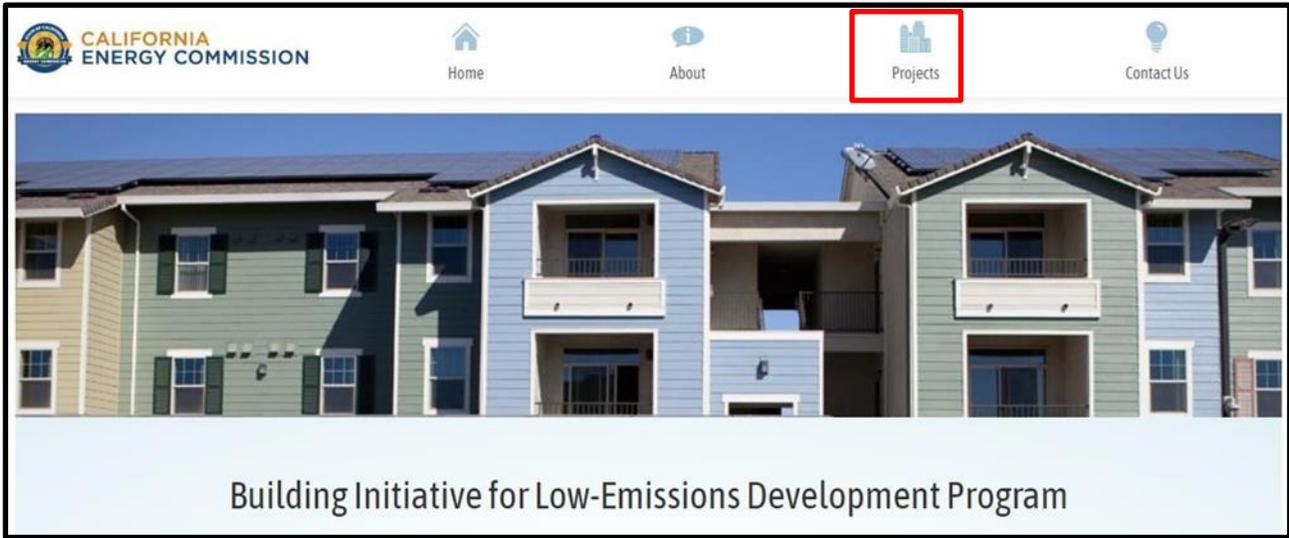


# BUILD

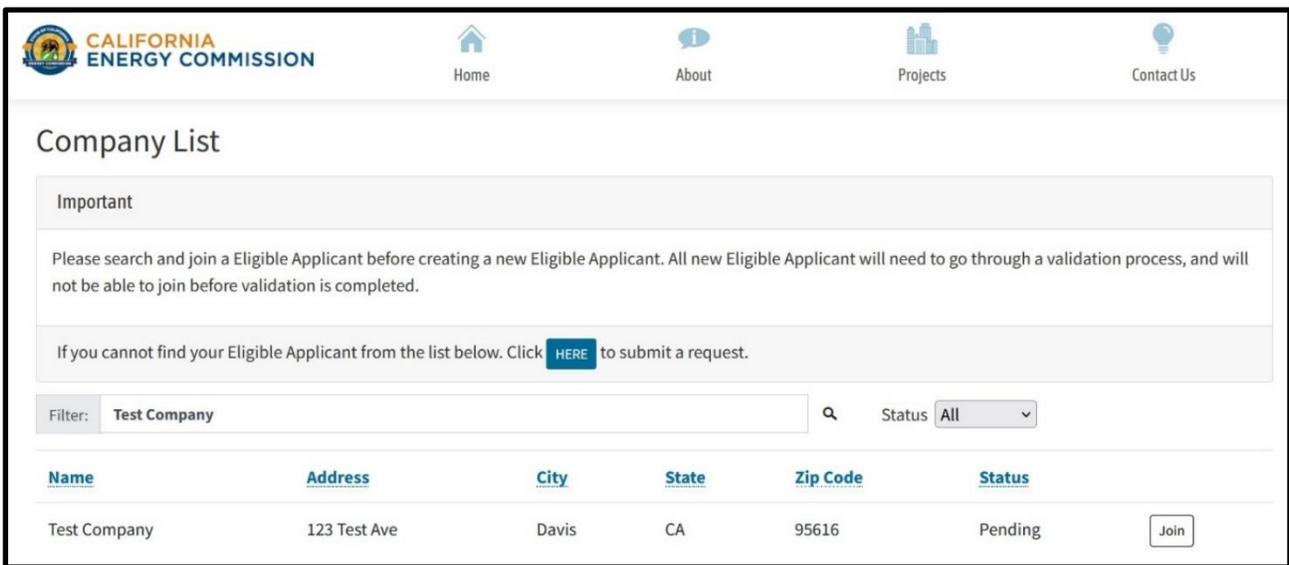
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## 1.2. Creating a Company

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.





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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. 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



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applicant, the profile page will then appear. Please note that Question #5 decides the company's eligibility for the New Adopter Design Award during the Step 1: Design reservation application.

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### Company Information (All fields are required)

Profile

**1. Company Name**

**2. Legal Structure**

**3. Business Type**

**4. Organization Type**

**5. TaxID (Must be 9 characters)**

**6. Address**

**7. State**

**8. County**

**9. City**

**10. Zip Code**

**11. Applicants Developer Experience. Describe at least five years of developer experience.**  
Type in your developer experience

0 / 1500

Previous Save

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



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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.

**Company List**

Important

Please search and join a Eligible Applicant before creating a new Eligible Applicant. All new Eligible Applicant will need to go through a validation process, and will not be able to join before validation is completed.

If you cannot find your Eligible Applicant from the list below. Click [HERE](#) to submit a request.

Filter:  Status:

Name	Address	City	State	Zip Code	Status	
Test Company	123 Test Ave	Davis	CA	95616	Pending	<input type="button" value="Join"/>

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

**Company List**

Please pick your role for the Eligible Applicant Test Company

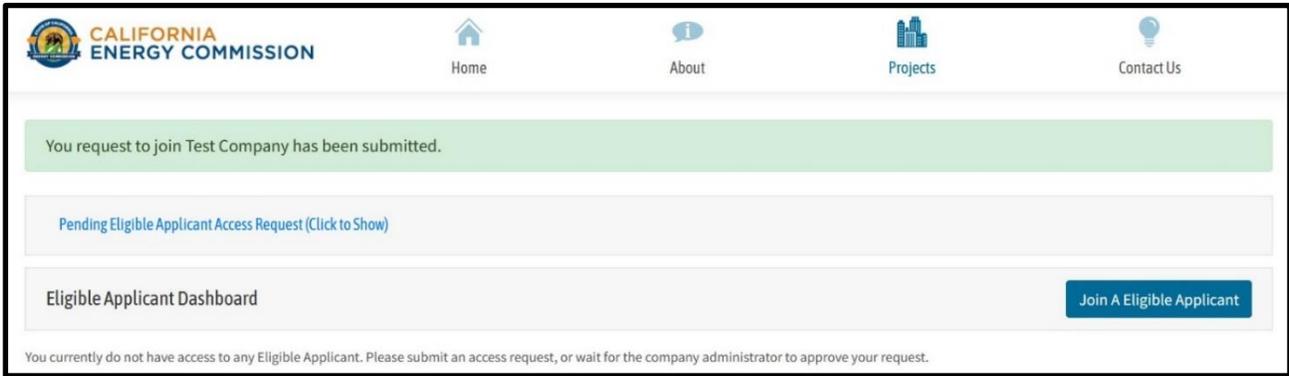
- Eligible Applicant Admin (Limit 3)**
  - ✓ View All Projects
  - ✓ Create Projects
  - ✓ Submit Projects
  - ✓ Manage Profile
  - ✓ Manage User List
  - ✗ Join Multiple Eligible Applicants
- Eligible Applicant Staff**
  - ✓ View All Projects
  - ✓ Create Projects
  - ✓ Submit Projects
  - ✗ Manage Profile
  - ✗ Manage User List
  - ✗ Join Multiple Eligible Applicants
- Eligible Applicant Consultant**
  - ✓ Join Multiple Eligible Applicants
  - ✓ Create Projects
  - ✓ Submit Projects
  - ✗ View Others Project
  - ✗ Manage Profile
  - ✗ Manage User List
- Eligible Applicant Assistant**
  - ✓ Join Multiple Eligible Applicants
  - ✗ View Others Project
  - ✗ Create Projects
  - ✗ Submit Projects
  - ✗ Manage Profile
  - ✗ Manage User List



# BUILD

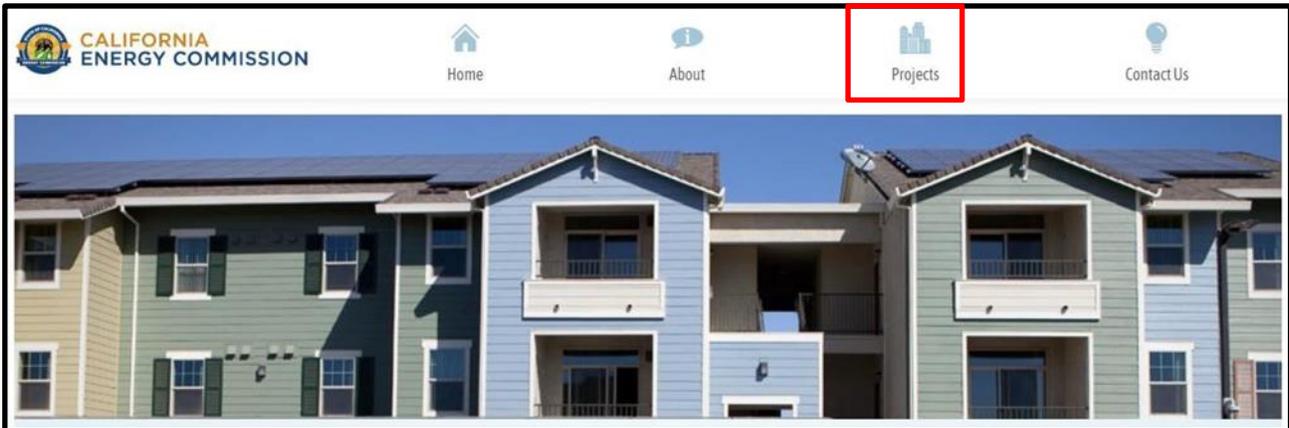
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The following will appear once a user role is selected and submitted.

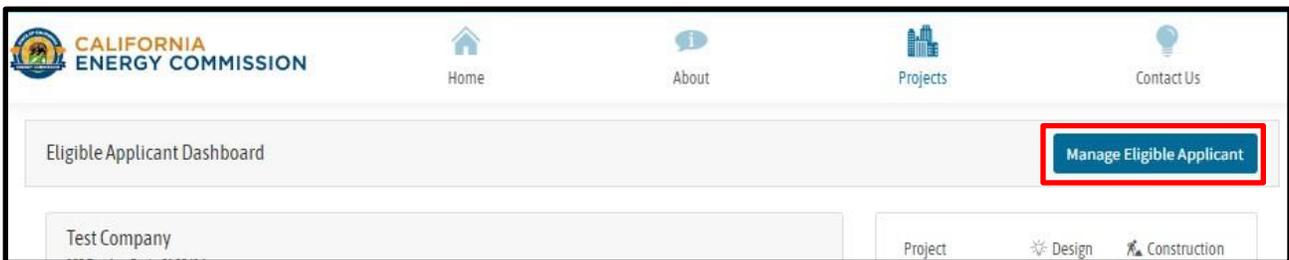


The first applicant to join a company will automatically become a "Company Admin" with the ability to approve additional users.

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.





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Under the Eligible Applicant Dashboard: Company, Sub Company, and User Access are all managed through this tab. Select User Access to find all company user information.

The screenshot shows the 'Eligible Applicant Dashboard' with a sidebar on the left containing 'Profile', 'Sub Company', and 'User Access' (highlighted with a red box). The main content area contains a form with the following fields:

- 1. Eligible Applicant Name: Test Company
- 2. Legal Structure: Test Company
- 3. Business Type: Developer
- 4. Organization Type: Private
- 5. Address: 123 Test Ave
- 6. State: California
- 7. County: Yolo
- 8. City: Davis
- 9. Zip Code: 95616

An 'Update' button is located at the bottom of the form.

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).

The screenshot shows the 'Eligible Applicant Dashboard' with a search bar labeled 'Filter: Enter a user name or user's email' (highlighted with a red box). Below the search bar is a table of users:

Name	Email	Title	Role	Status	
Calleagh Turn	calleagh.turner@gmail.com	Test Applicant 2.0	CompanyAdmin	Approved	<b>Approve</b> <b>Reject</b>
Dan Vermeulen	djvermeulen@sbcglobal.net	TEST Applicant	CompanyStaff	Approved	<b>Approve</b> <b>Reject</b>
Danny Vermeulen	danielvermeulen@berkeley.edu	TEST Applicant	Consultant	Pending	<b>Approve</b> <b>Reject</b>

The 'Approve' and 'Reject' buttons for each row are highlighted with a red box.



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## 1.4. Changing Applicant/Company Information

To change information of an existing applicant/company, such as name, legal structure, business type, address, etc., select Manage Eligible Applicant from the Eligible Applicant Dashboard.

The screenshot shows the 'Eligible Applicant Dashboard' for 'LAFHBUILDS'. At the top right, the 'Manage Eligible Applicant' button is highlighted with a red box. The dashboard includes a navigation bar with 'Home', 'About', 'Projects', and 'Contact Us'. Below the navigation bar, there are sections for applicant details, funding information, and a project status table.

Project	Design	Construction	Completion
<b>In Progress</b>	0	0	0
<b>Submitted</b>	0	1	0
<b>Completed</b>	1	0	0

Select Applicant Info and change and/or update any of the fields in the Profile. To save changes click Update.

The screenshot shows the 'Applicant Profile' form. The 'Update' button at the bottom left is highlighted with a red box. The form contains the following fields:

- 1. Eligible Applicant Name: Test Company
- 2. Legal Structure: Corporation
- 3. Business Type: Owner
- 4. Organization Type: Non-Profit
- 5. Address: 714 P Street
- 6. State: California
- 7. County: Sacramento
- 8. City: Sacramento
- 9. Zip Code: 91605



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## 2. BUILD Online Application Submission

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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.
  - a. **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.

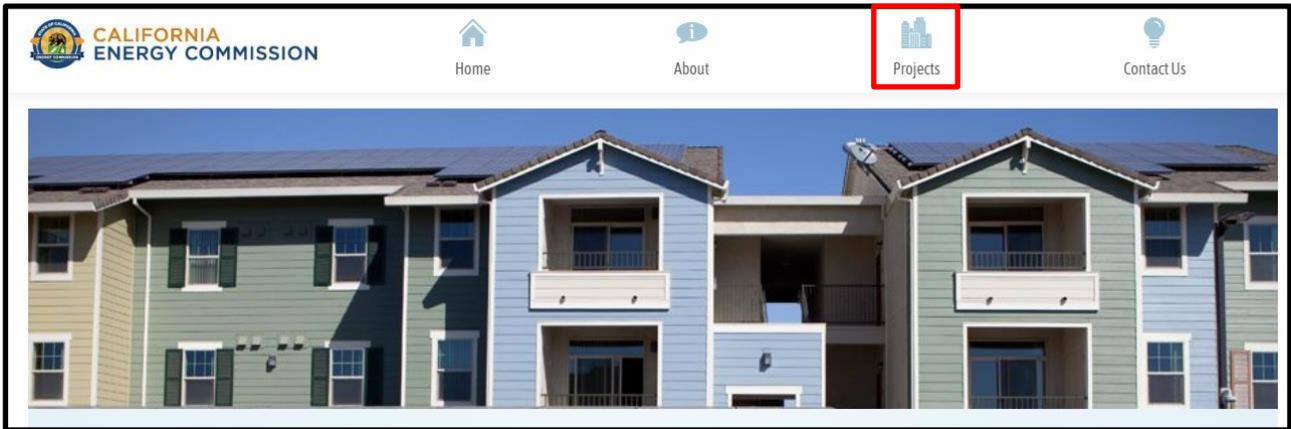


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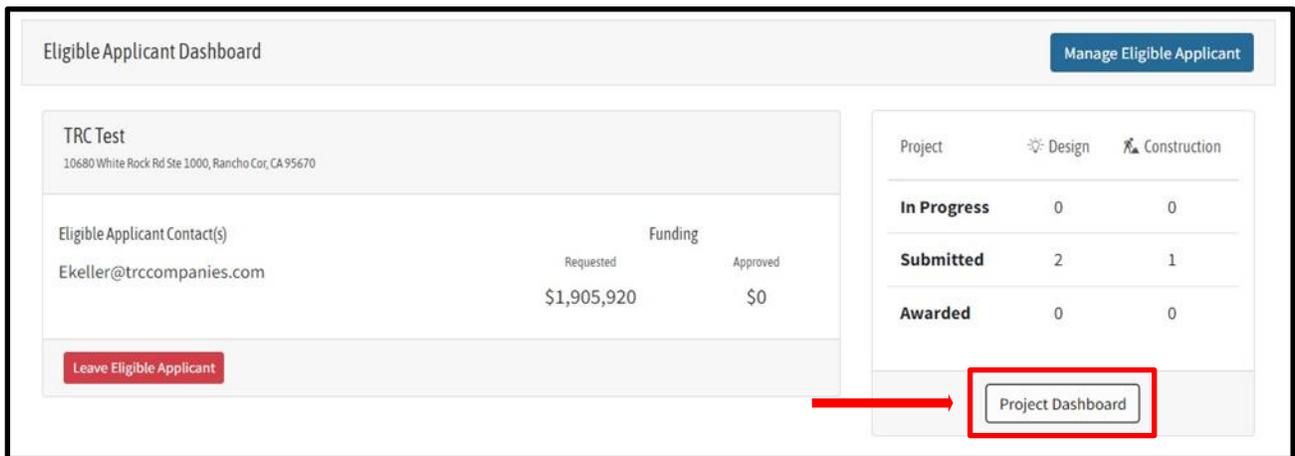
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## 2.2. BUILD Incentive Application

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.



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CA.GOV | Hello, Ekeller@trccompanies.com | Log out | Settings

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Hughson Co + New Project

**!** You have currently reached over the 2 million dollar cap per company, any subsequent applications will be rejected.

Project Stage	Case ID	Project Name	Est. Project Amt	Created Date	Status	
Design	C220024	Test Project	\$129,375.00	12/8/2022 5:20:16 PM	In Progress	<span style="border: 1px solid red; padding: 2px;">View</span>

## 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](https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/climate-zone-tool-maps-and) at <https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/climate-zone-tool-maps-and>

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Project Information

**Project Name** **Climate Zone (1-16)**

**Project Address**

**Project Address (line 2)**

**County** **City** **Zip Code**

**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, the project must be all-electric. Select Yes



from the dropdown menu to confirm the anticipated or under construction project is all-electric and does not have any gas distribution lines connected.

Q1. Project and all building associated are all-electric without gas distribution line?

Yes

**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.

Q2. Select gas utility territory which project is located.

Southern California Gas Company  
Pacific Gas and Electric Company  
San Diego Gas and Electric Company  
Southwest Gas Corporation  
My project is not in one of these territories (Your project does not qualify)

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

Q3. Select new building eligibility of the project.

New building: all-electric being planned or constructed  
Rehabilitation: 50% or more of existing building weight-bearing walls are removed  
Repurposed: existing building repurposed for housing (original use not housing)  
Project is none of the above (Project does not qualify)

**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.



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#### Q4. Select low-income eligibility of the project.

- Multifamily: located in disadvantaged community and consistent with affordable financing source requirements
- Multifamily: located in low-income community (at least 50% households income less than 60% AMI) and consistent with affordable financing source requirements
- Multifamily: at least 80% household income in building at or below 60% AMI
- Single family: low-income subject to resale restriction
- Single family: low-income subject to equity-sharing agreement

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](https://oehha.ca.gov/calenviroscreen/report/calenviroscreen-40) at <https://oehha.ca.gov/calenviroscreen/report/calenviroscreen-40>. 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).

Technical Assistance Questionnaire

Q1. Did you receive technical assistance from the BUILD Program for this project?

Yes v

Please provide technical assistance case number. (Example:T123456)

**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.



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Project Stage / Additional Questions

Q1. Do you have an approved building permit?

No Yes

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

Q2. Is this project located in a tribal community?

No Yes

Select the Update Project button at the bottom of the screen to save progress. 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.

Project Stage / Additional Questions

Q1. Do you have an approved building permit?

No

Q2. Is this project located in a tribal community?

No

Cancel Update Project



## 2.2.2. Supplemental Narrative

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

**Schedule:** Under the Supplemental Narrative header, use the calendar popup menu to select the appropriate date for each of the mandatory fields in red, and the optional fields in black.

The screenshot shows the 'Supplemental Narrative' tab in a web application. Under the 'Project Schedule' section, there are several input fields with calendar icons to their right. The fields are: 'Site Acquisition or Control Date', 'Estimated Initial Project Funding Awarded', 'Estimated Initial Loan', 'Estimated Building Permit Issuance', 'Estimated Construction Start Date', 'Estimated Construction End Date', and 'Estimated Temporary/Permanent Certificate of Occupancy Issuance'. A red box highlights the calendar icons for the first six fields.

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.

The screenshot shows three input fields for cost estimation. The first two are 'Estimated Predevelopment Phase Total Cost' and 'Estimated Construction Phase Total Cost'. The third is 'Total Estimated Project Cost'.

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



Estimated Temporary/Permanent Certificate of Occupancy Issuance

Estimated Predevelopment Phase Total Cost

Estimated Construction Phase Total Cost

Total Estimated Project Cost

**Update**

**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.

Initial Screening | **Supplemental Narrative** | Calculator Upload | Supporting Documents | Summary

Schedule | **Financing** | Affordable Income Restrictions | Modeled Resident Utility Cost Savings

Project Financing

**+ Add Project Financing Record**

No Project Financing Information

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.



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Initial Screening Supplemental Narrative Calculator Upload Supporting Documents Summary

Schedule Financing Affordable Income Restrictions Modeled Resident Utility Cost Savings

Project Financing

**Affordable Multifamily Housing Financing Source**

- CTCAC (California Tax Credit Allocation Committee) - 4%
- CTCAC (California Tax Credit Allocation Committee) - 9%
- AHSC (Affordable Housing and Sustainable Communities)
- CDLAC (California Debt Limit Allocation Committee)
- AHP (Affordable Housing Program)
- HCD (California Department of Housing and Community Development)
- CalHFA (California Housing Finance Agenda)
- USDA (United States Department of Agriculture)
- HUD (United States Department of Housing and Urban Development)
- Other (Ex. Local funding sources, fee waivers, developer fee, donation, etc.)
- Not Applicable

Save Cancel

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.

Initial Screening Supplemental Narrative Calculator Upload Supporting Documents Summary

Schedule Financing Affordable Income Restrictions Modeled Resident Utility Cost Savings

Project Financing

**Affordable Multifamily Housing Financing Source**

**Amount Requested/Awarded**

**Application Date**

**Award Date**

Save Cancel

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



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**Award Date**

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.

Initial Screening | **Supplemental Narrative** | Calculator Upload | Supporting Documents | Summary

Schedule | **Financing** | Affordable Income Restrictions | Modeled Resident Utility Cost Savings

Project Financing

Affordable Housing Financing Source	Amount requested/awarded	
CTCAC (California Tax Credit Allocation Committee) - 4%	\$300,000.00	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

**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.

Initial Screening | **Supplemental Narrative** | Calculator Upload | Supporting Documents | Summary

Schedule | Financing | **Affordable Income Restrictions** | Modeled Resident Utility Cost Savings

Project's Affordable Income Restrictions

**Length of Term of The Income Restrictions (>=15 Years)**

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.



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Test 1234 Slug Way	Project Type : Design Project Ref : C230160	Project Status In Progress		
Initial Screening	Supplemental Narrative	Calculator Upload	Supporting Documents	Summary
Schedule	Financing	Affordable Income Restrictions	Modeled Resident Utility Cost Savings	
Project's Affordable Income Restrictions				
<b>Length of Term of The Income Restrictions (&gt;=15 Years)</b>				
<input type="text"/>				
<b>Resale Restriction</b>				
<input type="text"/>				
<b>Equity Sharing Agreement</b>				
<input type="text"/>				
Public Entity providing housing to lower income households - _____ (fill in Public Entity name)				
<input type="text"/>				
Nonprofit 501(c)(3) Entity providing housing to lower income households _____ (fill in Nonprofit name)				
<input type="text"/>				
<b>Eligibility criteria for potential homebuyers</b>				
<input type="text"/>				
<input type="button" value="Update"/>				

**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.

Initial Screening	Supplemental Narrative	Calculator Upload	Supporting Documents	Summary
Schedule	Financing	Affordable Income Restrictions	Modeled Resident Utility Cost Savings	
Project's Modeled Resident Utility Cost Savings				
<b>The projects' residents will pay their individual electricity bills</b>				
<input type="text" value="Yes, residents will pay their respective/individual electricity bills, please describe how will PV benefit will be assigned"/>				
<input type="text" value="No, please describe the type of housing provided that exempts the project from meeting the modeled resident utility cost savings requirement"/>				
<input type="text" value="Yes, residents will pay their respective/individual electricity bills, please describe how will PV benefit will be assigned"/>				

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.

The screenshot shows the 'Supplemental Narrative' tab in the BUILD online system. The sub-tab is 'Modeled Resident Utility Cost Savings'. The form contains a section titled 'Project's Modeled Resident Utility Cost Savings' with a dropdown menu that reads 'The projects' residents will pay their individual electricity bills'. Below this is a text area for 'Notes' containing the text: 'The project will be enrolled in a virtual net energy metering agreement where PV will be allocated to each unit'. At the bottom left, an 'Update' button is highlighted with a red box.

### 2.2.3. Uploading Calculators

The Calculator Upload tab 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.**



# BUILD

Building Initiative for Low-Emissions Development Program

**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 sq ft	No. of Stories Above Grade	No. of Stories Below Grade	Total No. of Units	Total No. of Bedrooms
CZ	Gas Utility	Elec Utility	6,960	3	0	100	200
II	PG&E	PG&E					

**HVAC System**

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

**DHV System**

Select DHV Type	Select DHV Eff.	Select DHV Location	Select DHV/ Yes/No
Indv.	TIER 3	OUTSIDE	NO

**Envelope Measures**

Select Window	Select Ext. Wall Foamboard
U-Factor 0.30	R-Value 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 IA-13 Compliant HP/VHts	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	\$1500/lb	\$500/lb	\$200/unit	\$150/unit	\$250k/wh
100	0	0	0	0	0	50
\$ 5,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12,500.00

No. of EYSE	No. of Smart EYSE*	No. of Bi-Directional EYSE
\$300/unit	\$500/unit	\$1,000/unit
0	0	0
\$ -	\$ -	\$ -

\*For the purpose of the BUILD program, smart EYSE 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 program's 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:	38.44 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 =	-\$141
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/bedrm)	\$ 2,000	Based on % better than Title 24
Incremental PV Incentive (\$12 per watt)	\$ 22,781	Based on incremental PV in Step 2
<b>Total Kicker Incentive</b>	<b>\$ 360,481</b>	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 201 selected. Prescriptive assumptions that are not selectable have been used in the models that, if different from the applicable 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.

Initial Screening    Supplemental Narrative    **Calculator Upload**    Supporting Documents    Summary

**Instructions:**

- Select Files:** Select the files you wish to upload by clicking the 'Select File' button. Multiple files can be selected by clicking the button again or, in certain browsers, selecting multiple files. File drag and drop is also available in certain browsers. Note that file requirements apply.
- Upload Files:** Once your files have been selected, they will appear in the 'Files Awaiting Upload' section. Click on the 'Upload' button to transfer the files.
- Do not click on your browser's back or refresh buttons during upload.

Maximum file size: ~50 MB  
 Allowed file type: xls, xlsx

Drop files here

Select Please select file(s) to upload.

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.



Calculator Models		Total Estimated Incentive Amount: \$0			Total Remaining Allowable Incentive Award: (\$360,711)	
Include?	Project Name	Total GHG Avoided (MT)	Number of Structures	Incentive Amount Per Structure	Total Estimated Incentive Award	Status
<input type="checkbox"/>	3301 Kerner	32.605	0	\$220,721.35	\$0.00	Incomplete

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.

Additional Model Information Model Status: Incomplete

**1. Number of Structures**

**2. Number of HVAC Units**      **3. Number of Laundry Units**      **4. Number of Domestic Water Heaters**

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.

**7. Anticipated Number of Units with Income Restriction**      **8. Anticipated Restricted Affordability Level (%AMI)**

No anticipated restricted affordability level information

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	
<input type="checkbox"/>	3301 Kerner	32,605	5	\$220,721.35	\$1,103,606.73	Complete	<input type="button" value="Edit"/> <input type="button" value="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.

Initial Screening | Supplemental Narrative | Calculator Upload | **Supporting Documents** | Summary

**Instructions:**

- **Select Files:** Select the files you wish to upload by clicking the 'Select File' button. Multiple files can be selected by clicking the button again or, in certain browsers, selecting multiple files. File drag and drop is also available in certain browsers. Note that file requirements apply.
- **Upload Files:** Once your files have been selected, they will appear in the 'Files Awaiting Upload' section. Click on the 'Upload' button to transfer the files.
- Do not click on your browser's back or refresh buttons during upload.

**Required Documents:**

1. Preliminary Compliance Certificate(s)
2. Energy Model(s)

Maximum file size: ~50 MB  
Allowed file type: pdf, doc, docx, xls,xlsx, ppt, pptx, rtf, txt, jpg, jpeg, png, tif, gif, mp4, avi, wmv, mov, mpeg, bid, ribdx, ribd19, ribd19x, ribd22, ribd22x, ribd25, ribd28, ribd31, ribd34, ribd37, cibdx, cibd19, cibd19x, cibd22, cibd22x, cibd25, cibd28, cibd31, cibd34, cibd37

Drop files here

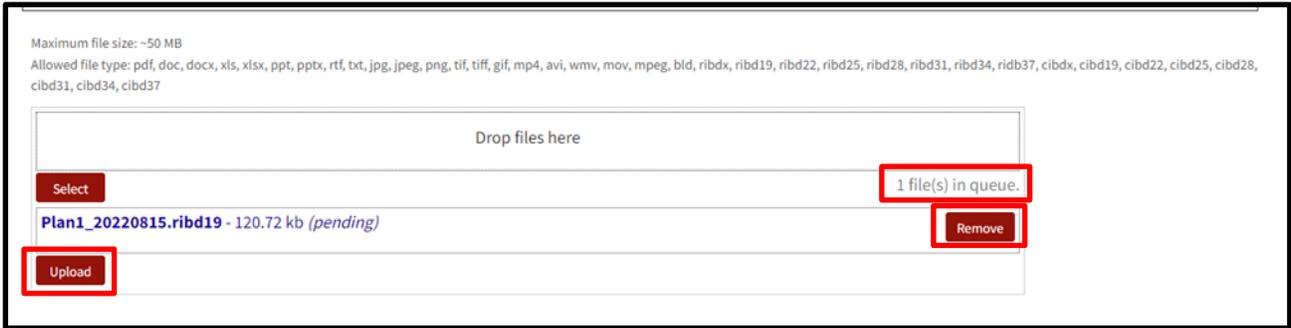
Please select file(s) to upload.

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.

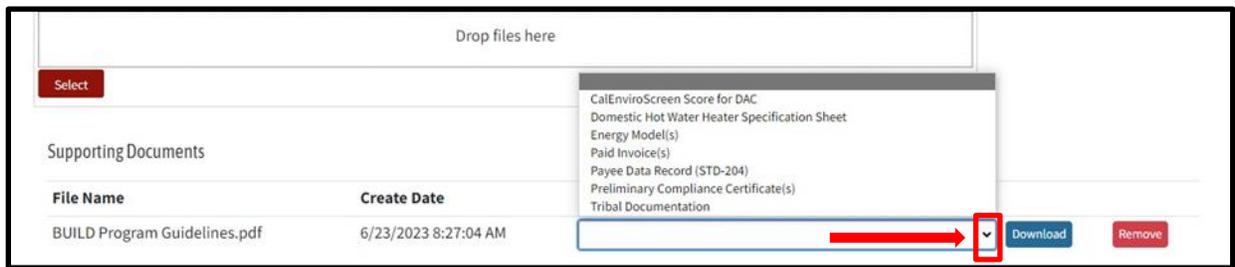


# BUILD

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Successfully uploaded files will appear under Supporting Documents section 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.



# BUILD

Building Initiative for Low-Emissions Development Program

## 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.

The screenshot shows the BUILD application interface. At the top, there is a navigation bar with the California Energy Commission logo and icons for Home, About, Projects, and Contact Us. Below the navigation bar, a pink notification box lists missing information: "You are missing required information in supplemental narrative." with sub-points for Schedule, Financing, Affordable Income Restrictions, and Modeled Resident Utility Cost Savings. It also lists "Missing Preliminary Compliance Certificate(s) document." and "Missing Energy Model(s) document." Below this, a dark blue header bar displays project details: "Test 1234 Slug Way", "Project Type: Design", "Project Ref: C230160", and "Project Status: In Progress". A horizontal menu below the header has tabs for "Initial Screening", "Supplemental Narrative", "Calculator Upload", "Supporting Documents", and "Summary", with "Summary" being the active tab. The main content area is divided into sections: "Project Summary" with a table of incentive values, "Project Contact Information" with a dropdown menu, and a "Submit Project" button. A note at the bottom states: "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."

Project Summary	
GHG Base Incentive	\$0
Building Efficiency Incentive	\$0
PV Incentive	\$0
Total Kicker Incentive	\$0
Total BUILD Incentive	\$0
Eligible Building In Project	0

Project Contact Information	
<input type="text"/>	

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](#)

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



Initial Screening	Supplemental Narrative	Calculator Upload	Supporting Documents	Summary
-------------------	------------------------	-------------------	----------------------	---------

Project Summary This Application is possibly eligible for new adopter design award

GHG Base Incentive	\$324,000
Building Efficiency Incentive	\$176,000
PV Incentive	\$0
Total Kicker Incentive	\$80,000
Total BUILD Incentive	\$580,000
Eligible Building In Project	4

**NOTE:** If there are any technical issues while filling out the form or uploading documents, please contact [BUILD@energy.ca.gov](mailto: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.

Project Contact Information

▼

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

**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



# BUILD

Building Initiative for Low-Emissions Development Program

application review process, BUILD staff may 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](mailto:BUILD@energy.ca.gov) to request support and instructions.

**Withdrawal or Cancellation:** To cancel or withdrawal an application, please notify BUILD staff by sending an email to [BUILD@energy.ca.gov](mailto:BUILD@energy.ca.gov). Once received and processed, applicant will receive a project status notification confirming the withdrawal or cancellation 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.



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Project	🔦 Design	🏗️ Construction
<b>In Progress</b>	2	2
<b>Submitted</b>	1	0
<b>Awarded</b>	0	0

[Project Dashboard](#)

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.

Project Stage	Case ID	Project Name	Est. Project Amt	Created Date	Status	
Design	C230108	Cherries - Test	\$0.00	6/9/2023 8:54:14 AM	Approved	<a href="#">Transition</a> <a href="#">View</a>

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.



# BUILD

Building Initiative for Low-Emissions Development Program

## Congratulations!

on reaching the next milestone of the project's incentive reservation

To access the Step 2 Construction application, please upload and submit the project's building permit(s).

In the application, update project information (greyed fields are locked and not editable) and upload required documents. For a list of documents required, please reference the [Step 2 Construction Application Checklist](#).

**Instructions:**

1. Click on the Select button below.
2. Select the building permit file.
3. Click on the Upload button to complete the upload from pending.
4. Note: Do not click on the browser's back or refresh buttons during the upload.
5. Click on the Submit Transition Request at the bottom of the page to submit the request.

**Important:** If you do NOT finish the submission process, this page will appear again at the next log in and require the building permit upload and submittal.

Maximum file size: ~50 MB  
Allowed file type: doc, docx, pdf

**Please upload your Building Permit**

Select

SUBMIT TRANSITION

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.

Test Company						<a href="#">+ New Project</a>
Project Stage	Case ID	Project Name	Est. Project Amt	Created Date	Status	
Design	C230108	Cherries - Test	\$0.00	6/9/2023 8:54:14 AM	Complete	<a href="#">View</a>
Construction	C230108	Cherries - Test	\$0.00	6/14/2023 12:16:36 PM	In Progress	<div style="border: 2px solid red; padding: 2px;"><a href="#">View</a></div>

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 button, or documents can be dragged and dropped into the box noted with "Drop files here" highlighted below.

The screenshot shows the 'Supporting Documents' section of the BUILD application. At the top, there is a header with project information: 'Cherries - Test', '123 Cherries Ave', 'Project Type: Construction', 'Project Ref: C230108', and 'Project Status: In Progress'. Below the header is a navigation bar with tabs: 'Initial Screening', 'Supplemental Narrative', 'Calculator Upload', 'Supporting Documents' (highlighted), and 'Summary'. The main content area contains 'Instructions' and 'Required Documents'. The 'Instructions' section lists: 'Select Files', 'Upload Files', and a note about not clicking back or refresh. The 'Required Documents' section lists '1. Compliance Certificate(s)'. Below this, there is a file upload area with a red box highlighting a 'Drop files here' box and a 'Select' button. The text 'Please select file(s) to upload.' is visible to the right of the button. At the bottom, there is a section titled 'Supporting Documents' with the text 'No supporting documents uploaded'.

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.



Maximum file size: ~50 MB  
Allowed file type: pdf, doc, docx, xls,xlsx, ppt, pptx, rtf, txt, jpg, jpeg, png, tif, tiff, gif, mp4, avi, wmv, mov, mpeg, bld, ribdx, ribd19, ribd19x, ribd22, ribd22x, ribd25, ribd28, ribd31, ribd34, ribd37, cibdx, cibd19, cibd19x, cibd22, cibd22x, cibd25, cibd28, cibd31, cibd34, cibd37

Drop files here

Select Please select file(s) to upload.

Supporting Documents

File Name	Create Date	Document Type		
1000645_RA1_Preliminary_v1.pdf	6/14/2023 1:28:02 PM	<input type="text"/>		<input type="button" value="Download"/> <input type="button" value="Remove"/>

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, it will be displayed at the top of the page in red, shown below.

Missing Compliance Certificate(s) document.

**Cherries - Test** Project Type: Construction Project Status  
123 Cherries Ave Project Ref : C230108 In Progress

Initial Screening | Supplemental Narrative | Calculator Upload | Supporting Documents | **Summary**

Project Summary

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.



# BUILD

Building Initiative for Low-Emissions Development Program

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 Efficiency 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**



# BUILD

Building Initiative for Low-Emissions Development Program

## 3. BUILD Online Claims Submission

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An applicant approved for new adopter design award or incentives may submit a payment claim request to reimburse or pay BUILD program eligible costs. **APPLICANTS PLEASE NOTE:** Current claim functionality does not allow a user to “save” a claim or exit the program before hitting the Submit Claim button. The claim must be completed in its entirety and submitted or all previously inputted information will be lost.

### 3.1. Overview of the BUILD Payment Claim Request

The BUILD Online payment claim process follows the application reservation stages:

- **Step 1: New Adopter Design Award**  
Complete and submit the payment claim form to receive the New Adopter Design Award payment, if applicable.
- **Step 2: Construction Progress Payments**  
Upon approval of the construction reservation, applicant may submit one payment claim to receive up to 25 percent of the calculated base GHG incentive value or actual eligible costs, whichever is less. Upon demonstration (geotagged photograph) that the project foundation has been constructed, applicant may submit one payment claim for no more than 50 percent of the calculated base incentive value or actual eligible costs, whichever is less. The total of these two payments cannot exceed 75 percent of the calculated base GHG incentive value, or actual eligible costs, whichever is less.
- **Step 3: Project Completion Final or Lump Sum Payment**  
Complete and submit the payment claim form to receive the remaining portion of base GHG incentive amount and any remaining incentive funding will be released to reimburse for actual eligible costs.

### 3.2. Payment Claims

Pursuant to the BUILD Program Guidelines an applicant may submit no more than four payment claims on any project under the program including the new adopter design award payment, if applicable. No additional claims, or amendments to claims, will be accepted after the final payment claim for the project completion package is approved. Once the final incentive is paid, changes to expand or improve the expected performance of a building are not eligible for BUILD funding.

### 3.3. Assignment of Incentives

Applicants may assign their incentive payment to another party, one assignment is allowed for each payment claim. The applicant must submit a payee data record (STD-204) for the assigned party. Please note the applicant will still be reported as the recipient of the incentive payments for tax purposes.



# BUILD

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## 3.4. Supporting Documentation

Please have all supporting documentation for the payment claim request prior to logging in BUILD Online System. All information and documentation provided during a claim are saved only after successfully selecting the Submit Claim button and confirmation message is received.

All applicants with an approved application requesting a BUILD incentive payment must submit the following:

### Step 1: New Adopter Design Award

1. Eligible invoices and proof of payment
2. [Step 1: New Adopter Payment Claim Worksheet](#)
3. [Payee Data Record \(STD 204\)](#)
  - a. One for the applicant
  - b. one for the assigned party if payment will be made to another entity.

### Step 2: Construction

1. Eligible invoices and proof of payment
2. [Step 2: New Adopter Payment Claim Worksheet](#)
3. Geotagged photo of the project's completed foundation pour if the claim request is 50% the base GHG incentives
4. [Payee Data Record \(STD 204\)](#)
  - One for the applicant
  - one for the assigned party if payment will be made to another entity.

### Step 3: Project Completion

1. Eligible invoices and proof of payment
2. [Step 3: Lump Sum Payment Claim Worksheet](#)-the system will use Worksheet B -Kicker Incentives and Worksheet C- PV system to calculate the amount to be paid. If the project does not have kicker incentives and/or PV system, enter \$0.
  - a. Worksheet A – Eligible Costs List
  - b. Worksheet B – Kicker Incentives
  - c. Worksheet C – PV System
3. [Payee Data Record \(STD 204\)](#)
  - a. for the applicant
  - b. for the assigned party if payment will be made to another entity.

Items 4-8: These items need not be uploaded to create a claim if they were already submitted during Step 3: Project Completion application.

4. Proof of Equipment Procurement for kickers and PV installed on the project.



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5. PTO (Permission to operate for solar systems).
6. Certificate of Occupancy (or temporary)
7. Recorded Regulatory Agreement/Deed Restriction; Resale restriction or equity sharing agreement
8. Energy Efficiency Verifications (CF-2R, CF-3R).

**NOTE:** Submit one PDF, inclusive of all invoices in a searchable PDF file,  
<https://www.adobe.com/acrobat/hub/make-a-pdf-searchable.html>

Any question on what must be compiled prior to logging into BUILD online system to create a payment claim request, contact BUILD staff at [BUILD@energy.ca.gov](mailto:BUILD@energy.ca.gov).



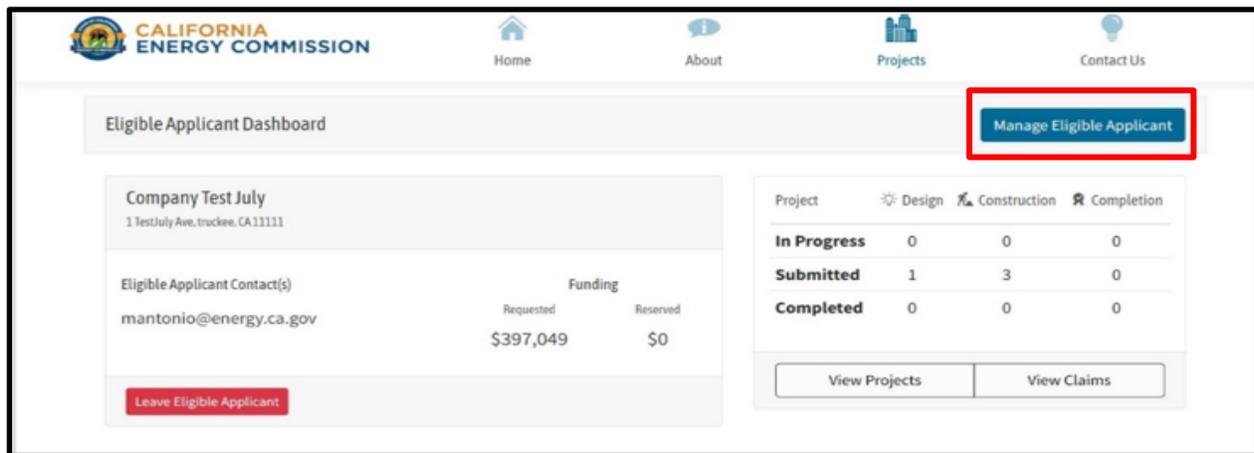
# BUILD

Building Initiative for Low-Emissions Development Program

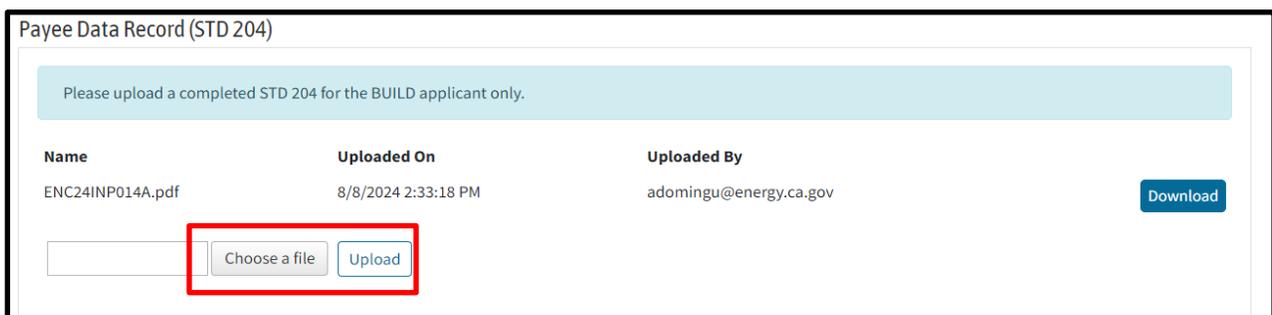
## 3.5. Payment Claim Request for New Adopter Award or Step 2: Construction

Please have all supporting documentation for the payment claim request prior to logging in BUILD Online System. Eligible invoices and proof of payment must be in a PDF searchable file, <https://www.adobe.com/acrobat/hub/make-a-pdf-searchable.html>. All information and documentation provided during a claim are saved only after successfully selecting the Submit Claim button and confirmation message is received.

To start a payment claim request, the person with a Company Admin user role logs into to BUILD Online. Once logged into BUILD Online, select "Projects" at the top of the page. Select "Manage Eligible Applicant".



On the Eligible Applicant Dashboard under the Payee Data Record section, select "Choose a file", select the BUILD applicant Payee Data Record (STD 204) from applicant's device. Click Upload. If applicant needs to complete a Payee Data Record form (STD 204), the form is available at <https://www.energy.ca.gov/media/7030>.



Once the form is added, select Projects on the top of the page.



Select View Claims to go to the Claims Dashboard.

The screenshot shows the 'Eligible Applicant Dashboard' for 'Seymour'. It includes a 'Manage Eligible Applicant' button, contact information, and a funding table. A table on the right shows project status counts, and the 'View Claims' button is highlighted with a red box.

Project	Design	Construction	Completion
<b>In Progress</b>	0	0	0
<b>Submitted</b>	0	5	0
<b>Completed</b>	0	0	0

The applicant's Claims Dashboard has two sections: Qualifying Projects and Claims. The Qualifying Projects section shows all approved projects for which the applicant may request a payment. The Claims section shows all the active claims.

Select Create Claim to initiate a BUILD incentives payment claim request.

The screenshot shows the 'Claim Dashboard for Company Test July'. It features a 'Qualifying Projects' table with one entry and a 'Claims' section that is currently empty. The 'Create Claim' button is highlighted with a red box.

Case ID	Project Stage	Project Name	Est. Project Amt	Submitted Date
C240286	Construction	CompanyTest.July2	\$43,299.00	7/16/2024 11:31:00 AM

On the attestation page, click in each box and select I Agree, Continue to continue with the payment claim request.



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I understand that eligible applicants may choose to accept a lower incentive amount than calculated by the CEC under the program, and that I must indicate this at the time of the construction reservation.

I understand that applications are accepted on a first-come, first-served basis, and that construction reservations will be approved in accordance with funding amounts attributed to each specific gas utility territory while funds are available.

The information provided is true and correct and that the proposed project meets the requirements of the BUILD Guidelines and to the accuracy and completeness of information submitted.

I am responsible for any omissions or errors that may result in delay or denial of the payment claim.

Only one payment assignee to a third party is allowed for each progress payment and must be identified with each payment claim form submittal; otherwise the progress payments are non-transferrable.

The Applicant is responsible for any federal, state, and local taxes associated with the receipt of progress payments. Applicants who assign their progress payments to third parties will remain responsible for ensuring compliance with any other legal requirements associated with the reservation payment, including any tax consequences, despite the payment's assignment.

Please have the following information/documents ready before you begin the claim filing process

- Incurred Cost

I, the undersigned, am authorized to legally bind the Applicant and hereby certify, under penalty of perjury, the information provided in this claim form is accurate.

Do you wish to continue filing a claim for SeymourTEST

No I Agree, Continue

D

The Claims Options screen appears after agreeing to the attestations. To make a claim: Select the claim option.

Claim Options

Please select the claim option to update the max incentive amount for claim

Up to 25% of Base Up to 75% of Base

GHG Base Incentive Amount Available	Max Incentive Amount for claim	Amount Requested
\$67,320.00	\$16,830.00	\$16,830.00

In this example, 25% of base incentive is the claim request at Step 2: Construction. For New Adopter Design Award payment request, a "New Adopter" banner will be displayed on the screen. Click New Adopter.

### 3.5.1. Amount Requested Field

Enter the dollar amount in the Amount Requested field. The dollar amount requested must be equal to or less than the Max Incentive Amount for claim. Required Documents:

Upload the following required documents:

1. Worksheet A: Eligible Costs List



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2. Incurred Cost(s): invoices, proof of payment
3. Geotagged photo of the project's constructed foundation if payment request is greater than 25% of base GHG incentive in Step 2-Construction

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.

Required Document(s)

Please upload the following documents

- **Worksheet A - Eligible cost list (allowed document type: xls and xlsx)**
- **Incurred Cost (allowed document type: pdf, xls, and xlsx)**

## 3.5.2. Progress Payment

Complete the Progress Payment section to identify who will receive the payment.

Choose No or Yes to the question: Is payment assigned to another party?

Progress Payment

Is payment assigned to another party?

**Selecting No:** The paper check will be issued to the applicant. If the applicant is not assigning the payment, select NO and SUBMIT CLAIM at the bottom of the page.

**Note:** If the Tax ID Number (TIN) of the entity that will receive the check is different from the applicant's TIN, the payment claim is an assignment.

**Selecting Yes:** The paper check will be issued to the assigned party. The applicant will provide additional details below. Applicants may assign their incentive payment to another party on each specific payment and will still be reported as the recipients of the incentive payments for tax purposes. One assignment is allowed for each payment, and with each new assignee, the applicant must file a new appropriate payee data record (STD-204).



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Is payment assigned to another party? Yes ▾

Payment Assignment Request:  
I  the applicant or authorized representative of the applicant as specified on the Incentive Reservation Application Form, hereby assign the right to receive payment for the above noted award under the BUILD Program to the following individual or entity and request that payment be forwarded to this individual or entity, addressed below. A Payee Data Record (STD 204) must be submitted for the person/entity receiving the payment, if it is not already on record with the Energy Commission.

**!** The following information must match with the uploaded Payee Data Record (STD-204).

**Assigned Party Name**

**Address**

**City** **State** **Zip Code**  
  ▾

**Payee Data Record (STD-204) (allowed document type: pdf)**

When assigning payment to another party, the information in the payment assignment section must match the information on the assigned party's Payee Data Record (STD 204).

**Note:** The Payee Data Record (STD 204) **must** be uploaded prior to clicking Submit Claim. Pressing the Submit Claim, without the Payee Data Record (STD 204) selected beforehand will result in the system notifying of the missing documents and result in the loss of all progress. A Payee Date Record Form (STD 204) is available at <https://www.energy.ca.gov/media/7030>.



Press Submit Claim once the Progress Payment section is completed and is accurate.

Progress Payment

Is payment assigned to another party? No ▾

Project Design or Timetable Changes (If Applicable)

Submit Claim

After submitting a claim, a new page will appear with a message the claim has been submitted.

Your claim has been submitted. ←

### Claim Dashboard for Test August2

Qualifying Projects

No qualifying project to create claim.

Claims

<a href="#">Case ID</a>	<a href="#">Claim Reference</a>	<a href="#">Claim Type</a>	<a href="#">Claim Amount</a>	<a href="#">Created Date</a>	<a href="#">Status</a>	
C240283	24NAW101A	NewAdopter	\$8,150.00	8/15/2024 8:59:46 AM	Submitted	<button>View Claim</button>

Once submitted, the payment claim request will be in queue in the order received. The submitted claim will not be available for modification until it has been reviewed and its Status is updated by BUILD Staff.



During the payment claim review process, BUILD staff may request additional documentation from eligible applicants to complete the approval process. Once the payment claim is approved, the status of the claim will change to from Submitted to Claim Awarded.

Claim Dashboard for Test Sept 24 NA 9

Qualifying Projects					
Case ID	Project Stage	Project Name	Est. Project Amt	Submitted Date	
C240293	Construction	Test Sept 24 NA Project 9	\$133,576.00	9/22/2024 3:46:00 PM	<button>Create Claim</button>

Claims						
Case ID	Claim Reference	Claim Type	Claim Amount	Created Date	Status	
C240293	24NAS101A	NewAdopter	\$100,000.00	9/22/2024 3:53:45 PM	Claim Awarded	<button>View Claim</button>
C240293	24INS119A	Partial25Pct	\$15,997.50	9/24/2024 1:46:15 PM	Claim Awarded	<button>View Claim</button>

Once submitted, please allow for up to 30 business days (excluding State holidays) for any claim request to be processed. Please also allow an additional 14 business days once a claim has been approved for the issuance of the paper check from the California State Controller’s Office. For any questions regarding the status of a claim request, or to report that the paper check has been lost/stolen, please contact BUILD staff at [BUILD@energy.ca.gov](mailto:BUILD@energy.ca.gov) and include the Case ID and Claim Reference ID in the subject line.

Only one claim request can be submitted per Qualifying Project at any given time. To cancel a claim request or request assistance regarding the claim request, please contact BUILD staff at [BUILD@energy.ca.gov](mailto:BUILD@energy.ca.gov).

**Note:** In the event the check is lost/stolen, please allow up to 14 business days (excluding State excludes) for the re-issuance of a replacement paper check.



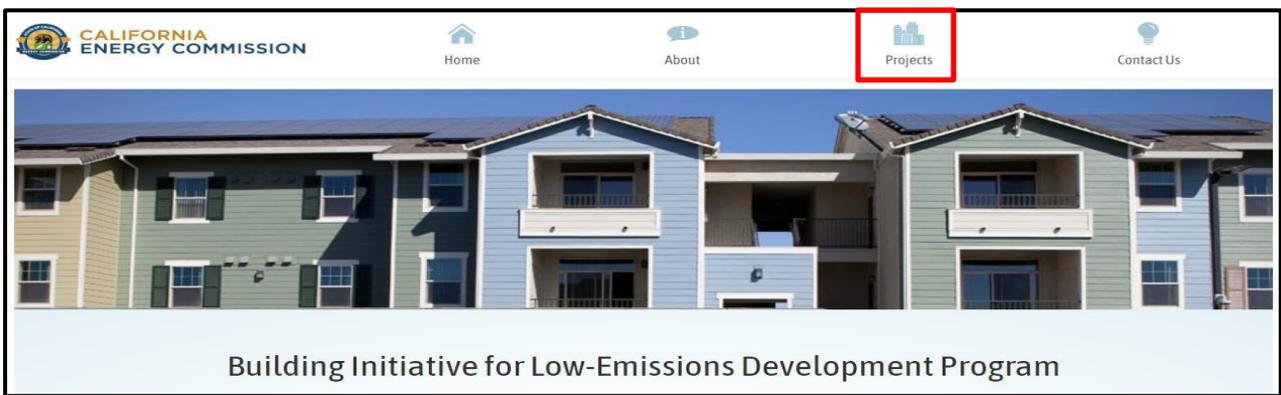
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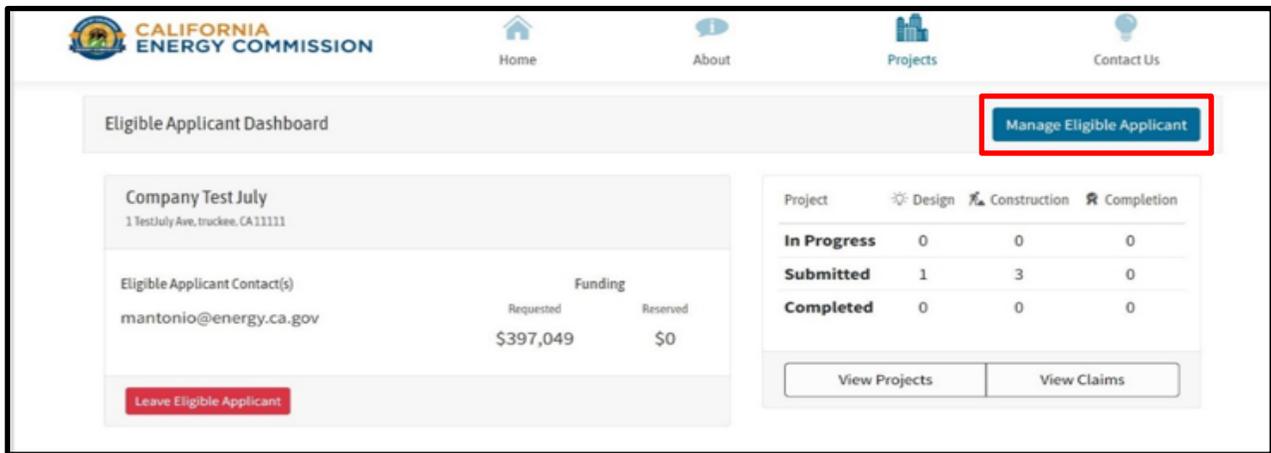
## 3.6. Step 3 Project Completion

Please have all supporting documentation for the payment claim request prior to logging in BUILD Online System. Eligible invoices and proof of payment must be in a PDF searchable file, <https://www.adobe.com/acrobat/hub/make-a-pdf-searchable.html>. All information and documentation provided during a claim are saved only after successfully selecting the Submit Claim button and confirmation message is received.

To start a payment claim request, the individual with a Company Admin user role logs into to BUILD Online. Once logged into BUILD Online, select Projects at the top of the page.



Select Manage Eligible Applicant



On the Eligible Applicant Dashboard under the Payee Data Record section, select Choose a file, select the BUILD applicant Payee Data Record (STD 204) from applicant's device. Click Upload. If applicant does not have a completed Payee Data Record form (STD 204), the form is available at <https://www.energy.ca.gov/media/7030>.

Once the form has been uploaded select Projects at the top of the page.



Payee Data Record (STD 204)

Please upload a completed STD 204 for the BUILD applicant only.

Name	Uploaded On	Uploaded By	
ENC24INP014A.pdf	8/8/2024 2:33:18 PM	adomingu@energy.ca.gov	<a href="#">Download</a>

[Choose a file](#) [Upload](#)

## Select View Claims

The screenshot shows the 'Eligible Applicant Dashboard' for 'Company Test July'. It includes a navigation bar with 'Home', 'About', 'Projects', and 'Contact Us'. A 'Manage Eligible Applicant' button is in the top right. The dashboard displays applicant information, contact details, and a funding table. A 'View Claims' button is highlighted with a red box.

Eligible Applicant Contact(s)	Funding	
	Requested	Reserved
mantonio@energy.ca.gov	\$397,049	\$0

Project	Design	Construction	Completion
In Progress	0	0	0
Submitted	1	3	0
Completed	0	0	0

[View Projects](#) [View Claims](#)

The applicant's Claim Dashboard has two sections: Qualifying Projects and Claims. The Qualifying Projects section shows all approved projects for which the applicant may request a payment request. The claims section shows all the active claims.

## Select Create Claim



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Case ID	Project Stage	Project Name	Est. Project Amt	Submitted Date	
C240286	Construction	CompanyTestJuly2	\$43,299.00	7/16/2024 11:31:00 AM	<a href="#">Create Claim</a>

On the attestation page, click each box and select I Agree, Continue to continue with the payment request.

The information provided is true and correct and that the proposed project meets the requirements of the BUILD Guidelines and to the accuracy and completeness of information submitted.

I am responsible for any omissions or errors that may result in delay or denial of the payment claim.

Only one payment assignee to a third party is allowed for each progress payment and must be identified with each payment claim form submittal; otherwise the progress payments are non-transferrable.

The Applicant is responsible for any federal, state, and local taxes associated with the receipt of progress payments. Applicants who assign their progress payments to third parties will remain responsible for ensuring compliance with any other legal requirements associated with the reservation payment, including any tax consequences, despite the payment's assignment.

Please have the following information/documents ready before you begin the claim filing process

- Incurred Cost
- Worksheet PV and Kicker cost list

I, the undersigned, am authorized to legally bind the Applicant and hereby certify, under penalty of perjury, the information provided in this claim form is accurate.

Do you wish to continue filing a claim for CompanyTestJuly2

### 3.6.1. Required Documents

Upload the Project Completion Worksheet by selecting Click here to select worksheet and selecting the completed worksheet from the applicant's device. Press Calculate after uploading the completed worksheet.



# BUILD

Building Initiative for Low-Emissions Development Program

Incentive Details

**Upload Incentive Worksheet**

To facilitate the calculation of your available reimbursement amount for the project, kindly upload your Project Completion Worksheet.  
If you do not possess the worksheet, please contact BUILD staff at [buildunit@energy.ca.gov](mailto:buildunit@energy.ca.gov).

[Click here to select worksheet](#)

The system will populate the estimated PV Incentive and Kicker incentive from the worksheet itself. The remaining reimbursable incentive (GHG base, Building Efficiency) will be calculated automatically after the applicable worksheets have been uploaded.

If applicant needs to replace the uploaded worksheet, select [Click here to select worksheet](#) and upload the new worksheet. Press Calculate to re-calculate the amounts.

Incentive Details

**Upload Incentive Worksheet**

To facilitate the calculation of your available reimbursement amount for the project, kindly upload your Project Completion Worksheet.  
If you do not possess the worksheet, please contact BUILD staff at [buildunit@energy.ca.gov](mailto:buildunit@energy.ca.gov).

[Click here to select worksheet](#)

Maximum reimbursable incentive amount for PV and Kicker has been updated.

	GHG Base Incentive	Building Efficiency Incentive	PV Incentive	Kicker Incentive	Total BUILD Incentive
Awarded Funding Amount	\$24,255.00	\$11,160.00	\$3,484.00	\$4,400.00	\$43,299.00
Maximum Reimbursable Amount	\$6,063.75	\$11,160.00	\$3,484.00	\$4,000.00	\$43,299.00
Reimbursable Amount Requested	<input type="text" value="\$6,063.75"/>	<input type="text" value="\$11,160.00"/>	<input type="text" value="\$3,484.00"/>	<input type="text" value="\$4,000.00"/>	<input type="text" value="\$24,707.75"/>

The dollar amounts requested must be equal to or less than the Maximum Reimbursable Amount for each incentive type.

Upload the supporting documents for the claim request by clicking [Select](#) for each item to upload the documents below:



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1. Incurred Costs(s): invoices, proof of payment
2. Geotagged photo of the project's completed foundation pour  
(If claim request has not been made during Step 2-Construction)

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.

Required Document(s)

Please upload the following documents

- Incurred Cost (allowed document type: pdf, xls, and.xlsx)

To complete the Final Payment section, please refer to [Section 3.5.2 Progress Payment](#).

Press Submit Claim once the Final Payment section is completed and is accurate.

Project Design or Timetable Changes (If Applicable)

After submitting a claim, a new page will appear with a message the claim has been submitted. The payment claim will be in queue in the order received. The submitted claim will not be available for modification until it has been reviewed and its Status is updated by BUILD Staff.



Your claim has been submitted.

### Claim Dashboard for Test August2

Qualifying Projects

No qualifying project to create claim.

Claims

Case ID	Claim Reference	Claim Type	Claim Amount	Created Date	Status	
C240283	24NAW101A	NewAdopter	\$8,150.00	8/15/2024 8:59:46 AM	Submitted	<button>View Claim</button>

During the payment claim review process, BUILD staff may request additional documentation from eligible applicants to complete the approval process. Once the payment claim is approved, the status of the claim will change from Submitted to Claim Awarded.

### Claim Dashboard for Test Sept 24 NA 9

Qualifying Projects

Case ID	Project Stage	Project Name	Est. Project Amt	Submitted Date	
C240293	Construction	Test Sept 24 NA Project 9	\$133,576.00	9/22/2024 3:46:00 PM	<button>Create Claim</button>

Claims

Case ID	Claim Reference	Claim Type	Claim Amount	Created Date	Status	
C240293	24NAS101A	NewAdopter	\$100,000.00	9/22/2024 3:53:45 PM	Claim Awarded	<button>View Claim</button>
C240293	24INS119A	Partial25Pct	\$15,997.50	9/24/2024 1:46:15 PM	Claim Awarded	<button>View Claim</button>

Once submitted, please allow for up to 30 business days (excluding State holidays) for any claim request to be processed. Please also allow an additional 14 business days once a claim has been approved for the issuance of the paper check from the California State Controller’s Office. For any questions regarding the status of a claim request, or to report that the paper check has been lost/stolen, please contact BUILD staff at [BUILD@energy.ca.gov](mailto:BUILD@energy.ca.gov) and include



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the Case ID and Claim Reference ID in the subject line.

Only one claim request can be submitted per Qualifying Project at any given time. To cancel a claim request or request assistance regarding the claim request, please contact BUILD staff at [BUILD@energy.ca.gov](mailto:BUILD@energy.ca.gov).

**Note:** In the event the check is lost/stolen, please allow up to 14 business days (excluding State excludes) for the re-issuance of a replacement paper check.