BUILD Incentive Application System (BUILD Online) Instructions

Introduction

The California Energy Commission (CEC) administers the [Building Initiative for Low-Emissions Development (BUILD)](#) 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 Program webpage](#).

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

Contents

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 the Register link in the upper right corner of the screen.
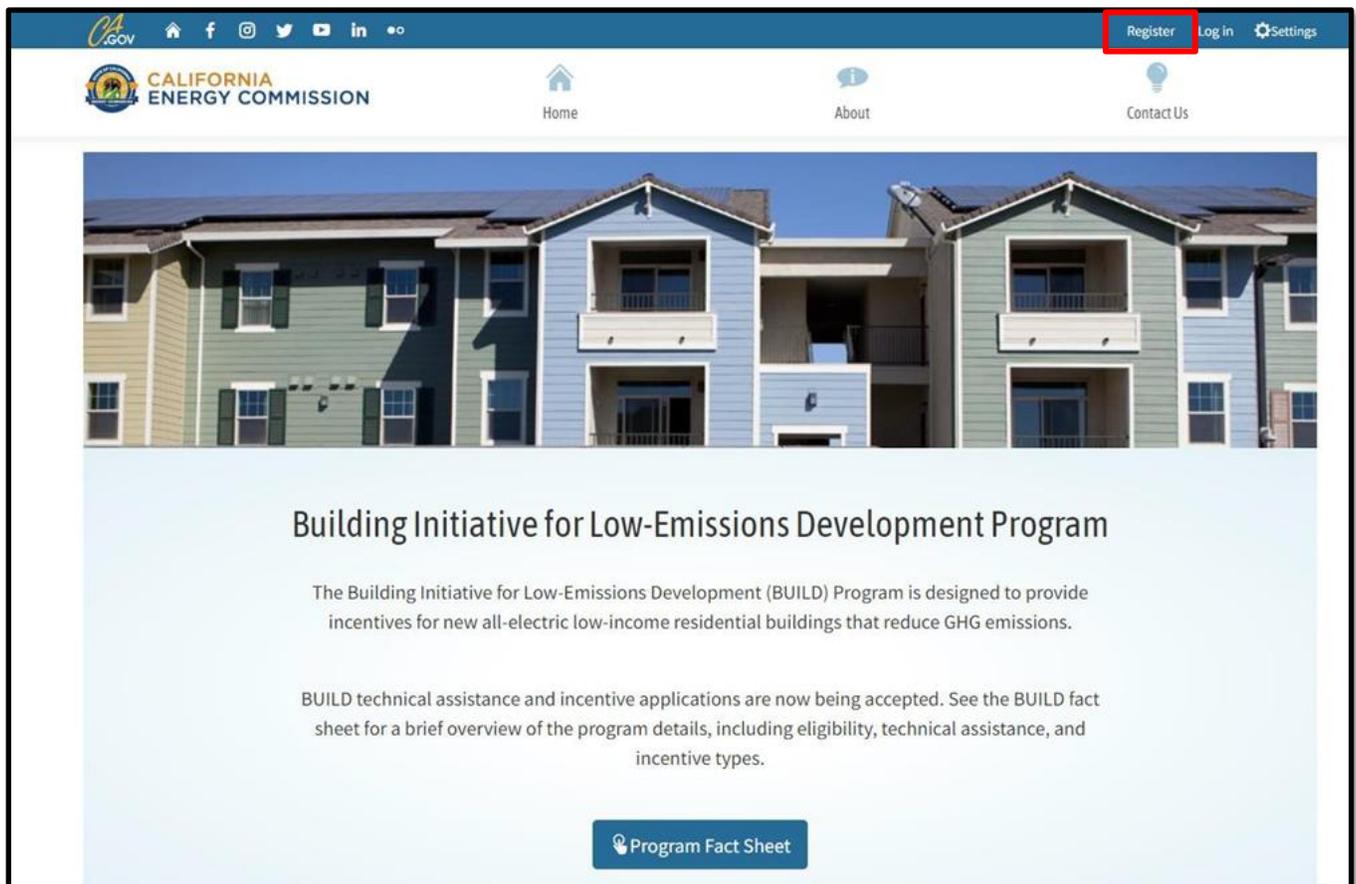
The Register button will open the account creation page. Fill in each section of the page with the proper user information. Once the registration information is complete, select Register at the bottom of the page.
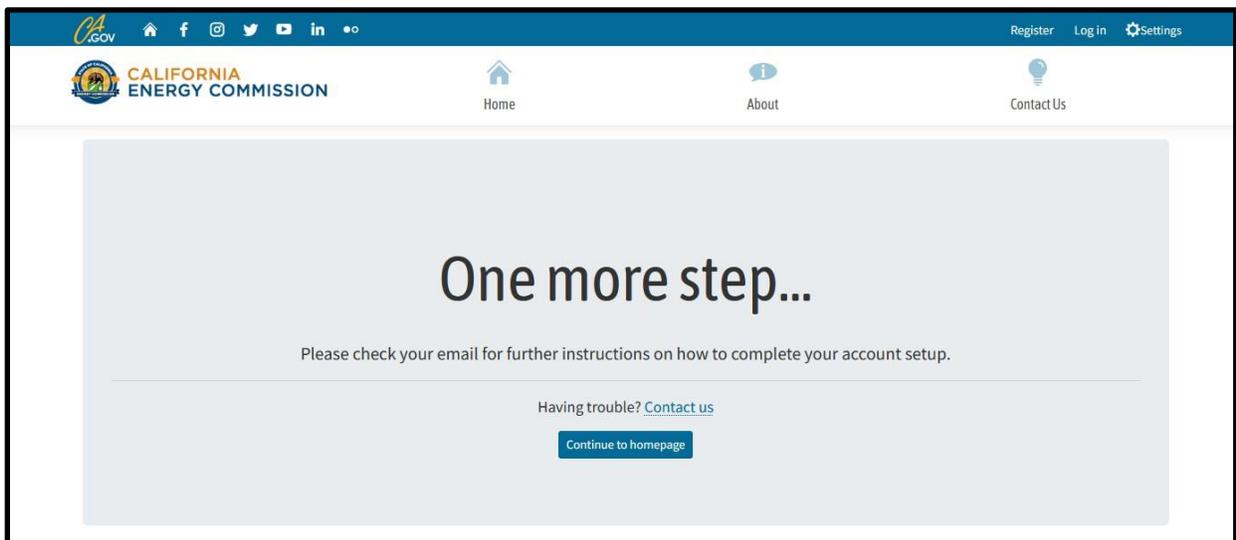
Once registration is complete and submitted, a verification email will be sent to the registered email. Follow the instructions in the email to verify the account.

Once the email verification is complete, click the "here" link that is highlighted below.
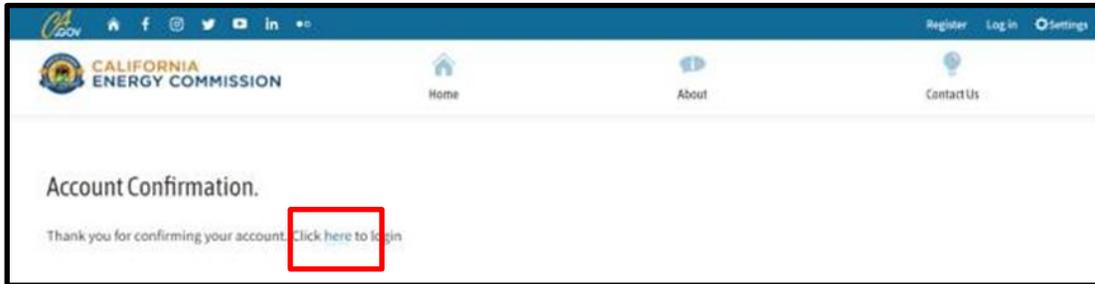
Log into BUILD Online with the newly verified credentials. BUILD Online requires multi-factor authentication for log in through the registered email. When prompted after logging in, click the Submit button, which will send a verification code to the registered email address.
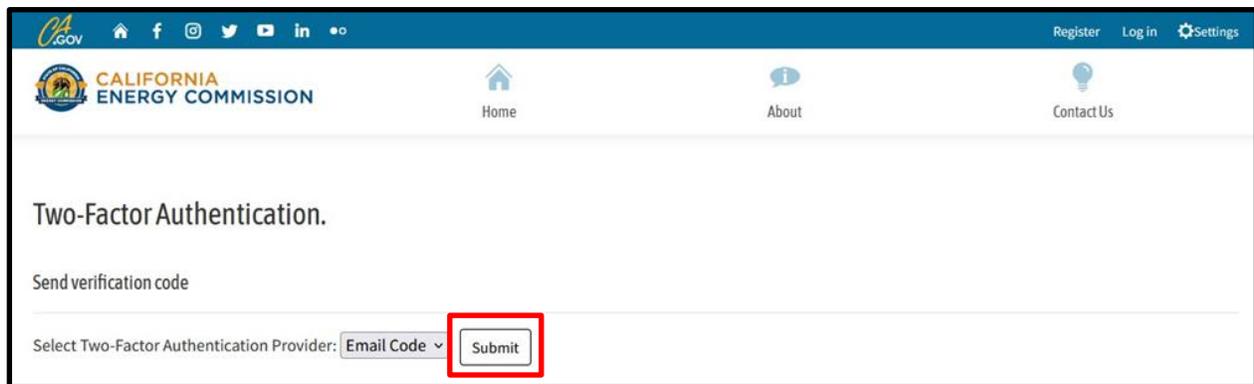
Insert the verification code into the box highlighted below and click the Submit button to login.
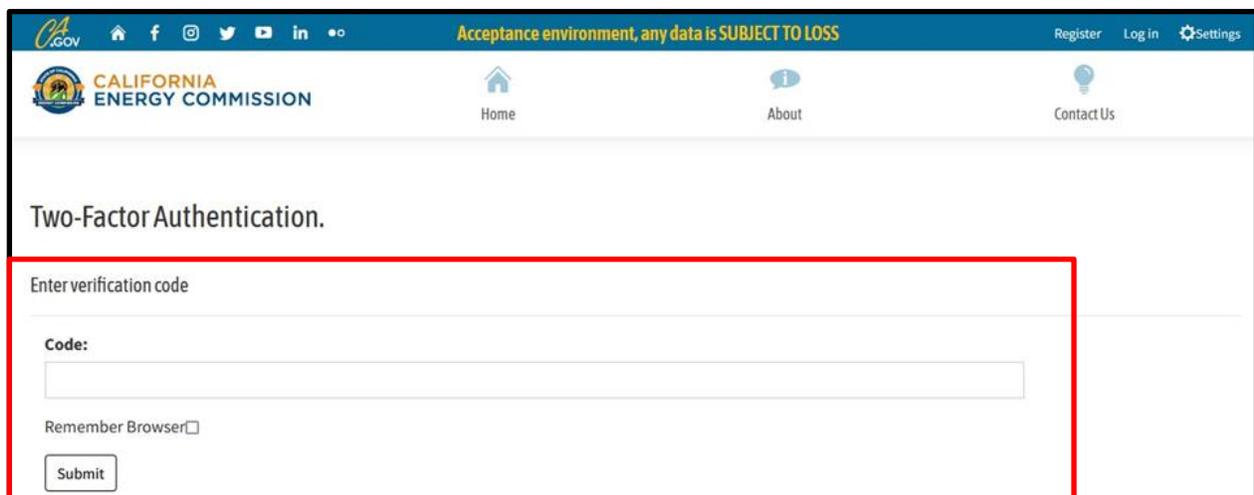
1.2. Creating a Company

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 clicking the Projects icon from the top header once logged into the system.
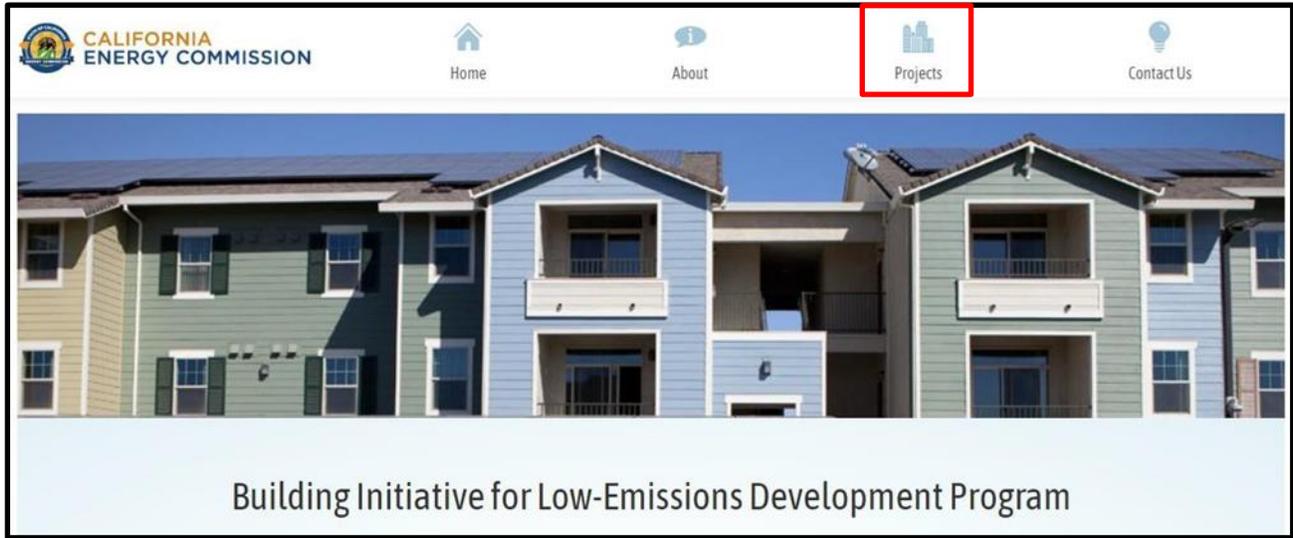
The Projects tab will display a list of existing companies, seen below, in which an applicant may request to Join as described in the following section. If the company you wish to apply for is not already listed, this page also allows for the creation of a new company profile. To create a company, click the HERE button, 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.
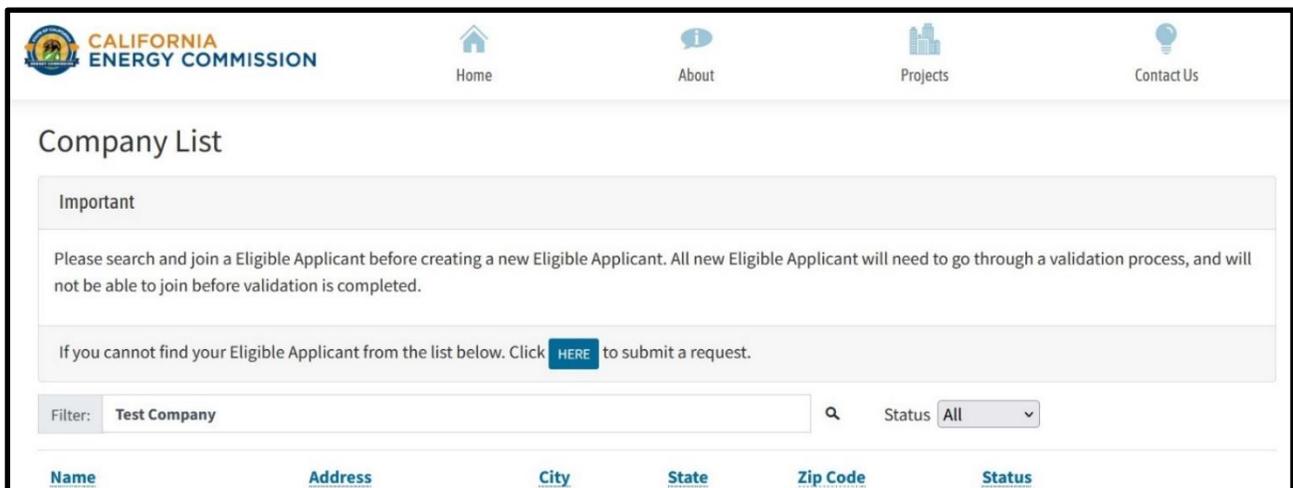
Company Information (All fields are required)

Qualification

Please read the following requirement first
- Response must be "Yes" to question #1
- Years of Experience in Construction must be greater than or equal to **5**

1. To qualify for a BUILD incentive, did the eligible applicant (company, owner, tribal, NGO) develop and received a COO for at least one deed-restricted multi or single family residential property in California?

2. Years of Experience in Construction

3a. Project Address of Qualifying Past Project.

Type in your project address of qualifying past project

0 / 1500

3b. Funding Sources of Qualifying Past Project.

Type in your funding sources of qualifying past project

0 / 1500

3c. Description of Qualifying Past Project.

Type in your description of qualifying past project

0 / 1500

4. Date of Final Certificate of Occupancy

5. Is this the first time that your company/firm has designed and or built an all-electric residential building in California?

If the company meets the initial BUILD Program Guidelines requirements for an eligible applicant, the profile page will then appear.

NOTE: Question #5 decides the company's eligibility for the New Adopter Design Award during the Step 1: Design reservation application.

Input the proper information into the prompts on the profile page and click the Save button when complete. This will send the request to BUILD staff, and they will review the request for approval. Once the company creation request is approved, the applicant will be notified by email and the company will appear on the Company List page.

1.3. Joining a Company

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

Once the company is found, click the Join button to the right side of the page.

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

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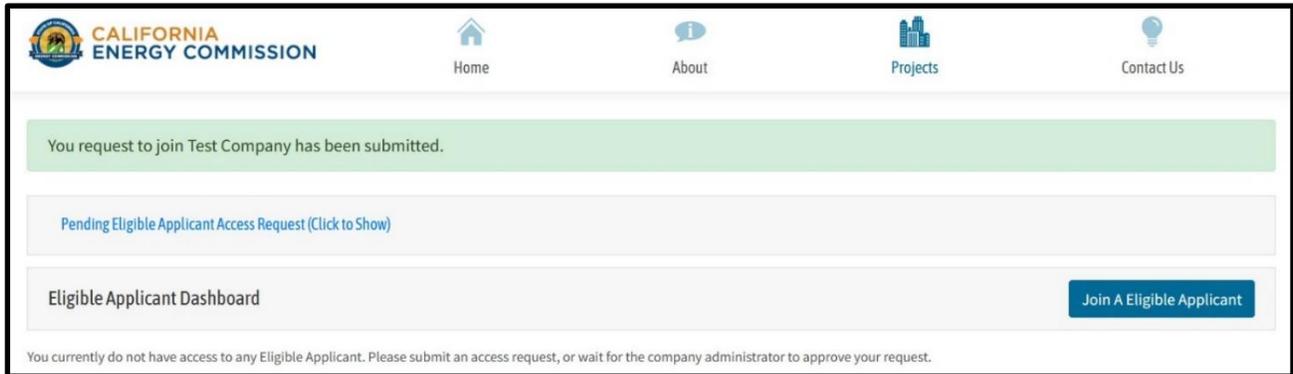
The first applicant to join a company will automatically become a "Company Admin" with the ability to approve additional users.

To approve new users by the Company Admin, navigate to the company dashboard by clicking the Projects icon on the top right of the website.
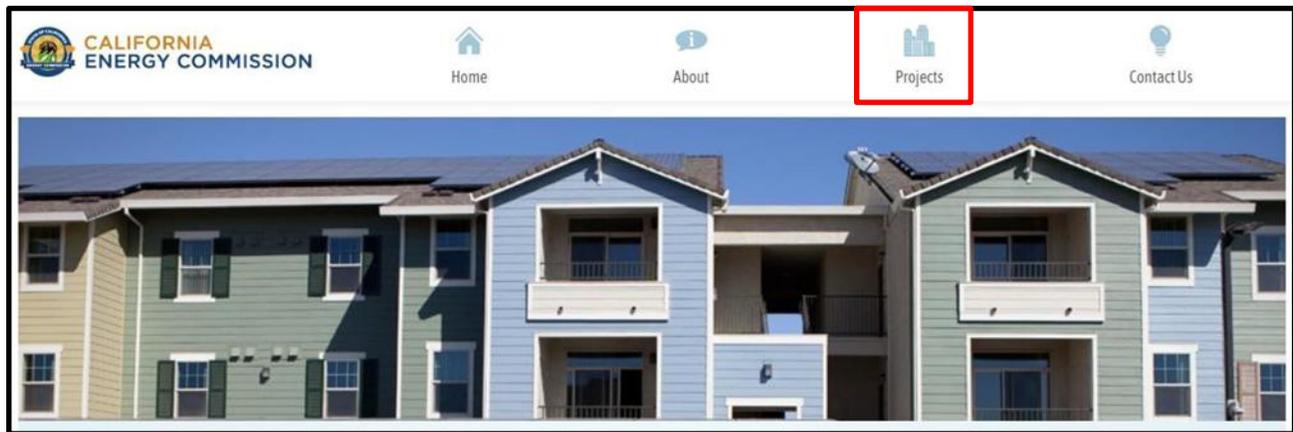
Next, click the Manage Eligible Applicant button to navigate to the company details.
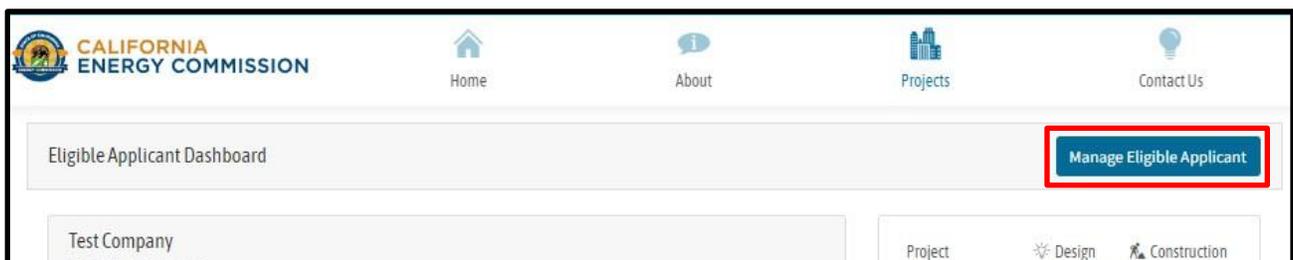
Under the Eligible Applicant Dashboard: Company, Sub Company, and User Access are all managed through this tab. Click the User Access tab to find all company user information.

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

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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., click the Manage Eligible Applicant button from the Eligible Applicant Dashboard.

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

2. BUILD Online Application Submission

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

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

2.1. Overview of the BUILD Reservation Application

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

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

1. **Step 1 Design:** A design reservation is optional, used for projects still in a planning or design stage and without a building permit.
   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.

2.2. BUILD Incentive Application

Once logged into BUILD Online, click the Projects icon 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, click the Project Dashboard button.
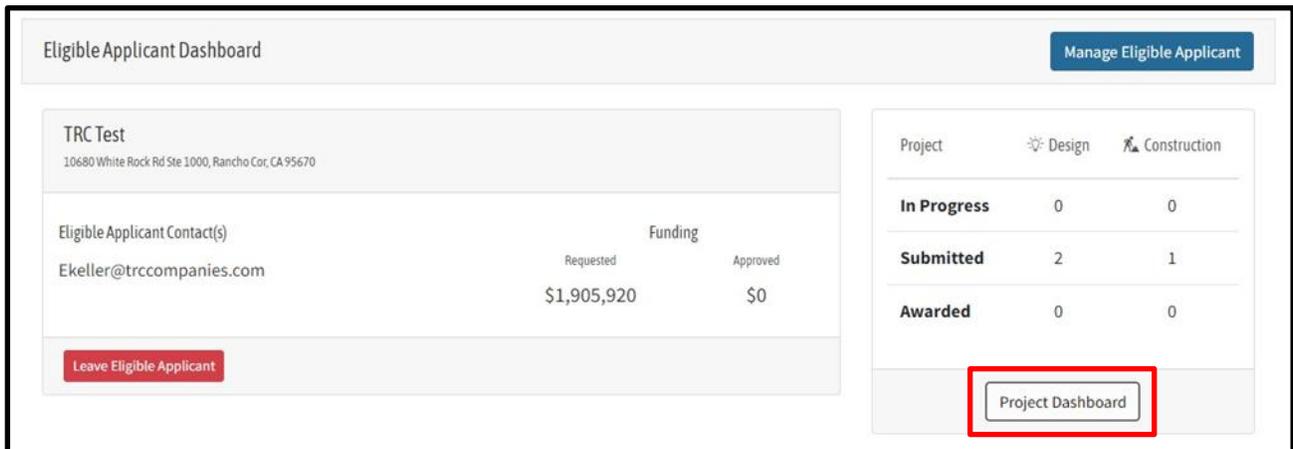
From here, click on the +New Project button on the right side of the webpage. The Project Dashboard also allows users to view existing applications previously submitted or in progress.

To review existing or in progress applications, click the View button.

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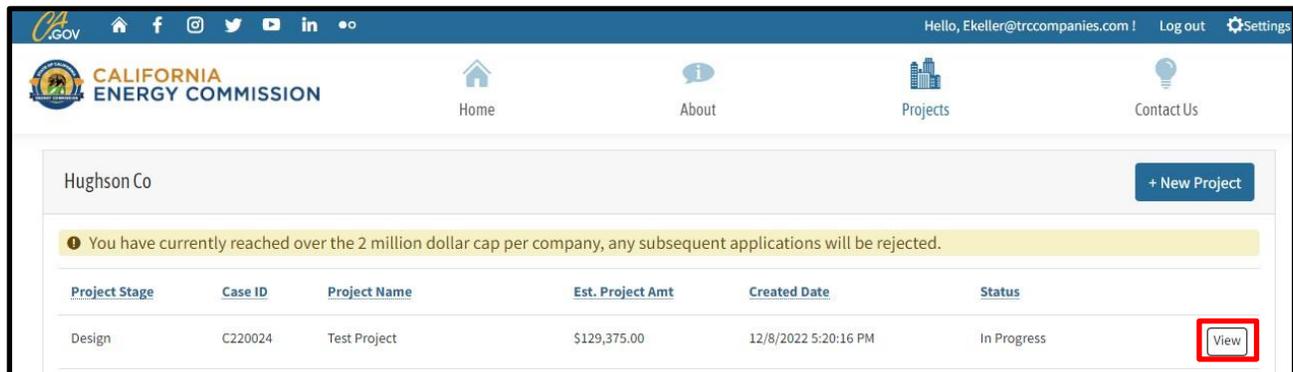
2.2.1. Initial Screening

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 the California Climate Zones webpage at https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/climate-zone-tool-maps-and.

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.

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.

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 see the California Communities Environmental Health Screening Tool 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.

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

The BUILD Case ID is a 7-digit alphanumeric identification. Applicants who submit their reservation application without a BUILD Case ID will receive in their submission confirmation email a 7-digit identification number starting with C (denoting CEC initiation). The example below is a Case ID that began with technical assistance and therefore starts with T (denoting technical assistance initiation).

Project Stage Additional Questions: Use the dropdown menu to indicate if the project has received an approved building permit. If the project has not received a building permit yet, the project is applying for a Step 1: Design reservation, and possibly the new adopter design award. If the project has received a building permit, the project is applying for a Step 2: Construction reservation.

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

Click 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.

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.

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

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

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

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

The BUILD Program Guidelines require funding details, including the amount requested or awarded and the anticipated date for applying to a financing source.

Under the Financing tab, please type in the amount requested or awarded from the selected financing source. Do not enter a dollar sign or commas; these will automatically populate when a number is typed in. Then, click on the calendar icon to select the date of the anticipated financing application date or the applied application date for affordable multifamily housing financing.

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

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

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

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

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

After selecting an option from the dropdown, use the textbox to describe either how the solar photovoltaic will be assigned to the residents, or how the project will otherwise meet the modeled utility cost savings requirement as outlined in the guidelines. When completed, click the Update button to save progress.

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. 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, click the Save as XLSX button in the bottom right corner of the application, to export and save an xlsx file that will be compatible with BUILD Online. **This is essential as other file types are not compatible, resulting in an upload error.**

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

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

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

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

Once all additional 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. Click the Include box to select all BUILD Calculators/CPTs to include in the application. If the Include box is not selected, the incentives for those calculator(s) will not be populated in the incentive totals shown on the Summary tab.

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 click the Select button and choose the file from the device.

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

Successfully uploaded files will appear under Supporting Documents section at the bottom of the page. Use the dropdown menu to select the document type for each uploaded file. Click the Download button to download a copy of the document, or click the Remove button to remove the document from the application.
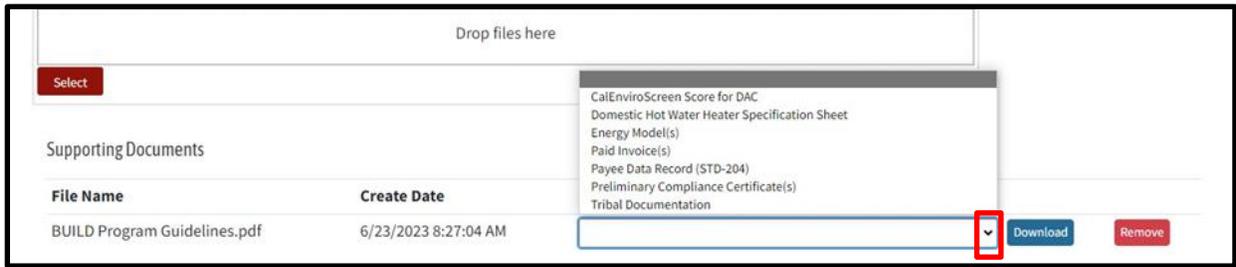
In preparation of submitting the application reference the checklists for Step 1: Design, Step 2: Construction, and Step 3: Completion for a list of documents to upload at each step. These checklists along with the fillable form Payee Data Record is available on the BUILD Incentives webpage by clicking the "Apply for an Incentive" tab to expand the accordion.

2.2.5. Summary and Application Submission

The Summary tab provides the estimated incentive values based on the calculator upload(s). The Summary tab also lists any missing documentation at the top of the page that is still needed to submit the application.
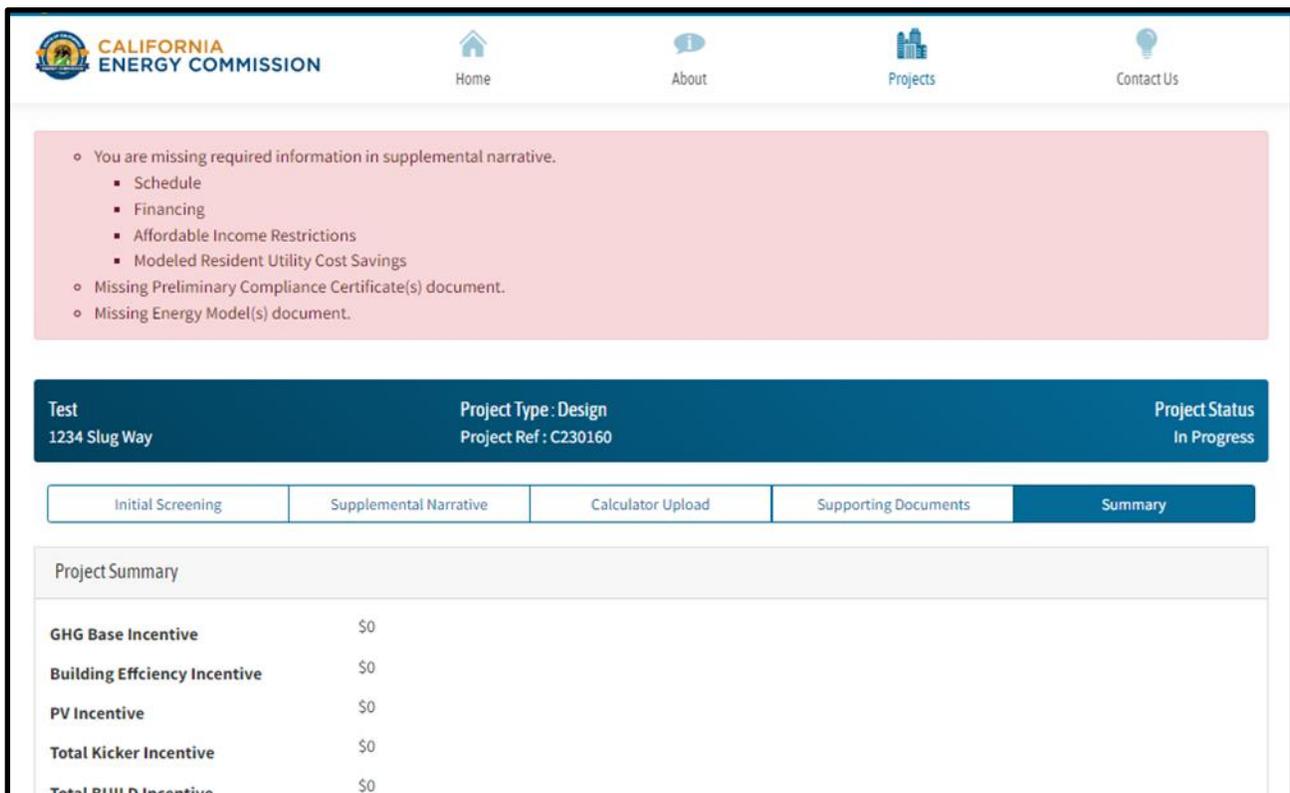
If the project is eligible for the New Adopter Design Award it will be noted on the Summary tab as shown below.

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 Effciency 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 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, click the Submit Project button to complete application submission process.

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: If successful, the designated project contact will receive a confirmation email from the BUILD@energy.ca.gov email address, which includes a BUILD Case ID, date and time of the submission, and the estimated incentive amount requested. You can view the status of the application in the BUILD Online Project Dashboard.

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TEST Environment Message Submission Confirmation of BUILD Step 3 Completion Reservation Transition Application for C260374

BUILD Test System <buildtesting@energy.ca.gov>
To
Thu 2/12/2026 1:34 PM

ⓘ Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear Applicant:

A Building Initiative for Low-Emissions Development (BUILD) Program Step 3 Completion reservation transition application was successfully submitted for C260374, Test Construction for Pending, on 2/12/2026. The incentive amount requested for this application is $49,425. No further action is needed at this time.

BUILD staff reviews applications in the order received. The applicant will be notified if corrections are needed to complete the application for BUILD Staff review.

The BUILD Technical Assistance Provider is available to assist with the application process. If you have any questions and have not applied for technical assistance, the Technical Assistance Application can be found here. If you already have a BUILD technical assistance project manager, please contact them directly.

For more information, please refer to the BUILD Program Guidelines. If you believe that this application has been submitted in error, please reply to this email or send an email to BUILD@energy.ca.gov for assistance.

Thank you,

BUILD Team

You will be notified if applications are incomplete and given ten (10) business days to update their applications. Please complete applications requiring corrections within 30 calendar days. Applications not corrected within 30 days become incomplete and will be cancelled.

NOTE: Once submitted, the application will be in queue, in the order received, for review, approval, corrections, or denial. The submitted application will not be available for modification until it has been reviewed, and the status changed to corrections by BUILD staff. During the application review process, BUILD staff may request additional documentation as part of the review 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

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

Project Extensions: An approved Step 1 Design reservation is valid for 18 months. If submitted in accordance with the procedures in Chapter 6, Section P, a one-time extension of a design reservation for a period no greater than six (6) months will be approved upon the applicant's demonstration that:

a) Any barriers or delays will be resolved within the extension period and the updated project timetable is viable and consistent with the terms within these guidelines.
b) Applicant has applied for low-income housing financing and is awaiting approval, if applicable.
c) A statement that applicant expects to learn of whether their low-income housing financing is approved within the extended period, if applicable.

An approved Step 2 construction reservation is valid for 36 months. If submitted in accordance with the procedures in Chapter 6, Section P.1 a onetime 12 month extension will be granted if the applicant demonstrates that:

a) The extension is necessary due to unforeseen circumstances beyond the applicant's control that are not the fault of, or caused by, the applicant, and
b) The unforeseen circumstances identified have been remedied, and the project timetable is now consistent with the terms within these guidelines and on track to advance to step 3 within the extension period.

Any extension requests beyond 12 months must be considered by the CEC, as discussed in Chapter 6, Section P.2.

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

BUILD Online functionality updates periodically. Please visit the BUILD Webpage to sign-up for the program subscription list where applicants will be notified for major changes to the program guidelines, the CPT forms, or BUILD Online functionality.

2.4. Project Step Transitions

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Once an application is approved, it is eligible to proceed to the next project step of the BUILD Program. The eligibility and documentation requirements is listed in the application checklist document for each step.

For the complete application checklist documents, please visit the BUILD Incentives Webpage and click the "Apply for an Incentive" tab to expand the accordion.

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

To transition the application to the next step. navigate to the Eligible Applicant Dashboard by clicking on the Projects icon at the top of the BUILD Online webpage.

Click the View Projects button to populate all projects associated with the company.

From the Project Dashboard, click the Transition button for the application you wish to proceed to the next step of the BUILD Program.

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 requested document(s) has been uploaded, click the Submit Transition button to proceed to the next step.

Navigate back to the Project Dashboard to verify that a new application with the same Project Name and Case ID. Click the View button to open the newly created application.

BUILD Online will auto-populate information from the previous application. Please review the entire application to ensure all new requirements for each section is completed.

NOTE: Documents and calculator models will not carry over and will need to be reuploaded.

For example, the Initial Screening tab at Step 2 will now require the Certified Energy Analyst (CEA) Name and CEA Number that is currently listed and certified for the applicable Energy Code cycle of the project.

Initial Screening	Supplemental Narrative	Calculator Upload	Supporting Documents	Summary

Project Information

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

Test for waitlist   5

Please provide CEA Name

Michael Winkler

Please provide CEA Number *(Format Example: R12-34-56789 for residential or NR12-34-56789 for non-residential)*

R19-14-30016

Project Address

34 Sand

Project Address (line 2)

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

Los Angeles   San Diego   94104

At Step 3, the Schedule tab will now require information regarding any design modifications (if applicable) for each eligible building's calculator model.

Initial Screening	Supplemental Narrative	Calculator Upload	Supporting Documents	Summary

Schedule   Financing   Affordable Income Restrictions   Modeled Resident Utility Cost Savings

Project Schedule

Were there any building design modifications triggering a Title 24 documentation amendment after the Step 2 Construction application approval?

No

Project Modification Notes

N/A

Site Acquisition or Control Date

3. BUILD Online Claims Submission

Eligible applicants can submit payment claim package using BUILD Online once an incentive application has been approved. All approved applications that are eligible for claims submission are listed on the Claim Dashboard that is only accessible to the Company Admin. The specific claim types available, such as the new adopter design award or progress payments, will be automatically generated based on the project step at the time of approval.

A payment claim package submitted in BUILD Online will be in queue, in the order received, for review, approval, corrections, or denial. Applicant may not modify the submitted payment claim package unless BUILD staff places the claim payment package in corrections status. BUILD staff may request additional documentation as part of the review process.

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 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.

3.1. Overview of the BUILD Payment Claim Request

The BUILD Online payment claim process follows the application reservation stages; it has a Step 1: New Adopter Design Award, Step 2: Construction progress payment, and Step 3: Project Completion final or lump sum payment.

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.

3.4. Supporting Documentation

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

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)](#)
   a. One for the applicant
   b. 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.
3. Worksheet A – Eligible Costs List
   a. Worksheet B – Kicker Incentives
   b. Worksheet C – PV System
4. [Payee Data Record (STD 204)](#)
   a. One for the applicant
   b. One for the assigned party if payment will be made to another entity.
NOTE: Items 4-8: These items need not be uploaded to create a claim if they were already submitted during Step 3: Project Completion application.
5. Proof of Equipment Procurement for kickers and PV installed on the project.
6. PTO (Permission to operate for solar systems).
7. Certificate of Occupancy (or temporary)
8. Recorded Regulatory Agreement/Deed Restriction; Resale restriction or equity sharing agreement
9. Energy Efficiency Verifications (CF-2R, CF-3R).

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

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. All eligible costs to be reimbursed, please combine all paid invoices into a single searchable PDF .For specific instructions on how to make a PDF file searchable using Adobe Acrobat, please visit the webpage https://www.adobe.com/acrobat/hub/make-a-pdf-searchable.html.

To start a payment claim request, the Company Admin will click the Projects icon at the top of the page, then click the "Manage Eligible Applicant" button.
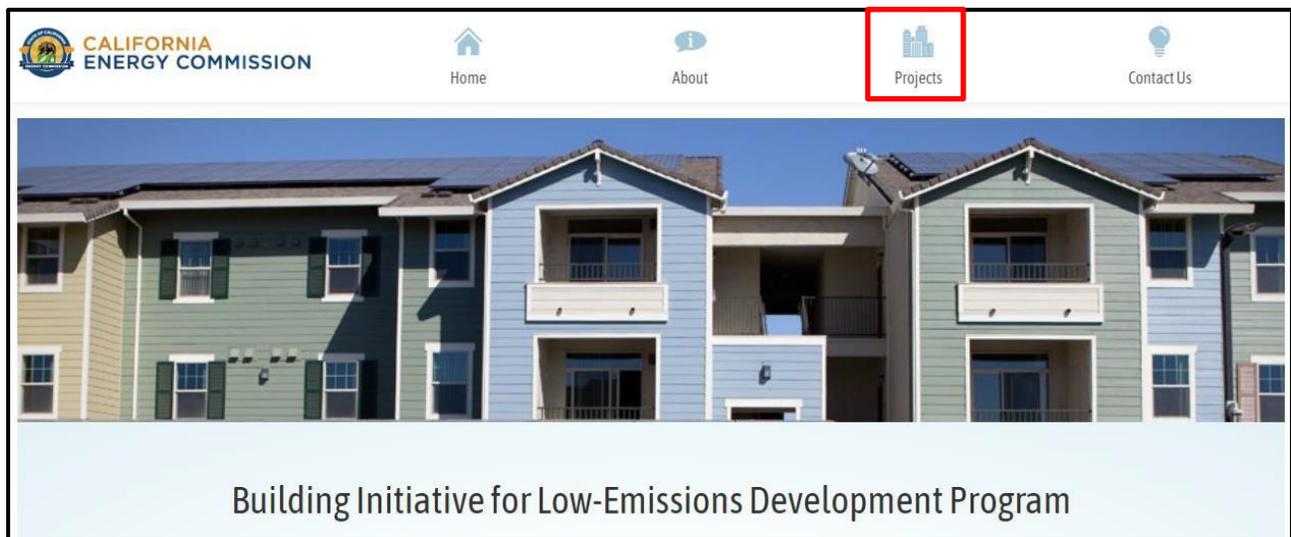
Next click the Manage Eligible Applicant button.
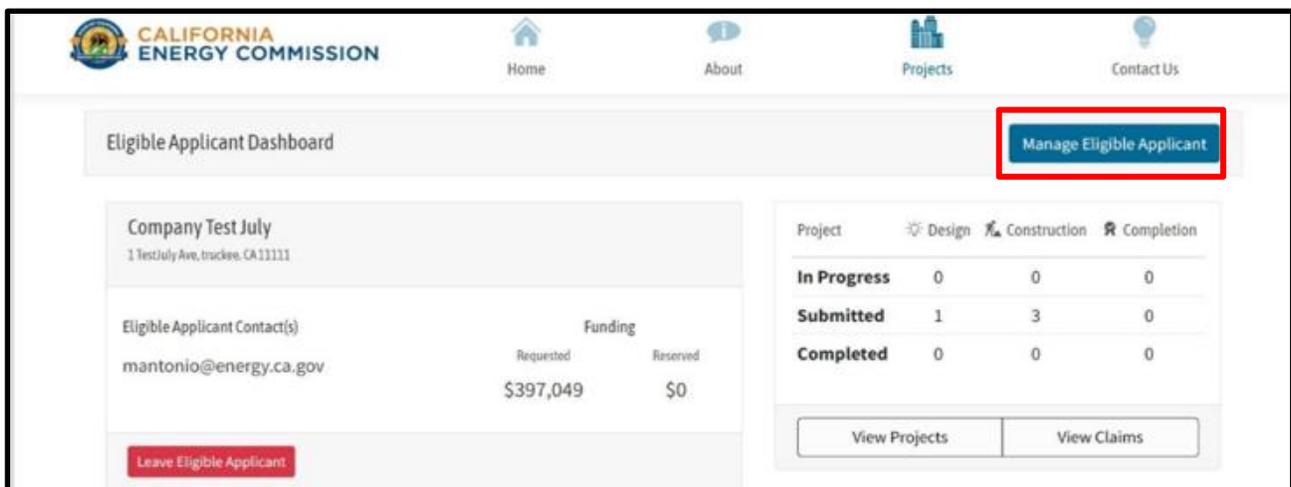
On the Eligible Applicant Dashboard, under the Payee Data Record section, click the "Choose a file" button, select the Payee Data Record (STD 204) from applicant's device, then click the Upload button to complete the action. If applicant does not have a completed Payee Data Record form (STD 204), the form is available at https://www.energy.ca.gov/media/7030. Once the form has been uploaded, click the Projects icon at the top of the page.

Click the View Claims button to go to the Claims Dashboard.

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

Click the Create Claim button to begin creating a BUILD incentives payment claim request.

In the example below, 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.

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
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 click the Select button and choose the file from the device.

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3.5.2. Progress Payment

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

Select No or Yes to the question: 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, then and click the Submit button.

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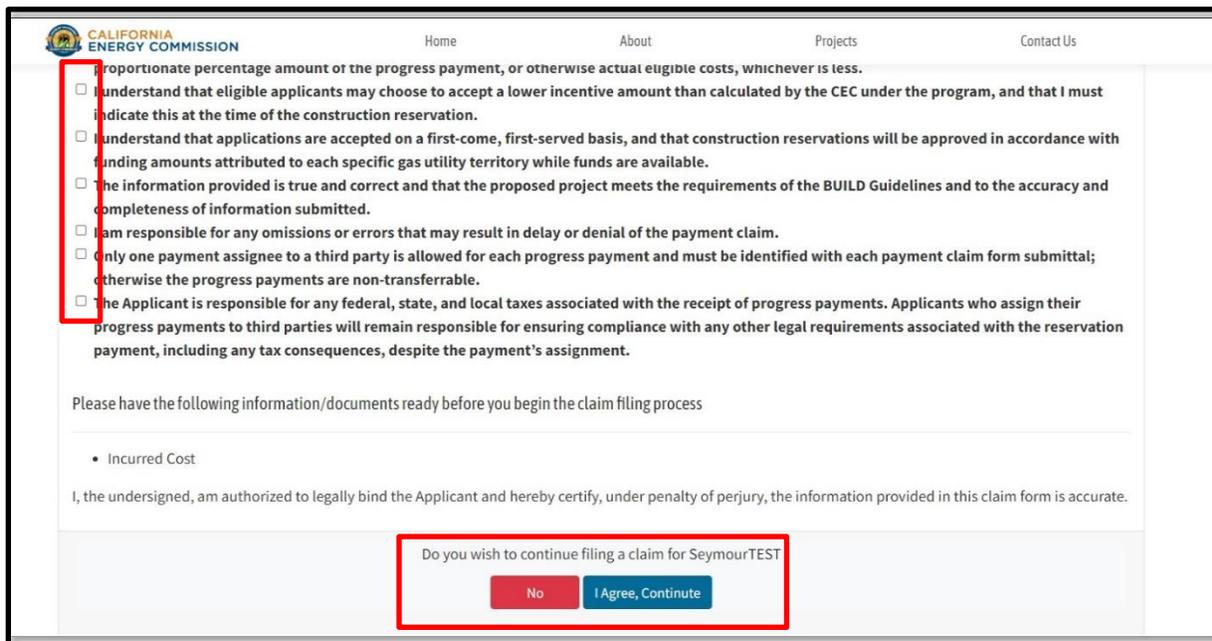
When assigning payment to another party, the information in the payment assignment section must match the information on the assigned party's Payee Data Record (STD 204).

NOTE: The Payee Data Record (STD 204) **must** be uploaded prior to clicking Submit Claim. A Payee Date Record Form (STD 204) is available at https://www.energy.ca.gov/media/7030.

Click the Submit button, once the Progress Payment section is completed and is accurate.

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

A new page will appear with a message at the top, confirming that the claim has been submitted.

Once submitted, the payment claim will be in queue in the order received, for review. 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 from Submitted to Claim Awarded.

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 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.

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.

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.

To start a payment claim request, the Company Admin will click the Projects icon at the top of the page, then click the "Manage Eligible Applicant" button.
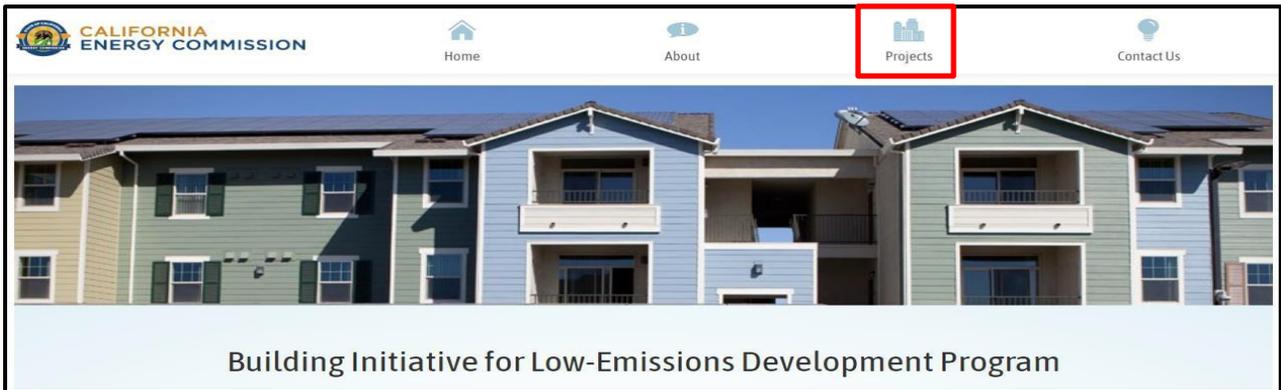
Click the Manage Eligible Applicant button.
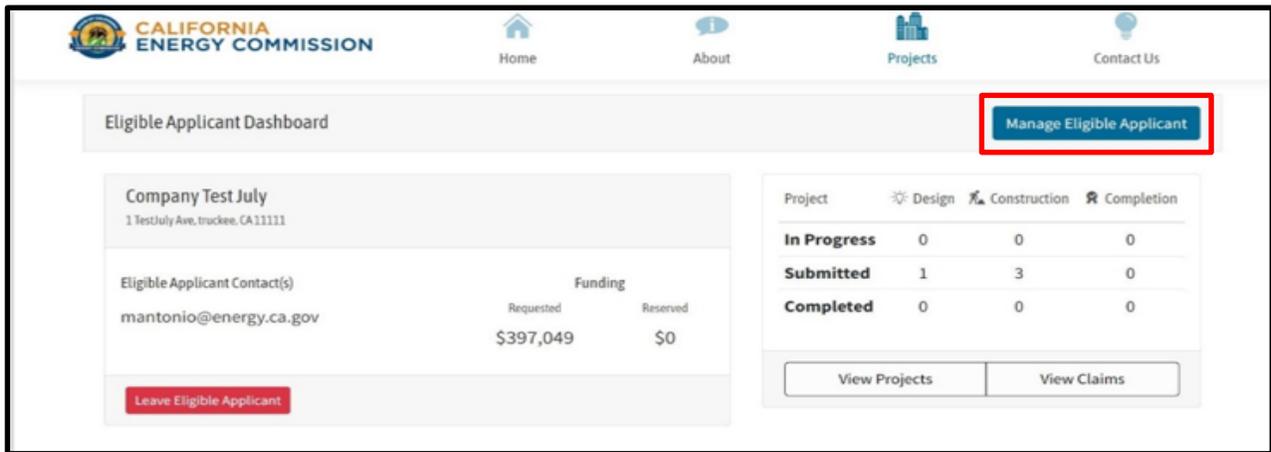
On the Eligible Applicant Dashboard, under the Payee Data Record section, click the "Choose a file" button, select the Payee Data Record (STD 204) from applicant's device, then click on the Upload button. If applicant does not have a completed Payee Data Record form (STD 204), the form is available at https://www.energy.ca.gov/media/7030. Once the form has been uploaded, click the Projects icon at the top of the page.

Once the form is added, click the Projects icon on the top of the page to return to the Eligible Applicant Dashboard.

Click the View Claims button to go to the Claims Dashboard.

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

Click the Create Claim button to begin creating a BUILD incentives payment claim request.

3.6.1. Required Documents

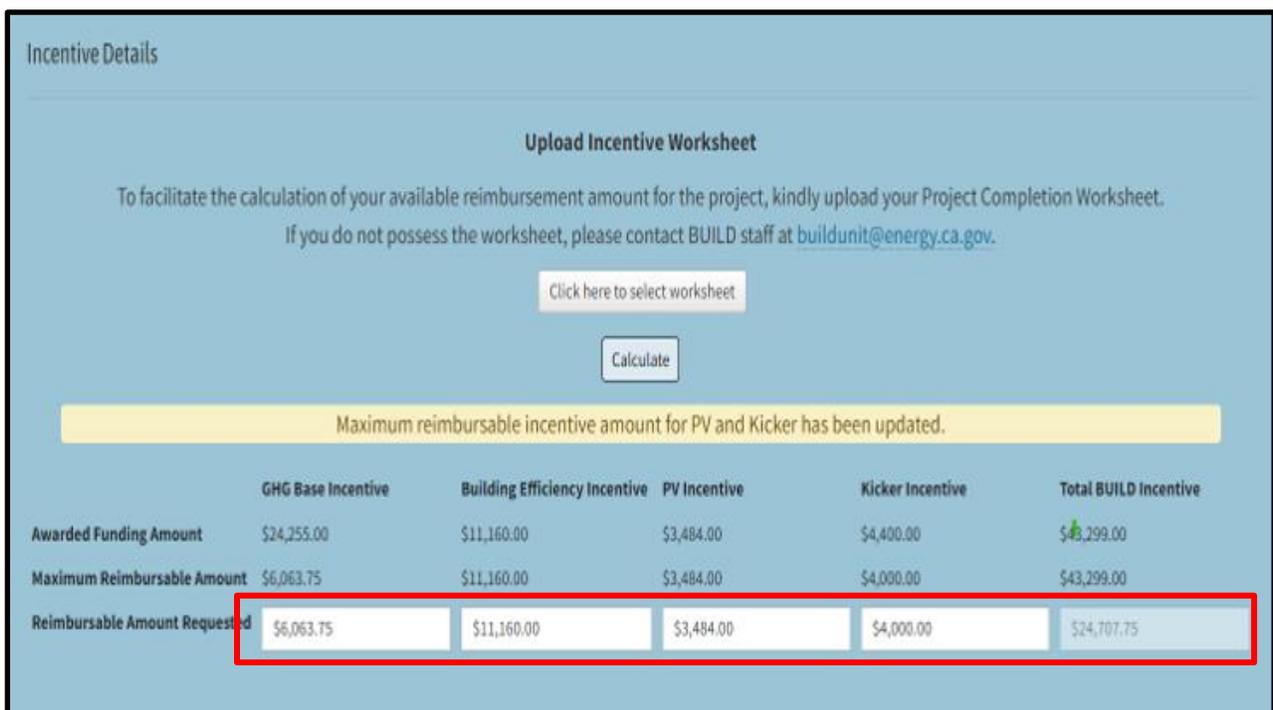Click the "Click here to select worksheet" button and select the payment worksheet from the applicant's device. Click the Calculate button after uploading the completed worksheet.
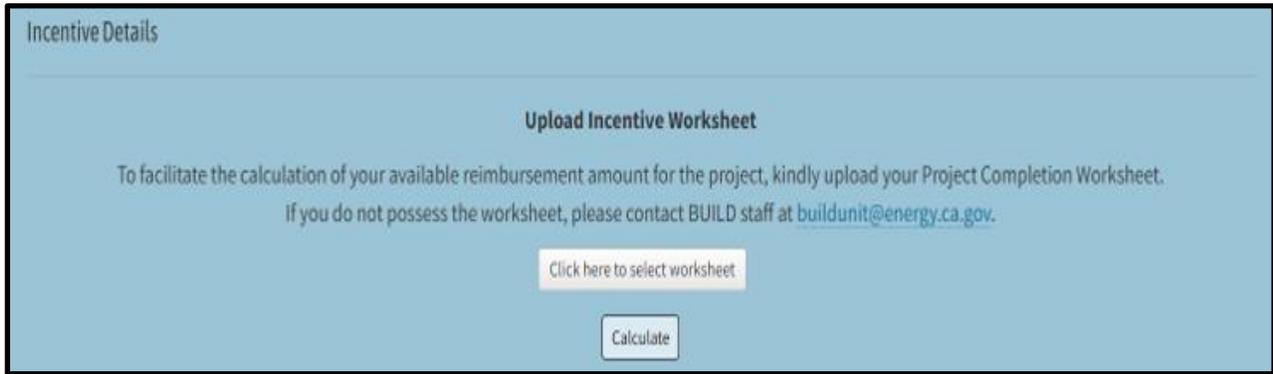
The system will populate the estimated PV Incentive and Kicker incentive from the worksheet itself. The remaining reimbursable incentive (GHG base, Building Efficiency) will be calculated automatically after the applicable worksheets have been uploaded.

If applicant needs to replace the uploaded worksheet, click the "Click here to select worksheet" button to select and upload the new worksheet. Click the Calculate button to re-calculate the amounts.

	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	$6,063.75	$11,160.00	$3,484.00	$4,000.00	$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:
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.

To complete the Final Payment section, please refer to Section 3.5.2 Progress Payment as then instructions are the same.

Click the Submit Claim button, once the Final Payment section is completed and is accurate.

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

A new page will appear with a message at the top, confirming that the claim has been submitted.

BUILD@energy.ca.gov
BUILD Online Instructions

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Once submitted, the payment claim will be in queue in the order received, for review. 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 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	Create Claim

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	View Claim
C240293	24INS119A	Partial25Pct	$15,997.50	9/24/2024 1:46:15 PM	Claim Awarded	View Claim

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

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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.