



# 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 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](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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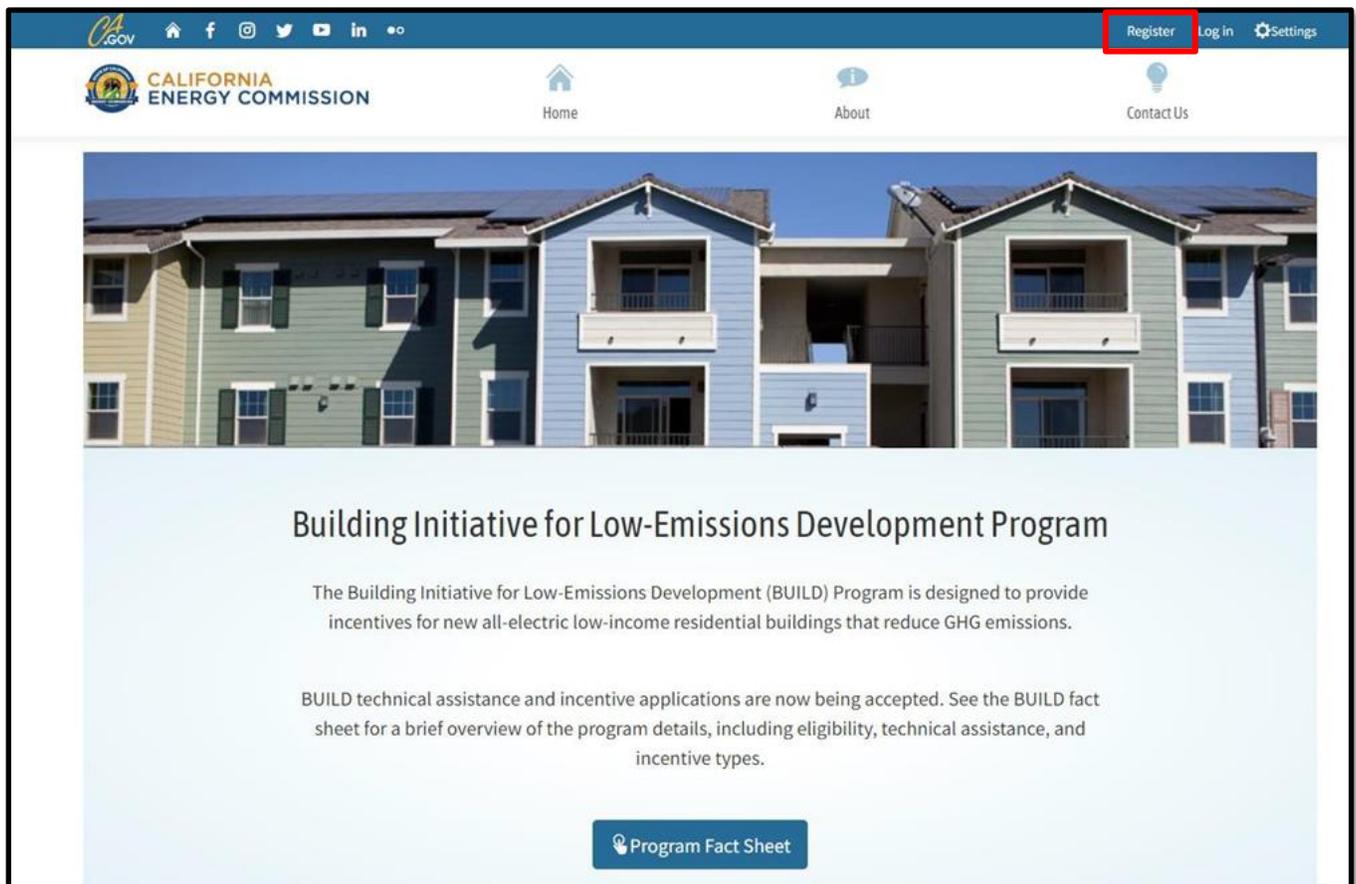
Building Initiative for Low-Emissions Development Program

## 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.

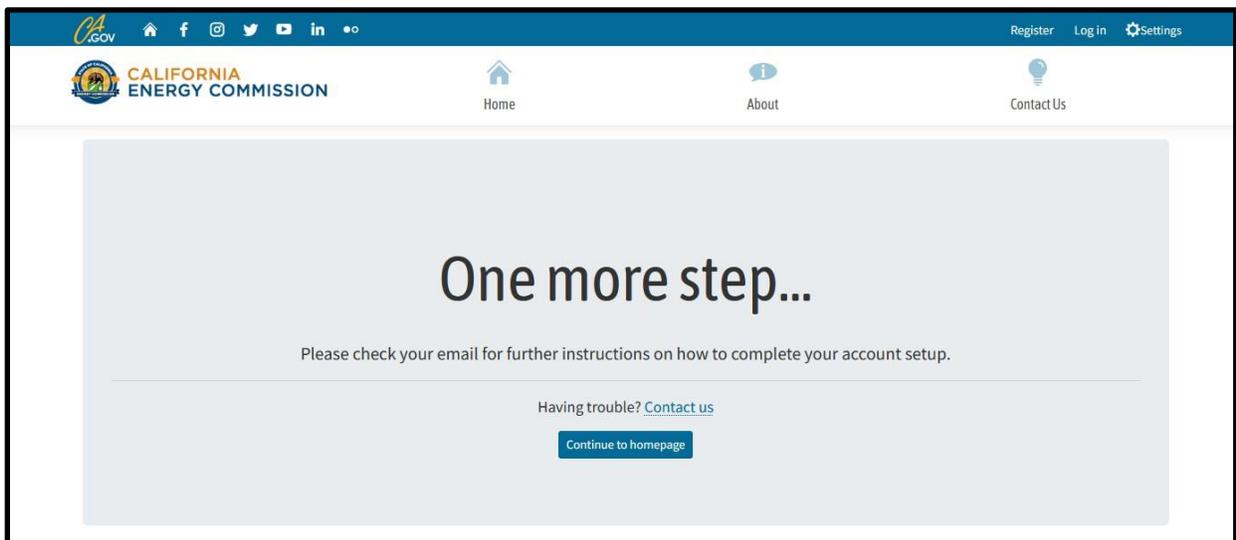


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The screenshot shows the registration page on the BUILD website. At the top, there is a navigation bar with the CA.GOV logo, social media icons, and links for Register, Log in, and Settings. Below this is a secondary navigation bar with the California Energy Commission logo and links for Home, About, and Contact Us. The main content area is titled "Register." and contains a form to "Create a new account". The form includes input fields for 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.

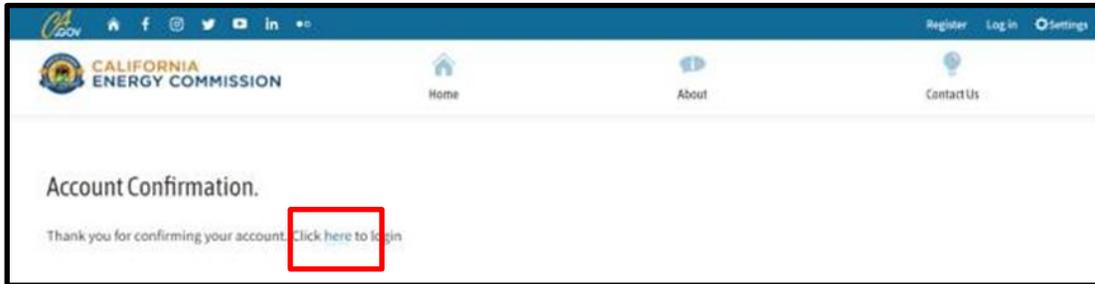




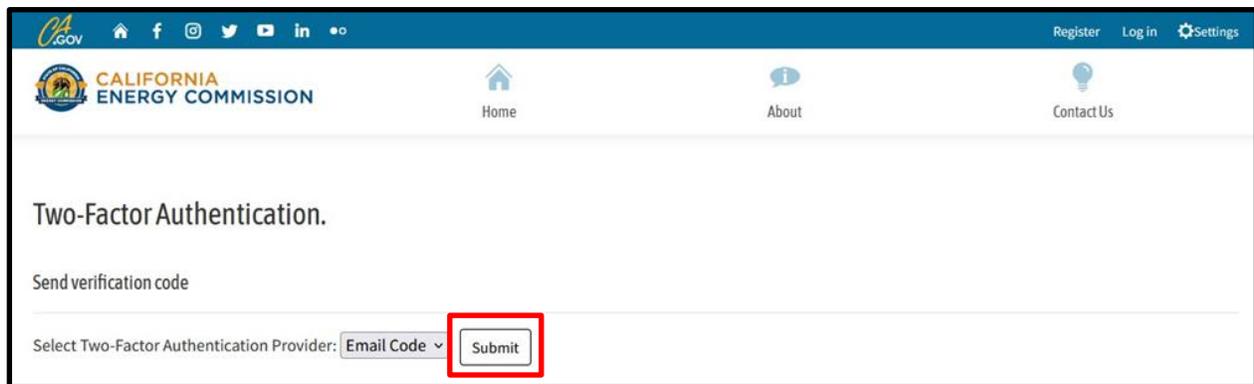
# BUILD

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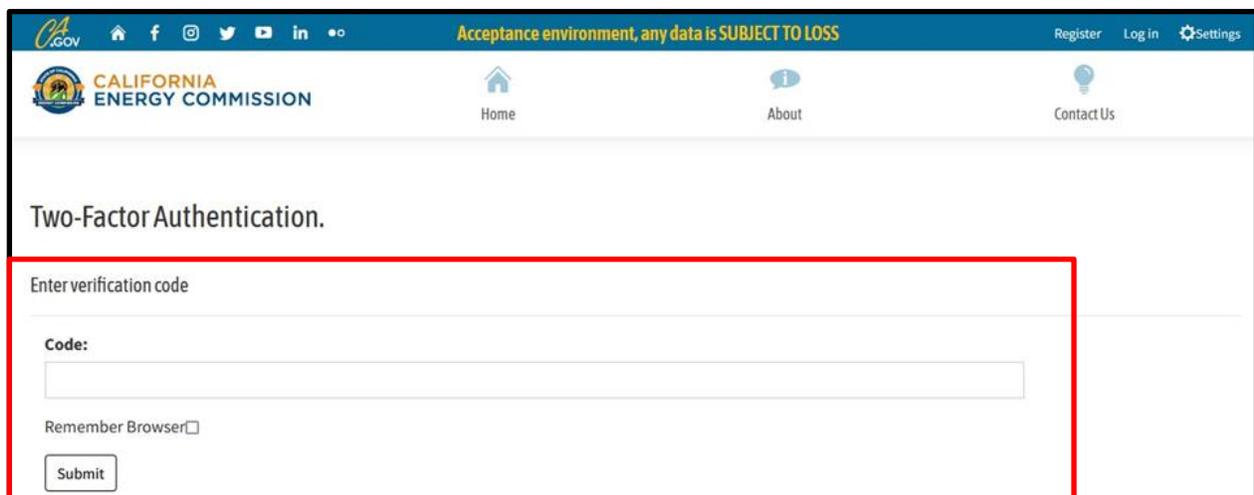
Once the email verification is complete, click the “here” link that is highlighted below.



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.



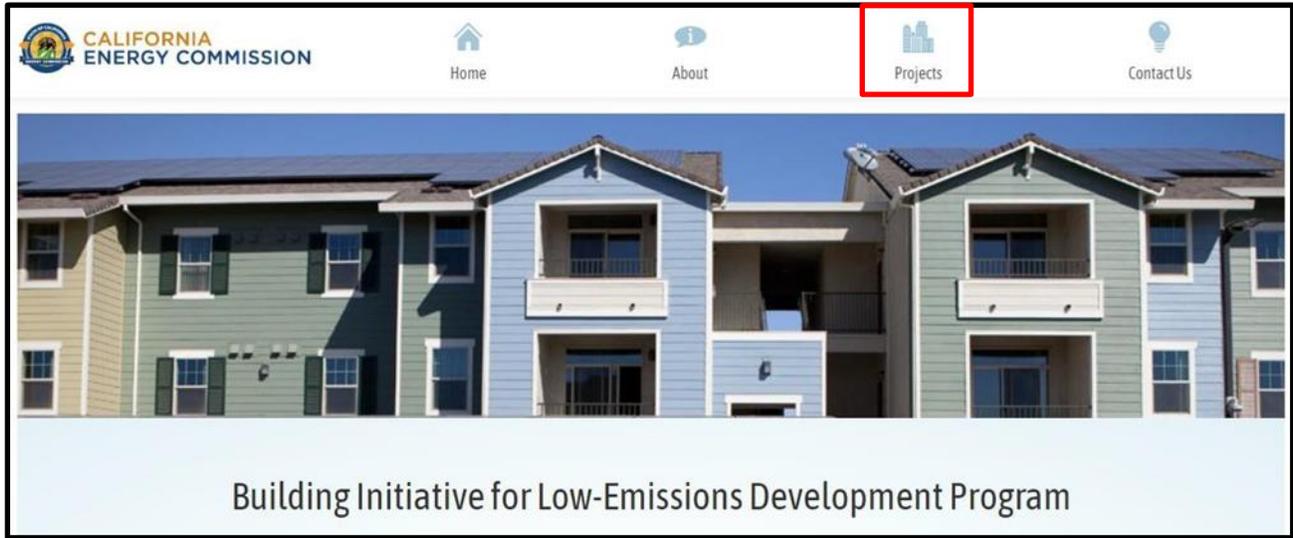


# BUILD

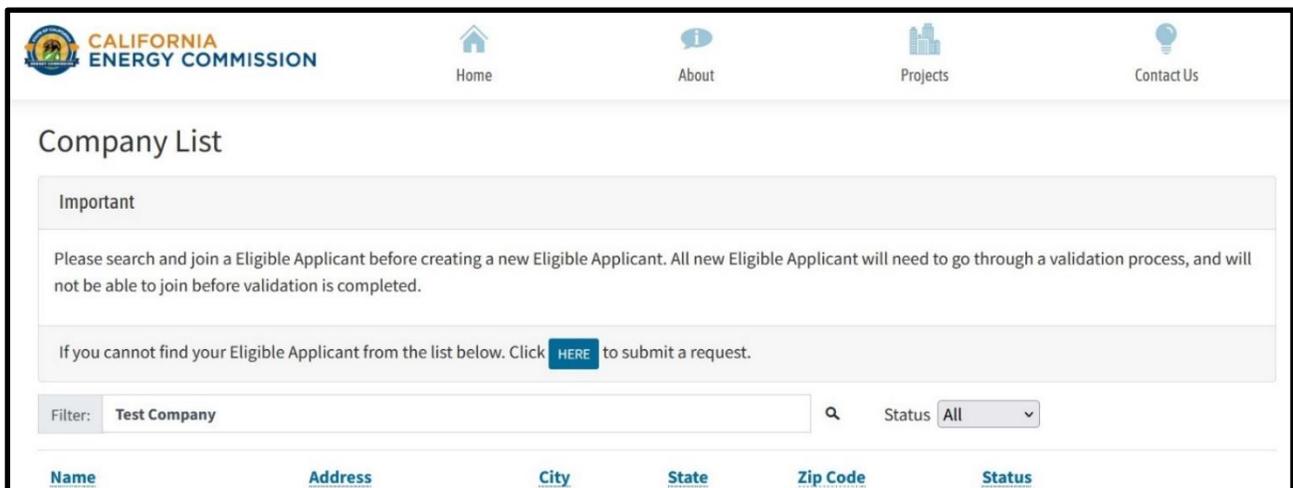
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## 1.2. Creating a Company

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 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.





# BUILD

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### 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.



# BUILD

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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

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.

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 the Confirm Role button.

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

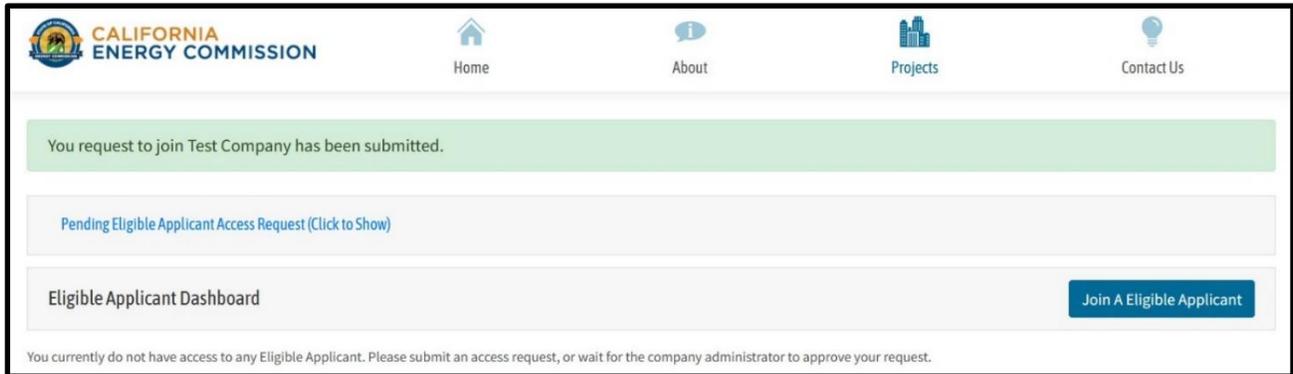
- ✗ Join Multiple Eligible Applicants
- ✓ Create Projects
- ✓ Submit Projects
- ✗ View Others Project
- ✗ Manage Profile
- ✗ Manage User List

### Eligible Applicant Assistant

- ✓ Join Multiple Eligible Applicants
- ✗ View Others Project
- ✗ Create Projects
- ✗ Submit Projects
- ✗ Manage Profile
- ✗ Manage User List

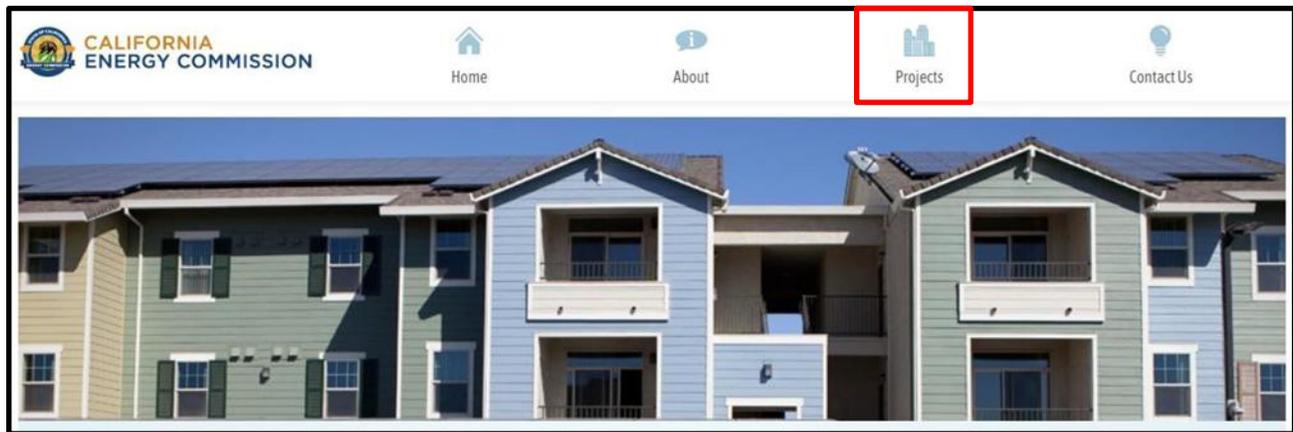


The following will appear once a user role is selected and submitted.

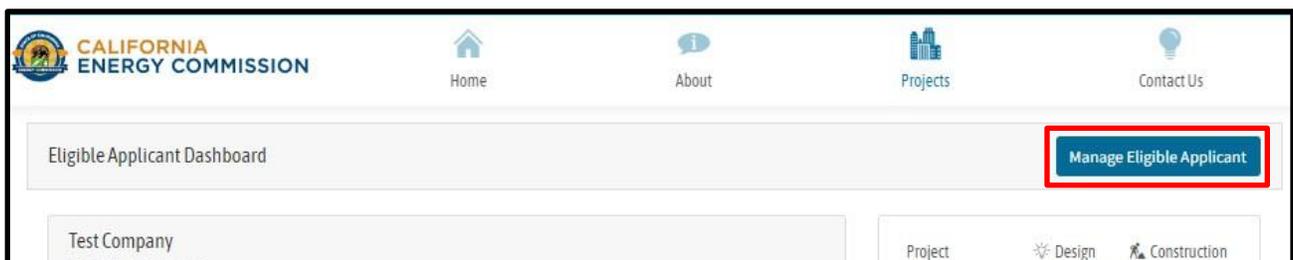


The first applicant to join a company will automatically become a "Company Admin" with the ability to approve additional users.

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.

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 form contains 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 sidebar on the left containing 'Profile', 'Sub Company', and 'User Access'. A search bar is present with the text 'Filter: Enter a user name or user's email'. 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.



## 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.

The screenshot shows the 'Eligible Applicant Dashboard' for 'LAFHBUILDS'. At the top, there are navigation links for Home, About, Projects, and Contact Us. The main header area contains the 'Eligible Applicant Dashboard' title and a 'Manage Eligible Applicant' button, which is highlighted with a red rectangular box. Below the header, the dashboard is divided into two main sections. The left section displays the applicant's name 'LAFHBUILDS', address '7843 Lankershim Blvd, North Hollywood, CA 91605', and contact information 'adomingu@energy.ca.gov'. It also shows a 'Funding' table with 'Requested' and 'Reserved' amounts. A 'Leave Eligible Applicant' button is located at the bottom left of this section. The right section features a 'Project' status summary table with columns for Design, Construction, and Completion. The table shows counts for 'In Progress', 'Submitted', and 'Completed' projects. Below the table are 'View Projects' and 'View Claims' buttons.

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

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

The screenshot shows the 'Eligible Applicant Dashboard' with the 'Applicant Info' sidebar selected. The main content area is titled 'Profile' and contains a form with nine numbered 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), and 9. Zip Code (91605). The 'Update' button at the bottom of the form is highlighted with a red rectangular box.



# BUILD

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## 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

The screenshot shows a navigation bar with five main tabs: 'Initial Screening', 'Supplemental Narrative' (which is highlighted in blue), 'Calculator Upload', 'Supporting Documents', and 'Summary'. Below these are sub-tabs for 'Schedule', 'Financing', 'Affordable Income Restrictions', and 'Modeled Resident Utility Cost Savings'. At the bottom, there is a 'Project Financing' section.

### 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.

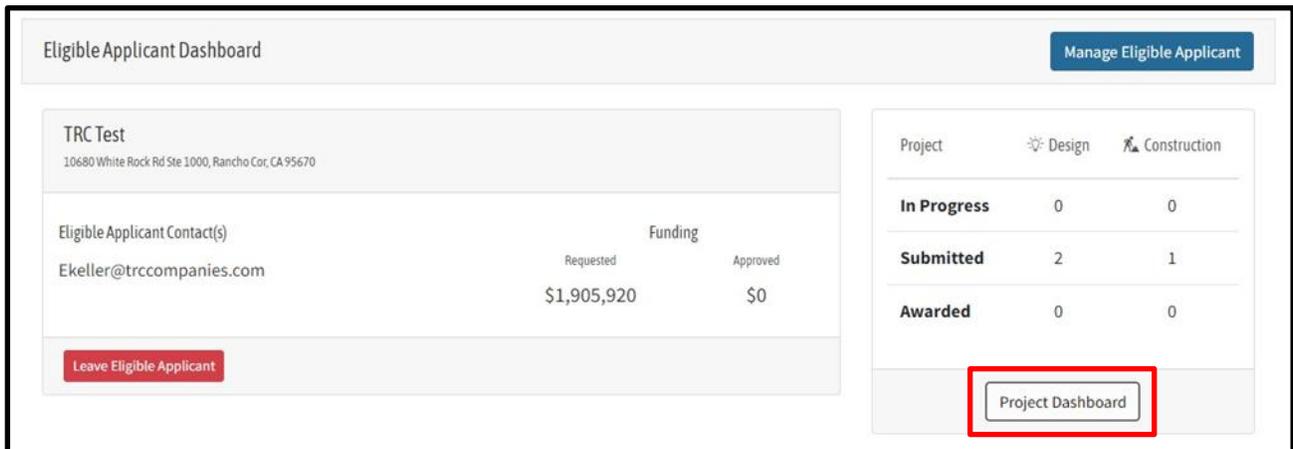


## 2.2. BUILD Incentive Application

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.

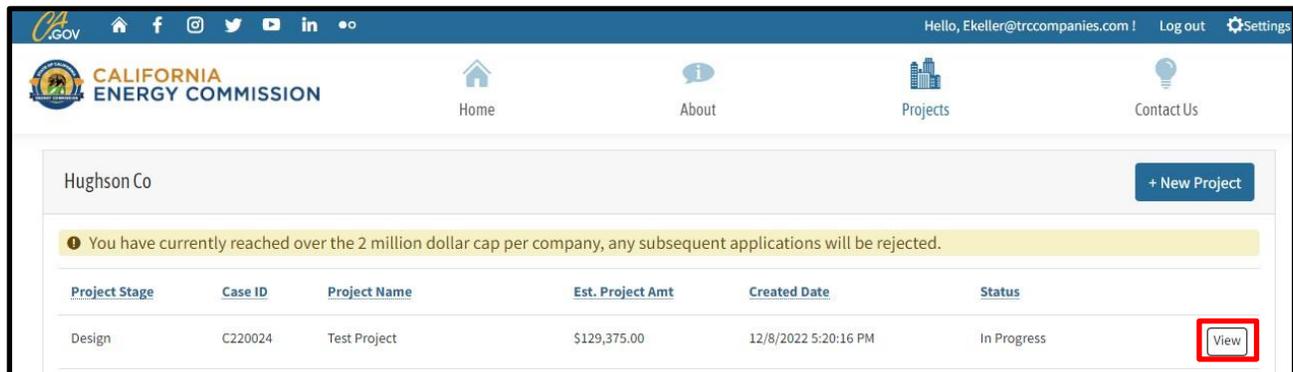


The landing page will show the company or eligible applicant you are associated with, and the incentives requested and approved for the company. On the right side of the page, view a summary of project statuses for the company. To start a new application, click the Project Dashboard button.



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](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>.

The screenshot shows the 'Project Information' section of the BUILD application. 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, the form is titled 'Project Information'. It contains several input fields: 'Project Name' and 'Climate Zone (1-16)' are side-by-side; 'Project Address' is a single wide field; 'Project Address (line 2)' is another wide field below it; 'County' is a dropdown menu; 'City' and 'Zip Code' are side-by-side fields.

**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.

The screenshot shows a single question from the questionnaire: 'Q1. Project and all building associated are all-electric without gas distribution line?'. Below the question is a dropdown menu with 'Yes' selected. A red box highlights the dropdown arrow.

**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](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

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.

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

The screenshot shows a dropdown menu with a red box highlighting the arrow icon on the right side of the menu.

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.

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

The screenshot shows a form with two dropdown menus and two buttons. A red box highlights the 'Update Project' button.



## 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 five 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.

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

The screenshot shows the cost estimation section of the form. It includes three input fields: 'Estimated Temporary/Permanent Certificate of Occupancy Issuance', 'Estimated Predevelopment Phase Total Cost', and 'Estimated Construction Phase Total Cost'. Below these is a larger input field for 'Total Estimated Project Cost'. At the bottom left, there is a blue 'Update' button highlighted with a red box.



**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.

The screenshot shows the BUILD software interface. At the top, there are five main tabs: Initial Screening, Supplemental Narrative (selected), Calculator Upload, Supporting Documents, and Summary. Under Supplemental Narrative, there are four sub-tabs: Schedule, Financing (selected), Affordable Income Restrictions, and Modeled Resident Utility Cost Savings. Below the sub-tabs, there is a section titled "Project Financing" with a red box around the "+ Add Project Financing Record" button. At the bottom left, it says "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 select one of the available options from the dropdown menu. For low-income single-family residences, select Not Applicable.

The screenshot shows the BUILD software interface with the dropdown menu for "Affordable Multifamily Housing Financing Source" open. The dropdown menu lists the following options: 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.), and Not Applicable. A red box highlights the dropdown arrow. Below the dropdown menu are "Save" and "Cancel" buttons.

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.



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.

**Award Date**

Save Cancel

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

**+ Add Project Financing Record**

Affordable Housing Financing Source	Amount requested/awarded
CTCAC (California Tax Credit Allocation Committee) - 4%	\$300,000.00

Edit 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.

The screenshot shows the 'Supplemental Narrative' section of the BUILD application. The 'Affordable Income Restrictions' tab is selected. Under the heading 'Project's Affordable Income Restrictions', there is a field for 'Length of Term of The Income Restrictions (>=15 Years)' with the value '15' entered. Below this field is a blue 'Update' button, which is highlighted with a red rectangular box.

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.

The screenshot shows the 'Affordable Income Restrictions' tab for a single-family development. It includes several fields: 'Length of Term of The Income Restrictions (>=15 Years)', 'Resale Restriction' (a dropdown menu), 'Equity Sharing Agreement' (a dropdown menu), 'Public Entity providing housing to lower income households - \_\_\_\_\_ (fill in Public Entity name)', 'Nonprofit 501(c)(3) Entity providing housing to lower income households \_\_\_\_\_ (fill in Nonprofit name)', and 'Eligibility criteria for potential homebuyers'. A blue 'Update' button at the bottom left is highlighted with a red rectangular box.



**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

**The projects' residents will pay their individual electricity bills**

Yes, residents will pay their respective/individual electricity bills, please describe how will PV benefit will be assigned

No, please describe the type of housing provided that exempts the project from meeting the modeled resident utility cost savings requirement  
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, 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 Modeled Resident Utility Cost Savings

**The projects' residents will pay their individual electricity bills**

Yes, residents will pay their respective/individual electricity bills, please describe how will PV benefit will be assigned

**Notes**

The project will be enrolled in a virtual net energy metering agreement where PV will be allocated to each unit

Update



### 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.**

**Custom Path Tool**

Low-Rise Multifamily Residential (1-3 stories)  
Version 2b.4.0-C  
For CBEC-Res 2022.2.1+, CBEC 2022.2.1+, EnergyPro 9.1+  
2/26/2026 14:59

**Legend**

- Applicant Input
- Calculated Values
- Calculated Incentives
- Error (select value in drop down menu)

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

**Project Information**

Project Name: Homekey Hacienda Heights  
 Building Name: Main  
 Project Address: 1172 S 7th Ave  
 Project Zip Code: 91745  
 Check this box if all tenants will not pay electric utility bills, such as Master Metered building

Select Climate Zone	Select Gas Utility	Select Electric Utility	Total Conditioned Residential Floor Area	No. of Stories Above Grade	No. of Stories Below Grade	Total No. of Units SingleFamily1	Total No. of Bedrooms
CZ	Gas Utility	Elec Utility	sq ft				
9	SGO	SCE	22,969	2	0	112	112

**Laundry**

Central Laundry  
(Yes/No)  
Yes

**DHW**

Central Water Heating (Yes/No)  
Yes

**PV System**

Minimum PV size to achieve compliance  
kWDC  
0.00  
 Check box if using SMUD SolarShares

**Compliance**

% Better Than T24 Used For Permit  
5.0%

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

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

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

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

**Step 2: Press the Calculate button.**

Calculate

**Step 3: Confirm your project meets the program's modeled resident utility cost savings requirement.**

Project meets modeled resident utility cost savings requirements: YES

NOTE: Additional building enhancements and/or PV allocated to tenants is needed to meet the programs modeled resident utility cost 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:	38.30 kW DC
Estimated PV from code requirement:	0.00 kW DC
Estimated PV eligible for the incremental PV incentive:	38.30 kW DC

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

**As Modeled**

Monthly Modeled Resident Utility Cost Difference = -\$12.21  
 Modeled Utility Cost Savings = -18%

**As Modeled with BUILD Required PV**

Monthly Modeled Resident Utility Cost Difference = -\$1.34  
 Modeled Utility Cost Savings = 5%

**Step 4: Review results and estimated incentive amount.**

Use the print button for a digital copy of your results and attach to your application.

Better than Title 24 from Step 1	9.0 %
Estimated Avoided GHG of Building	52.30 MT per year

**Incentive Calculation**

GHG Base Incentive over 30 years (\$150/MT)	\$ 235,350	*based on avoided GHG x 30 years
Increased Building Efficiency Incentive (up to \$1000/bedrm)	\$ 100,800	*based on % better than Title 24
Incremental PV Incentive (\$1.30 per watt)	\$ 49,790	*based on incremental PV in Step 2
Total Kicker Incentive	\$ 0	*based on results from Step 1a
<b>Total BUILD Incentive</b>	<b>\$ 385,940 per building</b>	
	<b>\$ 3,446 per bedroom</b>	

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 click the Select button, to choose the file from the device.



Initial Screening	Supplemental Narrative	<b>Calculator Upload</b>	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 <span>Edit</span> <span>Delete</span>

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.



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. click the Save button to save progress.

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

No anticipated restricted affordability level information

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.

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"/>

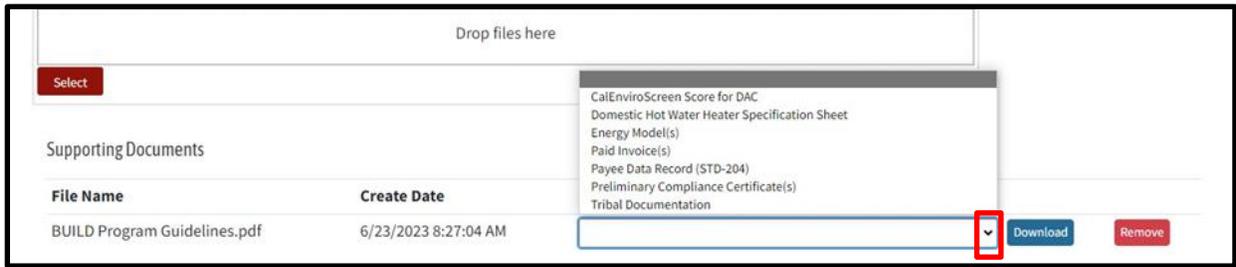


## 2.2.4. Supporting Documents

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 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.

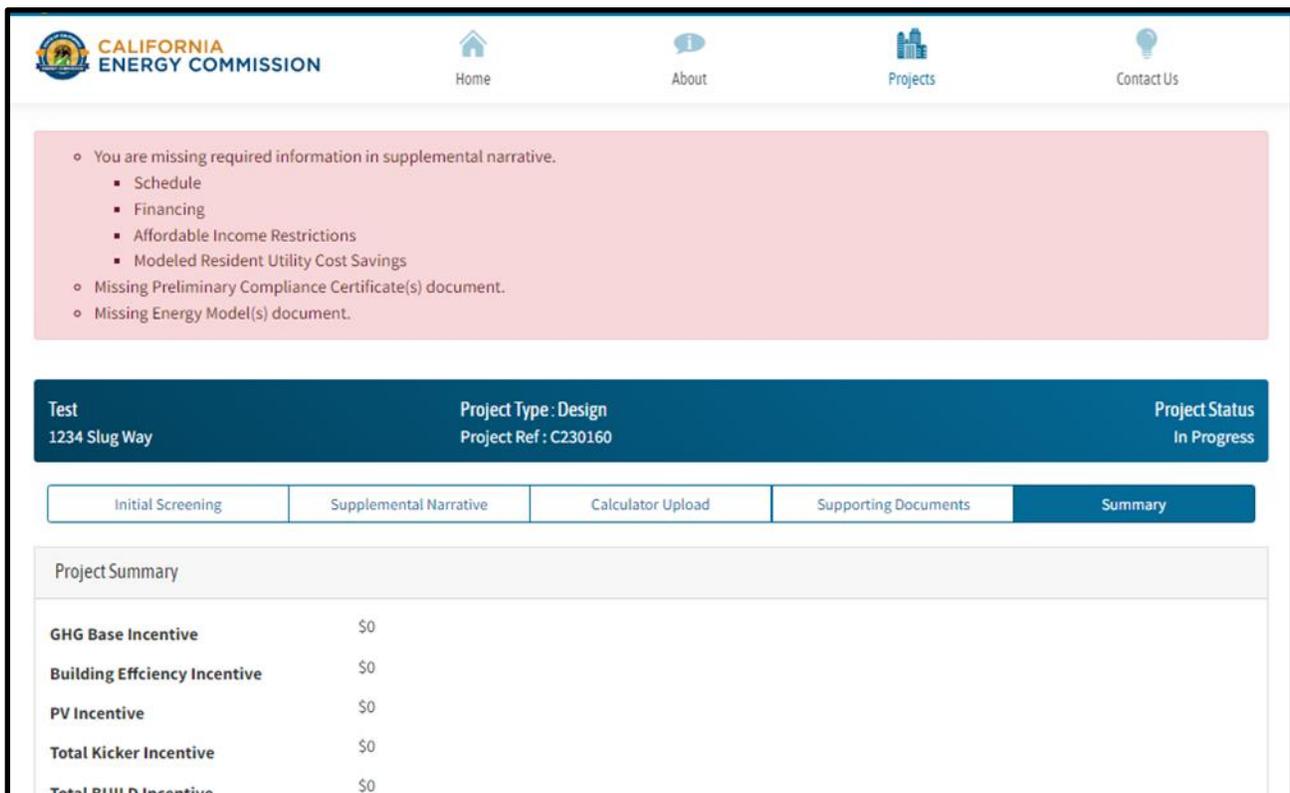
Successfully uploaded files will appear under Supporting Documents section at the bottom of the page. Use the dropdown menu to select the document type for each uploaded file. Click the Download button to download a copy of the document, or click the Remove button to remove the document from the application.



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.



# BUILD

Building Initiative for Low-Emissions Development Program

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

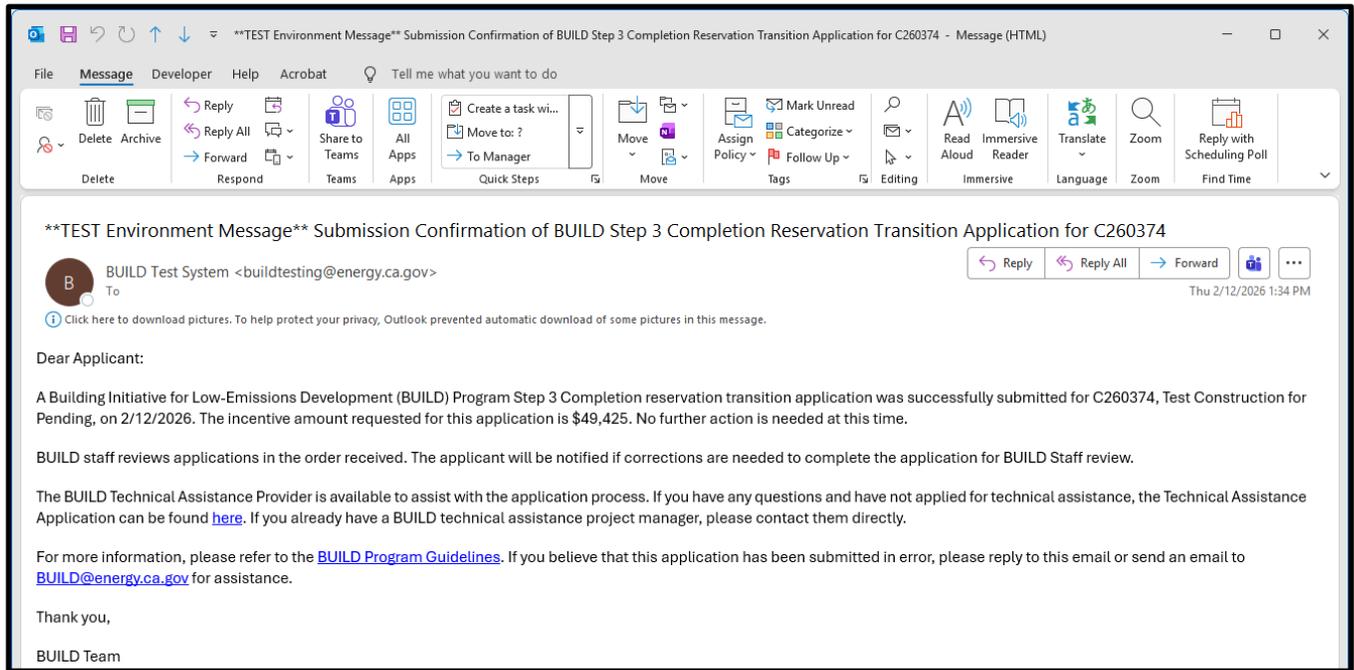
Project Contact Information

▼

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](mailto: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.



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.



## BUILD

Building Initiative for Low-Emissions Development Program

### 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](mailto: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 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.

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

XX

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.

**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.

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.

Eligible Applicant Dashboard Manage Eligible Applicant

**Test Company**  
16935 West Bernardo Dr STE238, San Diego, IN 92101

Eligible Applicant Contact(s) Funding

	Requested	Reserved
steven.van@energy.ca.gov	\$197,520	\$119,990

Leave Eligible Applicant

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

View Projects View Claims

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

CALIFORNIA ENERGY COMMISSION Home About Projects Contact Us

Test Company + New Project

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	<span>Transition</span> <span>View</span>

**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.



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

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>

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				
<b>Project Name</b>		<b>Climate Zone (1-16)</b>		
Test for waitlist		5		
<b>Please provide CEA Name</b>				
Michael Winkler				
<b>Please provide CEA Number (Format Example : R12-34-56789 for residential or NR12-34-56789 for non-residential)</b>				
R19-14-30016				
<b>Project Address</b>				
34 Sand				
<b>Project Address (line 2)</b>				
<b>County</b>		<b>City</b>	<b>Zip Code</b>	
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				
<b>Were there any building design modifications triggering a Title 24 documentation amendment after the Step 2 Construction application approval?</b>				
No				
<b>Project Modification Notes</b>				
N/A				
<b>Site Acquisition or Control Date</b>				



# BUILD

Building Initiative for Low-Emissions Development Program

## 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.

Claim Dashboard for TestCompany

Qualifying Projects					
Case ID	Project Stage	Project Name	Est. Project Amt	Submitted Date	
C250100	Design	Step1Project1	\$422,101.00	9/11/2025 1:39:00 PM	<a href="#">Create Claim</a>
T250200	Construction	Step2Project1	\$522,073.00	9/11/2025 10:50:00 AM	<a href="#">Create Claim</a>
T250201	Construction	Step2Project2	\$655,540.00	9/11/2025 11:05:00 AM	<a href="#">Create Claim</a>

Claims						
Case ID	Claim Reference	Claim Type	Claim Amount	Created Date	Status	
C250300	25INP122A	LumpSum	\$592,968.00	8/18/2025 11:37:10 AM	Correction	<a href="#">View Claim</a>

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](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).



## **BUILD**

Building Initiative for Low-Emissions Development Program

### **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.



# BUILD

Building Initiative for Low-Emissions Development Program

## 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](mailto:BUILD@energy.ca.gov).



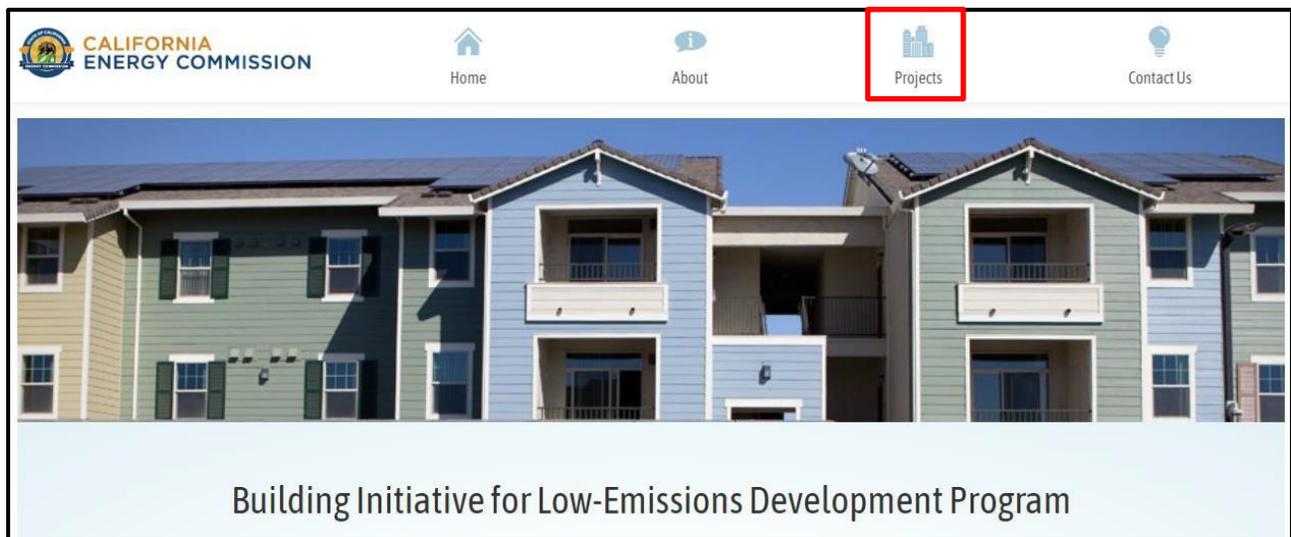
# BUILD

Building Initiative for Low-Emissions Development Program

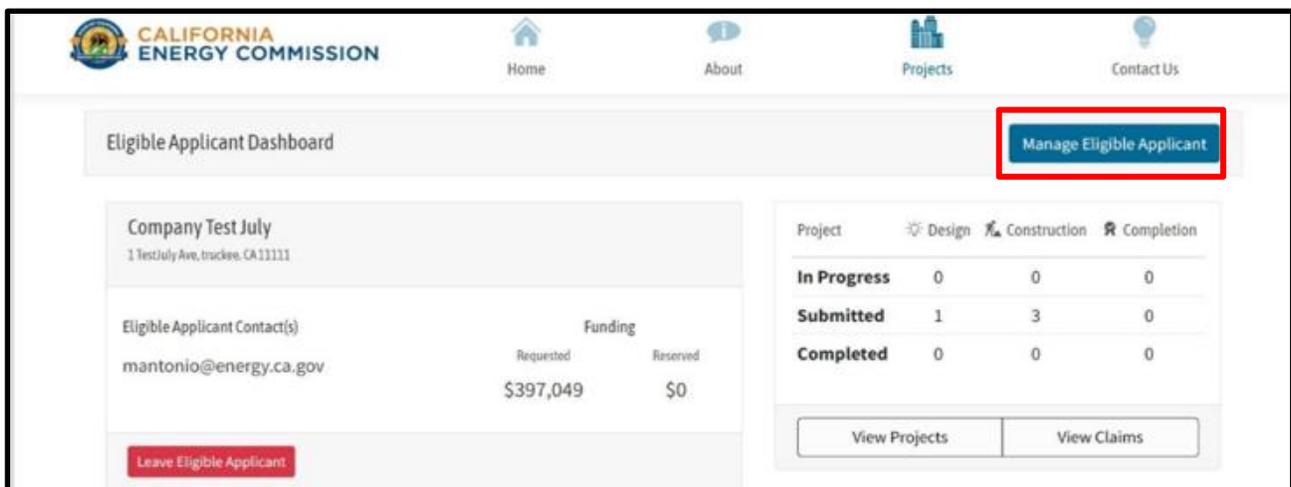
## 3.5. Payment Claim Request for New Adopter Award or Step 2: Construction

Please have all supporting documentation for the payment claim request prior to logging in 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.





# BUILD

Building Initiative for Low-Emissions Development Program

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.

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](#)

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

CALIFORNIA ENERGY COMMISSION

Home About Projects Contact Us

Eligible Applicant Dashboard [Manage Eligible Applicant](#)

Seymour  
Seymour, west sac, CA 95691

Eligible Applicant Contact(s)

	Funding	
	Requested	Reserved
mantonio@energy.ca.gov	\$376,780	\$226,068
calleagh.turner@gmail.com		

[Leave Eligible Applicant](#)

Project	Design	Construction	Completion
In Progress	0	0	0
Submitted	0	5	0
Completed	0	0	0

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

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.

Claim Dashboard for Company Test July

Qualifying Projects

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>



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.

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

### 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.

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.

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

Progress Payment

Is payment assigned to another party?  

No

Yes

**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).

Is payment assigned to another party? Yes v

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)**



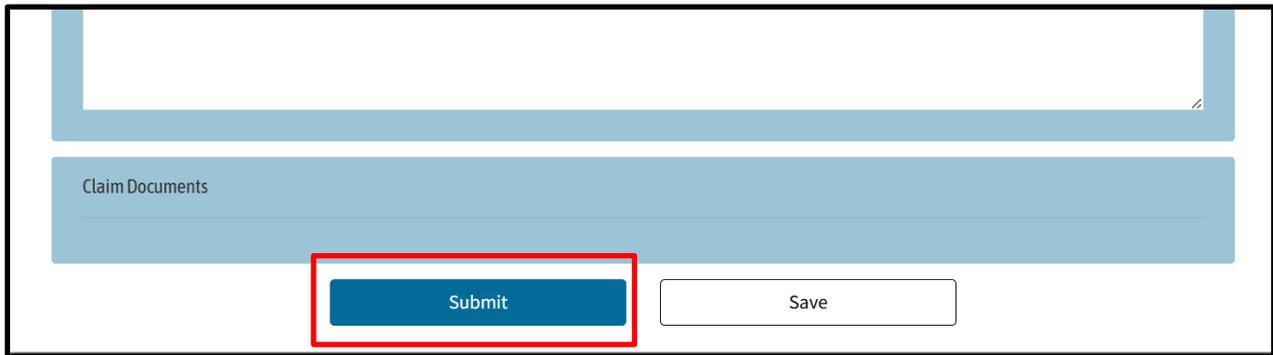
# BUILD

Building Initiative for Low-Emissions Development Program

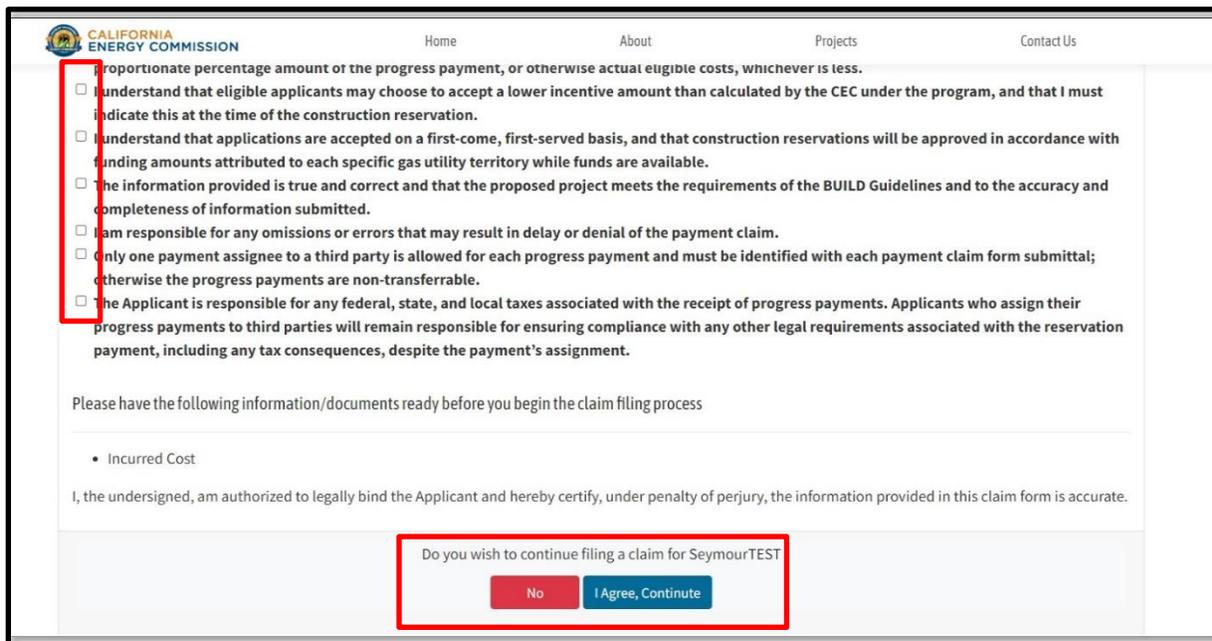
When assigning payment to another party, the information in the payment assignment section must match the information on the assigned party's Payee Data Record (STD 204).

**NOTE:** The Payee Data Record (STD 204) **must** be uploaded prior to clicking Submit Claim. A Payee Data 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.



# BUILD

Building Initiative for Low-Emissions Development Program

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	<a href="#">View Claim</a>

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	<a href="#">Create Claim</a>

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	<a href="#">View Claim</a>
C240293	24INS119A	Partial25Pct	\$15,997.50	9/24/2024 1:46:15 PM	Claim Awarded	<a href="#">View Claim</a>

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



# BUILD

Building Initiative for Low-Emissions Development Program

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.



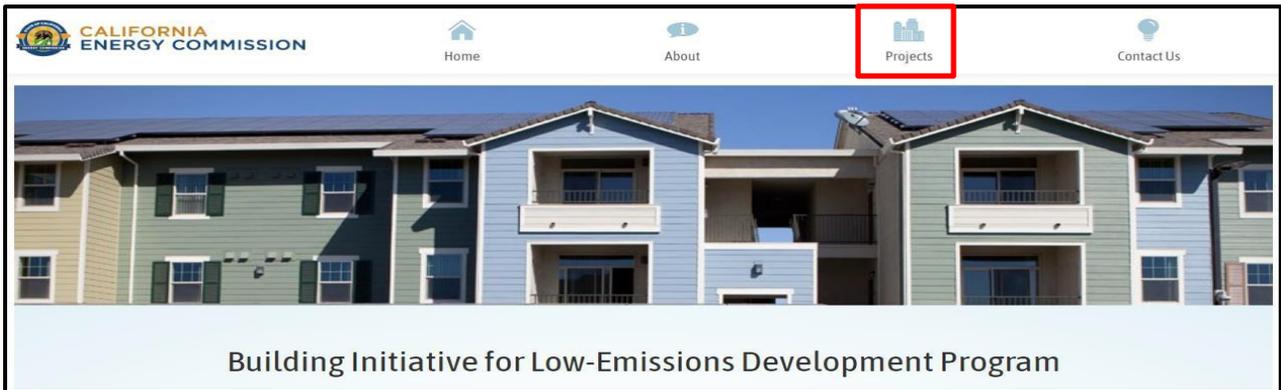
# BUILD

Building Initiative for Low-Emissions Development Program

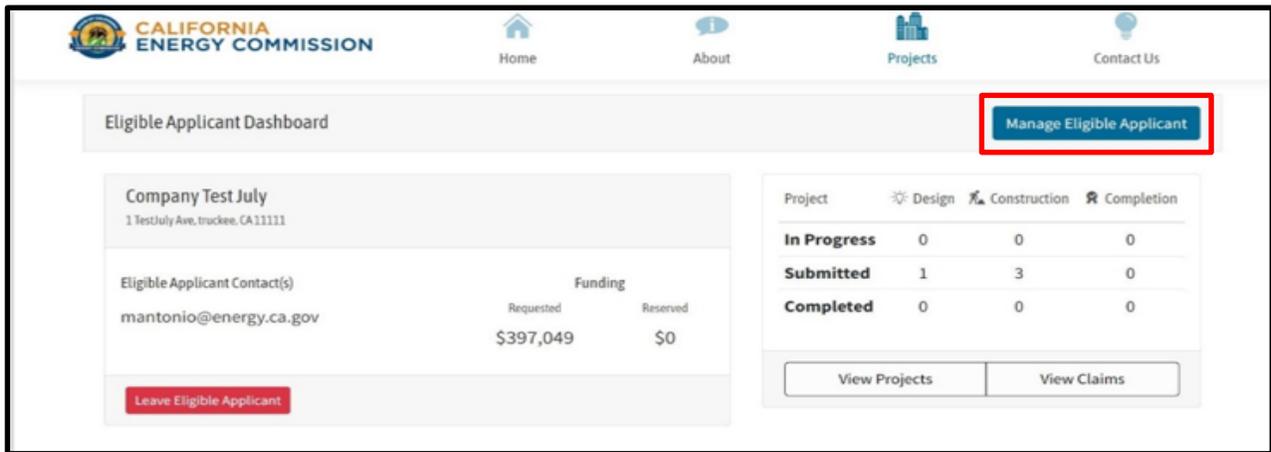
## 3.6. Step 3 Project Completion

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.



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

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.

Eligible Applicant Dashboard

Company Test July  
1 TestJuly Ave, truckee, CA11111

Eligible Applicant Contact(s)  
mantonio@energy.ca.gov

Funding	Requested		Reserved	
	Requested	Reserved	Requested	Reserved
	\$397,049	\$0		

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

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.

CLAIMS DASHBOARD

Claim Dashboard for Company Test July

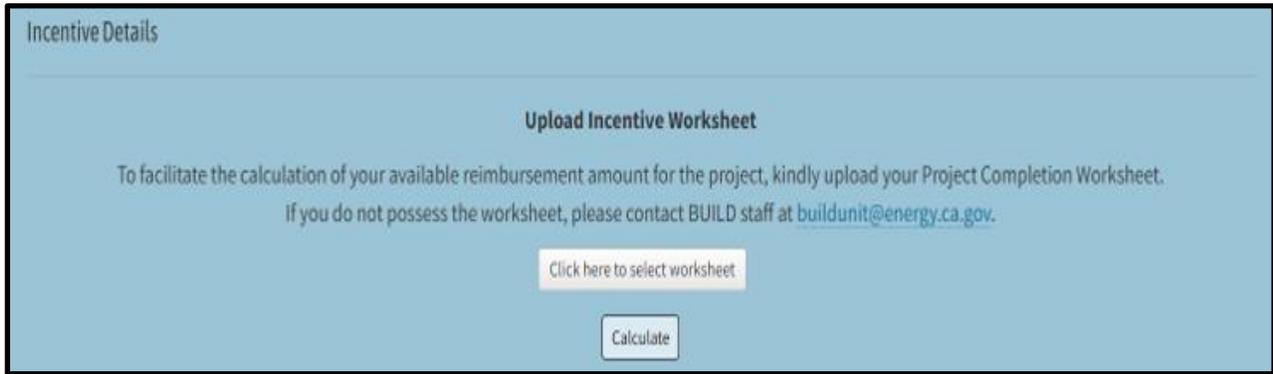
Qualifying Projects

Case ID	Project Stage	Project Name	Est. Project Amt	Submitted Date
C240286	Construction	CompanyTestJuly2	\$43,299.00	7/16/2024 11:31:00 AM



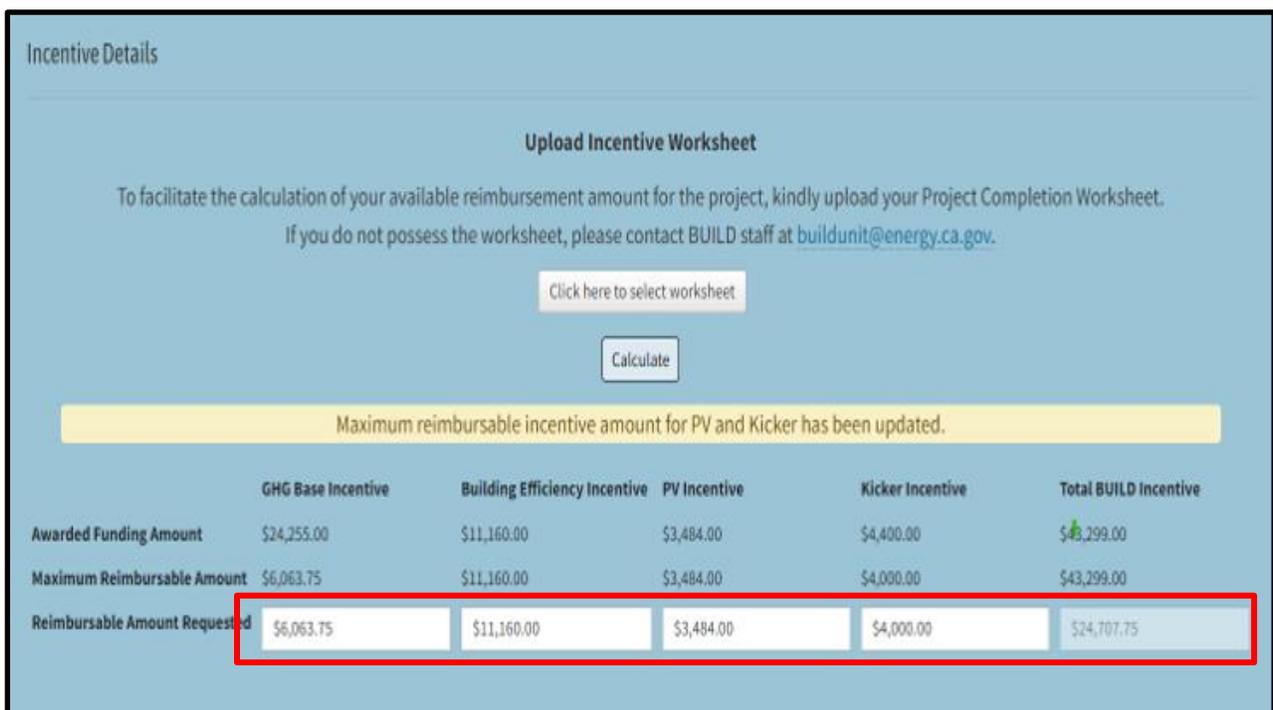
### 3.6.1. Required Documents

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.





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.

Required Document(s)

Please upload the following documents

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

Select

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.

Project Design or Timetable Changes (If Applicable)

What % of the project has been completed:

Claim Documents



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

BUILD Program Attestations

I, the applicant, attest to the following:

- The project is complete and has the appropriate certificate of occupancy required by the BUILD Program.
- The Step 3 Project Completion payment will reimburse eligible costs. Specifically, that the applicant has incurred costs in an amount greater than or equal to the final payment or otherwise actual eligible costs, whichever is less.
- The applicant understands that applications are accepted on a first-come, first-served basis, and that incentive reservations will be approved in accordance with funding amounts attributed to each specific gas utility territory while funds are available.
- The information being 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.
- The applicant is responsible for any omissions or errors that may result in delay or denial of the payment claim.
- 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.
- The CEC or its authorized agents may audit any applicant to verify the accuracy of any reservation or claim information. An audit may be performed at any time within three (3) years after applicant's final incentive payment.

I, the undersigned, am authorized to legally bind the Applicant and hereby certify, under penalty of perjury, the information provided during this claims process is accurate.

Do you wish to continue filing a Claim for Step3Project?

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

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	<input type="button" value="View Claim"/>



# BUILD

Building Initiative for Low-Emissions Development Program

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	<a href="#">Create Claim</a>

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 <a href="#">View Claim</a>
C240293	24INS119A	Partial25Pct	\$15,997.50	9/24/2024 1:46:15 PM	Claim Awarded <a href="#">View Claim</a>

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.