

Smart Homes Application for Small Developments

Commitment for up to \$150,000 of incentives

Payee Information

Applicant/Payee Name	Payee Phone
Federal Tax ID#	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Individual <input type="checkbox"/> Exempt
Payee Address	Payee City State/Zip

Project Information

Project Name	Project Contact Name								
Project Address/Location	Project Contact Email								
Project City/Zip	Permitting Agency								
Start Date	Permit Date (or estimated permit date)								
Estimated Completion Date	HERS Provider (Registry) <input type="checkbox"/> CalCERTS <input type="checkbox"/> CHEERS								
HERS Company/Rater	HERS Rater Email								
Single Family (SF) Housing Type: <input type="checkbox"/> Custom Home <input type="checkbox"/> Production Home <input type="checkbox"/> Duplex <input type="checkbox"/> Townhouse									
Multifamily (MF) Housing Type: <input type="checkbox"/> Apartment <input type="checkbox"/> Condominium <input type="checkbox"/> Single Resident Occupancy									
Total Number of Plan Types	Total Number of Lots/Units								
Please fill in the number of lots/units expected to complete construction by year/quarter (use a separate sheet if preferred):									
Year	Q1	Q2	Q3	Q4	Year	Q1	Q2	Q3	Q4
20_____					20_____				
20_____					20_____				

Incentive Information

Is this an all-electric project? <input type="checkbox"/> Yes with induction cooktops <input type="checkbox"/> Yes without induction cooktops <input type="checkbox"/> No <input type="checkbox"/> Undecided
Is this project running any gas lines or to the residences, mechanical rooms, common areas, retail/commercial spaces or any other structures on the property? <input type="checkbox"/> Yes, this project is mixed fuel <input type="checkbox"/> Yes, but the residences are all-electric <input type="checkbox"/> No gas on site
Mixed fuel projects only , please indicate which all-electric technologies are being implemented: Required: <input type="checkbox"/> Smart Home Ready AND Heat Pump Technology: <input type="checkbox"/> HVAC AND/OR <input type="checkbox"/> Water Heater Optional: <input type="checkbox"/> Induction Cooktop <input type="checkbox"/> Electric Laundry Dryer <input type="checkbox"/> Electric Fireplace/BBQ
Please fill in your estimates for the Solar Shares Program, if known, and indicate interest in battery incentives <i>Smart Home projects automatically begin the SMUD Solar Shares program enrollment, check this box to opt out of the program</i> <input type="checkbox"/>
Total Community Solar Shares kW _____ Total On-Site Battery Storage kW _____ No. of Battery Storage Units _____
Annual Incentive Allotment - To be completed by Program representative 20____: \$ _____ 20____: \$ _____ 20____: \$ _____ 20____: \$ _____ Total Application: \$ _____

Applicant Acknowledgement

I, the undersigned, acknowledge that:

- I have reviewed the Smart Homes terms and conditions on the following page and received a copy of the Program Manual for my review.
- Funds are limited and will be reserved on a first-come, first served basis after SMUD issues an acceptance package.
- SMUD commits incentives on a calendar year. SMUD, in its sole discretion, will decide whether to roll over funds to the next calendar year. Additional funds over the calendar year annual allotment are not guaranteed, but Builder may request additional incentive funds in writing for SMUD consideration.
- I give permission for SMUD to discuss all aspects of this project with my energy consultant and/or HERS rater.
- I understand that SMUD may require access, within reasonable notice, to the building site for program verification purposes at any time during my participation in the program. I hereby grant SMUD access to the building site upon reasonable notice.
- I confirm that the information I have supplied is true, correct, and complete given my current understanding of the project scope, which may be in development

Company Name _____

Applicant Name (Print) _____ Title _____

Electronic Signature _____ Date Signed _____

 I understand checking this box constitutes a legal signature confirming my acknowledgement and agreement to the terms above and those on the next page.Please submit your completed application and supporting documents to RNC@TRCcompanies.com

Smart Homes Program Requirements

Incentives are only available to the participating builder for homes that are built in SMUD service territory.

Participating projects must meet minimum program requirements for all homes within the same project, built after the date this Application is submitted. A home is considered built or complete when a CF-3R compliance form is uploaded to a registry approved by the California Energy Commission.

All-electric single family homes or multifamily homes must:

- Meet building code
- Have no natural gas connection on-site
- Dedicate space for one 50kVA transformer for every 10 homes

Mixed fuel homes must be single family and must include:

- Electric vehicle pre-wiring and plug
- Whole home pre-wire for all-electric
- Dedicated space for one 50kVA transformer for every 10 homes
- Heat pump water or space heating

Incentives may be nullified if a state or local government agency adopts a building code preventing the use of natural gas in new developments and the development in question is subject to the updated code.

How to Participate

The Smart Homes Application and Incentive Process can be completed in three steps:

1. Submit Application for Small Developments and Project Submittal Checklist (This form)
2. Receive Acceptance Package: Letter and addition enrollment document from SMUD confirming application and project submittal is complete and satisfactory. Incentives are officially reserved upon issuance of the letter.
3. Submit Incentive Request Forms: Form that informs SMUD of a completed project and initiates an incentive payment.

Please see the Program Manual for more details.

Title 24 Neighborhood SolarShares Program

Smart Home Program participants will automatically begin the enrollment process for the SMUD Neighborhood SolarShares program unless they select to opt out.

The SolarShares program provides an alternative way to access solar photovoltaic power for new residential homes to meet Title 24 2019 Energy Code pending California Energy Commission (CEC) approval in late 2019. Customers that live in SolarShares neighborhoods will receive a portion of their power from a utility-scale solar farm located in California at little or no cost to the builder.

Battery Storage Bonus

For a limited time only, program participants are eligible for a battery storage incentive. Battery installations must enable participation in SMUD's Commitment to Operate (CTO) program, in which SMUD reserves the right to operate 51% of the battery capacity during peak hours (5-8pm).

Please see SMUD.org/going-green for more information on battery storage.

Contact Us

Email us at rnc@trccompanies.com or call 866-352-7457 with questions or to discuss your application.

For more information visit: SMUD.org/going-green



Attachment 1

Project Submittal Checklist

Project Name: _____

Please submit the following documentation to SMUD's review team at rnc@trccompanies.com. The review team will perform a technical evaluation and notify you if changes or additional documentation is needed. The review team will then submit the Project Submittal Package to SMUD for final approval. Please expect an acceptance package for project submittals that meet program requirements. The acceptance package will include a copy of the Incentive Request Form, which you will use to request payment from SMUD once the project is complete.

- 1) A Complete Set of Construction Plans that contain the following:
 - Architectural, Electrical, Mechanical, and Plumbing (as applicable or available)
 - A window and door schedule showing sizes and including **All** skylights (if not shown on the floor plan)
 - Elevation, wall, roof, floor construction assemblies
 - Floor finish schedule (if CF-1R shows High Mass Design)
 - Plans must be submitted electronically as a PDF? file
 - **Plan Size Must Be Full or Half Size**

- 2) A List of Lots and Addresses

- 3) A site plan with a North arrow

- 4) Title 24 Forms and File, including:
 - PDF copy of the Certificate of Compliance Form (CF-1R) signed by a Certified Energy Analyst (CEA)
 - Electronic input files that generated the signed Certificate of Compliance Form (preferably via e-mail). This file will have file extension ".bld" for EnergyPro or ".RIBD" for CBECC-Res, ".CIBD" for CBECC-Com. Please note - only plans on the application should be submitted and uploaded

- 5) HERS Registry Sharing by your HERS Rater:
 - For CalCERTS:
 - Please share the project with "TRC Energy Services" in the registry
 - If we do not appear in your list of Energy Consultants, you may need to add us
 - If you or your rater need registry sharing instructions, please contact TRC immediately at rnc@trcsolutions.com and we will provide detailed instructions.
 - For CHEERS:
 - Please add "TRC Solutions" to the project member team
 - If the project is a custom home, let us know who is listed as the "builder"

- 6) Submit a W-9 Form:
 - Please submit a W-9 Form for the Tax ID or Social Security Number listed on your application
 - This should be completed by the payee

If applicable to your application:

- Specification sheets for any special features as included in your Title 24 calculations report

