

All-Electric Smart Homes Incentive Reservation Form

Applicant/Payee Name	Payee Phone	
Federal Tax ID #	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Individual <input type="checkbox"/> Exempt If exempt, describe why:	
Payee Address	Payee City	Payee Zip

PROJECT INFORMATION

Project Name	Is this an all-electric project? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Project Address/Location	Project City	Project Zip
Project Contact	Contact Email	
Permitting Agency	Permit Date (or estimated permit date)	
Start Date	Estimated Completion Date	
HERS Provider (i.e. HERS Registry)	HERS Company	
HERS Rater	HERS Email	

PROJECT TYPE

Please select housing type: Single Family (SF): <input type="checkbox"/> Custom Home <input type="checkbox"/> Production Home <input type="checkbox"/> Duplex <input type="checkbox"/> Townhome Multifamily (MF): <input type="checkbox"/> Apartment <input type="checkbox"/> Condominium <input type="checkbox"/> Single Resident Occupancy (SRO)	
Total Number of Lots/Units	Total Number of Plan Types
Expected # of Lots/Units to Complete in: 2018 _____ 2019 _____ 2020 _____ 2021 _____	
Is this project running any gas lines in, or to, the residences, common areas, or any other structure(s) on the property <input type="checkbox"/> Yes <input type="checkbox"/> No	Is this project implementing induction cooking? <input type="checkbox"/> Yes <input type="checkbox"/> No

GENERAL INSTRUCTIONS AND REQUIREMENTS

1. Call your local SMUD representative for details and funding availability on the Smart Homes program prior to submitting this agreement. Funds are limited and will be reserved on a first-come, first-served basis to projects that meet the program requirements.
2. Review the Smart Homes Program Participant Guidelines and Terms & Conditions (T&Cs).
3. Complete one form per project and list ALL plans/building types. Incentive payments are available only to owners, builders or developers named on the SMUD Incentive Agreement, unless there's been an approved submission of a Payment Release Form. Please ask a SMUD representative for details.
4. No projects will be accepted after drywall has been installed in enrolled units.

APPLICANT AGREEMENT

I, the undersigned, agree that:

1. I have read and understand and agree to abide to the program rules, requirements and terms and conditions set forth in this Agreement.
2. The information that I have supplied on this Agreement is true, correct and complete.
3. This project is not receiving duplicate funding from multiple utility sponsored energy efficiency programs for the same measures and associated fuels.
4. I give permission to SMUD to discuss all aspects of this project with my Energy Consultant and/or HERS Rater.
5. I understand that this agreement is valid for 36 months from date of SMUD acceptance.
6. I understand that this program is for all-electric projects only.

Company Name _____

Applicant Name (Print) _____ Title _____

Electronic Signature _____ Date Signed _____

I understand checking this box constitutes a legal signature confirming my acknowledgment and agreement to the above terms.

All Electric Smart Homes program requirements

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

Participating projects must meet minimum program requirements for all homes within the same project, built after the date the Agreement is submitted.
2. Project above must be submitted prior to any HERS testing beginning or drywall being installed on the units applying for incentives. Please check with your HERS rater prior to submitting your application packet to ensure the lots indicated on your application and lot list are eligible. All participating units must be new construction dwellings and modeled accordingly.
3. For verification purposes, all projects must contract with a certified HERS rater, even if HERS measures are not required. The HERS rater will be required to enter project verifications into the HERS registry for the compliance certificate. This includes verifications of non-HERS measures as applied in the projects' specified registry.
4. Funds are limited and will be reserved on a first-come, first-served basis to projects that meet the program requirements. No payments will be made for any changes made to the unit that may affect compliance without prior written approval from your utility representative.

Program process overview

Submit the following to your SMUD representative for each plan type within the project:

1. A completed, All-Electric Smart Homes Incentive Reservation Form at the start of the project.
2. Title 24 Certificate of Compliance authored and signed by a CEA.
 - Single-family and low-rise multi-family projects may require a copy of the final Title 24 CF-1R for each plan type.

- The electronic input file for the Title 24 energy compliance computer run for each model as constructed. This may be submitted by email to the SMUD representative. Accepted electronic files are .RIBD for CBECC-Res, .CIBD for CBECC-Com and .bld for EnergyPro.
3. A complete set of construction plans including:
 - A set of architectural plans including floor plans, elevations and sections.
 - A subdivision lot map for multi-family and single-family production projects.
 - A site plan with North arrow for custom homes.
 - A copy of the tract map (tentative or recorded), construction schedule with phases, lots and addresses when available.
 4. Applicant contracts with a Certified Energy Plans Analyst (CEA) to prepare the Title 24 documentation and secures a Home Energy Rating System (HERS) rater.
 5. SMUD may provide design assistance within reason for viable projects. SMUD will not provide funding for Title 24 documentation authors to reconstruct models or plans in the event of needed corrections.
 6. Upon completion of utility plan check, SMUD will provide you with a letter of acceptance and IncentiveRequestForm (IRF).

In cases where measures and construction elements may vary from default or minimum efficiency values, the program may require supporting specification sheets.

Sign the Agreement and submit the package to your SMUD representative. Projects must be submitted as a complete package. Incomplete application packages will be returned to the applicant.

Once you receive written approval from SMUD:

Construction and Inspection Phase

1. Ensure all applicable CF-2R forms are uploaded to the chosen HERS Registry for each home.
2. If applicable, obtain the appropriate CF-3R HERS rating certificates for each home upon completion of field verification; certificates must be submitted for the testing house according to CEC HERS sampling protocols.
3. Minimum participation requirements include the following:
 - a. All-electric appliances and mechanical systems
 - b. No gas lines in the home
 - c. No gas service at the property
4. Before any inspections are uploaded to the HERS registry, notify SMUD of any changes that will affect total energy use of the home, such as added or relocated windows, addition of “bonus” rooms or other areas not shown on the Title 24 submittal, changes in proposed HVAC or water heating equipment, and/or changes to building insulation. Changes made without notification may forfeit incentive payment.
5. If applicable, submit all additional documentation as requested by SMUD or as shown on the Incentive Request Form (IRF) (e.g. lot site map with north arrow, etc.).

Verification by SMUD

Prior to paying incentives, SMUD will review all inspection documents to ensure program compliance. SMUD retains final authority to determine program compliance and eligibility for incentives. Mail or email all correspondence to your SMUD representative.