

Smart Homes Application

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"/> Manufactured Home <input type="checkbox"/> Duplex <input type="checkbox"/> Townhouse <input type="checkbox"/> ADU 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 ____				

☐ Small development
(under \$150,000 in estimated incentives)

☐ Large development
(over \$150,000 in estimated incentives)

For Single Family only: Does the project include all of the following prerequisites?

- | | | |
|--|--|---|
| <input type="checkbox"/> All-electric construction | <input type="checkbox"/> Battery storage readiness | <input type="checkbox"/> Induction cooktops |
| <input type="checkbox"/> Communicating smart thermostats | <input type="checkbox"/> Segregated circuits | <input type="checkbox"/> EV plug |
| <input type="checkbox"/> Heat pump space heating | <input type="checkbox"/> Heat pump water heaters | |

For Multifamily only: Does the project include all of the following prerequisites?

- | | | |
|--|--|--|
| <input type="checkbox"/> All-electric construction | <input type="checkbox"/> Segregated circuits | <input type="checkbox"/> Induction cooktops |
| <input type="checkbox"/> Communicating thermostats | <input type="checkbox"/> Heat pump water heaters | <input type="checkbox"/> Heat pump space heating |
| <input type="checkbox"/> High rise | <input type="checkbox"/> Low rise | |

Is this project installing the following?

☐ Central heat pump water heater

For Manufactured homes only: Does the project include all of the following prerequisites?

- | | | |
|--|--|---|
| <input type="checkbox"/> All-electric construction | <input type="checkbox"/> Battery storage readiness | <input type="checkbox"/> ENERGY STAR® certified |
| <input type="checkbox"/> Communicating smart thermostats | <input type="checkbox"/> Heat pump water heaters | <input type="checkbox"/> Induction cooktops |

For all projects:

Is this project affordable housing? ☐ Yes ☐ No

Code year: _____



Smart Homes Application

Applicant Acknowledgement

I, the undersigned, acknowledge that:

1. I have reviewed the Smart Homes terms and conditions on the following page and received a copy of the Program Manual for my review.
2. Funds are limited and will be reserved on a first-come, first served basis after SMUD issues an acceptance package.
3. 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.
4. I give permission for SMUD to discuss all aspects of this project with my energy consultant and/or HERS rater.
5. 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.
6. 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.
7. Code changes: Incentives will be nullified if homes become subject to a local or state building code that requires all-electric new home construction as of the effective date of the code.

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
- Builder shall provide adequate space for all the electric infrastructure and equipment necessary to serve the development

Homes must include:

- Electric vehicle (EV) infrastructure pre-wiring and plug for single family homes
- Segregated circuits for energy monitoring readiness for single family and multifamily homes
- Heat pump water and space heating
- Builders agree to include communicating smart thermostats designed to meet ENERGY STAR® certification

How to Participate

The Smart Homes application and incentive process can be completed in three steps:

1. Submit application
2. Project completes technical review to verify the project meets program requirements.
2. Receive acceptance package: Letter and additional 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 form: Form that informs SMUD of a completed project and initiates an incentive payment.

Please see the Program Manual for more details.

Battery Storage Incentives

Qualified residential battery storage customers can receive incentives by participating in our residential battery storage incentive program, My Energy Optimizer. There are several levels of program participation to choose from. Learn more at smud.org/StorageResidential.

Contact Us

Email us at rnc@trccompanies.com or call **833-987-3935** 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
 - 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
 - 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 CHEERS:
 - Please add "TRC Energy 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
 - Out-of-state payees must submit a CA587 or CA590 form

If applicable to your application:

- Specification sheets for any special features as included in your Title 24 calculations report
- Include verification that the development is certified as affordable or otherwise eligible housing based on regulatory designation. Refer to the program manual for details.
- Manufactured housing projects must submit proof of ENERGY STAR® certification, photo of ENERGY STAR® label affixed either adjacent to the HUD data plate or inside the electric panel cover of the home and manufactured home invoice with specification breakdown.

