

Smart Homes Application for Large Developments

Notification of intent to sign an Agreement for \$150,000 or more 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____				

For Single Family only:

Does the project include all of the following prerequisites?
 All-electric construction
 240V EV plug
 Communicating SMART thermostat
 Segregated circuits
 Battery storage readiness

Is this project installing the following?
 Induction cooktops
 Level II chargers

For Multifamily only:

Does the project include all of the following prerequisites?
 All-electric construction
 Segregated circuits
 Communicating thermostats

Is this project installing the following?
 Communicating SMART thermostat
 Induction cooktops
 Central heat pump water heater
 Distributed heat pumps

For all projects:

Is this project affordable housing?
 Yes
 No

Is this project participating in Neighborhood SolarShares?
 Yes
 No



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Applicant Acknowledgement

I, the undersigned, acknowledge that:

1. I have a strong interest in participating in the SMUD Smart Home Program and will execute an Agreement as soon as possible. The intent of this non-binding application is to allow SMUD to prepare the Agreement for Builder signature.
2. Incentives are not reserved or held until an Agreement is executed between Builder and SMUD.
3. I have received a copy of the Program Manual for my review.
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.
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 multi-family 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 for single family homes.
- Builders agree to install communicating thermostats for multifamily projects.

How to Participate

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

1. Submit an application and project submittal checklist (this form)
2. Receive an email confirmation of a successful project submittal with an agreement for your signature
3. Return signed agreement to SMUD
4. Receive an acceptance package with the fully executed agreement and details on how to receive the incentive payment. The SMUD incentive is officially reserved after this step.
5. Submit incentive request form(s) to request payment from SMUD after each phase of the project is complete.

Please see the Program Manual for more details, including a checklist for project submittals.

Title 24 Neighborhood SolarShares Program

Program participants are eligible to enroll in SMUD's Neighborhood SolarShares program.

All new residential construction, both single family and multifamily, are eligible to participate in Neighborhood SolarShares if SMUD is the electricity provider. Neighborhood SolarShares is an approved option to meet the solar generation required by the Title 24 2019 Energy Code. Neighborhood SolarShares serves accessory dwelling units, individual custom residential projects as well as production housing. Interested participants must submit a separate Neighborhood SolarShares application. Please contact Solar.Shares@smud.org or visit smud.org/en/Business-Solutions-and-Rebates/Neighborhood-SolarShares-for-developers for more information.

Battery Storage Incentives

Qualified residential battery storage customers can receive up to \$2,500 in incentives by participating in our battery storage incentive program, My Energy Optimizer. There are 3 levels of program participation to choose from. Learn more at smud.org/StorageResidential.

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
 - 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.

