New Solar Homes Partnership

Web Tool Application Training

June 2015
Hardware and Software Requirements

The following minimum configuration is required: Standard PC or Mac with Microsoft Internet Explorer v 7.0 is recommended.

Installation

The web tool is a MS.NET database application running on SQL 2008. The application is accessed through Microsoft Internet Explorer 7.0 or higher web browser. Therefore, no application installation is required. In order to read documents stored within the web tool, **ADOBE PDF READER IS RECOMMENDED.**

Customer Support

Customer support for the New Solar Homes Partnership program (NSHP) application process moves through two different levels. The customer can access Level One support through the NSHP web tool “Help/FAQ” link, which provides answers to commonly asked questions. Customers with additional questions should contact the Energy Commission’s Renewables Call Center. The Renewables Call Center should be able to address general inquiries on the NSHP program and the web tool.

<table>
<thead>
<tr>
<th>Level One</th>
<th>Level Two</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Self Help: Frequently Asked Questions</td>
</tr>
<tr>
<td></td>
<td>Contact the Energy Commission’s Renewables Call Center</td>
</tr>
</tbody>
</table>

Program Administrator

**California Energy Commission**
New Solar Homes Partnership
1516 Ninth Street, MS-45
Sacramento, CA 95814
Phone: 1-844-217-4925
E-mail Address: renewable@energy.ca.gov

Summary of New Solar Homes Partnership Guidebook Requirements

The following table is a brief summary of program eligibility requirements. The applicant should refer to the most recent version of the *New Solar Homes Partnership Guidebook* located at: [http://www.gosolarcalifornia.ca.gov/about/nshp.php](http://www.gosolarcalifornia.ca.gov/about/nshp.php) for more detailed descriptions of the requirements.
### Table 1-1: Summary of Program Eligibility Requirements *(NSHP Guidebook, Ninth Edition)*

<table>
<thead>
<tr>
<th>Program Element</th>
<th>NSHP Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligible Technologies</td>
<td>Flat-plate photovoltaics only</td>
</tr>
<tr>
<td>Eligible Electric Service Territories</td>
<td>PG&amp;E, SCE, SDG&amp;E, and BVES</td>
</tr>
<tr>
<td>Eligible Housing Types</td>
<td>New residential construction, including total building renovations, common areas of housing developments, and qualifying mixed-use projects.</td>
</tr>
<tr>
<td>Eligible Equipment</td>
<td>New and not previously placed in service, and on the Energy Commission’s eligible equipment website.</td>
</tr>
<tr>
<td>Reservation Period</td>
<td>36 months for qualifying large developments, all affordable housing projects (includes projects with a non-tax-exempt system owner), and virtual net-metered projects. 18 months for all other projects.</td>
</tr>
</tbody>
</table>
| Incentive Level                                      | Expected Performance-Based Incentive (EPBI) for Incentive Level 7 for market-rate housing projects, affordable housing common areas, or affordable housing projects with a non-tax-exempt system owner, and Incentive Level 6 for affordable housing residential units with tax-exempt system owners, based on the reference system receiving:  
 $1.50/watt for affordable housing residential units with tax-exempt system owners meeting Code-Compliant energy efficiency requirements,  
 $1.85/watt for affordable housing residential units with tax-exempt system owners meeting Tier I or Tier II energy efficiency requirements,  
 $0.75/watt for market-rate housing projects, affordable housing common areas, or affordable housing projects with a non-tax-exempt system owner meeting Code-Compliant energy efficiency requirements,  
 $1.00/watt for market-rate housing projects, affordable housing common areas, or affordable housing projects with a non-tax-exempt system owner meeting Tier I energy efficiency requirements, or  
 $1.50/watt for market-rate housing projects, affordable housing common areas, or affordable housing projects with non-tax-exempt system owners meeting Tier II energy efficiency requirements.  
 Additional funding may be available from the utilities for meeting Tier I and Tier II energy efficiency requirements. |
| Incentive Level Adjustment                            | Volumetric trigger. Declines as prespecified target MW volumes are reached.       |
| Incentive Adjustments                                | Depends on geographic location, orientation, tilt, shading, and equipment efficiency. |
| Energy Efficiency Requirements                       | Code-Compliant: The building complies with the 2013 Standards.  
 Tier I: Residential buildings that exceed the Building Energy Efficiency Standards in effect on the date the building permit is applied for by at least 15%.  
 Tier II: Residential buildings that exceed the Building Energy Efficiency Standards in effect on the date the building permit is applied for by at least 30%.  
 An ENERGY STAR® label is required for appliances provided by the builder for all projects. |
| Interconnection                                      | Grid connected with eligible utility required.                                    |
| Solar Energy System Installation Field Verification Checkpoints | Solar energy system installation, equipment, and performance shall be verified by the installing contractor and a certified HERS Rater. |
| Program Element                                      | NSHP Requirement for Tier I or Tier II                                           |
| Energy Efficiency Measures Installation Field Verification | Energy efficiency measures used to meet the Tier I or Tier II performance level shall be field verified by the installing contractor and a certified HERS Rater. |

Source: California Energy Commission
Table 1-2: Project Types and Required Reservation Application Documentation

<table>
<thead>
<tr>
<th>Reservation Application Documents</th>
<th>Affordable Housing Residential Dwelling Unit</th>
<th>Affordable Housing Common Area</th>
<th>Custom Home</th>
<th>Large Developments</th>
<th>Small Developments</th>
<th>Projects w/ Solar on Fewer Than 50% of Residential Units</th>
<th>Market-Rate Common Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reservation Application Form:</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>NSHP-1</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Subdivision Map*, ***</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Building Permit***</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
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<tr>
<td>EPBI Documentation</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>NSHP PV-1 Compliance Form</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Electronic Input Files (.emf, .her)</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
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<tr>
<td>Energy Efficiency Documentation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CF-1R Form</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Electronic Input Files (.bld/.mp7, .mp8, .ribd)**</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Plan Set and Checklist Items**</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Utility New Construction Energy Efficiency Program Approval Letter**</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lease Agreement/Power Purchase Agreement (PPA)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Installation Contract****</td>
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<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Regulatory Agreement</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Applicants may provide either a tentative or final subdivision map or building permit as proof of residential new construction.

**For projects complying with the 2013 Standards and applying for the Code-Compliant incentive, the electronic input file, plan set, and checklist items are not required to be submitted.

***If the project is participating in the utility new construction energy efficiency program, then the applicant may submit the program approval letter in place of the building permit/subdivision map and energy efficiency documentation.

****For systems that are self-installed, an equipment purchase agreement must be submitted in place of an installation contract.
General Instructions – Getting Started

Before beginning the online application process, please read the most recent version of the New Solar Homes Partnership Guidebook located at: http://www.gosolarcalifornia.ca.gov/about/nshp.php. You should also check to make sure that you have all of the necessary documents for a complete reservation application.

The NSHP web tool Home Page can be accessed by going to the web address: https://www.newsolarhomes.org. From the Home Page, further access to the application is based upon a user’s log-in. There are two types of users: Homeowners (or builder/developer) and Representatives.

Menu Navigation

**NSHP Process:** Quick overview of the application process

**Help & FAQ:** A list of Frequently Asked Questions and help information about the NSHP web tool.

**Rebate Levels:** List of current Incentive levels for all program activity.

**Reports:** Select program and project search criteria to download NSHP reporting data.

**Sign Up:** Select the NSHP customer type to apply to the NSHP program.

**Login:** Use previously created Login and Password to log onto the NSHP web tool.
Forgot Login: Open this link if you have forgotten your username.

Forgot Password: Open this link if you have forgotten your password.

Creating an Account – Signing Up

In order to use the NSHP web tool, an applicant must first set up an account through the “Sign Up” process.

This account will be used to:

- Login
- Manage projects/sites
- Check application status

The applicant must have a valid email address in order to sign up.

Select the Sign Up link on the home page.

Select the type of customer that best describes you:

I am a Homeowner: A homeowner or developer who is planning to install solar equipment on one or more residential units.

I am a Representative: An agent that is representing a homeowner, builder or developer.

Homeowner Sign Up
Select the “I am a Homeowner” Icon.

**NSHP Web Application User Information**

*Note: Asterisks (*) noted are required fields. You will not be able to proceed until these fields have been completed.*

Add Login information (Between 5 and 20 characters).

Add Password information (At least 8 characters) and confirm password.

Select the Continue button.

---

**Sign Up for the New Solar Home Program (NSHP)**

Login*: 

Password*: 

Confirm Password*: 

<< Cancel  Continue >>

---

**Personal Information**

Complete the Personal Information and select the Continue button.

---

**Sign Up for the New Solar Home Program (NSHP)**

First Name*: 

Last Name*: 

Title: 

Phone*: 

Email*: 

Fax: 

<< Cancel  Continue >>
Address

Enter the mailing address to complete the Address section and select the Continue button.

Next Steps

Your new NSHP account has been created. You can now select what you would like to do next.

- Create a New Project
- Go to the NSHP Main Menu
- Finish and come back to the NSHP web tool later

If you are ready to create a new project, select the option “Create a New Project now.”

You will now add project information.
Creating a Project

Project Description

Enter project name, address information, city, state and zip code. After you enter your zip code, the name of the Electric Service Provider that services your area will appear in the drop down box labeled “Electric Service Provider.”

If you check the “Utility Energy Efficiency Program?” box, you will be asked for the Residential New Construction Program Number. If you are participating in a program, please add the number to this box.

Project Contacts

You will now select or create your contacts for the project. These four contacts will be the only users with access to this project.

Builder/Homeowner: Select or create the Builder/Homeowner of the project.
**Primary Contact**: Select or create the person who should be contacted if the program administrator has questions regarding this application.

**Alternate Contact**: Select or create the person who should be contacted by the program administrator if the primary contact is not available.

**Authorized Representative**: Select or create the authorized representative for the project.

**Creating a Project Contact**

A homeowner, builder, representative, primary contact and alternate contact can also be referenced as an *Associate* with this web tool application.

Enter all applicable information and select the “Save & Return” button. Fields with asterisks are required. You cannot continue until these fields are complete.
### Project Detail

- **Applicant Is**: Select whether the Applicant is the Homeowner or Builder/Developer.

- **Occupancy Type**: Single Family Home or Multi-Family Home.

- **Residential Units**: Enter the total number of residential units within this project.

- **Residential Units with Solar**: Enter the number of residential units within this project that will have solar installed.

- **Common Area Units with Solar**: Enter the number of common area units with solar (if applicable). A common area is eligible for an incentive as long as the common area(s) primarily benefit the residential occupants. If there are no common areas, please enter “0” in the common area section.

- **Reservation Type**:
  - Larga Development (≥ 6 Units or More)
  - Custom Home
  - Small Housing Development (≤ 5 Units or Less)
  - Solar NOT as a Standard
  - Common Area Systems
  - Affordable Housing

- **Will your system be Virtual Net Metered (VNM)?**
  - Yes
  - No

- **Please provide the system generation allocation percentages:**
  - Residential Dwelling Units:
  - Affordable Housing Residential Dwelling Units:
  - Common Areas:

---

**Applicant Is**: Select whether the Applicant is the Homeowner or Builder/Developer.

**Occupancy Type**: Single Family Home or Multi-Family Home.

**Residential Units**: Enter the total number of residential units within this project.

**Residential Units with Solar**: Enter the number of residential units within this project that will have solar installed.

**Common Area Units with Solar**: Enter the number of common area units with solar (if applicable). A common area is eligible for an incentive as long as the common area(s) primarily benefit the residential occupants. If there are no common areas, please enter “0” in the common area section.
Reservation Type

Large Developments: Projects where the builder/developer has committed to installing solar on 50 percent or more of the dwelling units of a build-out phase of six or more residential units.

Custom Home: This is a home that is especially designed to meet the specifications of the person who commissioned it.

Small Developments: This is a small housing development with less than six homes built.

Common Area Systems: These are solar systems installed on common areas of new residential, mixed-use buildings or developments. The common area must provide a primary benefit for the residential occupants.

Projects w/ Solar on Fewer Than 50 Percent of Residential Units (Solar NOT as Standard): The builder/developer offers solar energy systems as an option to residential home buyers. The NSHP will reserve funding for up to 50 percent of the residential dwelling units in this project.

Affordable Housing: Eligible projects include multifamily and single family developments where at least 20 percent of the project units are reserved for extremely low, very low, lower or moderate income households for a period of at least 10 years. The affordable housing projects must be undertaken pursuant to Sections 50052.5, 50053, or 50199.4 of the Health and Safety Code, or other affordable housing laws or regulations adopted by the California Department of Housing and Community Development.

Project Detail Notes: Project Detail Notes listed at the bottom of the Project Information page can be viewed and edited by anyone with access to the project.

After all applicable information has been added, select the “Add Project” button underneath Project Detail Notes.
After you select the Add Project button, you are taken to the Project Summary page. Note the timeline above the Project box. This timeline will provide a snapshot of the current progress of your application.

The Project Summary provides status information pertaining to the project. The next step of the application process is to add documents (Attachments) for your project.

Select the “Complete Attachments” button.

### Project Summary

<table>
<thead>
<tr>
<th>Project Reservation</th>
<th>Site Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>Sites</td>
</tr>
<tr>
<td>Review</td>
<td>Review</td>
</tr>
<tr>
<td>Complete</td>
<td>Complete</td>
</tr>
</tbody>
</table>

**Project**

- **ID:**
- **Type:**
- **Applicant:**
- **Incentive Levels**
- **Submission Date:**

**Name:**

- **Status:**
- **Expiration:**

**Actions**

- Submit
- Cancel Submit
- Re-Apply
- Plan Check Ready
- Submit to Plan Check
- Approve Plan Check
- Approve
- Disapprove
- More Information
- Withdraw
- Complete Expiration

---

**Before submitting your Project for approval, please review the following statuses. Complete any items where status is Incomplete.**

**Project Information**

- Complete

**Attachments**

- Incomplete
- Complete Attachments
- 8 Project Document Attachment(s) Required

**Sites**

- Incomplete
- Complete Sites
- 1 Site(s) Required
Select the required Guidebook Requirement form/file by selecting the Attach hyperlink or the Mail In hyperlink. You can also select the Mail All hyperlink. If you download a form/file, please use the appropriate file type that is noted next to the form/file name. All required forms that do not specify a file type must be submitted as a .pdf. If the file cannot be read, then the document will be considered incomplete and will need to be resubmitted.

For faster processing time, it is highly recommended to submit your project in the web tool. All projects in the web tool have priority over mail-in projects. Note: Attachments have a size restriction. The document cannot be larger than 15 MB. You can break up the attachment into smaller sizes in order to submit via the web tool, or submit the entire attachment by mail.

### Project Attachments

<table>
<thead>
<tr>
<th>Project Reservation</th>
<th>Site Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Information</strong></td>
<td><strong>Review</strong></td>
</tr>
<tr>
<td><strong>Complete</strong></td>
<td><strong>Sites</strong></td>
</tr>
<tr>
<td><strong>Projects</strong></td>
<td><strong>Review</strong></td>
</tr>
<tr>
<td><strong>Payment</strong></td>
<td><strong>Payment</strong></td>
</tr>
</tbody>
</table>

#### Actions
- Submit
- Cancel Submit
- Re-Apply
- Plan Check Ready
- Submit to Plan Check
- Approve Plan Check
- Withdraw
- Complete Expiration

#### Expand All  Mail All  Download Reservation Application

<table>
<thead>
<tr>
<th>Guidebook Requirement</th>
<th>Attach</th>
<th>Mail In</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Building Permit / Subdivision Map*</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>2. Construction Plan-Set*</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>3. Equipment Purchase Agreement/Installation Contract*</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>4. Lease / PPA Agreement</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>5. PV Calculator CF-1R-PV / NSHP PV-1 Form*</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>6. PV Calculator File (.emf)</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>7. PV Calculator File (.her)*</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>8. Reservation Application Form (NSHP-1)*</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>9. System Size Justification</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>10. Title 24 CF-1R File (.bld, .mp7, .mp8, or .ribd)*</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>11. Title 24 CF-1R Form*</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
<tr>
<td>12. Utility Energy Efficiency Program Reservation Approval Letter</td>
<td>Attach</td>
<td>Mail In</td>
</tr>
</tbody>
</table>

Asterisks (*) next to any Document indicates that the Document is required.
After the Attachments have been selected, click on the Incomplete link in the Project box and you will be returned to the Project Summary screen.

You will now complete the sites associated with the Project.

Select the Complete Sites button.

### Project Summary

<table>
<thead>
<tr>
<th>Project Reservation</th>
<th>Site Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ID:</strong></td>
<td><strong>Site Payment</strong></td>
</tr>
<tr>
<td><strong>Type:</strong></td>
<td><strong>Site Payment</strong></td>
</tr>
<tr>
<td><strong>Applicant:</strong></td>
<td><strong>Site Payment</strong></td>
</tr>
<tr>
<td><strong>Incentive Levels:</strong></td>
<td><strong>Site Payment</strong></td>
</tr>
<tr>
<td><strong>Submission Date:</strong></td>
<td><strong>Site Payment</strong></td>
</tr>
</tbody>
</table>

**Actions**

- Submit
- Cancel Submit
- Re-Apply
- Plan Check Ready
- Submit to Plan Check
- Approve Plan Check
- Plan Check More Information
- Approve
- Disapprove
- More Information
- Withdraw
- Complete Expiration

**Before submitting your Project for approval, please review the following statuses. Complete any items where status is Incomplete.**

**Project Information**

- Complete

**Attachments**

- Complete

**Sites**

- Incomplete
- **Complete Sites**
  - 1 Site(s) Required.
Creating a Site

After the Complete Sites button is selected, you will be taken to the Site Search page. To create a new site, select the New Site link.

**Site Search**

<table>
<thead>
<tr>
<th>Project Reservation</th>
<th>Site Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>Sites</td>
</tr>
<tr>
<td>Review</td>
<td>Review</td>
</tr>
<tr>
<td>Complete</td>
<td>Payment</td>
</tr>
</tbody>
</table>

1. **Project**
   - ID:
   - Type:
   - Applicant:
   - Incentive Levels:
   - Submission Date:
   - Name:
   - Status: **Incomplete**
   - Expiration:

2. **Search Criteria**
   - Administrator: [All]
   - Site Name, Address or ID:
   - Status: [Select]
   - Deleted: Not Deleted
   - Filter

After selecting the link you will be taken to the Site Detail – Add screen.
Site Description

The address, city, state, and zip code will automatically carry over from the Project Address. If the address is not correct, make appropriate changes.

Note: if one or more common areas are listed under project information then each common area needs its own site created. If the solar PV system is being applied to a common area, check the “Common Area?” box.

The Builder/Homeowner name will be added automatically. Change if necessary. In the Rebate Payee contact box, select a name from the drop-down menu or add a new contact person.

Building Energy Efficiency Standards

Please select the edition of the Building Energy Efficiency Standards that the building was permitted under:

- [ ] 2005
- [ ] 2006
- [ ] 2013

Rebate Information

Time Dependent Valuation (TDV)**: 
Rebate Amount**: 
Title 24 Margin**: $ 
%
**Time Dependent Valuation (TDV):** This information is derived from the CECPV Calculator\(^1\).

**Rebate Amount:** This information is derived from the CECPV Calculator.

**Title 24 Margin:** Provided on Certificate of Compliance form (CF-1R).

The Permits, Equipment and HERS sections will be completed after the installation of the solar system, so they do not have asterisks at this time. The permit information does not need to be completed at the time of reservation application, but will need to be completed before the site receives payment.

**Building Permit Issue Date:** This is the date the building permit was issued from the local jurisdiction.

**Certificate of Occupancy Date:** This is the date the building permit is signed off or when a document is issued by a local government agency certifying a building’s compliance with applicable building codes and other laws, and indicating it to be in a condition suitable for occupancy.

**Solar Permit:**
- **Issue Date:** This is the date that a local jurisdiction issued a solar permit.
- **Cost:** This is the costs the local jurisdiction charged for the solar permit.

**Electric Grid Interconnection Date:** This is the date the utility approves the connection of the solar system to the grid. This information is noted on the Interconnection Letter received from the utility.

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\(^1\) The CECPV Calculator incorporates detailed inverter performance modeling and uses weather data from the 16 climate zones in California (as used by the Title 24 compliance calculations). The MS Excel interface to the calculation engine is provided by the Energy Commission for download and allows the user to select PV modules and inverters from a library of eligible equipment. Please check this website periodically for updates as new equipment may be added to the NSHP eligibility lists: http://www.gosolarcalifornia.ca.gov/equipment/index.php
System Acquired by: Select whether the equipment was purchased, leased, or applicant entered into a Power Purchase Agreement (PPA).

System Owned By: Select whether the entity that owns the system is tax-exempt or non-tax-exempt. This is a required field and must be checked before the site can be completed.

Equipment Cost: Enter the cost of equipment which includes the modules and inverters.

Installation Cost: Enter the cost of installation of the solar PV system.

Balance of System Cost: Enter the balance of system costs which include any additional costs associated with the installation. The web tool suggests some examples of additional costs as you hover your cursor over the field.

Total Cost: These costs will be calculated automatically.

Energy Efficiency Provider (EE): From the drop down menu select the HERS provider (CHEERS or CalCERTS).

Photovoltaic System Provider (PV): From the drop down menu select the HERS provider (CHEERS or CalCERTS).

Raters Cost (EE): Enter the cost the HERS rater charged for the energy efficiency field verification.
Raters Cost (PV): Enter the cost the HERS rater charged for the photovoltaic system field verification.

Total HERS Rater Cost: This will be automatically calculated.

Enter all applicable information and select the Save and Return button.

After you select the Save and Return button you will be taken back to the Site Summary screen.

Note: The status for Equipment is Incomplete. Select the Complete Equipment button.

Site Summary

<table>
<thead>
<tr>
<th>Project Reservation</th>
<th>Site Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>Sites</td>
</tr>
<tr>
<td>Review</td>
<td>Review</td>
</tr>
<tr>
<td>Complete</td>
<td>Payment</td>
</tr>
</tbody>
</table>

Project

ID: 
Type:
Applicant: 
Incentive Levels
Submission Date: 

Name: Status: Incomplete

Expiration:

Site

ID: 
Address/Name: Status: Incomplete

Actions: Submit Cancel Submit Withdraw Return Unused Capacity

Before submitting your Site for approval, please review the following statuses. Complete any items where status is Incomplete.

Site Information

Attachments

Equipment

Complete Equipment

Modules Required

Inverters Required
To enter an inverter or module, select the **New Inverter** hyperlink or the **New Module** hyperlink.

### Equipment Summary

<table>
<thead>
<tr>
<th>Project Reservation</th>
<th>Site Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="72x708" alt="Image" /></td>
<td><img src="469x676" alt="Image" /></td>
</tr>
</tbody>
</table>

- **Project**
  - ID:
  - Type:
  - Applicant:
  - Incentive Levels:
  - Submission Date:

- **Name:**
  - Status: ![Incomplete]
  - Expiration:

- **Site**
  - ID:
  - Address/Name:
  - Status: ![Incomplete]

- **Actions**
  - Submit
  - Cancel Submit
  - Withdraw
  - Return Unassigned Capacity

- **Search Criteria**
  - Deleted:
    - Not Deleted ▼
  - Filter

- **New Inverter** ![New Module] Records Found: 0
  - Page 0 of 0
  - Records Per Page: 10 ▼
If you know the manufacturer of the inverter, use the drop-down menu under Search Criteria and scroll down to the manufacturer’s name which will be highlighted. Select the Filter button and all of the inverters for this manufacturer will be displayed. Add the number of inverters in the box to the right of the selected inverter. Select the Next Step button.

**Equipment - Inverters**

<table>
<thead>
<tr>
<th>Project Reservation</th>
<th>Site Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>Review</td>
</tr>
</tbody>
</table>

- **Project**
  - **ID:** NPD00050L
  - **Type:** Custom Home
  - **Applicant:**
  - **Incentive Levels**
  - **Submission Date:** N/A
  - **Name:** S
  - **Status:** Incomplete

- **Site**
  - **ID:** NSB01JMC
  - **Address/Name:** cfas
  - **Status:** Incomplete

**Step 1 - Select items.**

- **Search Criteria**
  - **Manufacturer:**
  - **Model:**
  - **Filter**

**Inverters**

Records Found: 3598

Page 1 of 160

<< First  Prev  Records 1 - 10  Next >>  Last >>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Model</th>
<th>Qty</th>
</tr>
</thead>
</table>

<< Return  Next Step >>
The next step (Step 2) is to select the Installer and Seller. Use the drop-down menu to scroll to the Installer and Seller names. After they have been selected select the Add Equipment button.

**Equipment - Inverters**

After you have added the inverter(s), you will return to the Equipment Summary page and select the New Module link and complete the information for the modules.

**Equipment Summary**
Complete the same steps from the Inverter section to add equipment in the Module section.

Equipment has been added and the Project Status has changed to Ready to Submit. The Site Status is Complete. Select the Ready to Submit hyperlink in the Project Status box.

**Site Summary**

<table>
<thead>
<tr>
<th>Project Reservation</th>
<th>Site Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Information" /></td>
<td><img src="image" alt="Payment" /></td>
</tr>
<tr>
<td><img src="image" alt="Review" /></td>
<td><img src="image" alt="Review" /></td>
</tr>
<tr>
<td><img src="image" alt="Complete" /></td>
<td><img src="image" alt="Complete" /></td>
</tr>
</tbody>
</table>

- **Project**
  - Name:
  - Status: Ready to Submit
  - Expiration:

- **Incentive Levels**

- **Submission Date:**

- **Site**
  - ID:
  - Address/Name:
  - Status: Complete

- **Actions**
  - Submit
  - Cancel Submit
  - Withdraw
  - Return Unused Capacity

**Before submitting your Site for approval, please review the following statuses. Complete any items where status is Incomplete.**

- **Site Information**
  - Complete

- **Attachments**
  - Complete

- **Equipment**
  - Complete
Submit a Reservation Application

The Project Submit button has now been activated. If you are ready to submit your project, select the “Submit” button.

Project Summary

<table>
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<td>Review</td>
</tr>
<tr>
<td>Complete</td>
<td>Complete</td>
</tr>
</tbody>
</table>

- Project:
  - ID:
  - Type:
  - Applicant:
  - Incentive Levels
  - Submission Date:

- Name:
- Status: Ready to Submit
- Expiration:

- Project Notes

Before submitting your Project for approval, please review the following statuses. Complete any items where status is Incomplete.

- Project Information: Complete
- Attachments: Complete
- Sites: Complete

After you select the Submit button a pop-up message will appear.

Submit for Approval?

- Ok
- Cancel

If you are ready to submit, select the “Ok” button.

The Project Status has now changed to Submitted. If you want to cancel the submission of the application, select the Cancel Submit button. You can only cancel the submission before the project has been received by the Energy Commission.
The Energy Commission (CEC) will review your application and the documents that were attached to the application. **If additional information is needed, the CEC will notify you.**

While your application is being reviewed the statuses will change. Possible status changes are “Received”, “Plan Check Ready”, “Submitted to Plan Check”, “More Plan Check Information”, “Plan Check Approved”, and “Approved by Utility”.

When the project has been approved by the Energy Commission, the project status will change to “Approved by CEC”. The Project Summary will now be updated to include the following message: “See the Site Summary for any non-paid Site for additional actions.”

If the project is disapproved, the project status will change to “Disapproved” and the option to Re-Apply will appear under Actions.
Submit a Payment Claim

Select the “Complete Sites” button to review what additional information is required. This information is submitted after the solar installation is complete and certified.

Note: The sites must be submitted before the project expires. If the hard copy of the Payment Claim Form (NSHP-2) is sent and postmarked before the project is expired, this gives an additional 90 days to submit the site for payment.

Project Summary

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<tbody>
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</tr>
<tr>
<td>Complete</td>
<td>Payment</td>
</tr>
</tbody>
</table>

Project

ID: 
Type: 
Applicant: 
Incentive Levels
Submission Date:

Name: 
Status: 
Expiration:
Rebate Amount:

Actions:
Submit
Cancel Submit
Re-Apply
Plan Check Ready
Submit to Plan Check
Approve Plan Check
Plan Check More Information
Approve
Disapprove
More Information
Withdraw
Complete Expiration

Before submitting your Project for approval, please review the following statuses. Complete any items where status is Incomplete.

Project Information

Attachments

Sites

Complete

See the Site Summary for any non-paid site for additional actions.

In Site Information section, select the Complete Information button.
The following sections need to be completed:

- Permits
- System
- HERS

For definitions of each field go to Section 3: Creating a Site

After all of the required fields are completed, select the Save and Return button.
In the Attachments section, select the “Complete Attachments” button.

**Site Summary**

<table>
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<td>Review</td>
</tr>
<tr>
<td>Complete</td>
<td>Payment</td>
</tr>
</tbody>
</table>

**Project**

- **ID:**
- **Type:**
- **Applicant:** Incentive Levels
- **Submission Date:**

**Name:**

- **Status:** [Approved By CEC]
- **Expiration:**
- **Rebate Amount:**

**Site**

- **ID:**
- **Address/Name:**
- **Status:** ![Incomplete]

**Actions**

- Submit
- Cancel Submit
- Approve
- Disapprove
- More Information
- Withdraw
- Return Unused Capacity

Before submitting your Site for approval, please review the following statuses. Complete any items where status is Incomplete.

**Site Information**

- ![Complete]

**Attachments**

- ![Incomplete]
- ![Complete Attachments]

7 Site Document Attachment(s) are Required.

**Equipment**

- ![Complete]
You can either attach the documents in the web tool, or mail in the documents that are required to the Energy Commission. If you choose to mail in hard copies of all the documents, make sure you press the “Mail In” link for all the documents that you are providing.

*Note: Attachments have a size restriction. The document cannot be larger than 5 MB. You can break up the attachment into smaller sizes in order to submit via the web tool, or submit the entire attachment by mail.*

All documents with an asterisk are required, therefore you will need to attach or mail in all of those documents in order to submit the payment claim.

### Site Attachments

<table>
<thead>
<tr>
<th>Project Reservation</th>
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</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
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<td>Payment</td>
</tr>
</tbody>
</table>

**Project:**

- **ID:**
- **Type:**
- ** Applicant:**
- **Incentive Levels:**
- **Submission Date:**

**Name:**

- **Status:** Approved By CEC
- **Expiration:**
- **Rebate Amount:**

**Project Notes**

**Site**

- **ID:**
- **Address/Name:**
- **Status:** Incomplete

**Actions**

- Submit
- Cancel Submit
- Approve
- Disapprove
- More Information
- Withdraw
- Return Unused Capacity

**Guidebook Requirement**

1. Final Building Permit Runoff
2. Final Invoice Payment Proof / Final System Cost Documentation*
3. HERS EE Verification Forms CF-4R / CP-3R and NSHP EE-3*
4. HERS PV Verification Form CF-4R-PV / NSHP PV-3*
5. Interconnect Authorization Letter*
6. Lease / PPA Agreement
7. Maintenance & Monitoring Plan
8. Miscellaneous Forms (Including Revised CF-1R-PV’s)
9. NSHP-3 Warranty Form*
10. Payee Data Form*
11. Signed NSHP-2 Form (Must be mailed to Program Administrator)*
12. Utility Energy Efficiency Program Payment Approval Letter

Asterisks (*) next to any Document indicates that the Document is required.
In the Actions section select the Submit button.

Site Attachments

<table>
<thead>
<tr>
<th>Project Reservation</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>Project Notes</td>
</tr>
<tr>
<td>Review</td>
<td>Site Payment</td>
</tr>
<tr>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Sites</td>
<td></td>
</tr>
<tr>
<td>Review</td>
<td></td>
</tr>
<tr>
<td>Payment</td>
<td></td>
</tr>
</tbody>
</table>

- **Project**
  - **ID:**
  - **Name:**
  - **Type:**
  - **Status:** Approved By CEC
  - **Applicant:**
  - **Expiration:**
  - **Incentive Levels**
  - **Rebate Amount:**
  - **Submission Date:**

- **Site**
  - **ID:**
  - **Address/Name:**
  - **Status:** Ready to Submit

- **Actions**
  - Submit
  - Cancel Submit
  - Approve
  - Disapprove
  - More Information
  - Withdraw

Guidebook Requirement

1. Final Building Permit Signoff
2. Final Invoice Payment Proof / Final System Cost Documentation*
3. HERS EE Verification Forms CF-4R / CF-3R and NSHP EE-3*
4. HERS PV Verification Form CF-4R-PV / NSHP PV-3*
5. Interconnect Authorization Letter*
6. Lease / PPA Agreement
7. Maintenance & Monitoring Plan
8. Miscellaneous Forms (Including Revised CF-18-PV's)
9. NSHP-3 Warranty Form*
10. Power Data Form*
11. Signed NSHP-3 Form (Must be mailed to Program Administrator)*
12. Utility Energy Efficiency Program Payment Approval Letter

*Asterisks (*) next to any Document indicates that the Document is required
The application has been submitted and will be reviewed by the CEC. The Project status will now reflect Approved by CEC and the Site status will change to Submitted.

Site Attachments

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>Information</td>
<td>Review</td>
</tr>
</tbody>
</table>

- **Project ID:**  
- **Type:**  
- **Applicant:**  
  - Incentive Levels  
- **Name:**  
  - **Status:** Approved By CEC
- **Expiration:**  
- **Rebate Amount:**

- **Site ID:**  
- **Address/Name:**  
  - **Status:** Submitted

**Actions**
- Submit  
- Cancel Submit

**Guidebook Requirement**

1. Final Building Permit Signoff  
2. Final Invoice Payment Proof / Final System Cost Documentation*  
3. HERS EE Verification Forms CE-4R / CE-3R and NSHP EE-3*  
4. HERS PV Verification Form CE-4R-PV / NSHP PV-3*  
5. Interconnect Authorization Letter*  
6. Lease / PPA Agreement  
7. Maintenance & Monitoring Plan  
8. Miscellaneous Forms (Including Revised CE-1R-PVs)  
9. NSHP-3 Warranty Form*  
10. Power Data Form*  
11. Signed NSHP-2 Form (Must be mailed to Program Administrator)*  
12. Utility Energy Efficiency Program Payment Approval Letter

Asterisks (*) next to any Document indicates that the Document is required.
During the next review process, the CEC will review the payment claim. If it is complete and accurate, the Site status will change to Approved by CEC.

**Site Attachments**

<table>
<thead>
<tr>
<th>Project Reservation</th>
<th>Site Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image.png" alt="Image" /></td>
<td><img src="image.png" alt="Image" /></td>
</tr>
</tbody>
</table>

**Actions**
- Submit
- Cancel Submit
- Approve
- Disapprove
- More Information
- Withdraw
- Return Unused Capacity

**Guidebook Requirements**

1. Final Building Permit Signoff
2. Final Invoice: Payment Proof / Final System Cost Documentation*
3. MBES EE Verification Form / HBE EE-3*
4. MBES PV Verification Form / NSHP-PV-3*
5. Interconnect Authorization Letter*
6. Lease / PPA Agreement
7. Maintenance & Monitoring Plan
8. Miscellaneous Forms (Including Revised CFP6, PV’s)
9. NSHP-2 Warranty Form*
10. Power Data Form*
11. Signed NSHP-2 Form (Must be mailed to Program Administrator)*
12. Utility Energy Efficiency Program Payment Approval Letter

* Asterisks (*) next to any Document indicates that the Document is required
After all of the approvals have been completed, the rebate incentive will be scheduled for payment. After this has occurred, the Project and Site status will change to Finished.

**Project Summary**

<table>
<thead>
<tr>
<th>Project Reservation</th>
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<tr>
<td>Information</td>
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</tr>
<tr>
<td>Complete</td>
<td>Payment</td>
</tr>
</tbody>
</table>

**Partial Payment Option**

If your project is part of a Utility New Construction Energy Efficiency Program (e.g. CAHP, or California Advanced Homes Program), you have the option of requesting partial payments for your project.

To have this option become available to you, start a project as described in this document, but make sure the “Utility Energy Efficiency Program?” box is checked. You will also need to provide your program number. If you do not know this, contact your utility new construction program administrator.

---

**Project Description**

- **Name**: 
- **Address 1**: 
- **Address 2**: 
- **City**: [Select] 
- **State**: California 
- **Zip Code**: [Select] 
- **Electric Service Provider**: 
- **Utility Energy Efficiency Program?**: 
- **Residential New Construction Program Number**: 

---

34
Complete everything in the web tool the same as normal, with the exception of uploading EE documents (HERS EE Verification Forms CF-4R/CF-3R and NSHP EE-3). If the EE documents are uploaded or “mailed in,” the web tool will think you are trying to submit a full payment claim and the “Request Partial Payment” button will not become available. Upload/mail in all other documents with asterisks next to them as you would normally do.

### Site Attachments

<table>
<thead>
<tr>
<th>Project Reservation</th>
<th>Site Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="https://via.placeholder.com/150" alt="Image" /></td>
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<tr>
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<td><img src="https://via.placeholder.com/150" alt="Image" /></td>
</tr>
</tbody>
</table>

- **Project**
  - **ID:**
  - **Type:**
  - **Applicant:**
  - **Incentive Levels:**
  - **Submission Date:**

- **Site**
  - **ID:**
  - **Address/Name:**
  - **Status:**

- **Actions**
  - Submit
  - Cancel Submit
  - Approve
  - Disapprove
  - More Information
  - Withdraw
  - Return Unused Capacity
  - Request Partial Payment

### Guidebook Requirement

1. Final Building Permit Signoff
2. Final Invoice / Final Cost Documentation
3. HERS EE Verification Forms CF-4R / CF-3R and NSHP EE-3* (highlighted)
4. HERS EE Verification Form CE-2R and CE-3R
5. Interconnect Authorization Letter
6. Lease / PPA Agreement
7. Maintenance & Monitoring Plan
8. Miscellaneous Forms (Including Revised CE-1R-PV’s)
9. NSHP-3 Warranty Form
10. Payee Data Form
11. Signed NSHP-2 Form (Must be mailed to Program Administrator)*
12. Utility Energy Efficiency Program Payment Approval Letter

Asterisks (*) next to any Document indicates that the Document is required.

**DO NOT upload/mail in HERS EE Verification forms**
When you have these forms attached/mailed in, the “Request Partial Payment” button will become available to you.

### Site Attachments

<table>
<thead>
<tr>
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<td>Sites</td>
</tr>
<tr>
<td>Review</td>
<td>Payment</td>
</tr>
</tbody>
</table>

#### Project

- **ID:**
- **Type:**
- **Applicant:**
- **Incentive Levels:**
- **Submission Date:**

#### Site

- **ID:**
- **Address/Name:**
- **Status:**

#### Actions

- Submit
- Cancel Submit
- Approve
- Disapprove
- More Information
- Withdraw
- Return Unused Capacity
- Request Partial Payment

#### Guidebook Requirement

1. Final Building Permit Signoff
2. Final Invoice Payment Proof / Final System Cost Documentation*
3. HERC EE Verification Forms CF-4R / CF-9R and NSHP EE-3*
4. HERC PV Verification Form CF-4R-PV / NSHP PV-3*
5. Interconnect Authorization Letter*
6. Lease / PPA Agreement
7. Maintenance & Monitoring Plan
8. Miscellaneous Forms (Including Revised CF-1R-PV’s)
9. NSHP-3 Warranty Form*
10. Payee Data Form*
11. Signed NSHP-2 Form (Must be mailed to Program Administrator).*
12. Utility Energy Efficiency Program Payment Approval Letter

* Asterisks (*) next to any Document indicates that the Document is required.
Once the partial payment has been requested, a message will be shown next to the site’s status.

**Site Search**

<table>
<thead>
<tr>
<th>Project Reservation</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
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<td>Review</td>
</tr>
<tr>
<td>Complete</td>
<td>Payment</td>
</tr>
</tbody>
</table>

- **Project**
  - ID:
  - Type:
  - Applicant:
    - Incentive Levels
  - Name:
  - Status: Approved By CEC
  - Expiration:
  - Rebate Amount:

**Search Criteria**

- Administrator: [All]
- Site Name, Address or ID: [Select]
- Status: Not Deleted

1 of 1 Sites Entered
1 of 1 Sites Entered
Records Found: 1
Records Per Page: 10

1. Address or Name: □
   - Status: Received 1st Partial Payment

After the partial payment has been approved, then the applicant will be able to request a final partial payment. Once that is requested, the applicant must provide the EE documents via attaching or hitting the mail in button. Once that is uploaded/mailed in, then the applicant can resubmit the site for a final payment approval. The CEC will then re-review the final partial payment as a full payment claim. If everything is in order and accurate, it will be approved as described in the steps above for submitting a payment claim.