



## CLEAN ENERGY HOMES



# Clean Energy Homes Program Participant Handbook

Version 1

**Prepared for:**

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**Submitted by:**

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# 1 Introduction and Background

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The Clean Energy Homes (CEH) program works toward achieving the state's goals for reducing GHG emissions and promoting environmental equity. The Program provides incentives to low-income housing developers to incorporate innovative low-carbon technologies and building practices into the designs of residential multifamily new construction buildings. The Program aims to make it easier for developers to participate in customer programs and build all-electric, affordable homes by removing barriers and providing support during key stages of the affordable housing development process. CEH will enable developers to access a wide range of innovative low-carbon technologies, building practices, and resident educational resources, allowing them to choose the most cost-effective and beneficial options for residents. The CEH program provides funding for all-electric homes from 2022–2026, as funding is available. The Program is limited to qualifying low-income housing projects. CEH will allocate incentive funding on a first-come, first-served basis for applications that meet all program and eligibility requirements.

The Program consists of three main offerings:

- **Design Incentives and Assistance:** CEH will provide technical design assistance at critical stages of the development process. This assistance is intended to help alleviate initial delays and design costs and may also help developers become eligible to participate in additional applicable programs that can both reduce GHG emissions and reduce utility bills. Incentives are available per bedroom to offset design costs ranging from \$1,500 to \$2,500, depending on the climate zone. The Program provides incentives of up to \$50,000 per affordable housing developer or unique design to develop all-electric, affordable homes.
  - Design assistance activities include but are not limited to:
    - A minimum of two design reviews per project.
    - Additional technical assistance as needed.
- **Resident Education and Outreach Incentives:** CEH provides participating housing developers with up to \$25,000 per affordable housing project to connect with residents and educate them on the benefits of renting a home in an all-electric building. Developers may use these funds for community and in-unit-based resident education activities, including walk-throughs with residents, communication materials such as educational signage, community education events, and instructional or memory aids such as refrigerator magnets that

communicate how residents can keep their bills low. Developers must submit requests to claim these incentives within a year of the approved reservation.

- **Technical Assistance (TA):** The Program offers technical assistance to a wide range of applicants in different forms.
  - General TA: Support can be provided to multifamily stakeholders, including but not limited to energy consultants, architectural firms, mechanical, electrical, and plumbing (MEP) engineering firms, government entities, and housing advocacy groups. All-electric design support for multifamily new construction development will provide insights on low-emission building design, incentive availability, and low-emission technologies.
  - Project-Specific TA: Provide support for affordable new construction developments on project-related building code requirements, design review and consultation, incentive layering, energy consultation, and system design and sizing review.
  - Application support: Aid with incentive claim package completion, incentive reservation completion, and program intake.

At this time, there is no limit to the amount of technical assistance any single developer of low-income projects or multifamily stakeholder may receive. TA is available to the applicants as requested.

## 2 Program Eligibility Criteria

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Projects must meet all the following eligibility criteria, described below:

- New residential housing
- All-electric
- Low-income
- Eligible service territory
- Energy Efficiency Requirements

Eligible participants in the Program are defined as follows:

**Applicant:** The Applicant is the one who applies for and can receive the incentives. This is a low-income housing Developer or Property Owner that develops an affordable housing Project within the Program Eligible Territory. CEH applicants for incentives may be Property Owners or Developers only. Consultants may apply on behalf of eligible applicants. Consultants will need to provide information regarding the eligible applicants and work with the eligible applicants to submit the proper paperwork.

**Participant:** A stakeholder deemed qualified by the Program Implementer to participate in the Program. The Participant must work on affordable housing projects in some capacity within the eligible service territory or on a project eligible for incentives. CEH participants for technical assistance may be working with residential stakeholders that may include but not be limited to building owners and developers, consultants, architects, engineers, design team members and local jurisdictions to support advancement of all-electric new construction.

### New Residential Building Requirement

The Program defines a new residential building eligible for participation as one of the following:

- A building that has never been used or occupied for any purpose<sup>1</sup>
- An existing residential building where 100% of the exterior walls have been stripped down to the studs and all equipment has been replaced
- An existing building or structure that has been added to, remodeled, repaired, renovated, or altered to the point that 50% or more of the exterior weight-bearing walls have been removed or demolished<sup>2</sup>
- An existing building repurposed for housing whose original use was not residential

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<sup>1</sup> Section 100.1 of Part 6 of Title 24 of the California Code of Regulations (California Energy Code).

<sup>2</sup> Chapter 15.06.030 Section R202 of the California Residential Building Code.

Eligible new residential building types may include:

- Multifamily buildings
- Dormitories
- Residence hotels
- Assisted living facilities
- Homeless or transient housing
- Multi-unit farmworker housing

## All-Electric Requirement

The Program strictly limits project eligibility to new residential buildings that are all-electric and have no hookup to the gas distribution grid. Projects in municipalities with requirements or preferences for all-electric new construction are eligible for CEH incentives. The all-electric requirement includes the following criteria:

- a. New residential buildings cannot have gas service lines installed in the building from any main gas lines located on-site that preexist the construction of the project.
- b. Existing buildings must cap or remove the gas lines connected to the building.
- c. Outdoor community spaces not attached to the building envelope (for example, BBQs, fire pits) are excluded from the all-electric provision.

## Low-Income Residential Housing Requirement

The CEH program is available to low-income, deed-restricted multifamily development projects. The Program defines a multifamily development as a property with five or more units<sup>3</sup> that is operated to provide deed-restricted low-income residential housing.<sup>4</sup>

Affordable housing multifamily developments with a regulatory agreement, deed restriction, or restrictive covenant either anticipated or already recorded will be eligible for design assistance and incentives. This allows for flexibility to offer technical assistance prior to recording of the agreement for projects that do not already have restrictions reflected on Title. An enforceable funding commitment from a lender that has verifiable affordability restrictions to be required of the project can be submitted in anticipation of said restrictions.

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<sup>3</sup> For example, a property comprised of six rental duplexes would be considered multifamily as there are more than five units on the property.

<sup>4</sup> Low-income housing must be provided as described in clause (i) of subparagraph (A) of paragraph (3) of subdivision (a) of [Section 2852 of the Public Utilities Code](#).

Based on market demand, the pilot may consider testing an approach to serve naturally occurring affordable housing. Any such approach would ensure the long-term affordability of the project.

## Eligible Service Territories Requirement

Within SCE Service Territory, this program defines eligible geographic areas as those that: (1) do not receive service from any of the investor-owned gas utilities. These areas include but are not limited to Long Beach, Vernon, Catalina Island, and portions of Inyo and Mono counties; or (2) consist of properties or buildings that do not meet the Building Initiative for Low Emissions Development (BUILD) program's low income/disadvantaged communities' definition; or (3) consist of properties or buildings that do not meet BUILD's requirements.<sup>5</sup>

## Energy Efficiency Requirements

The project must meet minimum code-compliant efficiencies for space conditioning and water heating where the standards are applicable. If a project chooses to specify a specific heat pump system type that does not adhere to the standard below, the Program will still deem the system eligible to install.

*Table 1. Minimum Efficiency Requirements for CEH Design Incentives*

Energy End Use	Core Technologies	Minimum Requirements
Space Conditioning	Heat Pump HVAC*	HSPF ≥ 10 (non-ducted) HSPF ≥ 9 (ducted)
Water Heating	Unitary Heat Pump Water Heater	NEEA Tier 3 <sup>6</sup> or JA13. 120v are eligible regardless of NEEA tier
	Central On-site Heat Pump Water Heater	Minimum manufacturer rating

\*This excludes equipment such as PTHP, SPVHP, or unitary through-wall or ceiling heat pumps that do not have an HSPF rating.

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<sup>5</sup> D. 21-06-015, page 389. Other Utilities include Southern California Gas, Pacific Gas and Electric, San Diego Gas and Electric, and Southwest Gas.

<sup>6</sup> [2019 Building Energy Efficiency Standards webpage](https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/2019-building-energy-efficiency), <https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/2019-building-energy-efficiency>

<sup>6</sup> [NEEA Advanced Water Heating Specification](https://neea.org/img/documents/Advanced-Water-Heating-Specification.pdf), <https://neea.org/img/documents/Advanced-Water-Heating-Specification.pdf>

## 3 Program Offerings

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The CEH program aims to encourage the design and construction of energy-efficient buildings, with benefits that include reduced energy utility bills for the occupants and improved comfort, safety, and indoor air quality. CEH does this through three offerings:

- Design assistance and incentives
- Resident education incentives
- Technical assistance

### Design Assistance and Incentive

The CEH program has a design incentive structure to assist developers and project teams in the developmental stage with the design of all-electric buildings. The incentives support the administrative costs associated with assessing the inclusion of electrification technologies, including but not limited to energy efficiency and demand response measures, electric battery storage, and others in all-electric design.

CEH caps design incentives at \$50,000 per developer or unique design. A developer can receive design assistance from CEH independent of the design incentive. The Program defines a developer as the owner of record (a limited liability corporation or a single developer). In the case of a CDLAC/LIHTC application, the developer is the parent company for the development.

### Requirements

To be eligible for design incentives, projects must:

- Apply for assistance and incentives prior to submitting a building permit
- Meet or exceed the eligibility criteria
- Meet efficiency thresholds, if applicable
- Engage in a minimum of two design reviews with the program team prior to building permit submission

The Program will require the developer to participate in two design reviews with the program team prior to building permit submission. The intention of these reviews is to provide technical support, review overall design and equipment specifications, provide feedback, and recommend best practices for all-electric buildings to build the capacity of the design teams to execute future projects.

### Incentive Structure

The Program offers incentives at a per-bedroom rate to help offset design costs. CEH classifies studios as one-bedroom units. Table 3 shows the allocation of design incentives per bedroom by climate zone.



Table 2. Southern California Edison (SCE) CEH Program Incentive Structure

SCE Climate Zone	Incentive per bedroom
5, 6, 8, 9, 13, and 14	\$2,000
10 and 15	\$1,500
16	\$2,500

The incentive payment structure will be as follows:

- The Program pays 50% of design incentives at permit approval
- The Program pays the remaining 50% of design incentive at foundation pour or completed utility work

The intention behind the staggered payments is to offset some of the design costs closer to the time of the cost incursion. The second payment at foundation pour provides confidence that projects going through construction will be all-electric. CEH reserves the right to adjust allocation of the design incentives in response to market conditions.

## Resident Education Incentives

The Program provides participating housing developers and owners with up to \$25,000 per affordable housing project to educate prospective and existing residents on the benefits of renting a home in an all-electric building.

The timeline for a multifamily development, from permit approval to completion and full occupancy, can be as long as four years. Given the long timeline of multifamily development and the goal of benefiting residents living in all-electric multifamily buildings, projects eligible for this incentive are generally one of the following:

- Projects that are receiving design assistance incentives through the CEH program; and
- All-electric projects that are not eligible for design incentives under the Program because they were recently completed or are under construction in the eligible geographies. These projects must be all electric, but the efficiency criteria may not apply given these projects did not undergo CEH design assistance and may have been permitted under other code cycles and have met those requirements.

The Program has developed guidelines for qualifying activities and associated documentation required for incentive submittals. The program team reserves the right to add and/or remove activities offered in the future to respond to market conditions. A complete list of eligible activities may be found in the [Resident Education Guidelines](#).

The developer can submit a request for incentives based on the amount expended on an activity once it is completed, until they reach the cap of \$25,000 per development. Specifics on eligible expenses and required documentation can be found in the [Resident Education Guidelines](#).

Educating the maintenance and property management staff is critical to ensuring participating projects realize anticipated benefits and systems receive proper maintenance. Without education and training, maintenance staff may modify the control and/or system configuration and inadvertently negatively impact system performance. To complement resident education, the Program offers operations and maintenance training for projects receiving resident education incentives. This training prioritizes projects with central systems. Projects receiving the resident education incentive will also receive onsite operations and maintenance training for projects that are completed within the CEH program timeframe. For projects that receive resident education but cannot be completed within the Program timeframe, the Program will issue a maintenance and operation guide. CEH program staff will engage with property staff on this opportunity and determine the appropriate path.

## Technical Assistance

Technical assistance is available broadly to multifamily stakeholders serving affordable multifamily housing within eligible territory to further educate, assist, and encourage the adoption of electrification and decarbonization through building design.

Technical assistance includes design assistance for project owners, developers, and multifamily stakeholders to explore project designs and overcome any technical challenges encountered in developing an all-electric residential project.

CEH participants can apply for three types of technical assistance:

- General TA: All-electric design for multifamily new construction development to provide inputs on low-emission building design, incentive availability, and low-emission technologies. The Program can provide general TA to multifamily stakeholders, including but not limited to developers, energy consultants, architectural firms, mechanical, electrical, and plumbing (MEP) engineering firms, government entities, and housing advocacy groups.
- Project-Specific TA: Provide support for affordable new construction developments on project-related building code requirements, design review and consultation, incentive layering, energy consultation, and system design and sizing review.
- Application support: Aid with incentive claim package completion, Incentive reservation completions, and program intake.

The Program does not limit the technical assistance funds that it provides to any single developer of low-income projects or multifamily stakeholder at this time. TA is available to the applicants as requested.

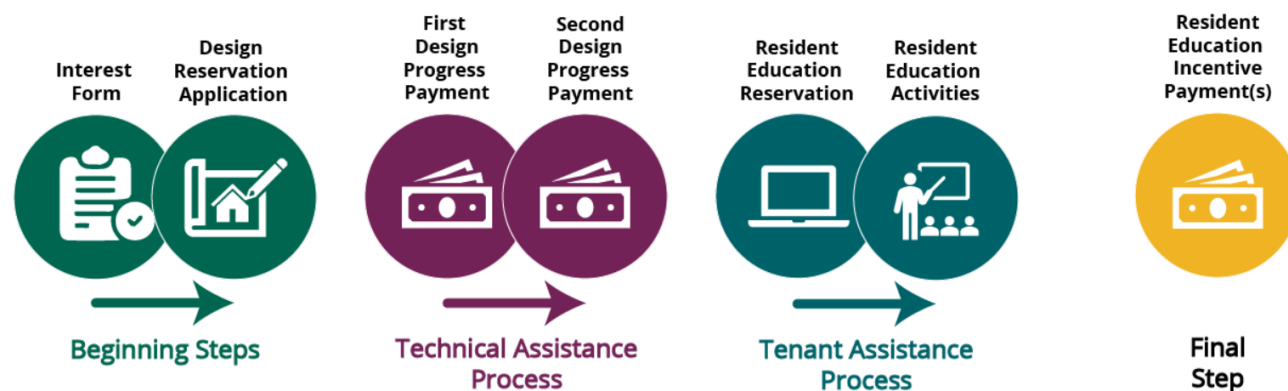
The process for applying for program offerings and services is described in section 4.

## 4 Program Participation Process

### Participation Overview

The Program engages participants at all stages of construction, including design, construction, and completion. The figure below summarizes the participation process.

Table 3. Participation Process



Program participation includes the following steps:

#### 1. Submitting interest form:

Upon reviewing all the eligibility criteria, the applicant submits an [interest form](#), after which the applicant receives correspondence from the program team to schedule an intake call. The interest form includes an agreement on terms and conditions.

#### 2. Intake call:

The intake call allows the applicant to discuss their project, confirm eligibility, and determine what form of assistance they require. For project-specific technical assistance and design incentives, the program team coordinates with the developer on the project design timeline, determines the schedule for design reviews, and requests project plans and other supporting documentation.

#### 3. Submitting reservation application:

After determining which program offerings to pursue, the applicant submits a reservation form for design incentives and/or education incentives. The program team sends the form links to the applicant via a follow-up email after the intake call. Prospective program participants need to submit a program incentive reservation and supporting documentation during the design stage before building permit submission, signaling a commitment to build all-electric housing consistent with the goals and requirements of the CEH program and reserving funds.

The CEH program team is available to provide technical assistance for eligible participants by providing design assistance, application assistance, confirming required application documentation, and/or linking to program resources. Following reservation approval, the program team will reserve the design incentive, allowing the applicant to proceed with design and permit documents. In addition, this will allow the team to schedule design reviews.

There are two pathways for eligible applicants to pursue the resident education incentive:

**Pathway 1:** Projects that are receiving design assistance incentives through the Program

Projects that have completed a design assistance application and have received approval from the program are only required to provide additional information and documents associated with the resident education incentive application, as identified by staff.

**Pathway 2:** Projects that recently completed construction or are in the process of completing construction within the eligible geographies for the Program

Projects that have not completed a design assistance application must complete a resident education incentive application, which may include the same information required in the design incentive application.

**4. Review and approval of reservation:**

The program team will review incentive reservation forms. Applicants may receive a request for additional or clarifying information. Once the Program has approved the reservation incentive, it will reserve those funds for the project, and the property will receive an email with the next steps. With this notice to proceed, the project can then proceed with design assistance or resident education activities.

**5. Complete activities:**

Based on the specific reservation, the project will complete design activities or resident education activities in alignment with program requirements. Upon completion of specific milestones such as a permit, foundation pour, or completed resident education activity, the property owner will send a request for claim submission. The program team will email a claim form for applicants to complete. This claim form will be pre-filled with owner and property information, requiring some fields to be updated prior to submission for reimbursement.

**6. Incentive payment claim submission:**

The applicant will complete all necessary information for the claim form and provide appropriate supporting documentation. See below for more details on specific claim submissions.

**Design incentive claim:** The Program distributes the design incentive payment in two intervals. The first payment will occur upon permit approval.

Upon program team approval of the design reservation and completion of two design reviews, applicants may request reimbursement of eligible incurred costs up to 50% of the incentive value or actual eligible costs, whichever is less. The program team provides applicants with an incentive claim form to complete and submit. To receive an incentive payout, the applicant must submit the following documents for program team review:

- Incentive claim request form
- Permit approval letter or copy of permit
- PRF-01 to confirm all electric and basic project details
- Plan sets (with MEP) to confirm number of bedrooms and all electric status
- Affordability documentation
- ACH and W-9 for payment

The second payment will occur at foundation pour, when applicants may request reimbursement of eligible incurred costs up to the remainder of the incentive value. The applicant will complete and submit a claim form. To receive an incentive payout, the applicant must submit the following documents for staff review:

- Incentive claim request form
- Photo of the signed-off permit for foundation work or other documentation of foundation pour

**Resident Education Claim:** Applicants can receive resident education incentive payment installments when they complete each specific resident engagement activity. There is no limit to the number of payments. The incentives are capped at \$25,000 per development. The Program can pay incentives on an incremental basis in accordance with completed eligible activities. A project can draw down the reservation of \$25,000 over six months.

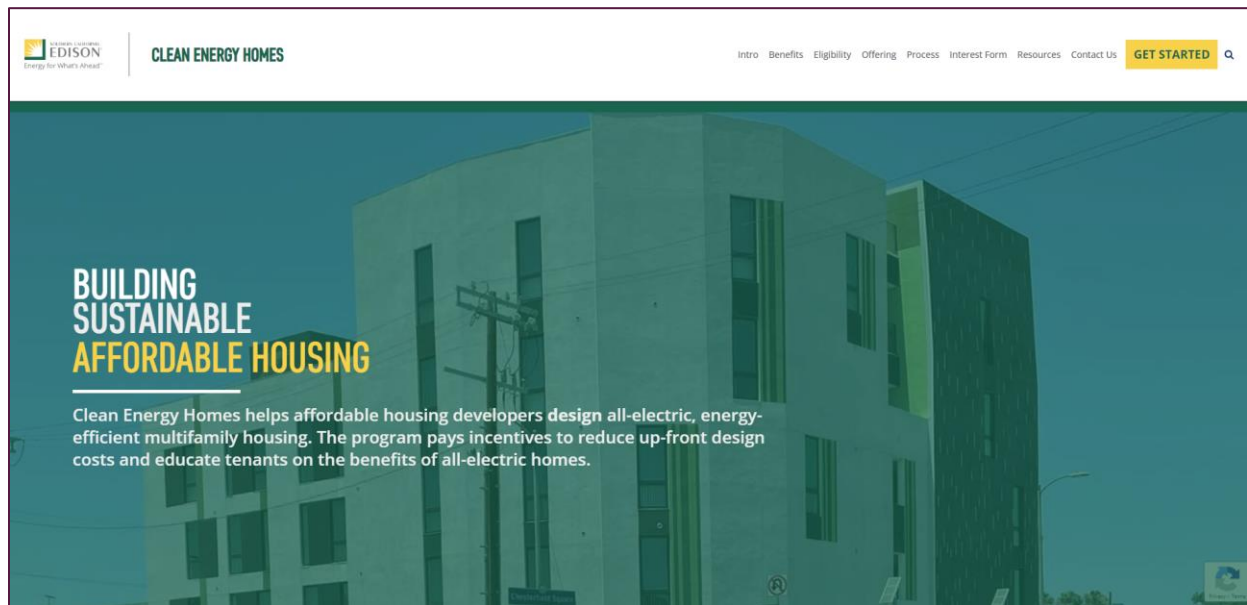
To receive payments, applicants must submit the following:

- Incentive claim request
- Paid invoices for qualifying activities
- Sample installation photos
- Required activities for sign-off, as described in the Resident Education Guidelines

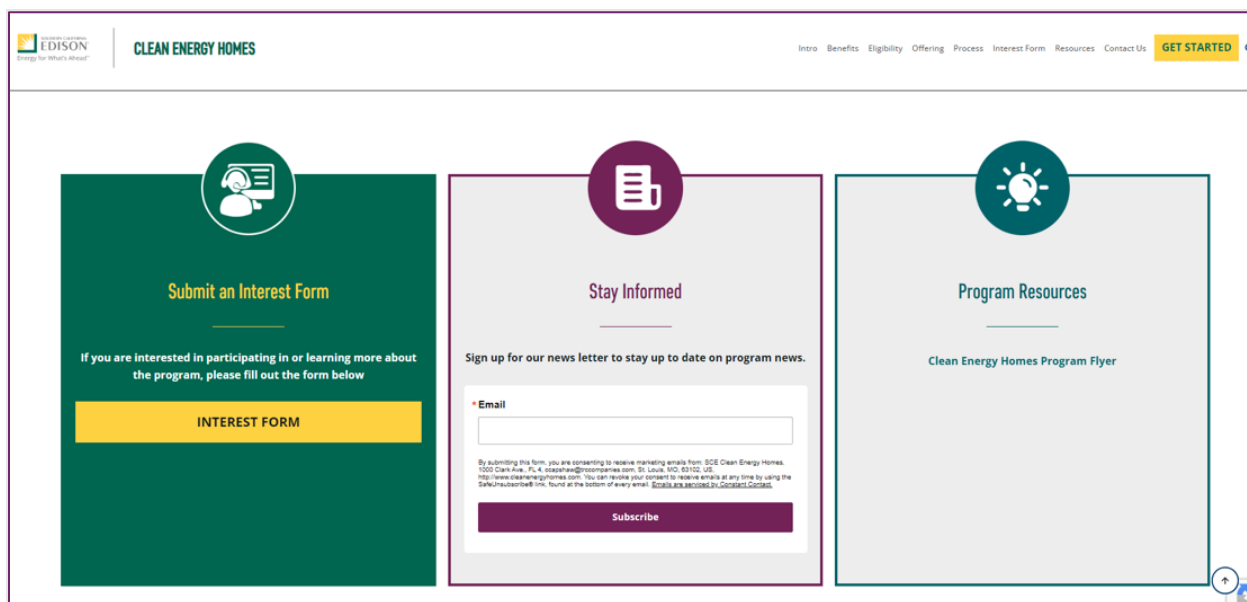
# Step-by-Step Instructions

## 1. Interest form

Visit the Program website at <https://cleanenergyhomes.com/> to get started.



Navigate to the [interest form](#) near the bottom of the web page and click the yellow box to submit an interest form.



Fill in information about your request. If you are interested in the incentive offerings, submit the property owner's contact information.

Clean Energy Homes Program Interest Form

Primary Contact

Please complete the following information. The Applicant is the Property Owner or Developer applying for incentives. Consultants may apply on behalf of eligible applicants and will need to provide additional paperwork at a later date.

First Name \*

Last Name \*

Title \*

Email \*

Phone \*

Applicant's Project Role \*

Company \*

Organization Type \*

Business Type \*

Technical Assistance Request

General Electrification Support is available to all multifamily affordable housing stakeholders.

What type of technical assistance are you interested in? \*

☐ General Electrification Support

☐ Project Specific Support

Additional Information

Please provide any additional information about this project to help us determine your eligibility.

☐ I hereby certify that, I work on multifamily affordable housing in the CEH eligible service territory and the provided information is true and accurate, to the best of my knowledge.

Once you have submitted the interest form, you and any alternate contacts will receive an automatic confirmation email with the CEH ID specific to your request. This ID will be associated with the project throughout the whole participation process.

[External] Your request for the SCE CEH Program has been received.

CP

CEH Program <cehprogram@aea.us.org>

To

Ari Usher

Cc

CEH Program

Reply

Reply All

Forward

Wed 8/30/2023 5:17 PM

Ari,

Thank you for your interest in the SoCal Edison Clean Energy Homes Program (SCE CEH).

Your request is under review and a representative will contact you within 3 business days for additional information or to schedule an intake call.

Application Summary

Company:

Development Co

Applicant:

Ari Usher

Title:

senior associate

Email:

[ausher@aea.us.org](mailto:ausher@aea.us.org)

Phone:

(510) 831-6813

TA Request:

Project Specific Support

Property Name:

123 project

Additional Information:

Clean Energy Homes ID:

CEH-23000069 (This ID is used for submitting TA requests)

Please use the [TA Request Form](#) when submitting correspondence related to this Clean Energy Homes reservation.



CEH program staff will review your request and get back to you with the next steps within three business days.

You can ask questions at any time by replying to the email or submitting a request via the link at the bottom of the email. This link is unique to your request and will be included in subsequent emails as well to aid in communication.

**Clean Energy Homes ID:** CEH-23000069 *(This ID is used for submitting TA requests)*

Please use the [TA Request Form](#) when submitting correspondence related to this Clean Energy Homes reservation.

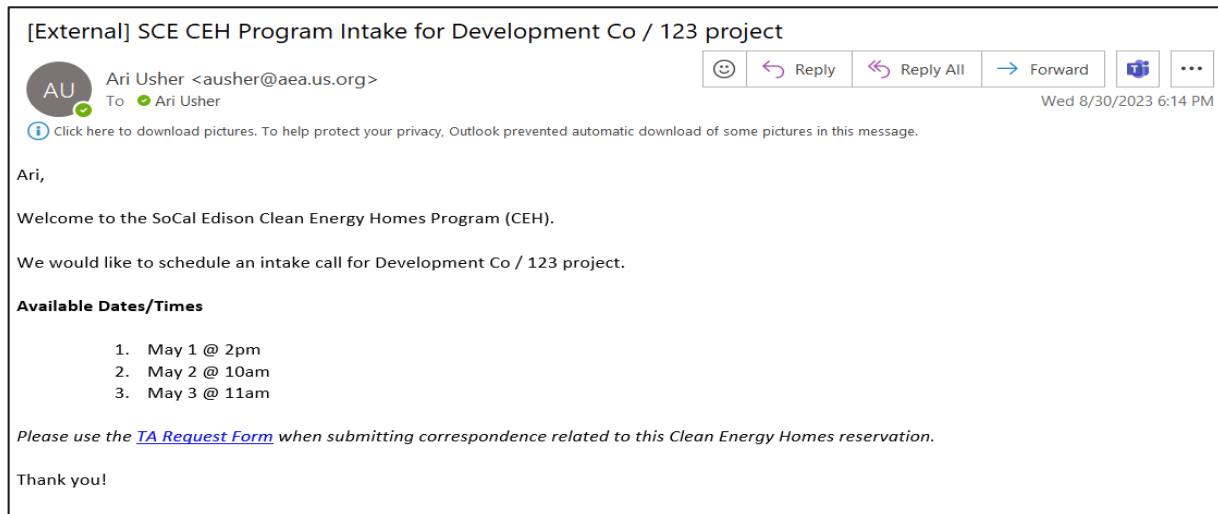
Thank you!

The form includes a pre-defined list of options to identify the type of request submitted and ensure an appropriate response. Please select from a pre-populated topic list or select "other."

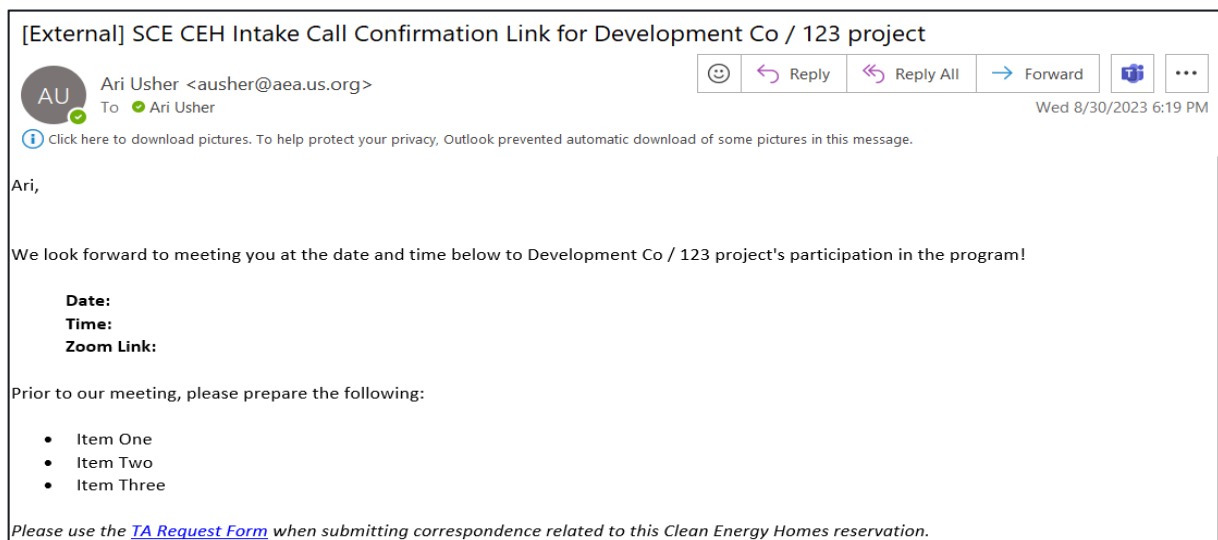
Technical Assistance Request Form			
<b>Applicant</b>			
Reservation ID	First Name	Last Name	Email
CEH-23000069	Ari	Usher	ausher@aea.us.org
Role			
Property Owner			
<b>Technical Assistance Request</b>			
Please use this form for submitting all technical assistance requests, forms, meeting requests, incentive claims and closeout requests.			
Topic *			
Please select... ▾			
Description *			
<div></div>			
Upload a File			
<div>Choose File</div> No file chosen			

## 2. Intake call

Within three business days, CEH staff will reach out by email to schedule an intake call, during which the program team will provide a thorough overview of the Program, assess your specific needs, identify appropriate or eligible program offerings, and answer questions.

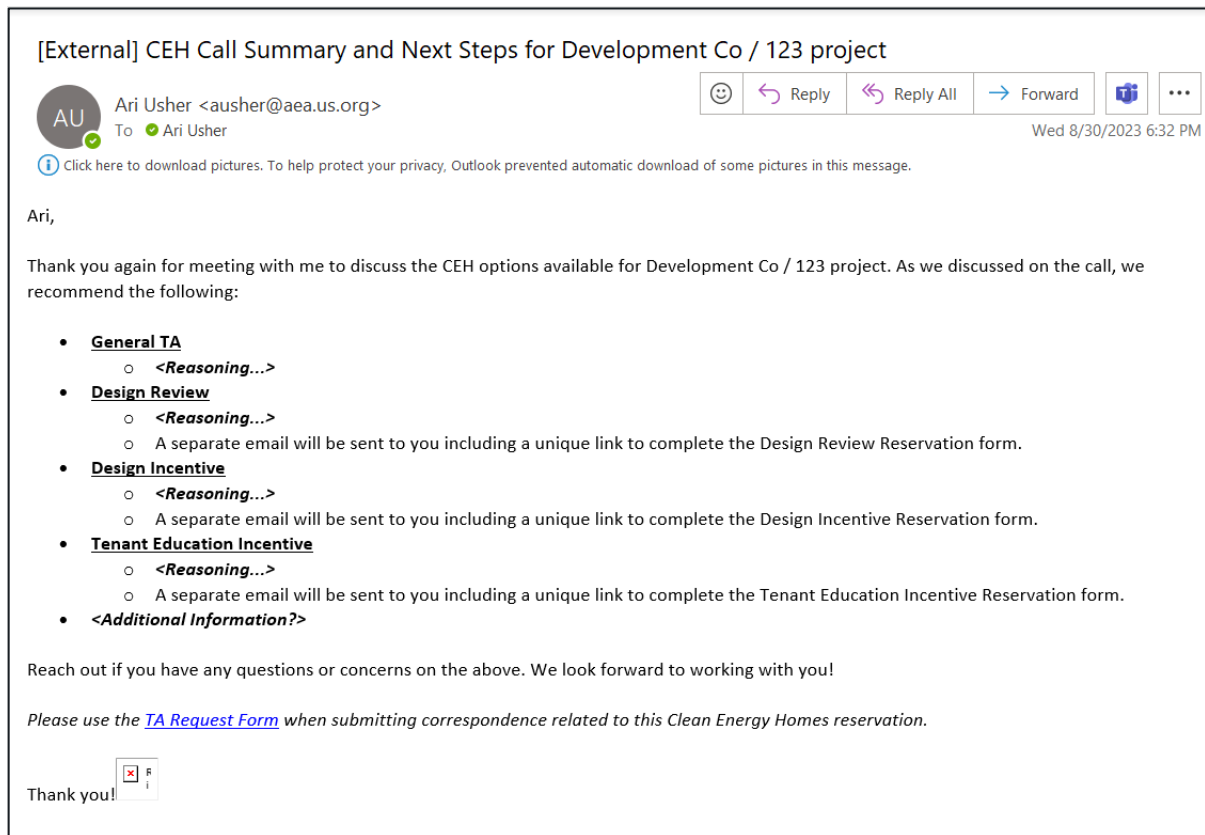


You can confirm the time that works for you by replying directly to the email or submitting a TA request using the link at the bottom of the email. Once confirmed, you will receive a Zoom invite for the selected time. Please feel free to forward the invitation to any members of your team that you would like to attend.



During the intake call, the program team will work with you to determine the best way to make use of the Program offerings for your request. For more information on program offerings, refer to [Program Offerings](#).

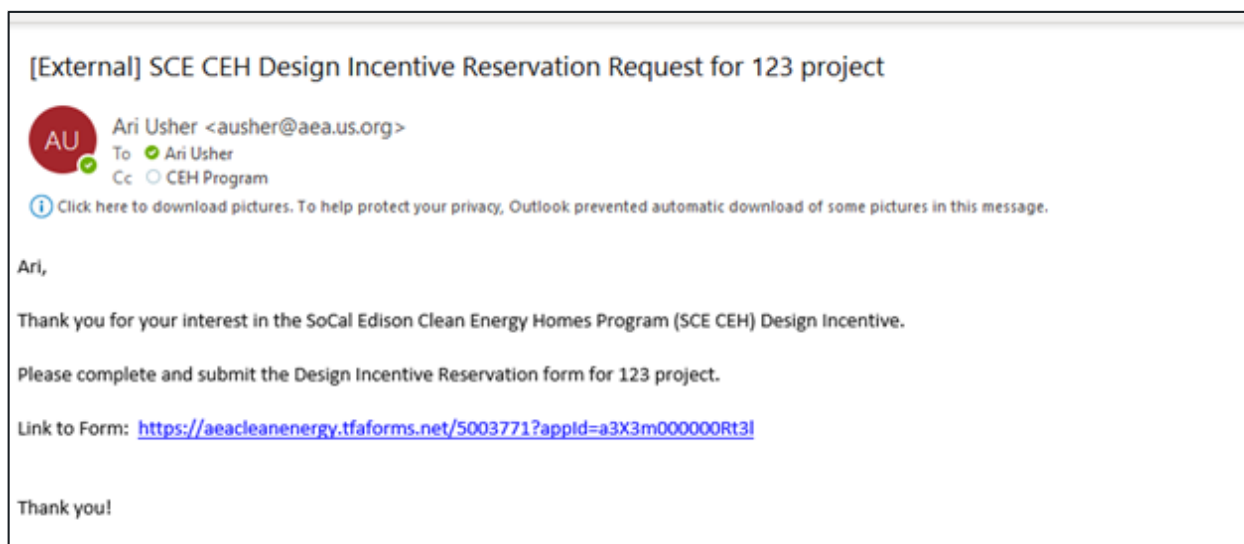
After the intake call, you will receive an email with a summary of the recommendations for your request and next steps.



As always, feel free to contact us at any time by submitting a [TA request](#) using the link at the bottom of the email, or replying directly to the email.

### 3. Design reservation form

After the intake call, if program staff deem the project eligible for the design incentive, you will receive a separate email including a unique link to complete the design incentive reservation form.



The form will be pre-populated with information submitted in the interest form and collected during the intake call.

### Design Incentive Reservation Form

**Applicant**

First Name <input type="text" value="David"/>	Last Name <input type="text" value="Avina"/>	Title <input type="text"/>
Email <input type="text" value="davina@aea.us.org"/>	Phone <input type="text"/> <small>Please enter numbers only</small>	Project Role <input type="text" value="Property Owner"/>
Company <input type="text" value="Test Company"/>	Organization Type <input type="text" value="Private"/>	Business Type <input type="text" value="Affordable Housing Developer"/>

Complete the form to submit your reservation for review. The CEH support team will review your reservation and get back to you within three business days.

#### 4. Design reservation review and approval

Program staff may require clarifications on your design reservation if the information is not adequate to assess eligibility. In this case, the project contact and any alternate contacts provided will receive a clarification email. Once program staff have verified all project eligibility information, they will approve your design reservation. You will receive an email notifying you of the approval decision.

[External] CEH Design Incentive Approved: <Applicant ID>

Ari Usher <ausher@aea.us.org>

To: Ari Usher

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear Ari,

Congratulations! Development Co's Property, 123 project, has been approved for the Clean Energy Homes (CEH) Design Incentive.

CEH Design Incentives can amount up to \$50,000 per affordable housing developer to design all-electric, affordable homes. **<Include project specific estimate for incentives total?>**

Examples of what this can include are:

- A minimum of 2 design reviews pre-project.
- Additional Technical assistance as needed.
- Incentives are available per bedroom to offset design costs ranging from \$1500 - \$2500\*.
  - \*This range depends on the project's climate zone.*

My name is and I will be your CEH TA for this project. The CEH Application ID for this property is CEH-23000069.

The reservation earmarks funds in the Program for your project so that you may claim them upon completing the required milestones. The reservation term is 12 months after the final reservation form approval date, with the potential for a six-month extension; see terms and conditions for more details.

## **5. Design review**

Projects participating in the CEH design incentive offering will receive a minimum of two design reviews from program staff, both of which must take place before a participant can claim the incentive funding. CEH program staff suggest that participants complete the first design review as early as possible within the project schedule to ensure the maximum usefulness of recommendations. The second review can occur closer to the permit submission to support a comprehensive final plan set.

## **6. Design incentive claims**

The Program will pay out design incentives at two milestones. Submit Claim 1 for 50% of the total amount once the building permit is approved and issued. Submit Claim 2 for the remaining 50% once the foundation is poured.

Once the estimated building permit submission date from the reservation form approaches, the Program will automatically send an email to the project contact and alternate contacts, prompting you to submit the initial claim.

**Design Incentive Claim Form**

**Applicant**

First Name

David

Last Name

Avina

Title

Email

davina@aea.us.org

Phone

Please enter numbers only

Project Role

Property Owner

Company

Test Company

Organization Type

Private

Business Type

Affordable Housing Developer

**Property Details**

Property Name

Street Address

City

State

You may also initiate a claim by submitting a TA request through the link at the bottom of all program emails. Submit a request with the topic "Design Incentive Claim."

**Technical Assistance Request Form**

**Applicant**

Reservation ID

CEH-23000071

First Name

David

Last Name

Avina

Email

davina@aea.us.org

Role

Property Owner

**Technical Assistance Request**

Please use this form for submitting all technical assistance requests, forms, meeting requests, incentive claims and closeout requests.

Topic \*

Please select...

Description \*

Upload a File

Choose File no file selected

Submit Request

Technical assistance is available throughout the whole process by submitting a TA request using the link at the bottom of program emails or by reaching out to CEH team directly.

## 7. Resident education process

Projects that are only pursuing resident education incentives or projects nearing construction completion follow the next set of steps for the submission of resident education incentives. A high-level summary is included below. This handbook will be revised in future to include detailed step by step process for resident education incentives.

The program team will use the intake call to determine when a project is a good candidate and eligible for resident education incentives. If the project is only utilizing resident

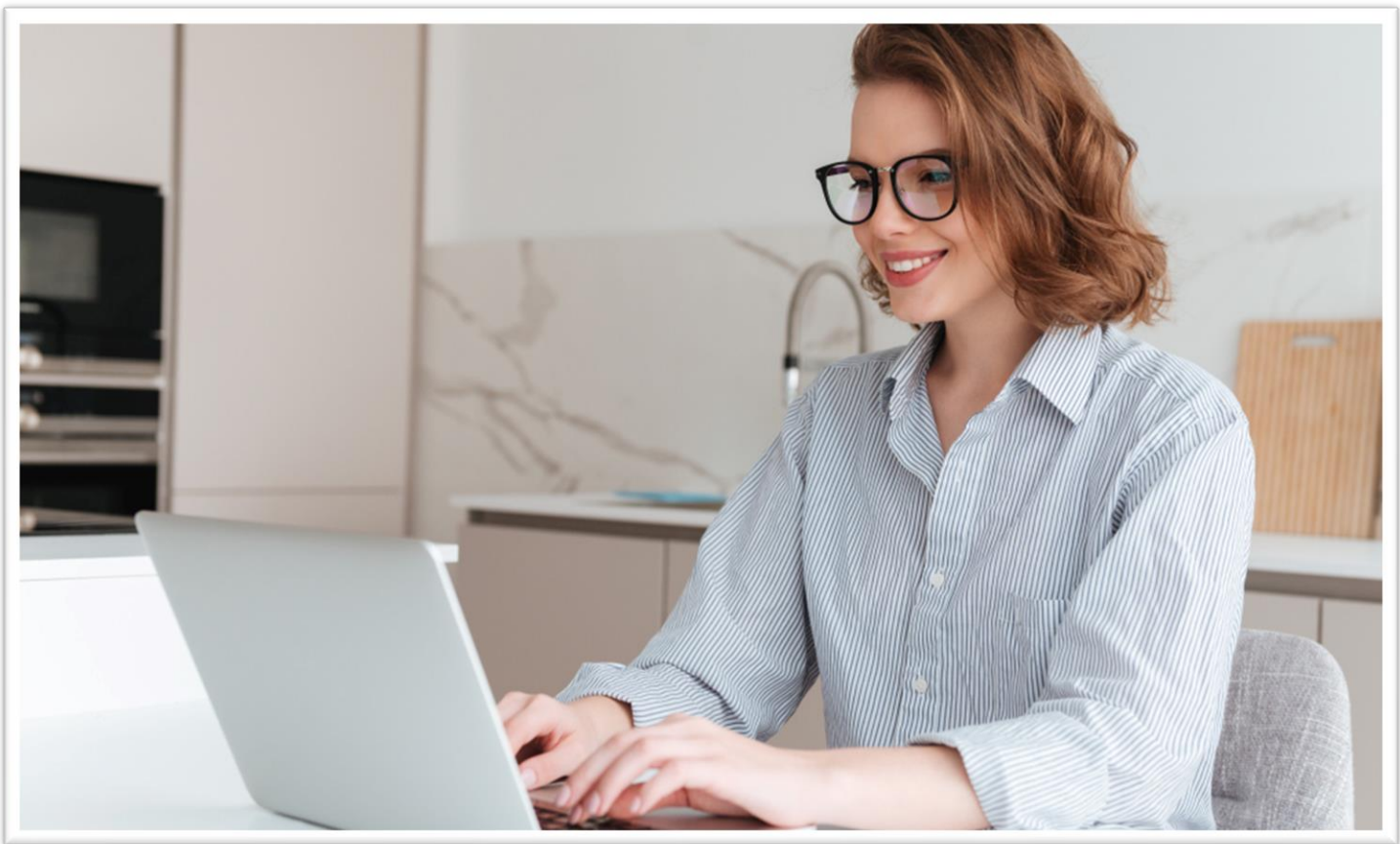
education incentives, the owner will receive a reservation form after the intake call. If a project has enrolled in the Program and received design assistance, once construction is nearing completion according to the recorded project timeline, the program team will send a resident education email to the property owner to remind them of the opportunity to pursue resident education incentives.

Upon submitting the reservation form, the program team will review potential resident education activities with the applicant and provide guidance and feedback to support program compliance. Upon completion of each defined resident education activity, the applicant can submit a reimbursement claim. The applicant should request a resident education claim form through the TA request. This will result in a partially prefilled form to minimize administrative time of the applicant. The applicant will submit the reimbursement claim and supporting documentation. The claim will be reviewed for program compliance, and upon approval, it will be submitted for reimbursement.

### **8. Receiving payment**

As part of the submission documents, the Program requires owners to provide W-9 and ACH forms for payment; The program team will review and verify all supporting documentation for each claim submission. The program team then submits the claim to SCE for their final review. Once SCE have approved incentive submission request, the program will issue payment via ACH. Program participants can submit claims up to twice in one month, as needed.





## Contact Us

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### Utility disclaimer:

The Clean Energy Homes program is funded by California utility ratepayers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. Program and services are available to SCE customers who meet specific household income guidelines or who participate in certain Public Assistance Programs. This Program may be modified or terminated without prior notice.