

## Appendix A

### Resolution E-5364

## **SOLAR ENERGY SYSTEM SUPPORTING INFORMATION**

This document was developed through coordination of the California Contractors State License Board and the California Public Utilities Commission pursuant to Business and Professions Code section 7169, subdivision (c).

## **1. IMPORTANT INFORMATION FOR CONSUMER**

**Except for a limited down payment, it is against the law for a contractor to collect payment for work not yet completed, or for materials not yet delivered.**

**This is true whether the payment comes from you or your financing company/lender.**

**If there is a down payment, it cannot exceed the lesser of \$1,000 or 10 percent of the contract price.**

**If you are asked to make payment(s) before the project is completed, please be aware it is against the law for a contractor to collect payment for work not yet completed, or for materials not yet delivered.**

**Be careful about payments for “plans” or “permits” before the work starts. Call or go to your local permitting office’s website to confirm permit costs before paying them.**

**If you are asked to make payments and are not provided with a payment schedule or believe the contractor requested or accepted payment that exceeds the value of the work performed or material delivered, file a complaint with CSLB.**

**Unscrupulous salespeople may offer false incentives, rebates, or other offers to pressure you into signing a solar contract. Do your own research to make sure incentives, rebates, or other offers by a contractor are legitimate.**

**You have three days to review or cancel any agreement before you commit to it, or five days if you are over 65 unless this sale was negotiated at a contractor’s place of business. Review the following pages carefully.**

## 2. INSTALLATION INFORMATION

**Will subcontractors be used to perform this work? ☐ Yes ☐ No**

*If yes, the Contractor will provide me the name, license information, and contact information for all subcontractors before installation begins.*

**Information about warranty coverage is in the contract on page: \_\_\_\_\_**

**Make sure the system is permitted and inspected. Systems not installed to code can cause problems. Solar systems also may need maintenance; mechanical, electrical, software, and internet problems can occur. Information about the service and maintenance of the system is in the contract on page: \_\_\_\_\_**

## 3. INFORMATION ABOUT THE AGREEMENT

### **PPAs/Leases:**

**Is this a power purchase agreement (PPA)/Lease? ☐ Yes ☐ No.**

**Customer will not own system. For PPAs, customer will pay for the power the system uses. For leases, customers will pay to use the system)**

Name of financing company: \_\_\_\_\_

Term of PPA/Lease: \_\_\_\_\_ years \_\_\_\_\_ months

**Can the customer transfer the system to a new homeowner if they want to sell their house? ☐ Yes ☐ No.** This may require the customer to pay off the agreement in full. See page(s) \_\_\_\_\_ of the contract for more information.

### **Financing:**

**Is this a purchase? (Customer will own system) ☐ Yes ☐ No.**

**Is the contractor facilitating a solar loan for the customer? ☐ Yes ☐ No.**

If PACE financing is used, the customer will receive a separate disclosure document.

Name of financing company: \_\_\_\_\_

Term of loan: \_\_\_\_\_ years \_\_\_\_\_ months

## Complete One:

### 1. CASH/LOAN:

Total cost for the solar energy system or purchase, including installation fees, document preparation fees, service fees or other fees before subtracting possible rebates or tax credits.

*NOTE: You may or may not be eligible for federal tax credits or state/federal incentives. See [www.cpuc.ca.gov/solarguide](http://www.cpuc.ca.gov/solarguide) or consult your tax or legal professional for further information.*

\$ \_\_\_\_\_

Monthly payment (loans only):

\$ \_\_\_\_\_

Interest rate (loans only):

\_\_\_\_\_ %

### 2. LEASE:

Total Cost:

\$ \_\_\_\_\_

Monthly payment:

\$ \_\_\_\_\_

Escalator\*:

\_\_\_\_\_ % per year

### 3. PPA:

Energy rate for power purchase agreement:

\_\_\_\_\_ \$/kWh

Escalator\*:

\_\_\_\_\_ % per year

Upfront payment, if applicable

\$ \_\_\_\_\_

Monthly payments, if applicable

\$ \_\_\_\_\_

Go to [www.cpuc.ca.gov/solarguide](http://www.cpuc.ca.gov/solarguide) for more information on each of these fees.

\* An escalator is a price increase over time. Ask your provider to explain how much your bills are expected to increase every year due to an escalator, and why they are including an escalator.

## 4. ENERGY SAVINGS

When designing your solar or solar + storage system, companies will give you an estimate of how much you will save on your electricity bill. This section shows this estimated bill savings. The estimate can be used as a guide, but is not a guarantee of future savings, which will depend on many factors. Go to [www.cpuc.ca.gov/solarguide](http://www.cpuc.ca.gov/solarguide) to learn more about protecting yourself from misleading claims and other useful things to know before you sign a contract.

### Inputs and Assumptions\*

My Annual Electricity Usage (*past 12 months*\*\*)

kWh

Estimated Annual Solar Electricity Generation (estimation of *what my system will generate*) \*\*\*

kWh

Battery Capacity

kWh

Battery Minimum State of Charge

%

**Before:** Electricity provider's rate schedule you are on now

*Before*

**After:** Electricity provider's eligible rate schedule after installation

*After*

*\*\*If 12 months of data not available, explain why and how usage was determined here:*

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**Your contractor must provide one of the two required estimates that follow, based on whether your planned system will have a battery or not.**

**1. Estimated Bill Savings for Systems with Solar and Battery Storage:**

***Required Estimate:*** Battery optimized for maximizing bill savings (battery is programmed to optimize bill savings by serving onsite load or exporting to the grid based on price signals)

<u>Required Calculation</u>	Total Estimated Savings in First Year \$
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***Optional Estimate:*** Battery programmed to prioritize self-consumption (battery prioritizes offsetting electricity use over discharging to the grid)

<u>Optional Calculation</u>	Total Estimated Savings in First Year \$
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***Optional Estimate:*** Battery programmed for home back-up (prioritize keeping battery charged in case of outages)

<u>Optional Calculation</u>	Total Estimated Savings in First Year \$
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Name of Calculator Used:

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## 2. Estimated Bill Savings for Systems with Solar Only (no battery):

<u>Required calculation***</u>	Total Estimated Savings in First Year \$
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*\*Explanation and criteria for the standardized inputs and assumptions are available here:*

<https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M344/K976/344976563.PDF>. Beginning in late 2025 and 2026, rates charged to all customers (meaning customers without rooftop solar and with rooftop solar) will include a base services charge to fairly recover costs from all customers for electric grid infrastructure and other shared costs. Please see [https://www.cpuc.ca.gov/-/media/cpuc-website/divisions/energy-division/documents/demand-response/demand-flexibility-oir/ab205\\_factsheet\\_050824.pdf](https://www.cpuc.ca.gov/-/media/cpuc-website/divisions/energy-division/documents/demand-response/demand-flexibility-oir/ab205_factsheet_050824.pdf) for more information. Calculations are to be made with an assumption of no rate escalation. Go to [www.cpuc.ca.gov/solarguide](http://www.cpuc.ca.gov/solarguide) for the current average annual escalation rate of electricity costs.

*\*\*\*Estimates of the solar-only portion of installations must use calculations based on PVWatts (available at <https://pvwatts.nrel.gov/>) to calculate annual solar electricity generation, pursuant to Resolution E-5364.*