DATE OF ISSUANCE: 02/21/12

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

ENERGY DIVISION **RESOLUTION E-4472**
February 16, 2012

R E S O L U T I O N

Resolution E-4472. Southern California Edison (SCE) Advice Letter (AL) 2655-E, Pacific Gas and Electric (PG&E) Advice Letter 3950-E, and California Center for Sustainable Energy (CCSE) Advice Letter 25, collectively the California Solar Initiative (CSI) Program Administrators, to streamline the CSI application process.

PROPOSED OUTCOME: This Resolution approves the CSI Program Administrators' (PA) request for the modification of applicant response times for incomplete applications to 14 calendar days, and associated proposals to streamline the application process, as originally proposed in the PAs' Advice Letters submitted November 2011. All other amendments to the CSI Program Handbook[1] proposed in the above Advice Letters are also approved.

ESTIMATED COST: $0

By SCE Advice Letter 2655-E, filed on November 18, 2011;
By PG&E Advice Letter 3950-E, filed on November 18, 2011;
By CCSE Advice Letter AL 25, filed on November 18, 2011.

SUMMARY

The CSI Program Administrators (PAs)[2] submitted Advice Letters (ALs) in November 2011 requesting modification of applicant response times from 20 to

[1] The CSI handbook is available here: http://www.cpuc.ca.gov/PUC/energy/Solar/handbook.htm.

[2] The CSI Program Administrators are Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), and the California Center for Sustainable Energy (CCSE) in San Diego Gas and Electric Company's territory.

14 calendar days for incomplete applications, as well as other programmatic modifications to the CSI Program Handbook (Handbook). The Advice Letters were not protested.

In December 2010, Resolution E-4396 had previously denied the PAs' request for amendments to the CSI Handbook related to a proposed 1-Step Application Process, including decreasing the application review and application fee submission time from 20 days to 14 days.

Upon review of the Advice Letters, Energy Division staff has concluded that these particular amendments are not integral to the 1-Step Application Process, and will help reduce the costs associated with administering and applying for incentives. Accordingly, the proposed Handbook amendments to change the current 20-day application response time for incomplete applications to 14 calendar days, and all other proposed modifications to the CSI Handbook, are approved by this Resolution.

BACKGROUND

I. Decisions Governing CSI Program Handbook Process

On January 17, 2006, the Commission issued Decision (D.) 06-01-024, establishing the California Solar Initiative. D.06-08-028, which, among other things, clarified the advice letter process for submitting subsequent revisions to the Handbook, allows the CSI PAs to periodically update the Handbook with revised or new policy changes for the CSI program by submitting proposed amendments via Advice Letter to the Commission for approval. The Commission can also change the Handbook on its own motion, via resolution. If the proposed amendments are not protested by parties, the amendments are approved by the Commission and the PAs implement the changes via the Handbook.

In accordance with the advice letter process, the CSI PAs submitted SCE AL 2655-E, PG&E AL 3950-E, and CCSE AL 25, on November 18, 2011, to modify the Handbook in order to streamline the application process and make other proposed changes.

The CSI PAs have collectively received over 23,725 applications in 2011.[3] Given the volume of applications, even a modest savings in administration processing cost is deemed worthwhile from administrative and ratepayer perspectives. An adoption of cost-saving strategies will reduce costs associated with administering and applying for incentives.

II. Summary of Commission Resolution E-4396

In December 2010, the CSI PAs submitted SCE AL 2533-E, PG&E AL 3768-E and CCSE AL 13, which requested a number of amendments to the CSI Handbook. Among them were proposals to establish a mandatory 1-Step application review process for small projects, and to change the applicant reponse time for incomplete applications and the application fee submission time to 14 calendar days.

In September 2011, Resolution E-4396 denied the CSI PAs' request for a 1-Step application review process and the process-related amendments to change the application time and application fee submission time to 14 calendar days. The request for a 1-Step Application Process was denied on the grounds that it would pose unnecessary risk to contractors and CSI participants by requiring small projects to install and interconnect prior to the issuance of a reserved incentive level.

Further, Resolution E-4396 directed the CSI PAs "to find and implement cost-effective strategies to reduce application paperwork, review current processes, and make reasonable modifications to the existing 2-step application process." (Resolution E-4396, Ordering Paragraph 3).

III. Summary of the Proposed Handbook Revisions in SCE AL 2655-E, PG&E AL 3950-E, and CCSE AL 25

As directed in Resolution E-4396, the proposed CSI Program Handbook revisions in SCE AL 2655-E, PG&E AL 3950-E, and CCSE AL 25 aim to streamline the application process and reduce processing times, as well as allow for greater flexibility when evaluating project extension requests, modify the onsite field inspection requirements for Single-Family Affordable Solar Homes (SASH)

[3] Source: http://www.californiasolarstatistics.ca.gov/reports/monthly_stats/. Data as of December 14, 2011.

Program projects following Commission D.11-07-031, and make other clarifying changes.

The following is a complete list of the proposed amendments:

- Update CSI PA contact information;
- Removal of signed field verification form;
- Modification of applicant response time for incomplete reservation requests from 20 to 14 calander days;
- Require the Proof of Project Milestone package to be submitted via the online application database, Powerclerk;
- Modification of the Extension Request submittal process to allow greater flexibility in determining if an extension will be granted;
- Modification of SASH onsite field inspections following Commision Decision 11-07-031; and,
- Clarification of criteria for complete incentive claim forms.

NOTICE/PROTESTS

Notices of SCE's AL 2655-E, PG&E's AL 3950-E, and CCSE's AL 25 were made by publication in the Commission's Daily Calendar. SCE, CCSE and PG&E stated that a copy of the Advice Letter was mailed and distributed in accordance with Section 3.14 of General Order 96-B.

PROTESTS

No protests were filed for SCE AL 2655-E, PG&E AL 3950-E, or CCSE AL 25.

DISCUSSION

The Commission has reviewed the Advice Letters and makes the following observations:

Resolution E-4396 denied the PAs' request for amendments that changed the application review and application fee submission times from 20 days to 14 days because Energy Division staff interpreted these modifications to be related to the 1-Step Application Process. The resolution denied the 1-Step Application Process, and therefore the application review and application fee submission period modifications - which were assumed to be part of the 1-Step Application Process - were also denied.

The Program Administrators have now re-filed amendments to change the current 20-day application response time for incomplete applications to 14 calendar days. Upon further review, Energy Division staff has concluded that these particular amendments are not integral to the 1-Step Process. In addition, these amendments, as well as the other proposed amendments in the advice letters, will further the Commission's directive in Ordering Paragraph 3 of Resolution E-4396 to streamline the application process.

Therefore, we approve the amendments that change the current 20-day application response period for incomplete applications to 14 calendar days and all the other amendments included in SCE AL 2655-E, PG&E AL 3950-E, and CCSE AL 25.

COMMENTS

This is an uncontested matter in which the resolution grants the relief requested. Accordingly, pursuant to PU Code 311 (g)(2) and rule 14.6(c)(2) of the Commission's Rules of Practice and Procedure, the otherwise applicable 30-day period for public review and comment is being waived.

FINDINGS AND CONCLUSIONS

1. D.06-08-028 directed the CSI PAs to file an Advice Letter to make changes to the CSI Handbook and clarified the advice letter process for submitting subsequent revisions to the CSI Program Handbook.
2. Resolution E-4396 denied the PAs' request for amendments to the CSI Handbook "related to the 1- Step Process," and directed the PAs to adopt tighter application processing timelines.
3. On November 18, 2011, SCE filed AL 2655-E, PG&E filed AL 3950-E, and CCSE filed AL 25, to make certain modifications to the CSI Handbook.
4. No protests were filed to the Advice Letters.
5. The proposed amendments that change the current 20-day application response time for incomplete applications to 14 calendar days are not integral to the 1-Step Application Process.
6. The proposed amendments in SCE AL 2655-E, PG&E AL 3950-E, and CCSE AL 25 follow the Commission's directive in Resolution E-4396 to find cost-effective strategies to streamline the CSI application process.

THEREFORE IT IS ORDERED THAT:

(1) The CSI Handbook amendments requested by California Solar Initiative Program Administrators, Southern California Edison in Advice Letter 2655-E, Pacific Gas & Electric's Advice Letter 3950-E, and the California Center for Sustainable Energy's Advice Letter 25, included herein as Appendix A, are approved.

This Resolution is effective today.

I certify that the foregoing resolution was duly introduced, passed and adopted at a conference of the Public Utilities Commission of the State of California held on February 16, 2012; the following Commissioners voting favorably thereon:

/s/ Paul Clanon
Paul Clanon
Executive Director

MICHAEL R. PEEVEY
PRESIDENT
TIMOTHY ALAN SIMON
MICHEL PETER FLORIO
CATHERINE J. K. SANDOVAL
MARK J. FERRON
Commissioners

Appendix A
SCE AL 2655-E, PG&E AL 3950-E, and CCSE AL 25
Proposed CSI Handbook Amendments

Below are the red-lined sections of the CSI Handbook that would be amended per SCE AL 2655-E, PG&E AL 3950-E, and CCSE AL 25:

1.9 CSI Program Administrator Contact Information and Other Useful Resources

Program Administrators	
Pacific Gas and Electric Company (PG&E) Telephone: Solar Customer Service Center: (877) 743-4112 ~~Solar Hotline: (415) 973-3480~~ Fax: (415) 973-2510 Mailing Address: PG&E Solar and Customer Generation (CSI) P.O. Box 7433 San Francisco, CA 94120-7433 Overnight Mail: 245 Market St Mail Code: N7R San Francisco, CA 94105-1797	www.pge.com/solar PG&E offers solar classes: www.pge.com/solarclasses Email: solar@pge.com
Southern California Edison (SCE) Telephone: (866) 584-7436 Fax: (626) 302-3967 Mailing Address: Attn: CSI Program Administrator SCE Customer Solar & Self-Generation Southern California Edison P.O. Box 800 Rosemead, CA 91770-0800	www.sce.com/CSI/ Email: csigroup@sce.com
California Center for Sustainable Energy (CCSE) – Telephone: (858) 244-1177 Fax: (858) 244-1178 Mailing Address: Attn: CSI Program 8690 Balboa Ave. Suite 100 San Diego, CA 92123-1502	www.energycenter.org CCSE solar events and classes www.energycenter.org/calendar Email: csi@energycenter.org
SASH Program Manager	

GRID Alternatives Telephone: (510) 652-4730 Toll free: (866) 921-4696 Fax: (510) 225-2585 Mailing Address: 1171 Ocean Ave. Suite 200 Oakland, CA 94608	www.gridalternatives.org Email: SASH@gridalternatives.org
Utility Interconnection & NEM Contacts	
Pacific Gas and Electric Company (PG&E) Telephone: ~~PG&E Generation Interconnection Hotline:~~ ~~(415) 972-5676~~ Solar Customer Service Center: (877) 743-4112	www.pge.com/gen Email: gen@pge.com
Southern California Edison (SCE) Telephone: (626) 302-9680 Mailing Address: CSI NEM Program Administrator SCE Customer Solar & Self-Generation Southern California Edison P.O. Box 800 Rosemead, California 91770-0800	Email: solarnem@sce.com

Table 11
Basic Application Process Steps & Flow

Responsible Party	Action	Residential & Small Non-Residential (<10 kW)	Gov't, Non-Profit & Public Entities (≥10 kW)	Non-Residential/ Commercial (≥10 kW)	MASH Track 1A/1B
Applicant	Complete & Submit Reservation Request Package	X	X	X	X
Applicant	Complete & Submit Grant Proposal Form with RRF Package				
Applicant	Pay Application Fee (Applicable for systems ≥ 10kW CEC-AC)		X	X	X
PA	Process & Evaluate Reservation Request Package. IF: • Incomplete: Request additional information from Applicant & suspend project • Ineligible: Send notification to Applicant via email • Complete & Eligible: Send Applicant Reservation Notice and any applicable forms	X	X	X	X
Applicant	Proceed with Project purchase & installation Project must meet incentive level requirements & be operational by Reservation Expiration Date	X	X	X	X
Applicant	Submit Proof of Project Milestone Package		X	X	X
PA	Process & Evaluate Proof of Project Milestone Package. IF: • Incomplete: Request additional information from Applicant & suspend project • Ineligible: Send notification to Applicant via email • Complete & Eligible: Send Applicant Confirmed Reservation Notice and any applicable forms		X	X	X
Applicant	Complete & Submit Incentive Claim Form Package When Project is operational	X	X	X	X
PA	Process & Evaluate Incentive Claim Form Package. IF: • Incomplete: Request additional information from Applicant & suspend project • Ineligible: Send notification to Applicant via email • Complete & Eligible: Send Incentive Payment(s) to designated payee May conduct Field Verification/Inspection	X	X	X	X

4.2 1-Step Application Process

This option only applies to Host Customers who have completed their interconnection to the utility grid within the past 12 months. However, Applicants of any customer class and project size (i.e., small (< 10 kW) non-residential and all residential, government, non-profit and public entities) may choose to use the 1-Step process, if they meet the interconnection requirement.

A Host Customer that is interconnected to the utility grid prior to applying for a CSI Incentive will be able to submit only the Incentive Claim Form (ICF) without submitting the Reservation Request Form. The following documents must be submitted together:

1. Completed Incentive Claim Form and Program Contract with Signature[31]
2. Electrical System Sizing Documentation (new/expanded load only) for projects > 5 kW
3. Certification of tax-exempt status (gov't and non-profit only)
4. Documentation of an Energy Efficiency Audit if you have not met Title 24 or other exemptions. Title 24 documentation is mandatory for non-residential new construction.
5. Copy of signed Energy Efficiency Disclosure Form
6. Copy of signed Commitment Agreement (EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75) (Proof of Benchmarking Documentation required)
7. Proof of at least 15% above current Title 24 standards (for non-residential new construction only)
8. Copy of New Construction Building Permit (for non-residential new construction only)
9. Building Site Plan (for non-residential new construction only)
10. Copy of Executed Agreement of Solar Energy System Purchase and Installation
11. Copy of Executed Alternative System Ownership Agreement (If System Owner is Different from Host Customer)

~~12. Signed Field Verification Certification Form~~

~~13.~~12. CSI eligible Performance Monitoring and Reporting Service (PMRS) provider to be listed on the Incentive Claim Form for all projects. PMRS is mandatory for projects > 10 kW (5 year contract to be submitted only upon PA request)

~~14.~~13. (PBI Only) Copy of Executed PDP Contract

~~15.~~14. Copy of Retro-commissioning Report (EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75)

~~16.~~15. Host Customer Email Address

~~17.~~16. Authorization to: Receive Customer Information or Act on a Customer's Behalf (CCSE/SDG&E territory only)

~~18.~~17. Copy of the SOF chart marking the correct data point (other solar generating technologies only)

---

[31] Signatures for all submitted documentation are acceptable in the following formats:

- Original signed documents, or "wet" signatures
- Scanned copies of original signed documents
- Faxed copies of original signed documents

Although "wet" signatures are not required on submitted documents, original signed documentation must be maintained by the Applicant, Host Customer and/or System Owner for at least five years from the date of submission. Program Administrators reserve the right to request original signed documents within the five-year period.

Customers who choose this option and have not been interconnected prior to applying for a CSI Incentive may have their applications returned and/or cancelled.

Table 12
1-Step Application Process – Form and Documentation Requirements

Step 1	More Information
Completed Reservation Request/Incentive Claim Form and Program Contract with Signature	Section 4.11.1.1
Electrical System Sizing Documentation (new/expanded load for systems greater than 5 kW)	Section 4.11.1.3
Certification of tax-exempt status (gov't and non-profit only)	Section 4.11.1.14
Documentation of an Energy Efficiency Audit if you have not met Title 24 or other exemptions. Title 24 documentation is mandatory for non-residential new construction.	Section 4.11.1.4
Copy of signed Energy Efficiency Disclosure Form	Section 4.11.1.5
Copy of signed Commitment Agreement (EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75) (Proof of Benchmarking Documentation req'd)	Section 4.10.1.6
Proof of at least 15% above Title 24 Standards (non-residential new construction)	Section 4.11.1.8
Copy of Executed Agreement of Solar System Purchase and Installation	Section 4.11.1.11
Copy of Executed Alternative System Ownership Agreement (If System Owner is Different from Host Customer)	Section 4.11.1.12
~~Signed Field Verification Certification Form~~	~~Section 4.11.3.5~~
Copy of Executed PDP Contract (PBI Only)	Section 4.11.3.3
Copy of Retro-commissioning Report (EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75)	Section 4.11.3.7
Copy of Executed PDP Contract (PBI Only)	Section 4.11.3.3

4.3 2-Step Application Process for GM CSI Small (< 10 kW) Non-Residential and All Residential Projects

All residential and small (<10kW) non-residential Projects are required to receive a lump sum EPBB incentive payment. Only single and dual axis tracking systems in this size category are eligible to receive PBI payments based on $/kWh produced. For more on the CSI Incentive structure, see Section 3 above.

There are two primary steps for residential and small non-residential Applicants as follows:

1. Complete and submit a Reservation Request Package
2. Complete and submit the Incentive Claim Form Package

Detailed instructions are included with the Reservation Request Package. To apply for your incentive online visit csi.powerclerk.com or your Program Administrator's website to download forms.

4.3.1.1 Incomplete Reservation Requests

If an application is found incomplete or requires clarification, the Program Administrator will request additional information. Applicants have 14~~20~~ calendar days to respond to the request with the necessary information. If after 14~~20~~ calendar days the Applicant has not submitted the requested information, the application will be cancelled. However, this does not preclude you from resubmitting your project to the Program Administrator for an incentive. All resubmitted application packages will be treated as new applications (i.e., all required documents must be resubmitted) and processed in sequence along with other new applications.

Incentive funds are not reserved until the Program Administrator receives all information and documentation required for the Reservation Request and the project is approved.

4.3.1.2 Approval of Reservation Request

Once received, the Program Administrator will review the application package for completeness and determine eligibility. Applications will also be screened to ensure that the project has not applied for incentives through other Program Administrators or other state- or government-sponsored incentive programs.

Once the Program Administrator approves the reservation request, the Program Administrator will issue a Confirmed Reservation Notice, confirming that a specific incentive amount is reserved for the project.

The system must be purchased, installed, and put into operation by the Reservation Expiration Date (see Table 10 for length of reservation) as listed in the Confirmed Reservation Notice. The Confirmed Reservation Notice will list the specific reservation dollar amount and the Reservation Expiration Date.

4.3.1.3 CSI Reservation Queuing

Once an application is submitted, the Program Administrators will review the application for completeness. If the application is not complete, the Program Administrator will notify the Applicant and the Applicant will have 14 calendar days to provide the necessary information. During the 14 calendar day period, the reservation request will maintain the same place in the reservation queue. Once the applicant submits documents that correct the deficiency, then the reservation request will be confirmed at the then-current incentive step level that was conditionally reserved and the Program Administrator will notify the Applicant via a reservation confirmation letter. If applicant fails to correct the deficiency during the 14 calendar day period, the Program Administrator will cancel the application and cancel the spot in the reservation queue. The Program Administrator will notify the applicant via a cancellation notice.

~~4.3.1.3~~4.3.1.4 Reservation Period

CSI Incentives can be reserved for up to 12 months for residential retrofit projects. CSI Incentives can be reserved for up to 18 months for commercial, government, non-profit and public entity retrofit and new construction projects.

4.3.2 Step # 2: Submit Incentive Claim Form Package

After the solar energy system is purchased, installed, and put into operation, the Applicant should submit the Incentive Claim Form and the required supporting documentation.

The Incentive Claim Form Package must have signatures of Applicant, Host Customer and System Owner (if different from Host Customer), and should be submitted with the following documentation:

1. Incentive Claim Form with Signatures
2. CSI eligible Performance Monitoring and Reporting Service (PMRS) provider must be listed on the Incentive Claim Form for all projects. PMRS is mandatory for projects > 10 kW (5 year contract to be submitted only upon PA request)
3. Copy of Executed PDP Contract (PBI Only)

~~4. Signed Field Verification Certification Form (for Reservation Request Applications first received on or after 7/1/09)~~

~~5.~~4. Copy of Retro-commissioning Report (EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75)

~~6.~~5. Copy of the SOF chart marking the correct data point (other solar generating technologies only)

The online tool can be used to assist at the Incentive Claim Form stage even if it had not been used for the original Reservation Request Package.

Although the Applicant is no longer required to submit Proof of Authorization to Interconnect, the Program Administrators will verify interconnection prior to any incentive payment.

For more detailed information on submitting the Incentive Claim Form package, refer to Section 4.11.3.

Table 13
2-Step Application Process – Form and Documentation Requirements

Step 1: Reservation Request Package	More Information
Completed Reservation Request Package and Program Contract with Signature	Section 4.11.1.1
Electrical System Sizing Documentation (new/expanded load for systems greater than 5 kW)	Section 4.11.1.3
Certification of tax-exempt status (gov't and non-profit only)	Section 4.11.1.14
Documentation of an Energy Efficiency Audit if you have not met Title 24 or other exemptions. Title 24 documentation is mandatory for non-residential new construction.	Section 4.11.1.4
Copy of signed Energy Efficiency Disclosure Form	Section 4.11.1.5
Copy of signed Commitment Agreement (EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75) (Proof of Benchmarking Documentation req'd)	Section 4.11.1.6
Proof of at least 15% above Title 24 Standards (non-residential new construction only)	Section 4.11.1.8
Copy of New Construction Building Permit (non-residential new construction only)	Section 4.11.1.9
Building Site Plan (non-residential new construction only)	Section 4.11.1.10
Copy of Executed Agreement of Solar System Purchase and Installation	Section 4.11.1.11
Copy of Executed Alternative System Ownership Agreement (If System Owner is Different from Host Customer)	Section 4.11.1.12
Documentation of CPUC Code 2852 eligibility (MASH only)	Section 4.11.1.7
Step 2: Incentive Claim Form Package	
Complete Incentive Claim Form with Signatures	Section 4.11.3.1
Copy of Executed PDP Contract (PBI Only)	Section 4.11.3.3
~~Signed Field Verification Certification Form~~	~~Section 4.11.3.5~~
Copy of Retro-commissioning Report (EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75)	Section 4.11.3.6

4.4 3-Step Application Process for Large Non-Residential Projects (≥10 kW)

This section describes the 3-Step application process for all non-residential Projects ≥10 kW for commercial and industrial, government, non-profit, and public entities. However, the Applicant may expedite the 3-Step process by providing the required information to the Program Administrators in two steps. Non-residential projects (≥10 kW) are still subject to the eligibility requirements based on their system size and type, including the submission of any required application fees. See Section 4.3 for required timelines and paperwork.

The three primary steps for non-residential Applicants with systems larger than or equal to 10 kW are:

1. Complete and submit the Reservation Request Package and Application Fee.
2. Complete and submit the Proof of Project Milestone Package.

4.4.1.1.3 Forfeit of Application Fee

Once the initial Reservation Notice is issued and the project is cancelled or withdrawn by the Applicant and/or Host Customer, the application fee will be forfeited.

Once the initial Reservation Notice is issued and the Program Administrator rejects the project for failing to meet adequate proof of project milestone or reservation expiration date requirements, the application fee will be forfeited.

If a project reservation is allowed to lapse and the project is later built under a new reservation, the application fee for the previous reservation will be forfeited.

If the initial Reservation Notice is issued and the incentive level has been reduced (due to Commission directive, moving to the next step, etc.), the Applicant and Host Customer will be notified and given 14~~20~~ calendar days to submit in writing a request to withdraw their Reservation Request without losing their application fee. Upon receipt of a request to withdraw, the application fee shall be returned to the Host Customer. If the Applicant fails to withdraw the reservation request within 14~~20~~ calendar days, the application will be processed at the new, lower incentive level. If the application is not withdrawn within the 14~~20~~-day period, the Applicant will forfeit the application fee if it subsequently withdraws or fails to pursue its project.

An application fee may be returnable if a project is cancelled or withdrawn due to circumstances beyond the Host Customer's control. The PA will grant a return of the Application fee on a case-by-case basis.

All forfeited application fees will be re-allocated to the Program Administrator's CSI budget.

4.4.1.1.4 Effect of Change of System Change on Application Fee

Application fees will be retained until the completion of the proposed CSI project and will not be adjusted downward due to changes in Project system size or CSI Incentive amount.

4.4.1.2 Review of Reservation Request

Once received, the Program Administrator will review the application package for completeness and determine eligibility. Applications will also be screened to ensure that the Project has not applied for incentives through other CSI Program Administrators or other state- or government-sponsored incentive programs.

4.4.1.2.1 Incomplete Reservation Requests

Incentive funds are not reserved until the Program Administrator receives all information and documentation required for the Reservation Request Package, the application fee and the project is approved.

If an application is found to require clarification or is missing required documentation, the Program Administrator will request the information necessary to process that application further. Applicants have 14~~20~~ calendar days to respond to the requested clarification with the necessary information. If after 14~~20~~ calendar days, the Applicant has not submitted the requested information the applications will be cancelled. However, this does not preclude you from resubmitting your project to the Program Administrator for an incentive. All resubmitted application packages will be treated as new applications (i.e., all required documents must be resubmitted) and processed in sequence along with other new applications.

4.4.1.2.2 Approval of Reservation Request – Reservation Notice

Once a Reservation Request Package is determined to be complete and eligible, the Program Administrator will reserve funds allocated for a specified system size and will send an initial Reservation Notice to the Applicant.

The initial Reservation Notice documents that an incentive amount has been reserved for a project. The initial Reservation Notice will list, at a minimum, the approved incentive amount and the date by which the Proof of Project Milestone package must be submitted to secure the reservation, and all required documentation that must be submitted with it. Refer to Sections 4.4.2 and 4.10.2 for more information on the Proof of Project Milestone requirements.

4.4.1.2.3 Reservation Period for Commercial Projects

The initial Reservation is valid only until the Proof of Project Milestone Date, which will be 60 calendar days after the issuance date of the initial Reservation Notice. Within the noted 60 calendar days of the date of the initial Reservation Notice, the Applicant must submit to their Program Administrator the Proof of Project Milestone package. Once the Applicant has sufficiently demonstrated that the project is advancing, the Program Administrator will issue a Confirmed Reservation Notice. The Applicant will have 18 months to complete the project from the date that the initial Reservation Notice is issued.

4.4.1.2.4 Reservation Period for Government, Non-Profit and Public Entity Projects

The initial Reservation is valid only until the Proof of Project Milestone date, which will be 240 calendar days after the issuance of the initial Reservation Notice. Within the noted 240 calendar days of the date of the initial Reservation Notice, the Applicant the Applicant must submit to their Program Administrator the Proof of Project Milestone package. Once the Applicant has sufficiently demonstrated that the Project is advancing, the Program Administrator will issue a Confirmed Reservation Notice. The Applicant will have 18 months to complete the project from the date that the initial Reservation Notice is issued.

4.4.2 Step # 2: Submit Proof of Project Milestone Package

Within 60 calendar days (240 days for governmental, non-profit and public entities) of the date on the initial Reservation Notice, the Proof of Project Milestone package with all supporting documentation must be submitted to demonstrate to the Program Administrator that the Project is progressing and that there is a sustained commitment to complete the Project within the allowed timeline. The specific requirements by sector are as follows:

Once the Applicant has successfully met Proof of Project Milestone requirements, the Program Administrator will issue a Confirmed Reservation with a Reservation Expiration Date of 18 months from the date of the initial Reservation notice for commercial, governmental, non-profit, and public entity retrofit and new construction projects.

Powerclerk- ~~Electronic submittal of documentation is mandatory starting December 1, 2010.~~ t~~T~~he online application ~~tool~~ database must be used to submit Proof of Project Milestone package.

4.4.2.1 Required Proof of Project Milestone Documentation

The following documentation must be submitted on or before the Proof of Project Milestone date indicated in the initial Reservation Notice.

1. Completed Proof of Project Milestone Checklist
2. Copy of executed contract for System Purchase and Installation
3. Copy of Executed Alternative System Ownership Agreement (if System Owner is different than Host Customer)
4. Copy of RFP or solicitation (Government, Non-Profit, and Public Entities only)
5. Revised copy of the SOF chart marking the correct data point if applicable (other solar generating technologies only)

For more information on the above-referenced documentation, see Section 4.11.2.

Once Applicants have successfully met the Proof of Project Milestones requirements, the Program Administrator will issue a Confirmed Reservation Notice.

4.4.2.1.1 Incomplete Proof of Project Milestone

If submitted Proof of Project Milestone documentation is received by the Proof of Project Milestone Date but requires clarification or is missing required documentation, the Program Administrator will request the information necessary to process that application further. Applicants have 14~~20~~ calendar days to respond with the necessary information. If, after 14~~20~~ calendar days, the Applicant has not submitted the requested information, the application will be cancelled.

4.4.2.1.2 Proof of Project Milestone Extensions

In general, no extensions to the Proof of Project Milestone date are permitted.

4.4.3 Step # 3: Submit Incentive Claim Form Package

Upon Project completion and prior to the Reservation Expiration Date, Applicants must submit a completed Incentive Claim Form along with all of the necessary documentation to request an incentive payment. The Incentive Claim Form Package must have signatures of Applicant and Host Customer and should be submitted with the following documentation:

1. Incentive Claim Form with Signatures

2. CSI eligible Performance Monitoring and Reporting Service (PMRS) provider must be listed on the Incentive Claim Form for all projects (5 year contract to be submitted only upon PA request)
3. (PBI Only) Copy of Executed PDP Contract
4. ~~Signed Field Verification Certification Form (for Reservation Request Applications first received on or after 7/1/09)~~

~~5.~~4. Copy of Retro-commissioning Report (EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75)

~~6.~~5. Copy of the SOF chart marking the correct data point (other solar generating technologies only)

Electronic submittal of documentation is mandatory by December 1, 2010. The online tool must be used to submit the Incentive Claim Form Package.

Refer to Section 4.11.3 for more information about the requirements associated with submitting the Incentive Claim Form package.

Table 14
3-Step Application Process – Form and Documentation Requirements

Step 1: Reservation Request Package	More Information
Completed Reservation Request Package and Program Contract with Signature	Section 4.11.1.1
Electrical System Sizing Documentation (new/expanded load only)	Section 4.11.1.3
Application Fee	Section 4.4.1.1
Certification of tax-exempt status (gov't and non- profit only)	Section 4.11.1.14
Documentation of an Energy Efficiency Audit (if you have not met Title 24 or other exemptions) (Title 24 documentation mandatory for non-residential new construction)	Section 4.11.1.4
Copy of signed Energy Efficiency Disclosure Form	Section 4.11.1.5
Copy of signed Commitment Agreement (EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75) (Proof of Benchmarking Documentation req'd)	Section 4.11.1.6
Copy of New Construction Building Permit (for non-residential new construction only)	Section 4.11.1.19
Building Site Plan (for non-residential new construction only)	Section 4.11.1.10
Step 2: Proof of Project Milestone Package	
Completed Proof of Project Milestone Checklist	Section 4.11.2.1
Copy of executed contract for system purchase and installation	Section 4.11.2.2
Copy of executed alternative System Ownership agreement (if System Owner is different than Host Customer)	Section 4.11.2.3
Copy of RFP or solicitation (gov't, non-profit, and public entities only)	Section 11.3.5
Step 3: Incentive Claim Form Package	
Complete Incentive Claim Form with Signatures	Section 4.11.3.1
Copy of Executed PDP Contract (PBI Only)	Section 4.11.3.4
~~Signed Field Verification Certification Form (for Reservation Request Applications first received on or after 7/1/09)~~	~~Section 4.11.3.5~~
Copy of Retro-commissioning Report (EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75)	Section 4.11.3.6

For more information on the above-referenced forms, go to Section 4.11.2

4.5.1.2.2 Incomplete Proof of Project Milestone

If submitted Proof of Project Milestone documentation is received by the Proof of Project Milestone Date but requires clarification, the Program Administrator will request the information necessary to process that application further. Applicants have 20 calendar days to respond with the necessary information. If, after 20 calendar days, the Applicant has not submitted the requested information, the applications will be cancelled.

4.5.1.2.3 Proof of Project Milestone Extensions

In general, no extensions to the Proof of Project Milestone date are permitted.

4.5.1.3 Step # 3: Submit Incentive Claim Form Package

Once Applicants have successfully met the Proof of Project Milestones requirements, the Program Administrator will issue a Confirmed Reservation Notice, which will list the specific reserved Incentive amount and the Reservation Expiration Date. Upon Project completion and prior to the Reservation Expiration Date, Applicants must submit a completed Incentive Claim Form along with all of the necessary documentation to request an incentive payment. The Applicant should submit the Incentive Claim Form and the required supporting documentation after the solar energy system is purchased, installed, and put into operation.

The Incentive Claim Form Package must have signatures of Applicant and Host Customer and should be submitted with the following documentation:

1. Incentive Claim Form with Signatures
2. PMRS Cost Cap Exemption Documentation (if no eligible PMRS is installed)
3. Revised EPBB Calculation Printout (If applicable)
4. Documentation of Tenant/Common Load allocation
5. ~~Signed Field Verification Certification Form~~

Although the Applicant is not required to submit Proof of Authorization to Interconnect, the Program Administrators will verify interconnection prior to any incentive payment. Refer to Section 4.11.3 for more information about the requirements associated with submitting the Incentive Claim Form package.

Table 15
MASH Track 1A/1B 3-Step Application Process
Form and Documentation Requirements

Step 1: Reservation Request Package	More Information
Completed Reservation Request Package, Program Contract with Signature,	Section 4.11.1.1
Application Fee	Section 4.11.1.13
Electrical System Sizing Documentation	Section 4.11.1.3
Documentation of CPUC Code 2852 eligibility	Section 4.11.1.8
Documentation of an Energy Efficiency Audit (or Title 24 documentation, LIEE documentation or other exemptions)	Section 4.11.1.4
Copy of signed Energy Efficiency Disclosure Form	Section 4.11.1.5
Printout of EPBB Tool Calculation	Section 4.11.1.7
Step 2: Proof of Project Milestone Package	
Completed Proof of Project Milestone Checklist	Section 4.11.2.1
Copy of executed contract for system purchase and installation	Section 4.11.2.2
Copy of executed alternative System Ownership agreement (if System Owner is different than Host Customer)	Section 4.11.2.3
Revised EPBB Calculation Printout (if applicable)	Section 4.11.2.4
Copy of RFP or solicitation (if applicable)	Section 4.11.2.5
Step 3: Incentive Claim Form Package	
Complete Incentive Claim Form with Signatures	Section 4.11.3.1
Revised EPBB Calculation Printout (if applicable)	Section 4.11.3.2
Documentation of Tenant/Common Load allocation	Section 4.11.3.5
PMRS Cost Cap Exemption Documentation (if no eligible PMRS is installed)	Section 4.11.3.3
~~Signed Field Verification Certification Form (for Reservation Request Applications first received on or after 7/1/09)~~	~~Section 4.11.3.6~~

Note that once the Track 1 incentive budget becomes fully subscribed within each Program Administrator territory, the incentive amount per application will be capped at the reserved amount in Step 1 (Reservation Request step). System modifications resulting in an increase in the incentive amount during the PPM or ICF step will not be paid.

Conversely, if the system modification results in a decrease in the incentive amount during the ICF step, the lower of the PPM confirmed reservation amount and the revised incentive will be paid.

The following documentation must be submitted on or before the Proof of Project Milestone date indicated in the initial Reservation Notice.

1. Completed Proof of Project Milestone Checklist
2. Copy of executed contract for System Purchase and Installation
3. Copy of Executed Alternative System Ownership Agreement (if System Owner is different than Host Customer)
4. Revised EPBB Calculation Printout (if applicable)
5. Copy of RFP or Solicitation (if applicable)

For more information on the above-referenced forms, see Section 4.11.

4.5.2.2.2 Incomplete Proof of Project Milestone

If submitted Proof of Project Milestone documentation is received by the Proof of Project Milestone Date but requires clarification, the Program Administrator will request the information necessary to process that application further. Applicants have 20 calendar days to respond with the necessary information. If, after 20 calendar days, the Applicant has not submitted the requested information, the applications will be cancelled.

4.5.2.2.3 Proof of Project Milestone Extensions

No extensions to the Proof of Project Milestone date are permitted.

4.5.2.3 Step # 3: Submit Incentive Claim Form Package

Once Applicants have successfully met the Proof of Project Milestones requirements, the Program Administrator will issue a Confirmed Reservation Notice, which will list the specific reserved Incentive amount and the Reservation Expiration Date. Upon Project completion and prior to the Reservation Expiration Date, Applicants must submit a completed Incentive Claim Form along with all of the necessary documentation to request an incentive payment. The Applicant should submit the Incentive Claim Form and the required supporting documentation after the solar energy system is purchased, installed, and put into operation.

The Incentive Claim Form Package must have signatures of Applicant and Host Customer and should be submitted with the following documentation:

1. Incentive Claim Form with Signatures
2. PMRS Cost Cap Exemption Documentation (if no eligible PMRS is installed)
3. Revised EPBB Calculation Printout (If applicable)
4. Supporting Documentation to Demonstrate Direct Tenant Benefit
5. ~~Signed Field Verification Certification Form (for Reservation Request Applications first received on or after 7/1/09)~~

Although the Applicant is not required to submit Proof of Authorization to Interconnect, the Program Administrators will verify interconnection prior to any incentive payment. Refer to Section 4.11.3 for more information about the requirements associated with submitting the Incentive Claim Form package.

4.5.2.3.1 PMRS Requirements

PMRS is required for all projects; however, exemptions are allowed for CSI Low Income Programs provided the cost of the PMRS exceeds the Program cost limits.

For MASH systems up to 30kW, the total cost of the metering, communication and PMRS for the first five years following final project approval shall be less than 1% of total PV system eligible project costs (exclusive of metering, communication and PMRS costs).

For MASH systems 30kW and above, the total cost of the metering, communication and PMRS for the first five years following final project approval shall be less than 0.5% of total PV system eligible project costs (exclusive of metering, communication and PMRS costs).

MASH projects eligible for the PMRS cost cap exemption must demonstrate a valid cost proposal (dated within the last six months) that the cost for a minimum level of PMRS service exceeds the cap. Projects are not eligible for the cost cap exemption if the cost proposal is for more than the minimum level of PMRS service.

The Cost Cap Exemption Documentation consists of any of the following items that demonstrate PMRS costs exceed the cost cap:

1. A quote from an eligible PMRS provider indicating the PMRS provider's cost for providing the basic PMRS described in this section; or
2. A quote detailing the equipment, installation, maintenance, and five-year service costs of any communications equipment and service required for the provision of the PMRS (if such equipment and service does not already exist at the Host Customer premise); or
3. An invoice or quote detailing the associated metering system costs (if separate from inverter and only if necessary for the provision of the PMRS); or
4. A letter on the Solar Contractor letterhead showing any additional costs, including labor, materials, overhead and Solar Contractor mark-up, to install and maintain the PMRS.

Table 16
MASH Track 2 3-Step Application Process
Form and Documentation Requirements

Step 1: Reservation Request Package, with Proposal	**More Information**
Completed Track 2 proposal	Section 4.11.1.16
Completed Reservation Request Package and Program Contract with Signature	Section 4.11.1.1
Electrical System Sizing Documentation	Section 4.11.1.3
Documentation of CPUC Code 2852 eligibility	Section 4.11.1.8
Documentation of an Energy Efficiency Audit (or Title 24 documentation, LIEE documentation or other exemptions)	Section 4.11.1.4
Copy of signed Energy Efficiency Disclosure Form	Section 4.11.1.5
Printout of EPBB Tool Calculation	Section 4.11.1.7
Step 2: Proof of Project Milestone Package	
Completed Proof of Project Milestone Checklist	Section 4.11.2.1
Copy of executed contract for system purchase and installation	Section 4.11.2.2
Copy of executed alternative System Ownership agreement (if System Owner is different than Host Customer)	Section 4.11.2.3
Revised EPBB Calculation Printout (if applicable)	Section 4.11.2.4
Copy of RFP or solicitation (if applicable)	Section 4.11.2.5
Step 3: Incentive Claim Form Package	
Complete Incentive Claim Form with Signatures	Section 4.11.3.1
Revised EPBB Calculation Printout (if applicable)	Section 4.11.3.2
Documentation of Tenant/Common Load allocation	Section 4.11.3.5
Confirmation of Direct Tenant Benefit	
PMRS Cost Cap Exemption Documentation (if no eligible PMRS is installed)	Section 4.11.3.3
~~Signed Field Verification Certification Form~~	~~Section 4.11.3.6~~

4.6 Changes to Reservations

4.6.1 Withdrawal

The Host Customer and System Owner agree that either of them may withdraw from the Project for any reason by providing written notice of such withdrawal to Program Administrator. In the event the Host Customer or System Owner so withdraws, the CSI Contract will be cancelled. The Host Customer will retain sole rights to the Reservation and can preserve the Reservation and corresponding Reservation number by submitting a new Reservation Request Package at the same time written notification of withdrawal from the Project is provided to Program Administrator. The Host Customer understands that an increase in the system size will receive funding at the current incentive level at the time of the submittal if the entire available budget for a Program Administrator is reserved for other projects and there is no available funding, the Program Administrator cannot increase the reserved incentive amount. The Host Customer also understands that submitting a new Reservation Request Package will not move or alter the Proof of Project Advancement Milestone Date provided by Program Administrator, if any. The Host Customer further understands that if the Host Customer fails to re-submit a Reservation Request Package at the time of Project withdrawal, the Application will be terminated in its entirety by the Program Administrator and any previously reserved incentive funding will be released. In that instance, the Host Customer must apply for a new incentive reservation should the Host Customer still wish to participate in the Program.

4.6.2 Extending the Reservation Expiration Date

A request to extend the Reservation Expiration Date is limited to a maximum of 180 calendar days of additional time. Any request must include a written explanation of why the extension is required and how much additional time is needed. Approval of a request for a change in Reservation Expiration Date will not change or modify any other reservation condition. Failure to submit the Incentive Claim Form package by the original or extended Reservation Expiration Date will result in a cancellation of the application. The Applicant should submit a time extension request in writing to the Program Administrators. In describing the reason for the time extension request, the Applicant should provide information on the following to aid the Program Administrators in their decision on granting an extension:

1. Circumstances were beyond the control of the reservation holder that prevented the system from being installed as described in the Reservation Request Package. Describe the need and reasons for the request.
2. If there was a problem in the permitting process and it was the cause of delay, provide documentation, such as any correspondence with the building department, to support this explanation.
3. Cost documentation must demonstrate that the system purchaser has incurred substantial costs toward ~~at least 50 percent of~~ the reserved system's total purchase price. ~~However, in cases where this amount exceeds the purchaser's contribution then the purchaser may still retain 10 percent of the total system cost and meet this cost documentation requirement.~~ Attach copies of paid invoices, checks or other verifying documentation with the extension request.
4. Documentation of any equipment installed at the Site.

In order for any Project to receive a Reservation Extension, the Applicant may need to show documentation of a purchase order or commitment from a PV panel manufacturer to supply the necessary equipment.

The Program Administrator reserves the right to perform a Site inspection to verify the status of the Project installation prior to granting the request for extension. If required, the Program Administrator shall notify the Applicant and schedule the Site visit within 10 days of notification.

Among the components of the CSI Project Review are:

- Onsite field inspections, including verification of CSI application information and/or metering inspections (if applicable)
- Application process review, including:
    - Review of all project application documentation
    - Review of interconnection information
    - Review of any other information about the Applicant's project that has been received by the Program Administrators
    - Review of PBI payment documentation (if applicable)

The results of the CSI Project Review process may affect project incentive payments and eligibility for future program participation.

First, the CSI Project Review process will determine whether a specific project should be paid incentives under the CSI program. The incentive payment will be contingent on and may be adjusted based on any aspect of the CSI Project Review, including applicable onsite field inspections. If an issue arises during the CSI Project Review, the Applicant, Solar Contractor, System Owner, Seller, and/or Host Customer may have the opportunity to correct the problem. However, if an issue arises during the onsite field inspection, the project is subject to the results of the inspection.

Second, the CSI Project Review process may also determine whether an Applicant, Solar Contractor, System Owner, Seller, and/or Host Customer are subject to the consequences for failures and/or immediate disqualification from participating in the CSI Program as provided in Sections 4.10.1 and 4.10.2.

The Program Administrator will notify the Applicant, Solar Contractor, System Owner, Seller, and/or Host Customer if the CSI Project Review will result in a change in system size and/or incentive amount due to failure or immediate disqualification as provided in Section 4.10.3.

4.9.1 Onsite Field Inspections

A portion of all CSI general market projects (EPBB and PBI) and SASH projects are subject to onsite field inspections or may be inspected at the Program Administrator's discretion. All ~~SASH and~~ MASH systems will receive an onsite field inspection. The Program Administrators will perform onsite field inspection for the first two Incentive Claim Forms submitted by each new Applicant and/or Solar Contractor. After the completion of two successful field inspections, each Applicant will have a minimum one in seven projects inspected in the program overall, but each Program Administrator may inspect more projects from any particular Applicant or Solar Contractor. The Program Administrators may determine whether to conduct an onsite field inspection randomly and/or based on Applicant or Solar Contractors' participation in the CSI Program. Parameters that may affect frequency or incidence of onsite field inspection include: Applicant or Solar Contractor being new to the CSI program, frequency of new applications in the program, and results of prior CSI onsite field inspections, or results of prior CSI Project Reviews.

- Payment terms (payment dates and dollar amounts)
- Printed names and signatures of the purchaser and the company's authorized representative.

The above requirements are sufficient evidence of an agreement to purchase and install a system for cases where a contractor sells and installs the system.

When a General Contractor subcontracts the Solar Installation on behalf of the Host Customer, the subcontract agreement will fulfill the requirements outlined in this section.

4.11.2.3 Copy of Executed Alternative System Ownership Agreement (If System Owner is Different from Host Customer)

For all 1- and 2-Step projects, the Applicant must submit a copy of Executed Alternative System Ownership agreement with the Reservation Request Package.

4.11.2.4 Copy of RFP or solicitation (MASH only)

Within 60 days after the initial Reservation Notice, government, non-profit, and public entities must submit a copy of the Request for Proposals (RFP), notice to Invite Bids, or similar solicitation issued for the installation, lease, and/or purchase of the system proposed for the Project. The RFP or solicitation must include sufficient documentation details including the scope of work, schedule, terms, budget, and system components to be installed.

For government, non-profit, and public entities not issuing an RFP for the Project, all other Proof of Project Milestone documentation must be submitted within Proof of Project Milestone Date.

4.11.3 Incentive Claim Form Package

4.11.3.1 Complete Incentive Claim Form with Signatures

A completed Incentive Claim Form must be submitted. It must be read, completed, and signed by both the Host Customer and System Owner (if different). Any changes in the system upon completion of the Project, including any changes to the name of the contractor completing the Project, must include supporting documentation and a recalculated Incentive amount.

Note that solar electric displacing systems do not require interconnection.

For information on the interconnection process, see Section 2.6.

4.11.3.2 Performance Monitoring and Reporting Service (PMRS) Contract or Cost Cap Exemption Documentation

For all PBI systems, EPBB systems > 10 kW and any other systems installing a PMRS, it must be indicated on the CSI Incentive Claim Form that a PMRS is installed and name the eligible PMRS provider. Systems receiving an EPBB incentive must also indicate the PMRS provider on the Incentive Claim Form or submit PMRS Cost Cap Exemption Documentation if no eligible PMRS is installed. All systems installing PMRS must contract with the provider for a minimum of 5 years and must report 15 minute interval production data quarterly to the PAs. The System Owner must provide a copy of the PMRS contract upon request of the PA; however, it is not a requirement to submit the contract in the Incentive Claim package.

Systems receiving a MASH incentive must either indicate the PMRS provider on the Incentive Claim Form or submit PMRS Cost Cap Exemption Documentation if no eligible PMRS is installed (see Section 4.5.2.3.1 for details).

See Section 5: Metering Requirements for additional information on PMRS.

4.11.3.3 Copy of Executed PDP Contract

All PBI systems are required to have a PDP and therefore a copy of the executed contract for a PDP, a letter from the PDP stating the Host Customer has purchased its service, or an invoice from the Solar Contractor clearly showing the PDP information must be provided. Whichever document is submitted must clearly identify the PDP information, including the name of the PDP, the product or service purchased and the term of agreement, along with the address of the associated solar energy system Site. A separate contract is not required if the same company is providing both the PMRS and PDP services as long as the contract specifies they are providing services that satisfy both requirements.

See Section 5: Metering Requirements for additional information on PDP.

4.11.3.4 Documentation of Load Allocation (MASH Track 1B only)

MASH Applicants must demonstrate that the load allocation of the solar energy system matches the applied for Track 1A/1B incentives.

4.11.3.5 Signed Field Verification Certification Form

The Solar Contractor must perform a Field Verification prior to submitting the Incentive Claim Form. The Field Verification Certification Form must be signed by the contractor and submitted to the Host Customer. A copy of the signed Field Verification Form must be retained by the contractor and may be requested by the Program Administrator at any time after an Incentive Claim Form is submitted. A copy of the Field Verification Form can be found on the Go Solar California website: http://www.gosolarcalifornia.org/documents/csi.php. ~~with the Incentive Claim Form (for Reservation Request Applications first received on or after 7/1/09).~~ See section 7 for Field Verification requirements.

4.11.3.6 Copy of Retro-commissioning Report Agreement

A copy of the retro-commissioning report is required for EPBB Existing Commercial buildings ≥ 100,000 sq. ft. and Benchmarking < 75, as represented in the Commitment Agreement. See section 2.3.1.1 for more information on the Commitment Agreement.