SOMAH

APPLICATION GUIDE

SOMAH-0619

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1. About SOMAH

1.1. PROGRAM ELIGIBILITY

Additional details and information about the SOMAH program can be found in the **SOMAH Handbook**. Any utility or community choice aggregation (CCA) customer in the Pacific Gas and Electric (PG&E), Southern California Edison (SCE), San Diego Gas & Electric (SDG&E), PacifiCorp or Liberty (the IOUs) territories who owns or manages a property meeting the criteria in **SOMAH Handbook Section 2.2, General SOMAH Eligibility Guidelines**, is eligible to install a solar energy system project and receive incentives from the SOMAH program. Eligible participants in the SOMAH program must be current electric distribution customers of the IOU or the CCA at the facility (project site) where the project will be installed. Municipal and publicly owned electric utility customers are not eligible to receive incentives from the SOMAH program.

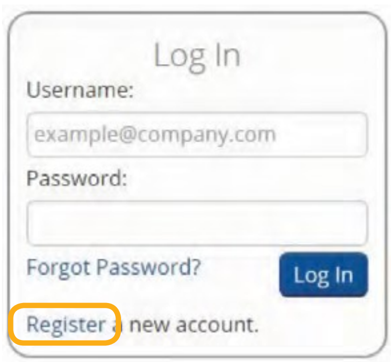
2. PowerClerk

All SOMAH applications will be submitted through the online application portal, **PowerClerk**. PowerClerk stores application information and documents, shows what tasks need to be completed throughout the project's lifecycle and manages project deadlines.

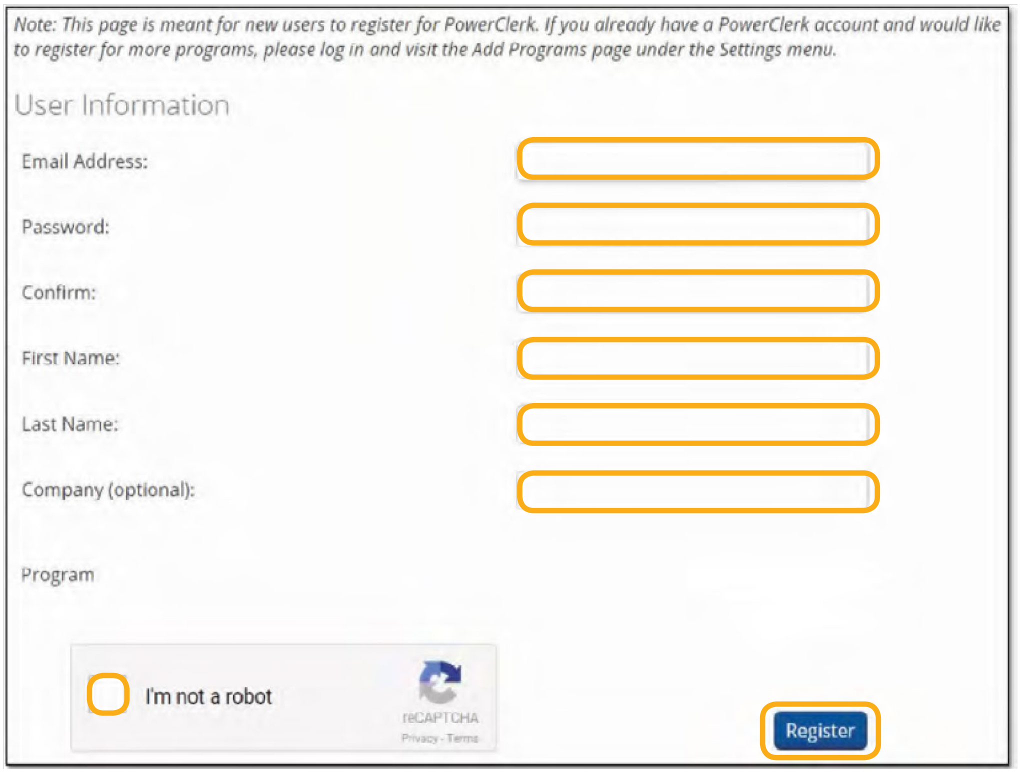
2.1. CREATING AN ACCOUNT

Please note that SOMAH uses PowerClerk's v2 platform. If you have a previous PowerClerk account from a program using PowerClerk v1, such as MASH or CSI, you will need to establish a new PowerClerk account to access the application platform for the SOMAH program.

- To create a PowerClerk account, use one of the links below for the web portals and click the "Register" link.
    - **calsomahliberty.powerclerk.com**
    - **calsomahpge.powerclerk.com**
    - **calsomahpacificorp.powerclerk.com**
    - **calsomahsce.powerclerk.com**
    - **calsomahsd.powerclerk.com**



- Complete the user information on the following page and click "Register."



- PowerClerk will then send a confirmation email with a link to confirm the user's registration. Click the link in the email to finish setting up the account.

2.2. Generating Documents

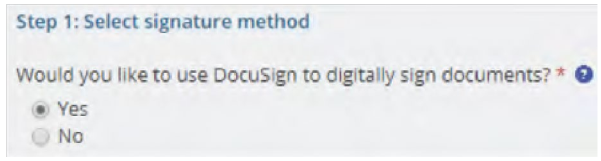
Some of the required application documents can be generated in PowerClerk, while others will not be available for generation and must be completed independently. Additionally, not all documents will be complete when generated and may require the applicant to manually complete certain fields.

a. To generate a form, click the "Generate Document" button. The generated document will automatically download.

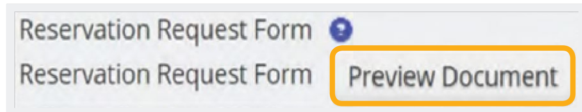
b. Review the generated document for accuracy. If any corrections need to be made, they should be corrected in PowerClerk and the document should be generated again. **Reference Application Guide Section 7.2 for more information on Suspended Applications.**

2.3. E-signatures

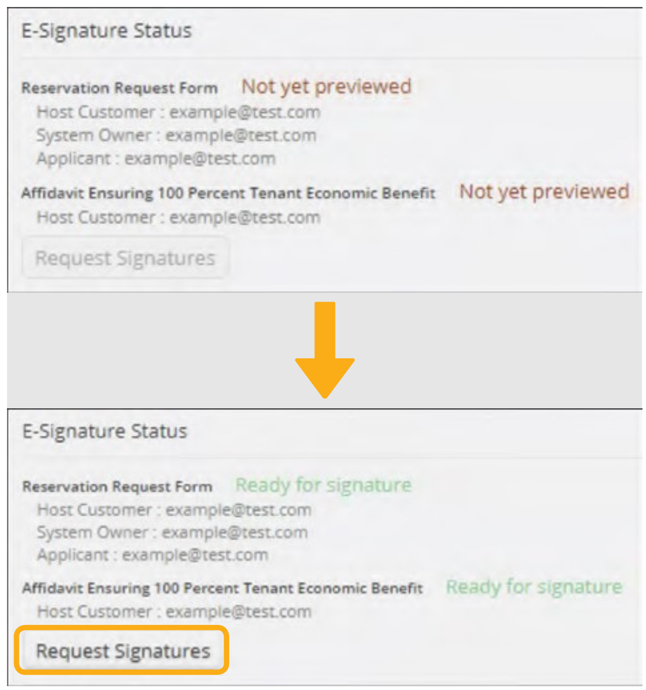
a. Several required documents throughout the application process can be electronically signed using DocuSign. Alternatively, an option will be to wet sign documents at each step. PowerClerk is configured with DocuSign to ensure a seamless process for e-signatures at no cost, should the participant choose that option.



b. To request the required signatures using DocuSign, the applicant must first click the “Preview Document” button.

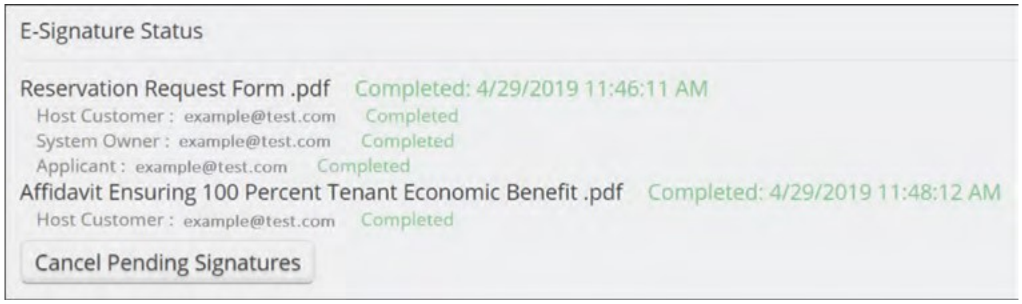


c. After the “Preview Document” button has been clicked, a copy of the document will populate and download automatically, showing an unsigned version of the form. Additionally, the “E-Signature Status” at the bottom of the page will change from “Not yet previewed” to “Ready for signature.”



d. After the “Request Signatures” button has been clicked, the “Ready for signature” text will change to “E-signature request sent” with the date and time the request was sent.

e. Each individual from whom a signature is required will receive an email from DocuSign with a link to the document. To sign the document, select the "Review Document" button in the email and follow the prompts to digitally sign the documents. As each person signs it, the text in PowerClerk will change to "Completed."


E-Signature Status

Reservation Request Form .pdf Completed: 4/29/2019 11:46:11 AM
Host Customer : example@test.com Completed
System Owner : example@test.com Completed
Applicant : example@test.com Completed
Affidavit Ensuring 100 Percent Tenant Economic Benefit .pdf Completed: 4/29/2019 11:48:12 AM
Host Customer : example@test.com Completed

Cancel Pending Signatures

3. Application Process

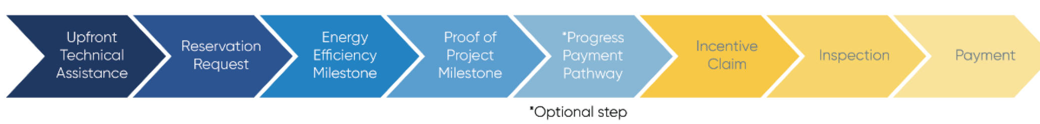
3.1. OVERVIEW: TRACK A & TRACK B

There are two tracks to apply for a SOMAH incentive: Track A and Track B. Both tracks provide fixed, upfront, capacity-based incentives for qualifying solar energy systems, using the expected performance-based buydown (EPBB) methodology. For more information about the EPBB methodology, reference Section 3.1, Expected Performance Based Buydown (EPBB) Incentives, of the **SOMAH Handbook**.

- **Track A** is intended for property owners who would like to receive technical assistance services from the SOMAH Program Administrator (SOMAH PA) to help assess the solar potential at their property.
- **Track B** is intended for property owners who do not require technical assistance to submit a project reservation and have identified an eligible contractor for their project.

There is no difference in funding between Tracks A and B. Track A earmarks the estimated incentive funding to allow for Upfront Technical Assistance. As a result, participants in Track A are required to obtain at least three bids from eligible SOMAH contractors. Projects will not be permitted to switch from Track A to Track B, or vice versa. If a project wishes to change tracks, the current application must be canceled, and a new application must be submitted.

Track A Timeline:



Track B Timeline:

By requesting Upfront Technical Assistance, the SOMAH PA will be able to provide the Host Customer with information regarding property eligibility and an eligible system size. Once the application has been submitted, funding for a project will be earmarked for a period of three months. To reserve these funds, a Reservation Request Package must be submitted prior to the end of the three-month period.

3.2. STANDARD TECHNICAL ASSISTANCE (TA)

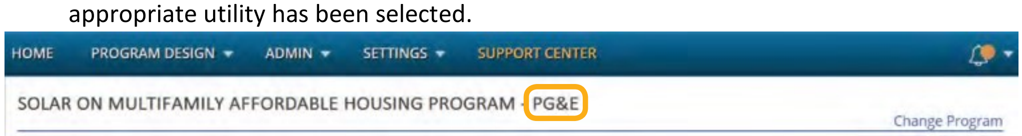
Standard Technical Assistance is different from Upfront Technical Assistance, detailed above. Standard TA is available for all projects, regardless of the Track A/Track B status. Standard TA services include: energy efficiency, clean energy, project management, post application and financial technical assistance. Standard TA is available for both property owners and contractors. For more information, see **SOMAH Handbook Section 1.3.1.2, Standard Technical Assistance Services**. Standard TA does not have a direct impact on the incentive application timeline.

4. Applying for Track A

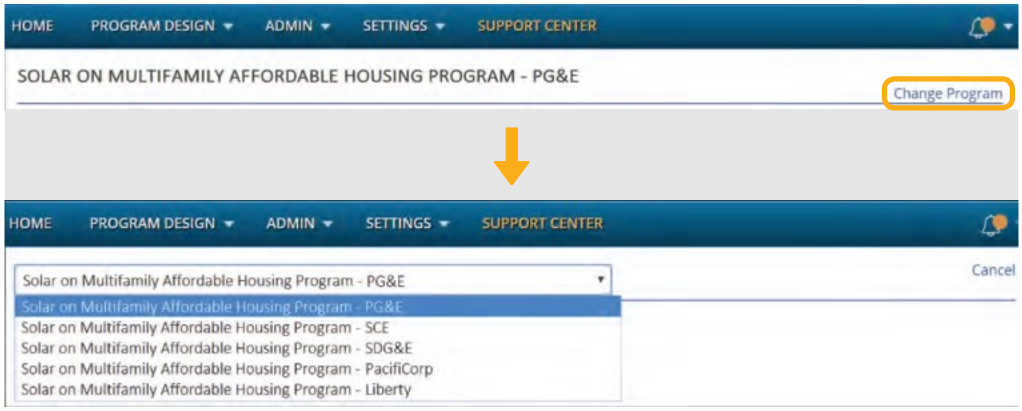
4.1. UPFRONT TECHNICAL ASSISTANCE

a. Log in to PowerClerk using the web portal for the appropriate utility (see Application Guide Section 2.1, Creating an Account, if you do not have a username and password).

b. On the landing page, look at the top of the page for the utility name to ensure the appropriate utility has been selected.

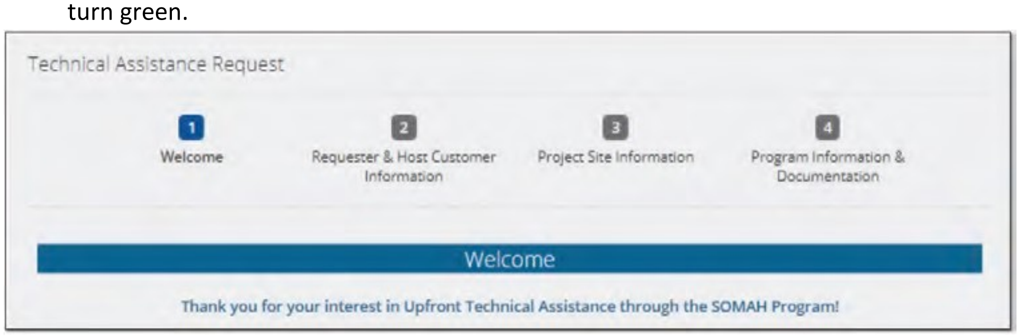


c. If the utility shown does not correspond with the servicing utility for the proposed project site, click the “Change Program” link and select the correct utility from the dropdown menu.



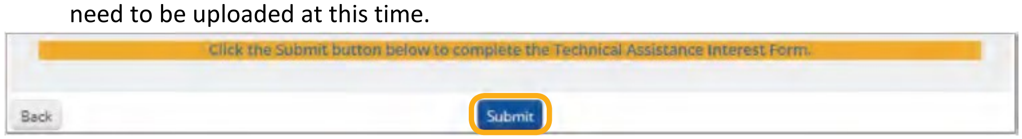
d. After confirming that the correct utility has been selected, click the "New Upfront Technical Assistance Request" button to proceed to the application form.

e. There will be a total of four pages that must be completed prior to submitting the application form. As each page is completed, the page number in the form header will turn green.

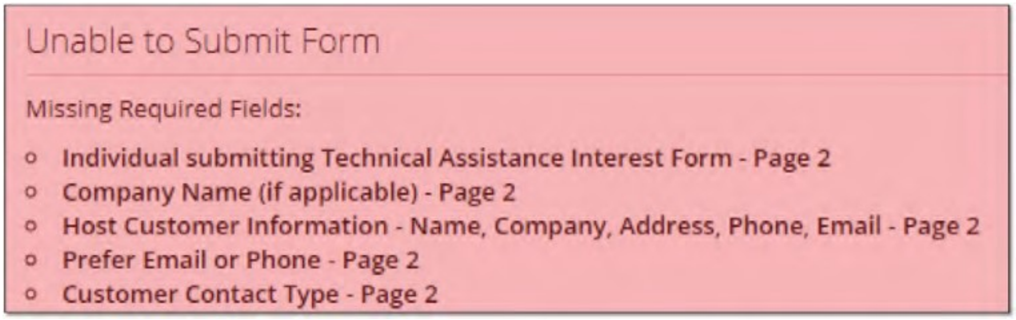


f. To move through the form, use the "Back" and "Next" buttons at the bottom of each page.

g. To submit the application, click the blue "Submit" button at the bottom of the "Program Information & Documentation" page. Supporting documentation does not need to be uploaded at this time.



h. If any required information has not been entered when the “Submit” button is pressed, a red section will appear at the bottom of the page, detailing all the necessary corrections that must be made prior to submitting the form.


Unable to Submit Form

Missing Required Fields:

- Individual submitting Technical Assistance Interest Form - Page 2
- Company Name (if applicable) - Page 2
- Host Customer Information - Name, Company, Address, Phone, Email - Page 2
- Prefer Email or Phone - Page 2
- Customer Contact Type - Page 2

i. Once the application has been submitted, the applicant will receive an email notification, letting them know that the Technical Assistance Request has been received. This notification will include the application number (XXX-SOMAH-#####), which can be used to reference the application in the future. The application status automatically changes from “Unsubmitted” to “Upfront Technical Assistance Request Submitted” with a successful submission.

4.1.1. Documentation

After the application has gone through an initial review, the assigned reviewer will send an email requesting the following supporting documentation if it has not been uploaded to PowerClerk already.

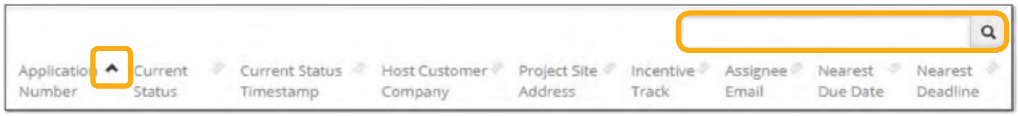
- Upfront Technical Assistance Interest Request
- Documentation of multifamily low-income housing eligibility
- Applicant must provide a copy of a recorded deed restriction, regulatory agreement or covenant that restricts the property to low-income residential housing
- Can either be located in a disadvantaged community (as identified by SOMAH) **OR**
- Covenant/restriction must show that at least 80% of property residents have incomes at or below 60% of the area median income (AMI) as determined by the Department of Housing & Community Development
- Must have at least 10 years guaranteeing affordability remaining on the term
- Properties with less than 10 years must extend affordability requirements
- Proof of a completed affordability extension from a state or local agency must be provided
- Cover Sheet for Multifamily Low-Income Housing Documentation (**Appendix D**)
- Letter of Authorization to Receive Customer Information or Act on a Customer’s Behalf (**Appendix H**)

Upon request, these documents will be required to move forward with Upfront Technical Assistance. The date in which the interest form is submitted will be the position to receive funding.

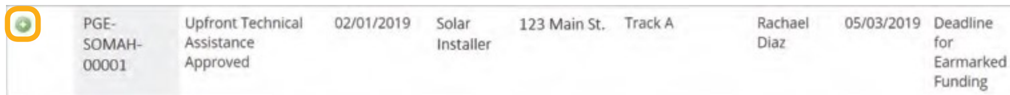
4.2. RESERVATION REQUEST PACKAGE (TRACK A)

FOR TRACK B, SEE APPLICATION GUIDE SECTION 5.1, RESERVATION REQUEST PACKAGE (TRACK B)

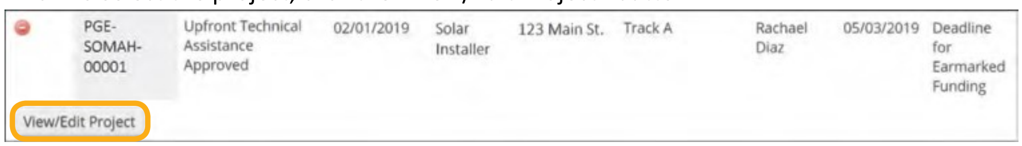
a. On the landing page, locate the application using the application number that was received after submitting the Technical Assistance form by sorting the project views or using the search bar.



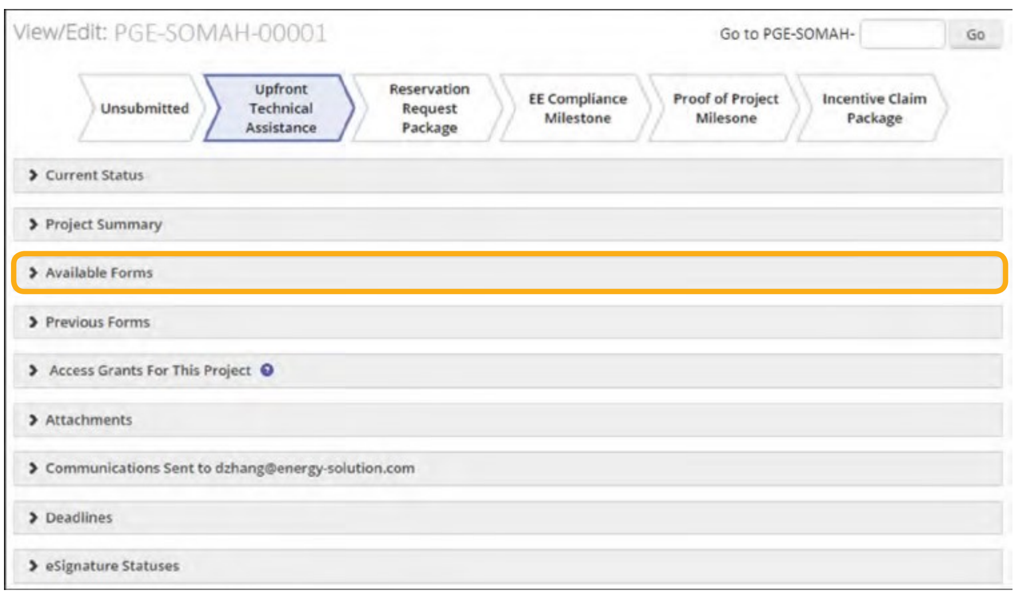
b. Expand the application by selecting the green "+" button to the left of the application information.



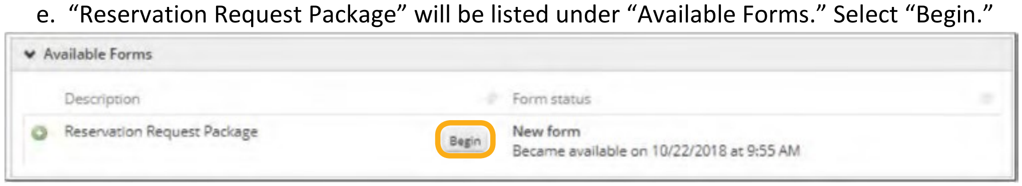
c. To select the project, click the "View/Edit Project" button.



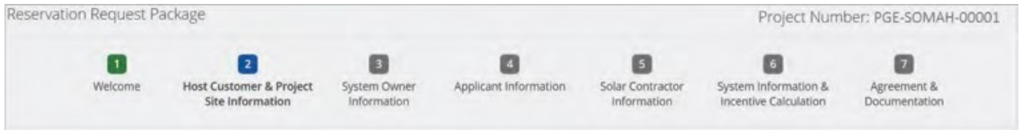
d. On the following page will be application information for the selected project. Each of the sections shown below can be expanded/contracted to show more or less information. Expand the "Available Forms" section by clicking anywhere on the section header.



e. "Reservation Request Package" will be listed under "Available Forms." Select "Begin."



f. The Reservation Request Form has seven pages that must be completed prior to submitting. As each page is completed, the page number in the form header will turn green



g. To submit the application, click the blue "Submit" button at the bottom of the "Agreement & Documentation" page. If any required information has not been entered when the "Submit" button is pressed, a red section will appear at the bottom of the page, detailing all the necessary corrections that must be made prior to submitting the form.

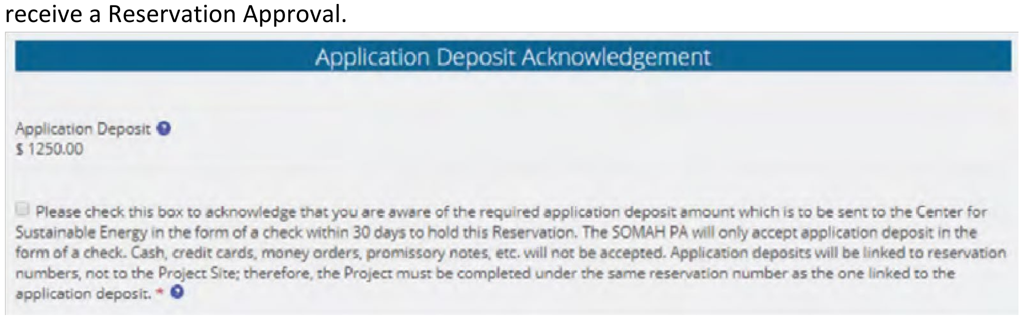
h. Once the application has been submitted, the applicant will receive an email notification, letting them know that the Reservation Request Package has been received. An approval or suspension notice will be sent once the application has been fully reviewed (in order of receipt).

4.2.1. Required Documentation

- ☐ Completed Reservation Request form with signatures (**Appendix M**)
- ☐ List of addresses on site for Energy Savings Assistance program referral (**Appendix I**)
- ☐ Affidavit Ensuring 100% Tenant Economic Benefit (**Appendix A**)
- ☐ Multiple Bids
- ☐ VNEM Load Allocation Form (**Appendix N**)

4.2.2. Application Deposit

On Page 7 of the Reservation Request Form is a section that includes the required Application Deposit amount and a checkbox to acknowledge that it must be submitted. All projects with a system size that is greater than or equal to 10 kW CEC-AC require an Application Deposit to receive a Reservation Approval.



If the Application Deposit has not been submitted by the time the Reservation Request is reviewed, an invoice will be sent to the Applicant requesting the Application Deposit within 30 days.

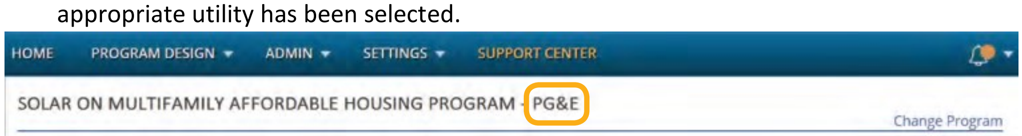
FOR FURTHER INSTRUCTIONS ON APPLYING FOR TRACK A, SKIP TO **APPLICATION GUIDE SECTION 6**, STEPS TO COMPLETE TRACKS A & B.

5. Applying for Track B

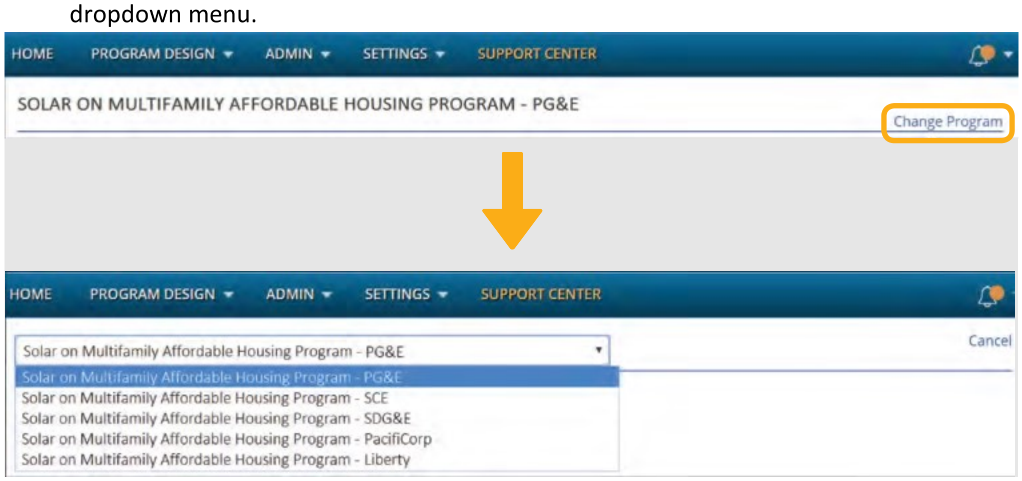
5.1. RESERVATION REQUEST PACKAGE (TRACK B)

a. Log in to PowerClerk using the web portal for the appropriate utility (see **Application Guide Section 2.1**, Creating an Account, if you do not have a username and password).

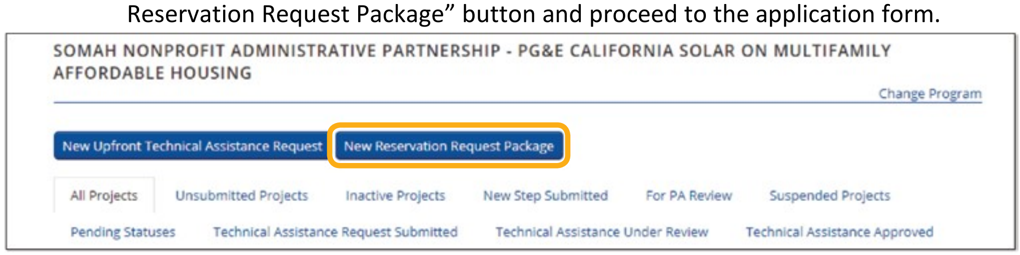
b. On the landing page, look at the top of the page for the utility name to ensure the appropriate utility has been selected.



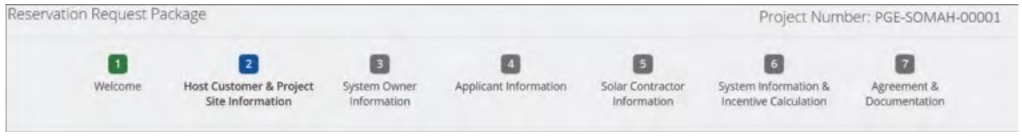
c. If the utility shown does not correspond with the servicing utility for the proposed project site, click the "Change Program" link and select the correct utility from the dropdown menu.



d. After confirming that the correct utility has been selected, click the "New Reservation Request Package" button and proceed to the application form.

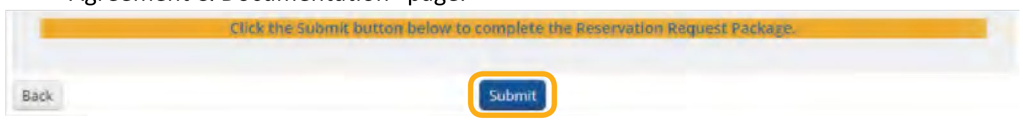


e. The Reservation Request Form will have a total of seven pages that must be completed prior to submitting. As each page is completed, the page number in the form header will turn green.

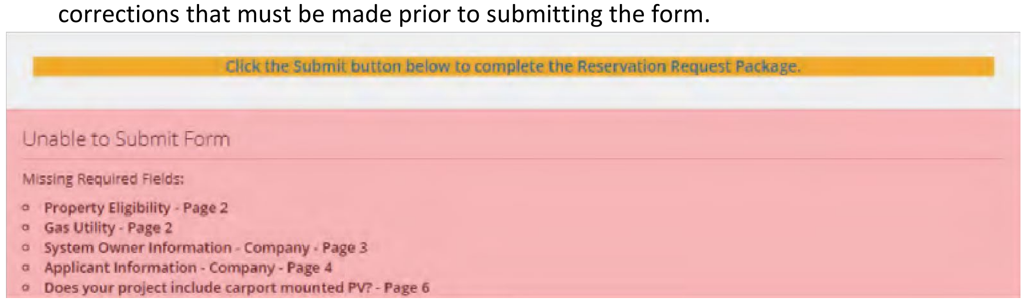


f. Applicants will be able to move through the Reservation Request Form by using the "Back" and "Next" buttons at the bottom of each page.

g. To submit the application, click the blue "Submit" button at the bottom of the "Agreement & Documentation" page.



h. If any required information has not been entered when the "Submit" button is pressed, a red section will appear at the bottom of the page, detailing all the necessary corrections that must be made prior to submitting the form.



i. An approval or suspension notice will be sent once the application has been fully reviewed (in order of receipt). After the Reservation Request Package has been reviewed and approved, an approval notification that will be sent with information regarding the due dates for each of the remaining steps and reserved incentive amount. The application status automatically updates to "Reservation Request Submitted" upon successful submission.

5.1.1. Required Documentation

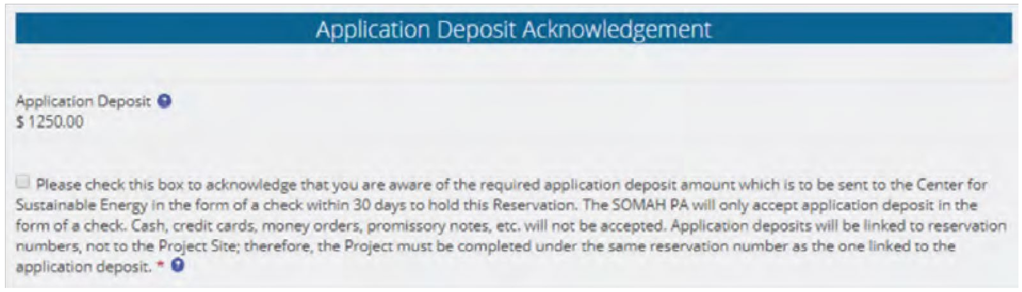
- ☐ Documentation of Multifamily Low-Income Housing Eligibility
- ☐ Cover Sheet for Multifamily Low-Income Housing Documentation (**Appendix D**)
- ☐ Letter of Authorization to Receive Customer Information or Act on a Customer's Behalf (**Appendix H**)
- ☐ Completed Reservation Request Form with signatures (**Appendix M**)
- ☐ List of address on site for Energy Savings Assistance program referral (**Appendix I**)
- ☐ Affidavit Ensuring 100% Tenant Economic Benefit (**Appendix A**)

- Multiple Bid Waiver (**Appendix K**)
- VNEM Load Allocation Form (**Appendix N**)

FOR FURTHER INSTRUCTION ON HOW TO USE THE E-SIGNATURE FEATURE THROUGH DOCUSIGN, SEE APPLICATION GUIDE SECTION 2.2.

5.1.2. Application Deposit

On Page 7 of the Reservation Request Form is a section that includes the required deposit amount and a checkbox to acknowledge that it must be submitted. All projects with a system size that is greater than or equal to 10 kW require an Application Deposit to receive a Reservation Approval.



If the Application Deposit has not been submitted by the time Reservation Request is reviewed, an invoice will be sent to the Applicant requesting the Application Deposit within 30 days.

6. Steps to Complete Tracks A & B

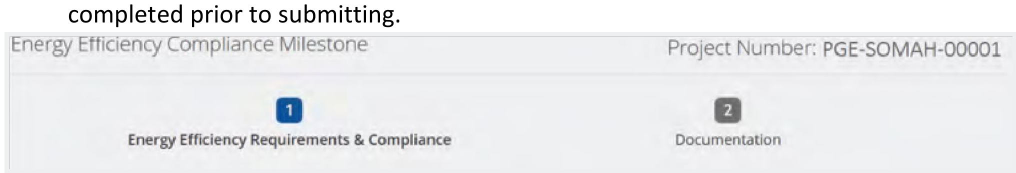
6.1. ENERGY EFFICIENCY COMPLIANCE MILESTONE

a. Log in to PowerClerk using the web portal for the appropriate utility (see **Application Guide Section 2.1**, Creating an Account, for links to the SOMAH utility portals) and locate the application.

b. Expand the application by selecting the green "+" button to the left of the application information. To select the project, click the "View/Edit Project" button.

c. Application information for the selected project will be on the following page. To proceed with the selected project and submit the Energy Efficiency Compliance Milestone, click the "Begin" button under "Available Forms."

d. The Energy Efficiency Compliance Milestone will have two pages that must be completed prior to submitting.



e. If any required information has not been entered when the "Submit" button is pressed, a red section will appear at the bottom of the page, detailing all the necessary corrections that must be made prior to submitting the form.

f. Once the application has been submitted, the applicant will receive an email notification stating that the Energy Efficiency Compliance Milestone has been received.
g. An approval or suspension notice will be sent once the application has been fully reviewed (in order of receipt). After the application has been reviewed and approved, an approval notification will be sent with information regarding the due dates for each of the remaining steps and the maximum incentivized system rating. The application status automatically updates to “Energy Efficiency Compliance Milestone Submitted” upon successful submission.

6.1.1. Required Documentation

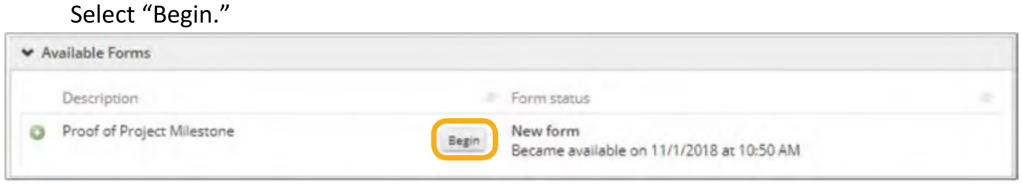
- Documentation of an on-site whole-building walkthrough energy audit at ASHRAE Level I or higher within the last three years **OR** proof of enrollment in a utility, regional network (REN), CCA program or federally provided whole-building multifamily energy efficiency program
- Whole-Building Audit Requirements Checklist (if appliable – Pathway 1)
- Solar Sizing Tool. See section 2.4.4, Solar Sizing Tool, of the **SOMAH Handbook** for more information.

6.2. PROOF OF PROJECT MILESTONE

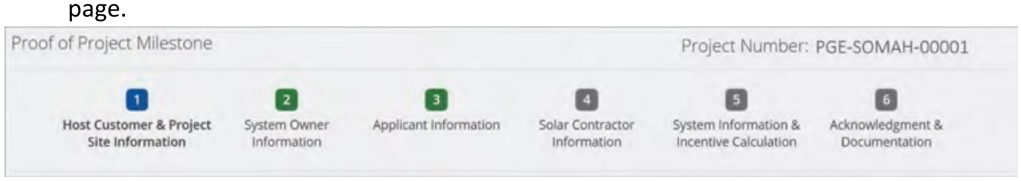
a. Log in to PowerClerk using the web portal for the appropriate utility (see **Application Guide Section 2.1**, Creating an Account, for links to the SOMAH utility portals) and locate the application.

b. Expand the application by selecting the green “+” button to the left of the application information. To select the project, click the “View/Edit Project” button.

c. Application information for the selected project will be on the following page. Under available forms will be an option to being the Proof of Project Milestone. Select “Begin.”



d. The proof of Project Milestone will have a total of six pages that must be completed prior to submitting. Applicants will be able to move through the Energy Efficiency Compliance Milestone by using the “Back” and “Next” buttons at the bottom of each page.



e. To submit the application, click the blue “Submit” button at the bottom of the “Acknowledgment & Documentation” page.

f. If any required information has not been entered when the “Submit” button is pressed, a red section will appear at the bottom of the page, detailing all the necessary corrections.

g. Once the application has been submitted, the applicant will receive an email notification, letting them know that the Proof of Project Milestone has been received. An approval or suspension notice will be sent once the application has been fully reviewed (in order of receipt). The application status automatically updates to “Proof of Project Milestone Submitted” upon successful submission.

6.2.1. Required Documentation

- Copy of Executed Contract for System Purchase & Installation (Host Customer-owned systems only)
- Copy of Alternative System Ownership Agreement (third-party owned systems only)
- Certification of Compliance with SOMAH Performance Requirements for Third-Party Owned Systems (**Appendix C**, third-party owned systems only)
- VNEM Allocation Form (**Appendix N**, if changed from Reservation Request)

6.3. PROGRESS PAYMENT PATHWAY

The Progress Payment Pathway is an alternative payment option that allows for a partial incentive payment at an earlier milestone as opposed to SOMAH’s standard single payment option upon project completion. This benefit can reduce barriers to participation for those who face capital constraints with carrying the cost of a project until completion.
This two-payment structure pays 60% of the total approved incentive upon proof of installation and the remaining of the total approved incentive once the PV system has received permission to operate by the utility and after approval of the final SOMAH Incentive Claim Milestone.

6.3.1. Eligibility

To be eligible for the Progress Payment Pathway, applicants must have received Proof of Project Milestone approval and be at least four months away from the Incentive Claim Milestone due date when the request is submitted. Complete a virtual walkthrough to confirm the system location and that the installation is mechanically complete. This virtual walkthrough will be conducted with a member of the SOMAH PA and an onsite contact. Mechanical completion, for the purposes of the progress payment, is defined as the point at which all solar PV equipment has been installed, including the net generation output (NGO) meter socket, and the system wiring has been completed.

6.3.2. Required Documentation

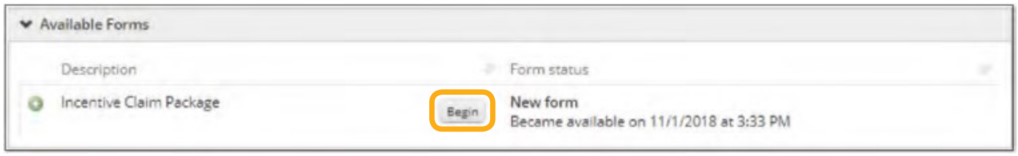
- Progress Payment Request form
- Affidavit Ensuring Tenant Education
- Supporting documentation for virtual walkthrough (if applicable)
- Electronic payment setup form (if applicable)

6.4. INCENTIVE CLAIM PACKAGE

a. Log in to PowerClerk using the web portal for the appropriate utility (see **Application Guide Section 2.1**, Creating an Account, if you do not have a username and password) and locate the application.

b. Expand the application by selecting the green "+" button to the left of the application information. To select the project, click the "View/Edit Project" button.

c. Application information for the selected project will be on the following page. Under available forms will be an option to begin the Incentive Claim Package. Select "Begin."



d. The Incentive Claim Form will have a total of nine pages that must be completed prior to submitting.

e. On Page 9 are documents that must uploaded. Select the files from your computer by clicking the "Browse" button and then finding the appropriate file to submit.

f. To submit the application, click the blue "Submit" button at the bottom of the "Final Questions & Documentation" page.

g. If any required information has not been entered when the "Submit" button is pressed, a red section will appear at the bottom of the page, detailing all the necessary corrections that must be made prior to submitting the form.

h. Once the application has been submitted, the applicant will receive an email notification, letting them know that the Incentive Claim Form has been received. A notice will be sent once the package has been fully reviewed (in order of receipt). The application status automatically to "Incentive Claim Submitted" upon successful submission.

6.4.1. Required Documentation

☐ Incentive Claim Form with signatures (**Appendix F**)

☐ VNEM Load Allocation Form (**Appendix N**, if changed from Proof of Project
Milestone) ☐ Affidavit Ensuring Tenant Education

(**Appendix A**) ☐ Job Training Affidavit (**Appendix G**) ☐

Documentation of load increase (if applicable)

Electronic payment setup form (if applicable)

6.4.2. On-site Field Inspection

After the information and documentation included in the Incentive Claim Package has been approved, an on-site field inspection will be required. The SOMAH PA will contact the Host Customer to schedule the inspection at this point. It is recommended, but not required, that the Contractor attend the inspection. If neither the Contractor nor the Host Customer can be present, the Host Customer must give the inspector permission to conduct the inspection.

Key project components will be reviewed during the inspection and must show that the system has been installed in accordance with the information provided in the Incentive Claim Package. Variances in this information may result in a suspended application or an infraction or failure.

For detailed information, see **SOMAH Handbook Section 4.6**, Onsite Field Inspections.

6.4.3. Payment and Deposit Return

Upon final approval of the Incentive Claim Package and a completed on-site field inspection, the SOMAH PA will issue the incentive payment in approximately 30 days. Payment will be made to the Host Customer or a third party, as indicated of the Incentive Claim Form and will be mailed to the address provided.

Upon verification of the completed project and SOMAH incentive payment, the Application Deposit will be returned in full to the Host Customer, unless the SOMAH PA receives a written request from the Host Customer to return the Application Deposit to a third party. See Section 4.2.2.5, Application Deposit, of the **SOMAH Handbook** for more information on the Application Deposit.

7. Miscellaneous Procedures

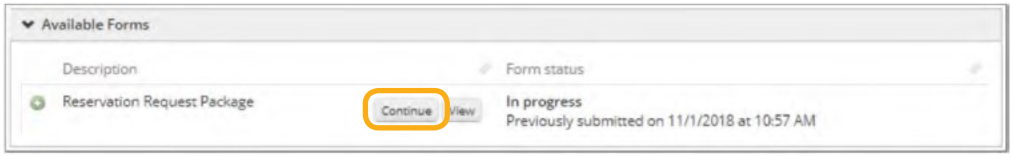
7.1. SUSPENDED APPLICATIONS

If application information is missing or needs clarification, the application will be suspended, and an email will be sent to the application with details regarding the required corrections.

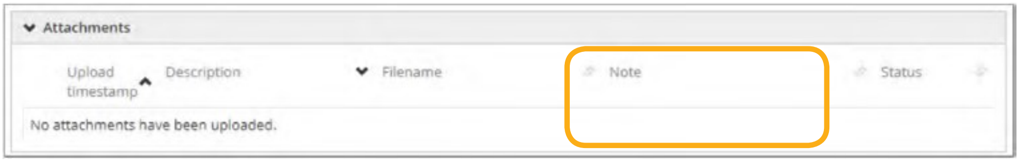
All suspended applications will have 20 days to submit required corrections or the application will be canceled.

a. To resubmit information for a suspended application, log on to PowerClerk and find the relevant application.

b. Click the “Continue” button to enter the form that requires corrections.



c. Correct all fields detailed in the suspension email and submit the form. If a submitted document requires corrections, there will be notes in the "Attachments" section describing what needs to be corrected.



7.2. DOCUMENT CORRECTIONS

7.2.1. PowerClerk-Generated Documents PowerClerk-generated documents may not be resubmitted with manual corrections (handwritten or typed over the original information), even if the changes are initialed by all parties.

- If the rejected document(s) were generated by PowerClerk, the information must be corrected in PowerClerk.
- Once all the necessary corrections have been made in PowerClerk, a new copy of the document(s) with updated information can be generated.
- The updated document(s) must be signed by the required parties and resubmitted in PowerClerk.
- A complete, legible copy of each document must be resubmitted. Partial submissions will not be accepted.

7.2.2. Other Required Documents If the rejected document(s) were not generated by PowerClerk (e.g., solar

system purchase contract, power purchase agreement, VNEM allocation form), it is acceptable for the incorrect information to be crossed out, corrected and initialed by all parties.

- If contract changes are made with an addendum, the addendum may be submitted.
- The updated document(s) must be signed by the required parties and resubmitted in PowerClerk.
- A complete, legible copy of each document must be resubmitted. Partial submissions will not be accepted.

7.3. TIME EXTENSIONS

Due date extensions are only available for the Incentive Claim Package and may be granted for periods of up to 180 days. To request an extension, submit a completed copy of the Extension Request Form (**Appendix E**) with any necessary documentation to the assigned reviewer.

7.4. CANCELED AND WITHDRAWN APPLICATIONS

Either the Host Customer or System Owner may withdraw from the project for any reason by providing written notice of withdrawal to the SOMAH PA.

In the event a party chooses to withdraw, the Host Customer will retain the rights to the Reservation and may preserve the Reservation and corresponding application number by submitting a new Reservation Request Package within 14 days of the written notification of withdrawal from the project from the System Owner or Host Customer. If a new Reservation Request Package is not submitted, the application will be canceled. **Canceled or withdrawn applications will forfeit the Application Deposit and will not be reimbursed.**

8. Additional Resources

8.1 HOW TO CONTACT THE SOMAH PA **SOMAH**

program website:

CalSOMAH.org

Telephone:

858-244-1177, Ext. 5

Primary Email:

contact@CalSOMAH.org

Other Related Emails:

Technical Assistance: techassist@calsomah.org

Workforce Development and Job Training: workforce@CalSOMAH.org

Tenant Education: tenants@CalSOMAH.org

Media: media@CalSOMAH.org

Mailing Address:

Attn: SOMAH Program

3980 Sherman Street, Suite 170

San Diego, CA 92110

**Address should be used for submission of application deposits only. No application documents will be accepted in hard copy format.*

8.2. SOMAH DOCUMENT CHECKLIST

Click here to view the SOMAH Document Checklist.

This page is intentionally blank.

SOMAH

Affidavit Ensuring 100% Tenant Economic Benefit

Affidavit Ensuring 100% of Economic Benefits of Solar Energy System Generation Allocated to Tenants through VNEM on a Monthly Basis for the Life of the System or 20 years, whichever is less.

By signing this affidavit, [Host Customer Name], with respect to the solar electric system project ("System") at [Property Name], located at [Project Site Address], which is partially funded by the Program Administrator for the Solar On Multifamily Affordable Housing ("SOMAH") Program under Application Number XXX-SOMAH-XXXX, certifies and declares under penalty of perjury under the laws of the State of California that each of the statements in the paragraphs below are complete, true, and correct.

1. Host Customer certifies that it will allocate at least 51% of the System's electric generation to tenants, allocate solar benefits through Virtual Net Energy Metering, and ensure tenants continue to receive the same portion of the System's electric generation on a monthly basis for the life of the system, or 20 years, whichever is less.

2. Host Customer certifies that it will exclude solar benefits (allocated through Virtual Net Energy Metering) from the project's utility allowance calculations in order to prevent the recapture and/or diminishment of tenant economic benefits from solar through rent and utility allowance adjustments related to the solar system.

3. Host Customer certifies that, for California Tax Credit Allocation Committee projects, it will not use the California Utility Allowance Calculator to recapture and/or diminish tenant economic benefits from solar.

4. Host Customer agrees that the SOMAH Program Administrator reserves the right to request further documentation that demonstrates that the benefits will be passed to the tenants as provided in this Affidavit.

Although it is not mandatory, the SOMAH PA also strongly encourages the Host Customer to compensate the tenants for performance guarantee shortfalls, either directly (e.g. rent reduction, direct check to tenant) or indirectly through common area improvements.

I declare under penalty of perjury, under the laws of the State of California, that all of the foregoing statements are true and correct.

Host Customer

Signature:

[Host Customer Name]

[Date]

V1

SOMAH

Affidavit Ensuring Tenant Education

By signing this affidavit, [Host Customer Name], with respect to the solar electric system project ("System") at [Project Site Address], which is partially funded by the Program Administrator for the Solar on Multifamily Affordable Housing Program (SOMAH)) under Application Number [SOMAH Application Number], certifies and declares under penalty of perjury under the laws of the State of California that each of the statements in the paragraphs below are complete, true and correct.

1) Start date of construction:

2) The Host Customer provided SOMAH approved education materials to all tenants 30 days or fewer prior to the start of construction. Projects constructed prior to SOMAH Program launch refer to note below.*

3) The Host Customer provided such information by the following means:

    a. Direct delivery to residence,**OR**
    b. Mailer sent via U.S. Postal Service

    And at least one or more of the following:

    a. Email Notification
    b. In-person meeting/workshop
    c. Other: ____

    **Any projects that started construction prior to the SOMAH Program launch must meet the tenant education requirements post installation using the SOMAH approved tenant materials. Host Customers will be requested to provide additional documentation of the indicated means. Documentation must be provided and may include a forwarded email or campaign statistics (click and open rate) or a tenant workshop sign-in sheet.*

4) The Host Customer provided such information in languages accessible to all tenants.

5) The Host Customer agrees that the SOMAH Program Administrator (PA) reserves the right to request further documentation that demonstrates that property owners have conducted tenant engagement.

By signing this Affidavit, I certify that I am authorized to sign this Affidavit on behalf of the Host Customer. I also declare under penalty of perjury, under the laws of the State of California, that all of the foregoing statements are true and correct.

Host Customer

Signature:

[Host Customer Name]

[Date]

V1

SOMAH

Certification of Compliance with SOMAH Performance Requirements for Third-Party Owned Systems

Complete the document and sign below. Submit this form with the SOMAH Proof of Project Milestone. All third-party owned systems are required to provide operations, maintenance and monitoring services for the full term of the third-party ownership agreement. Additionally, third-party owned systems must include performance guarantees ensuring the systems will produce a minimum of 90% of the excepted annual output (kWh) as calculated by the EPBB calculator and provide financial compensation for any production shortfalls in a given year.

List name and address of multi-family low income property:

Property Name:

Address:

Please fill out the information required below:

Specify the contract terms below and indicate the page and section where this information can be found in the third-party ownership contract.

CEC-AC System Size	________ kW	Page_____, Section_____
1st Year Annual Production (per EPBB)	________ kWh	Page_____, Section_____
PPA or Lease: ☐ PPA	☐ Lease	Page_____, Section_____
Third-Party Ownership Contract Term	________ Years	Page_____, Section_____
PPA/Lease Rate	$_______ /kWh $_______ /month	Page_____, Section_____
PPA/Lease Rate Escalator	$_______percent/year	Page_____, Section_____

The undersigned declare under penalty of perjury under the laws of the State of California that the information provided on this form is accurate and true.

______________________________ ________________

Host Customer Signature Date

V1

SOMAH

Solar on Multifamily Affordable Housing (SOMAH) Program Multifamily Low-Income Housing Documentation Cover Sheet

Complete the document and sign below. Submit this form with the SOMAH Reservation Request Package.

Property Name:

Address:

Number of Units:

Section I

The property meets the SOMAH eligibility requirement under the following criteria:

1. The property is **financed** with one of the following:
   - Low income housing tax credits,
   - Tax exempt mortgage revenue bonds,
   - General obligation bonds, or
   - Local, state or federal loans or grants

   AND rents of the occupants who are lower-income households do not exceed those prescribed by deed restrictions or regulatory agreements pursuant to the terms of the financing or financial assistance.

   AND for which the following applies:

☐ Option A	80% of property residents have incomes at or below 60% of the area median income as determined by the Department of Housing and Community Development
☐ Option B	The property is located in a disadvantaged community as identified by the California Environmental Protection Agency

Section II

Specify which of the following public entities or non-profit housing provider with authority to regulate affordable housing costs and/or rents the documentation comes from.

☐	California Tax Credit Allocation Committee (TCAC)
☐	California Debt Limit Allocation Committee (CDLAC)
☐	California Department of Housing and Community Development/ The California Housing Finance Agency (HCD/CALHF)
☐	U.S. Department of Housing and Urban Development (HUD)

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SOMAH

☐	U.S. Department of Agriculture (USDA)
☐	A Redevelopment Agency (RDA) or RDA successor agency
☐	A Housing Authority, or a City or County in the case of a project funded by HUD HOME Funds
☐	City or County in the case of a project funded by a local bond measure

If the documentation is not signed by both the customer of record and one of the public entities above or non-profit housing provider, please indicate evidence that exists that the relevant affordability requirements of PUC 2852 and Health and Safety Codes referenced in the CPUC code have been met for all units presented by the applicant as affordable under these code sections. Please submit related documentation to the Program Administrator.

1. Please indicate the **compliance period in years** for which the low income restriction is in effect.

Compliance Period Start Date:	Compliance Period End Date:

2. Please indicate on which page of the documentation language exists that describes the **compliance period.**	Page:
3. Please indicate on which page of the documentation language exists that describes the **rent restriction.**	Page:
4. **Section I, Option A only:** Please indicate on which page of the documentation language exists that defines the 80% of low income households are at or below 60% Area Median Income (AMI).	Page:
5. **Section I, Option B only:** Please indicate the census tract number of the disadvantaged community where the property is located.	Census Tract Number:

Section III

The property meets the SOMAH eligibility requirement that the property is NOT subject to the requirements of any of the following U.S. Department of Housing and Urban Development (HUD) programs.

1. Project-based Section 8
   a. New Construction
   b. State Agency Financed
   c. Substantial Rehabilitation
   d. Section 202/8
   e. Rural Housing Services (RHS) Section 515/8
   f. Loan Management Set-Aside (LMSA)
   g. Property Disposition Set-Aside (PDSA)
2. Section 101 Rent Supplement
3. Section 202/162 Project Assistance Contract (PAC)

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SOMAH

4. Section 202 Project Rental Assistance Contract (PRAC)
5. Section 202 Senior Preservation Rental Assistance Contracts (SPRAC)
6. Section 811 PRAC; Project Rental Assistance (PRA)
7. Section 236 H. Section 236 Rental Assistance Payments (RAP)
8. Section 221(d)(3) Below Market Interest Rate (BMIR)

Please acknowledge the SOMAH eligibility requirement of Section II regarding participation in HUD programs.	Initial here:

Host Customer Signature

The undersigned declare under penalty of perjury under the laws of the State of California that

1. the information provided on this form is accurate and true;
2. the low-income documentation is not contingent upon receiving a SOMAH incentive.

____ __________________

Host Customer Signature Date

V1

SOMAH

SOMAH Reservation Expiration Extension Request

*Application Number:	
*Host Customer Name:	
Host Customer e-mail:	
*Site Address:	
*Reservation Expiration Date:	
Service Account(s):	

*Applicant Company:	
*Applicant Contact:	
*Applicant Contact e-mail:	

** Denotes a required field.*

Identified below are some of the eligible reasons for an extension request and the associated documentation requirements. Please identify the eligible reason(s) for an extension and submit the appropriate documentation with this extension request. Projects that fail to meet the criteria will not be granted an extension.

Mark Selection	Requested Extension (days)	Reason	Documentation Requirement(s)
		Circumstances beyond the control of the reservation holder that prevented the system from being installed as described in the Reservation Request Package	• Documentation substantiating why extension is needed • Cost documentation must demonstrate that the system purchaser has incurred at least 50 percent of the reserved system's total purchase price
		There was a problem in the permitting process and it was the cause of delay, documentation, such as any correspondence with the building department	• Provide documentation, such as any correspondence with the building department and timeline/chronology of events from initial permitting request to approval, that support problem in the permitting process • Cost documentation must demonstrate that the system purchaser has incurred at least 50 percent of the reserved system's total purchase price
		Contractor's license becomes suspended, and applicant must find another contractor	• Must provide notice and proof of contractor's license being suspended
		Defective panels	• Clear photos of defective panels
		Other (provide explanation on the following page)	• Cost documentation must demonstrate that the system purchaser has incurred at least 50 percent of the reserved system's total purchase price & documentation substantiating why extension is needed.

If applicable, please provide an explanation in the space provided below along with the required documentation. For an extension request where the reason identified in the previous table is "Other", please provide a detailed explanation below. Attach additional pages if necessary.

SOMAH

FOR SOMAH PA INTERNAL USE ONLY	
The Extension Request for application number, _____-SOMAH-_____, Host Customer, ____________________is	
☐ **Granted**	☐ **Denied for the following reason(s)**
For the term of not more than ________ days	☐ Not eligible per SOMAH Program Handbook, section 4.6.2
The new due date for this project is ______________ (not to exceed 180 calendar days from current Reservation Expiration Date)	☐ Insufficient documentation provided to support extension request
☐ Mark here if CPUC/ PA Review is required	Date sent for Review:
Printed Name:	
Signed:	Date:

ICF	Solar On Multifamily Affordable Housing **Incentive Claim Form**		SOMAH
	Form Version	ICF-V1-2019	
	Application Number	XXX-SOMAH-XXXXX	
	Preparation Date	[Date]	

HOST CUSTOMER	
Contact Name	[Host Customer Name]
Company	[Host Customer Company]
Mailing Address	[Host Customer Address]
City, State, Zip Code	[Host Customer City, State, Zip]
Phone Number	[Host Customer Phone Number]
Email	[Host Customer Email]
SYSTEM OWNER	
Contact Name	[System Owner Name]
Company	[System Owner Company]
Mailing Address	[System Owner Address]
City, State, Zip Code	[System Owner City, State, Zip]
Phone Number	[System Owner Phone Number]
Email	[System Owner Email]
PAYEE	
Contact Name	[Payee Name]
Company	[Payee Company]
Mailing Address	[Payee Address]
City, State, Zip Code	[Payee City, State, Zip]
Phone Number	[Payee Phone Number]
Email	[Payee Email]
APPLICANT	
Contact Name	[Applicant Name]
Company	[Applicant Company]
Mailing Address	[Applicant Address]
City, State, Zip Code	[Applicant City, State, Zip]
Phone Number	[Applicant Phone Number]
Email	[Applicant Email]
SOLAR CONTRACTOR	
Contact Name	[Solar Contractor Name]
Company	[Solar Contractor Company]
Mailing Address	[Solar Contractor Address]
City, State Zip Code	[Solar Contractor City, State, Zip]
Phone Number	[Solar Contractor Phone Number]
Email	[Solar Contractor Email]
CSLB License Number	[Solar Contractor CSLB License Number]
PROJECT SITE INFORMATION	
Site Address	[Project Site Address]
City, State, Zip Code	[Project Site City, State, Zip]

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EQUIPMENT & SYSTEM INFORMATION	
System Purchase Type	[Host Customer Owned/PPA/Solar Lease]
System Uses All Smart Inverters	[Yes/No]
PV System Specification	[PV System Equipment, Tilt, Azimuth, Shading]

Associated Costs					
Photovoltaic Modules	Inverter(s)	Carport Materials and Installation	PMRS	Permitting Fees	Balance of System
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total Project Cost:					**$0.00**

PROJECT INCENTIVE CALCULATION		
	Tenant Area	**Common Area**
Incentive Level	$0.00	$0.00
Load Allocation	0%	0%

CEC-AC System Rating	0 kW CEC-AC
CSI-AC System Rating	0 kW CSI-AC
Maximum Incentivized System Size	0 kW CEC-AC
Unincentivized System Capacity	0 kW CEC-AC
PV System Est. Annual Production	0 kWh
Incentive Calculation Details *System Design Factor	[Incentive Calculation Details] = $0.00
Approved Incentive Amount	$0.00

PERFORMANCE MONITORING AND REPORTING SERVICE
[Contracted Performance Monitoring and Reporting Service]

SIGNATURES		
Host Customer	**System Owner**	**Applicant**
X [Host Customer Signature] [Host Customer Name] [Host Customer Company]	X [System Owner Signature] [System Owner Name] [System Owner Company]	X [Applicant Signature] [Applicant Name] [Applicant Company]

V1

SOMAH

Job Training Affidavit

Instructions: Review all Solar on Multifamily Affordable Housing (SOMAH) job training requirement information in the SOMAH Handbook (Section 2.7), provide all requested information, and submit the completed and signed affidavit to the SOMAH Program Administrator. Both the contractor and the job trainee(s) need to complete and sign this affidavit.

Workforce Partnership Requirement and Basic Agreement: For each SOMAH project, the contractor agrees to hire the appropriate number of job trainees for a minimum number of hours based on system size, as outlined in the table below.

System Size (CEC-AC)	Required Number of Job Trainees
0 kW – < 50 kW	1 trainee and no less than 40 hours
50 kW – < 100 kW	2 trainees and no less than 40 hours each trainee
100 kW and greater	2 trainees and no less than 80 hours each trainee

The trainee(s) may participate in the SOMAH project in a direct or support role, in the categories of PV installation and/or project design/project engineering. The work of the trainee(s) can be on or off the project site, but must be specific to the SOMAH project address. The contractor's insurance must cover the job trainee(s), and the contractor agrees to pay the trainee at their entry level or temporary worker wage, or 1.4 times the city minimum wage where the SOMAH project is located, whichever is higher. The contractor is required to enter all SOMAH job training opportunities on the SOMAH Job Training Portal, with the exception of projects that begin construction prior to program launch.

Eligible Trainees and Job Training Programs

An eligible (qualified) job trainee is an individual who has completed the Job Trainee Intake Form (Appendix) and is either:

a. A temporary employee currently enrolled in an eligible job training program; or
b. A permanent employee who graduated from an eligible job training program within 12 months of the installation project; or
c. A tenant residing in the SOMAH property.

Eligibility as a job trainee lasts for one year beginning from the trainee's first day of work on any SOMAH project.

Eligible job training programs include those offered by a California Community College or other PV-training programs offered to the public by local government workforce development programs, community non-profits, private enterprises, or the electrical workers union with 40+ hours of instructional and/or hands-on PV installation and design training.

SOMAH Project Information – Please Type		
SOMAH client name		
SOMAH project address	Project city	Project zip

Solar Contractor Information – Please Type		
Contractor name	Contractor CA license number	
Contractor address	City	Zip

Size of SOMAH Project (CEC-AC kW):	Number of Trainees:

Job Trainee (1) Information – Please Type		
Job trainee name		
Job trainee address	City	Zip
Job trainee phone number	Job trainee email	
Job training organization where trainee received or is currently receiving training	Job training organization address	
Date of prior job training program completion (if already graduated)	How was job trainee referred to contractor?	
Type of SOMAH installation work and assistance performed by the job trainee: Notes/other:	Dates and hours job trainee worked on SOMAH project: Trainee start date: Trainee end date:	

	Total hours worked:
Job trainee wage/salary:	Is job trainee temporary or permanent employee?

Job Trainee (2) Information – Please Type		
Job trainee name		
Job trainee address	City	Zip
Job trainee phone number	Job trainee email	
Job training organization where trainee received or is currently receiving training	Job training organization address	
Date of prior job training program completion (if already graduated)	How was job trainee referred to contractor?	
Type of SOMAH installation work and assistance performed by the job trainee: Notes/other:	Dates and hours job trainee worked on SOMAH project: Trainee start date: Trainee end date: Total hours worked:	
Job trainee wage/salary:	Is job trainee temporary or permanent employee?	

AFFIDAVIT

By participating in the SOMAH Program as a Contractor, I understand and agree to the SOMAH Program rules and guidelines referenced and described herein about the job training requirement. I declare under the penalty of perjury that the information in this Affidavit is true and correct to the best of my knowledge.

Name of Contractor Representative: ______________________________

Title: ______________________________

Signature (Contractor): ____________________ Date: __________

(Job Trainee #1)

By participating in the SOMAH Program as a Job Trainee, I understand and agree to the SOMAH Program rules and guidelines referenced and described herein about the job training requirement. I declare under the penalty of perjury that the information in this Affidavit is true and correct to the best of my knowledge.

Name of Job Trainee: ______________________________

Title: ______________________________

Signature (Job Trainee): ____________________ Date: __________

(Job Trainee #2)

By participating in the SOMAH Program as a Job Trainee, I understand and agree to the SOMAH Program rules and guidelines referenced and described herein about the job training requirement. I declare under the penalty of perjury that the information in this Affidavit is true and correct to the best of my knowledge.

Name of Job Trainee: ______________________________

Title: ______________________________

Signature (Job Trainee): ____________________ Date: __________

The following Letter of Authorization is for demonstration purposes only and may change at a later date.

AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION OR ACT ON A CUSTOMER'S BEHALF	SUBMITTED TO THE FOLLOWING. Please check all that apply: ☐ PG&E ☐ SoCalGas ☐ SCE ☐ SDG&E

THIS IS A LEGALLY BINDING CONTRACT—READ IT CAREFULLY

(Please Print or Type)

I, ______________________ ______________________
NAME TITLE (IF APPLICABLE

of ______________________ (Customer) have the following mailing address
NAME OF CUSTOMER OF RECORD

______________________ , and do hereby appoint
MAILING ADDRESS CITY STATE ZIP

______________________ of ______________________
NAME OF THIRD PARTY MAILING ADDRESS

____
CITY STATE ZIP

to act as my agent and consultant (Agent) for the listed account(s) and in the categories indicated below:

ACCOUNTS INCLUDED IN THIS AUTHORIZATION:

1. ______________________ SERVICE ADDRESS CITY SERVICE ACCOUNT NUMBER
2. ______________________ SERVICE ADDRESS CITY SERVICE ACCOUNT NUMBER
3. ______________________ SERVICE ADDRESS CITY SERVICE ACCOUNT NUMBER

(For more than three accounts, please list additional accounts on a separate sheet and attach it to this form)

INFORMATION, ACTS AND FUNCTIONS AUTHORIZED – This authorization provides authority to the Agent. The Agent must thereafter provide specific written instructions/requests (e-mail is acceptable) about the particular account(s) before any information is released or action is taken. In certain instances, the requested act or function may result in cost to you, the customer. Requests for information may be limited to the most recent 12 month period.

I (Customer) authorize my Agent to act on my behalf to perform the following specific acts and functions (initial all applicable boxes):

☐ 1. Request and receive billing records, billing history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility[1].

☐ 2. Request and receive copies of correspondence in connection with my account(s) concerning (initial all that apply):

☐ a. Verification of rate, date of rate change, and related information;
☐ b. Contracts and Service Agreements;
☐ c. Previous or proposed issuance of adjustments/credits; or
☐ d. Other previously issued or unresolved/disputed billing adjustments.

☐ 3. Request investigation of my utility bill(s).

☐ 4. Request special metering, and the right to access interval usage and other metering data on my account(s).

☐ 5. Request rate analysis.

☐ 6. Request rate changes.

☐ 7. Request and receive verification of balances on my account(s) and discontinuance notices.

[1] The Utility will provide standard customer information without charge up to two times in a 12 month period per service account. After two requests in a year, I understand I may be responsible for charges that may be incurred to process this request.

Revised 10/28/99 Page 1 of 2

SAMPLE

The following Letter of Authorization is for demonstration purposes only and may change at a later date.

AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION OR ACT ON A CUSTOMER'S BEHALF

I (CUSTOMER) AUTHORIZE THE RELEASE OF MY ACCOUNT INFORMATION AND AUTHORIZE MY AGENT TO ACT ON MY BEHALF ON THE FOLLOWING BASIS[2] (initial one box only):

[2]If no time period is specified, authorization will be limited to a one-time authorization

☐ One time authorization only (limited to a one-time request for information and/or the acts and functions specified above at the time of receipt of this Authorization).

☐ One year authorization - Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the twelve month period from the date of execution of this Authorization.

☐ Authorization is given for the period commencing with the date of execution until 12/31/2022 (Limited in duration to three years from the date of execution.) Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the authorization period specified herein.

RELEASE OF ACCOUNT INFORMATION:

The Utility will provide the information requested above, to the extent available, via any one of the following. My (Agent) preferred format is (check all that apply):

☒ Hard copy via US Mail (if applicable).

☒ Facsimile at this telephone number: 858-244-1178

☒ Electronic format via electronic mail (if applicable) to this e-mail address:

I (Customer), ______________________ (print name of authorized signatory), declare under penalty of perjury under the laws of the State of California that I am authorized to execute this document on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I further certify that my Agent has authority to act on my behalf and request the release of information for the accounts listed on this form and perform the specific acts and functions listed above. I understand the Utility reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I authorize the Utility to release the requested information on my account or facilities to the above Agent who is acting on my behalf regarding the matters listed above. I hereby release, hold harmless, and indemnify the Utility from any liability, claims, demands, causes of action, damages, or expenses resulting from: 1) any release of information to my Agent pursuant to this Authorization; 2) the unauthorized use of this information by my Agent; and 3) from any actions taken by my Agent pursuant to this Authorization, including rate changes. I understand that I may cancel this authorization at any time by submitting a written request. **[This form must be signed by someone who has authority to financially bind the customer (for example, CFO of a company or City Manager of a municipality).]**

______________________ AUTHORIZED CUSTOMER SIGNATURE

______________________ TELEPHONE NUMBER

Executed this ________ **day of** ________ (MONTH) ________ (YEAR) **at** ______________________ (CITY AND STATE WHERE EXECUTED).

I (Agent), hereby release, hold harmless, and indemnify the Utility from any liability, claims, demand, causes of action, damages, or expenses resulting from the release of customer information obtained pursuant to this authorization and from the taking of any action pursuant to this authorization, including rate changes.

______________________ AGENT SIGNATURE

______________________ TELEPHONE NUMBER

______________________ COMPANY

Executed this ________ **day of** ________ (MONTH) ________ (YEAR)

Revised 10/28/99

Page 2 of 2

I. LIST OF ADDRESSES ON SITE FOR ESA PROGRAM REFERRAL

SOMAH Energy Saving Assistance (ESA) Referral Form

Instructions: Please fill out this form below with one row per apartment unit by entering the addresses for each unit within the building/apartment complex that is participating in the SOMAH program.

Example:

Street Address	Unit #	City	Zip Code
1234 Monterey Road	1	Oakland	94612
1234 Monterey Road	2	Oakland	94612

Please Note: This form MUST be saved as a PDF to be uploaded to PowerClerk.

Street Address	Unit #	City	Zip Code
123 Main St	1	San Diego	92110
123 Main St	2	San Diego	92110
123 Main St	3	San Diego	92110
123 Main St	4	San Diego	92110
123 Main St	5	San Diego	[illegible]
123 Main St	6	San Diego	92110
123 Main St	7	San Diego	[illegible]
123 Main St	8	San Diego	[illegible]
123 Main St	9	San Diego	[illegible]
123 Main St	10	[illegible]	[illegible]
123 Main St	11	[illegible]	[illegible]
123 Main St	12	[illegible]	92110
123 Main St	[illegible]	[illegible]	[illegible]
123 Main St	[illegible]	[illegible]	92110
123 Main St	15	[illegible]	92110
123 Main St	16	[illegible]	92110
123 Main St	[illegible]	[illegible]	92110
123 Main St	18	San Diego	92110
123 Main St	19	San Diego	92110
123 Main St	20	San Diego	92110
123 Main St	21	San Diego	92110
123 Main St	22	San Diego	92110
123 Main St	23	San Diego	92110
123 Main St	24	San Diego	92110
123 Main St	25	San Diego	92110
123 Main St	26	San Diego	92110
123 Main St	27	San Diego	92110
123 Main St	28	San Diego	92110
123 Main St	29	San Diego	92110
123 Main St	30	San Diego	92110
123 Main St	31	San Diego	92110
123 Main St	32	San Diego	92110
123 Main St	33	San Diego	92110
123 Main St	34	San Diego	92110

SOMAH

The following bid template is for demonstration purposes only. The SOMAH PA will finalize the bid template, along with the online bidding tool, at a later date.

Solar on Multifamily Affordable Housing Project Bid

Complete the document and sign below. Please feel free to attach any additional contract information.

Application Number:			
Property and Contact Name:			
Address:			
Number of Units:			
Section I – Contract Information			
System Owner:	☐ Host Customer		☐ Third-Party Owner
Please select the relevant information for 3rd party owned systems:			
☐ Power Purchase Agreement		☐ Lease	
Option to purchase at end of contract:		☐ Yes	☐ No
Other end of contract options:			
Warranty:			
Product Warranty Term (Defects)		____________Years	
Starting Production		____________%	
Yearly Degradation		____________%	
Removal of Defective Equipment		☐ Yes	☐ No
Replacement of Defective Equipment		☐ Yes	☐ No
Section II – System & Installation Information			
Aggregated annual consumption (historical avg.)			
Number of inverters			
Number of photovoltaic panels			
Estimated time for construction			
Section III – Payments and Cost Information			
Upfront Cost		$	
Payment Schedule	☐ One-time	☐ Monthly	☐ Annual

SOMAH

Amount due with each payment	$
Cost to purchase at the end of contract (if applicable)	$

The undersigned declare under penalty of perjury under the laws of the State of California that the information provided on this form is accurate and true.

______________________________________ _________________

Solar Contractor Representative Signature Date

Multiple Bid Waiver

Background: Per the Solar On Multifamily Affordable Housing (SOMAH) Handbook, Section 4, Application Process for SOMAH Projects, and Section 4.4 Multiple Bid Requirement, projects that enter the program in Track A and receive upfront Technical Assistance are required to solicit multiple bids for their solar PV project. Projects that enter the program in Track B and do not receive upfront Technical Assistance may opt to solicit multiple bids, but are not required to do so.

By signing this affidavit, [Host Customer Name], with respect to the solar electric system project ("System") at[Project Site Address], which is funded by the Program Administrator for the Solar on Multifamily Affordable Housing Program (SOMAH) under Application Number [XXX-SOMAH-XXXXX], certifies and declares under penalty of perjury under the laws of the State of California that each of the statements in the paragraphs below are complete, true and correct.

1) I have freely chosen to forego the bidding process.
2) I am aware that I have the option to solicit multiple bids from more than one contractor.
3) I am aware that the SOMAH program has resources available to assist in soliciting bids from eligible contractors.

By signing this Affidavit, I, [Host Customer Name], also declare under penalty of perjury, under the laws of the State of California, that all of the foregoing statements are true and correct.

Host Customer

Signature: [Host Customer Signature]

[Host Customer Name]

[Date]

V1

PPR

Solar On Multifamily Affordable Housing

Progress Payment Request Form

Form Version	PPR-V1-2021
Application Number	XXX-SOMAH-#####
Preparation Date	00/00/0000

SOMAH

The SOMAH Program offers a Progress Payment Pathway (PPP) request option to receive 60% of the total reserved incentive once the system is installed and is mechanically complete, in advance of receiving permission to operate from the Utility. This option enables partial recoupment of the system and installation costs before the completion of the Utility interconnection process and the SOMAH application process.

An Applicant may submit the Progress Payment Pathway Request package after the SOMAH PA has issued the Proof of Project Milestone Approval, but no later than four months in advance of the Incentive Claim Milestone deadline. The Request Package must include:

1. A completed Progress Payment Request Form
2. A signed affidavit ensuring tenant education has been completed

The designated Payee in PowerClerk for the progress payment will carry over to the Incentive Claim Milestone as the payee for the final incentive payment as well. See SOMAH Handbook Section 4.6.1, Progress Payment Request Option for details.

Summary of Progress Payment Request
(auto-filled from PowerClerk)

PROPERTY & PARTICIPANTS	
SOMAH Application Number	XXX-SOMAH-#####
Property Name	[Property Name]
Host Customer Name	[Host Customer Name]
Host Customer Company	[Host Customer Company]
System Owner Name	[System Owner Name]
System Owner Company	[System Owner Company]
EQUIPMENT & SYSTEM INFORMATION	
CEC-AC kW	0 kW CEC-AC
Design Factor	0%
CSI-AC kW	0 kW CSI-AC
Summary of Arrays	[Inverter Summary] [Array Summary]

INCENTIVE CALCULATION & PAYEE INFORMATION	
Total Reserved Incentive	$0.00
Progress Payment Amount	$0.00
Payee Name	[Payee Name]
Payee Company	[Payee Company]
Method of Payment	[Electronic Payment or Check]
If electronic:	Last 4 digits of account number: 0000 Last 4 digits of routing number: 0000

The future final incentive payment will be calculated after the final SOMAH inspection and the Incentive Claim Milestone approval and will equate to the total reserved incentive minus the progress payment and any further reconciliations made to the incentivized system post SOMAH inspection.

Attestation and Signatures

By signing this Progress Payment Request Form, the signatories below attest under penalty of perjury that they understand and agree to the following:

- The system is installed at the SOMAH project site as portrayed in the Progress Payment Request Package and all information listed on this form is true and accurate.
- The 18-month SOMAH reservation period remains the same for all SOMAH projects regardless of whether a progress payment was disbursed. Permission to Operate must be issued by the relevant Utility and an Incentive Claim Package must be submitted to the SOMAH PA by the Incentive Claim Milestone deadline.
- If the SOMAH application is cancelled or withdrawn due to reasons including, but not limited to: not meeting all program requirements or if the Incentive Claim Milestone Package is not submitted by the Incentive Claim Milestone deadline, the Payee shall return all SOMAH progress payment incentive funds within 30 days after the application has been cancelled or withdrawn (see SOMAH Handbook Section 4.7.4, Grounds for Incentive Payment Clawback or Reduction, for details).

SIGNATURES			
Host Customer	System Owner	Contractor	Payee
[Host Customer Name] [Host Customer Company] Signature Date	[System Owner Name] [System Owner Company] Signature Date	[Contractor Name] [Contractor Company Name] Signature Date	[Payee Name] [Payee Company Name] Signature Date

M. RESERVATION REQUEST FORM

RRF	Solar On Multifamily Affordable Housing **Reservation Request Form**		SOMAH
	Form Version	RRF-V1-2019	
	Preparation Date	[Date]	

HOST CUSTOMER	
Contact Name	[Host Customer Name]
Company	[Host Customer Company]
Mailing Address	[Host Customer Address]
City, State, Zip Code	[Host Customer City, State, Zip]
Phone Number	[Host Customer Phone Number]
Email	[Host Customer Email]
SYSTEM OWNER	
Contact Name	[System Owner Name]
Company	[System Owner Company]
Mailing Address	[System Owner Address]
City, State, Zip Code	[System Owner City, State, Zip]
Phone Number	[System Owner Phone Number]
Email	[System Owner Email]
APPLICANT	
Contact Name	[Applicant Name]
Company	[Applicant Company]
Mailing Address	[Applicant Address]
City, State, Zip Code	[Applicant City, State, Zip]
Phone Number	[Applicant Phone Number]
Email	[Applicant Email]
SOLAR CONTRACTOR	
Contact Name	[Solar Contractor Name]
Company	[Solar Contractor Company]
Mailing Address	[Solar Contractor Address]
City, State, Zip Code	[Solar Contractor City, State, Zip]
Phone Number	[Solar Contractor Phone Number]
Email	[Solar Contractor Email]
CSLB License Number	[Solar Contractor CSLB License Number]
PROJECT SITE INFORMATION	
Site Address	[Project Site Address]
City, State, Zip Code	[Project Site City, State, Zip]

EQUIPMENT & SYSTEM INFORMATION	
System Purchase Type	[Host Customer Owned/PPA/Solar Lease]
System Uses All Smart Inverters	[Yes/No]
PV System Specification	[PV System Equipment, Tilt, Azimuth, Shading]

V1

Associated Costs					
Photovoltaic Modules	Inverter(s)	Carport Materials and Installation	PMRS	Permitting Fees	Balance of System
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total Project Cost:					**$0.00**

PROJECT INCENTIVE CALCULATION		
	Tenant Area	**Common Area**
Incentive Level	$0.00	$0.00
Load Allocation	0%	0%
CEC-AC System Rating	0 kW CEC-AC	
CSI-AC System Rating	0 kW CSI-AC	
PV System Est. Annual Production	0 kWh	
Incentive Calculation Details *System Design Factor	[Incentive Calculation Details] = $0.00	
Reserved Incentive Amount	$0.00	

APPLICATION DEPOSIT (Applicable for systems ≥ 10 kW)
Application Deposit Amount: $0.00

By execution of the Completed Reservation Request Form (RRF), the Host Customer, System Owner, or any other party to the RRF agree to include the language in Section B-7, Indemnification of the SOMAH Program Handbook, in any agreement for the installation of a solar photovoltaic system that receives funding from the SOMAH Program.

SIGNATURES		
Host Customer	**Host Customer**	**Host Customer**
X [Host Customer Signature]	X [Host Customer Signature]	X [Host Customer Signature]
[Host Customer Name] [Host Customer Company]	[Host Customer Name] [Host Customer Company]	[Host Customer Name] [Host Customer Company]

V1

Pacific Power & Light Company	Original	Cal.P.U.C.Sheet No.	4265-E
Portland, Oregon	Canceling	Cal.P.U.C.Sheet No.	

(N)

Virtual Net Energy Metering
Solar Generation Credit Allocation Request Form

Owner/ Operator Information (as it appears on your monthly Pacific Power statement):	
Customer or Business Name	
Street Address	
City, State, ZIP	
Phone	
Email	
Name of Individual Completing the Form	

Credit Allocation Request Information

I/we request that all energy credits, available as a result of the application of the [illegible] and [illegible]s of Schedule NEMVS-139, be applied in the following percentages to the Qua[illegible] Customers r[illegible]le for bills for the locations and the common use area(s) of the Residential Comple[illegible] meeting the [illegible]ms set forth in Schedule NEMVS-139. I/we certify that an amount less th[illegible] will [illegible]locat[illegible] common area meters in accordance with the rules adopted by the California P[illegible] U[illegible]es Co[illegible] in D.17-12-022.

Common Use / Tenant Percentage Split

__________ + __________ = 100%

Common Area Tenants

Generating Meter: (meter physic[illegible]att[illegible]e generation facility)		
Meter Number	Account Add[illegible]s list[illegible] your Billing Statement	Annual Anticipated Generation (kWh)

Common [illegible]a Meter(s):				
Account Name	Num[illegible]	[illegible]ccount Address as listed on your Billing Statement	Annual kWh Load	Allocation Percentage %
#1				
#2				
#3				
#4				

(N)

(Continued)

Advice Letter No. 561-E	Issued by Etta Lockey (Name)	Date Filed March 14, 2018
Decision No.	VP, Regulation (Title)	Effective
		Resolution No.

TF6 SGCA-1.NEW

(N)

Virtual Net Energy Metering
Solar Generation Credit Allocation Request Form
(Continued)

Tenant Area Meter(s):				
Account Name	Meter Number	Account Address as listed on your Billing Statement	Annual kWh Load	Allocation Percentage %
#1				
#2				
#3				
#4				
#5				
#6				
#7				

Please attach additional sheets with aggregated meter information, if necessary.

Attached is/are_____ (number of sheets) sheets extending the above [illegible] to more Qua[illegible]ed Customers.

The total annual output in kWh of the Renewable Elect[illegible] Gen[illegible]ing Fa[illegible]ay be sized to offset part or all of the electrical requirements of the meters in th[illegible]regati[illegible] arrangement, but may not be sized to exceed those requirements.

Pacific Power reserves the right to request a pa[illegible] to con[illegible]hat participating accounts conform with the definition of Residential Complex included i[illegible]che[illegible] NEM[illegible]S-139.

I/We represent that the forgoing is [illegible]e a[illegible]ation of the NEMVS-139 credits for this Residential Complex, and we understand that the [illegible]rcen[illegible] take effect on the first regularly scheduled monthly read date that is at least 30 days follow[illegible]ceipt o[illegible] form by the Utility. Moreover, I understand that this allocation and subse[illegible]allocation[illegible]ll remain in effect for a minimum of twelve months.

Owner/ Opera[illegible] Signat[illegible]	
Signature	
Print Name	
Date	

Please return this form to[illegible]

Pacific Power
Attn: Customer Generation
825 NE Multnomah, Suite 600
Portland, OR 97232

(N)

SOUTHERN CALIFORNIA EDISON
An EDISON INTERNATIONAL® Company

Virtual Net Energy Metering For Multi-Tenant and Multi-Meter Properties (NEM-V and NEM-V-ST) Allocation Request Form (N)

A. This Virtual Net Energy Metering For Multi-Tenant and Multi-Meter Properties (NEM-V and NEM-V-ST) Allocation Request Form (Request) is for use in combination with Southern California Edison's (SCE) Schedule NEM-V or its successor, Schedule NEM-V-ST. (N) | (N)

B. This Initial / Subsequent (circle) Request is being completed by:

1. Business or Company Name:

   ____

2. Business or Company Address:

   ____

3. Business or Company Phone Number:

   ____

4. Address of Property subject to Schedule NEM-V or NEM-V-ST (if different than #2): (N)

   ____

5. Name of Individual Filling out this Form:

   ____

6. Email address of Generating Account Owner

   ____

C. Generator Service Account Number

____

____

____

Form 14-910
2/2016 1

SOUTHERN CALIFORNIA EDISON
An EDISON INTERNATIONAL® Company

Virtual Net Energy Metering For Multi-Tenant and Multi-Meter Properties (NEM-V and NEM-V-ST) Allocation Request Form

(N)

Percent Allocated To Each Benefitting Account (Table 1) (T)

Benefitting Account Address with Unit Number	Percent Allocation (total must equal 100 percent)

Attached is/are _____ (number of sheets) sheets extending the lists shown in Table 1 to include more Qualified Customers. Each attached sheet is signed by the undersigned and dated with today's date.

Form 14-910
2/2016

2

SOUTHERN CALIFORNIA EDISON
An EDISON INTERNATIONAL® Company

Virtual Net Energy Metering For Multi-Tenant and Multi-Meter Properties (NEM-V and NEM-V-ST) Allocation Request Form (N)

Designation of Unallocated Credit Due to Unit Vacancy

For unit vacancy

- If there is an Owner/Tenant agreement in place, the unallocated credit will be automatically directed to the owner's account as the customer of record (T)
- If there is no Owner/Tenant agreement in place, the owner may designate in the table below either a Common Area Account or a Benefitting Account (that is not a Common Area Account) to receive the credit

Benefitting Account (Common Area or non-Common Area) Address with Unit Number

(T)

D. I represent that the forgoing is the percentage allocation of the generation credits that this company wants to take effect on the start of the next billing period that is at least 30 days following receipt of this form by SCE. Moreover, I understand that these allocations for the Benefitting Accounts shall remain in effect for a minimum of 12 months. If I request a change in the allocation percentages prior to the end of the 12-month period, I will not be charged for up to one change per Benefitting Account in each 12-month period. Subsequent changes to any account within the 12-month period will be charged at $7.50 per account. (T) (T) (T)

I can receive Qualified Customer information or act on a Qualified Customer's behalf to receive information by completing SCE's Form 14-796: "Authorization To: Receive Customer Information or Act on a Customer's Behalf" (http://www.sce.com/NR/sc3/tm2/PDF/14-796.pdf). (T)

I agree that SCE may from time to time release to the California Energy Commission and/or the California Public Utilities Commission information regarding the Owner/Operator's name, the location of each Generating Facility, their capacities and operating characteristics, and Qualified Customer names and account numbers. (T)

______________________________ (Signature) ______________ (Date)

Please return this form to:

Net Energy Metering
Southern California Edison
P.O. Box 800
Rosemead, CA 91770-9810
Customer.generation@sce.com

A copy of this form, including the signed signature page, may be transmitted to SCE by facsimile or other electronic means, and may be executed by Electronic Signature. A copy of the signature page so transmitted may be used for the purpose of enforcing the terms of this form as though it were an original and it will not be made inadmissible in any legal or regulatory proceeding concerning this form on the basis of the Best Evidence Rule or similar rule of admissibility. (N)

Form 14-910
2/2016 3

SAMPLE

Solar Generation Credit
Allocation Request Form

A. This Solar Generation Credit Allocation Request Form (Request) is for use in combination with San Diego Gas & Electric Company's Schedule VNM-A or Schedule VNM-A-ST or Schedule VNEM-SOMAH.

B. This Initial / Subsequent (circle) Request is being completed by:
1. Business or Company Name:

   ____

2. Business or Company Address:

   ____

3. Business or Company Phone Number:

   ____

4. Name of Individual Filling out this Form:

   ____

C. I request that all credits, available as a result of the application of the rates and terms of Schedule __________ (VNM-A, VNM-A-ST, and VNEM-SOMAH), be applied in the following percentages to the Qualified Customers responsible for bills for the locations and the common use area(s) of the complex, all meeting the terms set forth in Schedule VNM-A or VNM-A-ST or VNEM-SOMAH (as applicable), identified below:

Common Use / Tenant Percentage Split[1]

__________ + ________ = 100%
Common Use   Tenants

[1] For VNM-A and VNM-ST the initial Owner-designated percentage split between common use and tenants will remain in effect for a minimum of five years.

Form 142-02768 (03/18)

Account Type	Meter Number	Service Address Street, **Unit #**, City, Zipcode	Percent Allocation **(Must total 100%)**
Generator Meter			
Common Area Benefitting Meters			
1			
2			
3			
Tenant Benefitting Meters			
4			
5			
6			
7			
8			

Attached is/are _____ (number of sheets) sheets extending the above lists to more Qualified Customers. Each attached sheet is signed by the undersigned and dated with today's date.

D. I represent that the forgoing is the percentage allocation of the solar generation credits that this company wants to take effect on the first regularly scheduled monthly meter read date that is at least 15 days following receipt of this form by the Utility. Moreover, I understand that this allocation and subsequent reallocations shall remain in effect for a minimum of twelve months. I also understand that this company will not receive any feedback from SDG&E regarding how much of the credits were used by each Qualified Customer absent appropriate releases from each customer and a separate agreement with SDG&E.

______________________________ (Signature) ______________ (Date)

Form 142-02768 (03/18)

The Solar on Multifamily Affordable Housing (SOMAH) program provides financial incentives for installing photovoltaic (PV) energy systems on multifamily affordable housing. The program will deliver clean power and credits on energy bills to hundreds of thousands of California's affordable housing residents. SOMAH's unique, community-based approach ensures long-term, direct economic benefits for low-income households, helps catalyze the market for solar on multifamily housing and creates jobs.

CalSOMAH.org