



SOMAH



APPLICATION GUIDE



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1. About SOMAH

1.1. PROGRAM ELIGIBILITY

Details and information on properties that are eligible to install a solar energy system project and receive incentives from the SOMAH program can be found in the [SOMAH Handbook Section 2.2, General SOMAH Eligibility Guidelines](#). The following are generally used to determine SOMAH Program eligibility for a residential, multifamily low-income rental housing:

- Have at least five units
- Be deed-restricted with at least 10 years remaining
- Satisfy one of the following:
 - a. At least 66% of the property residents must have incomes at or below 80% of the area median income (AMI) **OR**
 - b. Property is located in a Disadvantaged Community (DAC) that scores in the top 25% of census tracts statewide in the [CalEnviroScreen](#) tool including property that is located on tribal land and is federally recognized **OR**
 - c. The property is owned by a California Native American tribe **OR**
 - d. The property is rental housing property that is owned by a public housing authority or public housing agency
- Be an existing housing property or retrofit (with Certificate of Occupancy)
- Have separately metered units
- Be a utility or community choice aggregator (CCA) customer (with VNEM) in the following utility territories:
 - Pacific Gas and Electric (PG&E)
 - Southern California Edison (SCE)
 - San Diego Gas & Electric (SDG&E)
 - PacifiCorp
 - Liberty Utilities

If unsure of a project's eligibility, take advantage of the [Affordability Prescreen Request](#) service by submitting a copy of the deed restriction or regulatory agreement to receive feedback. No formal application is required to use the service. The feedback will culminate in a Notice of Affordability Prescreen Eligibility or Ineligibility. The Notice of Affordability Prescreen Eligibility can be used to streamline future application steps.

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
 - calsomahsdge.powerclerk.com

The image shows a 'Log In' form with the following elements: a title 'Log In', a 'Username:' label above a text input field containing 'example@company.com', a 'Password:' label above an empty text input field, a blue 'Log In' button, and a link 'Forgot Password?' above the text 'Register a new account'. A blue arrow points to the 'Register a new account' text, which is circled in yellow.

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

Register

Note: This page is meant for new users to register for PowerClerk. If you already have a PowerClerk account and would like to register for more programs, please log in and visit the Add Programs page under the Settings menu.

User Information

Email Address: *

Password: * 

Confirm Password: *

First Name: *

Last Name: *

Company (optional):

Roles And Programs

Role: *

I'm not a robot 

[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.

Email Confirmation Required

An account activation email has been sent to **your email** from DoNotReply@powerclerk.com. Please open the email to complete the registration process. If you do not receive a PowerClerk registration email shortly, check your junk mail folder and ensure your spam filter did not block the mail. If you still have not received the mail, contact your administrator.

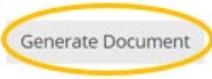
2.2. Generating Documents

A list of all required documents for each milestone is available on our website in the Program Resources – Application Process and [Documents page](#). While some required application documents must be completed independently, a selection of the documents can be generated in PowerClerk.

- a. To generate a document, click the “Generate Document” button. The generated document will automatically download.

Documentation

Step 1: Click “Generate Document” to download a copy of the required form. Some form fields will be pre-filled, but others will need to be manually completed prior to submission.

Incentive Claim Form 

- b. Review the generated document for accuracy. There may be fields that the applicant must manually complete. If any corrections need to be made, they should be corrected in PowerClerk and the document should be regenerated. Reference Application Guide Section 7.2 for more information on Suspended Applications.

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 program funding between Tracks A and B. Track A earmarks the estimated incentive funding to allow for Upfront Technical Assistance. As a result, Track A participants must 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, please contact the SOMAH Program Administrator (SOMAH PA).

Track A Timeline:



Track B Timeline:



By requesting Upfront Technical Assistance, the SOMAH PA can provide the Applicant/Host Customer with information about property eligibility and eligible system size. Once the application has been submitted, incentive funding will be earmarked for 180-days. To reserve these funds, a Reservation Request Package must be submitted prior to the end of the 180-day period.

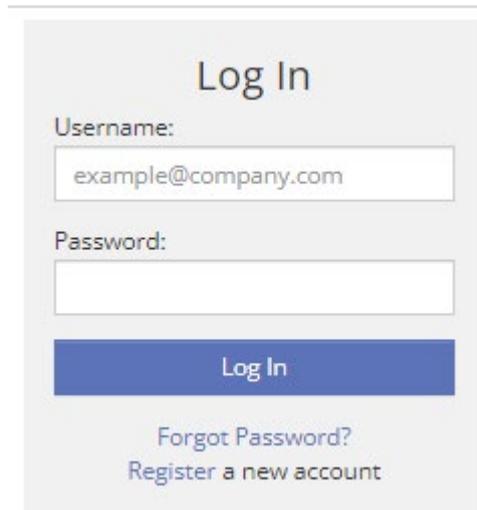
3.2. STANDARD TECHNICAL ASSISTANCE (TA)

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 (Track A) and contractors (Track B) applicants. Standard TA does not have a direct impact on the incentive application timeline. For more information, see [SOMAH Handbook Section 1.3.1.2, Standard Technical Assistance Services](#).

4. Applying for Track A

4.1. UPFRONT TECHNICAL ASSISTANCE

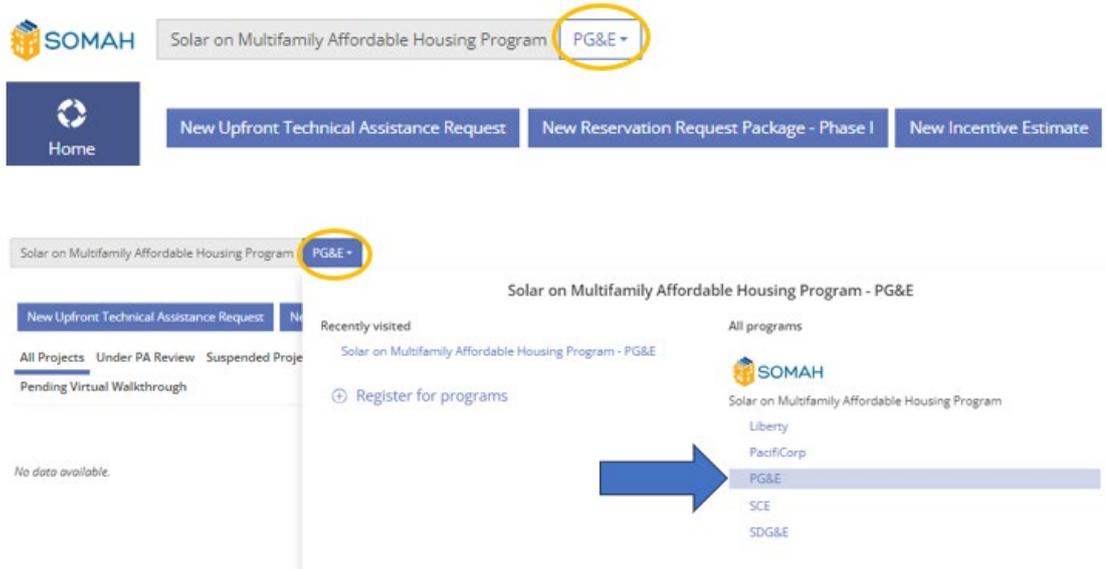
- a. Log in to PowerClerk using the web portal for the appropriate utility (see Application Guide Section 2.1, Creating an Account, if you do not have a username and password).



- 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 drop-down option where the utility name is and select the correct utility from the dropdown menu.

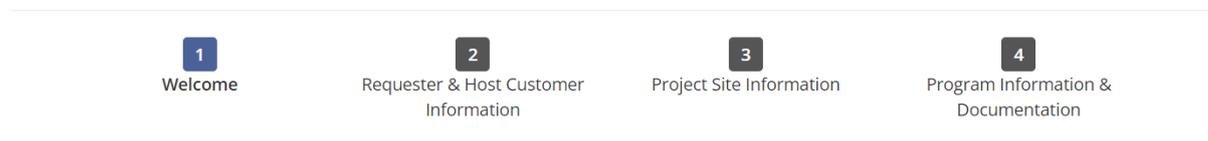


- d. After confirming that the correct utility has been selected, click the “New Upfront Technical Assistance Request” button to proceed to the application form.



- e. There will be a total of four pages that must be completed prior to submitting the application form (Welcome, Requestor & Host Customer Information, Project Site Information, and Program Information & Documentation). As each page is completed, the page number in the form header will turn green.

Technical Assistance Request



Welcome

Thank you for your interest in Upfront Technical Assistance through the SOMAH Program!

- 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 in the Upfront Technical Assistance Interest Form.

Click the Submit button below to complete the Technical Assistance Interest Form.



- 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

Please fix the errors below and try again.

Missing Required Fields:

- Applicant - Name, Company, Address, Phone, Email - Page 2
- Host Customer - Name, Company, Address, Phone, Email - Page 2
- Host Customer Contact Type - Page 2
- Prefer Email or Phone - Page 2
- Was your project a formal referral to the SOMAH program? - Page 2
- Property Name - Page 3
- Project Site Address - Page 3

- 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 SOMAH PA assigned reviewer will send an email requesting the following supporting documentation if it has not been uploaded to PowerClerk already.

- 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.
- 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
- Letter of Authorization to Receive Customer Information or Act on a Customer’s Behalf ([Appendix M in the Handbook](#))
- [List of addresses on site for ESA program referral](#)

All documents listed above are required for Upfront Technical Assistance. Upon approval, interest forms will have incentive funding earmarked in the order they were submitted.

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 “>” button to the left of the application information. To select the project, click the “View/Edit Project” button.

Application Number	Current Status	Current Status Timestamp	Host Customer Company	Property Name	Project Site Address	Incentive Track	Assignee Name	Nearest Due Date	Nearest Deadline
> -SOMAH-	Upfront Technical Assistance Approved					Track A			Deadline for Earmarked Funding

- c. The following page will have application information for the selected project. Each section shown below can be expanded/contracted to show information. Expand the “Available Forms” section by clicking anywhere on the section header.

Unsubmitted
Upfront Technical Assistance
Reservation Request Package
EE Compliance Milestone
Proof of Project Milestone
Progress Payment Pathway
Incentive Claim Package

- > Current Status
- > Project Summary
- > Available Forms
- > Previous Forms
- > Access Grants For This Project
- > Attachments
- > Communications Sent to Megan@blueavenue.org
- > Deadlines

- d. “Reservation Request Package – Phase I” will be listed under “Available Forms.” Select “Begin.”

▼ Available Forms

Form Name	Form Status
Reservation Request Package - Phase I	Begin <small>New Form Became available on 3/21/2024 at 2:13 PM</small>

- e. The Reservation Request Package – Phase I 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.

Reservation Request Package - Phase I
Project Number: -SOMAH-

3
System Owner Information

4
Applicant Information

5
Solar Contractor Information

6
System Information & Incentive Estimation

7
Acknowledgement & Documentation

- f. 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.
- g. Once the application has been submitted, the applicant will receive an email notification, letting them know the Reservation Request Package – Phase I form has

been received. An approval or suspension notice will be sent once the application has been fully reviewed (in order of receipt).

- h. An approval or suspension notice will be sent once the application has been fully reviewed (in order of receipt). After the Reservation Request Package – Phase I form has been reviewed, the SOMAH PA will request electrical usage data from the utility for the property and allow the applicant a chance to right-size their system before final reservation approval in Reservation Request – Phase II. An approval notification will be sent with information regarding the due dates for each of the remaining steps and the reserved incentive amount. The application status automatically updates to “Reservation Request Submitted” upon successful submission.

4.2.1. Required Documentation

Phase I:

- Documentation of Multifamily Low-Income Housing Eligibility (deed restriction)
- [List of Addresses on Site Template](#) (meter numbers are required for SDG&E applications)
- VNEM Load Allocation Form ([Appendix R in the Handbook](#))
- Letter of Authorization to Receive Customer Information or Act on a Customer’s Behalf ([Appendix M in the Handbook](#))
- [Host Customer Data Disclosure Consent Form](#)
- Affidavit Ensuring SOMAH Income Levels for Minimum of 10 Years ([Appendix U in the Handbook](#))

Phase II:

- Reservation Request Form ([Appendix P in the Handbook](#))
- Affidavit Ensuring 100% Tenant Economic Benefit ([Appendix E in the Handbook](#))
- Multiple Bid Waiver ([Appendix N in the Handbook](#))
- Application deposit

4.2.2. Application Deposit

On Page 7 of the Reservation Request Package – Phase II 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. An application deposit will not be required for priority group applications including DAC and tribal properties or projects with a system size less than 10 kW CEC-AC.

Application Deposit

Does this project qualify for a "priority group" that is eligible to waive the application deposit? *

Yes

No

Application Deposit

\$ 2,500.00

Please check this box to acknowledge that you are aware of the required application deposit amount which is to be sent to the Center for Sustainable Energy in the form of a check within 30 days to hold this Reservation. The SOMAH PA will only accept application deposit in the form of a check. Cash, credit cards, money orders, promissory notes, etc. will not be accepted. Application deposits will be linked to reservation numbers, not to the Project Site; therefore, the Project must be completed under the same reservation number as the one linked to the application deposit. *

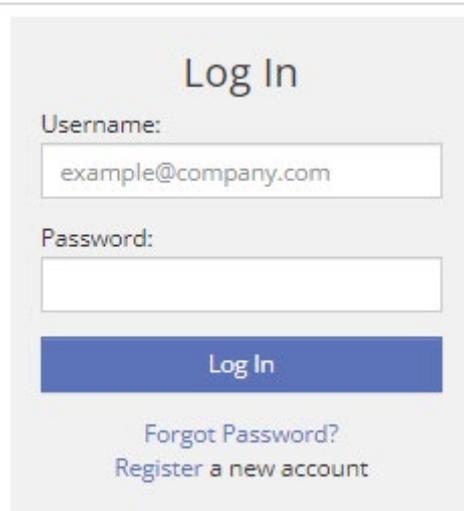
If the Application Deposit has not been submitted by the time the Reservation Request is reviewed, an invoice will be sent to the Applicant requesting the Application Deposit within 30 days.

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.



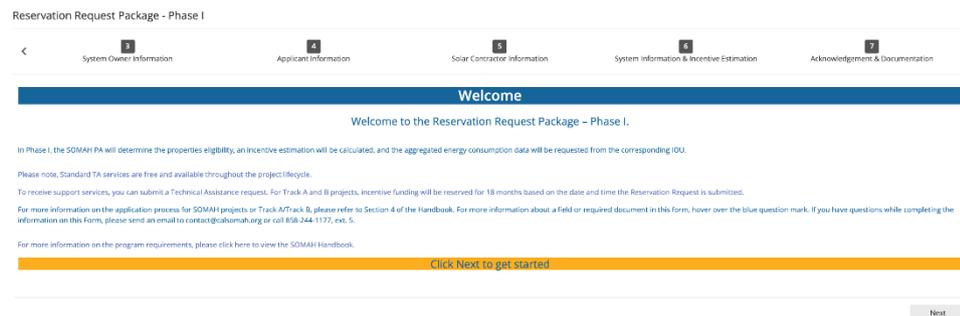
- c. If the utility shown does not correspond with the servicing utility for the proposed project site, click the drop-down option where the utility name is and select the correct utility from the dropdown menu.



- d. After confirming that the correct utility has been selected, click the “New Reservation Request Package – Phase I” button and proceed to the application form.



- e. The Reservation Request – Phase I Form will have seven pages that must be completed before 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.

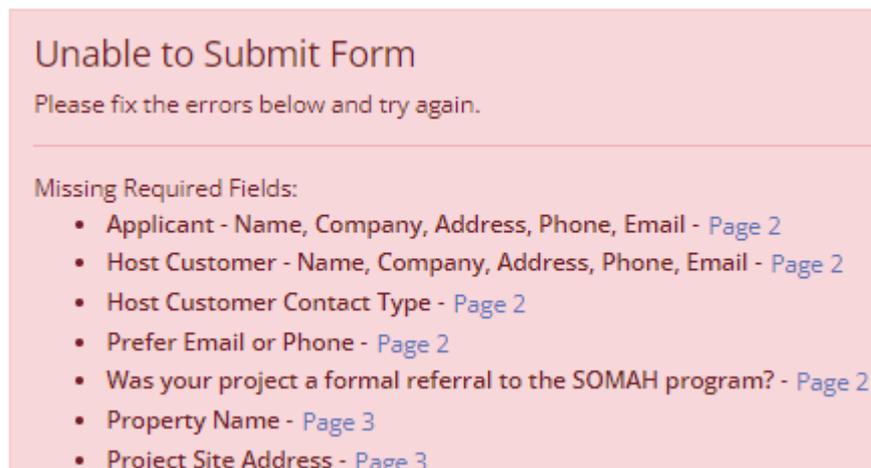


- g. To submit the application, click the blue “Submit” button at the bottom of the “Acknowledgement & Documentation” page.

Please note, SOMAH applicants applying for systems 10 kW or larger are required to submit an application deposit at the end of Phase II. The amount of the deposit is based on the system size. Application deposits are not required for priority group applications. At this time, priority groups include properties located in DAC's and tribal properties.



- 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 – Phase I form has been reviewed, the SOMAH PA will request electrical usage data from the utility for the property and allow the applicant a chance to right-size their system before final reservation approval in Reservation Request – Phase II. An approval notification will be sent with information regarding the due dates for each of the remaining steps and the reserved incentive amount. The application status automatically updates to “Reservation Request Submitted” upon successful submission.

5.1.1. Required Documentation

Phase I:

- Documentation of Multifamily Low-Income Housing Eligibility (deed restriction)
- [List of Addresses on Site Template](#) (meter numbers are required for SDG&E applications)
- VNEM Load Allocation Form ([Appendix R in the Handbook](#))
- Letter of Authorization to Receive Customer Information or Act on a Customer’s Behalf ([Appendix M in the Handbook](#))
- [Host Customer Data Disclosure Consent Form](#)
- Affidavit Ensuring SOMAH Income Levels for Minimum of 10 Years ([Appendix U in the Handbook](#))

Phase II:

- Reservation Request Form ([Appendix P in the Handbook](#))
- Affidavit Ensuring 100% Tenant Economic Benefit ([Appendix E in the Handbook](#))
- Multiple Bid Waiver ([Appendix N in the Handbook](#))
- Application deposit

5.1.2. Application Deposit

On Page 7 of the Reservation Request – Phase II 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. An application deposit will not be required for priority group applications including DAC and tribal properties or projects with a system size less than 10 kW CEC-AC.

Application Deposit

Does this project qualify for a "priority group" that is eligible to waive the application deposit? *

Yes

No

Application Deposit *

\$ 2,500.00

Please check this box to acknowledge that you are aware of the required application deposit amount which is to be sent to the Center for Sustainable Energy in the form of a check within 30 days to hold this Reservation. The SOMAH PA will only accept application deposit in the form of a check. Cash, credit cards, money orders, promissory notes, etc. will not be accepted. Application deposits will be linked to reservation numbers, not to the Project Site; therefore, the Project must be completed under the same reservation number as the one linked to the application deposit. *

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 “>” 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 six 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 applicable – Pathway 1)
- [Solar Sizing Tool](#). See Section 2.4.4, [Solar Sizing Tool of the SOMAH Handbook](#) for more information.
- Solar Sizing Tool Signature Page (generated from Solar Sizing Tool spreadsheet)
- Documentation of load increase (if applicable)

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 “>” 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 seven 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) **OR** Copy of Alternative System Ownership Agreement (third-party owned systems only)
- Certification of Compliance with SOMAH Performance Requirements for Third-Party Owned Systems ([Appendix H in the Handbook](#) for third-party owned systems only)

- VNEM Allocation Form ([Appendix R in the Handbook](#), 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 an 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 two months away from the Incentive Claim Milestone due date when the request is submitted. After completing the form and providing the request documentation, the SOMAH inspector (assisted by the onsite contact) will complete a virtual walkthrough to confirm the system location and the installation is mechanically complete. Mechanical completion, for the progress payment, is defined as the point at which all solar PV equipment has been installed, including the net generation output meter (NGOM) socket, and the system wiring has been completed.

6.3.2. Required Documentation

- Progress Payment Request Form ([Appendix T in the Handbook](#))
- Affidavit Ensuring Tenant Education ([Appendix F in the Handbook](#))
- Supporting documentation for virtual walkthrough (if applicable)
- [Electronic payment setup form \(if applicable\)](#)

6.4. INCENTIVE CLAIM PACKAGE

- 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.
- Expand the application by selecting the “>” button to the left of the application information. To select the project, click the “View/Edit Project” button.
- 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.”
- The Incentive Claim Form will have eleven pages that must be completed before submitting.
- Page 11 contains documents that must be uploaded. Select the files from your computer by clicking the “Browse” button and then finding the appropriate file to submit.
- To submit the application, click the blue “Submit” button at the bottom of the “Final Questions & 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.
- 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 I in the Handbook](#))
- Final VNEM Load Allocation Form ([Appendix R in the Handbook](#))
- Affidavit Ensuring Tenant Education ([Appendix F in the Handbook](#))
- Job Training Affidavit ([Appendix K in the Handbook](#))

- Documentation of load increase (if applicable)
- [Electronic payment setup forms \(if applicable\)](#)

6.4.2. Final Inspection

After the information and documentation included in the Incentive Claim Package has been approved, a final inspection will be required. The SOMAH PA will contact the Host Customer to schedule the inspection. It is recommended, but not required, for the Contractor to 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, an infraction, or failure. For detailed information, see [SOMAH Handbook Section 4.8, Final Inspections](#).

6.4.3. Payment and Deposit Return

Upon final approval of the Incentive Claim Package and a completed final inspection, the SOMAH PA will issue the incentive payment in approximately 45 days. Payment will be made to the designated Payee, which may be the Host Customer or a third party, as indicated on the Incentive Claim Form. Payment will be mailed to the address or issued via electronic payment to the recipient provided.

Upon verification of the completed project and SOMAH incentive payment, the Application Deposit will be returned in full to the deposit payer, unless the SOMAH PA receives a written request from the deposit payer or Host Customer to return the Application Deposit to a third party. See Section 4.4.2.5, 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 the required corrections, or the application may be canceled.**

- To resubmit information for a suspended application, log on to PowerClerk and find the relevant application.
- Click the “Edit” button to enter the form that requires corrections.



- 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 the Reservation Expiration Extension Request Form (example of what will be asked is located in [Appendix Q of the Handbook](#)) with any necessary documentation to PowerClerk. To do so, log into PowerClerk, click on your project, scroll down to available forms, and click “Reservation Expiration Extension Request Form”. This form is only available at Proof of Project Milestone Approved until Incentive Claim is submitted.

Available Forms	
Form Name	Form Status
Incentive Claim Package	<input type="button" value="Begin"/> New Form Became available on 4/2/2024 at 11:07 AM
Reservation Expiration Extension Request	<input type="button" value="Begin"/> New Form Became available on 4/2/2024 at 11:07 AM

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.](#)