



Document Checklist

Each step in the SOMAH application process will require the applicant to submit an online form in PowerClerk.

Track A

Submit **Upfront Technical Assistance (TA) Request**

After the initial Upfront TA Request has been submitted, the following documents will be required

- Documentation of Multifamily Low-Income Housing Eligibility
- Letter of Authorization to Receive Customer Information or Act on a Customer's Behalf
- List of Tenant Addresses (and meter numbers for SDG&E applicants)

Track A & B

STEP 1

Submit **Reservation Request Package**

Required documentation

Phase I

- Documentation of Multifamily Low-Income Housing Eligibility¹
- Letter of Authorization to Receive Customer Information or Act on a Customer's Behalf
- List of Tenant Addresses (and meter numbers for SDG&E applicants)
- VNEM Load Allocation Form
- Host Customer Data Disclosure Consent Form

Phase II

- Reservation Request Form
- Affidavit Ensuring 100% Economic Tenant Benefit
- Multiple Bids or Multiple Bid Waiver
- Application Deposit

| kW ≥ | kW < | Deposit |
|------|-------|----------|
| 10 | 50 | \$1,250 |
| 50 | 100 | \$2,500 |
| 100 | 250 | \$5,000 |
| 250 | 500 | \$10,000 |
| 500 | 1,000 | \$20,000 |

¹Track A applicants are not required to resubmit the Documentation of Multifamily Low-Income Housing Eligibility, Letter of Authorization, and List of Tenant Addresses during the Reservation Request Package. The rest of the documentations are still required.

STEP 2

Submit **Energy Efficiency Compliance Milestone**

Required documentation

- One of the following
 - Pathway 1:** documentation of an on-site whole-building walkthrough energy audit of ASHRAE Level I or higher within the past three years
 - Pathway 2:** proof of enrollment in a utility, regional energy network (REN), community choice aggregation (CCA) or federally provided whole-building multifamily energy efficiency program, documentation of a recent California Tax Credit Allocation Committee (TCAC) rehabilitation, or documentation that the property was completely constructed under a recent version of Title 24.
- Solar Sizing Tool documents
 - Excel workbook
 - PDF signature page

STEP 3

Submit **Proof of Project Milestone**

Required documentation

- One of the following
 - Copy of executed contract for system purchase and installation (host customer owned systems only)
 - Copy of alternative system ownership agreement (third-party owned systems)
- Certification of Compliance with SOMAH Performance Requirements for Third-Party Owned Systems (third-party owned systems only)
- Documentation of VNEM Load Allocation (if changed from Reservation Request step)

STEP 4

Submit **Progress Payment Pathway (optional)**

Required documentation

- Progress Payment Request Form
- Tenant Education Affidavit

STEP 5

Submit **Incentive Claim Package**

Required documentation

- Incentive Claim Form
- Job Training Affidavit
- Final VNEM Allocation Form filed with utility
- Tenant Education Affidavit
- Documentation of Load Increase (if applicable)
- Electronic Payment Setup Form (if applicable)