



## 2023 Revised Incentive Checklist

Per California Public Utilities Commission (CPUC) Decision (D.) 23-03-007, issued March 21, 2023, the annual incentive-stepdown methodology has been removed from the SOMAH Program with revised incentive levels available to existing applications that were submitted prior to March 21, 2023, and have not yet submitted their Incentive Claim Milestone documentation. The availability of the revised incentive levels for applications submitted before March 21, 2023, will expire on December 31, 2023. The checklist below provides instructions for property owners and Applicants to request the 2023 Revised Incentive Level. Additional information is included in the SOMAH Program Handbook Section 3.6, Request for 2023 Revised Incentive.

Please note: Any application submitted on or after March 21, 2023, will be allocated the 2023 revised incentive level. The terms property owner and Host Customer may be used interchangeably. The Host Customer refers to the property owner contact listed in PowerClerk for the SOMAH application. The term Applicant refers to the contact that manages the SOMAH application, typically the contractor.

### Part 1: Property Owner (Host Customer)

1. Opt-in with a request for the 2023 revised incentive by completing the VersaForm through the direct email link sent to property owners by the SOMAH PA by December 31, 2023. See SOMAH Program Handbook 7, Appendix X for an outline of the VersaForm contents.
  - The direct email link(s) will be issued to all property owners with eligible applications upon approval of SOMAH Program Handbook 7.
  - Property owners do not need a PowerClerk account to complete the VersaForm request.
  - The SOMAH PA can also re-send the direct email link upon request, as needed. Please email [contact@calsomah.org](mailto:contact@calsomah.org) for assistance.
2. The SOMAH PA will send a confirmation email to the Host Customer (property owner), System Owner, Applicant, and Contractor with a summary of the updated incentive. This email confirmation is a **tentative** approval, conditional on the SOMAH Applicant submitting the proper supporting documentation at the next application milestone. See the Supporting Documentation Required table below.
3. The property owner connects with the SOMAH Applicant to confirm supporting documentation is in place to ensure final eligibility to claim the revised incentive level.

### Part 2: Applicant

1. Applicants must submit supporting documentation to verify that the revised incentive enables the project to stay in the pipeline by improving the economic viability of the project and/or increasing tenant economic benefit for improved terms for the property owner. The revised incentive level is contingent on submission of the supporting documentation at the next SOMAH application milestone after the property owner's VersaForm request.



### Supporting Documentation Required

Determine the required documentation\* by choosing the column for applicable system ownership and row for the application step.

Host Customer Owned System	Third-Party Owned System
<p><b>Application Step:</b> Proof of Project Milestone Approval received</p> <p><b>Requirement:</b> At Incentive Claim, submit a contract amendment for the solar purchase agreement identifying the increased incentive applied, outlining the decrease of cost for the SOMAH system to the property owner and/or increased tenant economic benefit for overall improved terms for the property owner.</p>	<p><b>Application Step:</b> Proof of Project Milestone Approval received</p> <p><b>Requirement:</b> At Incentive Claim, submit a contract amendment for the Third-Party ownership agreement (lease, SSA, PPA) showing decreased rates with the increased incentive applied, outlining the decrease of cost for the SOMAH system to the property owner and/or increased tenant economic benefit for overall improved terms for the property owner. Corresponding contract terms in PowerClerk should be updated to match the revised agreement.</p>
<b>OR</b>	
<p><b>Application Step:</b> Pre-Proof of Project Milestone approval</p> <p><b>Requirement:</b> At the next application milestone, Energy Efficiency Compliance Milestone or Proof of Project Milestone, submit a signed memo identifying the increased incentive applied, outlining the decrease of cost for the SOMAH system to the property owner and/or increased tenant economic benefit for overall improved terms for the property owner. This memo will be cross-referenced with the solar contract once submitted.</p>	<p><b>Application Step:</b> Pre-Proof of Project Milestone approval</p> <p><b>Requirement:</b> At the next application milestone, Energy Efficiency Compliance Milestone or Proof of Project Milestone, submit a signed memo outlining decreased rates with the increased incentive applied, outlining the decrease of cost for the SOMAH system to the property owner and/or increased tenant economic benefit for overall improved terms for the property owner. This memo will be cross referenced with the Third-Party Ownership agreement once submitted.</p>

\*The documentation will undergo the standard review and approval and/or suspension process like all other application documents as described in the SOMAH Program Handbook.