



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
- Cover Sheet for Multifamily Low-Income Housing Documentation
- Letter of Authorization to Receive Customer Information or Act on a Customer's Behalf
 - This LOA should include all common area service account numbers on site
- A list including all
 - Tenant addresses and meter numbers (tenant meter numbers are only required for projects in the SDG&E territory)
 - Common area addresses, service account numbers and meter numbers

Track A & B

STEP 1

Submit **Reservation Request Package**

Required documentation

Track B

- Documentation of Multifamily Low-Income Housing Eligibility
- Cover Sheet for Multifamily Low-Income Housing Documentation
- Letter of Authorization to Receive Customer Information or Act on a Customer's Behalf
 - This LOA should include all common area service account numbers on site

Track A & B

- Completed Reservation Request Form with signatures (applicant, host customer and system owner)
- Comma-separated values (CSV) file listing all tenant addresses on the property to serve as the Energy Savings Assistance Program referral list
- Affidavit Ensuring 100 Percent Economic Tenant Benefit
- One of the following
 - Multiple Bids (required for Track A)
 - Multiple Bid Waiver (accepted for Track B)
- VNEM Load Allocation Form
- Application deposits are required for systems ≥ 10 kW

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

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

- Completed Proof of Project Milestone Checklist with applicant signature
- 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 **Incentive Claim Package**

Required documentation

- Incentive Claim Form with signatures (applicant, host customer and system owner)
- Job Training Affidavit
- Documentation of VNEM Load Allocation (if changed from Proof of Project Milestone step)
- Tenant Education Affidavit
- Documentation of Load Increase (if applicable)