



# 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

## 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

#### 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  $\geq 10$  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
- Solar Sizing Tool

## 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)