



Three-Step Application Process – Forms and Documentation Requirements
 Applies to Non-Residential Projects ≥ 10 kW*

Step 1: Reservation Request
Completed Reservation Request Form and Program Contract with Original Signature
Proof of Electric Utility Service for Site
System Description Worksheet
Electrical System Sizing Documentation (new/expanded load only)
Application Fee (1% of EPBB-calculated CSI Incentive)
Certification of tax-exempt status and AB1407 compliance (Gov't and Nonprofit only)
Documentation of an Energy Efficiency Audit (if you have not met Title 24 or other exemptions)
Printout of EPBB Tool Calculation (www.csi-epbb.com)
Authorization To: Receive Customer Information or Act on a Customer's Behalf (Required for CCSE/SDG&E Service Territory only)
Step 2: Proof of Project Milestone
Completed Proof of Project Milestone Checklist
Copy of executed contract for system purchase and installation (Including Warranty language)
Copy of executed alternative System Ownership agreement (if System Owner is different than Host Customer)
Revised EPBB Calculation Printout (If applicable) (for non-PV a copy of the SOF chart marking the correct data point)
Copy of RFP or solicitation (Government, Non-profit, and Public Entities only)
Step 3: Incentive Form Package
Complete Incentive Claim Form with Original Signatures
Copy of PMRS Contract or PMRS Cost Cap Exemption Documentation
Final Project Cost Breakdown Worksheet
Final Project Cost Affidavit
Final Authorization To: Receive Customer Information or Act on a Customer's Behalf (Required for CCSE/SDG&E Service Territory only and only if Account Number has changed)

***Note:** Applicants can expedite the three step process and opt into the two-step process; however they are still subject to the eligibility requirements based on their system size and type. Please refer to the CSI Handbook, Section 4.2 or contact CCSE for more information.