Non-Residential 2-Step Application Process (<10kW)

Step 1: Reservation Request

1. Complete an Energy Efficiency Audit
    1. SDG&E Online Energy Challenger Audit or other energy efficiency audit
    2. Proof of Title 24 Compliance issued within the past three years is acceptable in place of the energy efficiency audit
2. Determine the CSI system size with the EPBB Calculation Tool
3. Choose a CSI Incentive payment type: Expected Performance Based Buydown (EPBB) or Performance Based Incentive (PBI)
4. Complete and sign the Non-Residential Energy Efficiency Disclosure Form
    1. If applying for an EPBB payment for an existing Commercial building that is over 100,000 sq ft and has a Benchmarking score less than 75, complete and sign the Commercial Energy Efficiency Commitment Agreement
5. Complete and sign the SDG&E Authorization to Receive Customer Information Form
6. Log in to PowerClerk – CSI Application Portal Tool or create an applicant account if necessary
7. Start a "New Incentive Application" and choose the appropriate project type:
    1. CCSE – Small Commercial (<10 kW) and All Residential
    2. CCSE – Large Commercial (>=10 kW)
8. Fill in all required information for the project including:
    1. Host Customer, System Owner, Installer, Seller and Applicant information
    2. Project site
    3. Project components
9. Review the application, print out the completed Reservation Request Form from PowerClerk and have all required parties sign, including the Host Customer, System Owner (if different from Host Customer) and the Applicant (if different from Host Customer)
10. Upload to the "Paperwork Record" tab in PowerClerk the documents required for all applications:
    1. Reservation Request Form
    2. Energy Efficiency Audit Report or Proof of Title 24 Compliance (from within the past three years)
    3. Non-Residential Energy Efficiency Disclosure Form
    4. SDG&E Authorization to Receive Customer Information
    5. Executed Agreement of Solar Energy System Purchase and Installation
11. Upload to the "Paperwork Record" tab in PowerClerk any documents required by specific circumstances for the application:
    1. Executed Alternative System Ownership Agreement (Only if System Owner is different than Host Customer)
    2. Commercial Energy Efficiency Commitment Agreement (Existing Commercial Building over 100,000 sq. ft with Benchmarking less than 75 applying for EPBB)
    3. Proof of at least 15% above Title 24 Standards (PERF-1 Form Certificate signed by a Certified Energy Plans Examiner (CEPE) (New Construction only)
    4. Building Site Plan (New Construction only)
    5. New Construction Building Permit (New Construction only)
    6. Certification of Tax-Exempt Status (Government and Non-Profit System Owners only)
    7. Electrical System Sizing Justification (Proposed system production exceeds past 12-months of energy usage or no energy usage history)

12. Complete a final review of the Reservation Request and submit to the Program Administrator for approval
13. Each application is reviewed in the order that it is received and you will be sent an email notification when your application receives a Confirmed Reservation and the incentive is reserved for your project

Step 2: Incentive Claim

1. Once the system is installed and operational, complete the interconnection and Net Metering (NEM) process, if applicable, with the local utility (SDG&E NEM)
2. If any changes have been made to the system components from the originally submitted reservation, update this information in PowerClerk. Changes might include:
    1. Different solar PV module manufacturer, model or quantity
    2. Different inverter manufacturer, model or quantity
    3. Update to solar PV module PTC rating (Check here to see if it has changed)
    4. Update to inverter efficiency rating (Check here to see if it has changed)
    5. Change in system tilt or azimuth
3. Conduct a field verification of the system and complete the Field Verification Form
4. Sign a contract with an approved Performance Monitoring and Reporting Service (PMRS) for five years if the system is over 10 kW
5. If applying for a PBI incentive, sign a contract with an approved Performance Data Provider (PDP) to report monthly system production information to the Program Administrator for 5 years (required for all systems over 30 kW)
6. Log-in to the PowerClerk – CSI Application Portal Tool and click on "Edit" for the appropriate CSI application
7. Fill in all required information for the project, including:
    1. Any changes to the project components
    2. Payee designation
    3. PMRS and PDP information
8. Review the application, print out the completed Incentive Claim Form from PowerClerk and have all required parties sign, including the Host Customer and System Owner (if different from Host Customer)
9. Upload to the "Paperwork Record" tab in PowerClerk the documents required for all applications:
    1. Incentive Claim Form
    2. Field Verification Form
10. Upload to the "Paperwork Record" tab in PowerClerk any documents required by specific circumstances for the application:
    1. Executed PDP Contract (PBI Incentive only)
    2. Electrical System Sizing Justification (Proposed system production exceeds past 12-months of energy usage or no energy usage history)
11. Complete a final review of the Incentive Claim and submit to the Program Administrator for approval
12. Each application is reviewed in the order that it is received and you will be sent an email notification when your application is approved for payment
13. Within 30 days of notification, the EPBB incentive will be sent to the designated Payee in the form of a check, unless otherwise requested to be paid as an ACH payment (direct deposit)