



**Table 14
Two-Step Application Process – Forms and Documentation Requirements**

Step 1: Reservation Request
Completed Reservation Request Form and Program Contract with Original Signature on CSI Program Contract
Proof of Electric Utility Service for Site
Electrical System Sizing Documentation (new/expanded load for systems greater than 5 kW)
Certification of tax-exempt status and AB1407 compliance (Gov't and Nonprofit only)
Documentation of an Energy Efficiency Audit (or Title 24 documentation or other exemptions)
Printout of EPBB Tool Calculation (www.csi-epbb.com) (for non-PV a copy of the SOF chart marking the correct data point)
Copy of Executed Agreement of Solar System Purchase and Installation, including warranty language
Copy of Executed Alternative System Ownership Agreement (If System Owner is Different from Host Customer)
Step 2: Reservation Confirmation and Claim
Complete Incentive Claim Form with Original Signatures
Copy of Executed PMRS Contract or PMRS Cost Cap Exemption Documentation
Revised EPBB Calculation Printout (if applicable) (for non-PV a copy of the revised SOF chart marking the correct data point)
Final Project Cost Breakdown Worksheet
Final Project Cost Affidavit