

Appendix D Program Process Contractor Checklist

The below steps summarize how to take advantage of Sonoma Clean Power's Advanced Energy Center incentives and On-Bill Financing. If you need any help through this process, e-mail us at advancedenergycenter@sonomacleanpower.org or call us at (707) 324-3223.

Contractors Getting Started

<input type="checkbox"/>	1. Complete a Contractor Application at scpadvancedenergycenter.org/contractor-resources/contractor-application
<input type="checkbox"/>	2. Once received by program staff, sign the Incentive Only Professionals Agreement and return to advancedenergycenter@sonomacleanpower.org
<input type="checkbox"/>	3. Ensure you meet the requirements to be an approved installer for the technologies you are interested in offering your customers [see Appendix B]
	4. Return a Certificate of Liability Insurance naming SCP as additionally insured to: Sonoma Clean Power Authority 431 E Street Santa Rosa, CA 95404
<input type="checkbox"/>	5. If interested in offering 0% On Bill Financing to your customers, become a participating OBF Contractor
<input type="checkbox"/>	a. Sign the OBF Professionals Agreement once received by program staff and return to advancedenergycenter@sonomacleanpower.org
<input type="checkbox"/>	b. Watch the 50-minute webinar recording of the contractor certification course by clicking 'View Webinar' then complete this brief online survey .

Working with an Incentive-Only Customers' Order

<input type="checkbox"/>	1. Obtain the customer order information
	P a. Retrieve email notification for customer's request to obtain a bid which includes customer address, name, contact information, selected product, and order number
	<input type="checkbox"/> b. Alternatively, if referring the customer to the Advanced Energy Center incentive, direct them to SCPAdvancedEnergyCenter.org/products to select the product they want and generate the order
<input type="checkbox"/>	2. If needed, contact the customer to request additional project information or set up site visit as needed to provide a project bid
<input type="checkbox"/>	3. Submit a bid to the customer that meets program requirements [see Appendix E]

<input type="checkbox"/>	4. Upload estimate/bid file to scpadvancedenergycenter.org/forms/contractor-bid-submission along with requested customer and project information
<input type="checkbox"/>	6. If the customer accepts your bid, tell them to email advancedenergycenter@sonomacleanpower.org notifying SCP which bid is selected
<input type="checkbox"/>	7. If the product installed has a vendor discount, follow the guidelines in Appendix B to secure the discount prior to installation
<input type="checkbox"/>	8. Install the product
<input type="checkbox"/>	9. Create an invoice that meets program requirements [see Appendix G]
<input type="checkbox"/>	10. Upload the following final documents to scpadvancedenergycenter.org/contractor-resources/project-completion-form . Note that this can be done by the customer.
<input type="checkbox"/>	Final invoice
<input type="checkbox"/>	Closed permit
<input type="checkbox"/>	Notice of Completion [see Appendix H]
<input type="checkbox"/>	If the project is seeking BayREN Home+ incentives, submit verification documentation through the BayREN Home+ contractor portal separately from this Advanced Energy Center process
<input type="checkbox"/>	Await payment from SCP for incentive(s) and payment from customer for the remaining amount (except BayREN Home+ incentives, these are handled separately through BayREN); SCP payments are estimated to arrive in 2 weeks

Working with an On-Bill Financing Customer

<input type="checkbox"/>	1. Check with the customer that they have completed an OBF Application. If needed, direct them to scpadvancedenergycenter.org/es/forms/customer-on-bill-financing-application .
<input type="checkbox"/>	a. If Application is approved, move to the next step; if denied, follow Incentive-Only process if agreed to by the customer
<input type="checkbox"/>	2. Follow steps 1-6 in the above section (<i>Working with an Incentive-Only Customers' Order</i>)
<input type="checkbox"/>	3. Await email notification that the OBF Participation Agreement is fully executed (signed by both customer and SCP) – <u>this is authorization to begin work</u>
<input type="checkbox"/>	4. If the technology installed has a vendor discount, follow the guidelines in Appendix B to secure the discount prior to installation
<input type="checkbox"/>	5. Install the technology
<input type="checkbox"/>	6. If the installation requires a change from the original scope outlined in the OBF application, submit a change and await approval before continuing work:
<input type="checkbox"/>	a. Submit a revised bid at scpadvancedenergycenter.org/forms/contractor-bid-submission to initiate a change order
<input type="checkbox"/>	b. Team will review change order; if approved Customer receives an amended OBF Exhibit B
<input type="checkbox"/>	7. Create an invoice that meets program requirements [see Appendix G]

☐	8. Upload the final invoice and closed out permit (if applicable) to scpadvancedenergycenter.org/contractor-resources/project-completion-form .
☐	If the project is seeking BayREN Home+ incentives, submit verification documentation through BayREN Home+ contractor portal separately from this Advanced Energy Center process.
☐	9. Await full payment from SCP (except BayREN Home+ incentives, these are handled separately through BayREN); SCP payments are estimated to arrive in 2 weeks
☐	10. Customer's utility bill will include a monthly on-bill charge to repay equipment and installation costs outlined in the executed OBF Participation Agreement. (This may take up to 3 billing cycles to appear). Note that Customer may request SCP to issue the payment for verified deposits or progress payments paid by the Customer to the Contractor and include those costs in the Customer's final loan amount.