

# Advanced Energy Center

Incentives Manual for Professionals



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## Program Overview

Sonoma Clean Power's Advanced Energy Center allows you to be connected directly with over 228,000 customers in Sonoma and Mendocino counties, all while providing your customers with exclusive, pre-negotiated equipment discounts and 0% financing when you decide to become an on-bill financing contractor.

### Customer Incentives

To make the latest low-carbon technologies accessible to all, SCP and our vendor partners are offering incentives on clean energy technologies such as heat pumps, induction cooktops, and smart thermostats. These incentives are available to both residential and commercial customers. See Appendix A for a list of Advanced Energy Center technologies and associated SCP incentives. For contractors to claim these incentives for their customers, contractors MUST:

- Submit a contractor application on the Advanced Energy Center website (see website)
- Sign the Advanced Energy Center Contractor Memorandum of Understanding (MOU)
- Hold an active California State Contractor License and current contractor bond and insurance in accordance with the Contractor MOU
- Be confirmed by the product manufacturer as an installing contractor or complete the required SCP trainings to become a certified installer. See Appendix B for a list of contractor requirements for vendors
- For contractors installing either heat pumps for space heating or heat pump water heaters, be listed as BayREN Home+-certified contractors and meet all requirements for that program (see [bayrenresidential.org/for-contractors](https://bayrenresidential.org/for-contractors))

### On-Bill Financing (OBF)

Contractors may also choose to participate in SCP's On-Bill Financing (OBF) program. This program provides residential customers a 0% interest loan for up to \$10,000 on select technologies. On-bill financing is available to residential customers of Sonoma Clean Power only. The loan amount is repaid on the customer's bill over time.

For contractors to offer on-bill financing to their customers, contractors MUST:

- Submit a contractor application on the Advanced Energy Center website
- Sign the Advanced Energy Center Contractor Memorandum of Understanding (MOU)
- Sign the Advanced Energy Center On-Bill Financing Memorandum of Understanding (MOU)
- Hold an active California State Contractor License and current contractor bond and insurance in accordance with the Contractor MOU
- Be confirmed by the product manufacturer as an installing contractor or complete the required SCP trainings to become a certified installer. See Appendix B for a list of contractor requirements for vendors
- Complete a mandatory Sonoma Clean Power training on the On-Bill Financing program
- For contractors installing either heat pumps for space heating or heat pump water heaters, be listed as BayREN Home+-certified contractors and meet all requirements for that program

## Contractor Process for Customer Incentives & Financing

The below section outlines the process for working with customers to complete projects through the Advanced Energy Center. A printable Contractor Checklist is provided in Appendix D.

### Being a Participating Contractor

To access the Advanced Energy Center incentives and receive bid requests from SCP customers, a contractor must submit a Contractor Application, return signed MOU(s), submit a Certificate of Liability naming SCP as additionally insured, and verify the email address used to receive customer leads.

Once a contractor's account has been established, they are responsible for responding to customer leads by contacting the customer directly then submitting a bid to the website.

### Providing Bids to Customer

Contractors will receive an e-mail notification from 'Sonoma Clean Power in Chatter' when a customer has selected a product the contractor is eligible to install. For certain technologies such as mini-split heat pumps, nighttime ventilation, and heat recovery ventilators, the required product size/type may be unknown at the time of purchase. For these technologies, customers will be able to select a generic, manufacturer-specific placeholder (e.g., Fujitsu Mini Split Heat Pump) that includes the possible incentive ranges (\$500-\$1,500). Contractors will identify the appropriate product and incorporate their recommendations in the bid.

Prior to submitting a bid, a contractor may work with the customer to coordinate a site visit as necessary. After the site visit, a contractor will upload their bid to the Advanced Energy Center website (see [scpadvancedenergycenter.org/forms/contractor-bid-submission](http://scpadvancedenergycenter.org/forms/contractor-bid-submission)). Contractors may use their own bid template, but bids must include the same information as the Bid Template included in Appendix E. Contractors are welcome to use Appendix E to submit bids as well. Bids must represent the full cost of work to be included in the project, including all SCP, vendor, and/or BayREN incentives, materials, permits, and labor. Once a bid is uploaded, the customer can review bids via the Advanced Energy Center website and select the contractor that they would like to proceed with. A contractor will be notified via e-mail if they are selected for a project.

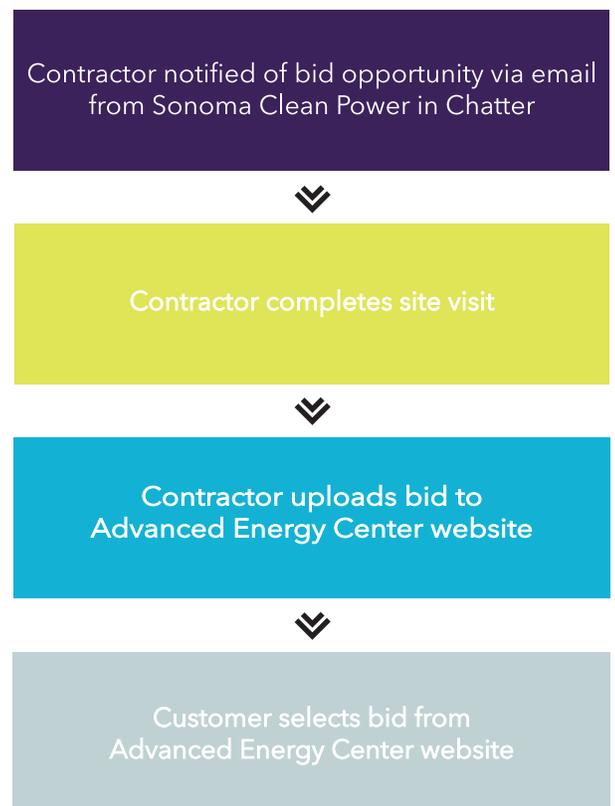


Fig 1. Contractor Process for Bids

## Changes to Bids

Customers will work directly with their contractor throughout their project's development.

For incentive-only projects, if a change to the project scope impacts the incentive amount, the customer must notify the Advanced Energy Center team cc'ing their contractor, and the contractor must upload a new bid to the Advanced Energy Center website.

For projects receiving On-Bill Financing, any changes to the work scope and/or pricing will require a change order and an amendment to the On-Bill Financing Agreement in addition to the customer notifying the Advanced Energy Center team and the contractor submitting a new bid (See section below).

Contractors can contact the Advanced Energy Center team via the messaging feature in the Advanced Energy Center website (see [scpadvancedenergycenter.org/contact](https://scpadvancedenergycenter.org/contact)) or via e-mail at [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org).

## [Financing Projects Only] On-Bill Financing Agreement

Projects participating in On-Bill Financing must execute an On-Bill Financing Agreement before installation. Once a customer has selected a contractor bid, Advanced Energy Center staff will populate the On-Bill Financing Agreement and send the agreement to the customer for review. This agreement will include an estimate of the monthly on-bill charge based on the approved technologies, the contractor's bid for labor and materials, and the customer's repayment terms. An executed agreement signals the contractor can begin installation once the Agreement has been signed by the customer and Advanced Energy Center staff. It is the responsibility of the customer and contractor to enter a separate contract to complete a project in accordance with the contractor's requirements.

Any changes to the work scope and/or pricing that occur after the Agreement has been executed will require the contract to be approved and updated.

## Product Purchasing, Installation, and Project Timeline

Each project will be assigned a unique order number. When a customer selects a contractor's bid, that order number will be claimed for that contractor. When purchasing a product, the contractor must provide this order number to

the vendor to receive the SCP and manufacturer incentives. To verify that an order is legitimate and not expired, contractors can contact the Advanced Energy Center team via the messaging feature in the Advanced Energy Center website or via e-mail at [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org).

Projects are required to be completed within 120-days of the customer accepting the bid. Projects are considered complete when close-out documentation is uploaded. If an extension to the 120-day deadline is required, contractors can contact the Advanced Energy Center team through the messaging feature in the Advanced Energy Center website to request an extension. If 120-days elapse without a contractor uploading project close out documentation or requesting an extension, all incentives and On-Bill Financing Agreement(s) tied to that project will expire and new incentives, order numbers, and On-Bill Financing Agreement(s) will need to be issued.

## Project Close Out

The installing contractor must upload the project close out documents to the Advanced Energy Center website within 120-days of the customer selecting a bid (see [scpadvancedenergycenter.org/contractor-resources/project-completion-form](https://scpadvancedenergycenter.org/contractor-resources/project-completion-form)). Contractors must upload the following documents as a part of project close out:

- Proof of permit closure (as required by technology or jurisdiction)
- Itemized invoice that includes SCP, vendor, and BayREN incentives, labor, and materials (see Appendix G, Sample Invoice)
- A signed Notice of Completion (See Appendix H) Invoices, permits, and Notices of Completion will be reviewed and verified before any SCP incentives are paid.

## [Financing Projects Only] Contractor Payment

Once close out documentation is reviewed and approved, SCP will issue payment directly to the contractor for the On-Bill Financing amount, plus the SCP incentive amount. Payments will be processed on the 1st and 15th of each month. For projects that are not participating in On-Bill Financing, the contractor will be paid directly by the customer.

## Customer Process for Customer Incentives & Financing

The below section outlines the process for customers to complete projects through the Advanced Energy Center. A separate customer manual is provided via the Advanced Energy Center website.

### Account Creation

To access the Advanced Energy Center incentives and participating contractors, a customer must provide their name, contact information, and PG&E account number to the Advanced Energy Center website. As a part of the enrollment process, the customer's account will be automatically verified. If a customer does not know their PG&E account number, they may call our local Contact Center at 855-202 2139 Monday-Friday from 8:00 AM to 5:00 PM.

### Selecting Products and Contractors

Once eligibility has been verified, a customer will be able to view Advanced Energy Center technologies, incentives, and contractors. Contractors listed on the Contractor Network are participating in SCP's On-Bill Financing program when profile states 'Financing Certified'. If interested in receiving financing for their project, a customer must select a contractor that is participating in the On-Bill Financing program.

Once a product is selected, the customer will receive their randomly generated order number. This order number is used by the product vendor to pass on any SCP and vendor incentives. Income-qualified customers on a CARE or FERA electricity rate is eligible for additional SCP incentives, which will be indicated on the customer's order.

### [For Financing Projects Only] Screening Application

If interested in receiving On-Bill Financing, the customer must complete an On-Bill Financing Screening Application for SCP to review. The Screening Application is available on the Advanced Energy Center website as a part of the checkout process when selecting a product. Within three business days, a customer will be notified whether their application is approved or denied.

### Selecting Bids, Installation and Project Timeline

Customers will receive an e-mail after a bid has been uploaded to the Advanced Energy Center website. Bids can be reviewed via the website where a customer can select which bid they would like to move forward with.

Projects are required to be completed within 120-days of the customer accepting the bid. Projects are considered complete when close-out documentation is uploaded. If an extension to the 120-day deadline is required, contractors or customers can contact the Advanced Energy Center team through the messaging feature in the Advanced Energy Center website (see [scpadvancedenergycenter.org/contact](https://scpadvancedenergycenter.org/contact)) to request an extension. If 120-days elapse without an extension request or a contractor uploading project close out documentation, all incentives tied to that order number and project will expire and a new order number will need to be issued.

For projects receiving On-Bill Financing, any changes to the work scope and/or pricing will require the On-Bill Financing Agreement to be updated (See section below).

### [Financing Projects Only] On-Bill Financing Agreement

Projects participating in On-Bill Financing must execute an On-Bill Financing Agreement before installation. Once a customer has selected a contractor bid, Advanced Energy Center staff will populate the On-Bill Financing Agreement and send the agreement to the customer for review. This agreement will include an estimate of the monthly on-bill charge based on the approved technologies, the contractor's bid for labor and materials, and the customer's selected repayment terms. A contractor will be notified that they can begin installation once the Agreement has been signed by the customer and Advanced Energy Center staff. It is the responsibility of the customer and contractor to enter a separate contract to complete a project in accordance with the contractor's requirements.



Any changes to the work scope and/or pricing that occur after the Agreement has been executed will require the contract to be updated and may change a customer's repayment terms.

SCP incentives for products aligned with Advanced Energy Center technologies are displayed on the Advanced Energy Center website. See Appendix A for a list of Advanced Energy Center technologies and associated SCP incentives.

### **Changes to Bids**

Customers will work directly with their contractor throughout their project's development.

For incentive-only projects, if a change to the project scope impacts the incentive amount, the customer must notify the Advanced Energy Center team cc'ing their contractor, and the contractor must upload a new bid to the Advanced Energy Center website.

For projects receiving On-Bill Financing, any changes to the work scope and/or pricing will require a change order and an amendment to the On-Bill Financing Agreement in addition to the customer notifying the Advanced Energy Center team and the contractor submitting a new bid.

### **Project Close Out**

The installing contractor must upload the project close out documents to the Advanced Energy Center website within 120-days of the customer selecting a bid. Customers must sign the following documents as a part of project close out:

- A signed Notice of Completion (See Appendix H)

The Invoices, permits, and Notices of Completion provided by the contractor will be reviewed and verified before any SCP incentives are paid.

### **[Financing Projects Only] Bill Repayment Begins**

Once close out documentation is received, SCP will begin the process of adding the on-bill financing repayment to the customer's bill. It may take up to three bill cycles for the repayment to start to appear on the bill.

### **Post-Installation Survey**

A post-installation survey will be distributed to customers via email upon project close-out. If the survey has not been completed within 72 hours of distribution, a reminder email will be sent to the customer.

## Program Eligibility

To be eligible to receive Advanced Energy Center incentives and/or financing, a potential participant must be a customer of SCP. A customer can confirm whether they are an SCP customer by looking at the first page of their PG&E bill (see image beside) or by calling SCP's local call center at 855-202-2139.

To be eligible for on-bill financing, a potential participant must be a residential customer of SCP that owns their property and meet the following additional requirements.

- Participant must complete the OBF Screening Application on the Advanced Energy Center website at [scpadvancedenergycenter.org](http://scpadvancedenergycenter.org).
- Participant must be the owner of the site where efficiency measures will be installed.
- Participant must be in good standing for the previous 3 SCP/PG&E billing statements.
- Participant must not have more than two active On-bill Financing loans associated with their site.

## Living Document

This manual is a living document. It is subject to change and current versions will be posted at [scpadvancedenergycenter.org](http://scpadvancedenergycenter.org) for contractors to access.

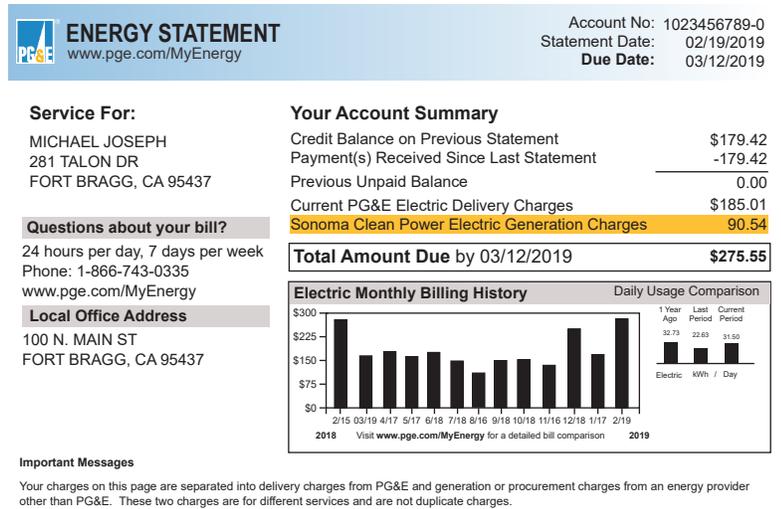


Fig 2. Example of PG&E bill, with the highlighted portion indicating a Sonoma Clean Power customer.

## Appendix A - Advanced Energy Center Technologies and Associated Incentives

Note: The total incentive for standard customers and the maximum total incentive for income-qualified customers cannot exceed the cost of the product.

Limit one incentive per technology type per customer account.

Technology	Product specification for SCP incentive	SCP incentive	BayREN incentive <sup>1</sup>	Eligible for self-install	Eligible for On-Bill Financing
Heat pump air-to-air, space heating and cooling	Ducted, central split DX 18 SEER or higher	\$500	\$1,000		✓
	Ductless, single zone 20 SEER or higher	\$500	\$1,000		✓
	Ductless, multi-zone 17 SEER or higher	\$1,000	\$1,000		✓
Heat pump water heater <sup>2</sup>	3.43 UEF or higher Wi-fi enabled	\$700	\$1,000		✓
Sanden ECO2 heat pump water heater	N/A	\$700	\$1,000		✓
Induction cooktop (residential)	N/A	Induction kitchenware set	\$300	✓	✓
Heat recovery dish machine	See website	\$500	N/A	✓	
Heat recovery ventilator	See website	\$100 to 250	N/A		✓
Air-to-water heat pump	Chilltrix	\$1,000	N/A		✓
	Spacepak 3-ton	\$1,000	N/A		✓
	Spacepak 5-ton	\$1,000	N/A		✓
Smart thermostat	See website	\$50	\$150	✓	

<sup>1</sup> Incentive eligibility must be confirmed through BayREN: please see this website: [https://www.bayrenresidential.org/sites/default/files/2021-04/BayREN\\_Home%2B\\_Measures\\_4\\_1\\_2021.pdf](https://www.bayrenresidential.org/sites/default/files/2021-04/BayREN_Home%2B_Measures_4_1_2021.pdf). Incentive eligibility is subject to change.

<sup>2</sup> Heat pump water heaters require a wi-fi module to enable grid-interactivity, a demand-response capability that may qualify for additional incentives through SCP's GridSavvy program. The SkyCentrics CTA-2045 module is listed on the Advanced Energy Center products page.

Technology	Product specification for SCP incentive	SCP incentive	BayREN incentive <sup>3</sup>	Eligible for self-install	Eligible for On-Bill Financing
EV charger	ClipperCreek (hardwire or plug-in)	\$454.50	N/A	✓	
	JuiceBox hardwire	\$382	N/A	✓	
	JuiceBox plug-in	\$376.50	N/A	✓	
Battery storage system (residential)	sonnen Electriq Power	\$0	N/A		



<sup>3</sup> Incentive eligibility must be confirmed through BayREN: please see this website: [https://www.bayrenresidential.org/sites/default/files/2021-04/BayREN\\_Home%2B\\_Measures\\_4\\_1\\_2021.pdf](https://www.bayrenresidential.org/sites/default/files/2021-04/BayREN_Home%2B_Measures_4_1_2021.pdf). Incentive eligibility is subject to change.

## Appendix B – Contractor Requirements and Product Purchasing Guide

If a contractor has sufficient installation experience for a given product, they may bypass approval requirements via the Attestation of Product Installation Experience on the last page of this document. If applicable, complete and return to [advancedenergycenter@sonomacleanpower.org](mailto:advancedenergycenter@sonomacleanpower.org).

Technology type	Manufacturer	Technology distributor	Prerequisites	How to become an approved installer	How to purchase (only local distributors display address)
Mini-split heat pump	Various	N/A	Home+ Contractor AND B (General) OR C-20 (HVAC)	Become a BayREN Home+ Contractor	Eligible models can be purchased from any retailer.
Air-to-water heat pump	Chiltrix	Sensible Technologies	C-4 (Boiler, Hot water) OR B (General)	Contact Sensible Technologies: John Grose <a href="mailto:jgrose@sensibletechnologies.net">jgrose@sensibletechnologies.net</a>  When complete, notify SCP via email: <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Set up account with Sensible Technologies. Become a Participating Installer for details.
	SpacePak	Small Planet Supply		Contact Small Planet Supply: Griffin Wood (855) 500-8228 or <a href="mailto:albert@smallplanetsupply.com">albert@smallplanetsupply.com</a>  When complete, notify SCP via email: <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Place orders by email, address to: Griffin Wood <a href="mailto:sales.usa@smallplanetsupply.com">sales.usa@smallplanetsupply.com</a>  Website: <a href="http://smallplanetsupply.us/">smallplanetsupply.us/</a> Phone: (855) 500-8228
Aerosol sealing <sup>1</sup>	Aeroseal	Aeroseal	Hold a NATE, BPI, RESNET, or similar certification	Purchase of the Aeroseal system is required to be an installer. Contact Aeroseal: Paul Springer (937) 974-8084 or <a href="mailto:paul.springer@aeroseal.com">paul.springer@aeroseal.com</a>  Send your certificate to <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Phone: (937) 428-9300 ext 336 Mobile: (937) 974-8084 Website: <a href="http://aeroseal.com/become-a-partner/">aeroseal.com/become-a-partner/</a>

<sup>1</sup> Product will be listed on the website once a minimum of two participating contractors are secured

<sup>2</sup> Product is eligible for self-installation by the customer

Technology type	Manufacturer	Technology distributor	Prerequisites	How to become an approved installer	How to purchase (only local distributors display address)
Heat pump water heater	Rheem/Ruud	N/A	Home+ Contractor AND B (General) OR C-10 (Electrical) AND C-36 (Plumbing)	Become a BayREN Home+ Contractor	Eligible models can be purchased from any retailer.
	A.O. Smith				
	Sanden	Small Planet Supply		Contact Small Planet Supply: Griffin Wood (855) 500-8228 or <a href="mailto:albert@smallplanetsupply.com">albert@smallplanetsupply.com</a> When complete, notify SCP via email: <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Place orders by email, address to: Griffin Wood <a href="mailto:sales.usa@smallplanetsupply.com">sales.usa@smallplanetsupply.com</a> Website: <a href="http://smallplanetsupply.us/">smallplanetsupply.us/</a> Phone: (855) 500-8228
Nighttime ventilation / economizer <sup>1</sup>	Airscape	Small Planet Supply	B (General) OR C-20 (HVAC)	Contact Small Planet Supply: Griffin Wood (855) 500-8228 or <a href="mailto:albert@smallplanetsupply.com">albert@smallplanetsupply.com</a> When complete, notify SCP via email: <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Place orders by email, address to: Griffin Wood <a href="mailto:sales.usa@smallplanetsupply.com">sales.usa@smallplanetsupply.com</a> Website: <a href="http://smallplanetsupply.us/">smallplanetsupply.us/</a> Phone: (855) 500-8228
Whole house fan <sup>1</sup>				Complete and return Attestation below OR Contact Small Planet Supply: Griffin Wood (855) 500-8228 or <a href="mailto:albert@smallplanetsupply.com">albert@smallplanetsupply.com</a> When complete, notify SCP via email: <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	
Heat recovery ventilator	Zehnder				
Heat recovery dish machine	Meiko	Myer's Restaurant Supply	None	Complete and return Attestation below OR Contact Myer's Restaurant Supply: Marty Basurto (707) 298-3464 When complete, notify SCP via email: <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Call to Purchase: (707) 755-3054 Website: <a href="http://myersrestaurantsupply.com/">myersrestaurantsupply.com/</a> 1599 Cleveland Ave Santa Rosa CA 95401
Commercial induction cooktop <sup>1</sup>	Various	Myer's Restaurant Supply	None	Complete and return Attestation below OR Contact Myer's Restaurant Supply: Marty Basurto (707) 298-3464 When complete, notify SCP via email: <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Call to Purchase: (707) 755-3054 Website: <a href="http://myersrestaurantsupply.com/">myersrestaurantsupply.com/</a> 1599 Cleveland Ave Santa Rosa CA 95401

<sup>1</sup> Product will be listed on the website once a minimum of two participating contractors are secured

<sup>2</sup> Product is eligible for self-installation by the customer

Technology type	Manufacturer	Technology distributor	Prerequisites	How to become an approved installer	How to purchase (only local distributors display address)
Residential induction cooktop <sup>2</sup>	Various	Teevax	None	Complete and return Attestation below OR Contact Teevax: Justin Montague (707) 595-0214 or <a href="mailto:justin@teevax.com">justin@teevax.com</a>  When complete, notify SCP via email: <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Purchase from Teevax: Mobile: (707) 595-0214 Website: <a href="http://teevax.com/catalog/induction-cooktop">teevax.com/catalog/induction-cooktop</a> 422 Wilson St, Santa Rosa CA 95401
Phase change material <sup>1 2</sup>	Insolcorp	Insolcorp	B (General) OR C-2 (Insulation)	Complete and return Attestation below OR Contact Insolcorp: Mick Dunn (800) 509-2199 or <a href="mailto:mick@insolcorp.com">mick@insolcorp.com</a>  When complete, notify SCP via email: <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Phone: (800) 509-2199 Website: <a href="http://insolcorppcm.com/products/">insolcorppcm.com/products/</a>
Smart thermostat <sup>2</sup>	ecobee	TechniArt (through GridSavvy program)	None	Complete and return Attestation below OR Complete online training at <a href="https://www.ecobee.com/contractor-training-signup/">https://www.ecobee.com/contractor-training-signup/</a> .  Send certificate to <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Place orders online: <a href="http://www.sonomacleanpower.org/gridsavvy">www.sonomacleanpower.org/gridsavvy</a>  Questions? <a href="mailto:gridsavvy@sonomacleanpower.org">gridsavvy@sonomacleanpower.org</a>
	Nest			[In Process]	
EV Chargers	JuiceBox	Enel X (through GridSavvy program)	B (General) OR C-10 (Electrical)	Complete and return Attestation below OR Complete the Certification Program under Installer Services at <a href="https://docs-emobility.enelx.com/Installers/">https://docs-emobility.enelx.com/Installers/</a> .  Send your certificate to <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Place orders online: <a href="http://www.sonomacleanpower.org/gridsavvy">www.sonomacleanpower.org/gridsavvy</a>  Questions? <a href="mailto:gridsavvy@sonomacleanpower.org">gridsavvy@sonomacleanpower.org</a>
	ClipperCreek				
EV-to-home battery <sup>1</sup>	Ossiaco	[In Process]	B (General) OR C-10 (Electrical)	[In Process]	[In Process]

<sup>1</sup> Product will be listed on the website once a minimum of two participating contractors are secured

<sup>2</sup> Product is eligible for self-installation by the customer

Home battery system	Electriq Power	CED Greentech	B (General) OR C-10 (Electrical)	Complete the online training at <a href="https://electriqpower.com/rsvp#register">https://electriqpower.com/rsvp#register</a> . Send your certificate to <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>	Place orders by email, address to: Tyson Berg <a href="mailto:tyberg@cedgreentech.com">tyberg@cedgreentech.com</a>
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<sup>1</sup> Product will be listed on the website once a minimum of two participating contractors are secured

<sup>2</sup> Product is eligible for self-installation by the customer

# Appendix C – OBF Contractor Payment Request Form

DATE OF SUBMITTAL:

ORDER #    CLOSE-OUT PROJECT DATE    LOAN NUMBER    APPROVED OBF LABOR    APPROVED OBF MATERIALS    TOTAL PROJECT COST    SCP INCEN-TIVE    CARE/ FERA DISCOUNT    VENDOR DISCOUNT    OTHER DISCOUNT    PAYMENT TOTAL    COMPANY    REMIT TO    ADDRESS    CITY    STATE    ZIP CODE

Order #	xx/xx/xxxx	Number	\$Amt	Text	Text	Text	Text	Text	Text							

Current as of 9/1/2021



## 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](mailto:advancedenergycenter@sonomacleanpower.org) or call us at (707) 324-3223.

### Contractors Getting Started

<input type="checkbox"/>	1. Complete a Contractor Application at <a href="http://scpadvancedenergycenter.org/contractor-resources/contractor-application">scpadvancedenergycenter.org/contractor-resources/contractor-application</a>
<input type="checkbox"/>	2. Once received by program staff, sign the Incentive Only Professionals Agreement and return to <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>
<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 <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a>
<input type="checkbox"/>	b. Watch the 50-minute webinar recording of the <a href="#">contractor certification course</a> by clicking 'View Webinar' then complete this brief online <a href="#">survey</a> .

### 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 <a href="http://SCPAdvancedEnergyCenter.org/products">SCPAdvancedEnergyCenter.org/products</a> 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 <a href="http://scpadvancedenergycenter.org/forms/contractor-bid-submission">scpadvancedenergycenter.org/forms/contractor-bid-submission</a> along with requested customer and project information
<input type="checkbox"/>	6. If the customer accepts your bid, tell them to email <a href="mailto:advancedenergycenter@sonomacleanpower.org">advancedenergycenter@sonomacleanpower.org</a> 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 <a href="http://scpadvancedenergycenter.org/contractor-resources/project-completion-form">scpadvancedenergycenter.org/contractor-resources/project-completion-form</a> . 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. <b>If needed,</b> direct them to <a href="http://scpadvancedenergycenter.org/es/forms/customer-on-bill-financing-application">scpadvancedenergycenter.org/es/forms/customer-on-bill-financing-application</a> .
<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 <b>before continuing work:</b>
<input type="checkbox"/>	a. Submit a revised bid at <a href="http://scpadvancedenergycenter.org/forms/contractor-bid-submission">scpadvancedenergycenter.org/forms/contractor-bid-submission</a> 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 <a href="http://scpadvancedenergycenter.org/contractor-resources/project-completion-form">scpadvancedenergycenter.org/contractor-resources/project-completion-form</a> .
☐	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.

# Appendix E – Contractor Bid Template

**CONTRACTOR NAME:**

[Street Address]  
[City, ST, Zip Code]  
[Phone]  
[Email]

**BID INFO:**

[Bid #]  
[Bid Date]

**INVOICE TO:**

[Customer Name]  
[Street Address]  
[City, ST, Zip Code]  
[Phone]

**INSTALL SITE:**

[Street Address]  
[City, ST, Zip Code]

ORDER #	MODEL	PRODUCT DESCRIPTION	UNIT PRICE	VENDOR INCENTIVE	SCP INCENTIVE	BAYREN REBATE	CARE/FERA INCENTIVE	INSTALLATION/ LABOR	LINE TOTAL
Order #	Text	Product Description	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount
Order #	Text	Product Description	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount

ORDER #: \_\_\_\_\_ ANCILLARY MATERIAL

ANCILLARY MATERIAL	QUANTITY	EXPENSE DESCRIPTION	UNIT PRICE	LINE TOTAL
Product	Number	Product Description	\$Amount	\$Amount
Product	Number	Product Description	\$Amount	\$Amount

ORDER #: \_\_\_\_\_ ANCILLARY MATERIAL

ANCILLARY MATERIAL	QUANTITY	EXPENSE DESCRIPTION	UNIT PRICE	LINE TOTAL
Product	Number	Product Description	\$Amount	\$Amount
Product	Number	Product Description	\$Amount	\$Amount

This bid is based on orders and associated products listed above, including labor itemized for installation of each product and estimates of ancillary materials. All listed information must be completed by the contractor for this bid to be valid. By signing and dating below, the receiving customer listed above accepts this bid:

Customer Signature:	Date:
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Total Incentives	
Subtotal	
Sales Tax	
<b>Total Due</b>	

## Appendix G – Invoice Template, On-Bill Financed Projects

Contractors may use any invoice format as long as required items are included. **All items are required except those in grey.**

### CONTRACTOR INFO:

[Company Name]  
[Street Address]  
[City, ST, Zip Code]  
[Phone]  
[Email]

### INVOICE INFO:

[Invoice #]  
[Invoice Date]

### INVOICE TO:

[Customer Name]  
[Street Address]  
[City, ST, Zip Code]  
[Phone]

### INSTALL SITE:

*If different from invoice*  
[SCP Customer Name]  
[Street Address]  
[City, ST, Zip Code]

### PAYMENT TERMS:

[Terms]

### DUE DATE:

[Invoice due date]

### INCENTIVIZED PRODUCT

*Find the order number  
in emails from  
advancedenergycenter  
@sonomacleanpower.  
org*

ORDER #	MAKE	MODEL #	UNIT	CARE/FERA INCENTIVE	BAYREN HOME+ INCENTIVE	VENDOR INCENTIVE	SCP INCENTIVE	INSTALLATION/ LABOR	LINE TOTAL
Order #	Text	Product	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount
Order #	Text	Product	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount	\$Amount

### ANCILLARY MATERIALS

*Ancillary materials are expenses necessary to install the incentivized product(s), for example a new subpanel*

ORDER #	ANCILLARY MATERIAL	QUANTITY	MATERIAL DESCRIPTION	UNIT PRICE	LINE TOTAL
Number	Product	Number	Product description	\$Amount	\$Amount
Number	Product	Number	Product description	\$Amount	\$Amount
Number	Product	Number	Product description	\$Amount	\$Amount

OTHER MATERIALS

*This includes any costs related to the project that are not Incentivized Products or Ancillary Materials*

These costs will not be included in your financed total. Note you will receive a separate repayment term sheet from Sonoma Clean Power

ORDER #	ANCILLARY MATERIAL	QUANTITY	EXPENSE DESCRIPTION	LABOR/UNIT PRICE	LINE TOTAL
Number	Product	Number	Product description	\$Amount	\$Amount
Number	Product	Number	Product description	\$Amount	\$Amount
Number	Product	Number	Product description	\$Amount	\$Amount

Total Incentives	
Subtotal	
Sales Tax	
<b>Customer Deposits and or Progress Payments received by Contractor</b>	
<b>Total Due from SCP (Financed Amount)</b>	
<b>Total Due from Customer</b>	

## Appendix H - Notice of Completion

The following is to be submitted, along with other close-out documents, upon completion of each incentive-only project receiving an incentive through the Advanced Energy Center.

### Sonoma Clean Power Advanced Energy Center Project Incentive-Only Notice of Completion

This gives notice to Sonoma Clean Power that the project as described in the invoice number referenced below has been completed.

Install Site Address: \_\_\_\_\_

Invoice Number Referenced: \_\_\_\_\_

With the signature below, Customer attests that they are authorized to sign this Notice on behalf of the parties involved.

Customer understands that if either party does not sign this Notice, Sonoma Clean Power or its representative shall determine, using telephone verification and/or onsite inspection, whether equipment or services eligible for any Sonoma Clean Power Incentive were installed according to associated program requirements. Customer further understands that Sonoma Clean Power's determination of equipment or service eligibility and or installation will be final.

**Customer  
or Customer Authorized Representative**

Name (Print): \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

