

# Site Eval Scheduling at time of Sale is required on ALL new sales.

The sales rep needs to call 888-495-8225 (8am-8pm Mon-Fri, 9am-5pm Sat) as soon as you close the sale to speak to a scheduling coordinator to get the site eval scheduled for the customer.



## Paperwork Checklist

\*\*\* Must be submitted with ALL deals \*\*\*

<b>Customer Info:</b> (Print Legibly)	Name: _____
	FULL Address: _____
	Best Phone #: _____ 2nd Phone#: _____
	Email address: _____

Sales Rep: \_\_\_\_\_  
 Contract Price: \$ \_\_\_\_\_  
 Contract Date: \_\_\_\_\_  
 Inverter/s: \_\_\_\_\_  
 # of Panels: \_\_\_\_\_  
 Panel type: \_\_\_\_\_  
 HOA approval required: YES NO

Payment Terms: SunPower Sunrun HERO Enerbank  
 (circle all that apply) CASH Ygrene Greensky Other \_\_\_\_\_

SR Proposal ID: \_\_\_\_\_  
 SPR Lease #: \_\_\_\_\_

MSP (existing): \_\_\_\_\_ MSP have a lock? YES NO  
 Ceiling type: Open Beam or Attic  
 Gated Community? YES NO Code: \_\_\_\_\_

Panel UPGRADE: YES NO De-Rate MSP instead? \_\_\_\_\_ House: 1 Story or 2 Story  
 Sub-panel: YES NO Location: \_\_\_\_\_ Trenching for conduit run needed? \_\_\_\_\_  
 ROOF Type:  Clay Tile  Double Stacked Tile  Cement Tile  Comp Shingle  FLAT roof Other \_\_\_\_\_  
 Move existing Thermal / DHW? YES NO If yes, how many? \_\_\_\_\_

\*\*\*\* NOTES - i.e. Ground mount info, existing thermal info, locked gates, gate codes, dogs in yard, roof notes, etc:

### Smart Energy Solar New Deal Requirements

- DID YOU CHECK TITLE FOR CORRECT NAMES? Yes No IS PROPERTY HELD IN A TRUST? Yes No
- Customer Utility bill (must show name, property address, electric rate, 12 mnth usage history, account #, meter #)
- SES Contract signed by customer & sales rep (only for purchases)
- Design layout (must clearly show the panel array on the roof)
- SPR 5 pg Lease Proposal (must have customer signature on pg 4, if rate is TOU then bottom of pg 2 also)

#### Southern California Edison Required Paperwork

- SCE NEM \* UNDER\* 10kw (7pg) Form # 14-923 **OR**  SCE NEM \* OVER\* 10kw (7pg) Form # 16-344  
 (For both NEM forms- only have customer sign pg7- DO NOT fill out form)
- SCE Authorization Form (fill out everything highlighted in yellow)

#### San Diego Gas & Electric Required Paperwork

- SDGE NEM Agreement (4 pg)  SDGE Authorization Form

#### Pacific Gas & Electric Paperwork

- PG&E NEM Agreement Form # 79-1151A (only have customer sign pg5- DO NOT fill out form)

#### Los Angeles Dept Water & Power

REBATE: YES or NO

- LADWP Interconnection NEM form  LADWP CSI Compliance Form
- LADWP Request to Forward Payment Form  Energy Audit (<http://hes.lbl.gov/consumer>)

#### Imperial Irrigation District

- Interconnection Agreement  CSP Doc Package (3 pgs)
- Interconnection Application  Rule 21 Application \* (for all systems over 10kw)

- Other Utility: \_\_\_\_\_ REBATE: YES or NO