

## Program Forms Checklist

	Form Name	Format	Description
Customer or Vendor	1 <input type="checkbox"/>	Authorization to Receive Customer Usage Information Form	PDF Form Gives authorization to ADR Team to access the customer's electricity interval usage data
	2 <input type="checkbox"/>	PG&E ADR Application Form	PDF Form Basic application information including customer and vendor contacts, project address, and payee information. Details the terms and conditions of the ADR Program
	3A <input type="checkbox"/>	Project Description	Report / Memo / Calculation File Describes facility and proposed load shed strategies, data and technical specs on equipment to be turned down or turned off, project and cost estimates
			<b>Additional information requirements for your project type(s):</b> <a href="#">Rooftop Package Air-Conditioning Cycling</a> <a href="#">Temperature Reset in Commercial Building Interior</a> <a href="#">Lighting Curtailment</a> <a href="#">Agricultural Water Pumping</a> <a href="#">Industrial or Process Load Curtailment</a> <a href="#">Refrigerated Warehouse Curtailment</a>
		<i>or</i>	
	3B <input type="checkbox"/>	<a href="#">FastTrack Calculation Form</a>	Excel Table In lieu of Project Description for small office and retail facilities with less than 200 kW
	<i>or</i>		
	3C <input type="checkbox"/>	I would like the ADR Program to suggest options for load shed strategy, DR Program, and/or signaling options	
ADR Team	4 <input type="checkbox"/>	Project Review	Report Summary of proposed ADR project including results of meter data analysis, kW load shed analysis, recommended kW load shed commitment, estimated ADR incentives.
	5 <input type="checkbox"/>	Project Approved	Email Notifies Customer of PG&E approval of project, assigned application number and ADR incentives reservation. Authorization to install. Summary of key project requirements under ADR program.
Customer or Vendor	6 <input type="checkbox"/>	Project Acceptance Email	Email Customer intent to proceed and acceptance of ADR requirements
	7 <input type="checkbox"/>	Project Invoices	Custom Documentation of equipment and labor costs of ADR project including itemized for costs above \$5,000
	8 <input type="checkbox"/>	Installation Form	Word or PDF Description of load shed strategy, OpenADR certified client information, setup and configuration with PG&E DRAS
	9 <input type="checkbox"/>	Incentive Recipient Certification	PDF Form Confirms that project installation work was performed by licensed contractors
ADR Team	10 <input type="checkbox"/>	Verification Report	Report Summary of post installation inspection findings and load shed test results
	11 <input type="checkbox"/>	First Payment Confirmation	Email Confirmation of 60% incentive payment upon completion of installation, inspection, and testing
	12 <input type="checkbox"/>	Second Payment Confirmation	Email Confirmation of load shed performance in kW and corresponding 40% incentive payment upon participation in one full DR season