

Program Forms Checklist

	Form Name	Format	Description
Customer or Vendor	1 <input type="checkbox"/> Share My Data or Authorization to Receive Customer Usage Information Form	pge.com or PDF Form	Gives authorization to ADR Team to access the customer's electricity interval usage data. Access Forms Here: ShareMy Data Tutorial Authorization to Receive Customer Usage Information Form Instructions for Data Authorization Form
	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 Additional information requirements for your project type(s): Rooftop Package Air-Conditioning Cycling Temperature Reset in Commercial Building Interior Lighting Curtailment Agricultural Water Pumping
	<i>or</i>		
	3B <input type="checkbox"/> FastTrack Calculation Form	Excel Table	For small office and retail facilities 499 kW and less, plus Project cost estimate. In lieu of Project Description 3A. <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 (100% for FastTrack)
	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 (N/A for FastTrack)