

## 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.  <b>Access Forms Here:</b> <a href="#">ShareMy Data Tutorial</a> <a href="#">Authorization to Receive Customer Usage Information Form</a> <a href="#">Instructions for Data Authorization Form</a>	
	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>	
	<i>or</i>			
	3B <input type="checkbox"/> <a href="#">FastTrack Calculation Form</a>	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)	