

This is the most ideal documentation that the Project Team can provide to IncentiFind. This checklist will make capturing incentives easier for APPLY Services + GC's.

IncentiFind will need to have a consistent point of contact throughout the APPLY process. If there is a change in contact, we need to know ASAP.



REBATE DOCUMENTATION CHECKLIST

PRE-CONSTRUCTION DOCUMENTS

- Access to Construction Document Sharing Platform
 - Access to the Construction Management software alone could address all documentation on this checklist
 - Examples: ProCore, BuilderTrend, Autodesk, BuildPro, etc.
- Construction Timeline
 - Milestone Schedule is preferred (i.e. installation start and end dates for eligible equipment)
- Spec/Cut Sheets
 - For any equipment that an incentive is being applied for (i.e. MEP, Building envelope, etc.)
- Energy Savings Documentation
 - Energy Model from A&E
 - Proposal which shows estimated energy savings against existing conditions (retrofit) or IECC (new construction/gut rehab)
- Title 24 Analysis - California Projects Only!

MOBILIZATION/DURING CONSTRUCTION

- Temporary or Permanent Meter Information
 - Utility account Info such as company name and account number
- 100% Construction Documents
 - Especially Architectural and MEP
- Final Submittal Packages
 - For any equipment that an incentive is being applied for (i.e. MEP, Building envelope, etc.)
- ComCheck for Lighting
 - Must be signed by a Licensed professional

POST CONSTRUCTION

- Itemized Invoices for any equipment that an incentive is being applied for
 - Make, Model, Quantity + Cost must be shown on this proof of purchase
 - Bill of Sale could work if the above mentioned is covered
- Proof of Occupancy
 - Copy of C/O, or
 - Provide the Date of Occupancy