



ENERGY SAVINGS ASSISTANCE COMMON AREA MEASURES

VERIFICATION PACKAGE CHECKLIST

The Verification Package Checklist includes all required Project completion documentation and should be used by ESA CAM customers to complete a project verification package. Submitting a complete and organized verification package streamlines the review process and payment timeline. This checklist is meant to ensure all Project completion documentation is complete and accurate prior to submittal.

Customers do not need to submit this checklist with your verification package. Contact your ESA CAM case manager with any questions related to the verification process.

Verification Package Checklist

	Document	Verification Purpose	Document Requirements	Applicable Measures	
1.	Application	Confirm incentive assignment.	Incentive assignment box must be checked on the Project's application if the incentive is assigned to the contractor.	All	<input type="checkbox"/>
2.	W9	Confirm payee information.	Must match the incentive recipient listed on the Application.	All	<input type="checkbox"/>
3.	PG&E Utility Bills	Confirm active SA IDs.	PG&E bills are required at the time of application to confirm active SA ID accounts.	PG&E service-only	<input type="checkbox"/>
4.	Customer Verification Tool	Confirm scope of work, incentive totals, and changes at verification.	Customer Verification Tool used to compare invoiced quantities, costs, model numbers, etc., to ESA CAM Approved scope of work.	All	<input type="checkbox"/>
5.	ESA CAM Verification Photo Template	Confirm installation locations and model numbers.	Must include representation of each installed measure on site. Model and/or serial numbers must be visible and align with approved scope.	All	<input type="checkbox"/>
6.	Cut Sheets	Confirms measure efficiency and use-type specifications.	Include spec sheets for all installed equipment on site. Model numbers on spec sheets must match invoices and photos.	All	<input type="checkbox"/>
7.	Closed Permits	Confirm permits are closed and all measures complied with local jurisdiction regulations.	Ensure the copies of closed permits have a signature from the inspector with the sign-off date. Closed permits must include copies of permit fees.	Lighting, HVAC, DHW, Insulation, others per jurisdiction	<input type="checkbox"/>
8.	Invoices	Confirm the customer is billed for the approved ESA CAM funding levels.	Invoices must have material, labor, and additional services as separate line items. Costs must align with the Customer Verification Tool. Invoices must include model numbers with associated measures and due upon receipt terms noted.	All	<input type="checkbox"/>
9.	HERS Certification Form	Confirm HERS testing results passed and forms have been filed with appropriate entities.	Must include project site information and show passing HERS results for the applicable measures.	HVAC	<input type="checkbox"/>
10.	Verification & Certification Form	Confirm incentive total, scope of work, incentive recipient and HVAC permitting requirements.	Property representative must complete the verification form. Each measure total must align with the totals in Customer Verification Tool. California Public Utilities Commission requires incentive recipient and HVAC installing or overseeing contractor to certify project compliance.	All & HVAC	<input type="checkbox"/>

