



Verification Package Checklist

The Verification Package Checklist is designed to assist Multifamily Energy Savings program participants assemble a complete ESA Multifamily Energy Savings project verification package. Please use this checklist to confirm you have submitted all required documents to receive your incentive payment. **Participants do not need to submit the checklist with their verification package.** Contact your Energy Advisor with any questions about the verification process.

#	Document	Verification Purposes	Document Requirements	Check when Submitted
1	Property-Level Application & POA	Confirm incentive payee.	Incentive payee is included on the Property Application.	<input type="checkbox"/>
2	W-9	Confirm payee information.	Must match the incentive payee listed on the Property Application.	<input type="checkbox"/>
3	Utility Bills	Confirms active account.	Utility bills are required at the time of application to confirm active accounts.	<input type="checkbox"/>
4	Measure Specification Sheets	Confirm measure meets program efficiency and use-type requirements.	Include specification sheets for all approved and installed equipment. Model numbers on specification sheets must match invoices and photos. If applicable, provide AHRI certificate with reference number for HVAC.	<input type="checkbox"/>
5	Project Verification Form	Confirm completed scope of work and total project costs.	Property owner/representative must complete the verification form.	<input type="checkbox"/>
6	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.	<input type="checkbox"/>
7	Invoices	Confirm the total cost of the project.	Invoices must include a breakdown between materials and labor and represent the total cost to install the work, not just the incentive value.	<input type="checkbox"/>
8	Closed Permits	Confirm permits are closed and all measures complied with local jurisdiction regulations.	Ensure closed permits have a signature from the inspector with the sign-off date. Closed permits must include copies of permit fees.	<input type="checkbox"/>
9	Incentive Recipient Certification	Certifies the work is complete and complies with permitting and licensing requirements	Incentive recipient completes and signs.	<input type="checkbox"/>
10	Project HVAC Certification Form	Confirm project complied with applicable HVAC permitting requirements and installing contractor had required license.	Installing contractor completes and signs.	<input type="checkbox"/>
11	HERS Certification Forms	Confirm project has met HERS requirements.	Provide certificate of compliance and certificate of verification: CF-1R and CF-3R for residential systems, NRCC-MCH-E and NRCV-MCH-04 for non-residential systems.	<input type="checkbox"/>

