



Contractor Checklist for Residential On-Bill Program Installations

Applicant Information. The Applicant is the person or persons on the Hawaiian Electric Companies Utility Account.	
Applicant(s)	
Address:	
Phone & Email:	

Step 1: Applicant [Rate payer] Eligibility

Items required from Homeowner or Renter Applicant(s) and Landlord to HGIA:

- ☐ Completed and signed **GEM\$ Homeowner OR Renter Application** in Banyan portal
- ☐ Completed and signed **Utility Authorization** form, uploaded to Banyan Application
- ☐ Uploaded **household energy usage information data** to Banyan:
 - Green Button Data csv (for applicants that have a Smart Meter) **OR**
 - Completed Household Usage Info Form
- ☐ Copy of **Driver's License or valid Government Issued I.D.**, uploaded to Banyan Application
- ☐ Most recent **utility bill** (must be current on payments and have at least 6 months history), uploaded to Banyan Application
- ☐ Copy of **original DHHL lease or other ground lease** (if applicable), uploaded to Banyan Application
- ☐ Copy of **Certificate of Motor Vehicle Registration & Hawaii Vehicle Inspection** (applicable if the homeowner/renter intends to purchase an electric vehicle within the next 12 months)
- ☐ Additional Documents may be required if there are changes in property title and/or trust:: Marriage/Divorce Certificate, Death Certificate, and Power of Attorney Certificate

If applicant is a renter, the following information must also be submitted by the property owner (landlord), for review:

- ☐ Completed and signed Landlord GEMS Financing Program Application with 2 years most recent Federal tax returns and personal financial statement.

Items from HGIA to Homeowner or Renter Applicant(s), Landlord and/or Contractor:

- ☐ **Missing Information Letter** (providing applicant 30 days to submit requested information); **OR**
- ☐ **Adverse Action Letter** to Applicant (applicant does not meet GEM\$ eligibility guidelines); **&**
- ☐ **Decline Notification to Contractor** (informing Contractor that Applicant does not meet Step 1 requirements); **OR**
- ☐ **Conditional Approval Letter** to Applicant, Landlord and Contractor

Step 2: Project Eligibility

Items required from Homeowner or Landlord and/or Contractor to HGIA:

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For Solar PV Installations:

- ☐ **Executed Sales Contract** or Addendum signed by contractor and Property Owner(s)
- ☐ **Contractor System Questionnaire in Banyan**, including:
 - ☐ System Cost (**may not exceed \$4.50/Watt**)
 - ☐ System Size
 - ☐ Inverter Size
 - ☐ Estimated Year 1 Production (**may not exceed annual historical kWh consumption from utility bill**)
 - ☐ Battery Cost
 - ☐ Battery size (kW, nameplate)
 - ☐ # of batteries
 - ☐ Equipment description (# panels, # inverters, make, model, monitoring equipment, etc.)
 - ☐ 10-year Workmanship Warranty
 - ☐ 20-year Manufacturer's Warranty
 - ☐ **NREL PV Watts Calculator** (<https://pvwatts.nrel.gov/>)
 - ☐ **PV Watts Calculator Certification** completed and executed by the Contractor (include an explanation if the tolerance exceeds +/- 10%)
- ☐ **Conditional Utility Interconnection Approval** – optional until Notice to Proceed (NTP)
- ☐ **For NEM+**, provide the following information on the existing solar PV system:
 - ☐ Year solar PV system Installed: _____
 - ☐ System Size: ____ kW

For Solar Thermal and Solar PV Hot Water Heaters:

- ☐ Determine if Homeowner or Landlord will utilize Hawaii Energy rebate to buy-down the cost of the installation or buy down their GEM\$ interest rate.
 - ☐ Apply rebate to Installation Cost.
 - ☐ Confirm receipt of Hawaii Energy Rebate Work Order # _____
 - ☐ Apply rebate to GEM\$ Interest Rate
- ☐ **Executed Sales Contract** or Addendum signed by contractor and Property Owner(s) to include:
 - ☐ 1-year Workmanship Warranty
 - ☐ 10-year Manufacturer's Warranty on Solar Hot Water panels and collectors
 - ☐ 6-year Manufacturer's Warranty on Hot Water Tank
 - ☐ Equipment description (panels, tank size, etc.)

Items from HGIA to Applicant(s) and/or Contractor:

- ☐ **Deny Letter** to Applicant and Contractor if HGIA is not able to finance the project.



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- **Revised Sales Contract** – with the breakdown of contractor discounts and/or down payment amounts, as applicable. The system size and estimated Year 1 production must remain the same as the original contract.

IMPORTANT NOTE: Post-approval changes (size, interconnection, production, etc.) will require re-evaluation and re-issuance of project approval or denial by HGIA

Step 3: On-Bill Obligation Approval

Items from HGIA to Applicant(s) and/or Contractor:

- ☐ **Final Approval Letter** to Applicant which provides terms and conditions of the approval, as well as the following program documents to be signed, notarized (if applicable) and returned within 30 days. The Contractor shall receive a “cc” of the Approval Letter.
- ☐ **Participant Agreement** – to be signed, initialed and dated where indicated by person or persons on HECO account and property owner(s).
- ☐ **Purchase Money Mortgage, Security Agreement and Fixture Filing¹** – to be signed in the presence of a Notary and notarized.
- ☐ **Request for Certificate of Insurance** – complete and signed by policy holder.
- ☐ **Trust self-attestation** emailed to dbedt.greenbank@hawaii.gov once program documents are received
- ☐ **Solar System Monitoring Authorization²** – to be signed by System Owner.
- ☐ **Solar Hot Water Maintenance Reserves Addendum³** – to be signed by the Applicant(s) and Property Owner(s).
- ☐ **Installation Completion Certificate and Customer Warranty** – for System Owner’s review.
- ☐ **Helpful energy and money savings tips** from HECO.

Oahu Participants can come in-person to our office to sign Program Documents. For neighbor island Participants, Program Documents will only be mailed or sent for e-signature.

Step 4: Notice to Proceed (**Required to begin installation**)

Upon receipt of executed Program Documents indicated above, HGIA will provide Contractor with:

- ☐ **Notice to Proceed** letter and **System Monitoring Access Authorization** to Contractor. The NTP provides six (6) months to complete the installation of the project.

Step 5: Progress Payment (as applicable).

For Contractors that selected the 50% - 50% Payment Option: Items required from Applicant(s) and/or Contractor to HGIA:

- ☐ Applicant’s **Certificate of Insurance** naming HGIA as Lender Loss Payee or Mortgagee.

¹ Only required for properties located in Land Court.

² Only required for Solar PV System installations (not solar hot water).

³ Maintenance Reserves may be an option for Customers installing solar thermal systems.



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☐ **Approved Building Permit.**

Upon receipt of the approved building permit and certificate of insured naming HGIA as Lender Loss Payee or Mortgagee, HGIA shall remit 50% of the amount financed (less contractor fees).

Step 6: Project Completion & Final Funding

Items required from Applicant(s) and/or Contractor to HGIA:

- ☐ Applicant's **Certificate of Insurance** naming HGIA as Lender Loss Payee or Mortgagee (if not earlier provided).
- ☐ **Closed Building Permit** (For City & County of Honolulu and Hawaii County)
- ☐ **Closed Electrical Permit** (For Maui County)
- ☐ Executed **Final Utility Interconnection Approval**
- ☐ Executed **Completion Certificate** signed by contractor and applicant(s)
- ☐ **Final Sales Contract**
(Note: If any changes to the Final Sales Contract, the project's eligibility will be reassessed)
- ☐ **System Monitoring Access**⁴ (for HGIA to monitor system production on an ongoing basis)
- ☐ **Executed Hawaii Energy Rebate Application**⁵

Upon receipt of all items above, HGIA will remit final ACH payment to Contractor.

⁴ Only required for Solar PV installations.

⁵ Only required for solar hot water installations.