



# Contractor Checklist

## Required documents & information for all projects

|  |   |
|--|---|
|  | <b>Customer Information</b> – Full name, address, email, phone number                                   |
|  | <b>Utility Provider</b>   |
|  | <b>Data Release Form</b> – Completed and signed* by the customer  |
|  | <b>Proposal / Contract</b> – Includes model number and customer signature*                              |
|  | <b>Heating Fuel Type</b> – Current heating fuel type and if a conversion, what is new fuel type?        |
|  | <b>Lender</b> – Identify which lender has pre-approved customer’s Smart-E Loan                          |
|  | <b>Additional Financing Source (if needed)</b> – Is customer using another loan in addition to Smart-E? |
|  | <b>Certificate of Completion**</b> – Signed* by contractor and the homeowner listed on loan             |

## Required documents & information for specific project types

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|--|
|  <b>Solar Projects</b>          |
| System Size (kW STC)   |
| Incentive approval (where applicable)  |
| Site plan  |
| One-line diagram   |
| Permission to operate**  |
|  <b>Energy Storage Projects</b> |
| One-Line Diagram   |
| Permission to Operate**  |

|  |
|--|
|  <b>HVAC Projects</b>       |
| AHRI Certificate or Spec Sheet   |
| Permit or Municipal Inspection Report**  |
|  <b>Windows Projects</b>    |
| Spec Sheet (must list U-Factor for each proposed window)   |
| Permit or signed final invoice**   |
|  <b>Insulation Projects</b> |
| R-Value of proposed insulation   |
| Permit or signed final invoice**   |

\*Ink or eSign accepted – typed signatures not accepted  
 \*\*Needed for project completion

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