

smart-e loan

Smart-E Contractor Checklist



✓	Required Documents & Information for All Projects
	Customer Information Full name, address, email, phone number
	Utility Provider
	Utility Release Form Completed and signed* by the customer
	Proposal / Contract Includes model number and customer signature*
	Heating Fuel Type Current heating fuel type & if a conversion, what is new fuel type?
	Lender Identify which lender has pre-approved customer's Smart-E Loan
	Additional Financing Source (if needed) Is customer using another loan in addition to Smart-E Loan?
	Certificate of Completion* Signed by contractor and the homeowner listed on loan
*ink or eSign accepted – typed signatures not accepted	

Required Documents for Specific Energy Project Types										
Solar Projects		Energy Storage Projects		HVAC Projects		Windows Projects		Insulation Projects		
										
	System Size <i>kW STC</i>		Reservation of Funds letter from Energy Storage Solutions		AHRI Certificate or Spec Sheet		Spec Sheet (must list U-Factor for each proposed window)		R-Value of proposed insulation	
	Approval Letter from Residential Renewable Energy Solutions Program		Energy Storage Solutions reservation #		Permit or Municipal Inspection Report**		Permit or Signed Final Invoice**		Permit or Signed Final Invoice**	
	Site Plan		One-Line Diagram	**needed for project completion						
	One-Line Diagram		Permission to Operate**							
	Permission to Operate**									

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 Required Documents for Resilience Project Types							
Septic Systems		Well Improvements/Repairs		Landscaping (planting native trees)		Floodproofing (Replace Impervious Surfaces)	
	Permission to Construct Permit (optional)		Well Construction Permit (where applicable)**		Tree Species, Age of Tree, Diameter		Sqft and type of surface installed/removed
	Permission to Discharge Permit**		Well Completion Report or Water Test (where applicable)**		Signed final invoice**		Permit or Signed Final Invoice**
** Needed for project completion							

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