

## Savings by Design Post-Installation Checklist

To streamline the post-construction review process, SDG&E is required to collect and utilize submittals and proof of installation documentation to validate estimated energy savings. Engineering review cannot begin without the following minimum information.

Please email [BusinessEnergySavings@sdge.com](mailto:BusinessEnergySavings@sdge.com) to request EDT access link. You will receive an emailed EDT link that will allow you to securely upload documents.

**Please also include Final Incremental Cost:** Documentation of the EEM baseline and proposed (or as-built) costs are required to verify the incremental cost of the overall project (Whole Building Approach) or individual measure (Systems Approach). If incremental costs are not available, SDG&E is able to estimate the costs of the upgrades; however, doing so may limit the approved incentive amounts.

Project Overview – All Projects	
Required	Final Building Drawings
Required	Final Building Specifications
Required	Current W9
Required	SB-1414 Documentation (Permits) – if project has Incentivized HVAC Systems
Required, if..	Final PV Plan Set if project has PV systems installed
Project Overview - All Whole Building Projects	
Required	As-Built Design Energy Model

Architectural Documents	Submit if...
Wall Insulation Submittal	Wall insulation measure adopted during project review
Roof Insulation Submittal	Roof insulation measure adopted during project review
Glazing Submittal (U-Factor, SHGC, VLT)	Project has Low-E Glazing
Cool Roof Submittal (Aged Reflectance, Emittance)	Project has a Cool Roof

Mechanical Documents	Submit if...
Mechanical Equipment Submittal	High Efficiency Split DX Units measure adopted during project review
Heating Hot Water Boiler	HHW Boiler measure adopted during project review
MECH-04A Form	Duct Seal Leakage Testing measure adopted during project review
Test and Balance Report	All whole building projects with Variable Air Volume Boxes

Electrical Documents	Submit if...
Electrical Contractor Certification Forms	Project with Lighting Controls Incentives over \$2,000
Interior Lighting Fixtures Submittals/Schedules	Reduced Lighting Power Density measure adopted during project review

Plumbing Documents	Submit if...
Domestic Hot Water Heater	High Efficiency Domestic Hot Water Heater measure adopted during project review

**Please Note:** If required information cannot be obtained, it must be stated why the information was unavailable and what steps were taken to correct the missing documentation issues.