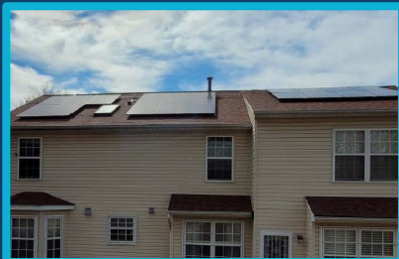
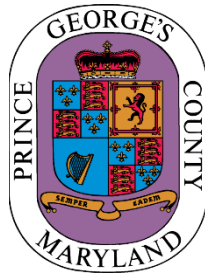


Prince George's County Clean Energy Program

Solar Energy Grant

Research Pilot

Request for Applications:



Department of the Environment

1801 McCormick Drive, Suite 500, Largo, MD 20774

(301) 883-5810 ♦ MyPGC.us/SustainableEnergy

Research Pilot Grant Disclaimer

Research Purpose: The Prince George's County, Department of the Environment (DoE), Solar Energy Grant has been modified for research purposes and will be conducted as a research pilot. Generally, it is recommended that homeowners pursue energy efficiency measures prior to acquiring rooftop solar¹. The first optional step of the program is to apply for our Energy Efficiency Grant and/or an Empower Maryland program. Both phases are aimed to improve the quality of life of recipients residing in one of nine designated neighborhoods*. The purpose of this research pilot is to determine if the updated eligibility requirements create higher quality solar installations, improved consumer protections, increased application submissions, and higher resident and contractor satisfaction with the overall grant. Each eligible recipient can receive up to \$10,000 for a rooftop solar system, and \$2,000 for a solar power outlet. All awards are expected to be issued in 2025 on a first come first serve basis.

Methodology: Historically, low application submissions contributed to this grant's moratorium, but as of 2025, there are plenty of new resources and incentives available for residents to pursue solar energy for their homes. It is recommended that prospective applicants provide proof of successful completion and implementation of energy efficiency measures through a comprehensive whole-house energy audit. Applicants must then meet all eligibility criteria listed on page 1.2. Using a random generator, DoE will contact previous Energy Efficiency Grant recipients to notify them of the pilot grant launch, but any resident that meets the eligibility requirements will be allowed to apply. Applications will be accepted on a rolling basis from *February 10, 2025, to August 15, 2025*. Deadline might be extended, depending on research progress. To ensure a variety of data will be received, each solar contractor is only allowed to receive up to \$50,000 worth of grant funding (i.e., 5 awards worth \$10,000 each). A limited number of awards will be available to eligible homeowners residing in the following Energy Resiliency Communities (ERC):

*ERC Neighborhood	Estimated Population	Population Percentage
Bladensburg - East Riverdale / Woodlawn - Lanham	115,788	31%
Forestville/ Suitland- Coral Hills	79,180	21%
Langley Park	45,559	12%
Hillcrest Heights- Marlow Heights	38,011	10%
Kentland- Palmer Park	37,601	10%
Oxon Hill- Glassmanor	28,472	8%
Silver Hill	27,241	7%
Total	371,852	100%

Note: Estimated population data is updated as of 2018. Population data compiled by M-NCPPC from census data and the American Block Survey. All data should be considered an estimation based on available data.

DoE will attempt to distribute the awards proportionately based on each ERC's population. Grant payment will only be issued to eligible recipients (pg. 1.2), after prequalification (pg. 1.4) and upon receipt of all properly submitted final documents (steps 1 through 5, pg. 1.1 – 1.7). Applicants must agree to work with DoE to facilitate site visits and collect other forms of documentation required by the grant program. **RECEIPT OF EMAIL NOTIFYING OF SOLAR GRANT PILOT DOES NOT GUARANTEE AWARD FUNDS. SYSTEMS INSTALLED PRIOR TO RECEIVING A PREQUALIFICATION NOTICE DO NOT QUALIFY. SEE PAGE 1.5 FOR DETAILS.**

Data Collection: Solar Grant awards will be issued on a first come first serve basis. Once awarded, data will be gathered based on received application information, and residents and contractors must complete our survey for feedback. The pilot program is designed to equitably give residents in ERCs an opportunity to participate in the program, while allowing DoE to assess:

- Contractor compatibility with grant requirements regarding online submissions, IT capabilities, warranty requirements, quality assurance measures, customer agreements, photo requirements and staff training
- The overall grant process to ensure it is comprehensible amongst county residents and contractors, and determine what type of assistance participants need throughout the process
- Outreach strategies and determine if there has been an increase in solar interest amongst county residents
- Administrative best practices and internal processes
- Industry changes regarding solar energy efficiency, including install rates, energy savings, and financing options

Analysis and Conclusion: This pilot will stop accepting applications once all awards have been distributed, or when enough data has been collected. Results from this pilot program will be used to further enhance and launch the official Solar Energy Grant, which should be open to all eligible residents. For questions regarding the research pilot, see our contact information below.

¹ Diana Chace, David Comis (2018). A Maryland Consumer's Guide to Solar. Clean Energy States Alliance; Maryland Energy Administration



Prince George's County Solar Photovoltaic (PV) Grant



Solar Panels



Clean
Energy



Bill Savings



Net Metering



Reduce
Carbon
Emissions



Support
Green
Jobs



Increase
Property Value

At A Glance

Program Summary:

This grant award, coupled with state energy incentives, provides assistance to eligible residents for accessing the benefits of solar photovoltaic (PV) energy.

Deadline:

Applications are accepted on a rolling basis from February 10, 2025, to August 15, 2025. Deadline may possibly be extended, but due to the limited number of awards, DoE recommends not to wait!

System Design Requirements:

Projected bill savings should be at least 10%, all major system components must be new, and the minimum solar PV system size is 2kWDC. Equipment and hardware installed must meet all current and applicable federal, state, and local regulations.

Eligible Project Locations:

The Energy Resiliency Communities (ERC) are Bladensburg - East Riverdale; Forestville; Hillcrest Heights - Marlow Heights; Kentland - Palmer Park; Oxon Hill - Glassmanor; Silver Hill; Suitland - Coral Hills; and Woodlawn- Lanham. To confirm you are in one of the ERC communities, you must use the ERC Address Locator: (<http://bit.ly/ERClocator>). Please note the ERC Address Locator is the definitive tool for determining the eligibility of an application.

Eligible Recipients, Property Types, and Maximum Rebate Amounts:

To be eligible you must be a Prince George's County resident and a PEPCO customer while living in a single-family house, townhouse residence, or condo-style home in which you own the roof. The residence must also be located in one of the designated ERCs (pg. 1.2). Review Step 2 for details on the following total maximum rebate amounts for each property:

- \$10,000 for homeowner owned solar PV systems
- \$2,000 for third-party owned solar PV systems
- \$2,000 to purchase and install a solar power outlet

Submit Your Application:

Application can be downloaded at MyPGC.us/SustainableEnergy. Submit an application by email, hand-delivering, or mailing to:

Contact:

Prince George's County, Department of the Environment,
Sustainable Energy
1801 McCormick Drive, Suite 500, Largo, MD 20774
Email: CleanE@co.pg.md.us | Phone: 301-883-5810



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Prince George's County Government
Department of the Environment (DoE)
Sustainable Energy
Clean Energy Grant
Solar Photovoltaic (PV) – Instructions



1.) Solar PV Grant Instructions - Overview

Thank you for your interest in the Prince George's County Clean Energy Program - Solar Photovoltaic (PV) Grant, administered by the Department of the Environment (DoE), Sustainable Energy. Prince George's County is working to improve the quality of life in nine designated neighborhoods, classified as *Energy Resiliency Communities* (ERCs), while identifying ways to improve service delivery throughout the county for all residents.

The ERC evolved from a county initiative, formerly known as Transforming Neighborhoods Initiative (TNI), which utilized several metric indicators such as education, public safety, and employment to identify key neighborhoods across the County needing holistic uplifting. From an energy perspective, resiliency is the ability to prepare for and adapt to utility disruptions and recover quickly from these disruptions. This involves the deployment of distributed energy resources such as energy efficiency, and renewable energy such as solar PV.

This grant award, coupled with state energy incentives, provides assistance to eligible residents for accessing the benefits of solar photovoltaic (PV) energy upon the successful implementation of energy-efficiency (electricity and natural gas) measures. Solar power has many benefits, but investing in it may not be for everyone. These instructions should help you decide if there's an approach that will work for you.

BENEFITS OF PARTICIPATING IN OUR SOLAR GRANT PROGRAM:

- If eligible, you can receive up to **\$10,000** for a solar PV system, and up to **\$2,000** for a solar power outlet.
- Based on estimated average rates, expect a reduction in your annual electricity costs by **at least 10%**.
- Increase your property value and energy resiliency against climate change.
- Support a healthier local environment by lowering your carbon footprint!

This grant builds on Maryland's and Prince George's County's energy-efficiency and carbon reduction goals and will help make our County more energy resilient, using a holistic approach to promote energy equity and reduce energy burden in disadvantaged communities.

5 STEP S.O.L.A.R. GRANT

1. **Scan for Eligibility** (*next page or scan QR Code*)
2. **Obtain Financial Assistance**
3. **Look for an Eligible Solar Contractor**
4. **Apply for Prequalification** (*before installing solar*)
5. **Return Final Documents** (*after installing solar*)



Scan me!

This document provides instructions for filling out the Clean Energy Program, Solar PV Grant application. If you have additional questions, please see the Clean Energy Program's contact information below to reach out to Department of the Environment (DOE) staff. Submission of an application for a grant award does not guarantee receipt of an incentive or the amount of the requested incentive. The Solar PV grant award operates on a first-come, first-served basis and incentive rebates are dependent upon cost effectiveness and funding availability. DoE Sustainable Energy does not endorse, sponsor, or otherwise make any representation or warranty with respect to any contractor, or the work, materials, or services provided by any contractor.

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Read these step-by-step instructions to better navigate a successful application submittal. Grant payment is a reimbursement, meaning payment will only be issued after all requested documents have been submitted properly. Note that systems installed prior to receiving a DoE Prequalification Notice do not qualify for this grant.

Step 1: CONFIRM YOUR ELIGIBILITY

TO QUALIFY FOR THE GRANT AWARD, HOMEOWNERS MUST:

- @ **Be a Prince George's County resident.**
- @ **Be a PEPCO customer as evidenced by a copy of recent (i.e., within 3 months) utility bill.**
 - Paper copies of the bills are typically mailed to the customer address on record. For PEPCO customers with internet access, account information is available via the PEPCO's account portal: <https://bit.ly/3b17pJK>
- @ **Live in a single-family house, townhouse residence, or a condo-style home in which you own the roof, in one of the following designated [Energy Resiliency Communities \(ERC\)](#).**
 - The ERCs are Bladensburg - East Riverdale; Forestville; Hillcrest Heights - Marlow Heights; Kentland - Palmer Park; Oxon Hill - Glassmanor; Silver Hill; Suitland - Coral Hills; and Woodlawn - Lanham. To confirm you are in one of the ERC communities, you must look up your address by using the ERC Address Locator: (<http://bit.ly/ERClocator>). Please note the ERC Address Locator is the definitive tool for determining the eligibility of an application.

HOME ENERGY ASSESSMENT

- It is generally recommended that homes receive a whole-house energy audit conducted by a certified professional when considering rooftop solar. For energy assessment incentives check out our [Energy Efficiency Grant](#), and [Empower Maryland](#) programs like [Pepco's Energy Assessments](#).

ONLINE SOLAR ASSESSMENT

- Before the next step, informally check to see if solar is even an option for the home by completing an online solar assessment. You can use PEPCO's Solar Calculator² for this:
<https://secure.pepco.com/MyGeneration/>
 1. Click link and sign into PEPCO account (optional).
 2. Enter the street address for the home getting solar and answer the questions.
 3. View the report and check to see if the roof's solar (sun) exposure is eligible for at least 2kW (kilowatts) of solar. For assistance, reach out to our office at 301-883-5810 or email CleanE@co.pg.md.us.

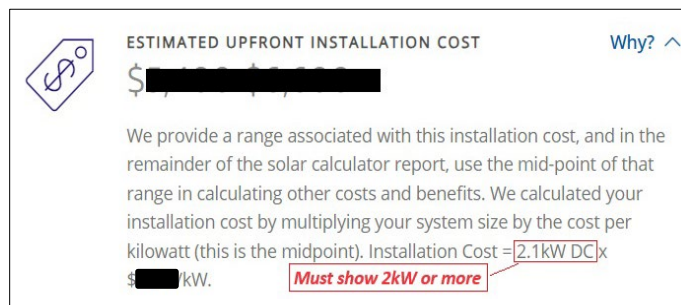


Figure 1: PEPCO's Solar Calculator Report - Ensure system size can be ≥ 2kW.

INELIGIBLE? CONSIDER COMMUNITY SOLAR!

- Subscribing to a community solar program would enable you to receive credits for part of the energy output of a local solar panel array. It's a great option if you can't—or don't want to—install solar panels on your home or business.
- For more details on how to subscribe to community solar: MyPGC.us/SustainableEnergy.

² The PEPCO® Solar Calculator is no substitute for an on-site assessment performed by a certified professional. It is an educational tool designed to indicate potential value and inform solar decisions. No calculator can capture every variable – and many of the variables in this calculator can change, including weather, pricing, and system configuration. The Department of Environment does not officially endorse this tool.

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Step 2: FINANCING OPTIONS & DETERMINE GRANT AMOUNT

The most popular financing and ownership options for solar homeowners fall into two basic categories:

- Homeowner owns the solar PV system through a loan or by cash purchase.
- Third-party (typically a company) owns the system by lease or purchase power agreement.

The grant amount depends on whether the system will be owned by the homeowner or a third-party:

1. For systems owned by the homeowner:

- Grant awards up to a maximum of **\$10,000** to cover eligible costs associated with installing a solar PV system.
- Additionally, grant awards up to **\$2,000** to purchase and install a solar power outlet in case of grid failure.

2. For third-party owned systems:

- Grant awards up to **\$2,000** to cover eligible costs associated with installing a solar PV system.
- Additionally, grant awards up to **\$2,000** to purchase and install a solar power outlet in case of grid failure.

ELIGIBLE COSTS

- The minimum system size that is eligible for the grant is 2kW.
- Eligible costs include any parts, component, or accessory equipment necessary to operate and/or install the device. ***A maximum of 15% of the grant award can be spent on reasonable measures to facilitate the installation of the system on a home (for example, tree trimming, health, and safety measures).*** Department of the Environment staff should be contacted to ensure the measure(s) qualifies.
- To improve the resiliency of the system during outages, a solar power outlet can be included in the scope of work. From an energy perspective, resiliency is the ability to prepare for and adapt to utility disruptions and recover quickly from these disruptions.

ADDITIONAL FINANCING RESOURCES³

As briefly mentioned above, a third-party owned system means once the system is installed, it is owned by someone else (typically a company). The resident or homeowner would then lease the panels through fixed monthly payments (solar lease), or buy the electricity generated by the panels (purchase power agreement). Depending on which financing/ownership model you select, you may qualify for additional incentives like:

- [Internal Revenue Service - Federal Residential Clean Energy Tax Credit](#)
- [Maryland Energy Administration - FY25 Maryland Solar Access Program](#)
- [Maryland Public Service Commission - Solar Renewable Energy Certifications](#)
- [PEPCO - Net Metering Credits](#)

³ For assistance with navigating financing options and other incentives, you can work with your solar contractor and check out our website: MyPGC.us/SustainableEnergy.

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Solar Photovoltaic (PV) – Instructions



Step 3: SELECT A CONTRACTOR

PLEASE NOTE: DoE Sustainable Energy does not endorse, sponsor, or otherwise make any representation or warranty with respect to any contractor, or the work, materials, or services provided by any contractor.

SELECT A SOLAR CONTRACTOR

- Residents can choose their own solar PV contractor to install their solar PV system. To qualify for this grant though, the contractor selected must meet the eligibility requirements listed under section *Contractor Eligibility Requirements* below. Check out our website for additional guidance on selecting a contractor: MyPGC.us/SustainableEnergy.
- DoE recommends that selected contractors meet with DoE Sustainable Energy staff, before submitting an application, for guidance on the grant process. See our contact information in the footnotes.

CONTRACTOR ELIGIBILITY REQUIREMENTS

- Solar PV Systems must be installed by an [appropriately licensed contractor](#)** in accordance with state (Maryland Department of Labor) and county laws. Self-installers are not eligible to receive rebates. All solar contractors must be licensed through the Maryland Home Improvement Commission ([MHIC](#)) and should provide a copy of their MHIC license. A copy of the [master electrician's license](#) who will connect the solar panels to an electric system must be provided as well.
- Proof of becoming a registered vendor of Prince George's County** from the Office of Procurement (i.e., successful registration email confirmation). If not already registered, any contractor can apply prior to submitting a grant application.
 - Registration ensures more secure and efficient transactions between solar companies/suppliers and the County. To begin, the vendor registration form can be found here: <https://erpvendorapp.sap.mypgc.us>.
 - If you have further questions about vendor registration, please contact Betty Nealy-Carter in the Office of Procurement at bcarter@co.pg.md.us
 - Note: This will require your business to be in [Good Standing](#) with the state, and a certificate of insurance.
- All selected solar PV contractors must have at least one person who is [NABCEP PV Installation Professional \(PVIP\) Certified](#)** and involved in the design and installation of the proposed project. A Site Supervisor should have completed at least 40 hours of solar PV technical course training.
- Customer References.** Upon customer or DoE request, provide three references and include the customer's name, address, phone number, email of three verifiable grid-connected solar electric projects, the system size (kilowatts), interconnection date, and the contractor's role for each reference.
- Contractors are to comply with Maryland Energy Administration's (MEA) Consumer Protection Policy** for the [Maryland Solar Access Program](#) (draft and final) as required by the 2024 Brighter Tomorrow Act (Chapter 595, 2024 Acts of Maryland).
- Provide a Standard Customer Agreement** that includes the consumer protection requirements listed under section [Customer Agreement Requirements](#) and [Warranty Requirements](#) of the application.
- Quality Assurance Plan.** A description that elaborates on how the contractor will ensure quality workmanship, and safety on each project. List of requirements for the plan is under section [Quality Assurance Plan](#) of the application.

For assistance with fulfilling all contractor requirements, check out our website for contractor resources:

MyPGC.us/SustainableEnergy

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Step 4: SUBMIT PREQUALIFICATION REQUIRED DOCUMENTS

Apply for the Solar PV Grant award and submit the required documents to the Department of the Environment, Sustainable Energy. It is recommended you have the contractor assist with this portion of the grant. Please note that these requirements are not in substitution of county vendor registration nor [Department of Permitting, Inspection and Enforcement \(DPiE\) permitting requirements](#). Systems installed prior to receiving a Prequalification Notice do not qualify for this grant.

Working along with the selected contractor, email CleanE@co.pg.md.us or send in copies of:

- ☐ **Solar Photovoltaic (PV) [Grant Application](#)** including the signed Grant Award Terms and Conditions Agreement, and the signed Affidavit of Income. Please note that supporting documents are required if applying to be income qualified for the grant award.
- ☐ **A copy of recent (within 3 months) PEPCO electricity bill for the property.**
- ☐ **(Optional) Proof of successful implementation of energy efficiency measures.**
 - There are several programs to help Marylanders make their homes more energy efficient.
 - Examples include the EmPOWER Maryland Programs - PEPCO's residential energy-efficiency incentives, Washington Gas Rebates Program, and Maryland DHCD's Low Income Energy Efficiency Program; Maryland's Department of Housing and Community Development (DHCD) WholeHome Programs - BeSMART Energy Efficiency Financing, Enhanced Weatherization Program, and the Rehab and Special Loan Programs.
 - Examples of proof of successful implementation of energy efficiency measures include:
 - A copy of the final project approval letter that indicates the incentives for the project.
 - A copy of the quality control inspection form that lists the work that was performed in the home.
- ☐ **IRS Form W-9: Request for Taxpayer Identification Number and Certification** which can be found: <https://www.irs.gov/pub/irs-pdf/fw9.pdf>. Whomever is receiving the grant award check is the party required to submit their W-9 form. For example, if selected contractor is to receive the check on behalf of the homeowner, then the homeowner does not have to submit a W-9.
- ☐ **Qualifications of the install and design team for proposed project, including:**
 - Proof of North American Board of Certified Energy Practitioners (NABCEP) PVIP Certification (if not already submitted previously) from professional involved in project.
 - Provide proof that personnel engaged in "electrical installations" as defined by the Local Authority Having Jurisdiction meets the definition of a "Qualified Person" and holds any credential required by the AHJ for performing such work.
 - Proof that site supervisor has completed at least 40 hours of safety and solar PV technical course training.
- ☐ **A solar PV analysis** that includes a detailed breakdown specifying the proposed system size, lifetime, yearly estimated output inclusive of degradation rates, lifetime avoided cost savings (projected bill savings included), shading report, and photos.
 - The report is to also indicate the solar PV project cost, minus all applicable incentives that are to be received as well as the SREC owner and estimated value. Annual electricity bill savings from install should be at least 10%
 - This grant may require additional information if analysis does not seem to meet grant requirements or may provide an exemption on specific data points if overall analysis seems adequate.
 - Visit our [website's](#) contractor resources for a photo documentation sample containing a complete list of required photos.
 - Analysis must also meet [System Design Requirements](#) listed under Grant Agreement.
- ☐ **A copy of the signed contract between homeowner and contractor, and itemized quote including scope of work.** Contract should be between the contractor and homeowner to install a solar photovoltaic system on the roof of the property. Details are listed under section [Customer Agreement Requirements](#). The itemized scope of work should include cost and system components.
- ☐ **Proof of executed financing contract** with financial partners, if applicable (loan, lease, PPA confirmation)

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Step 5: SUBMIT FINAL REQUIRED DOCUMENTS

FINAL APPROVAL

Working along with the selected contractor, email or send in copies of:

- ☐ **Final invoice** that itemizes all system component(s) installed. Included on the invoice should be the job completion date.
- ☐ **Copy of PEPCO's Authorization to Operate letter and interconnection agreement.**
- ☐ **Proof of all necessary permits, and a copy of the official inspection sticker** used by a [third-party solar inspector](#) participating in DPIE's Third Party Residential Solar System [Inspection Program](#).
 - Administered by the Department of Permitting, Inspection and Enforcement (DPIE), third party inspectors place inspection stickers on the electric panel box indicating that the system has successfully passed inspection.
- ☐ **Copy of close-out documents for the resident.** Should include, but limited to, an owner's manual, proof of all warranties, and as-builts. See section [System Design Requirements](#) and [Warranty Requirements](#).
- ☐ **Installation photos.** Visit [our website's](#) contractor resources section for a photo documentation sample, which contains a complete list of required photos and geotagging requirements.
- ☐ **Proof of system registration** with the Maryland Public Service Commission (PSC).
- ☐ Authorization for Electronic Funds Disbursement form for resident direct payments (if applicable).
- ☐ Completed survey for feedback on grant experience (if applicable).
- ☐ Proof of purchase and installation of the solar power outlet (if applicable).

GRANT PAYMENT WILL ONLY BE ISSUED UPON RECEIPT OF ALL PROPERLY SUBMITTED DOCUMENTS

IMPORTANT SOLAR NOTES:

- Solar PV system owners that are located on the District's and Maryland's cross border feeder serving the District can register with the District's PSC, others with the Maryland PSC.
- Registering your system with the respective PSC's is part of the process that allows the system owner to participate in the [Renewable Portfolio Standards \(RPS\)](#), and to subsequently sell Renewable Energy Credits (RECs). A REC is equal to the attributes associated with one (1) megawatt-hour (~1,000 kW) from a certified Renewable Energy Facility. RECs are tradable commodities in states with RPS markets. Visit the [Maryland PSC website](#) for more information.
- When your solar PV system is registered with the respective PSCs, it is assigned a certification number. The certification number will serve as proof that the installed system is certified as a renewable energy facility.
- Maryland's Renewable Portfolio Standard (RPS) serves to recognize and develop the benefits associated with a diverse collection of renewable energy supplies. To find out more, visit the Maryland PSC's website: <https://www.psc.state.md.us/electricity/renewable-energy/>
- For the Maryland PSC certification process go to: <http://www.psc.state.md.us/electricity/solar-renewable-portfolio-standard-documents-rps/>. For the DC PSC certification process go [here](#).
- For information on Solar Renewable Energy Certifications (SRECs) visit: <https://www.psc.state.md.us/electricity/solar-renewable-portfolio-standard-documents-rps/>

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ASSOCIATED ENERGY SAVINGS REQUIREMENT(S)

As a part of the Clean Energy Program, we expect contractors on behalf of the applicant to achieve at least a 10% annual energy savings for solar PV grant award applications. When the installed system sends more energy to the grid than PEPCO delivers, the applicant can receive net metering credits on their monthly electricity bill. The solar PV system should be designed to provide the homeowner at least 10% savings on their electricity bills by the end of each year.

- Requirement is based off of MEA's A Maryland Consumers Guide to Solar ([Appendix A](#)), and the U.S. Energy Information Administration's Residential Average Monthly Bill by Census Division, And State [data table](#).

FINAL APPROVAL TIMELINE:

It is the intent of the Clean Energy Program, Solar PV grant award to pay incentives in a timely manner after the administrator has received the applicant's completed application, the signed grant award letter, and approve his or her documentation. However, no guarantees of timing on incentive payments can or will be made.

Application Final Approval Timeline is as follows but we reserve the right to modify this timeline:

1. **Prequalification:** Upon receiving all the requirements and successful review of the full application, a notification of grant award will be sent out to the applicant within approximately **20 days**.
2. **Installation:** System install should be completed within **4 (four) months** of receiving prequalification approval notification. A complete installation is evidenced by PEPCO's Authorization to Operate letter. Applicant may request a one-time extension provided the total allowed timeframe is within 12 months of the prequalification approval notification. Please be advised the County is not required to grant an extension.
3. **Final Approval:** Final approval of application and satisfactory site visit should occur within **15 business days** of receipt of the final invoice. Final payment is subject to a satisfactory site visit and customer verification of the completion of work.
4. **Approval of invoices:** Upon submitting request for payment to the DoE Director, the Office of Finance intends to approve invoices within **30 business days**.

Please note: DoE Sustainable Energy does not endorse, sponsor, or otherwise make any representation or warranty with respect to any contractor, or the work, materials, or services provided by any contractor.

Applications may be emailed, hand-delivered or mailed to:

Prince George's County, Department of the Environment (DoE),
Sustainable Energy 1801 McCormick Drive, Suite 500, Largo, MD 20774
Email: CleanE@co.pg.md.us

For more information, call: 301-883-5810 or visit MyPGC.us/SustainableEnergy

Prince George's County Government
Department of the Environment (DoE)
Sustainable Energy
Clean Energy Grant
Solar Photovoltaic (PV) – Instructions



2.) Solar PV Grant Application - Overview

The Clean Energy Program, Solar Photovoltaic (PV) Grant joins ongoing efforts and programs created by Prince George's County to uplift nine designated neighborhoods, classified as *Energy Resiliency Communities* (ERCs), that face significant economic, health, public safety, and educational challenges. This grant award, coupled with state energy incentives, aids residents to access the benefits of solar photovoltaic energy upon the successful implementation of energy-efficiency measures. **Review the grant instructions and application, then:**

STEP 1. CONFIRM YOUR ELIGIBILITY

Homeowners applying for the grant award must:

- Be a Prince George's County resident.
- Be a PEPCO customer as evidenced by a copy of recent (i.e., within 3 months) utility bill.
- Live in a single-family residence, individually metered in one of the Energy Resiliency Communities (ERC).
- Verify adequate solar exposure for the house by completing an online solar assessment.

STEP 2. REVIEW FINANCING OPTIONS & DETERMINE GRANT AMOUNT

- \$10,000 for homeowner owned systems; \$2,000 for third-party owned; \$2,000 for a solar power outlet.

STEP 3. SELECT AN ELIGIBLE CONTRACTOR

- Solar PV systems must be installed by an appropriately licensed contractor.
- Contractor should show proof of becoming a registered vendor of Prince George's County.
- Contractor should have at least one person who is NABCEP PVIP Certified on the project.
- Contractor should be able to provide customer references upon request.
- Contractor should comply with MEA's Consumer Protection Policy for the MSAP.
- Contractor should provide a standard Customer Agreement to DoE, if applicable.
- Contractor should provide a Quality Assurance Plan.

For steps 4 and 5, work along with your selected contractor to email, or send in copies of requested documents.

STEP 4. SUBMIT REQUIRED DOCUMENTS FOR PREQUALIFICATION *(before installing solar)*

- Solar PV Grant Application (this document), including a signed Affidavit of Income, and Terms and Conditions.
- A copy of recent (within 3 months) PEPCO electricity bill for the property.
- Proof of successful implementation of energy efficiency measures (optional).
- IRS Form W-9.
- Qualifications of the installation and design team for proposed project (NABCEP, licenses etc).
- A solar PV analysis that includes a detailed breakdown specifying the proposed system.
- A copy of the signed contract between homeowner and contractor, and itemized quote including scope of work.

STEP 5. SUBMIT REQUIRED DOCUMENTS FOR FINAL APPROVAL *(after installing solar)*

- Final invoice.
- Copy of PEPCO's *Authorization to Operate* letter and interconnection agreement.
- A copy of the official inspection sticker and proof of permits.
- Copy of close-out documents for the resident.
- Requested installation photos.
- Proof of system registration with the Maryland Public Service Commission (PSC).
- Authorization for Electronic Funds Disbursement form for resident direct payments (if applicable).
- Completed survey for feedback on grant experience (if applicable)
- Proof of purchase and installation of the solar power outlet (if applicable).

Submission of an application for the grant award does not guarantee receipt of award. The County operates on a first-come, first-served basis and incentive rebates are dependent upon cost effectiveness and funding availability.

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AWARD AGREEMENT

All applicants (“Grant awardee”) who seek to claim incentives for eligible photovoltaic systems are required to acknowledge reading and understanding of the following terms and conditions and must accept these terms and conditions before the County processes their application and/or incentive payment. Incentives are only available for qualifying residents in the designated Energy Resiliency Communities (ERCs), who have successfully implemented efficiency measures on or after March 23rd, 2016 (when the Public Service Commission approved the PEPCO-Exelon Merger). To qualify to receive an incentive, you agree to install a solar energy system that meets the requirements set forth in all grant award-related documents.

CLARIFICATIONS ON ELIGIBILITY/PROCESS

1. Grant awardee understands that the grant award may be modified, suspended, or discontinued by the County at any time and without notice.
2. Grant awardee agrees to provide all documentation required to qualify for an incentive.
3. Grant awardee understands that incentives will be reserved and distributed on a first-come, first-served basis until funds are depleted for the applicable fiscal year.
4. Grant awardee understands that they should conduct themselves in a professional and respectful manner when interacting with customers and county program implementers.
5. Advertising, marketing, promotional business activities and sales routines carried out in person, in print, on television, telephone, radio, or on-line should be subject to the FTC Act’s prohibitions on “unfair or misleading behaviors or practices” and other sections of the FTC Act as relevant.
6. Contractors should frequently monitor the latest industry changes to ensure that sales teams are provided with the most accurate and updated information and ensure that all educational materials are regularly updated to reflect any updates.
7. Contractor should properly and fully present solar PV features and benefits to the customer so that the customer may make an informed decision about the program.
8. Grant awardee should comply with all county marketing and communications guidelines. Contractors should not use the county’s logo in promotions or advertising without the prior express written consent of the county.
9. Grant awardee may only apply for one solar photovoltaic system incentive that is funded with the County funds, for a single, unique, and verifiable physical address in a designated ERC.
10. A third-party owner is a system owner who does not own the qualifying building located in the ERC. They must apply the full grant award amount as prepayment to the total cost of the system. Prepayment is the deposit paid towards the cost of the system. This includes, but is not limited to, down payments, forward payments of expected fees/bills, or money used to establish a contract.
11. Completed installation: The County defines a completed installation as being all equipment necessary for the proper operation of a solar system having been safely and securely affixed to a

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permanent building, inter-tied into the building's electrical system, inspected and approved by the Department of Permitting, Inspections and Enforcement ("DPIE") as evidenced by an inspection approval sticker and by a copy of PEPCO's Authorization to Operate letter.

12. Incentives provided are for *complete* installation(s). Complete installation is evidenced by PEPCO's Authorization to Operate letter and DPIE inspection approval sticker.
13. Installation should be completed within four (4) months of receiving prequalification approval notification. Grant awardee may request a one-time extension subject to approval. The County is not required to grant an extension.
14. The grant awardee and selected contractor should comply with, apply for, and obtain all necessary permits from applicable regulatory agencies (federal, state, and local jurisdictions and utilities).
15. It is the grant awardee's responsibility to contract for the purchase and proper installation of a qualifying system. The County reserves the right to inspect all projects to verify completion.

PREQUALIFICATION TIMELINE

Note: The Solar PV Grant Application Approval Timeline is as follows but we reserve the right to modify this timeline:

- The County staff will send a notice of prequalification that reserves funds for the project within approximately **20 days upon receiving** the completed requirements, and after successfully reviewing required documents.
- Grant awardees will have two weeks to accept the grant award after receiving a notice of prequalification.
- Installation should be completed within **4 (four) months** of receiving prequalification approval notification. Applicant may request a one-time extension provided the total allowed timeframe is within 12 months of the prequalification approval notification. The County is not required to grant award an extension.

SYSTEM DESIGN REQUIREMENTS

Due to the highly technical language in the next few sections, it is recommended residents discuss these design requirements with their selected contractor. Only systems installed after Prequalification qualify for this grant. All systems supported through the grant award are subject to the following conditions:

- The minimum system size to qualify for a grant award is 2kWDC for solar PV.
- Only photovoltaic (PV) systems installed after the date this grant starts accepting applications are eligible.
- Grant program expects at least an average 70% Total Solar Resource Fraction across each array.
- The system will be developed to achieve optimal annual performance. The term 'optimal' will be evaluated based on customer advantages and cost savings, rather than solely on energy generation. For instance, a solar array facing south may generate higher total output, whereas an array facing west may produce more electricity during peak hours when rates are higher, resulting in greater customer benefits.
- All major system components (panels, inverters, and solar power outlets) must be new and not previously placed in service in any other location or for any other application. Rebuilt, refurbished, or relocated equipment are not eligible for a solar incentive.

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- The system cannot be removed from Prince George's County for a period of 10 years following installation. The County may request that all/or portion of the grant award be refunded if the system is removed.
- **As-builts and operations/maintenance/construction manuals** must be provided to resident after completion.
- See [Warranty Requirements](#) section for details on system and production warranties, and [Quality Assurance Plan](#) and [Equipment](#) sections for further requirements.

EQUIPMENT

1. To be eligible for an incentive, the photovoltaic system must meet the minimum size of 2.0 kWDC.
2. Grant awardee must comply with all grant award requirements and provide documentation acceptable to the County before an incentive will be fulfilled.
3. The equipment and hardware installed must meet all current and applicable federal, state, and local regulations for licenses, building codes, performance, and safety standards. This may include, but may not be limited to:
 - Underwriters Laboratories (UL) 1741 - Standard for Static Inverters and Charge Controllers for Use in Photovoltaic Systems.
 - UL 1703 Standard for Safety - Flat-Plate Photovoltaic Modules and Panels.
 - UL 61215-1 (listed to UL 61730-1) or their successor standards for photovoltaic modules.
 - UL 3703 or successor standard for photovoltaic mounting systems for solar trackers and clamping devices used as part of a grounding system.
 - Maryland Net Energy Metering laws and the requirements of the local electric utility – The Potomac Electric Power Company (PEPCO).
 - Institute of Electrical and Electronics Engineers ("IEEE") Standard 929-2000 - Recommended Practice for Utility Interface of Photovoltaic Systems
 - IEEE 1547 - Standard for Interconnecting Distributed Resources with Electric Power Systems with applicable requirements of the local electrical codes and the National Electrical Code (NEC).
 - Occupational Safety and Health Administration (OSHA) 29 CFR 1910.145 for labeling.
 - National Fire Protection Association (NFPA) 70, National Electric Code, Article 690, and all applicable Electrical Codes currently adopted and enforced under Prince George's County's Department of Permitting, Inspections and Enforcement.
4. Project installation team must reach out to the local electric utility and the County's Department of Permitting, Enforcement, and Inspection to ensure compliance with the most recent and all applicable codes and standards, including electric and fire codes.
5. Applying for and receiving incentives under this grant award does not preclude the grant awardee

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from seeking any federal tax credit for which he/she may be eligible. However, eligibility for an incentive does not guarantee eligibility for any tax credit.

APPLICATION REVIEW DETAILS

1. The selected solar PV contractors must have at least one person who is NABCEP PV Installation Professional (PVIP) Certified be involved in the design and installation of the solar panel installation. The review of the solar system will include the solar photovoltaic analysis and the Solar Renewable Energy Credits (SREC) ownership and value.
2. For a period of up to two (2) years after incentive fulfillment, grant awardee may be randomly selected to provide additional information to assist the County in documenting and validating actual benefits of the energy production and equipment. Grant awardee agrees to participate, and if selected, agrees that the incentive received is fair compensation and consideration for reasonable time and effort to participate.
3. Grant awardee agrees to permit public disclosure of information. The County requires transparency and public disclosure of how funds are managed, grant awarded, and spent. It is possible that information about how individual incentives were awarded and spent could be publicly disclosed in some manner, including disclosure on a government website, in a media report, or as a result of a request under the Freedom of Information Act. Grant awardee agrees to allow the County and/or its contracted representatives access to the incentivized system to verify that it is properly installed, operational, and conforms to the eligibility criteria as specified.
4. The system cannot be removed from Prince George's County for a period of 10 years following installation. The County may request that all/or portion of the grant award be refunded if the system is removed.

CUSTOMER AGREEMENT

- The customer agreement serves as a crucial document that defines the direct relationship between the contractor and the customer. As a prerequisite for participating in the program, contractors must adhere to the terms and conditions stipulated in the participation agreement. **Contractors or builders are strictly prohibited from signing on behalf of the customer.** If an electronic signature is used, it must include a signature verification report. Approved electronic signature tools include DocuSign, CudaSign, EchoSign, Adobe, and Seamless Doc. The customer agreement may be in the form of a purchase agreement or a lease/power purchase agreement. All customer agreements must be signed by both parties.
- Contractors are to comply with the [MEA Consumer Protection Policy for the Maryland Solar Access Program](#) (draft and final) as required by the 2024 Brighter Tomorrow Act (Chapter 595, 2024 Acts of Maryland). The Act specifically states, "*The consumer protection policy developed under Paragraph (1) of this subsection shall: (i) Include a disclosure form for solar energy power purchase agreements, solar energy lease agreements, and solar energy loan agreements that must be signed by an eligible customer-generator before entering into the agreement; (ii) For a solar energy power purchase agreement or a solar energy lease agreement, prohibit an annual rate increase of more than 3%; (iii) Allow a customer-generator to cancel an agreement entered into with a third party up to 30 days after signing the agreement; and (iv) platforms.*"
- Provisions for Contractor Agreements should include, but are not limited to:
 - **Installation Schedule:** A realistic timeline for installation and interconnection that considers DoE Sustainable Energy's and PEPCO's review timelines.
 - **Applicable Incentives:** The customer agreement should clearly state the total anticipated DoE

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Sustainable Energy incentive and ensure that all eligible incentives and warranties pass to the customer. Agreement should clarify who will receive credit for the Renewable Energy Certificates/Credits (RECs) that the system will generate.

- **Annual energy output:** Should include output in kilowatt-hours and summarize the results of the system loss analysis.
- **List of subcontractors:** If applicable, the contract should identify exactly who will be doing each part of the job, and who is responsible for warranties related to work performed by subcontractors.
- **Exact equipment to be installed:** Solar panels, inverter, manufacturer, model numbers etc.
- **Itemized budget:** Should include a detailed breakdown of equipment costs and other expenses such as installation labor and applicable permits etc.
- **Explanation and Estimate of Additional Costs:** Detailed information on additional costs incurred by the customer for system development, installation, operations and maintenance, commissioning, and a payment schedule if applicable.
- **Assignment of Responsibilities:** Clear assignment of responsibilities for obtaining permits, scheduling inspections, and meeting other regulatory requirements.
- **Maintenance:** Agreement should also include a long-term maintenance plan and designated responsible party, if any.
- If the customer agreement pertains to purchasing the system, it should additionally specify:
 - **Total system costs and itemized breakdown:** such as module costs, inverter costs, balance of system (including wires, racking, etc.), labor and overhead (including permitting), any roof replacement or repair costs, service panel upgrades (if required), and any other significant project components.
 - **System warranty** (see the *Warranty Requirements* in the next section)
- If the customer agreement is a lease or power purchase agreement (PPA), it should include the following:
 - **Total agreement cost and applicable incentives:** PPA or lease should clearly state the length of the lease, total estimated lease payments over the term of the lease, and the total amount of any approved incentives, including the DoE Sustainable Energy incentive.
 - **Production warranty** (see the *Warranty Requirements* in the next section)
 - **Other terms:** Responsibilities for costs related to the movement and reinstallation of the system or parts, including the terms governing these actions, as well as any insurance coverage pertaining to the system.
 - **Escalation rates or factors for a lease or PPA:** These should be clearly described in the agreement.

WARRANTY REQUIREMENTS

- A copy of all warranties must be provided to the homeowner and submitted as part of the final documents ([Step 5](#)). The contractor is responsible for furnishing the applicant and DoE SE with copies of the warranties. Contractors are to comply with all Warranty and Maintenance sections of the Maryland Energy Administration's (MEA) Consumer Protection Policy for the Maryland Solar Access Program

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(draft and final), as required by the 2024 Brighter Tomorrow Act (Chapter 595, 2024 Acts of Maryland).

- Provisions for warranties should also include, but are not limited to:
 - **Installation Warranty:** To protect the purchaser against defective workmanship, system, or component breakdown, or severe degradation, an installation workmanship warranty for systems should last for a minimum of 10 years. These warranties typically include coverage for any damage to the roof incurred during installation, if applicable. If system is third-party owned, it is encouraged that the warranty is transferable.
 - **Equipment Warranty:** Various components of the system, such as panels, inverters, and mounting equipment, may have different manufacturer warranty durations. Contractor is encouraged to recommend any changes necessary for an owner's property insurance policy as applicable. Equipment typically is installed with the minimum expected service life as follows: Inverters for 10 years, PV modules for 25 years.
- Recommended provisions (not required unless mentioned in MEA's Consumer Protection Policy) for warranties may include, but are not limited to:
 - **Warranty for Production:** This warranty may encompass all components of the generating system and, where applicable, protect against breakdown or degradation in electrical output. Panel performance will degrade over time, but solar panels should still be producing at least 80% of their original production by the end of the equipment warranty term. Most warranties expect the highest degradation (2-3%) within the first year because panels degrade at the highest rate when first exposed to solar radiation. After year one, manufacturers typically ensure that power output won't fall by more than 0.5 - 0.7% annually for the length of the warranty term. The contractor may commit to providing the customer with a production guarantee throughout the initial term of the agreement. This guarantee ensures compensation if the solar system produces less than the guaranteed output specified in the contract, lease or PPA agreement. It is encouraged that customers are not liable for any labor, repair, or replacement costs of defective components or systems throughout this initial term. If the customer sells the property housing the solar facility, the production guarantee should remain fully transferable to the new owner or lessee, adhering to the contract, lease or PPA agreement terms.

QUALITY ASSURANCE

Quality assurance management plans should encompass all aspects of the company's customer service policy and other quality assurance practices. Installations should be of industry standard with professional and skillful quality. Continuous failure to comply to quality or safety standards may result in probation, suspension or even termination from the grant program. Contractor, upon request of the county, and at no additional cost to the customer, should make reasonable repairs or corrections to work. Work that the contractor has performed must be brought up to program standards and repaired within a timely manner. Key components of a Quality Management Plan should include:

- **Roles, Responsibilities, and Quality Management Workflow:** Clearly defined roles and responsibilities related to quality management, including how issues identified during inspections are addressed. Workflow outlining the internal quality assurance process and who is responsible for overseeing it.
- **Defined Approved Equipment List:** Establishment of criteria and procedures for maintaining an

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Approved Equipment List, as per specified requirements.

- **Defined Contractor Qualification Requirements:** Criteria and procedures for qualifying contractors, ensuring they meet specified standards and qualifications.
- **Defined Inspection Protocol/Inspector Qualification:** Clear guidelines for inspection protocols, including qualifications required for inspectors. Reporting process for QA inspection photos and data.
- **Defined Design Requirements or Best Practices:** Specifications for design requirements or best practices to ensure quality in system design and installation.
- **Finance Provider's Installation Guidelines:** Detailed guidelines specifying quality standards for installation processes, which serve as a reference document.
- **Safety Policies:** Policies and procedures related to safety during installation, operation, and maintenance of the system. This may only be exempt if included in a separate Health Safety plan.
- **O&M Plan Requirements:** Requirements for an Operations and Maintenance (O&M) Plan, detailing procedures for ongoing system upkeep to maintain performance and longevity.
- **Standardized Equipment Recall Protocol:** Protocol for handling equipment recalls, ensuring prompt and effective response to identified issues with installed equipment.

Additionally, the contractor is responsible for developing and maintaining a health and safety program and manual that establishes appropriate regulations and procedures for workplace safety. This includes rules on reporting health and safety issues, injuries, and unsafe conditions, conducting risk assessments, and providing first aid and emergency response.

INDEMNIFICATION/NOTICES

1. Grant awardee should hold the County harmless from any and all claims, demands, and actions based upon or arising out of any purchases of goods or services performed by grant awardee or by grant awardee's agents.
2. Grant awardee agrees to assume all risks of loss and to indemnify and hold the County and its officers, agents, and employees, harmless from and against any and all liabilities, demands, claims, damages, suits, costs, fees, and expenses, incidents thereto, for injuries or death to persons and for loss of, damage to, or destruction of property because of grant awardee's negligence, intentional acts, or omissions. In the event of any demand or claim, the County may elect to defend any such demand or claim and will be entitled to be paid by grant awardee for all damages and legal fees.
3. Grant awardee agrees to comply with all applicable local, state, and federal electrical, plumbing, building, fire, and safety codes and regulations, including but not limited to obtaining plumbing, electrical, and building permits, observing zoning requirements, and consulting with neighbors or adjacent property owners as needed, as well as local, state, or federal safety and regulatory officials.
4. Grant awardee certifies that he or she, at all times, will be truthful in his or her representations, that no documentation of work or expenses will be altered, manufactured, or falsely represented, and that no incentive will be claimed in a manner or fashion that does not comply with grant

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award requirements.

5. Grant awardee assumes full risk and responsibility for all purchases of goods or services and agrees that Grant awardee is solely responsible for decisions to make purchases that might be eligible for an incentive.

PAYMENT

1. Grant awardee affirms that he or she understands and agrees to comply with equipment as well as all other eligibility standards and requirements.
2. The County operates on a first-come, first-served basis and incentive requests are dependent on funding availability.
3. Incentives are provided only after a full application and the signed Terms and Conditions from grant awardee have been approved by the County.
4. The incentive maximums per installation apply to a single, unique, and verifiable physical address. Grant awardee further certifies that he or she has not applied and will not apply for an incentive or incentives that would exceed the limits per installation by using multiple real or fictitious addresses, multiple real or fictitious grant awardee names, or by any other means or process.
5. It is the intent of the County to pay incentives after the agency has received the grant awardee's completed application and signed Terms and Conditions and approved his or her documentation. However, no guarantees of timing on incentive payments can or will be made.
6. Final payment may be subject to a satisfactory site visit and customer verification of the completion of work.

HOLISTIC TIMELINE FOR PROJECT COMPLETION

1. Upon receiving the completed prequalification requirements and after successfully reviewing required documents, the County staff will send a notice of prequalification that reserves funds for the project **within about 20 days**. Upon receiving all the requirements and after successful review of the full application, a notification of grant award will be proffered to the applicant.
2. Grant awardees will have two weeks to accept the grant award after receiving a notice of prequalification.
3. Installation should be completed **within 4 (four) months** of receiving prequalification approval notification. A complete installation is evidenced by PEPCO's *Authorization to Operate* letter. Applicant may request a one-time extension provided the total allowed timeframe is **within 12 months of the prequalification approval notification**. The County is not required to award an extension.
4. Final approval of application and satisfactory site visit will occur **within about 15 business days of receipt of final invoice**. Final payment is subject to a satisfactory site visit and grant awardee verification of the completion of work.
16. Upon submitting request for payment, the Office of Finance will approve invoices **within about 30 business days**.

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APPLICANT'S INFORMATION

PARTICIPANT CERTIFICATION

I hereby certify that I have read, understood, and agree to abide by the County's Award Agreement and Terms and Conditions. I understand that failure to abide by this agreement, and terms and conditions may lead to withholding or suspending, in whole or in part, funds provided under this grant award, or recovering unspent or misspent funds through the placement of a lien on my real and/or personal property to secure repayment.

By signing this application, the applicant certifies under penalty of perjury that the information provided in the application and all its attachments is complete, accurate, and true. The signatory further certifies that they are authorized to submit this application on behalf of the property, and, to agree to the terms and conditions.

Part A. AUTHORIZED APPLICANT

Authorized Applicant:	
Contractor/Vendor:	
Third-party Organization Name (if applicable):	
Date:	
Title:	
Name:	
Authorized Signature: Contractor/Vendor Signature*:	
<i>* To be completed only if the contractor/vendor completed the application.</i>	

Part B. PAYMENT INFORMATION

PAYMENT INFORMATION
<i>If the contractor or trade ally completing the work or another 3rd party will be receiving the incentive directly, the customer must authorize payment by signing below.</i>
Payment to: <input type="checkbox"/> Contractor/Trade Ally <input type="checkbox"/> Other 3rd Party Customer
Signature: _____
Contractor or 3 rd Party Name: _____
Date: _____

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APPLICANT INFORMATION

A.T.N

Applicant name/Property Owner:		SSN/Tax I.D.	
Street Address:			
City:	Zip Code:	Year Built:	
Daytime Phone:	Email:		
Do you own the property? <input type="checkbox"/> Yes <input type="checkbox"/> No		System Size in DC and AC (kW):	
Is the property classified as historic? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure		Estimated Roof Age (years):	
System Owner:			

CONTRACTOR INFORMATION

Solar System Contractor/ P.O.C./Installer:			
Contact Person:			
Company Address:			
Daytime Phone:			Email:
Primary Prince George's County License Type (e.g., Home Improvement, Business, Contractor):			
License Number:			
*Will workers on this project be paid wages at rates not less than those prevailing as determined by the "Davis-Bacon Act" (DBA)?		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	

SUBCONTRACTOR INFORMATION (if applicable)

Solar System Contractor/Installer:			
Contact Person:			
Company Address:			
Daytime Phone:			Email:
Primary Prince George's County License Type (e.g., Home Improvement, Business, Contractor):			
License Number:			
*Will workers on this project be paid wages at rates not less than those prevailing as determined by the "Davis-Bacon Act" (DBA)?		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	

Panel Size and Manufacturer:			
Inverter Type & Manufacturer:			
Solar Power Outlet Type & Manufacturer:			
Main Service Panel, Main Breaker Size:	Main Panel upgrade needed (Y/N?):		

** DBA wages are not required for this research pilot grant. This information is just for research purposes. Response is optional.*

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DETAILED INCENTIVE INFORMATION

List other incentives applied to the project. Attach additional sheets if necessary.			
<u>Incentive Program</u>	<u>Issuing Organization</u>	<u>Purpose</u>	<u>Incentive Amount</u>

List the costs for which you are seeking a grant award; the list should be supported by the scope of work.

<u>COST</u>	<u>AMOUNT REQUESTED</u>
<u>ACCESSORY EQUIPMENT, REASONABLE MEASURES, HEALTH/SAFETY COSTS ASSOCIATED WITH INSTALLING THE DEVICE.</u>	<u>AMOUNT REQUESTED</u>

Please note: DoE Sustainable Energy does not endorse, sponsor, or otherwise make any representation or warranty with respect to any contractor, or the work, materials, or services provided by any contractor.

Applications may be emailed, hand-delivered or mailed to:

Prince George's County, Department of the Environment, Sustainable
Energy 1801 McCormick Drive, Suite 500, Largo, MD 20774

Email: CleanE@co.pg.md.us

For more information, call: 301-883-5810 or visit MyPGC.us/SustainableEnergy

[Click here to download the W9 form](#)

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TERMS & CONDITIONS

COVID19 Participation Terms and Conditions
Department of the Environment, Sustainable Energy
Clean Energy Program

I. TERMS AND CONDITIONS	READ CAREFULLY AND SIGN
<p>APPLICATION: The Solar Energy Grant Research Pilot application, and all supporting documents, including the Terms and Conditions must be signed by the Contractor and Applicant to be valid. Applicant should review instructions, application agreement, and Terms and Conditions before signing. The program Terms and Conditions are subject to change at the sole discretion of Department of Environment, Sustainable Energy (DoE SE). By signing below, applicants affirm that the contents of the application corresponding to the instructions and award agreement above are true to the best of their knowledge, information, and belief; and that they have read and agreed to the terms outlined in this grant.</p> <p>GRANT AWARD AMOUNT: Applicants understand submitted application does not guarantee an award from the Solar Energy Grant, and that grants issued by Prince Georges County may be taxable. As the DoE SE is unable to give tax advice, applicant understands that any tax-related questions should be directed to a qualified tax professional. Grant funds disbursement will be contingent upon DoE SE acceptance and/or inspection of the equipment installed.</p> <p>For Solar PV Application:</p> <p>A. If system is owned by the homeowner:</p> <ul style="list-style-type: none"> ✓ Grant awards up to \$10,000 to cover eligible costs associated with installing a solar photovoltaic system. ✓ Grant awards up to \$2,000 to purchase and install a solar power outlet in case of grid failure. <p>B. For third-party owned systems:</p> <ul style="list-style-type: none"> ✓ Grant awards up to \$2,000 to cover eligible costs associated with installing a solar photovoltaic system. ✓ Grant awards up to \$2,000 to purchase and install a solar power outlet in case of grid failure. 	<p>ELIGIBILITY: The grant awards are valid for Pepco and/or Washington Gas customers living in a single-family, townhouse residence, or condominium that is individually metered (built before March 23, 2016), in one of the following designated Energy Resiliency Communities (ERC): Bladensburg - East Riverdale; Forestville; Hillcrest Heights - Marlow Heights; Kentland - Palmer Park; Oxon Hill – Glassmanor; Silver Hill; Suitland - Coral Hills; Langley Park; and Woodlawn – West Lanham. To confirm you are in one of the ERC communities, you must look up your address ensure it is within the boundary by using the ERC Address Locator. The ERC Address Locator is the definitive tool for determining the eligibility of an application.</p> <p>ENDORSEMENT & WARRANTY: DoE SE does not endorse, sponsor, or otherwise make any representation or warranty with respect to any contractor, or the work, materials, or services provided by any contractor. Applicant gives permission to DoE SE to use photos of completed work, and data presented in the prequalification or final submitted documents for marketing, publicity, and advertising purposes. This excludes any confidential information or trade secrets.</p> <p>APPROVAL, VERIFICATION & INSPECTION: Equipment may not be purchased or installed before receiving a prequalification notification. Grant funds will be reserved upon review and approval of the application. Prince George's County Government reserves the right to verify that all components in the work scope have been implemented in accordance with federal, state and county laws. In addition, applicants agree to work with DoE SE to facilitate site visits and collect other forms of documentation required by the grant program.</p>

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COVID19 Participation Terms and Conditions (cont.)

HEALTH AND SAFETY: Any health and safety issues identified during the audit must be resolved prior to an application being pre-approved by DoE SE.

CORONAVIRUS/COVID-19 LIABILITY AND INDEMNIFICATION: Applicant and Contractor each acknowledges the contagious nature of the Coronavirus/COVID-19 and that the CDC and many other public health authorities still recommend practicing social distancing. Applicant and Contractor each further acknowledges that Prince George's County has put in place preventive measures to reduce the spread of the Coronavirus/COVID-19. Applicant further acknowledges that his/her selected contractor and DoE SE cannot guarantee he/she will not be infected with the Coronavirus/COVID-19.

Contractor further acknowledges that DoE SE cannot guarantee he/she will not be infected with the Coronavirus/COVID-19.

Applicant understands the risk of becoming exposed to and/or infected by the Coronavirus/COVID-19 may result from the actions, omissions, or negligence of him/herself and others, including, but not limited to, the selected contractor staff, and other clients and families of the selected contractor.

Applicant agrees to voluntarily seek services provided by the selected contractor and acknowledge that he/she is increasing his/her risk to exposure to the Coronavirus/COVID-19.

Applicant and Contractor hereby release and agree to hold Prince George's County, its officials, employees and agents harmless from, and waive on behalf of him/herself, his/her heirs, and any personal representatives, any and all causes of action, claims, demands, damages, costs, expenses and compensation for damage or loss to him/herself and/or property that may be caused by any act, or failure to act by Applicant, the selected contractor, or that may otherwise arise in any way in connection with the audit and any services received from the selected contractor or provided to Applicant.

Applicant and Contractor understand that this release discharges Prince George's County, its officials, employees and agents from any liability or claim that it, he/she, his/her heirs, or any personal representatives may have against Prince George's County, its officials, employees and agents with respect to any bodily injury, illness, including COVID-19, death, medical treatment, or property damage that may arise from, or in connection to, the audit and any services received from the selected contractor or provided to the Applicant. This liability waiver and release extends to all owners, partners, and employees of the selected contractor and of the Applicant.

II. APPLICANT AND CONTRACTOR INFORMATION AND SIGNATURES

APPLICANT	CONTRACTOR
By signing this form, I agree to all the Terms and Conditions in this agreement	By signing this form, I agree to all the Terms and Conditions in this agreement
Customer Signature:	Contractor Signature:
Print Name:	Print Name:
Date:	Date:
Email:	Contractor's Name:
Pepco Account Number:	
Washington Gas Account Number:	

For questions about the grant application process and procedures, call our Office at 301-883-5810 or email CleanE@co.pg.md.us.

Energy Resiliency Community Clean Energy Grant

Prince George's County Government Department of the Environment (DoE) Sustainable Energy Division

Clean Energy Grant

Affidavit of Income

Any information you provide will be kept completely confidential. Please note the funding source for this grant requires we spend a certain portion of the funds with low and moderate income residents. Consequently, we are unable to determine compliance with this requirement without asking for income information.

Applicant's Name: _____

Full Address: _____

City, State, Zip: _____

Phone Number: (Primary) _____ (Secondary) _____ (Other) _____

Email Address: _____

I certify that there are [] persons living in the house and my/our annual gross income is \$_____.

I solemnly declare, under oath, and subject to the penalties of perjury, declare that the above information is true and correct to the best of my knowledge, information, and belief.

Signature of Affiant

Date

* Signature of Witness to the Affidavit

Date

Printed Name of Affiant

Date

* Printed Name of Witness to the Affidavit

Date

*The *Witness to the Affidavit* is a person witnessing the completion of this document, and need not be a notary public. For example, the contractor performing the energy retrofit service may sign as a witness.

**Request for Taxpayer
Identification Number and Certification**

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
requester. Do not
send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.)
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>	
	5 Address (number, street, and apt. or suite no.). See instructions.	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number											
				-				-			
or											
Employer identification number											
					-						

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person	Date

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid).
- Form 1099-DIV (dividends, including those from stocks or mutual funds).
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds).
- Form 1099-NEC (nonemployee compensation).
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers).
- Form 1099-S (proceeds from real estate transactions).
- Form 1099-K (merchant card and third-party network transactions).
- Form 1098 (home mortgage interest), 1098-E (student loan interest), and 1098-T (tuition).
- Form 1099-C (canceled debt).
- Form 1099-A (acquisition or abandonment of secured property).

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

Caution: If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);
2. Certify that you are not subject to backup withholding; or
3. Claim exemption from backup withholding if you are a U.S. exempt payee; and
4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and
5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441–1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called “backup withholding.” Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;
2. You do not certify your TIN when required (see the instructions for Part II for details);
3. The IRS tells the requester that you furnished an incorrect TIN;
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or
5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under “*By signing the filled-out form*” above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

• **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

• **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or “doing business as” (DBA) name on line 2.

• **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity’s name as shown on the entity’s tax return on line 1 and any business, trade, or DBA name on line 2.

• **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

• **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner’s name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For

example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner’s name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity’s name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or • Sole proprietorship	Individual/sole proprietor.
• LLC classified as a partnership for U.S. federal tax purposes or • LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	Limited liability company and enter the appropriate tax classification: P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys’ fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).

- 2—The United States or any of its agencies or instrumentalities.
- 3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- 5—A corporation.
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission.
- 8—A real estate investment trust.
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940.
- 10—A common trust fund operated by a bank under section 584(a).
- 11—A financial institution as defined under section 581.
- 12—A middleman known in the investment community as a nominee or custodian.
- 13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5. ²
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

¹ See Form 1099-MISC, Miscellaneous Information, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).

B—The United States or any of its agencies or instrumentalities.

C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(a).

J—A bank as defined in section 581.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 4947(a)(1).

M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/EIN. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

** For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Go to www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.