

Treasury 1603: Recommendations for Annual Report Production Documentation

The Annual Report is to verify property operation and energy production of the eligible energy property. Please take time to review this documentation prior to submitting your annual report. These recommendations are designed to assist you in completing Section 4.3 of the annual report. While these recommendations do not address all possible scenarios for a complete annual report, most applicants should find that reviewing these suggestions will minimize requests for additional documentation.

Note: *In Section 4 of the annual report, applicants must provide explanations for all significant variances in annual production and all significant interruptions of service.*

Recommended Supporting Documentation

For properties directly connected into a utility grid (Note: Only one form of documentation is required):

- Submit a recent statement from the utility documenting energy production. Please remember, the utility statement should be dated within the annual reporting year.
- Submit a dated printout or screen shot, in either tabular or graphical form, from the local monitoring system which documents energy production.
- Submit an inverter or net metering production reading. Many inverters and net meters have a digital display which indicates total energy production to date. If your inverter or net meter has this ability, provide a picture of this display or provide a listing of values from a log indicating date/time of each reading.

For properties not connected into a utility grid (solar thermal, solar lighting or geothermal heat pump):

- Submit a signed and dated report from the owner/lessee's management or authorized representative (e.g. property manager, commissioning agent, engineer, installer, etc.) attesting that the property is producing and operating as intended.

For biomass and combined heat and power properties:

- Submit data and calculations supporting percentage of fossil fuel use and energy efficiency, as reported.

This is for applicant use only and does not address all possible scenarios for a complete annual report. Please do not upload this list of recommendations. Ultimately, IRS rules and Treasury 1603 requirements apply.

See Program Guidance here: <http://www.treasury.gov/initiatives/recovery/Pages/1603.aspx> .