

Commercial Qualification Worksheet

*Energy Sentry · DAC***WHAT WE NEED TO QUALIFY & PRICE — THE 3 MUST-HAVES:**

1. 12 months of utility bills 2. the load list 3. photos of the meter and every panel

Submitted by: _____ Date: _____

Dealer: _____ Utility: _____

1 CUSTOMER & SITE

Building Name: _____

Site Address: _____

City, State, Zip: _____

Owned / Operated By: _____

Contact Person: _____

Phone: _____ Email: _____

Square footage: _____ # of buildings: _____

Occupancy schedule (when is it full vs. empty?): _____

Recent / planned additions (EV chargers, solar, new equipment): _____

2 UTILITY & BILLS

Rate plan / schedule name: _____

Utility account #: _____ Meter #: _____

Service size: _____ amps Phase: ☐ 1-Ph 120/240V ☐ 3-Ph 120/208V ☐ 3-Ph 277/480V ☐ Other

ATTACH: 12 months of utility bills (PDF, or a clear photo of every page).

If the meter supports it, also include a 60-minute interval-data export. The bills are what let us calculate the savings.

3 POWER MEASUREMENT ACCESS

☐ Current sensors can reach the three-phase mains at the main panel (MDP) ☐ Not sure

☐ There is wall space near the meter for a utility pulse (KYZ) box + isolation relay

Load List & Photos

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4 LOAD LIST

list every load 3 kW or larger you might control · rank by priority

COMMON LOADS TO LIST:

rooftop AC / RTUs · split-system condensers · air handlers · electric water heaters · electric heat / furnace strips
walk-in coolers & freezers · kitchen equipment · pool / well pumps · EV chargers · large motors & compressors

LOAD #	PRIORITY	LOAD / NAME & LOCATION	BREAKER SIZE (A)	PANEL #	# POLES	COMMENTS
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						

5 PHOTOS

Send a photo of each (just snap them on your phone):

- ☐ Meter & service entrance
- ☐ Main panel (MDP) open, breakers visible
- ☐ Every sub-panel schedule (the door label)
- ☐ Each controlled load's nameplate
- ☐ A spot near the MDP where a controller could mount

6 NOTES

anything unusual we should know

Occupancy, solar, planned changes, access issues, customer priorities, etc.
