

Disclosure Forms - Limited Exceptions to Account Holder as Signatory

Introduction

As stated in Section V of the Consumer Protection Handbook, “[t]he signatory on the Disclosure Form must be the holder of the relevant utility account, or, if the account holder is a company or organization, an individual authorized to sign on behalf of the account holder.” There are limited exceptions where the signatory on the Disclosure Form may vary from this requirement. These limited exceptions, along with clarifications on who should sign Disclosure Forms when the customer is a company or other organization, are outlined below.

Except in limited extenuating circumstances (such as the customer having a disability that physically prevents them from doing so), the customer should execute the wet or electronic signature on Disclosure Forms and contracts by physically signing a paper copy or typing or signing their name for an electronic signature. For example, an Approved Vendor or Designee should not have a business practice of sales agents executing written documents on behalf of customers, even with verbal consent.

| Form Type | Situation | Allowable Signatory on the Disclosure Form |
|-----------|---|---|
| DG | The utility account holder is a renter, and the building owner is the customer who is contracting for the solar project. | The Disclosure Form should be signed by the customer who signs the installation contract for the DG project. |
| DG | The building owner is the customer who is contracting for the solar project, but the utility account holder is a family member or spouse/partner. | The Disclosure Form should be signed by the customer who signs the installation contract for the DG project. |
| DG or CS | The customer (who is the utility account holder) is a corporation. | The signatory of the Disclosure Form would be an individual authorized to sign on behalf of the organization, such as the CFO or CEO. |
| DG or CS | The customer (who is the utility account holder) is a school. | The signatory of the Disclosure Form would be an individual authorized to sign on behalf of the school, such as the superintendent or the CFO of the school district. |