



# Required & Conditional Documents

## List and Definitions

The following is a full list of documents that may need to be provided to PG&E when applying for a building and renovation project.

- ▶ **Required Documents** are provided by the customer within the application, based on the project details entered.
- ▶ **Conditional Documents** are shown as optional in the application and may be requested by the assigned PG&E Representative during the Application & Intake phase of the project.

Document	What does it need to include?	Definition
<b>Building Floor Plan</b> <i>(bird's eye view)</i>	A building floor plan <u>needs to</u> display: <ul style="list-style-type: none"> <li>▪ Proposed/existing meter(s) location clearly marked</li> <li>▪ Shape of structure</li> <li>▪ Size of structure</li> <li>▪ Arrangement of rooms/doors in building</li> <li>▪ Scalable</li> </ul>	A building floor plan is a drawing that shows the shape, size, and arrangement of rooms in a building as viewed from above
<b>Building Permit</b>	A building permit <u>needs to</u> display: <ul style="list-style-type: none"> <li>▪ Municipality letterhead</li> <li>▪ Permit number</li> <li>▪ Project address</li> <li>▪ Project description</li> </ul>	A building permit is a document issued by a local government when an individual or company wants to build a new structure or engage in construction on an existing structure for expansion or repair.
<b>Civil/Utility Plans</b> <i>(bird's eye view)</i>	A civil/utility plan <u>needs to</u> display: <ul style="list-style-type: none"> <li>▪ Property lines</li> <li>▪ Proposed/existing meter(s) location clearly marked</li> <li>▪ All underground utilities located on/proposed on the property               <ul style="list-style-type: none"> <li>○ Electric</li> <li>○ Gas</li> <li>○ Wet facilities                   <ul style="list-style-type: none"> <li>• Water</li> <li>• Sewer/storm drain</li> <li>• Downspout</li> <li>• Irrigation</li> <li>• Bio-swells</li> </ul> </li> <li>○ Cable</li> </ul> </li> <li>▪ Scalable               <ul style="list-style-type: none"> <li>○ Scale bar</li> <li>○ Footage reference</li> </ul> </li> <li>▪ Street names</li> <li>▪ North arrow</li> <li>▪ Setbacks</li> <li>▪ Retaining walls</li> <li>▪ Wells</li> </ul>	A utility plan includes drawings and information for the placement of proposed/existing utilities such as fiber optic, electrical, gas, water, sewer, cable and other types of conduit.  Greenbook References •Section 2: Gas Service •Section 3: Underground Electric Service

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<b>Site Plan</b> <i>(bird's eye view)</i>	<p>A site plan <b><i>needs to</i></b> display:</p> <ul style="list-style-type: none"> <li>▪ Property lines</li> <li>▪ Proposed/existing meter(s) location clearly marked</li> <li>▪ <b><i>Underground requests</i></b> - all underground utilities located on/proposed on the property (in lieu of civil plan) <ul style="list-style-type: none"> <li>○ Electric</li> <li>○ Gas</li> <li>○ Wet facilities <ul style="list-style-type: none"> <li>• Water</li> <li>• Sewer/storm drain</li> <li>• Downspout</li> <li>• Irrigation</li> <li>• Bio-swells</li> </ul> </li> <li>○ Cable</li> </ul> </li> <li>▪ Scalable <ul style="list-style-type: none"> <li>○ Scale bar</li> <li>○ Footage reference</li> </ul> </li> <li>▪ Street names</li> <li>▪ North arrow</li> <li>▪ Setbacks</li> <li>▪ Retaining walls</li> <li>▪ Wells</li> </ul>	<p>A site plan is a view of the entire property. It should clearly show and dimension to scale all property lines, easements, setbacks, roads/streets, drainage away from the building, existing structures, proposed structures, retaining walls, water well(s), septic system(s), LP tank(s), streams, north arrow, scale, owner name, name of person preparing plans and project address. Additions and/or areas of remodel shall be shaded and/or cross hatched in relation to overall building.</p> <p><b>Greenbook References</b></p> <ul style="list-style-type: none"> <li>•Section 2.2: Set Requirements For Gas Meters</li> <li>•Section 7: Metering</li> </ul>
<b>Google Earth/Hand - drawn Site Plans – In lieu of Architect drawn Site Plan</b> <i>(bird's eye view)</i>	<p>A Google earth/hand drawn site plan <b><i>needs to</i></b> display:</p> <ul style="list-style-type: none"> <li>▪ Property lines</li> <li>▪ Proposed/existing meter(s) location clearly marked</li> <li>▪ Proposed/existing point of attachment</li> <li>▪ The closest PG&amp;E OH/UG facilities</li> <li>▪ <b><i>Underground requests</i></b> - all existing/proposed underground utilities located on the property (in lieu of civil plan) <ul style="list-style-type: none"> <li>○ Electric</li> <li>○ Gas</li> <li>○ Wet facilities <ul style="list-style-type: none"> <li>• Water</li> <li>• Sewer/storm drain</li> <li>• Downspout</li> <li>• Irrigation</li> <li>• Bio-swells</li> </ul> </li> <li>○ Cable</li> </ul> </li> <li>▪ Streets</li> <li>▪ North arrow</li> </ul>	<p>A Google earth or hand-drawn site plan is a scaled, bird's-eye view of the entire property, created either by printing a satellite image (such as from Google earth) or by hand drawing. This plan must clearly show all property lines, easements, setbacks, roads, drainage, existing and proposed structures, retaining walls, water wells, septic systems, LP tanks, streams, and the north arrow. It must also indicate the location of proposed and existing meters, points of attachment, and the nearest PG&amp;E overhead or underground facilities. For underground requests, all existing and proposed underground utilities on the property must be shown (in lieu of a civil plan). The plan should be legible, to scale, and include any additions or areas of remodel shaded or cross-hatched in relation to the overall building.</p> <p><b>Greenbook References</b></p> <ul style="list-style-type: none"> <li>•Section 2.2: Set Requirements For Gas Meters</li> <li>•Section 7: Metering</li> </ul>

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Switchboard Drawing	<p>A switchboard drawing <i>needs to</i> display:</p> <ul style="list-style-type: none"> <li>▪ Dimensions of equipment</li> </ul>	<p>Switchboards are free-standing units that are front connected and, like panelboards, require only front access. However, switchboards can allow for both front and rear access in some scenarios.</p> <p>Switchboards are required for all services 600A, three phase and greater.</p>
Panel Cutsheet	<p>A panel cutsheet <i>needs to</i> display:</p> <ul style="list-style-type: none"> <li>▪ New panels - <i>can be found on manufacturer website</i></li> <li>▪ Max rating of panel</li> <li>▪ Existing panels <i>Provide photo of existing and new, if applicable</i></li> <li>▪ Make sure numbers are visible</li> <li>▪ Not blurry</li> </ul>	<p>A cutsheet includes product images, product descriptions, manufacturer contact information, model numbers, product features, product benefits, product options, a range of technical specifications, performance data, certifications, reference standards, and sustainability information.</p> <p>Panelboards are typically flush-mounted or surface-mounted and are limited at PG&amp;E to a maximum of 600A, single phase.</p> <p><b>Greenbook References</b> • Section 7: Metering (Table 7-14)</p>
Environmental Permit	<p>An environmental permit <i>typically</i> displays:</p> <ul style="list-style-type: none"> <li>▪ Known environmental impacts</li> <li>▪ Mitigation monitoring and reporting <ul style="list-style-type: none"> <li>○ Aesthetics</li> <li>○ Air quality / Greenhouse Gases (GHG)</li> <li>○ Biological resources</li> <li>○ Cultural resources</li> <li>○ Geology and soils</li> <li>○ Hazards and hazardous materials</li> <li>○ Hydrology/water quality</li> <li>○ Noise</li> <li>○ Public service and utilities</li> <li>○ Traffic / transportation</li> </ul> </li> </ul>	<p>An environmental permit also known as an EIR (Environmental Impact Report) is a report of the effects, if any, which the proposed project, if carried out, would have on the environment</p>

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<b>Elevation Plan</b> <i>(Photos can be used for existing structures)</i>	An elevation plan <b><i>needs to</i></b> display: <ul style="list-style-type: none"> <li>▪ Proposed/existing meter(s) location clearly marked</li> <li>▪ Other utilities (needed for clearance confirmation)               <ul style="list-style-type: none"> <li>○ Gas/electric</li> <li>○ Wet facilities                   <ul style="list-style-type: none"> <li>• Water</li> <li>• Sewer/storm drain</li> <li>• Downspout</li> <li>• Irrigation</li> <li>• Bio-swells</li> </ul> </li> </ul> </li> <li>▪ Exterior building feature               <ul style="list-style-type: none"> <li>○ Windows</li> <li>○ Doors</li> <li>○ Vents</li> </ul> </li> </ul>	Show the elevations being changed. Show all exterior features such as the style of the building, doors, windows, decks, finishes, patios, chimneys, trims, etc.
<b>Authorization Joint Trench Construction Form B</b>	A Form B <b><i>needs to</i></b> display: <ul style="list-style-type: none"> <li>▪ Trench section</li> <li>▪ Length</li> <li>▪ Size</li> <li>▪ Surface</li> <li>▪ Trench cost</li> <li>▪ Breakdown of cost by trench occupant (PG&amp;E gas, PG&amp;E electric, AT&amp;T, Comcast, streetlight, etc.)</li> </ul>	Authorization joint trench construction (Form B) is a billing breakdown prepared at the applicant's expense by either the applicant or PG&E in conjunction with the composite drawings for the various trench occupants by footage.  <b>Greenbook References</b> <ul style="list-style-type: none"> <li>• Section 2.3.5: Joint Trench Service</li> <li>• Section 3: Underground Electric Service</li> </ul>
<b>Grading Plan</b>	A grading plan <b><i>needs to</i></b> display: <ul style="list-style-type: none"> <li>▪ Grade changes (hills)</li> </ul>	A grading plan is a topographical plan that shows the existing land conditions, including existing elevations, drainage, structures and natural objects, and proposed elevations, drainage, structures and natural objects.
<b>Joint Trench Intent</b>	A joint trench intent <b><i>needs to</i></b> display: <ul style="list-style-type: none"> <li>▪ Proposed/existing service line &amp; meter(s) location clearly marked</li> <li>▪ Other utilities (needed for clearance confirmation)               <ul style="list-style-type: none"> <li>○ Gas/electric</li> <li>○ Wet facilities                   <ul style="list-style-type: none"> <li>• Water</li> <li>• Sewer/storm drain</li> <li>• Downspout</li> <li>• Irrigation</li> <li>• Bio-swells</li> </ul> </li> </ul> </li> </ul>	A proposed trench path along with other utilities in said trench.  A joint trench intent can contain gas and electric, or gas, electric and communications, or any combination of multiple utilities.  <b>Greenbook References</b> <ul style="list-style-type: none"> <li>• Section 2.3.5: Joint Trench Service</li> <li>• Section 3: Underground Electric Service</li> </ul>

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<b>Landscaping Plan</b>	<p>A landscaping plan <i>needs to</i> display:</p> <ul style="list-style-type: none"><li>▪ Proposed/existing vegetation</li><li>▪ Bio-swell</li><li>▪ Retaining walls</li></ul>	<p>Landscape plans are a set of technical drawings used to communicate the construction and design created by a landscape architect or a team of architects. They include natural elements like trees and grass, along with man-made elements like sheds and furniture, to provide a proper layout of the space.</p>
<b>Load Sheet</b>	<p>An electric load sheet <i>needs to</i> indicate:</p> <ul style="list-style-type: none"><li>▪ Project number</li><li>▪ Project address</li><li>▪ Business name, if applicable</li><li>▪ Date</li><li>▪ Number of units with identical loads</li><li>▪ Number of new/existing meters</li><li>▪ Phase</li><li>▪ Voltage</li><li>▪ Panel size</li><li>▪ Square footage of the building</li><li>▪ Loads (lighting and receptacles should always be completed)</li></ul> <p>A gas load sheet <i>needs to</i> indicate:</p> <ul style="list-style-type: none"><li>▪ Project number</li><li>▪ Project address</li><li>▪ Business name, if applicable</li><li>▪ Date</li><li>▪ Number of units with identical loads</li><li>▪ Number of new/existing meters</li><li>▪ Delivery pressure</li><li>▪ Loads</li></ul>	<p>A load sheet is a document used during utility planning and design to show a customer's anticipated electrical or gas load, assisting engineers in determining whether existing infrastructure can support it.</p>
<b>Motor Data Sheet</b>	<p>A motor data sheet <i>needs to</i> display:</p> <ul style="list-style-type: none"><li>▪ Make</li><li>▪ Model</li><li>▪ Horsepower</li><li>▪ Code</li></ul>	<p>A motor data sheet is a document that contains important information about a motor, such as its specifications, performance characteristics, and electrical connections. It is important because it provides essential information for selecting, installing, and operating a motor. This data could also be found on the appliance rating plate.</p>

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<b>Panel Schedule</b>	<p>A panel schedule <i>typically</i> displays:</p> <ul style="list-style-type: none"> <li>▪ Voltage</li> <li>▪ Phase</li> <li>▪ Ampacity</li> <li>▪ Connected load</li> <li>▪ Demand load - National Electric Code (NEC)</li> <li>▪ Circuit number</li> <li>▪ Use/description</li> <li>▪ Conductor size</li> </ul>	A panel schedule presents an organized layout, a detailed chart encompassing each electrical panel's configurations within a particular facility or building project.
<b>Assessor's Parcel Map</b>	<p>A parcel map <i>often</i> displays:</p> <ul style="list-style-type: none"> <li>▪ Parcel numbers</li> <li>▪ Parcel and lot boundaries</li> <li>▪ Recorded dimension</li> <li>▪ Acreage</li> <li>▪ Street address</li> <li>▪ Street width</li> <li>▪ Recorded map information is also visible</li> </ul>	A "parcel map" is a land division map used for developments of four (4) or fewer residential lots. Recorded by the local assessor's department.
<b>Photo(s)</b>	<p>Electric photo(s):</p> <ul style="list-style-type: none"> <li>▪ Meter up-close</li> <li>▪ Panel 10-15 ft back</li> <li>▪ Main breaker</li> <li>▪ Panel rating sticker (if available)</li> <li>▪ Weatherhead - <i>overhead only</i></li> <li>▪ Proposed panel location</li> <li>▪ Service span - weather head to PG&amp;E transformer/ service pole - <i>overhead only</i></li> </ul> <p>Gas photo(s):</p> <ul style="list-style-type: none"> <li>▪ Meter up-close</li> <li>▪ Meter 10-15 ft back</li> <li>▪ A photo of the manifold, indicating unit</li> </ul>	
<b>Plumbing Plan</b>	<p>A plumbing plan <i>typically</i> displays:</p> <ul style="list-style-type: none"> <li>▪ Water supply pipes</li> <li>▪ Sewer laterals</li> <li>▪ Vents</li> <li>▪ Gas piping (customer owned)</li> </ul>	A plumbing plan identifies size and location of all plumbing fixtures, water and gas supply piping sizes and materials for all fixtures and appliances.

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Document	What does it need to include?	Definition
Single Line Diagram	<p>A single line diagram <i>needs to</i> display:</p> <ul style="list-style-type: none"> <li>▪ Circuit breakers</li> <li>▪ Voltage &amp; phase</li> <li>▪ Meter labeled</li> <li>▪ Sub panel labeled</li> </ul> <p>A single line diagram <i>typically</i> also displays:</p> <ul style="list-style-type: none"> <li>▪ Transformers</li> <li>▪ Capacitors</li> <li>▪ Conductors</li> </ul>	<p>A single line diagram (SLD), also sometimes called a one line diagram, is a simple symbolic representation of an electric power system.</p>
Site Improvement Plan	<p>A site improvement plan <i>typically</i> displays:</p> <ul style="list-style-type: none"> <li>▪ Roads</li> <li>▪ Sidewalks</li> </ul>	<p>A site improvement plan could show any of the following work on property:</p> <ul style="list-style-type: none"> <li>▪ Demolition or removal of improvements, trees, or other vegetation</li> <li>▪ Drilling test holes</li> <li>▪ Grading, filling, or otherwise improving the property or a street, highway, or sidewalk in front of or adjoining the property.</li> </ul>
Soils Test	<p>A soils test <i>needs to</i> display:</p> <ul style="list-style-type: none"> <li>▪ Information regarding soil corrosivity</li> </ul>	<p>A soils test – an analysis with foundation design criteria (foundation type, soil load limits, etc.) – May be required for all new structures.</p>
Streetlight/Traffic Signal Plan	<p>A streetlight/traffic signal plan <i>needs to</i> display:</p> <ul style="list-style-type: none"> <li>▪ Number of lights impacted</li> <li>▪ Metered or unmetered service</li> <li>▪ Location of streetlight controller</li> <li>▪ Requested rate (LS1, LS2, OL1, TC1, etc.)</li> </ul>	<p>A streetlight can be free standing or attached to an existing PG&amp;E pole and is typically used for illuminating public roads.</p> <p>A traffic signal plan illustrates the existing or proposed traffic controller location and position, and characteristics of all associated lights.</p>
Tract Map	<p>A tract map <i>often</i> displays:</p> <ul style="list-style-type: none"> <li>▪ Parcel numbers</li> <li>▪ Parcel and lot boundaries</li> <li>▪ Recorded dimension</li> <li>▪ Acreage</li> <li>▪ Street address</li> <li>▪ Street width</li> <li>▪ Recorded map information is also visible</li> </ul>	<p>Subdivision maps or tract maps are used in planned developments with four or more lots to show the boundaries and location of each lot and the common areas.</p>

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Information	What we need to know	Definition
<b>Trenching</b>	Customer will need to state who is completing the digging in franchise area vs. on private property. Customer is allowed to split the work between contractor and PG&E.	<p>A trench is defined as a narrow excavation (in relation to its length) made below the surface of the ground.</p> <p><b>Greenbook References</b></p> <ul style="list-style-type: none"><li>• Section 2.3.5: Joint Trench Service</li><li>• Section 3: Underground Electric Service</li></ul>