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Electric

## Frequently Asked Questions: New Property Owner Assumption Process

### **Q: I have purchased or sold a property with a rooftop PV system on it. What do I need to do?**

A: The new property owner needs to submit an amendment to the approved agreement in the Customer Interconnection Tool (CIT), along with a copy of the signed, recorded deed, a Certificate of Insurance, and a copy of the lease transfer agreement (if applicable). A [CIT guide](#) and [amendment overview](#) are available on our [website](#).

### **Q: What is the purpose of this amendment to the agreement? Why is it necessary?**

A: A rooftop PV system is a small electric generation facility. The primary difference from its utility counterpart is its size, and all generation facilities are required to enter into contractual agreements to tie into the grid. These agreements outline the rights and responsibilities of each party. The property owner is the customer-generator in this context, and when that owner changes the agreement needs to reflect those changes.

This can be done through an amendment process.

### **Q: How do I complete and submit an amendment in the CIT to assume an existing agreement?**

A: Refer to Attachment A.

### **Q: What confirmation will I receive that my amendment to assume an existing agreement has been accepted?**

A: When the amendment is received and processed, you will receive a document for electronic signature. Once signed, the amendment will be executed by the utility.

### **Q: What's the difference between signing a new agreement and assuming an existing agreement?**

A: The terms and conditions of each agreement do not change when a property changes hands, only the name on the agreement. A new agreement is a lengthier process that can be very time consuming and difficult to complete if the system is leased by a third-party. Third party agreements require all parties to sign, and we've had many situations where customers have found it difficult to obtain a signature from their leasing company, particularly those that don't maintain a presence on the island where the system is located. With an amendment, the new property owner agrees to assume all the rights and responsibilities of the agreement from the old property owner, but the agreement itself doesn't change. The name and contact information are updated in our system and the new property owner is considered in good standing and compliant with the program agreement. The amendment doesn't require the signature of the leasing company if the leasing company is unchanged or if the new owner bought out the lease through the purchase of the property. We do require the appropriate documentation to be included with the form so that we keep our records current.

### **Q: If the name of the previous property owner stays on the agreement, does that mean they are still liable under the contract?**

A: No. Once the amendment is processed and our records updated, they no longer have any liability under the agreement because their rights and responsibilities have been assumed by the new property owner.



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**Q: What if I want to complete a new agreement instead of assuming the old agreement?**

A: Please contact us for assistance.

**Q: How can I obtain a copy of the agreement?**

A: When you send in the assumption form, we will send you a confirmation of the assumption with your Project ID for your records.

**Q: I'm a real estate agent. Can this amendment be included as part of the closing process?**

A: Yes, in fact we encourage you to do so! Simply work with the new property owner to submit the amendment with all required supporting documents in CIT.

**Q: What if I don't want to assume the agreement for this PV system?**

A: If you choose not to assume a program agreement from the previous owner, your system will be deemed non-compliant and must either be turned off or removed from the property.

**Q: What if I want to make changes to this system or switch programs?**

A: Changes to property ownership can be submitted as part of other amendments. Please work with your solar contractor to submit the amendment in CIT to cover the change in ownership and any program or equipment changes.

**Q: What attachments do I have to send in with my form?**

A: It depends on the situation. We need a copy of the signed, recorded deed that shows you're the new owner if the property has been recently purchased. We need to verify ownership and it usually takes the counties several weeks to update their information online. We need a Certificate of Insurance that demonstrates compliance with program requirements if applicable (see below for more information) and, if the system is leased, we need a signed copy of either the lease transfer agreement or lease buyout agreement.

**Q: What are the insurance requirements?**

A: Here's the language as it appears in tariff and the agreement:

*The following insurance provisions are only applicable to Generating Facilities with a Total Rated Capacity greater than 10 kW but not exceeding 100 kW: The Customer-Generator shall, at its own expense and during the term of the Agreement and any other time that the Generating Facility is interconnected with the Company's system, maintain in effect with a responsible insurance company authorized to do insurance business in Hawaii, the following insurance or its equivalent at Company's discretion that will protect the Customer-Generator and the Company with respect to the Generating Facility, the Generating Facility's operations, and the Generating Facility's interconnection with the Company's system: A commercial general liability policy, covering bodily injury and property damage combined single limit of at least the following amounts based on the Total Rated Capacity of the generator (for solar systems—Total Rated Capacity of the generator or inverter, whichever is lower, can be used with appropriate technical documentation on inverter, if not higher Total Rated Capacity will be used), for any occurrence.*



*Commercial General Liability Coverage Amount Total Rated Capacity of the Generating Facility*

*\$1,000,000 Greater than 30 kW and less than or equal to 100 kW*

*\$500,000 Greater than 10 kW and less than or equal to 30 kW*

*The Customer-Generator has responsibility to determine if higher limits are desired and purchased. Said insurance shall name the Company, its directors, officers, agents, and employees as additional insureds, shall include contractual liability coverage for written Agreements and agreements including this Agreement, and shall include provisions stating that the insurance will respond to claims or suits by additional insureds against the Customer-Generator or any other insured thereunder. Customer-Generator shall immediately provide written notice to the Company should the required insurance be cancelled, limited in scope, or not renewed upon expiration.*

*"Claims made" policies are not acceptable, unless the Customer-Generator agrees to maintain coverage in full effect at all times during the term of this Agreement and for THREE (3) years thereafter. The adequacy of the coverage afforded by the required insurance shall be subject to review by the Company from time to time, and if it appears in such review that risk exposures require an increase in the coverages and/or limits of this insurance, the Customer-Generator shall make such increase to that extent and any increased costs shall be borne by the Customer-Generator. The insurance required hereunder shall provide that it is primary with respect to the Customer-Generator and the Company. The Customer-Generator shall provide evidence of such insurance, including insurer's acknowledgement that coverage applies with respect to this Agreement, by providing certificates of insurance to the Company within 30 days of any change. Initially, certificates of insurance must be provided to the Company prior to executing the Agreement and any parallel interconnection. The Customer-Generator's indemnity and other obligations shall not be limited by the foregoing insurance requirements. Any deductible shall be the responsibility of the Customer-Generator. Alternatively, where the Customer-Generator is a governmental entity, Customer Generator may elect to be self-insured for the amounts set forth above in lieu of obtaining insurance coverage to those levels from an insurance company.*

**Contact us if you have additional questions:**

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## ATTACHMENT A

1. Click on Start New Renewable Energy Program Application.

The screenshot shows the Hawaiian Electric Customer Interconnection Tool. At the top, there's a navigation bar with the Hawaiian Electric logo, a Home button, and an Applications button. Below the navigation bar, the page title is "Welcome to the Customer Interconnection Tool". Underneath the title, there's a section titled "This portal allows you to:" followed by a list of four items: 1. Submit new applications. [View Available Applications >](#), 2. View saved and submitted projects., 3. View Project Reports., 4. Manage account details. Below this, there's a section titled "Technical Notes:" with two bullet points: • Please do not use the browser's Back/Forward buttons to navigate the site. • If you return to a previously-submitted page and make changes, you must resubmit the form. At the bottom of the page, there are two buttons: "Start a New Renewable Energy Program Application" (which is highlighted with a red border) and "Start a New Electrical Service Application".

2. Select AMEND for Program Type.

The screenshot shows the "Apply for Interconnection" application form. The top header is "Apply for Interconnection". Below the header is a navigation bar with seven steps: Program Type, Project Location, Contact Information, System Type, Project System Components, Additional Information & Drawings, and Application Summary. The "Program Type" step is currently selected. In the "Program Type" section, there's a dropdown menu labeled "What type of application are you interested in? \*". The dropdown contains the option "AMEND". Below the dropdown, there's a section titled "APPLICATION REQUIREMENTS" with a note: "Below is a list of items and information that may be needed during your application process:". There's also a link "Expand for more Information >". A bulleted list of requirements follows:

- PV system lease transfer or buyout documents (For amendments where the system ownership is changing or transferring)
- Detailed information about proposed system equipment being removed (i.e. manufacturer(s), model numbers, rated electrical capacity, and the design, usage, and components of any energy storage) (for amendments where equipment is being removed or replaced)
- Proof of application for PV system building permit (for Battery Bonus applications)
- Designation of incentive recipient (for Battery Bonus applications)
- A system owner is required for all Battery Bonus Applications. This individual or company will be the incentive recipient, and should match the submitted W9.



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3. Enter Meter Number, Zip Code and Tax Map Key Number.

Program Type	Project Location	Contact Information	System Type	Amend Components	Additional Information & Drawings	Application Summary
<b>Project Location</b>						
Please enter both a meter number and matching zip code. The service address will be automatically populated.						
Meter Number *	<input type="text"/>	Enter	Zip Code *	<input type="text"/>	Enter	
Service Address	<input type="text"/>	Enter	Unit	<input type="text"/>	Enter	
City	<input type="text"/>	Enter	State	<input type="text"/>	Please select	▼
Tax Map Key Number *	<input type="text"/>	Enter	<b>Additional Tax Map Key</b>			
<input type="text"/> Project Tax Map Key(s)						



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4. Select Yes for "Has there been a change in property ownership from the existing interconnection agreement?"
5. Select Individual, Company, or Trust and enter the corresponding information, Mailing Address, Email Address, Phone Number, etc. If the property owner is a Trust, please upload a copy of the Short Form trust document.
6. Select No for "Property Owner matches C&C Tax Map Records" to upload a copy of the current executed warranty deed. Also upload a Certificate of Insurance (COI), if applicable.

Program Type      Project Location      Contact Information      System Type      Amend Components      Additional Information & Drawings      Application Summary

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**PROPERTY OWNER (CURRENT OWNER IF THERE HAS BEEN A PROPERTY OWNERSHIP CHANGE)**

Has there been a change in property ownership from the existing interconnection agreement? \*

Is the property owned under an Individual, Company, or held under a Trust? \*

Customer First Name \*

Customer Last Name \*

Suffix

Property Owner matches C&C Tax Map Records \*

Please upload a copy of the Deed to your property \*     
A file has been uploaded.

Mailing Address \*

City \*

State \*

Zip Code \*

7. If there has been a lease transfer, buyout, etc., select Yes for "Has there been a change in system ownership?" to upload a copy of the lease transfer, buyout, etc.

**SYSTEM OWNER**

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Has there been a change in system ownership? \*

Please upload a copy of the lease transfer, buyout, etc. \*     
A file has been uploaded.

Will the system be leased? \*

Are there multiple system owners or lease companies? \*



8. Select No for “Is a PV contractor needed?”

PV CONTRACTOR

Is a PV contractor needed? \*

Company Name

A Grant of Authority is not required and does not need to be uploaded.

9. Select Solar for “What technology are you installing?”.

Solar PV is the only accepted generating technology in this portal.

What technology are you installing? \*  Solar

Are you using Energy Storage? \*

ⓘ  This amendment is for Battery Bonus

This is for a hybrid or customer microgrid

**Save and Continue**

10. Select No Change for “Add/Remove Components”.

Program Type Project Location Contact Information System Type Amend Components Additional Information & Drawings Application Summary

**Components**

Add/Remove Components \*  Add  Remove  No Change

**Submit**



11. On the Additional Information & Drawings page, upload blank documents in all required (\*) fields and complete all required (\*) fields.
12. Enter "0" in the MAXIMUM Generating Capacity (kW) and MAXIMUM Export fields.

MAXIMUM Generating Capacity (kW) *	<input type="text" value="0"/>
MAXIMUM Export (kW) *	<input type="text" value="0"/>

13. Once all applicable information has been entered in the CIT amendment, click Submit for review.