



COMFORTABLE
H O M E
R E B A T E S

Comfortable Home Rebates Program

Job Submission Guide Improvement Pathway

For Pacific Gas and Electric Company (PG&E) territory

2020 v 2.0, October 2020

Welcome to Comfortable Home Rebates, an innovative program that advances energy efficiency in existing homes through Maintenance and Improvements.

As a Participating Trade Ally, you are critical to the success of the Comfortable Home Rebates Program. Your expertise enables Customers to make their homes more energy efficient and helps the State reach its greenhouse gas reduction goals.

The Comfortable Home Rebates Program will also help you by growing the market for energy efficient retrofit projects and providing training and education to improve the quality of the services you provide.

The Job Submission Guide is a living document. We will revise the document as changes to the Job Submission Portal are deployed. The most current version will be available at www.comfortablehomerebates.com.

The Comfortable Home Rebates Program provides assistance and incentives for home-improvement projects that can reduce energy use and make homes more comfortable. This program is managed locally by PG&E and directed by the California Public Utilities Commission in collaboration with the California Energy Commission. Funding comes from utility customers under the auspices of the California Public Utilities Commission. Incentives are offered on a first-come, first-served basis and are effective until funding is expended, or the Program is discontinued. Programs may be modified or terminated without prior notice. Trademarks are property of their respective owners. All rights reserved.

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Section 1: Prepare Your Documentation

Creating and submitting a project will be quicker if you have all the information ready.

Project Documentation

Customer Participation Agreement	Signed by customer – Note, fraudulent claims of occupancy will be immediately disqualified.
Customer Invoice/SOW	Must show measures installed, cost to customer
Conclusion of Install CAS	Where applicable, see chart
Pictures	As required by measure selection
Diagnostic Reports	As required by measure selection
Product Efficiency Certifications	As required by measure selection
Rebate Assignment Form	If rebate being assigned

Documentation Required by Measure

Measure	Documentation Required	Data Required
Heat Pump or AC Unit	AHRI Certificate	Efficiency Rating
Right Size Return	Duculator Photo or Writesoft	Return Diameter
Wall, Attic, & Floor Insulation	None	R Value
Air Sealing	n/a	CFM50
Replacement Ducts	n/a	CFM25, type of testing
Seal Ducts to 5% or 10%	n/a	CFM25
Deep Buried Ducts	None	None
Gas Furnace	None	None
ACCA 4 Assessment		measureQuick Inputs
Refrigerant Recharge		measureQuick Inputs
Efficient Fan Delay	n/a	Make, Model # of Fan Delay
Blower Motor Retrofit	n/a	Make, Model # of Motor
Smart Thermostat	Included in SOW	Make & Model
Water Heating	AHRI Certificate	Efficiency Rating
Pool Pump		Make & model #
LED Lighting		# of Units
*Sensi Predict	Email confirmation of account set up	n/a
*Energy Star Electric Dryer	Existing and Upgrade pictures	Make & Model
*Induction Range or Cooktop	Receipt or Invoice	
*Testing Kicker		n/a
*Electric Water Heater Control Kicker	Photo of control set to Eco or Energy Saver	Eco and Energy Savers mode

Project Information Required

- Project Address
- Year Built
- Conditioned Square Footage
- # of Stories, Bedrooms, Occupants
- HVAC System Details
- Utility Account Information
- Measure Details
- Technician Name
- Project Details
- Customer Details
- Payee Information

Section 2: Step-By-Step Job Submitting

There are two phases to submitting projects in the Job Portal, which is designed around Improvement Applications.

Pre-Installation – we utilize this section to capture the basic project information

Post-Installation – we utilize this section to capture the final installed measure detail

There is no longer an approval process for Pre-Installation, all applications will automatically move to Post-Install phase when the Pre-Install information is completed.

Indicators will show you when sections are incomplete:



You'll see this when a section has been completed and is ready to submit.



You'll see this when a section is missing information.

Let's Get Started!

Login and Create the Project

Link to the Job Portal

<https://portal.builditgreen.org/homeupgrade/s/login/?ec=302&startURL=%2Fhomeupgrade%2Fs%2F>

Login with your credentials and start a new project.

1. Enter address into the address search bar
2. Select building type (options: Single Family Detached or 2-4 Unit)
3. Select pathway “Improvement”

Create a Home Upgrade Project

To get started, enter an address.

838 Meander Court, Walnut Creek, CA, USA

Building Type
Single Family Detached

Select Pathway
Improvement

Cancel

Create Project →

Building Details Section

1. Enter Year built
2. Conditioned sq. Ft. (conditioned area only, no garages or other areas not conditioned)
3. Average ceiling height (Range: 8-12)
4. Select the number of bedrooms, stories and occupants.
5. Select foundation type
 - a. Slab on grade
 - b. Crawlspace
 - c. No-crawlspace
 - d. basement
6. Does the home have an Attic (Yes or No)
 - a. If yes, select Vented or Unvented
 - b. If no, select roof type Cathedral Ceiling or Flat Roof
7. Select existing wall insulation
 - a. Less than 50%
 - b. 50% or more
8. Does the home have an in-ground pool (Yes or No)
9. Select Electric provider
 - a. PG&E, SMUD or Other
10. Select Gas provider
 - a. PG&E, SoCal Gas, Propane or Other
11. If the home is All Electric move the slider to the right.

Building Details ✖

Address
838 Meander Ct
Walnut Creek, CA 94598

* Year Built: * Conditioned Sq. Ft.: * Avg. Ceiling Height (ft.):

* Bedrooms: * Stories: * Occupants:

* Foundation Type
 Slab-On-Grade Crawlspace No-Crawlspace Basement

* Has Attic? Yes No * Roof Type
 Cathedral Ceiling Flat Roof

* Existing Wall Insulation: Less than 50% 50% or more * Has In-Ground Pool? Yes No

* Electric Provider: PG&E SMUD Other * Gas Provider
 PG&E SoCalGas Propane Other

All Electric Home

Click Save & Next in order to move on to the next section.

HVAC System Details & Water Heater Section

Select radio buttons for existing HVAC system details.

- Duct system options: Ducted / Not Ducted
- Duct location options: Attic / Crawlspace / Conditioned Space
- Includes Systems options: Heating and/or Cooling
- Heating system fuel options: Natural Gas / Electric / Propane
- Heating system type options: Forced-Air / Gravity
- Forced Air type options: Furnace / Hydronic
- Cooling system type options: Evaporative / Split / Package

For second HVAC system slide radio button on bottom of HVAC details section and repeat with details on secondary system.

Adding Smart Thermostat Measure(s)?

To add a second Smart Thermostat for zoned systems with one primary HVAC system: duplicate the same HVAC details for the primary system onto the secondary system.

To add a Smart Thermostat to both a primary and secondary HVAC system fill in details for both systems.

*only two smart thermostats are allowed per home. The two thermostats can be for one zoned primary HVAC system or one each for primary and secondary HVAC systems.

Water Heater details

Select radio buttons for existing water heater details

- Fuel type options: Natural Gas / Electricity / Propane
- System type options: Storage / Tankless

For second water heater system slide radio button on bottom of water heater details section and repeat with details on secondary system.

Primary HVAC Distribution

* HVAC Distribution System
 Ducted Not Ducted

* HVAC Duct Location(s)
 Attic Crawl Space Conditioned Space

* Includes Systems (select all)
 Heating Cooling

* Heating System Fuel
 Natural Gas Electricity Propane

* Heating System Type
 Forced-Air Gravity

* Gas Forced Air Type
 Furnace Hydronic

* Cooling System Type
 Evaporative Split Packaged

Add secondary HVAC distribution

Primary Water Heater

* Fuel
 Natural Gas Electricity Propane

* Type
 Storage On-Demand/Tankless

Add secondary water heater

[Save & Next](#)

Click Save & Next in order to move on to the next section.

Utility Service Info Section

- Enter unique 10 Service Agreement Identification Number (SAID) found on the customer utility statement
 - Electric SAID if PG&E provides electric service (do not enter account # from other utilities)
 - Gas SAID if PG&E provides gas service (do not enter account # from other utilities)
- Enter customer first and last name **as shown on the PG&E bill**. This may be different than the applicant
- Enter customer email
- Enter customer phone number
- Our Desktop Review team must match this information up with PG&E's system so please use the exact information as it appears on the PG&E bill

Utility Service Info 🗑️ ✕

* Electric Service ID
1234567892

* Gas Service ID
3124567890

👤 PG&E Account Holder

* First Name * Last Name

Email

* Phone

🗑️ Save & Next



Click Save & Next in order to move on to the next section.


FAQ: What if we can't obtain the service ID #'s to input in the Utility Service Information section?

A: Any customer that has received a utility bill should be able to provide you with a copy. If you absolutely can't find them, the customer can call PG&E customer service at 1-800-743-5000 to retrieve them.

Enter Pre-Install Measures

Select measures by tapping plus sign. Select measures by tapping plus sign. Three measure requirement and one must be a core measure.

Measures		Total Incentive	 
<input type="checkbox"/>	Attic Insulation	Core	\$500
<input type="checkbox"/>	Wall Insulation	Core	\$500
<input type="checkbox"/>	Floor Insulation	Core	\$500
<input type="checkbox"/>	Duct System Improvement	Core	\$200 - \$500
<input type="checkbox"/>	Right-Sized Returns	Core	\$100
<input checked="" type="checkbox"/>	Heating Replacement	Better/Core	\$500
<input type="checkbox"/>	Water Heater Replacement	Better/Core	\$300 - \$500
<input type="checkbox"/>	Smart Thermostat	Better	\$125
<input type="checkbox"/>	Deep-Buried Ducts	Better	\$100
<input type="checkbox"/>	Building/Envelope Air Sealing	Better	\$300 - \$500
<input type="checkbox"/>	Energy Star Electric Dryer	Best	\$100
<input type="checkbox"/>	Induction Range or Cooktop	Best	\$200
<input type="checkbox"/>	"Testing" Kicker for Air Sealing and/or Duct Sealing/Replace...	Kicker	\$150
<input type="checkbox"/>	Electric Water Heater Control Kicker	Kicker	\$150

 Save & Next

Click Save & Next in order to move on to the next section.

Pre-Install Project Info Section

Enter the costs for the project:

- Proposed EE Measure Cost: the EE measure cost should not be less than the rebate amount and should not include costs of other services. For example, do not include the cost for asbestos remediation or drywall work associated with the measure install. We're looking for ONLY the costs for the unit and installation
- Proposed Total SOW Cost: should include the total job cost, including additional services that were provided to the customer
- Work start and finish dates: please be as accurate as possible, we track program savings based on these dates. In fact, the **most important date in this program is the date work finishes because that's when we start tracking savings**

The screenshot shows a 'Project Info' form with the following fields and values:

- *Proposed EE Measures Cost: \$15,000.00
- *Proposed Total SOW Cost: \$20,000.00
- Work Dates section with a sub-header: 'Please provide actual or estimated work start and finish dates.'
- *Work Start Date: May 1, 2020
- *Work Finish Date: May 22, 2020 (highlighted with a red border and a 'Complete this field.' error message below it)
- A 'Save & Next' button at the bottom, highlighted with a red box.

Click Save & Next in order to move on to the next section.

Customer Info Section

The customer may not be the same as the PG&E account holder up in the Utility Info Section. Use this section for those cases to let us know the additional details, this is especially important if the rebate check is going to the owner of the residence and that person lives elsewhere. Confirm the mailing address is either the same as the project address or add the correct mailing address if there is a tenant / landlord situation.

- If the mailing address is the same as the applicant, then slide the button to “same as building address”

Customer Info ✕

Same as PG&E Account Holder

PG&E Account Holder Phone Test Test 888-888-8888

Mailing Address

Same as building address

* Address

* City

* State * ZIP Code

Save & Next

Customer Info ✕

Same as PG&E Account Holder

PG&E Account Holder Phone Test Test 888-888-8888

Mailing Address

Same as building address

Address
838 Meander Ct
Walnut Creek, CA 94598

Save & Next

Click Save & Next in order to move on to the next section.

Incentive Assignment

Select either PG&E account holder, Contractor or other to receive the rebate.

- If Contractor is selected to receive the incentive then, please confirm Contractor mailing address is correct
- If PG&E account holder is selected, then please confirm customer mailing address is correct
- If a third party is selected, please confirm that address is correct
- Upload the Rebate Assignment Form (2020 version, please) if the rebate is going to either the contractor or a third party

Incentive Going to Contractor:

Incentive Assignment 🗑️ ✕

* Send Check To:
 PG&E Account Holder Contractor Other

Name

Phone

Mailing Address

City

State ZIP Code

📁 Documents

Payment Release Authorization
 Or drop files

Incentive Going to PG&E Account Holder:

Incentive Assignment 🗑️ ✕

* Send Check To:
 PG&E Account Holder Contractor Other

Name

Phone

Mailing Address

City

State ZIP Code

Incentive Going to Third Party (example - homeowner who has rented the home out):

Incentive Assignment 🗑️ ✕

* Send Check To:

Name

Phone

Mailing Address

City

State ZIP Code

📁 Documents

Payment Release Authorization

Or drop files

Click Save & Next in order to move on to the next section.

Supplemental Info Section:

The supplemental info area is where any documentation goes that supports the project application.

Accepted file types: png, jpg, jpeg, gif, pdf, doc, docx, xls

- Photos unusual conditions and/or extenuating circumstances (manometer values, attic insulation, damaged duct system, asbestos, etc.)
- Sensi Predict account confirmation
- Writesoft – ACCA Manual J/D/S/T or Ductulator screenshots

Supplemental Info 🗑️ ✕

■ Documents

New File

*Type

Other ▼

Upload File

📁 Upload Files Or drop files

📝 Notes

🗑️ Save & Collapse

Click Save & Collapse in order to complete the Pre-Install application.

FAQ: Are we required to provide pictures?

A: We require photos of all claimed measures to be kept on-hand. This includes existing conditions and upgraded measures.

Post-Install Project Info

FAQ: Can you go back and add additional building details on a post-install application if you did not add them initially to the pre-install application and have already uploaded the documents?

A: Once the pre-application has been submitted and approved, you will not be able to change the building details. Be sure to double check your application before submitting it. If you discover you’ve made a mistake, please email the Desktop Review team and we’ll correct it for you.

Click on the Post-Install tab and complete all required fields in the measure section for each measure in the project:

Measures:

- Insulation- (Attic insulation, Floor insulation, Wall insulation)
 - Enter measure cost (measures cost is equipment and installation labor only.)
 - Enter existing R-value.
 - Enter upgraded information (Sq. ft., R-Value)
- Air Sealing -
 - Select measure type -

- 15% or 30% building leakage reduction
 - Measure cost (measures cost is equipment and installation labor only.)
- Duct System Improvement – Select one of these measure types
 - Replacement Ducts and Duct Insulation
 - Sealing Existing system 5% or less
 - Sealing Existing system 10% or less
 - Enter measure cost
 - Enter upgraded R-value
 - Select upgraded duct type
 - Rigid
 - Flex
 - Enter Test-out
 - CFM25
 - Select Calculation type
 - Enter actual CFM (Only if Actual Return Calculation is selected)
- Deep Buried Ducts (prerequisites)
 - Attic insulation
 - Duct Replacement
- Right-Sized Return
 - Upload ductulator photo or writsoft results
- AC Replacement
 - Enter Measure Cost (measures cost is equipment and installation labor only.)
 - Enter new unit info
 - SEER, EER Capacity (BTU)
 - Select Manufacturer
 - Upload AHRI certificate
- Full Standard ACCA 4 HVAC System Assessment (Maintenance pathway)
 - measureQuick inputs
- Refrigerant Charge Adjustment
 - Select Charge Adjustment
 - + 10% or less
 - +Greater than 10%
 - – 10% or less
 - – greater than 10%
- Enhanced Time Delay Relay
 - Select Manufacturer
- Replacement Blower Motor
 - Select Manufacturer
- Heating Replacement
 - Enter measure cost (measures cost is equipment and installation labor only.)
 - Enter new unit info
 - AFUE (92 to 99)
 - Capacity (BTU)
 - Select Manufacturer
- Water Heater Replacement
 - Select Measure type
 - Storage Gas
 - Electric Storage *Triggers the availability of WH Control Kicker*
 - Enter Measure cost (measures cost is equipment and installation labor only.)
 - Enter New Unit info

- Enter Gas Efficiency- .70 to .89
 - Enter Electric Efficiency 3.09 to 5.00
 - Efficiency Measurements EF/UEF (Energy Factor, Uniform Energy Factor)
 - Enter tank size (gallons)
 - Enter Capacity (BTU)
- Pool Pumps
 - Enter Measure cost
 - Select Confirmed CAEI Installer
 - Select Manufacturer
 - Enter Model number
- Smart Thermostat
 - Enter Measure cost (measures cost is equipment and installation labor only)
 - Select Manufacturer
- Sensi Predict
 - Confirmation email of Sensi Predict account
- Energy Star Electric Dryer
 - Picture of existing dryer
 - Picture of upgraded dryer
 - Select Manufacturer / Model
- Induction Range or Cooktop
 - Proof of purchase (Receipt or invoice)
- Testing Kicker
 - Must have completed Air sealing or Duct sealing measures
- Electric Water Heater Control Kicker
 - Electric Water Heater must be selected as a measure
- LED Interior Lights
 - Enter Measure Cost (measures cost is equipment and installation labor only)
 - Enter number of Units (fixtures) up to 25

3 of 6 Completed. Total Incentive

Measures

Attic Insulation **Core** \$500

All required fields complete

* Measure Cost

EXISTING INSULATION

* Existing R Value (0 to 30)

NEW INSULATION

* Sq. Ft. Installed * Claimed R Value (44 to 80)

Wall Insulation Core \$500

Floor Insulation Core \$500

Duct System Improvement Core \$200 - \$500

Right-Sized Returns Core \$100

Heating Replacement **Better** \$500

All required fields complete

* Measure Type

Sealed Gas Furnace Heat Pump

* Measure Cost

* AFUE * Capacity (BTUh)

* Manufacturer

AC Replacement **Core** \$500

Not all required fields complete

* Measure Cost

* SEER * EER * Capacity (BTUh)

* Manufacturer

* ARI Certificate

Or drop files

Complete this field.

<input checked="" type="checkbox"/>	Water Heater Replacement	Core	\$500
All required fields complete Save			
* Measure Type			
<input type="button" value="Storage Gas"/> <input checked="" type="button" value="Storage Electric"/>			
* Measure Cost			
<input type="text" value="\$3,000.00"/>			
* Efficiency (EF/UEF)		* Efficiency Measurement	
<input type="text" value="3.24"/>		<input type="button" value="EF"/> <input checked="" type="button" value="UEF"/>	
* Size (Gallons)		* Capacity (BTU/h)	
<input type="text" value="50"/>		<input type="text" value="50,000"/>	
<input type="button" value="+"/>	Smart Thermostat	Better	\$125
<input type="button" value="+"/>	Deep-Buried Ducts	Better	\$100
<input checked="" type="checkbox"/>	Building/Envelope Air Sealing	Better	\$300
All required fields complete Save			
* Measure Type			
<input checked="" type="button" value="15% building leakage reduction"/> <input type="button" value="30% building leakage reduction"/>			
* Measure Cost			
<input type="text" value="\$700.00"/>			
<input type="button" value="+"/>	Sensi Predict	Best	\$50
<input type="button" value="+"/>	Energy Star Electric Dryer	Best	\$100
<input type="button" value="+"/>	Induction Range or Cooktop	Best	\$200
<input type="button" value="+"/>	Full ACCA Standard 4 HVAC System Assessment	Maintenance	\$40
<input type="button" value="+"/>	Refrigerant Charge Adjustment	Maintenance	\$50
<input type="button" value="+"/>	Enhanced Time Delay Relay	Maintenance	\$70
<input type="button" value="+"/>	Replacement Blower Motor	Maintenance	\$250
<input checked="" type="checkbox"/>	"Testing" Kicker for Air Sealing and/or Duct Sealing/Replacement	Kicker	\$150
All required fields complete Save			
<input type="button" value="+"/>	Electric Water Heater Control Kicker	Kicker	\$150
Save & Next			

Click **Save & Next** in order to move on to the next section.

Post-Install Project info

Now that your project has been completely installed, please update the Project Info section with the final data and costs for the job.

- Final actual EE measure Costs (costs only for program EE measures installed – no other costs)
- Final actual total SOW of cost signed by the customer (all costs in the project)
- Select project financing. If no financing, select Owner/self-funded
- Select BPI Analyst
- For Maintenance measures, please select technician in dropdown menu – If tech is missing please contact your Contractor Engagement representative
- For Maintenance measures, enter PG&S sticker number
- Select Yes/No if the home received Pre & Post Home Energy Score
- Actual Work start date
- Actual Work end date (**this date is critical; this is the date the program starts collecting energy savings**)
- * **Enter Building infiltration data (Only if Air sealing is selected as a measure.**
 - **Enter Test-in CFM50**
 - **Enter ACHn**
 - **Test-out CFM50**
 - **Enter ACHn**
- Upload Invoice/SOW
- Upload Customer Participation Agreement
- Test-in CAS form
- Conclusion-of-Install CAS form

Post-Install Customer Info

Verify Customer info is entered correctly.

If all information is correct, then select **Save & Next**.

Customer Info

Same as PG&E Account Holder

PG&E Account Holder: Test Test
Phone: 888-888-8888


Mailing Address


Same as building address

Address: 838 Meander Ct
Walnut Creek, CA 94598

Save & Next

Final Proofing Before Submit

Review all fields to make sure there is a green checkbox in the left corner of each section. 

If there is an orange exclamation mark, then there is missing information in that section. 

Once every section is complete the Submit button should be visible at the bottom of the page.

Project Info

Actual EE Meas...	\$15,000.00	Work Start Date	2020-05-01
Actual Total SO...	\$20,000.00	Work Finish Date	
Project Financing	Owner/Self-Funded	Contract/SOW	Client-Signed Contract-SOW (30).pdf
BPI Area/yst	BIG Demo	Customer Partic...	20200527_112426.jpg
Pre-Inst/All HES	No	Test-In CAS	Test In Measurements (CAS) Form - 2020-05-...
Post-Inst		Time-of-Install ...	Test Out Measurements (CAS) Form - 2020-0...

Pre-Install HES

Customer Info

Same as PG&E Account Holder

PG&E Account Holder **Test Test**
Phone 888-888-8888

Mailing Address

Same as building address

Address
838 Meander Ct
Walnut Creek, CA 94598

Save & Next

Incentive Assignment

Payee **Test Test**
838 Meander Ct
Walnut Creek, CA 94598

Payee Phone 888-888-8888

Supplemental Info

Submit is disabled while editing

Submit the Project to Franklin Energy.

FAQ: Do we have to upload the building permits before we submit?

A: You are not required to upload the closed building permits, but you are required to have them on hand and ready for view at FQC or CIP.

Section 3: Tracking Application Review Process

The Desktop Review team usually reviews applications within 7 business days of submission. You can track the status of your project in the portal to see where it is in the review process.

Applications that are missing information or not meeting program criteria will be returned for correction. Corrections are expected to be completed in two weeks.

Reasons Your Application Might Be Returned for Correction

- Account holder information doesn't match PG&E database
- Incomplete application
- Incomplete or missing Customer Participation Agreement form
 - Incomplete sections or fields
- Missing or incomplete CAS Forms
 - Missing testing results
 - Missing existing solar panels numbers or Electric vehicle info
- Missing invoice/SOW with customer signature
- Missing measure criteria or documentation

Responding to Returned Applications

- Upload corrected documents
- Add note to comments section
- We expect corrections to be made within two weeks of an application return

Reasons Your Application Might be Declined

- Residence is master metered
- Customer has participated in the following program:
 - ESA (Energy Savings Assistance)
 - HER (Home Energy Rewards)
 - Cool Savers
 - Energy Fitness
 - CHES (Custom Home Energy Solutions)
 - WatterSaver
 - Green House Calls
 - Any PG&E individual rebates (water heaters, pool pumps, etc..)
- Customer has been in the home less than 1 year
- Customer lives in a mobile home
- Customer lives in a multifamily complex of more than 4 units

Payment Timelines

Once an application has been approved by Desktop Review and passed Field Verification (if selected) it will be batched for payment. Checks are issued by Comfortable Home Rebates to the payee selected in the application. Payment may be expected within 6-8 weeks from application approval.

Field Verification

A select number of applications will be chosen for Field Verification (FQC) by either Franklin Energy or PG&E's CIP (Central Inspection Program). Applications chosen by Franklin Energy for FQC will not be approved for payment until the Field Verification is completed and the project approved by the field reviewer.

Section 4: Job Submission Testing Requirements

Combustion Safety (required for all homes with gas appliances)

- Whole House Ambient CO is always required for all homes (including those assumed to be all electric)
- Certain measures require both a test-in and test-out (measures that involve depressurizing the home) all other measures require only a test-in at time of install
- CO monitors are required for all homes, including all electric homes. Most Negative (Worst Case) depressurization is required for testing for spillage at all gas appliances (Furnace, DHW, Gas log fireplace, etc.)
- CAS Zone Identification/Testing (Base/Worst)
- Gas line testing for all accessible gas lines
- Airfree CO testing for all Gas Appliances with Single Flue (Furnace, DHW, Stove/Oven, Gas Fireplace)
- Ambient CO is always required for all operable gas appliances
- (Furnace, DHW, Stove/oven/broiler, gas log fireplace)
- Ambient CO on "All Furnace types" are required to be tested at the register closest to the unit
- All Combustion Safety failures must be corrected by Test-Out and included in the Contract/SOW

FAQ : How are we supposed to test sealed combustion units?

A: You are supposed to test worst case depressurization in the Combustion Appliance Safety (CAS) and test for carbon monoxide (CO) if possible, at the flue termination.

FAQ: Is CAS testing still required if the owners are not going to replace the furnace and water heater?

A: Yes, you still need to do full combustion testing. There may be existing dangerous conditions. BPI requires that you test before doing any work.

FAQ: Are you supposed to do CAS testing on a dryer?

A: You should do limited CAS testing on gas fuel dryers — check for CO at the flue termination and take an ambient CO measurement in the vicinity of the dryer.

FAQ: Can you speak to Combustion Ventilation Air (CVA) in more detail?

A: The BPI standards and our Whole House Combustion Appliance Safety Protocols explain how to calculate CVA in detail, please refer to those documents

Measure Installed	Conclusion of Install CAS	Blower Door Test in/out	Duct Test
Whole Building Air Sealing	X	X	
Insulation (Attic, Wall, Floor)	X		
Duct Sealing			X
Duct Replacement & Insulation			X
Gas Furnace	X		
Air Conditioner	F		
Gas Water Heater	X		

Table Color Key:

X = Required

F = Required if paired with a gas furnace (split or packaged)

If Unsafe Conditions Are Found

The participating contractor must make the repair onsite or determine if the ‘Make Safe Procedure’ (MSP) applies. If unsafe conditions persist, a PG&E Gas Service Representative (GSR) must be contacted. Collect the **Field Order Number** during your call to PG&E GSR. Provide **Field Order Number** in notes section of the Test Measurements Form (Refer to PG&E Whole House Combustion Safety Procedure and the [NGAT Action Guidelines](#) found the document library).

- To contact PG&E's GSRs: call (800) 813-1975 during business hours, or (800) 743-5000 after 5:30 pm or on weekends. To Contact SoCal Gas: (800) 427-2200

- **Important:** For propane jobs, PG&E GSR is not available. CAS failures at propane jobs must be corrected or facilitated by the participating contractor. If propane CAS failures are detected at the field quality control inspection, the participating contractor is responsible for performing or facilitating the corrections

2-4 Unit or Single-Family Attached Homes

- “2-4 Unit” (Single-family attached) homes are eligible for program participation. To participate, these projects must meet the following criteria:
 - All property/unit owners must agree to participate in Combustion Appliance Safety (CAS) at time of install. All electric units are exempt from CAS testing. CAS failures identified in any unit must be corrected for any unit in the 2-4 Unit building to be eligible for a Program rebate. BPI Analysts should complete the CAS reporting form for each unit
 - Each unit must be metered separately for electric and gas service and submit a separate application
 - Only existing equipment and fixtures are eligible for upgrades. All upgrades must be an improvement over existing equipment, fixtures, and/or building assemblies and meet or exceed measures’ efficiency and requirement specifications. Full details can be found on our Installation Specifications Guidelines under Resources on our website
 - Upon job completion, all combustion appliances must be located outside the building envelope, power-vented or closed/sealed-combustion, or sealed off from the living (conditioned) space such that there is adequate combustion air and combustion gases are appropriately exhausted

Duct System Improvement

- Must use the same testing method at test-in and test-out, either Duct Leakage to Outside (DLTO) or Total Duct Leakage (TDL)
- The measure is for duct system Improvement. It's possible that less than 100% of the system is accessible; however, all accessible ducts must be replaced and reach 5% or better system leakage to claim the measure
- Sealing existing duct systems at all accessible joints and registers to achieve 5% or 10%

Multiple duct systems should be measured separately and added to the measure in the portal.

FAQ: Do we still test homes that have asbestos tape around the joints of the duct work?

A: BPI protocols say to not negatively depressurize the house with a blower door under those circumstances. Running a forced air unit can also negatively depressurize parts of a house, pulling asbestos into the living space. We don't require that you do a blower door test or duct testing when asbestos is present, but you should still be doing combustion testing. We encourage you to use your professional judgment to determine the appropriate testing. If you do limit testing, make sure you explain what you skipped and why in the Test Measurements form notes section.

Deep-Buried Ducts

- Cover R-8 ducts (i.e., 'deep bury' in attic insulation), run low at attic floor, to the maximum insulation depth possible wherever and whenever possible
- Add additional attic insulation material over ducts (and at attic access hatch – typically with fiberglass batt insulation) to maintain the same depth of coverage as the rest of the attic plane

Right-Sized Return

- Right-size return duct(s) and grille/filter housing(s) (length, width and/or depth) upgrade, up to two systems per dwelling unit. Return systems sized per ACCA Manuals J/D/S/T. Specify and install low pressure-drop filter(s) per Title 24
- All 'Right-Size Return' Ductulator calculations should use a Friction Rate of 0.03 as the upgrade target
- Filter grille should be upgraded to bar type (i.e., Shoemaker or similar), rather than stamped face in order to minimize air-flow restriction and pressure drop

Building Leakage

- 0.35 or better ACHn target, 0.5 ACHn minimum performance, achieved in accordance with BPI standards and ventilated per ASHRAE 62.2. (installation of balanced Heat Recovery Ventilation recommended)
 - 15% building leakage reduction (pre vs. post)
 - 30% building leakage reduction (pre vs. post)
 - Test-in cfm50 x 0.85=15% target for Test-out
 - Test-in cfm50 x 0.70=30% target for Test-out
- For a helpful resource, Build It Green has created a Building Leakage Calculator (BLC) to assist in calculating estimated leakage reductions. This calculator will provide targets based on .35, 0.5 ACHn. Feel free to contact desktopqareview@builditgreen.org if you have any questions
- You can find the Building Leakage Calculator on the Program Documents page under Installation section at ComfortableHomeRebates.com
- If building leakage exceeds two times the total square footage of the home, a photo of the manometer reading (CFM50) is required as well as photos of the open cavities
- Whole house mechanical ventilation per ASHRAE 62.2 and version compliance (e.g., ASHRAE 62.2-2010 or ASHRAE 62.2 2013) noted on the CAS form. Recommendations made to the homeowner for mechanical ventilation should be noted on the test measurement form
- ACHn should be calculated based on the volume and LBL N Factor of the residence. All ventilation recommendations should be based on the ASHRAE 62.2 requirements
- Avoid common installation failures: Ensure all CAS doors are weather-stripped and sealed. Penetrations in the ceiling plane, including light fixtures, exhaust fans, speakers, and attic hatches, should be sealed (if accessible) with appropriate materials

Section 5: Building Assembly Specifications

Insulation

- **Wall Insulation:**
 - R value ≥ 13 (2x4 framing) or R value ≥ 19 (2x6 framing), installed per CEC QII Standards
 - For Walls, CEC assumes R-0 as the "Default Prior to 1978". Building vintages 1978 or newer should not be entered as R-0 unless they provide IR camera photos documenting lack of insulation as the dominant existing condition
 - R-0 or higher Prior to 1978 (No Photos Required)
 - R-9 to R-11 (1978-1991 home)
 - R-10 to R-13 (homes 1992 or newer)
- **Attic Insulation:**
 - R-44 or better, installed per CEC QII standards. Existing insulation maximum R19 in CZ 2, 3, 5 Existing insulation maximum R30 in CZ 1, 4, 11, 12, 13, 16
 - If you are installing attic insulation, you are required to consider Heat Producing Devices (HPDs) and appropriately address any potential hazards prior to installation. For more information regarding HPDs (including Knob-and-Tube electrical wiring), please reference the Participant Handbook and/or Installation Specifications on the Document Library
 - The existing attic insulation must meet program requirements. If you are claiming below vintage tables, photos are required (including one w/ruler showing depth of insulation and photos from a distance showing context of the attic plane)
 - Attic hatches must be insulated up to the level of insulation claimed on the application and installed in the attic
 - R-8.23 for 'effective Default Prior to 1978' homes with 16" OC
 - R-8.93 for 'effective Default Prior to 1978' homes with 24" OC
 - R-15.93 for 'effective Default 1978 to Present' homes with 16" OC
 - R-16.53 for 'effective Default 1978 to Present' homes with 24" OC
- **Floor Insulation:**
 - R value ≥ 19 , installed to full-joist thickness, per CEC QII Standards

Lighting

- PG&E accepts pin-based, high-efficacy LEDs. This does not include screw-in LEDs
- Include bulb type code (e.g., GU10, MR16, etc.) so that FQC can confirm these in the field. These are subject to inspection after installation
- CFLs do not qualify for upgrade incentives in the program
- Up to 25 per dwelling unit
- Pictures are always required of existing and upgraded fixtures to be on-hand

Section 6: Equipment Specifications

Heating Systems

- Sealed Gas Furnace: 95% AFUE or better
- All Sealed Combustion (condensing, PVC flues) furnaces require ambient CO at appliance and CO reading in nearest supply register
- Pictures are required to be on-hand at all times of the following:
 - Existing heating system, manufacturer label
 - New Heating system

Heat Pumps

- Heat Pump: 8.5 HSPF or better
- Copy of AHRI certificate (for installed heat pump equipment) required for all heat pump upgrades
- Pictures are required to be on-hand at all times of the following:
 - Existing Heat pump system, manufacturer label
 - New Heat pump system

Air Conditioning Units

- Split AC: SEER 16.0 / EER 12.5 or better Packaged AC: SEER 15.0 / EER 12.0 or better
- Copy of AHRI certificate (for installed AC equipment) required for all AC upgrades
- Pictures are required to be on-hand at all times of the following:
 - Existing AC unit
 - Manufacturer label
 - Outdoor unit

ACCA 4 Assessment

- Must include filter change and date placed on filter*, condenser coil cleaning, and static pressure check
- Should include a report with a written estimate for recommended work.

*If the filter cannot be changed, technicians should date the existing filter and write “Recommended Filter Change” on the filter.

Refrigerant Charge Adjustment (Completion of the ACCA 4 Assessment required)

- Must be done when weather conditions will support accurate results

- A static pressure reading between .5 and 1.0 IWC must be achieved when completing charge
- Adjustment and cannot be performed if condenser coils are more than 15% damaged
- Suction line must be fully insulated, both inside and outside
- Locking caps must always be installed on units after they receive a refrigeration adjustment regardless of the unit's location

Efficient Fan Delay Control (Completion of the ACCA 4 Assessment required)

- The installed fan delay relay must be an approved model listed by the Program. Visit the Comfortable Home Rebate Program website for a list of eligible models

ECM Blower Motor Replacement (Completion of the ACCA 4 Assessment required)

- The installed motor model must be a direct drive, permanent magnet, constant speed motor listed by the Program. Visit the Comfortable Home Rebate Program website for a list of eligible models

Domestic Water Heaters

- Gas Storage Water Heater
 - 0.70 EF/UEF or better
- Electric Storage Water Heater (Heat Pump)
 - 3.24 EF / 3.09 UEF or better
- DHWs located “outside” of the building shell (but attached to the building) need to be CAS tested to determine if there is any communication with the living space. Please provide pictures and specify location in the notes section of the CAS form
- These “outside” locations include utility closets attached to the home with an exterior access door, attached garage, or similar (i.e., any space with walls, roof and door that is attached or connected to the home via building assembly)
- Pictures are required to be on-hand at all times of the following:
 - Existing Water heater
 - Existing Manufacturer label
 - New Manufacturer

Pool Pumps

- CEC Title 20 compliant variable speed pool pump replacing existing single or two-speed pump (primary in-ground pool system only; no jacuzzis or above-ground pools)
- Existing pool pump must be assessed and upgraded pool pump must be installed by a Certified Aquatic Equipment Installer (CAEI)
- Refer to [fpsie.org](https://www.fpsie.org) to search for CAEI's to partner within your area or register for upcoming trainings.

- The Model, Make, Horsepower of the upgraded pool pump is required to be called out on the Scope of Work
- Pictures are required to be on-hand at all times of the following:
 - Existing pool pump
 - Existing Name plate
 - New Pool pump
 - New Name plate

Smart Thermostat

- ENERGY STAR® certified Smart Thermostat. Must be Wi-Fi enabled and confirmed via test login
- Wifi Connection Confirmation (Photo) should be kept on-hand, in case it is requested

Sensi Predict

- System should not be slated for replacement within the next 3 years
- Email showing Sensi account set required

Energy Star Electric Dryer

- Energy Star compliant electric dryer must be listed on Energy Star’s approved list
- Pictures of existing and upgraded are required to be uploaded

Induction Range or Cooktop

- Must be installed during construction period when other measures are installed. Previously installed items do not qualify for rebate.

Section 7: General Job Submission Tips

Utility Incentive Qualifications

Customers who receive both gas and electric service from PG&E are eligible for all of the Improvement Pathway measures listed in Table 5 (below). Customers who only receive one type of fuel from PG&E are eligible for rebates for any equipment selected as part of the combined measures, as long as PG&E supplies the fuel for it. Customers must receive gas or electric service from PG&E with respect to the measure installed for any given project to be eligible for a rebate.

For example, a customer must receive gas service from PG&E to qualify for a gas water heater rebate and/or gas heating (furnace) measure. A customer must receive electric service from PG&E to qualify for an electric water heater rebate, pool pump, lighting, heat-pump heating and/or the electric cooling (Air-Conditioning)

measures. PG&E electric Customers who use propane fuel for water heating or space conditioning (heating and/or cooling) are only eligible for rebates for electric savings.

Additionally, customers must have existing air-conditioning, electric baseboard heating or heat-pump if they only have PG&E electric service **or** an existing natural gas furnace if they only have PG&E gas service, regardless of whether the equipment is selected as a measure as part of an Improvement Pathway incentive application. Customers with either PG&E electric or gas service are eligible for shell measures, as long as their heating or cooling equipment fuel is supplied by PG&E.

- All electric: PG&E all electric customers with no PG&E gas qualify for all electric fuel measures (no propane fuel equipment)
- PG&E electric: Customers receiving electricity from PG&E qualify for all measures that utilize electric fuel
- PG&E gas: Customers receiving gas from PG&E qualify for all measures that utilize natural gas fuel
- Other providers:
 - Customers receiving electricity from PG&E but gas from another gas provider (including SoCalGas) qualify only for electric fuel measures
 - Customers receiving gas from PG&E but electric from another provider qualify only for gas-fueled measures

Fuel Substitution

Upgrading an existing appliance, water heater, or HVAC equipment from gas to electric is allowed within the program if both fuels (gas and electric) are served to the customer by PG&E. We cannot track baseline usage and savings across different utilities (ie SMUD) so PG&E must serve both fuels in this Program.

Examples:

Gas water heating to electric water heating: allowed if PG&E supplies both gas and electric service

Gas space heating to electric space heating: allowed if PG&E supplies both gas and electric service

Fuel switching from propane is not eligible for a rebate because savings cannot be tracked by PG&E.

Data Sharing

Customers agree to share data with Franklin Energy through either the Rebate Application Form (Maintenance pathway) or the Customer Participation Agreement (Improvement pathway).

Share My Data registration is no longer required.

Asbestos

- The BPI Analyst should determine if it is safe to test Duct System or Building Leakage. If testing will not be conducted, then:
 - Pictures of presumed asbestos containing material (PACM) need to be uploaded
 - R-Value of asbestos-coated/wrapped ducts is should be modeled as R-2.1

- Include in the Contract/SOW what company will be used for asbestos abatement by noting the company name and license number
- Building and/or duct leakage measurements not taken due to the presence of PACM must use CEC's vintage table default(s) for energy modeling

Scope of Work/Contract/Invoice

(accepted file types: png, jpg, jpeg, gif, pdf, doc, docx, xls, xlsx)

- The Contract/SOW must have the Participating Contractor's business name, address, and phone number
- The Contract/SOW submitted for Post-Installation Application must include customer signature and date of signature
- Contract/SOW must include all Program upgrade measures. Proposed and/or completed project costs must be entered into the rebate application submission portal and should only include those eligible Program upgrade measures
- Work scope that is performed by subcontractors must be included in the Participating Contractor's SOW document. Subcontractors must abide by the same Program requirements as the Participating Contractor
- Proposed/Completed cost should only include installation of measures, labor, and measure cost
- Upgrade measure information to detail on the Contract/SOW (including, but not limited to):
 - Air Sealing: 15% or 30% leakage reduction
 - Heating: AFUE or HSPF and heating capacity (in BTUs)
 - Cooling: SEER, EER and cooling capacity (in BTUs or tons of cooling)
 - Ductwork: duct insulation (type and R-value), sealing/percent leakage
 - Right Sized Return
 - Deep Buried Ducts
 - ACCA 4 Assessment and Coil Cleaning
 - Refrigerant Charge Adjustment
 - Efficient Fan Delay Control
 - Blower Motor
 - Attic: attic insulation (type and R-value)
 - Walls: wall insulation (type and R-value)
 - Floor: crawl space insulation (type and R-value)
 - DHW: Energy Factor, type, storage capacity, heating capacity (in BTUs)
 - Pool Pump: Make, Model number, Horsepower, type (i.e., variable speed) and name of CAEI assessor and installer company/individual
 - Lighting: Number of pin-based LEDs replacing existing CFL or incandescent light fixtures

- Smart Thermostat: Make, Model number
- Sensi Predict
- Energy Star Electric Dryer
- Induction Range or Cooktop