



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

Comfortable Home Rebates Program

Job Submission Guide Maintenance Pathway

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

v2.1 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

Rebate Application	Signed by customer, must have sticker(s)
Customer Invoice/SOW	Must show measures installed, cost to customer

Note: there is no need for Maintenance customers to sign a Customer Participation Agreement. The Customer Participation Agreement is used only on the Improvement pathway. The Rebate Application serves the same purpose as the Customer Participation Agreement and has the same terms and conditions.

Documentation Required by Measure

Measure	Documentation Required	Data Required
ACCA 4 Assessment	n/a	Filter change date, note/picture of coil cleaning
Refrigerant Recharge	Adjustment need indicated in measureQuick	
Efficient Fan Delay	n/a	Make, Model # of Fan Delay
ECM Blower Motor Retrofit	n/a	Make, Model # of Motor
*Duct System Improvement	n/a	Test-out duct leakage calculation type.
*Right-Sized Return	Ductulator photo or Writesoft calculation file	n/a
*Sensi Predict	Email confirmation of account set up	n/a
*Multi-Measure Kicker	n/a	n/a
*Testing Kicker (Duct sealing & Replacement)	n/a	n/a

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
- Project Files (Rebate Application & Customer Invoice)

Section 2: Step-By-Step Job Submitting

Applications should be submitted within 2 weeks of the project's completion.

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. **Be sure to use Single Family Attached (2-4 units) for residences that share walls.** This allows you to input an apartment or unit number.
3. Select pathway “Maintenance”.

Create a Home Upgrade Project

To get started, enter an address.

Search Address...

Building Type
Please Select

Select Pathway
Maintenance

Enter Building Details

1. Enter Year built
2. Conditioned sq. Ft. (conditioned area only, no garages or other areas not conditioned)
3. Select the number of bedrooms, stories and occupants.
4. **Click Save & Next in order to move on to the next section.**

Building Details

Address
1667 N 1st St
Dixon, CA 95620

Year Built

Conditioned Sq. Ft.

Bedrooms Stories *Occupants

Enter HVAC System Details

Select radio buttons for existing HVAC system details.

- Duct system - Ducted / Not Ducted
- Duct location – Attic / Crawlspace / Conditioned Space
- Includes Systems – Heating
- Heating system fuel – Natural Gas / Electric / Propane
- Heating system type – Forced-Air / Gravity
- Forced Air type – Furnace / Hydronic
- Cooling system type- Evaporative / Split / Package
- **Click Save & Next in order to move on to the next section.**

Primary HVAC Distribution

* HVAC Distribution System

Ducted
Not Ducted

* Includes Systems (select all)

Heating
Cooling

* Heating System Fuel

Natural Gas
Electricity
Propane

* Gas Forced Air Type

Furnace
Hydronic

* Cooling System Type

Evaporative
Split
Packaged

* HVAC Duct Location(s)

Attic
Crawl Space
Conditioned Space

* Heating System Type

Forced-Air
Gravity

Add secondary HVAC distribution

If there is a 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.

Enter Utility Service Info

- Enter unique 10 Service Agreement Identification Number (SAID) found on the customer utility statement for **ELECTRIC** service. Do not enter the gas service SAID.
- Enter correct 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.
- **Click Save & Next in order to move on to the next section.**

Utility Service Info 🗑️ ✕

* Electric Service ID

👤 PG&E Account Holder

* First Name * Last Name

Email

* Phone

🗑️ Save & Next

Enter Measures

Select measures by tapping plus sign. Once enough required measures are selected the kicker will become available.

Testing kicker will only become available when a Duct System Improvement is selected.

Measures

Total Incentive
\$790
🗑️ ✕

<input checked="" type="checkbox"/>	Duct System Improvement	\$500
	<div style="background-color: #1a3d4d; color: white; padding: 5px; text-align: center;">Replacement Ducts and Duct Insulation</div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;">Seal Existing System 5% leakage or less</div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;">Seal Existing System 10% leakage or less</div>	
+	Right-Sized Returns	\$100
+	Smart Thermostat	\$125
<input checked="" type="checkbox"/>	Sensi Predict	\$50
<input checked="" type="checkbox"/>	Full ACCA Standard 4 HVAC System Assessment	\$40
+	Refrigerant Charge Adjustment	\$50
+	Enhanced Time Delay Relay	\$70
+	Replacement Blower Motor	\$250
<input checked="" type="checkbox"/>	Multi-Measure Kicker	Kicker \$50
<input checked="" type="checkbox"/>	"Testing" Kicker for Air Sealing and/or Duct Sealing/Replace...	Kicker \$150

🗑️ Save & Next

Kicker requirement

- Completion of the Assessment required
- Completion of two (2) Energy Savings Measures by the same Contractor.
 - Refrigerant Charge Adjustment
 - Efficient Fan Delay Control**
 - Blower Motor Replacement**
 - Smart thermostat**
 - Duct System Improvement**
 - Right-Sized Returns**
 - Sensi Predict**
- **Click Save & Next in order to move on to the next section.**

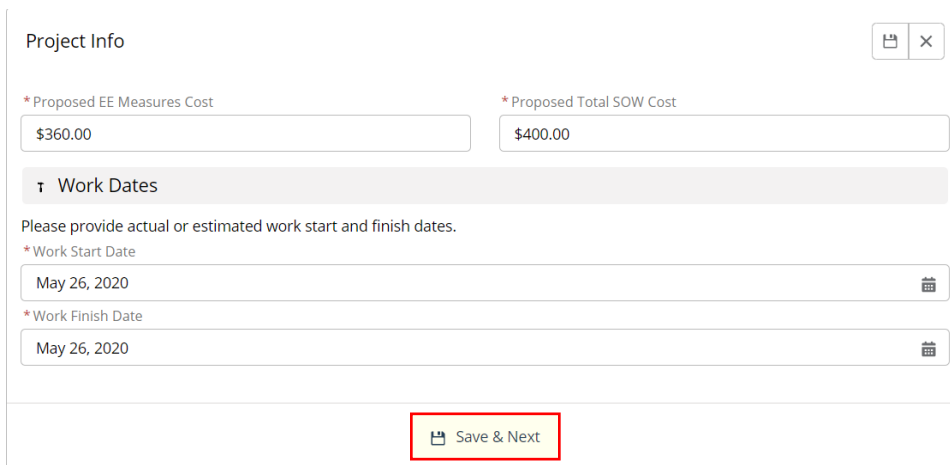
******These measures can only be claimed once per address. When sending prequalification responses, we will note if they have claimed any one-time measures. Please do not submit applications with these, or they will be returned for correction.

Project info

Enter the total cost of each measure into the Proposed EE Measure Cost.

* The EE measure cost must be at least as much as the rebate amount and cannot include the cost of other services.

Proposed cost should include the cost of each measure and any additional services that were provided to the customer.



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

- * Proposed EE Measures Cost: \$360.00
- * Proposed Total SOW Cost: \$400.00
- Work Dates section with a sub-header 'Work Dates' and a note: 'Please provide actual or estimated work start and finish dates.'
- * Work Start Date: May 26, 2020
- * Work Finish Date: May 26, 2020
- A 'Save & Next' button at the bottom, which is highlighted with a red box in the image.

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

Customer info

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.

Customer Info 🗑️ ✕

Same as PG&E Account Holder

PG&E Account Holder **test Test**
 Phone 000-000-0000

Mailing Address

Same as building address

* Address

* City

* State * ZIP Code

🗑️ Save & Next

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

Incentive Assignment

Select either PG&E account holder or Contractor to receive the incentive.

If Contractor is selected to receive the incentive, please confirm Contractor mailing address is correct.

Incentive Assignment 🗑️ ✕

* Send Check To:

Name

Phone

Mailing Address

City

State ZIP Code

🗑️ Save & Next

If PG&E account holder is selected, then please confirm customer mailing address is correct.

Incentive Assignment 🗑️ ✕

* Send Check To:

PG&E Account Holder Contractor

Name
test Test

Phone
000-000-0000

Mailing Address
1667 N 1st St

City
Dixon

State
CA

ZIP Code
95620

🗑️ Save & Next

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

Supplemental Info

Select other and then select save & collapse.

Supplemental Info 🗑️ ✕

📁 Documents

New File

*Type
Other

Upload File
 Or drop files

📝 Notes

🗑️ Save & Collapse

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

Begin Post-Install Project Info

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

ACCA Standard 4 HVAC System Assessment

- Measure quick completion

Refrigerant Charge Adjustment

- Select Charge adjustment
- Measure Quick completion, including filling out the amount of charge added or removed

Enhanced Time Delay Relay (Can only be claimed one time per customer per HVAC unit)

- Select Manufacturer in dropdown menu.

ECM Blower Motor Replacement (Can only be claimed one time per customer per HVAC unit)

- Select Manufacturer in dropdown menu

Smart Thermostat (Can only be claimed one time per customer per HVAC unit)

- Select Manufacturer in dropdown menu

Multi-Measure Kicker

- Completion of the Assessment plus:
 - Completion of at least two (2) Energy Saving Measures by the same Participating Contractor, which may include:
 - Refrigerant charge adjustment
 - Efficient fan delay control
 - Blower motor replacement
 - Smart thermostat
 - Duct system improvement
 - Right-sized returns
 - Sensi Predict

Testing Kicker (Duct sealing or replacement only)

- Completion of one of the three options
 - Replacement ducts
 - Seal existing system to 5% or less
 - Seal existing system to 10% or less
- Enter upgraded R-value
- Select existing duct type
 - Rigid
 - Flex

- Select presumed asbestos
 - (Yes/No)
- Complete “Test-out” section
- Completion of Duct leakage testing
 - Enter cfm25 results
 - Select calculation type
 - Nominal heating
 - Nominal cooling
 - Actual return (requires “actual cfm”)
- Select (Yes/No) Leakage to outside

Measures

Total Incentive
\$790
✖

<input checked="" type="checkbox"/>	Duct System Improvement		\$500
	Replacement Ducts and Duct Insulation	Seal Existing System 5% leakage or less	Seal Existing System 10% leakage or less
<input type="checkbox"/>	Right-Sized Returns		\$100
<input type="checkbox"/>	Smart Thermostat		\$125
<input checked="" type="checkbox"/>	Sensi Predict		\$50
<input checked="" type="checkbox"/>	Full ACCA Standard 4 HVAC System Assessment		\$40
<input type="checkbox"/>	Refrigerant Charge Adjustment		\$50
<input type="checkbox"/>	Enhanced Time Delay Relay		\$70
<input type="checkbox"/>	Replacement Blower Motor		\$250
<input checked="" type="checkbox"/>	Multi-Measure Kicker	Kicker	\$50
<input checked="" type="checkbox"/>	"Testing" Kicker for Air Sealing and/or Duct Sealing/Replace...	Kicker	\$150

Save & Next

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

Project info

Complete this section by entering the missing data in each field

- Actual EE measure Cost (costs only for program EE measures installed – no other costs)
- Actual total SOW cost (all costs in the project)
- Select project financing, or If no financing –
 - select Owner/self-funded
- Select technician in dropdown menu – If tech is missing, please contact Sam skhamseh@franklinenergy.com
- Select Work start date
- Select Work end date
- Upload Invoice/SOW
- Upload Rebate application

Project Info 🗑️ ✕

* Actual EE Measures Cost * Actual Total SOW Cost

Project Financing

* Technician

* Did this home get a pre-installation Home Energy Score (HES)?

* Did this home get a post-installation Home Energy Score (HES)?

Work Dates

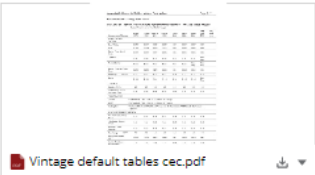
Please provide actual work start and finish dates.

* Work Start Date

* Work Finish Date

Documents

Contract/SOW

 Vintage default tables cec.pdf

* Customer Rebate Application
 Or drop files

Complete this field.

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	000-000-0000

🗑️ Mailing Address

Same as building address

Address
1667 N 1st St
Dixon, CA 95620

🗑️ Save & Next

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...	\$210.00	Work Start Date	2020-05-26
Actual Total SO...	\$300.00	Work Finish Date	2020-05-26
Project Financing	Owner/Self-Funded	Contract/SOW	Vintage default tables cec.pdf
Technician	BIG Demo	Customer Rebat...	
Pre-Install HES	No		
Post-Install HES	No		

✅ Customer Info
✎

Name	test Test	Mailing Address	
Phone	000-000-0000	1667 N 1st St	Dixon, CA 95620

✅ Incentive Assignment
✎

Payee	test Test 1667 N 1st St Dixon, CA 95620	Payee Phone	000-000-0000
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Supplemental Info
✎

🗑️ Submit

Submit the Project to Franklin Energy.

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 do not meet 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 Rebate application
- Incomplete or failing measureQuick fields
 - Incomplete sections or fields
 - Failed data points
 - Missing testing results
 - Missing existing solar panels numbers or Electric vehicle info
 - Filter changed date not filled out
- Refrigerant charge failed or not tested
- Missing stickers or incorrect sticker numbers
- For mobile homes, photo showing state of permanence not supplied (i.e. photo showing removal of axel)

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 on an axel and with a license plate
- Customer lives in a multifamily complex of more than 4 units

To minimize the chance of your application being declined:

- Send addresses (No Names!!) to ebeierle@franklinenergy.com for prequalification within 1 week of scheduling
- Submit applications within 2 weeks of completing the project. Applications submitted more than 2 weeks from project completion will be rejected if they experience a disqualifying event.

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.