



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

Comfortable Home Rebates Program

Job Submission Guide

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

2022 v 1.0, March 2022

Welcome to Comfortable Home Rebates, an innovative program that advances energy efficiency in existing homes through 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, false claims of occupancy will be immediately disqualified.
Customer Invoice/SOW	Must show measures installed, cost to customer
Conclusion of Post-Install Combustion Safety	Where applicable, see chart
Pictures	As required by measure selection
Diagnostic Reports	As required by measure selection
Product Efficiency Certifications (AHRI)	As required by measure selection
Rebate Assignment Form	If rebate being assigned to non-account holder
Manual J and D Calculation Report	Required if claiming certain HVAC kickers

Documentation Required by Measure

Measure	Documentation Required	Data Required
Heat Pump Space Conditioning	AHRI Certificate; CF3R	Upload document: PDF or image
Attic Insulation	Photo of ruler next to level of insulation or photo from insulation company stating eff. level	Upload photo
Air Sealing	CFM50 w/ACHn in application	CFM50 and ACHn input in application
Replacement Ducts	CFM25 or DLTO with Cooling Tonnage/Heating KBTU or Factory CFM Rating	CFM25, type of testing
Seal Ducts to 5% or 10%	CFM25 with Cooling Tonnage/Heating KBTU or Factory CFM Rating	CFM25 input in application
Smart Thermostat	Make and model included in SOW	Make & Model on website drop down
Heat Pump Water Heating	AHRI Certificate	Upload document: PDF or image
Multi-Stage System HVAC Kicker	Model number from CF-3R	Input in application
16 SEER or Greater HVAC Kicker	CF-3R	
Manual J Verified HVAC Kicker	Worksheet (WrightSoft or equivalent)	Upload doc: PDF, spreadsheet, or image
Manual D Verified HVAC Kicker	Worksheet (WrightSoft or equivalent)	Upload doc: PDF, spreadsheet, or image

Cash for Clunkers	Picture of old unit, model and SEER if still legible	Upload photo
Whole House Fan	Make and model of fan on SOW	Input in application; photo showing insulated lid


Project Information Required

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

Section 2: Step-By-Step Job Submitting

There is no longer a Pre-Install application process. Jobs go from Created to Submitted.

Indicators will show you when sections are complete:

 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 the address into the address search bar
2. Select building type (options: Single Family Detached or 2-4 Unit)

Create a Home Upgrade Project

To get started, enter an address.

Building Type

Select Pathway

Building Details Section

1. Enter Year built
2. Conditioned sq. Ft. (conditioned area only; no garages or other areas not conditioned)
3. Select the number of stories.
4. Select foundation type
 - a. Slab on grade

- b. Crawlspace
 - i. If Crawlspace, select Foundation Venting: Vented or Unvented
 - c. Other
5. Does the home have an Attic (Yes or No)
 - a. If no, select roof type Cathedral Ceiling or Flat Roof
6. Select Electric provider
 - a. PG&E, SMUD or Other
7. Select Gas provider
 - a. PG&E, SoCal Gas, Propane or Other
8. If the home is All Electric, move the slider to the right.
9. If the home has a secondary HVAC system or water heater, move the slider to the right.
10. Enter the Permit #
11. Enter the Customer Invoice Number
12. Is a panel upgrade required? (Yes or No)

Building Details
🗑️ ✕

Address
2618 Alum Rock Ave
San Jose, CA 95116

*Year Built 📘 *Conditioned Sq. Ft. 📘

*Stories

*Foundation Type

*Has Attic?

*Electric Provider *Gas Provider

All Electric Home

Add secondary HVAC distribution

Add secondary water heater

*Permit # *Customer invoice # *Panel upgrade required?

🗑️ Save & Next

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

Utility Service Info Section

- Enter unique 10-digit 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 Technical 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

* Gas Service ID

👤 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.

Q: Are homes with propane eligible for CHR?

A: Homes with propane are only eligible for non-infiltration measures (smart thermostats or whole house fans). If the customer electrifies the home and propane is no longer in use within the home, then the customer can claim all measures, aside from heat pumps.

If the customer maintains the use of propane in any way, we cannot support tightening the building shell with air sealing, insulation, or better ductwork. We are also unable to rebate equipment as propane is not regulated by the CPUC, it is regulated at the Federal level.

Select Measures

Select measures by tapping plus sign.

Measures	0 of 0 Completed.	Total Incentive
<input type="checkbox"/> Attic Insulation		\$0
<input type="checkbox"/> Building/Envelope Air Sealing		\$400
<input type="checkbox"/> Duct System Improvement		\$300
<input type="checkbox"/> Heat Pump Space Conditioning		\$200 - \$500
<input type="checkbox"/> HVAC Kicker Multi-Stage System		\$750
<input type="checkbox"/> HVAC Kicker 16 SEER or Greater		\$100
<input type="checkbox"/> HVAC Kicker Manual J Verified		\$100
<input type="checkbox"/> HVAC Kicker Manual D Verified		\$100
<input type="checkbox"/> HVAC Kicker Cash for Clunkers		\$150
<input type="checkbox"/> Heat Pump Water Heater		\$200
<input type="checkbox"/> Whole House Fan (Primary)		\$750
<input type="checkbox"/> Whole House Fan (Secondary)		\$100
<input type="checkbox"/> Smart Thermostat		\$100
		\$50

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

For Measure, input the following information, depending upon the measures selected.

- Attic Insulation
 - Enter measure cost (measure cost is equipment and installation labor only)
 - Enter sq ft installed
 - Enter Claimed R-Value (44 to 80)
 - Upload a photo of the insulation with a ruler showing installed depth
- Building/Envelope Air Sealing
 - Enter measure cost (measure cost is equipment and installation labor only)
 - Enter the Test-Out CFM50
 - Enter the Test-Out ACHn
- Duct System Improvement
 - Select Replacement*, Seal to 5%, or Seal to 10%

- Enter the measure cost (measure cost is equipment and installation labor only)
- Enter the Test-Out CFM25
- Select the Calculation Type: Nominal Heating, Nominal Cooling, or Actual Return
 - If Actual Return is selected, enter the Actual CFM
- Leakage to Outside? (Yes or No)

*If Duct Replacement is selected, please use the Supplemental Info section at the bottom of the application to provide the HERS CF3R Mch20 to ensure the project is not returned for corrections.

- Heat Pump Space Conditioning
 - Enter the measure cost (measure cost is equipment and installation labor only)
 - Enter the HSPF (8.5 to 12)
 - Enter the Capacity (BTUh) (5000 to 60000)
 - Select the Manufacturer
 - Enter the Old Unit SEER (0.5 to 14.0)
 - Enter the Old Unit Serial #
 - Select the Previous Unit Fuel Type (Gas or Electric)
 - Select the Old Furnace Status (Decommissioned or Back Up Heating)
 - If system has mini splits, enter the number of units (1 to 20)
 - Enter the Previous AC Model, if readable (Can use illegible or unreadable, if not clear)
 - Select the Existing AC Type (Room Unit or Central)
 - Enter the Previous/Existing Furnace Model # (Can use illegible or unreadable, if not clear)
- HVAC Kicker Multi-Stage System (Only available if Heat Pump Space Conditioning is selected)
 - Enter the Model Number
- HVAC Kicker 16 SEER or Greater (Only available if Heat Pump Space Conditioning is selected)
- HVAC Kicker Manual J Verified (Only available if Heat Pump Space Conditioning is selected)
 - Upload Worksheet
- HVAC Kicker Manual D Verified (Only available if Heat Pump Space Conditioning is selected)
 - Upload Worksheet
- HVAC Kicker Cash for Clunkers (Only available if Heat Pump Space Conditioning is selected and Old Unit SEER is 10.0 or lower)
- Heat Pump Water Heater
 - Enter measure cost (measure cost is equipment and installation labor only)
 - Enter Efficiency (UEF) (3.09 to 5.0)
 - Enter the Size (Gallons) (30 to 150)
 - Enter the Unit Serial #
 - Enter the Previous Unit Tank Size (Gallons) (28 to 100)
 - Select the Previous Unit Fuel Type (Gas or Electric)
 - Select Mixing Valve Installed (Yes or No)
 - Select Operating Mode at Installation (Heat Pump Only, Hybrid, Electric, or Vacation)
 - Select Condensate Required? (Yes or No)
 - Select Location Installed (Garage, Outdoor Closet, Indoor Utility Room, or Other)
 - Select TOU Scheduled? (Yes or No)
- Whole House Fan
 - Enter Make and Model of Fan

- Use Supplemental Info to upload a photo of the Whole House Fan showing an insulated lid that closes when not in use
- Smart Thermostat
 - Enter measure cost (measure cost is equipment and installation labor only)
 - Select the Manufacturer/Model from the dropdown menu

Project Info Section

- Enter the Work Start Date. **Please be as accurate as possible, as this is the date we use to conclude the baseline energy usage period.**
- Enter the Work Finish Date. **Again, please be as accurate as possible, as this is the date we use to start tracking the savings generated by the measure installed.**
- Upload the Scope of Work. It should include all measures being submitted for rebate (including things like Effective R-Value or duct sealing percent).
- Upload the Customer Participation Agreement. Please double check that Number of Solar Panels or kW Production are filled out when the customer has solar to avoid having the project returned.
- Upload the Conclusion of Install CAS (required if gas appliances are in use in the home).

Project Info
🗑️ ✕

▾ Work Dates

Please provide actual work start and finish dates.

* Work Start Date

Complete this field.

* Work Finish Date

📁 Documents

* Contract/SOW

📁 Upload Files
Or drop files

* Customer Participation Agreement

📁 Upload Files
Or drop files

* Conclusion-of-Install CAS

📁 Upload Files
Or drop files

📁 Save & Next

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 goes 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 **Test Test**
Phone **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 **Test Test**
Phone **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, Customer, 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 Customer is selected, it will populate based off the Customer Information from the previous section
- 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 anyone other than the PG&E Account Holder

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

 Save & Next

Incentive Going to PG&E Account Holder:

Incentive Assignment 🗑️ ✕

* Send Check To:

PG&E Account Holder Contractor Other

Name
Test Test

Phone
888-888-8888

Mailing Address
838 Meander Ct

City
Walnut Creek

State
CA

ZIP Code
94598

🗑️ Save & Next

Incentive Going to Customer (Example – Partners who live together with different last names, when the incentive should go to the partner who is not listed on the PG&E bill)

Incentive Assignment 🗑️ ✕

* Send Check To:

PG&E Account Holder **Customer** Contractor Other

* Name
Renter One

* Phone
777-777-7777

* Mailing Address
2618 Alum Rock Ave

* City
San Jose

* State
CA

* ZIP Code
95116

📁 Documents

* Payment Release Authorization

📁 Upload Files Or drop files

🗑️ Save & Next

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 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 of unusual conditions and/or extenuating circumstances (manometer values, attic insulation, damaged duct system, asbestos, etc.)
- Writsoft – ACCA Manual J/D/S/T

Supplemental Info

Documents

New File

*Type

Other

Upload File

Upload Files Or drop files

Notes

Save & Collapse

Click Save & Collapse in order to Submit.

Project Submission FAQs

Q: Can you go back and add additional building details once an application has been submitted for review?

A: If you need to make changes to the building details, and you've already submitted the project, please reach out to Technical Review. We can return the project for corrections, allowing you to update the building details.

Please note: when building details are updated, many of the fields in the following sections of the application will be erased and you will need to start over on those. It is always best to input the information correctly the first time.


Q: 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.

Q: 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.

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 Analyst	BIG Demo	Customer Partic...	20200527_112426.jpg
Pre-Install HES	No	Test-In CAS	Test In Measurements (CAS) Form - 2020-05-...
Post-Inst	<input type="text" value="Pre-Install HES"/>	Time-of-Install ...	Test Out Measurements (CAS) Form - 2020-0...

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.

Section 3: Tracking Application Review Process

The Technical Review team usually reviews applications within 1-2 weeks 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 existing solar panel or electric vehicle information
- Missing or incomplete CAS Forms
 - Missing testing results
- Missing invoice/SOW with customer signature
- Missing rebate assignment form (if payment is going to anyone other than account holder)
- Missing AHRI certificate for heat pump water heater or heat pump space conditioning
- Missing HERS forms (CF-3R or CF-3R Mch20) for measures that require HERS testing
- 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)
 - Energy Fitness
 - CHES (Custom Home Energy Solutions)
 - WatterSaver
 - Green House Calls
 - Any PG&E individual rebates (water heaters, pool pumps, smart thermostat, etc.)
- Customer has been in the home less than 1 year

- Customer lives in a mobile home (some exceptions can be made if the mobile home is on a foundation and has no axel or license plate. Reach out to your account manager to discuss unique cases)
- Customer lives in a multifamily complex of more than 4 units

Payment Timelines

Once an application has been approved by Technical 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)
- CAS testing is required whenever gas appliances are used in the home, even if they are not being replaced. CAS testing is done at the conclusion of installation.
- CO monitors are required for all homes, including all electric homes. Home must be set up in Greatest Depressurization (Worst Case Scenario) for testing spillage at all gas appliances (Furnace, DHW, Gas log fireplace, etc.)
- CAS Zone Identification/Testing (Base/Worst)
- Gas line fuzz leak 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 communicated to the customer with notes in the CAS form on whether or not the customer declined the recommendations.
 - If the failure is part of the scope of work being rebated, CAS failures must be corrected and included in the contract/SOW.
 - If the failure is significant, follow PG&E's Make Safe procedure, which may include calling a Gas Service Representative (GSR).

CAS FAQs

Q: 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 as appropriate for older systems or nearest supply register if sealed combustion.

Q: Is CAS testing still required if the owners are going to replace the furnace and water heater?

A: Yes, if there are gas appliances existing in the home, post install, such as a gas dryer or fireplace, you still need to do full combustion testing. There may be existing dangerous conditions. We want to ensure we are not leaving the home in unsafe conditions.

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

A: If there is no flue termination to test on an appliance, room ambient air should be tested as well as nearest supply register and spraying all accessible gas lines for fuzz leaks.

Q: 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 Out	Duct Test
Whole Building Air Sealing	X	X	
Attic Insulation	X		
Duct Sealing	X		X
Duct Replacement & Insulation	X		X

Table Color Key:

X = Required

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:** Propane jobs are eligible with the TECH program and can be made eligible for CHR if a customer no longer has propane burning appliances after a retrofit project. (i.e., full electrification for better use of solar for example.) Contact your CHR representative if you have a customer that wants to discontinue the use of propane.

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 conclusion 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 are eligible for upgrades. All upgrades must be an improvement over existing equipment, 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.

Duct System Improvement

- Must use either Duct Leakage to Outside (DLTO) or Total Duct Leakage (TDL)
- If you're doing duct replacement, 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
- Otherwise, you can seal existing duct systems at all accessible joints and registers to achieve 5% or 10% to select duct sealing to 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.

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)
- For a helpful resource, we have 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 franklinenergy.com 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

- **Attic Insulation:**
 - R-44 or better, installed per CEC QII standards. 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

Section 6: Equipment Specifications

Heat Pumps

- Heat Pump: 8.5 HSPF and/or 15 SEER or better
- Copy of AHRI certificate (for installed heat pump equipment) required for all heat pump upgrades
- Copy of HERS CF-3R
- Pictures are required to be on-hand at all times of the following:
 - Existing Heat pump system, manufacturer label
 - New Heat pump system

Heat Pump Water Heaters

- Electric Storage Water Heater (Heat Pump)
 - 3.24 EF / 3.09 UEF or better
- Any gas burning 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

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

Section 7: General Job Submission Tips

Utility Incentive Qualifications

Customers who receive both gas and electric service from PG&E are eligible for all measures listed in the CHR-TECH Fuels Matrix Infographic in the [Document Library](http://www.comfortablehomes.com) at www.comfortablehomes.com. 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 electric service from PG&E to qualify for a whole house fan. PG&E electric Customers who use propane fuel for water heating or space conditioning (heating and/or cooling) are only eligible for non-infiltration Measures (Whole House fan and smart thermostat).

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 application.

- All electric: PG&E all electric customers with no PG&E gas qualify for all fuel measures (no propane used within the home for any reason)
- PG&E electric: Customers receiving electricity from PG&E qualify for all measures that utilize electric fuel, provided the home does not use propane for cooking or heating
- PG&E gas: Customers receiving gas from PG&E qualify for all measures that reduce natural gas consumption (i.e., shell measures like duct work, insulation, and air sealing) even if PG&E is not the electric service provider.
- 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 (i.e., SMUD) so PG&E must serve both fuels in this Program.

Examples:

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

Dual fuel HVAC to electric HVAC: allowed if PG&E supplies both gas and electric service

Fuel switching from propane is not eligible for a rebate unless switching to all electric (including heating, water heating, and cooking - no propane left in use). The heat pumps will not be eligible for rebate, but all other measures (i.e., duct sealing or replacement, air sealing, etc.) will be eligible.

Data Sharing

Customers agree to share data with Franklin Energy through the Customer Participation Agreement.

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 should be 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)

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
- Heating: HSPF and heating capacity (in BTUs)
- Cooling: SEER and cooling capacity (in BTUs or tons of cooling)
- Ductwork: duct insulation (type and R-value), sealing/percent leakage
- Attic: attic insulation (type and R-value)
- DHW: Energy Factor, storage capacity, heating capacity (in BTUs)
- Smart Thermostat: Make, Model number