

Energy Upgrade California™ Incentive Reservation Form



Retrofitting or remodeling an existing home is an ideal way to help save energy, money and the environment. And now through the Energy Upgrade California program, homeowners served by Southern California Gas Company (SoCalGas®) and whose electric service is provided by a municipal electric service provider can receive incentives that can help homeowners start on the smart energy journey.

Receive incentives in just a few easy steps!

Southern California Gas Company customers' that are property owners of single-family, detached homes are eligible for incentives of up to \$1,280 for installing energy-efficiency measures in their homes. Property owners can choose between two packages for participation.

Basic Package

For incentives of \$320 a participating contractor must install ALL of the following measures, as described on page 3, table 1, in accordance with program requirements. If one or more measures are already installed, the home is ineligible for the Basic Package, however you may still participate in the Advanced Package.

Advanced Package

For incentives between \$400 and \$1,280, participating contractors will need to install the basic package measures where applicable and a mix of other energy-efficient measures to meet a minimum energy savings of 10 percent to 40 percent. Energy savings will be based on a modeling simulation performed by the participating contractors.

For complete SoCalGas Energy Upgrade California program eligibility requirements and instructions, please read this Reservation Package in its entirety.

Questions? Call 1-888-431-2226.



Incentive Reservation Form

Use this form for incentive reservation requests

Instructions:

This program is offered to customers who are serviced by SoCalGas. A SoCalGas account number is required to complete this form.

1. Carefully review the Energy Upgrade California program Incentive Reservation Form for program participation eligibility requirements, including Terms and Conditions (page 4)
2. Read, sign, and date the Terms and Conditions (page 4); Reservation form must be submitted within 20 business days from the date of customer signature.
3. Complete Section 1: Required Customer Information (page 5): Note: Customers are encouraged to work with the contractors to complete Section 1.
 - a. Complete Section 2 for Basic Package incentive reservations (page 6). (See page 3 for qualifications) In addition, participating contractors are required to submit the following document:
 - i. Job Reporting Template (JRT)
 - b. Complete Section 3 for Advanced Package incentive reservations (page 7). In addition, participating contractors are required to submit the following documents: (See page 3 for qualifications)
 - i. Job Reporting Template (JRT), including the Comprehensive Work Scope of measures that will be installed at the customer's home
 - ii. Approved modeling simulation building model (.BLD file) and ECON-2 report (.PDF file)
 - c. If you are replacing the air conditioning system, follow the air conditioner equipment sizing calculations instructions in the JRT and submit the associated documentation as directed. (Advanced Package only)
4. **Submit the complete Incentive Reservation Form and any supporting documents (if applicable) to SoCalGas using any of the methods below:**

E-Mail:

EUCA_Processing@icfi.com

Mail:

Energy Upgrade California
ICF International
14724 Ventura Blvd, #1001
Sherman Oaks, CA. 91403

Fax:

818-325-3137

5. Upon successful review of the complete Incentive Reservation Form and project eligibility, a Confirmation of Incentive Reservation and an Incentive Application form will be sent out. Note: SoCalGas reserves the right to verify reservation information by inspecting the house in its current condition.
6. **After a Confirmation of Incentive Reservation Form is issued, you may begin working on your project.** The contractor has 60 calendar days, from the date of Confirmation of Incentive Reservation to complete improvements and submit a complete Incentive Application Form.

Qualifications for the Basic Package Retrofits:

Customers must have an existing central heating and/or cooling (i.e., ducted) system in addition to installing all of the following energy-efficient measures below:

Measure	Does existing house qualify?*	Post-retrofit target
Attic insulation upgrade	To qualify: must start at R-11 or below	Attic insulation to R-30 or better per local jurisdiction
Duct leakage improvement	To qualify: hasn't had ducts sealed within past 5 years	Final leakage rate cannot exceed 15 percent of airflow
Air sealing	To qualify: hasn't already had air sealing in home within past 5 years	Air sealing to 0.35 ACHn or better (see detailed requirements in QA policy/Contractor Handbook for sealing to better than 0.35 ACHn)
Insulation of domestic hot water pipes	N/A	First 5 feet of visible inlet/outlet accessible pipe extending from hot water heater must be insulated
Low-flow showerhead with thermostatic-activated flow restriction valve or thermostatic-activated flow restriction valve device	N/A	Install showerheads to low-flow showerheads with thermostatic-activated flow restriction valve or thermostatic-activated flow restriction valve device

**Note: If the existing home meets all of the conditions above, it qualifies for the Basic Package incentives. If the customer's home does not meet one or more of the conditions above and/or does not have a central heating system, customers are encouraged to take the next step into the Advanced Package for deeper energy savings and a larger incentive.*

Qualifications for the Advanced Package Retrofits:

Customers *must* address the envelope of their home prior to proper sizing their cooling and heating systems and must meet a minimum of 10 percent energy reduction by installing the Basic Package measures where applicable and a combination of the following energy-efficient measures to be eligible for incentives:

- Air sealing
- Attic insulation
- Wall insulation
- Floor insulation
- Duct test and seal
- Insulation of first 5 feet of cold water inlet pipe and all exposed and accessible hot water piping from hot water heater
- Low-flow showerhead with thermostatic activated flow restriction valve or thermostatic-activated flow restriction valve device
- Proper sizing of heating and cooling system per ENERGY STAR® Quality Installation guidelines
- Proper sizing of domestic hot water system (i.e., ENERGY STAR natural gas storage water heaters, tankless water heater, energy-efficient electric storage water heater)
- ENERGY STAR labeled interior hardwired fluorescent fixtures
- ENERGY STAR labeled exterior hardwired fluorescent fixtures
- High performance dual-pane windows
- Cool roof
- Radiant barrier

Terms and Conditions

1. **I understand that the Incentive Reservation Form and subsequent Incentive Application Form are accepted on a first-come, first-served basis while funding is available or until discontinued by the California Public Utilities Commission (CPUC). This Program will end December 31, 2012 or earlier if all allocated funds are depleted before that date. Qualified energy-efficiency measures are eligible for incentives if the corresponding Incentive Reservation Form is received by SoCalGas no later than October 17, 2012.**
2. **I am the property owner of a detached, single family residence with an active meter(s) served by both SoCalGas. I understand that I am only eligible to receive incentives that correspond directly to the type of service (e.g. natural gas) for which my detached single family residence currently receive service from SoCalGas. Detached single family residence must be fully constructed. New construction does not qualify.**
3. I understand energy-efficiency measures must meet the program qualifications described on the Incentives Reservation Form.
4. I understand that under certain circumstances incentives may be taxable and, if greater than \$600, may be reported to the IRS unless I am exempt from reporting. I understand that I should consult my tax advisor concerning the taxability of incentives. SoCalGas is not responsible for any taxes that may be imposed as a result of my receipt of this rebate.
5. I understand incentives cannot exceed the combination of purchase price and installation cost.
6. I understand and agree that the choice of the energy-efficiency measures, selection of participating contractor, manufacturer or dealer, purchase of materials, work performed, and the payment thereof, are my sole responsibilities. I waive any and all claims against SoCalGas, their respective parent companies, their respective directors, officers, employees and authorized agents, and will indemnify SoCalGas for any claims arising out of or relating to the installation and/or use of energy-efficiency measures referred to in this Application. **I ALSO UNDERSTAND THAT SOCALGAS MAKES NO WARRANTY, WHETHER EXPRESSED OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTY OF MERCHANTABILITY FOR ANY PARTICULAR PURPOSE, USE, OR APPLICATION OF THE MEASURES REGARDING MANUFACTURERS, DEALERS, MATERIALS AND WORKMANSHIP.**
7. Without limiting the generality of the foregoing, neither SoCalGas shall not be liable for any type of damages, whether direct, indirect, incidental, consequential, exemplary, reliance, punitive or special damages, including damages for loss of use, regardless of the form of action, whether in contract, indemnity, warranty, strict liability or tort, including negligence of any kind.
8. I am responsible for meeting all program requirements and complying with my state/county/city governments, property owner and/or homeowner's association requirements (if any) in my area regarding local conditions, restrictions, codes, ordinances, rules, and regulations pertaining to all installations. I further understand that it is my sole responsibility to ensure all incentivized measures are installed as per all manufacturers' specifications.
9. **I agree that SoCalGas has any liability whatsoever concerning the quality, safety or installation of the energy-efficiency measures, including their fitness, workmanship, or any other matter.**
10. I agree to allow SoCalGas's quality assurance team or their respective representatives and/or CPUC representatives' reasonable access to verify the existing conditions. I agree to this inspection to be eligible to participate in the program and receive an incentive for the qualified measures. I understand that this inspection is for the purpose of determining that the existing conditions meet all program(s) requirements.
11. **I understand SoCalGas is not responsible for items lost, stolen or destroyed in transit or during installation or inspection of energy-efficiency measures.**
12. I understand that the incentives amount provided by SoCalGas is NOT GUARANTEED and it may change based on a number of factors including, but not limited to, the verification of the modeling simulation performed by SoCalGas.
13. I understand that I cannot receive energy-efficiency incentives for the same measures or for the replacement of the measure installed from more than one California investor-owned utility or other third party programs offering rebates, financing, and other incentives funded with CPUC Public Goods Charge funds.

I understand and acknowledge that I am hereby requesting an incentive reservation from SoCalGas for the project listed below, which will be installed at the address specified on this Incentive Reservation Form. I am the property owner of the detached single family residence with an active meter(s) served by SoCalGas at the address specified on this Incentive Reservation Form. This reservation will be in effect for sixty (60) calendar days commencing from the date I receive Confirmation of Incentive Reservation. Incentive reservations are subject to program Terms and Conditions set forth in the Energy Upgrade California Reservation Package which I have read and hereby acknowledge. Incentive reservations do not guarantee future payment under the program. SoCalGas reserves the right to modify or reject any reservation request that, in SoCalGas's sole judgment, contravenes the policies, procedures or purposes of the Energy Upgrade California program. Property Owner signatures are required

_____	X _____	_____
SoCalGas Account Holder Name (Please Print)	SoCalGas Account Holder Signature	Date
_____	X _____	_____
Property Owner Name (Please Print)	Property Owner Signature	Date
_____	X _____	_____
Contractor Name (Please Print)	Contractor Signature	Date

This program is funded by California utility customers and administered by Southern California Gas Company, under the auspices of the California Public Utilities Commission.

Section 1: Required Customer Information

Customer Information	
First and Last Name (as it appears on SoCalGas bill)	Property Address
SoCalGas Service Account Number	City, State, Zip
Incentive Applicant First and Last Name	Mailing Address (if different from property address)
Email address	City, State, Zip
Telephone Number	Alternate Telephone Number

For Property Owner if Property Owner is Not Residing at the Address	
Property Owner First and Last Name (if different from customer)	Telephone Number
Mailing Address	Alternate Telephone Number
City, State, ZIP	Email Address

Prime Contractor Information	
EUCA Contractor ID#	Contractor Business Name
Contractor Contact Name	Telephone Number
	Email Address

Property Information (fill in and check all that apply)	
Number of Stories: Foundation Type:	
Year Built	Attic Ventilation Fan Present?
Number of Occupants	Heating Fuel
Conditioned Square Footage	Fireplace/Wood Stove
Average Ceiling Height	Domestic Hot Water Fuel
Front Door Orientation	Pool Heating Fuel

How did you hear about Energy Upgrade California?
<input type="checkbox"/> Article <input type="checkbox"/> Referral <input type="checkbox"/> Web Search <input type="checkbox"/> Radio <input type="checkbox"/> Other:

Top Homeowner Priorities / Concerns / Motivations
1)
2)

Energy Upgrade California Program Packages: **Basic Package** **Advanced Package**

Planned Completion Date: _____

Section 2: Basic Package Existing Home Conditions

Basic Package Existing Home Conditions					
Does the home have central heating and/or cooling system?					
Has the home had duct sealing within the last 5 years?					
Has the home had air sealing within the last 5 years?					
Attic Insulation					
Attic Flats and Slopes*	R-Value	Insulation Type	Insulation Depth (in.)	Surface Area (sq. ft.)	Insulation Quality
Domestic Hot Water 1					
DHW Pipe Insulation?			Low-Flow Showerhead?		
			Quantity Installed:		
			Thermostatic Valve Control?		
			Quantity Thermostatic Valve Control:		

* Additional information will be provided on the main NOTES section below, as needed.

NOTES:

Section 3: Advanced Package Home Performance Assessment

NOTE: Home performance assessments (including visual inspection and testing) must be completed within the previous 12 months of the date of submission to Energy Upgrade California).

Attic Insulation					
Attic Flats and Slopes*	R-Value	Insulation Type	Insulation Depth (in.)	Surface Area (sq. ft.)	Insulation Quality

Wall Insulation			
Sidewall Sections**	R-Value	Insulation Type and Framing	Surface Area (sq. ft.)
Front of House			
Left Side of House			
Right Side of House			
Back of House			

Floor Insulation		
Floor Type**	R-Value	Surface Area (sq. ft.)

INSULATED SURFACES NOTES:

Walls adjacent to attic/garage/unconditioned space: _____ See main NOTES section for additional surfaces, if any.

Windows (select typical size)		
Orientation**	Window Type (framing, panes and glaze)	Total Area (sq. ft.)
Front of House		
Left Side of House		
Right Side of House		
Back of House		

Wall Insulation		Cooling System	
Heating System 1**		Cooling System 1**	
Heater Type		Cooling Type	
Fuel		Tonnage	
Manufacturer and Model		Model Year	
Model Year		Manufacturer and Model	
Output BTUs		SEER	
Eff. Rating (AFUE)		EER	
Eff. Rating (HSPF)		NOTE: load sizing calculations for projects with heating and/or cooling requirement must use the Job Reporting Template and Energy Pro software.	
Location			

Ducts			
Duct Pressurization Test Results (CFM25)**		How did you determine fan unit air flow?	
Percentage duct leakage to outside		Fan unit air flow	
Duct Insulation			

** Additional heating, cooling, duct, surface information will be provided on the main NOTES section below, as needed.

NOTES:

Domestic Hot Water 1		
Type:	Output BTUs:	Low-Flow Showerhead:
Model Year:	Efficiency (EF):	Qty. Installed:
Fuel:	Tank Wrapped:	Thermostatic Valve Control?
Gallons:	DHW Pipe Insulation:	Qty. Thermostatic Valve Control?

Appliances, Lighting, T-Stats, Other	
Kitchen Refrigerator Usage (kWh/yr):	Clothes Washer in Conditioned Space:
Second Refrigerator/Freezer Usage (kWh/yr):	Clothes Dryer in Conditioned Space:
Dishwasher Energy Factor:	Clothes Dryer Fuel:
Pool Heating Fuel:	Cooking Range/Oven Fuel:
Spa Heating Fuel:	# CO Detectors:
	# Smoke Detectors:

Blower Door Test and Ventilation Compliance								
	Worst Case Test Results			Natural Condition Test Results (if Failed Worst Case)			Flue Inspection	Action Required*
	Spillage	Draft (Pa)	Flue CO (ppm)	Spillage	Draft (Pa)	Flue CO (ppm)		
Heating System 1								
Heating System 2*								
DHW System 1								
DHW System 2*								
Other*								
	Location	CO Ambient (ppm)	Base Pressure	Worst Case Pressure	Final Net CAZ Depressurization	Limit for CAZ	Result	Action Required*
CAZ 1								
	List of CAZ 1 Appliances:							
CAZ 2								
	List of CAZ 2 Appliances:							
Gas Leak Testing: <input type="checkbox"/> No Leaks Detected <input type="checkbox"/> Leaks Detected as Noted:								
	Kitchen	Other**	Action Required:					
Ambient CO (ppm)								
	Fuel*	CO (ppm)	Vent Out?	Action Required:				
Oven								
Range								
Other Appliance:								
	Fuel*	Gas Properly Vented	Gas Improperly Vented	Action Required:				
Dryer Vent								

* As needed, list additional systems/zones/actions in the notes section; identify other systems/fuel types in NOTES section.

NOTES:

Reservation Confirmation (Utility Use Only)	
Enrollment Number: _____	Rep.: _____
Date of Request: _____	Date Confirmation: _____