2024 Multifamily Boiler Controller Rebate Application

Cash rebates are available for the installation of qualified energy-efficient products in existing residential multifamily apartment dwelling units and in common areas of apartment complexes, condominiums, and mobile home parks of two or more dwelling units on a multifamily rate (GR, GM)[1].

How To Apply

1. Read, acknowledge, and sign the Terms and Conditions (pages 2-3).

2. Qualified product(s) must be new, purchased, and installed between January 1, 2024 and December 31, 2024. Qualifying product(s) must be installed prior to submitting a rebate application. New Construction homes do not qualify.

3. A completed application must include all of the following items:

   ☐ A completed, dated, and signed application (original or digital signature required).

   ☐ Installers must complete both Pre/Post-Installation Checklist forms for all installed controllers and submit three (3) geotagged photos to specify exact locations. One (1) photo of the Water heating/Boiler system in its entirety showing there is only one boiler controller and no demand-controlled recirculation pump connected to the system. One (1) photo of the recirculation pump being plugged directly into the power surge. One (1) photo of the boiler controller showing model and serial number.

   Failure to provide, are deemed insufficient, or are not geotagged will result in a virtual or in-person inspection.

   ☐ A copy of a recent SoCalGas bill for the natural gas account serving the energy-efficient product(s). Address and account number must match the name, site address, and account number on the application.

   ☐ Provide a copy of **PAID-IN-FULL** receipts, contractor's or home improvement contractor's invoice(s). The Contractors State License Board (CSLB) requires that licensed contractors provide you with a Home Improvement Contract (HIC) if the materials and labor total for the product(s) and installation is $500 or more. It is recommended that you request an HIC from your contractor even if the contractor installation was less than $500. If an HIC is your proof of purchase, it must be the original given to you by your contractor and must be signed and dated by both you and your licensed contractor. If the signatures are not dated, the date that the HIC was written will determine the product purchase date. Cash on delivery (COD) and estimates are not acceptable proof of payment UNLESS the COD invoice is accompanied by a delivery receipt, or an install date is noted on the invoice.

   ☐ Receipts/invoices must show a zero balance and list:
   - Vendor Name and Info
   - Purchase Date
   - Product Manufacturer, Model Number, Serial Number(s)

   ☐ Complete Product Location Form to show where product(s) was installed, date purchased, and number of units served by the product(s).

   ☐ Please sign and date the Payment Release Authorization (Page 5). Original and digital signatures are acceptable. Complete rebate payee information fully so we are able to provide an accurate payment of rebate.

4. Applications must be postmarked December 31, 2024, or earlier, to be eligible for a rebate. ALL applications are processed on a first-come, first-served basis, upon receipt, until funds are depleted. **INCOMPLETE** and **INCORRECT APPLICATIONS CANNOT BE PROCESSED**. Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date.

   - Keep a copy of all mailed forms and required documents (including receipts and home improvement contracts) for your records.

   - Be prepared to participate in any required verification of installation(s). SoCalGas may verify the energy-efficient product(s), customer eligibility, and installation prior to payment of rebate.

   - If all program requirements are met, a rebate check is generally mailed within 90 days after SoCalGas approves a correct and completed application unless your application is selected for verification, which may add additional time.

If you have questions or would like to know if your property is eligible: Call 1-800-508-2348 or email **multifamilyrebates@socalgas.com**

E-mail your completed application packet to: **multifamilyrebates@socalgas.com**

Or mail it to:

SoCalGas, 2024 Multifamily Rebates Program
M.L. GT 20B3
P.O. Box 513249
Los Angeles, CA 90099-4722

1. To qualify for a SoCalGas Multifamily Energy Efficiency Boiler Controller rebate, customers must be on a Residential (GR) or Multifamily (GM) rate. Check your SoCalGas bill under "Current Charges" to find your rate. For more info on rates, visit: **socalgas.com/regulatory/tariffs/tariffs-rates.shtml**

Terms and Conditions

Original or digital signature required.

1. I understand that (a) applications are accepted on a first-come, first-served basis while funding is available, or until discontinued by the California Public Utilities Commission (CPUC), and must be postmarked by December 31, 2024, or earlier, to be considered eligible for a rebate, and (b) qualified products must be purchased and installed on or after January 1, 2024 and no later than December 31, 2024. I understand that these purchase and install periods will end earlier if funds are no longer available, and this program shall at all times be subject to change or termination without prior notice. INCOMPLETE and INCORRECT APPLICATIONS WILL NOT BE PROCESSED. Resubmitted applications are processed on a first-come, first-served basis, based upon the new receipt date.

2. I represent that I am either the property owner, property manager or an authorized agent for the property owner, of the residential multifamily dwelling described in this application, which is occupied by customers and has a valid meter(s) served by Southern California Gas Company ("SoCalGas"). I understand that I am only eligible to receive rebates for products that correspond directly to the type of service (i.e., natural gas distribution) for which my residential multifamily dwelling currently receives service from SoCalGas. Residential multifamily dwellings are defined as residential apartments, homeowners associations and/or mobile home parks with two or more units. The dwelling units must be fully constructed and occupied. New construction does not qualify.

3. I certify that the qualified energy efficiency product(s) were purchased and installed on or after January 1, 2024 and no later than December 31, 2024. These product(s) are for use in my residential multifamily dwelling or common area thereof.

4. I have submitted the required documents establishing proof-of-purchase for the product(s) applied for in this Application which are PAID-IN-FULL itemized sales receipt(s), paid contractor invoice or paid Home Improvement Contract (HIC), with manufacturer name(s), model number(s) and any other required documentation.

5. I certify that all energy-efficient product(s) were purchased new, and I understand that resale product(s) and product(s) leased, rebuilt, rented and received from insurance claims or won as a prize, or new parts installed in existing product(s) do not qualify.

6. I understand rebates will only be paid for product(s) that meet the program specifications described on the Rebate Products Forms and related Specifications sheets.

7. Rebates are generally considered subsidies for tax purposes and could be taxable income. I understand that I am urged to consult my tax advisor concerning the taxability of these rebates. Rebates greater than $600 will be reported to the IRS on Form 1099 unless I have checked corporation or exempt tax status above on Payee Information. I understand that SoCalGas is not responsible for any taxes that may be imposed on my business as a result of my receipt of this rebate.

8. I understand that the rebate amount cannot exceed the total of the purchase price and installation cost. Sales taxes and delivery are not included in the item's purchase prices.

9. In the event that I choose to participate in the On-Bill Financing Program offered by SoCalGas to obtain financing for the products listed in this rebate form, I understand that the terms and conditions of participation in the On-Bill Financing Program will control (including, without limitation, the calculation of the rebate amount for the products listed in this rebate form), any conflict between the terms and conditions applicable to participation in this program and the On-Bill Financing Program.

10. I understand the qualified products are recommended to be installed by a licensed Contractors State Licensing Board (CSLB) installer.

11. **I understand and agree that the choice of the energy-efficient product(s), selection of contractor, manufacturer, or dealer, purchase of materials, work performed and the payment thereof are my sole responsibility. I understand that SoCalGas makes no representations regarding any products or services, contractors, manufacturers, dealers, materials or workmanship, in each case, with respect to this program. I also understand that SoCalGas makes no warranty, whether expressed or implied, including warranty of merchantability or fitness for any particular purpose, use or application of the products, services or measures. I waive any and all claims against SoCalGas and its affiliates, and their respective directors, officers, employees and authorized agents ("SoCalGas Parties") and I will, to the fullest extent permitted under applicable law, indemnify and hold harmless each SoCalGas Party for any claims arising out of or relating to the installation and/or use of the energy-efficient products referred to in this Application or otherwise related to this program. Without limiting the generality of the foregoing, to the maximum extent permitted under applicable law, none of the SoCalGas Parties shall be liable hereunder 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. I agree that, to the maximum extent permitted under applicable law, none of the SoCalGas Parties shall have any liability whatsoever concerning the quality, safety or installation of the energy-efficient products, including their fitness, workmanship or any other matter.**

12. I am responsible for meeting all program requirements and complying with my state/county/city governments, property owner, and/or homeowners' 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 rebated products are installed as per all manufacturers' specifications.

13. I agree to allow SoCalGas' representative and/or CPUC representative reasonable access to verify the installed product(s). I agree to this inspection to be eligible to participate in the program and receive a rebate for the qualified product. I understand this inspection is for the purpose of determining that the installed product(s) meet all program(s) requirements. I understand that SoCalGas may conduct an on-site or virtual inspection using video calling applications to verify the energy-efficient product(s) installation prior to rebate payment.

14. I understand that SoCalGas is not responsible for items lost or destroyed in the mail/transit.

15. I understand that I cannot receive a rebate for the same product or equipment from more than one California investor-owned utility or third-party energy efficiency program offering rebates, financing or other incentives funded with CPUC Public Purpose Surcharge funds.

Terms and Conditions *(Continued)*

Property Owner or Manager Signature (signature required)

☐ **I certify that the information i have provided is true and correct and the product(s) for which i am requesting a rebate meet(s) the requirements listed on the rebate products form and specification sheet.**

Check One: ☐ Property Owner ☐ Property Manager (as authorized agent for Property Owner)

As applicable:
☐ By checking this box, I acknowledge the qualified products are recommended to be installed by a licensed Contractors State Licensing Board (CSLB) installer and follow the applicable permitting requirements for this installation.

Print Name	Signature	Date

Funding is limited. Please call to make sure rebate applications are still being accepted. Applications are accepted on a first-come, first-served basis. Products must be purchased and installed between January 1, 2024 and December 31, 2024, however, please be aware these purchase and install periods will end earlier if funds are no longer available. This program shall at all times be subject to change or termination without prior notice. This program is funded by California utility customers and administered by Southern California Gas Company under the auspices of the California Public Utilities Commission.

2024 Boiler Controller Rebate Application Form

Must be completed fully to be processed.

☐☐☐–☐☐☐–☐☐☐☐–☐
SoCalGas Account Number

Name (as it appears on your SoCalGas bill)

Property Owner or Manager Information

Check One: ☐ Property Owner ☐ Property Manager (as authorized agent for Property Owner)

Name

Daytime Phone Number

Email

Property Information

Please include site contact best suited to coordinate a property inspection (as needed) for rebate processing.

Site or Complex Name

Year Property Built

Apartment Units in Complex

Units Served by Water Heater or Boiler

Site Contact Person/Inspection Contact Title

Site Contact Daytime Phone Number

Site or Product Location Address (if multiple, attach separate sheet)

City

ZIP

Contractor Information

☐ Non-corporation ☐ Exempt (e.g., tax exempt, non-profit)

CSLB Number

Contractor Name/Representative

Installer Name

Daytime Phone Number

Email

Payee Information (must be completed)

Tax Status: ☐ Corporation ☐ Non-corporation ☐ Exempt (e.g., tax exempt, non-profit)

Payee Name (make rebate check payable to) _____ Federal Tax ID Number or SSN _____

Mailing Address _____ City _____ ZIP _____

Payment Release Authorization (signature required)

PROPERTY OWNER OR PROPERTY MANAGER, AS AUTHORIZED AGENT FOR PROPERTY OWNER: Your authorization is required if the rebate check is to be made payable to another individual or entity. By signing below, I am authorizing this payment of my rebate to the third party ("Payee") named above and I understand that I will not be receiving a rebate check from SoCalGas. I also understand that my release of the payment to the Payee does not exempt me from the rebate requirements outlined in this application. If Payee is a business, federal tax ID or Social Security Number must be provided. Southern California Gas Company will report this payment made to the third party on IRS form 1099 as "Other Income" to you (the customer receiving the benefit of the rebate payment) unless the payment is less than $600, or you have identified yourself as a corporation or exempt. You are urged to consult your tax advisor concerning the tax requirements of rebates. Southern California Gas Company is not responsible for any taxes that may be imposed on you as a result of this rebate.

Print Name _____ Signature _____ Date _____

Energy Savings Assistance Program℠

Energy Savings Assistance Program and California Alternate Rates for Energy (CARE) Program information: Before starting your energy efficiency project, did you know your tenants may qualify for no-cost home improvements through the Energy Savings Assistance Program and/or a 20% discount on monthly energy bills through the CARE Program? For more information, visit **socalgas.com/assistance**. Or, call 1-800-331-7593 to learn about Energy Savings Assistance Program services and 1-800-427-2200 for CARE Program details.

Product And Rebate Specification Form

Read the product specifications below before purchasing. Rebates are not available if there is an existing operable demand recirculation pump controller. or if the property has previously participated in the Boiler Controller or a program similar. Customer of record is encouraged to contact us at the phone/email above.

	Product	For Common Area (A)	Quantity Installed (B)	Total Rebate (A x B)
1	**Serving 35 Units Or Less** Rebate applies to new installations on existing natural gas-fired domestic hot water common systems serving multifamily dwelling units. Controllers must serve a multifamily building up to 35 units, provide the ability to lower temperatures during low-use periods and have a by-pass capability to allow service to the boiler. Must have natural gas distributed to the installation address by SoCalGas. Central Domestic Water Heating (CDWH) system must be in proper working condition to qualify. *Manufacturer name, serial number, make and model number must be included with a copy of your receipt.*	**$700**		
2	**Serving 36 Units Or More** Rebate applies to the new installations on existing natural gas-fired domestic hot water common systems serving multifamily dwelling units. Controllers must serve a multifamily building of 36 units or greater, provide the ability to lower temperatures during low-use periods and have a by-pass capability to allow service to the boiler. Must have natural gas distributed to the installation address by SoCalGas. CDWH system must be in proper working condition to qualify. *Manufacturer name, serial number, make and model number must be included with a copy of your receipt.*	**$1,400**		
			Total Rebate Amount	**$** 0

Product Location Form

Form must be fully completed for rebate to be processed. A SoCalGas representative may conduct an inspection to verify the product(s) purchased and installed.

It is highly recommended that the controllers for your domestic hot water heater system be installed by a licensed Contractors State Licensing Board (CSLB) installer. Contractors are required to submit geotagging information (an electronic tag that assigns a geographical location to a photograph or video) to document the exact product installation location as part of a completed application package.

Please provide instructions on where to find the property's newly installed boiler controller(s). Include the building #,

unit #, etc.: _____

Required Information	Example	Location 1	Location 2	Location 3	Location 4	Location 5	Location 6	Location 7
Product Location Address	1234 Maple St.							
Product Location	Apt. 101							
Type of Product Installed	Water heater							
Product Make	GE							
Product Model Number	HDA2000							
Number of Units Served by Product	1							
Common Area (L,B,P,O)*	L							
Geotagged Photos Submitted	√	☐	☐	☐	☐	☐	☐	☐
Serial Number	12345678							
Date Purchased	1/1/24							
Date Installed	1/15/24							

*Common area: L = Laundry Room, B = Boiler Room, P = Pool, O = Other (describe here—e.g., spa, utility room): _____

Contractor Pre-Installation Checklist

Property Information

Please provide map of property indicating the location of the boiler(s), hot water heater(s) and storage tank(s).

Controller Name _____

Meter Number _____

Apartments Units in Complex _____

Units Served by Water Heater or Boiler _____

Central Domestic Water Heating (Cdwh) Or Natural Gas End Use Information

Check yes or no for CDWH, if appliance or item is on the system on which the control will be installed.

Hot Water Use	CDWH	Hot Water Use	CDWH
Washer	☐ Yes ☐ No	Hydronic Heat	☐ Yes ☐ No
Swimming Pool	☐ Yes ☐ No	Other _____	☐ Yes ☐ No
Pipe Insulation	☐ Yes ☐ No	Isolation Valves	☐ Yes ☐ No
Existing Control	☐ Yes ☐ No	Bleeder Valve	☐ Yes ☐ No
Condition (e.g., leaks, overly hot)	☐ Yes ☐ No	Backflow Valve at CWS	☐ Yes ☐ No
Spa(s)	☐ Yes ☐ No	Anti-scald Mixing Valve	☐ Yes ☐ No
Return (HWR) Pipe Size:		Supply (HWS) Pipe Size:	
Pump Size:		Natural Gas Meter Configuration:	
Natural Gas Meter Configuration:		Natural Gas Meter Location:	

Boiler Or Water Heater Information

General Description of CDWH System _____

CDWH Location _____

Boiler Manufacturer _____ Boiler Model Number _____ Boiler Serial Number _____ Pressure Regulator _____ Living Units Served _____

Btu In _____ Btu Out _____ Boiler HP _____ Number of Burners _____ Age of Burners _____

Water Storage: ☐ Internal ☐ External ☐ Other

Water Information:

Temp of H_2O Out _____ Setting or Reading _____ Temp of H_2O In _____ Setting or Reading _____

Primary Loop _____ Location and Operation of Primary Loop _____

Contractor Post-Installation Checklist

Product Location

Contractor Information

☐ Non-corporation ☐ Exempt (e.g., tax exempt, non-profit)

Contractor Name

Installer Name (must have attended IOU Boiler Controller Seminar)

Contractor Signature

Date

Post-Installation Requirements

	Checklist Items
☐	Installed controls per manufacturer's specifications
☐	Verified that controls are operating as specified
☐	Left no safety hazards
☐	Removed all installation debris
☐	Provided operator's manual for control to site personnel
☐	Provided maintenance and safety recommendations to site personnel
☐	Instructed site personnel on system fault conditions to watch for
☐	Left contact information on control box
☐	Other (describe)

CDWH System Information

Action Taken	
Added supply (HWS) pipe insulation	☐ Yes ☐ No
Added return (HWR) pipe insulation	☐ Yes ☐ No
Pipe water leak repairs	☐ Yes ☐ No
Pump water leak repairs	☐ Yes ☐ No
Pump manufacturer	☐ Yes ☐ No
Wattage	☐ Yes ☐ No
Added backflow prevention valve	☐ Yes ☐ No
Added isolation valve	☐ Yes ☐ No
Added bleeder valve	☐ Yes ☐ No

Boiler Or Water Heater Information

General Description of CDWH System _____ CDWH Location _____

Boiler Manufacturer	Boiler Model Number	Boiler Serial Number	Pressure Regulator	Living Units Served

Btu In	Btu Out	Boiler HP	Number of Burners	Age of Burners

Water Storage: ☐ Internal ☐ External ☐ Other

Water Information:

Temp of H_2O Out	Setting or Reading	Temp of H_2O In	Setting or Reading

Primary Loop _____ Location and Operation of Primary Loop _____

The Multifamily Boiler Controller Rebate Program is funded by California utility customers and administered by Southern California Gas Company (SoCalGas) under the auspices of the California Public Utilities Commission. Program funds, including any funds utilized for rebates or incentives, will be allocated on a first-come, first-served basis until such funds are no longer available. This program may be modified or terminated without prior notice. The selection, purchase and ownership of goods and/or services are the sole responsibility of the customer. Customers who choose to participate in this program are not obligated to purchase any additional goods or services offered by manufacturer, vendor, service provider, or any other third party. **SoCalGas makes no warranty, whether expressed or implied, including warranty of merchantability or fitness for any particular purpose, use or application of selected goods and/or services selected by customer. SoCalGas does not endorse, qualify, or guarantee the work of any third party.** Eligibility requirements apply; see the program conditions for details.

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