



**Retrofitting or remodeling an existing home is an ideal way to save energy, money and conserve natural resources. And now, through Energy Upgrade™ California, SDG&E® customers can receive incentives to help them along the smart energy journey.**

## **Get incentives** **In just a few easy steps!**

Property owners of single-family homes are eligible for incentives of up to \$4,000 for installing energy-efficient measures on their homes. Property owners can choose between two paths for participation.

### **Basic Path**

To receive a \$1,000 incentive, a participating contractor must install ALL of the following measures as described below in accordance with program requirements. Except where noted, if one or more measures are already installed, the home is ineligible for the Basic Path.

1. Air sealing
2. Attic insulation to minimum R-38
3. Duct sealing of central duct system
4. Hot water pipe insulation wrap where accessible (existing wrap ok)
5. Certificate of combustion safety test
6. Thermostatic Shut Off Valve, (existing valve ok)  
(a small device that attaches to your existing shower that shuts off the shower once the cold water turns warm in order to save hot water until you are ready to enter the shower, at which point you simply turn the valve on to resume shower flow)

### **Advanced Path** **(Customized Approach)**

For incentives between \$1,250 and \$4,000, customers must install a mix of eligible measures per a pre-approved work-plan submitted by a participating contractor. Eligible measures must be evaluated by a certified Building Performance Institute Analyst and projects must show a minimum energy savings of 10% – 40%.

For complete SDG&E Energy Upgrade California program eligibility requirements and instructions, please read this application package in its entirety.  
**Questions? Visit [sdge.com/energyupgrade](http://sdge.com/energyupgrade) or call 1-800-644-6133**



## How to Apply

1. Review SDG&E's Energy Upgrade California Program application and eligibility requirements.
2. Enroll in MyAccount on *sdge.com* and take the SDG&E Home Energy Efficiency Survey at *sdge.com/saveenergy*. If you do not want to enroll in MyAccount you may complete a paper version of the survey by requesting one at **1-800-644-6133**.
3. Contact a participating contractor. Share the results of your Home Energy Efficiency Survey and discuss options.
4. Give incentive application to your contractor.
5. Your contractor will submit your incentive application, pre-installation contractor survey, proposed scope of work, and supporting documents prior to starting work.
6. Have the participating contractor install eligible energy efficiency products at your home.

Follow the checklist below to ensure proper handling of your incentive request. To receive an incentive, the following must be submitted to your contractor:

- Pages 3 & 4 - Customer Application (original)
- Page 5 - Survey Form
- Page 6 - Terms & Conditions (sign and date original)
- Required copies of product receipts and/or contractor agreement
- Sign Payment Release Authorization (page 3) if authorizing SDG&E to pay the incentive to another entity (e.g., installing contractor)

Upon completion and verification of work, an incentive check will be processed and mailed to the customer generally within six to eight weeks.

Terms and Conditions apply and funding is limited. Please call SDG&E at 1-800-644-6133 or visit us at *sdge.com/energyupgrade* to ensure incentive reservations are still being accepted and funds are still available for the products you are installing before submitting your reservation request. This program shall at all times be subject to change or termination without prior notice. Energy efficiency products must be installed by a participating contractor.

The Energy Upgrade California program is funded by California utility customers and administered by San Diego Gas & Electric Company (SDG&E®) under the auspices of the California Public Utilities Commission. Rebates and incentives are provided on a first-come, first-served basis until program funds are no longer available. SDG&E does not endorse or warrant any manufacturer's products and shall not be liable or responsible for claims arising out of the purchase and installation, use or performance of any product. California customers who choose to participate in this program are not obligated to purchase any additional services offered by the contractor.



**Section 1: Required Customer Information**

**Application Form**

**Customer Information**

First and Last Name (as it appears on SDG&E bill)	Property Address
	Mailing Address (if different from property address)
SDG&E Account Number	City, State, Zip
Incentive Applicant First and Last Name	E-Mail Address
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 incentive applicant)	Telephone Number
Mailing Address	Alternate Telephone Number
City, State, Zip	E-Mail Address

**Prime Contractor Information**

Contractor ID#	Contractor Business Name
Contractor Contact Name	Telephone Number
Contractor Contact Title	E-Mail Address

**Make Incentive Check Payable To:**

Payee Federal Tax ID or SSN			
Payee (Print Name)			
Mailing Address	City	State	Zip

**Payment Release Authorization**

PROPERTY OWNER UNDERSTANDS AND AGREES THAT BY SIGNING THIS PAGE, I AM AUTHORIZING THIS PAYMENT OF MY INCENTIVE TO THE THIRD PARTY NAMED ABOVE, AND THAT I WILL NOT BE RECEIVING THE INCENTIVE CHECK FROM SDG&E. I ALSO UNDERSTAND THAT MY RELEASE OF THE PAYMENT TO A THIRD PARTY DOES NOT EXEMPT ME FROM THE PROGRAM REQUIREMENTS OUTLINED IN THE APPLICATION PACKAGE. I AUTHORIZE THIS PAYMENT RELEASE ON CONDITION THAT THE THIRD PARTY HAS A CALIFORNIA STATE LICENSE BOARD LICENSE, IS THE INSTALLER OF THE PRODUCTS FOR WHICH I AM REQUESTING AN INCENTIVE.



**Section 1: Required Customer Information (continued)**

**Application Form**

**Incentive program (select one):**

- Basic Home Energy Upgrade Path: \$1,000
- Advanced Home Energy Upgrade Path:
  - 10% energy savings = \$1,250
  - 15% energy savings = \$1,500
  - 20% energy savings = \$2,000
  - 25% energy savings = \$2,500
  - 30% energy savings = \$3,000
  - 35% energy savings = \$3,500
  - 40% energy savings = \$4,000

**Total project gross costs (not including any incentives)**

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**Total project net costs (after all incentives including this one)**

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**Property type:**

- Single-Family Detached Home
- Single-Family Attached Home (up to four-plex)
- Condominium
- Apartment
- Mobile Home

**Do you:**

- Own
- Rent



**Section 1: Required Customer Information (continued)**

**Survey Form**

**How did you hear about Energy Upgrade California?**

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**What method did you use to complete SDG&E's Home Energy Efficiency Survey?**

- Online
- On paper

**Did the SDG&E rebate influence your decision to complete your energy efficiency project(s)?**  YES  NO

**Have you previously participated in any SDG&E incentive/rebate programs?**  YES  NO

**Did you finance any portion of this project?**  YES  NO

If so, please indicate type of financing:

- Government programs
- Private unsecured (i.e. personal loan, credit card)
- Private secured (i.e. mortgage, home equity line of credit)

**How many contractors did you interview prior to selecting a contractor?**

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**How many contractor quotes did you review prior to selecting a contractor?**

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**How long have you owned this home?**

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**May we contact you about your experiences in this program?**  YES  NO

**Would you like to be contacted regarding solar or other energy efficiency program offerings?**  YES  NO

**Did the contractor answer all of your questions?**  YES  NO

**Please check all that apply regarding why you chose to do this home energy-improvement project:**

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> High Bills           | <input type="checkbox"/> Odors           | <input type="checkbox"/> Door Problems      |
| <input type="checkbox"/> Drafts               | <input type="checkbox"/> Moisture Issues | <input type="checkbox"/> Environment        |
| <input type="checkbox"/> Hot/Cold Rooms       | <input type="checkbox"/> Water Leaks     | <input type="checkbox"/> Oil Dependence Use |
| <input type="checkbox"/> Air Quality Problems | <input type="checkbox"/> Window Problems |   |



## Terms and Conditions

1. I understand that incentive reservation requests and subsequent applications 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 or program is terminated before that date. Qualified energy efficiency measures are eligible for incentives if the corresponding incentive application is received by SDG&E no later than January 31, 2013.
  2. I am a property owner of a detached single-family residence with an active meter(s) served by SDG&E. I understand that I am only eligible to receive incentives that correspond directly to the type of service (e.g. natural gas or electric distribution) for which my detached single-family residence currently receives service from SDG&E. Detached single-family residence must be fully constructed. New construction does not qualify.
  3. I certify that the qualified energy efficiency measures were purchased and completely installed between January 1, 2010 and December 31, 2012. These energy efficiency measures are for use in my detached single-family residence.
  4. I have submitted one or more of the following required documents establishing proof-of-purchase for the energy efficiency measures applied for in this application: a) paid itemized sales receipt(s); b) building permits per local jurisdiction; c) 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 efficiency measures were purchased new and I understand that the following energy efficiency measures do not qualify: used, rebuilt, resale, rented, won as prizes, provided by insurance companies, or new parts installed in existing measures.
  6. I understand that incentives will only be paid for energy efficiency measures that meet the program specifications described on the incentives energy efficiency measures forms and related specifications sheets.
  7. 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. SDG&E may report my incentive payment to me on IRS Form 1099 unless I have checked corporation or exempt from reporting tax status. I understand that I should consult my tax advisor concerning the taxability of incentives. SDG&E is not responsible for any taxes that may be imposed as a result of my receipt of this incentive.
  8. I understand that incentives cannot exceed the combination of purchase price and installation cost.
  9. I understand that the qualified energy efficiency measures have been installed by a participating contractor in the basic path or the advance path.
  10. 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.
  11. The customer must complete a comprehensive Home Energy Efficiency Survey either online or complete a paper copy and mail it to the provided SDG&E address.
  12. I agree that SDG&E has no liability whatsoever concerning the quality, safety or installation of the energy efficiency measures, including its fitness for a particular purpose, workmanship, or any other matter.
  13. I understand that SDG&E is not responsible for items lost or destroyed in transit.
  14. 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 responsibility. I waive any and all claims against SDG&E, its parent company, its directors, officers, employees and authorized agents, and will indemnify SDG&E 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 SDG&E 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. Without limiting the generality of the foregoing, none of such parties shall 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.
  15. I agree to allow SDG&E's quality assurance team or its representatives and / or California Public Utilities Commissions (CPUC) representatives reasonable access to verify existing site conditions prior to the commencement of work, and I agree to this inspection to be eligible to participate in the program and receive incentives for the qualified measures. I understand that this inspection is for the purpose of determining that the pre-construction existing site conditions are as represented and that all proposed existing conditions and proposed measures meet all program requirements.
  16. I agree to allow SDG&E's quality assurance team or its representatives and / or California Public Utilities Commissions (CPUC) representatives reasonable access to verify the installed measures. 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 installed measures meet all program(s) requirements.
  17. I understand that I cannot receive energy efficiency incentives for the same measures, or for the replacement for the measure installed from more than one California Investor-Owned Utility or other third-party programs offering incentives, financing, and other incentives funded with CPUC Public Goods Charge funds.
  18. Property Owner: Your signature is required (page 3) if the incentive check is to be made payable to another licensed individual or entity.
  19. Proof of Property Ownership from owner, and a copy of a recent SDG&E bill from tenant are required when owner has purchased and installed measure in a rental home. Name and address shown on Proof of Ownership must match name and install address listed on the application form, and address shown on SDG&E bill must match the install address listed on the application form.
- [NOTE: Only the property owner or the entity that installed the measures at the site address named above, may receive the incentive payment]

I HAVE READ, UNDERSTAND AND AGREE TO THE ABOVE TERMS & CONDITIONS. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE ENERGY EFFICIENCY MEASURES FOR WHICH I AM REQUESTING A REBATE MEET THE REQUIREMENTS LISTED ON THE ENERGY EFFICIENCY MEASURES FORM AND SPECIFICATIONS SHEETS AND HAVE BEEN COMPLETELY INSTALLED.

Signature (Please Print Name)

Date (Month/Day/Year)



## Authorization to Release Customer Information

This Release is Completely Optional. As a convenience to the Customer, SDG&E is working with Local Governments to coordinate CPUC-funded programs with Local Government-funded programs. With Customer's approval, SDG&E will provide Local Governments with the customer information described below to enable Customer to be eligible for American Recovery and Reinvestment Act (ARRA) and other energy efficiency funds. If signed the Customer's information will no longer be confidential. This release is NOT required to participate in SDG&E's Energy Upgrade California Program.

I, \_\_\_\_\_ [print name of Customer], hereby authorize ("Authorization") SDG&E to release the following:

1. My customer information,
2. My property information,
3. My data regarding energy efficiency measures that I have installed or plan to install through the program including estimated KWh savings, estimated KW reduction, estimated therm savings, and estimated percent improvement in energy performance as documented in my Energy Upgrade California Application (the "Application"), and
4. My utility billing records for the 12 months prior to the date below, and the 12 months after the Date of Post Installation and Inspections Performed as specified in the Basic and Advanced Package Post Installation Test and Inspections Section of the Application

to Local Governments, and/or other American Recovery and Reinvestment Act (ARRA) fund recipients that are working in conjunction with SDG&E on the Energy Upgrade California Program and which customer information will be used for the following purposes:

- A. Program and incentive management,
- B. ARRA reporting by the local government to CEC and/or DOE, and
- C. Evaluation, monitoring and verification.

I hereby release, hold harmless, and indemnify SDG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from: 1) any release of information pursuant to this Authorization; 2) the unauthorized use of this information; and 3) any actions taken pursuant to this Authorization.

\_\_\_\_\_  
Authorized Customer Signature

\_\_\_\_\_  
(month / day / year)