

Advanced Home Upgrade Application



Eligibility Requirements

Your home must meet the following requirements:

1. Must use a participating Home Upgrade contractor
2. Modeled energy savings of 10% required.

How to Participate

1. Work with your contractor to develop an action plan based on the unique needs of you and your home.
2. A pre-inspection by an SDG&E® representative or our authorized representative may be required.
3. Have the participating contractor complete the upgrades to your home.
4. To receive an incentive, you must submit the following to your contractor:
 - Your completed application (all pages)
 - Copies of final itemized invoice and/or scope of work
 - Provide proof of permit closure
5. Upon completion and verification of work, you should receive an incentive check generally within six to eight weeks.

Project Information

Customer Information	
First and Last Name (as it appears on your SDG&E bill)	Property Address
	Mailing Address (if different from property address)
	City, State, Zip
SDG&E Account Number	Email Address
Telephone Number	Alternate Telephone Number
Property Owner Information (if different from Customer Information)	
Property Owner First and Last Name (if different from incentive applicant)	Telephone Number
Mailing Address	Alternate Telephone Number
City, State, Zip	Email Address

Terms and Conditions apply and funding is limited. Please call SDG&E at 1-800-644-6133 or visit us at sdgehomeupgrade.com 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.

Energy Upgrade California® Home Upgrade provides assistance and incentives for home improvement projects that can reduce energy use and make homes more comfortable. This statewide program is managed locally by utilities and regional energy networks 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.

Calculating My Incentive:

Your energy savings and corresponding incentive is calculated based upon a detailed home assessment and modeling of your home using complex software performed by your participating contractor. A pre-home inspection by SDG&E or its representatives may be required in order to verify existing modeled conditions prior to start of work. Your actual monthly energy savings will vary based on your monthly energy usage.

I understand that the incentive amount will be determined in accordance with program requirements and verified by SDG&E prior to and at the completion of the installation of energy-saving measures and a measurement of impacts of such measures utilizing complex software. I understand and acknowledge that any representations made to me by my participating contractor, while in good faith, but prior to SDG&E verification, are estimates only and could change upon final verification and modeling.

Signature (Please Print Name)

Date (Month/Day/Year)

Customer Survey

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

- High Bills Environment Home Repairs Home Re-Model
(windows, drafts, air quality)

2. How did you hear about Home Upgrade?

Please check from list below:

- Website (please specify) _____ Door to Door Campaign Friend/Referral (please specify)
 Event (please specify) _____ Letter/Direct Mailer _____
 Contractor Email Other _____

3. Did the incentive influence your decision to complete your energy efficiency project(s)? YES NO

4. Did you finance any portion of this project? NO YES. If yes, what financing did you use. _____

5. Do you: Own Rent

6. If you own your home, how long have you owned it? _____ YRS _____ MOS

7. May we contact you about your experience in this program? YES NO

Only complete this section if you are assigning payment to your contractor.

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.

Signature (Please Print Name) Date (Month/Day/Year)



Terms and Conditions

1. I understand that incentive 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, 2020 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 December 15, 2020.
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, 2020 and December 31, 2020. 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) paid contractor invoice; or paid home improvement contract (HIC), with manufacturer name(s), model number(s); and any other required documentation.
5. In accordance with California Public Utilities Code section 399.4(b), the customer (or their contractor) must provide SDG&E proof of permit closure before SDG&E will pay any rebate or incentive for the purchase or installation of central air-conditioning, heat pumps, or related fans.
6. 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.
7. 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.
8. 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.
9. I understand that incentives cannot exceed the combination of purchase price and installation cost.
10. I understand that the qualified energy efficiency measures have been installed by a participating contractor in the Home Upgrade or the Advanced Home Upgrade path.
11. 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.
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)

