SDG&E Home Upgrade Online Reservation & Application Contractor User Guide - Advanced Projects

SDG&E's Home Upgrade Program is transitioning to a web-based enrollment system. This will enable faster payments for applicants and contractors - and the ability to check the status of an enrollment online.

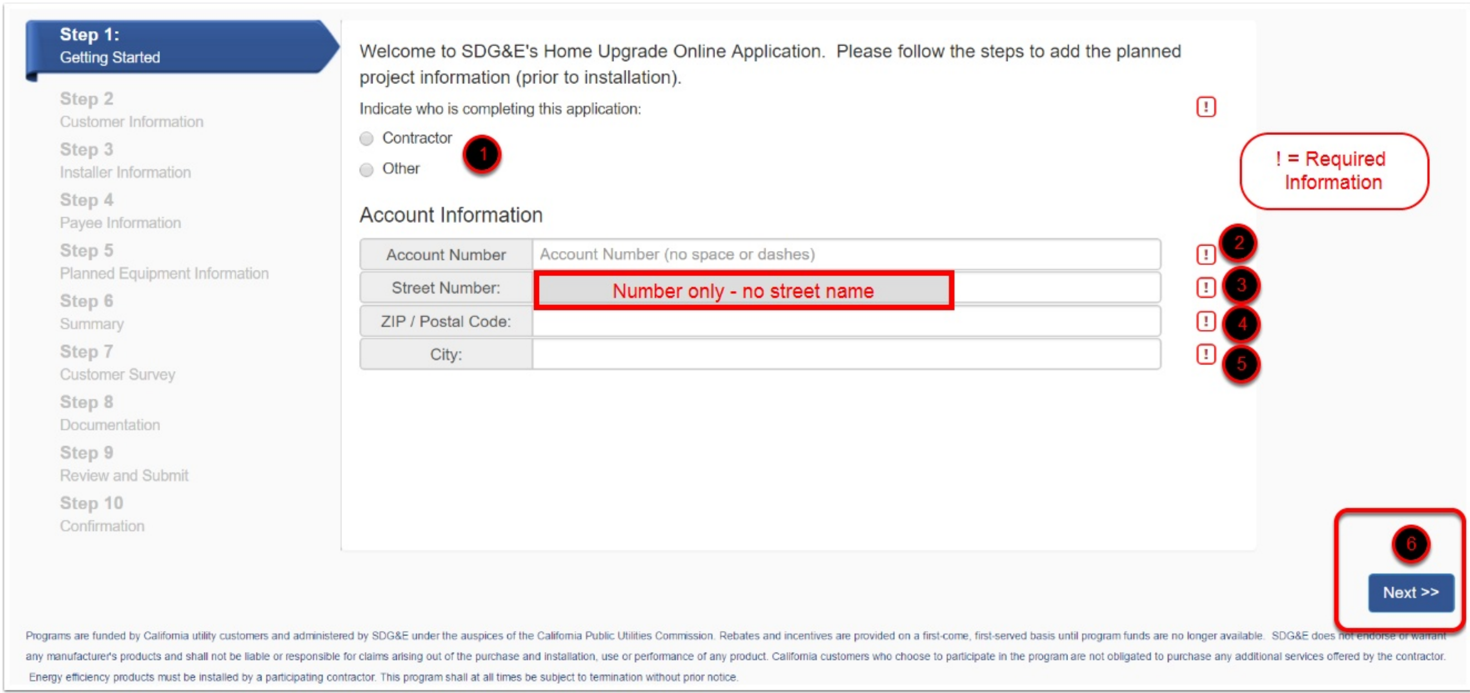
- Contractors will provide certain information and apply for funds when customer scope of work is completed - PRIOR TO INSTALLATION

High-level process:

1. Customers interested in the program will complete an online lead request and will receive an email directing them to next steps and a link to the contractor list.
2. After the scope of work has been determined, approved contractors will reserve online ***prior to installation.***
3. Project information will be reviewed and approved for installation.
4. Contractors may check the status of their projects using the online status check.
5. When installation is complete, required documents and information may be uploaded online.

1. Step 1 - Getting Started

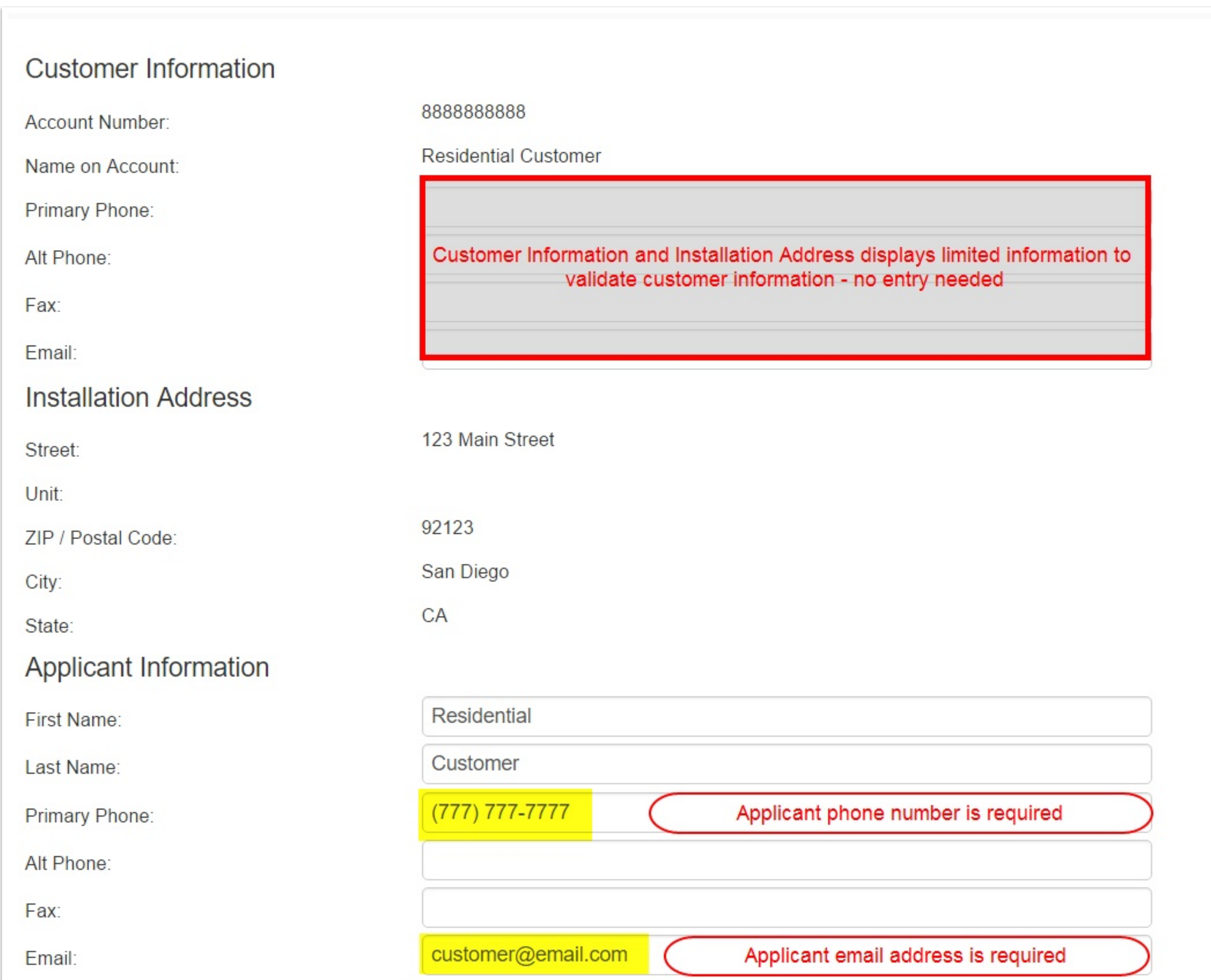
1. Indicate who is completing application - ***Contractor or Other (Rater or Project Manager)***
2. Enter ***10 digit, numeric, active SDG&E account number (remove last digit if customer provides 11-digit account number)***
3. Enter ***Street Number*** of applicant
4. Enter ***ZIP/Postal Code*** of applicant
5. Enter ***City*** - defaults to applicant city using ZIP code above
6. Click ***Next***


Step 1:
Getting Started
Step 2
Customer Information
Step 3
Installer Information
Step 4
Payee Information
Step 5
Planned Equipment Information
Step 6
Summary
Step 7
Customer Survey
Step 8
Documentation
Step 9
Review and Submit
Step 10
Confirmation
Welcome to SDG&E's Home Upgrade Online Application. Please follow the steps to add the planned project information (prior to installation).
Indicate who is completing this application:
Contractor
Other
1
! = Required Information
Account Information
Account Number
Account Number (no space or dashes)
2
Street Number:
Number only - no street name
3
ZIP / Postal Code:
4
City:
5
6
Next >>
Programs are funded by California utility customers and administered by 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 the program are not obligated to purchase any additional services offered by the contractor. Energy efficiency products must be installed by a participating contractor. This program shall at all times be subject to termination without prior notice.

2. Step 2 - Customer Information

1. Enter ***Applicant Primary Phone Number***
2. Enter ***Applicant Email Address***

Note: Applicant is the person listed on the signed application. If a renter is the account holder listed in the customer information section and the homeowner is making upgrades to the property, the Applicant/Homeowner should be listed in the Applicant Information Section.



Customer Information

Account Number: 8888888888

Name on Account: Residential Customer

Primary Phone:

Alt Phone:

Fax:

Email:

Customer Information and Installation Address displays limited information to validate customer information - no entry needed

Installation Address

Street: 123 Main Street

Unit:

ZIP / Postal Code: 92123

City: San Diego

State: CA

Applicant Information

First Name: Residential

Last Name: Customer

Primary Phone: (777) 777-7777 Applicant phone number is required

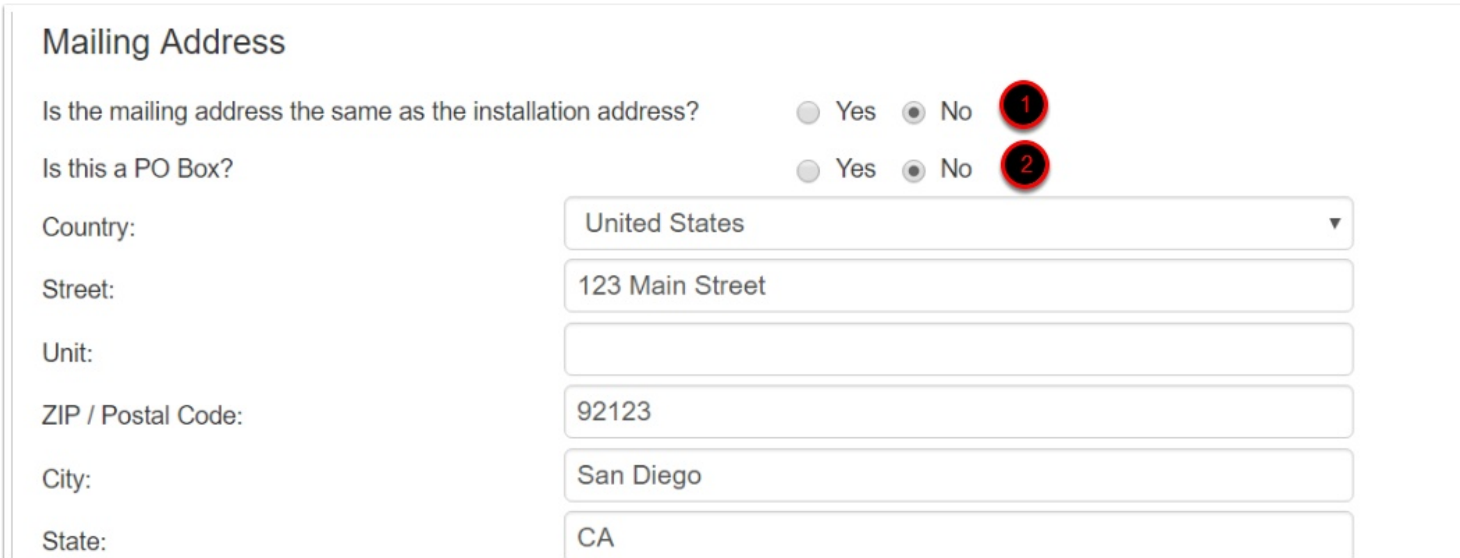
Alt Phone:

Fax:

Email: customer@email.com Applicant email address is required

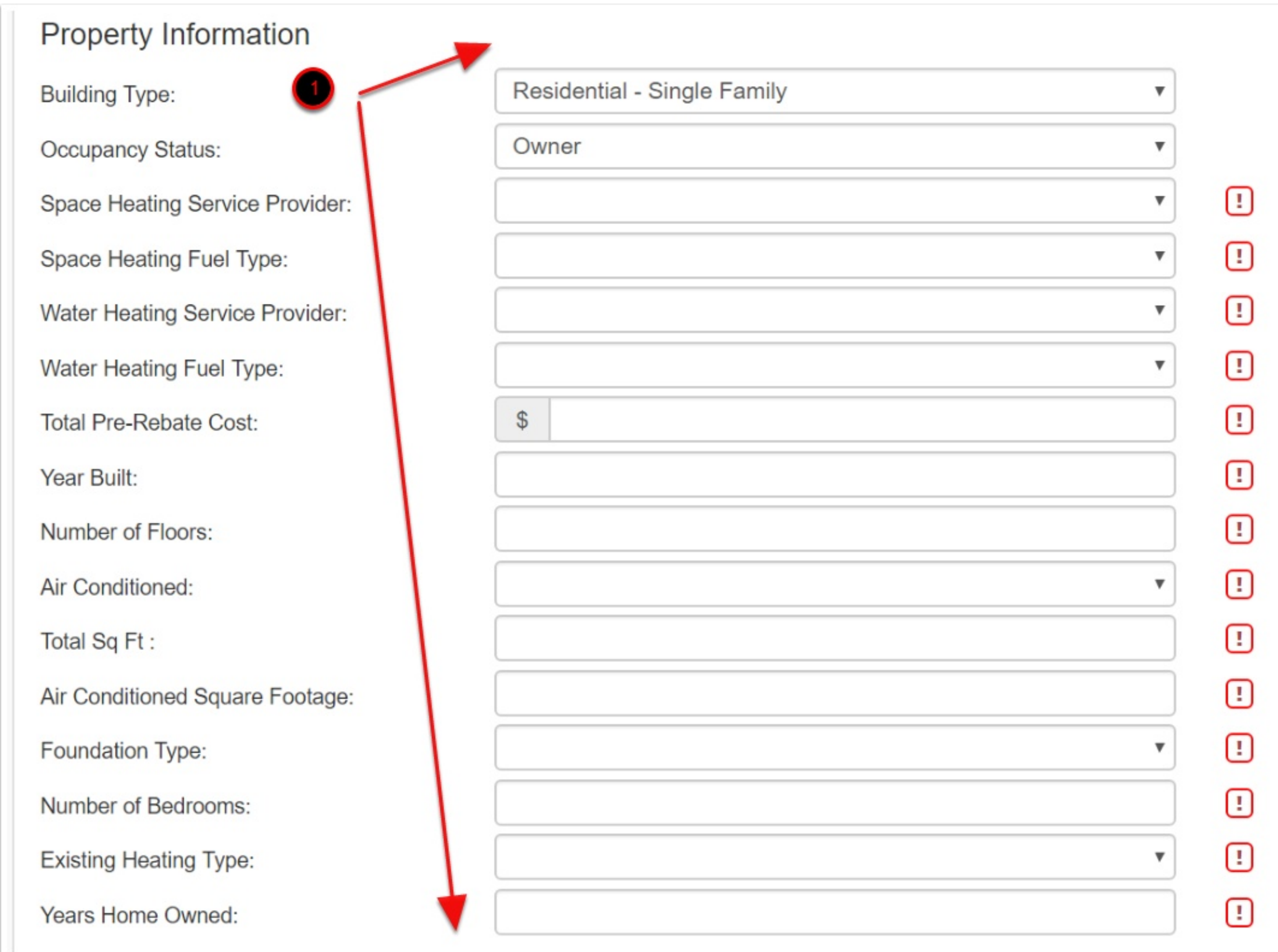
2.1

1. Mailing Address - ***Select Yes or No***
2. PO Box - ***Select Yes or No***



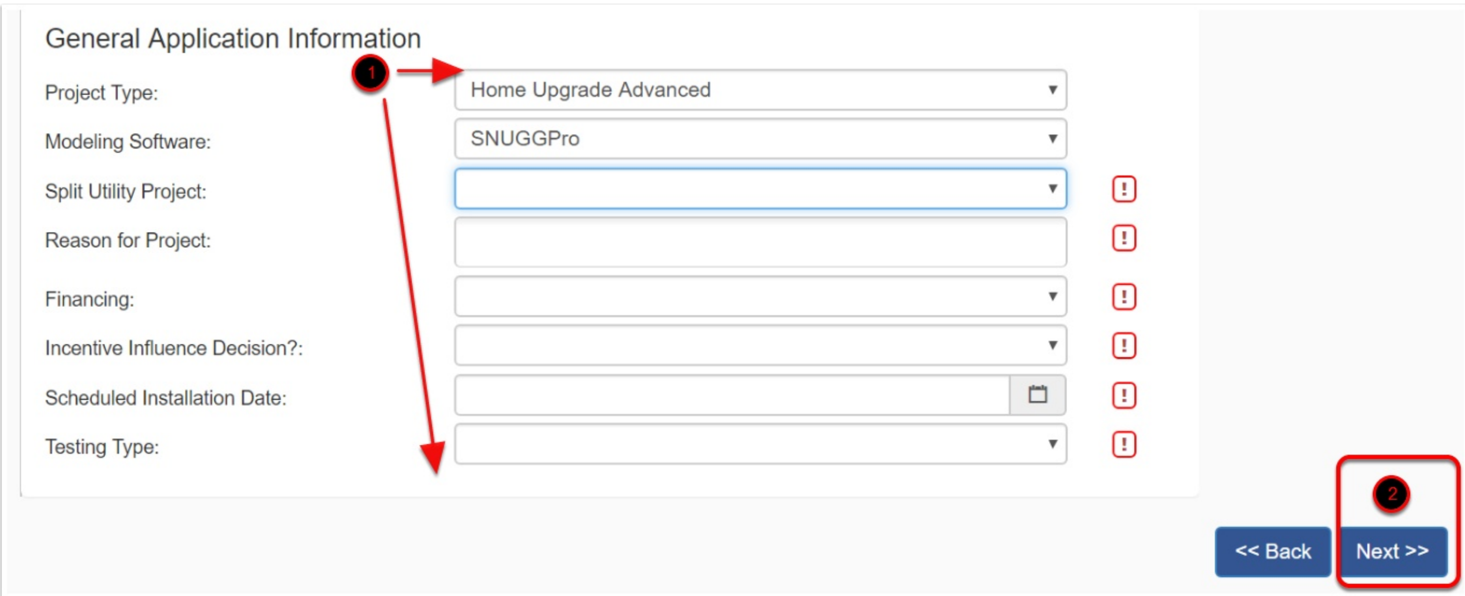
2.2

1. Property Information - ***Complete property information based on scope of work signed by applicant***



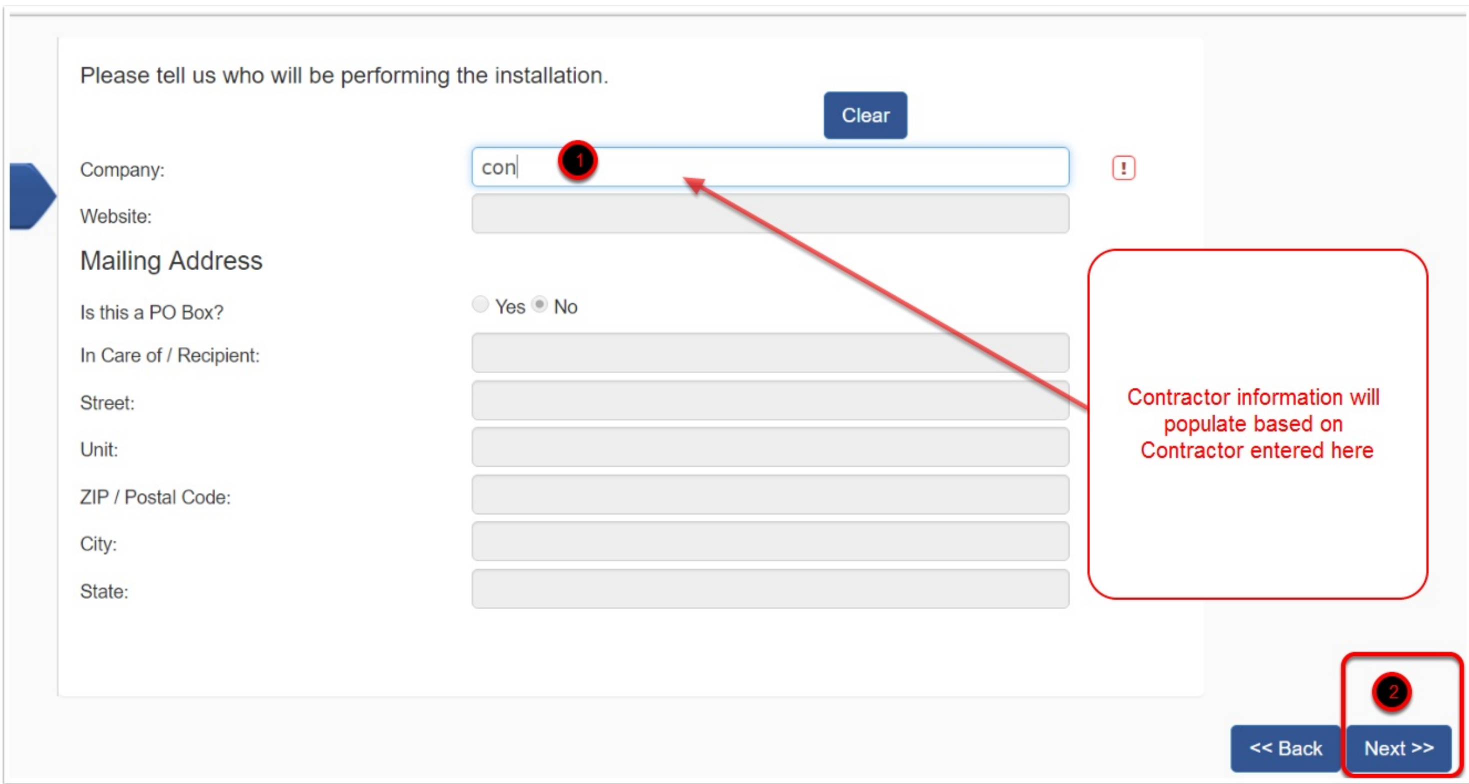
2.3

1. Populate all required information
2. Click ***Next***



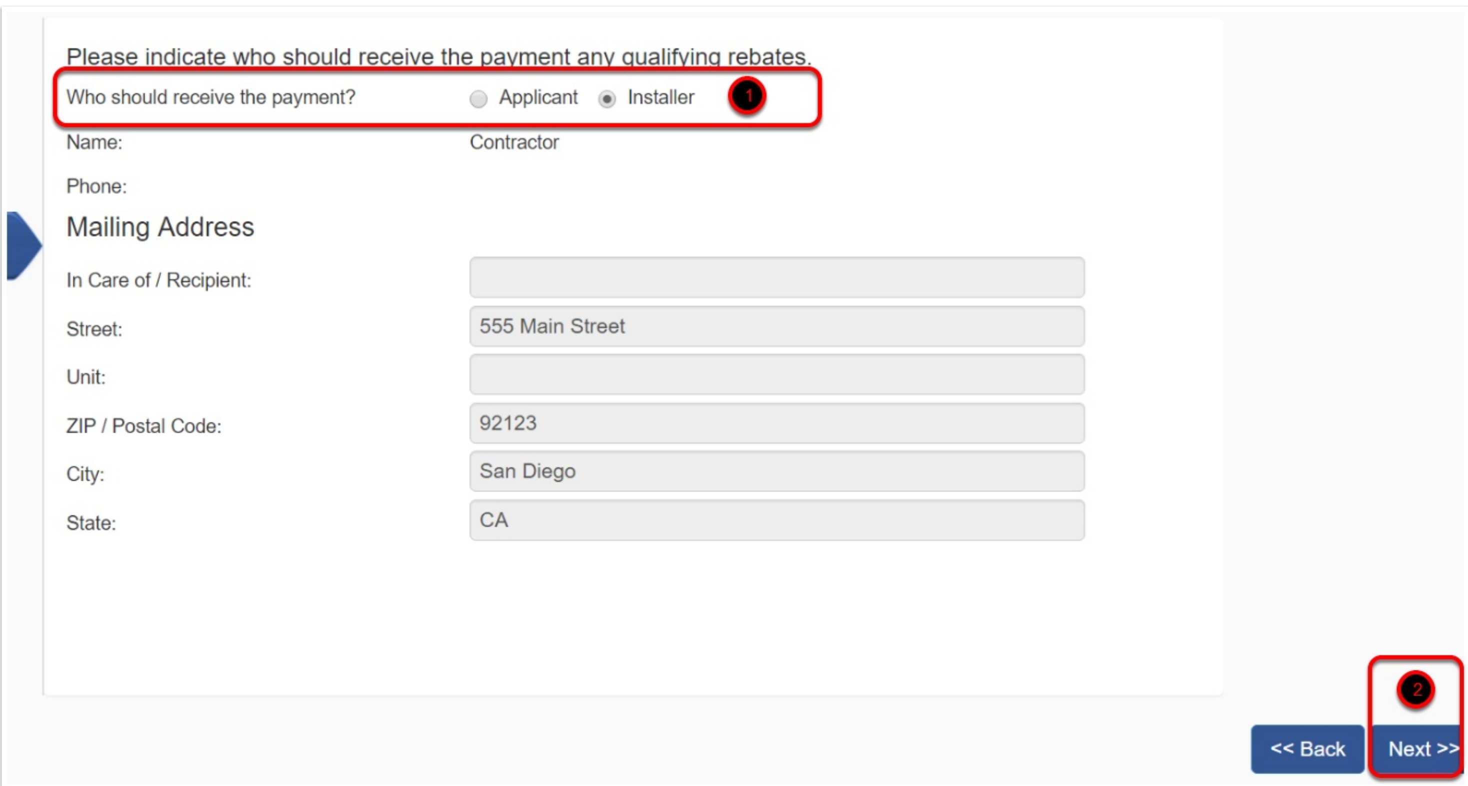
3. Step 3 - Installer Information

1. Enter ***Company Name*** - Type the first two letters of the contractor name and the list will populate - select contractor name from list. The remaining fields will populate address information (only approved Home Upgrade contractors will populate this field).
2. Click ***Next***



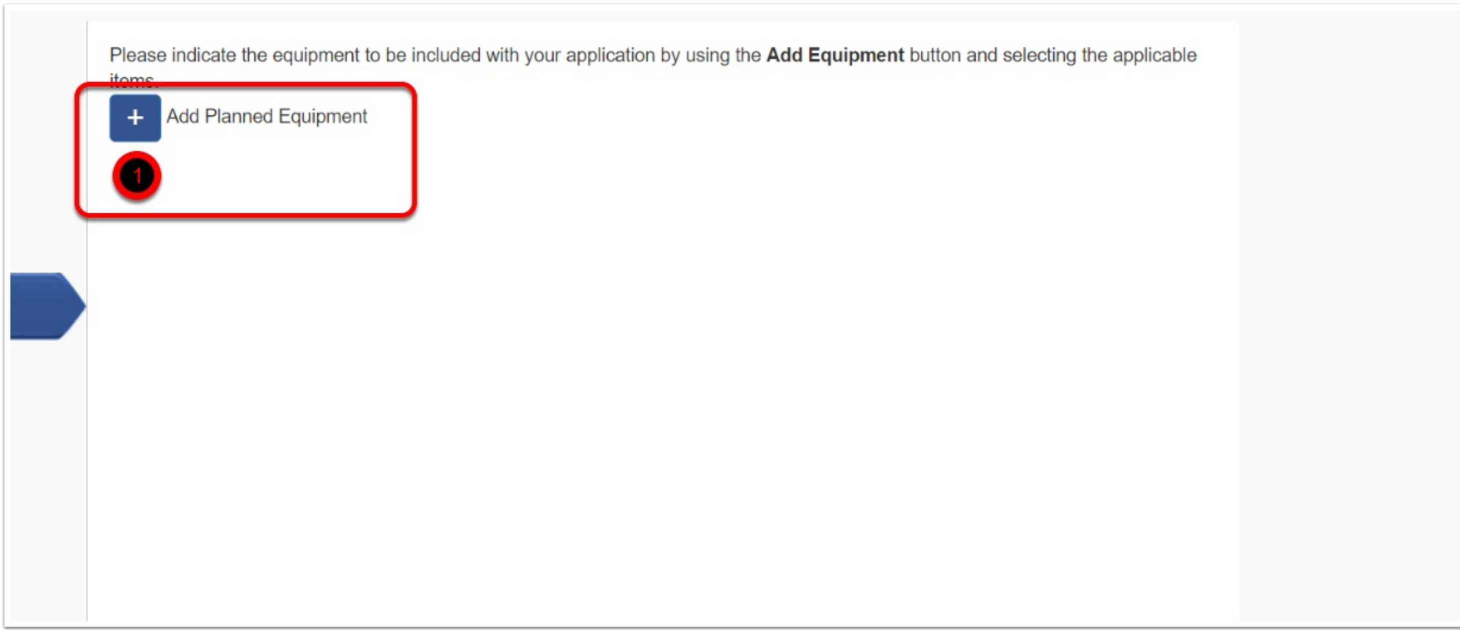
4. Step 4 - Payee Information

1. Select who will receive rebates - ***Select Applicant or Installer*** (if Applicant is selected, screen will populate from Applicant listed on Step 2).
2. Click ***Next***



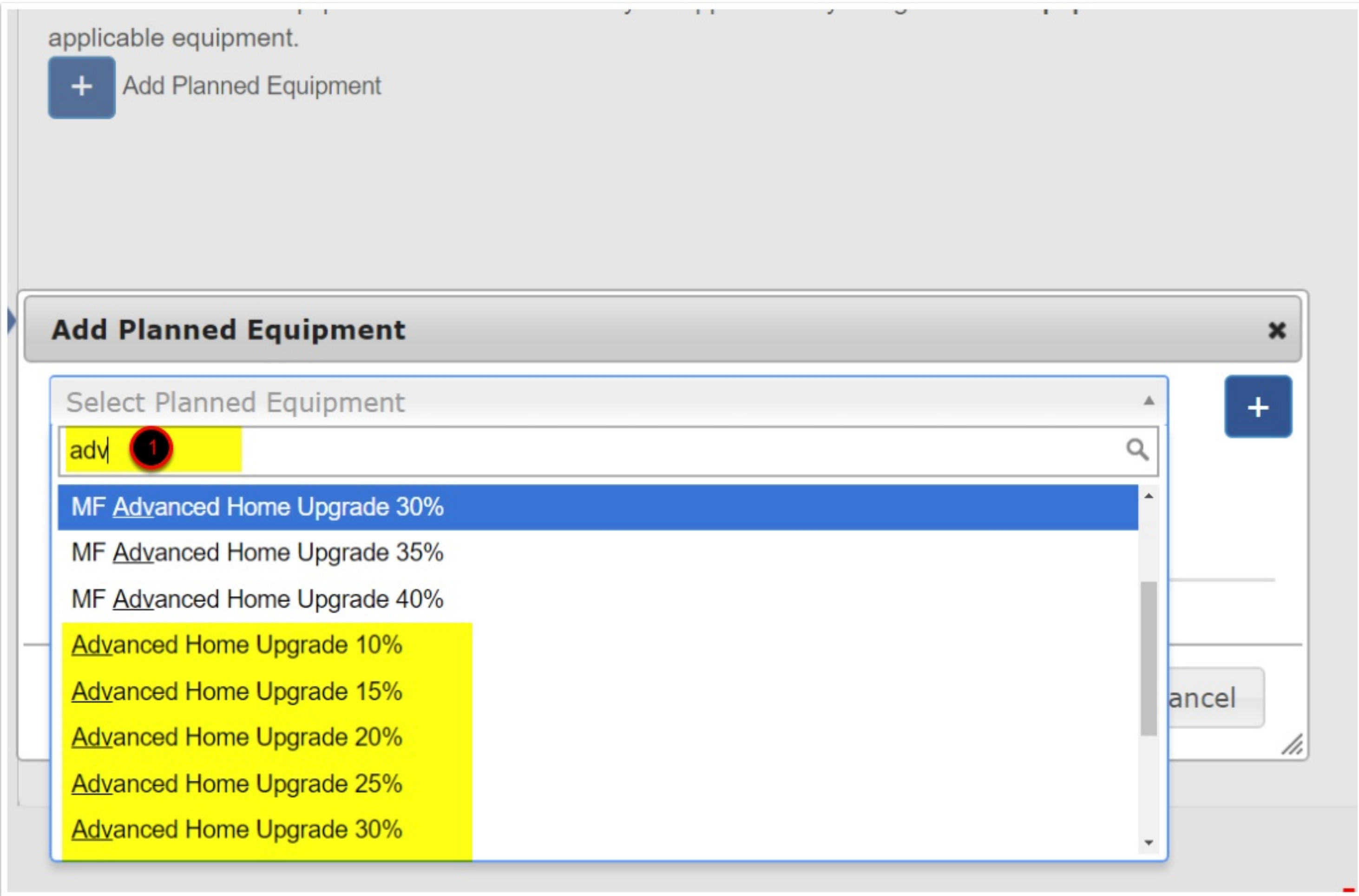
5. Step 5 - Planned Equipment

1. Click ***Add Planned Equipment***



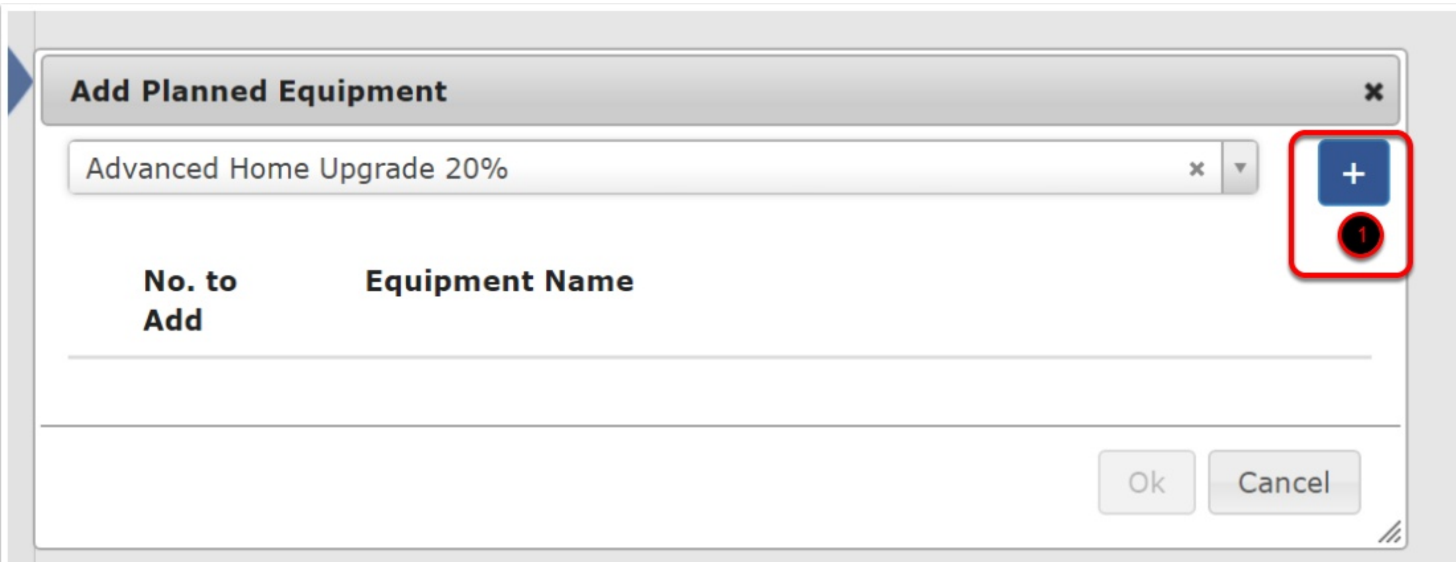
5.1

1. Enter Adv into the search field - this will display a list of Advance Home Upgrade savings options - select the one that matches the model output.



5.2

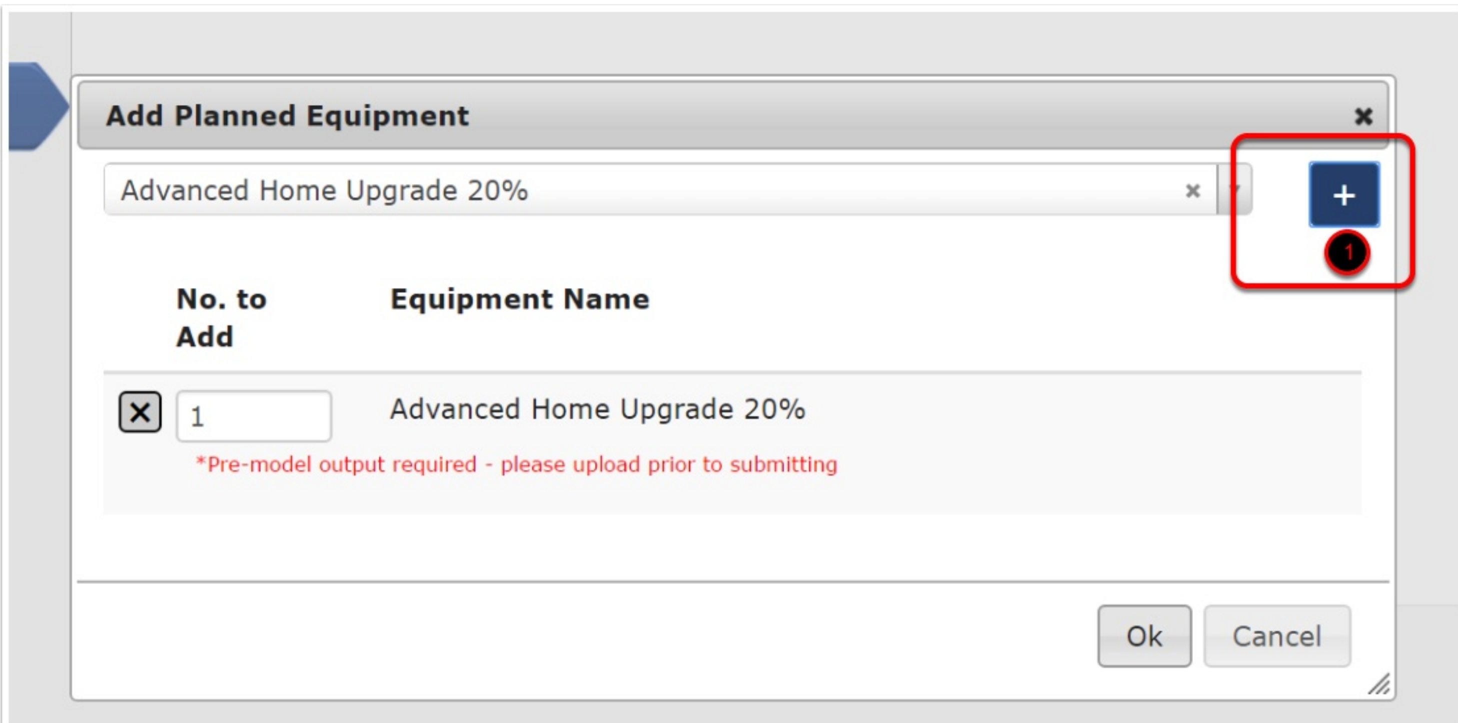
1. Once the % measure is selected - Click **+** to add to reservation



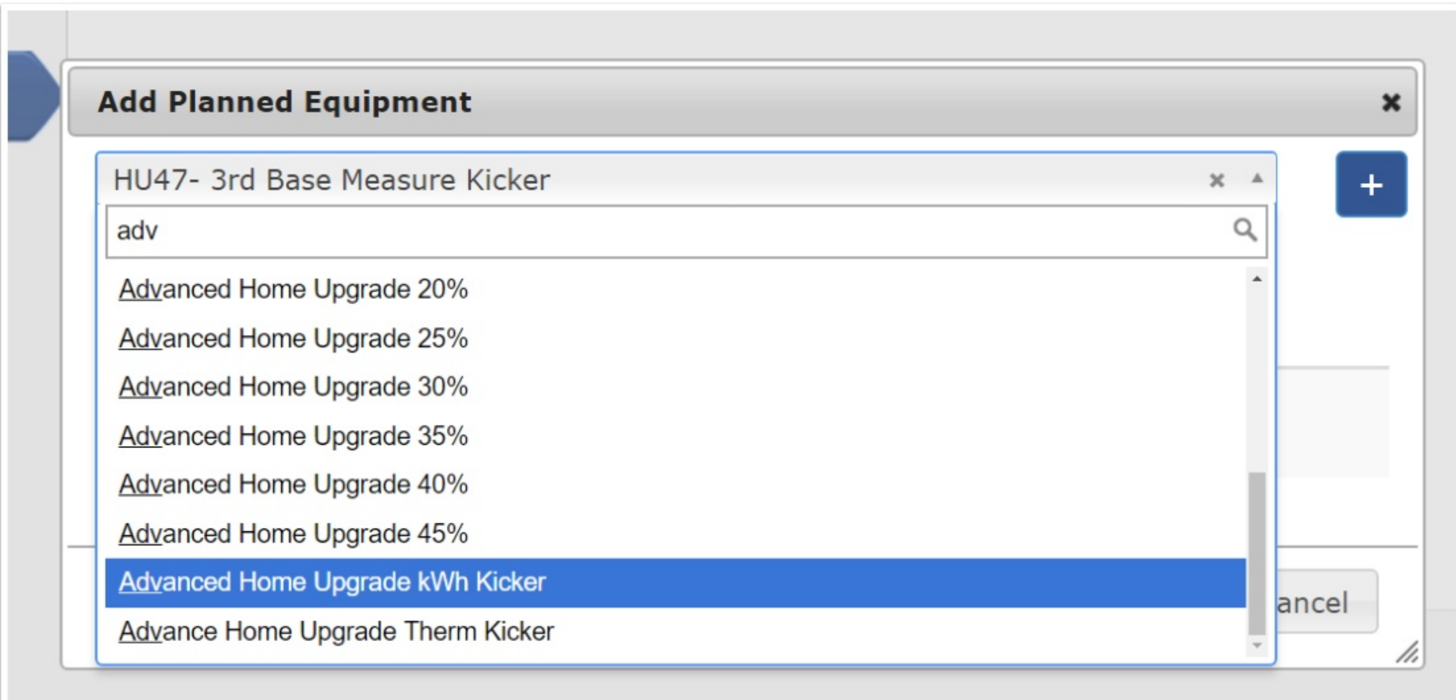
5.3

1. Click + to add kicker measure(s).

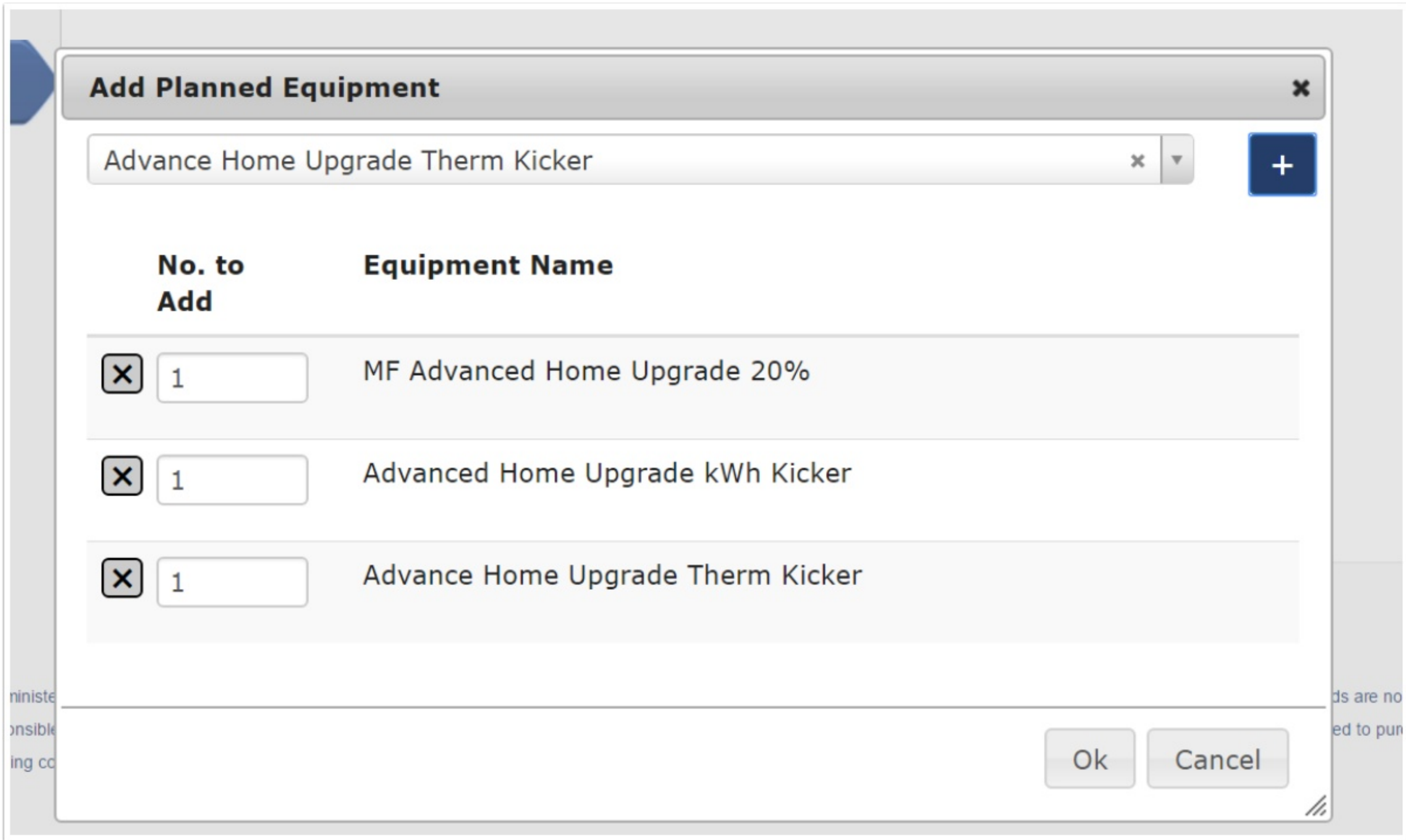
Note - Advanced Projects should only display one planned % measure.



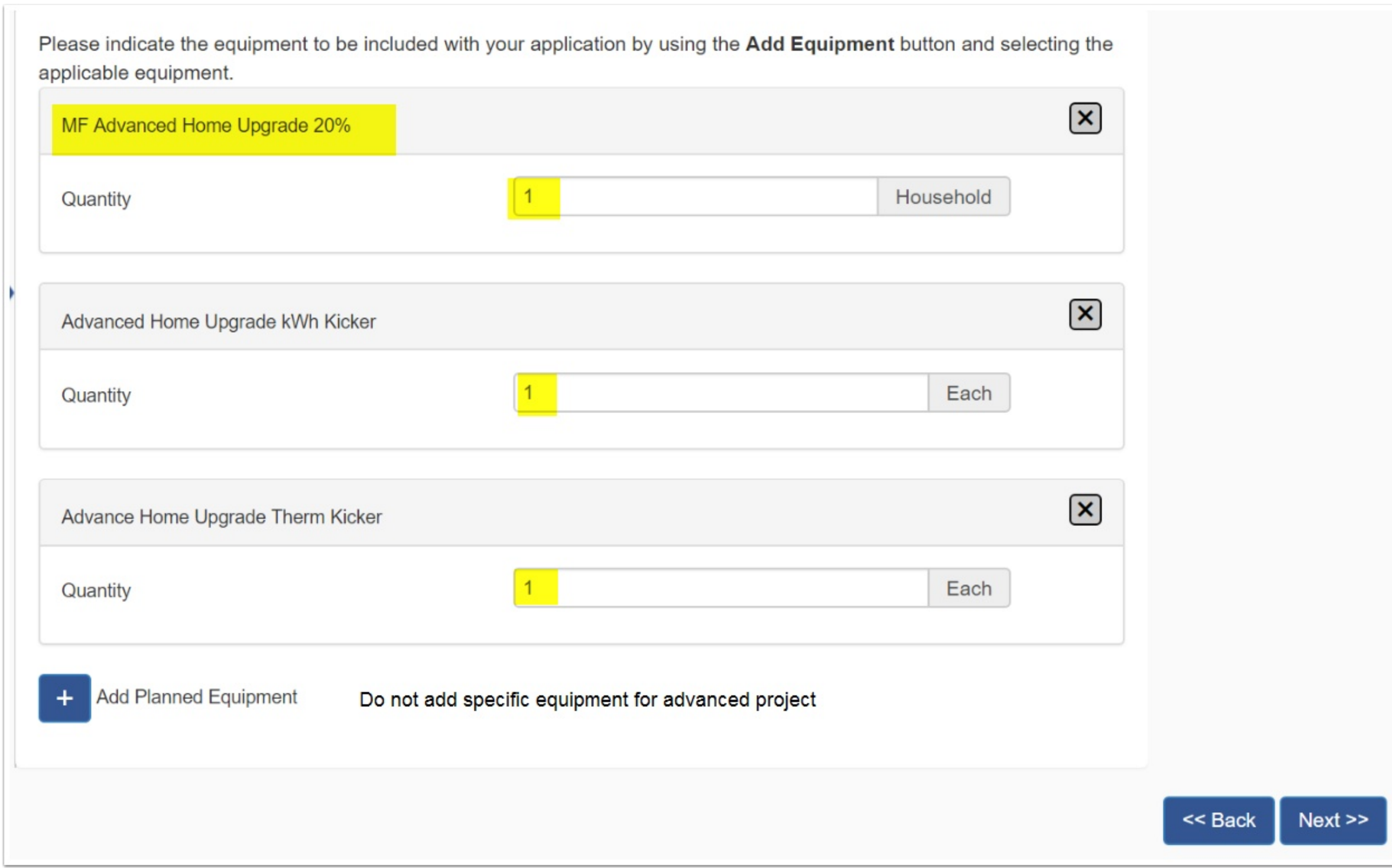
5.4


Add Planned Equipment
HU47- 3rd Base Measure Kicker
adv
Advanced Home Upgrade 20%
Advanced Home Upgrade 25%
Advanced Home Upgrade 30%
Advanced Home Upgrade 35%
Advanced Home Upgrade 40%
Advanced Home Upgrade 45%
Advanced Home Upgrade kWh Kicker
Advance Home Upgrade Therm Kicker
ancel

5.5

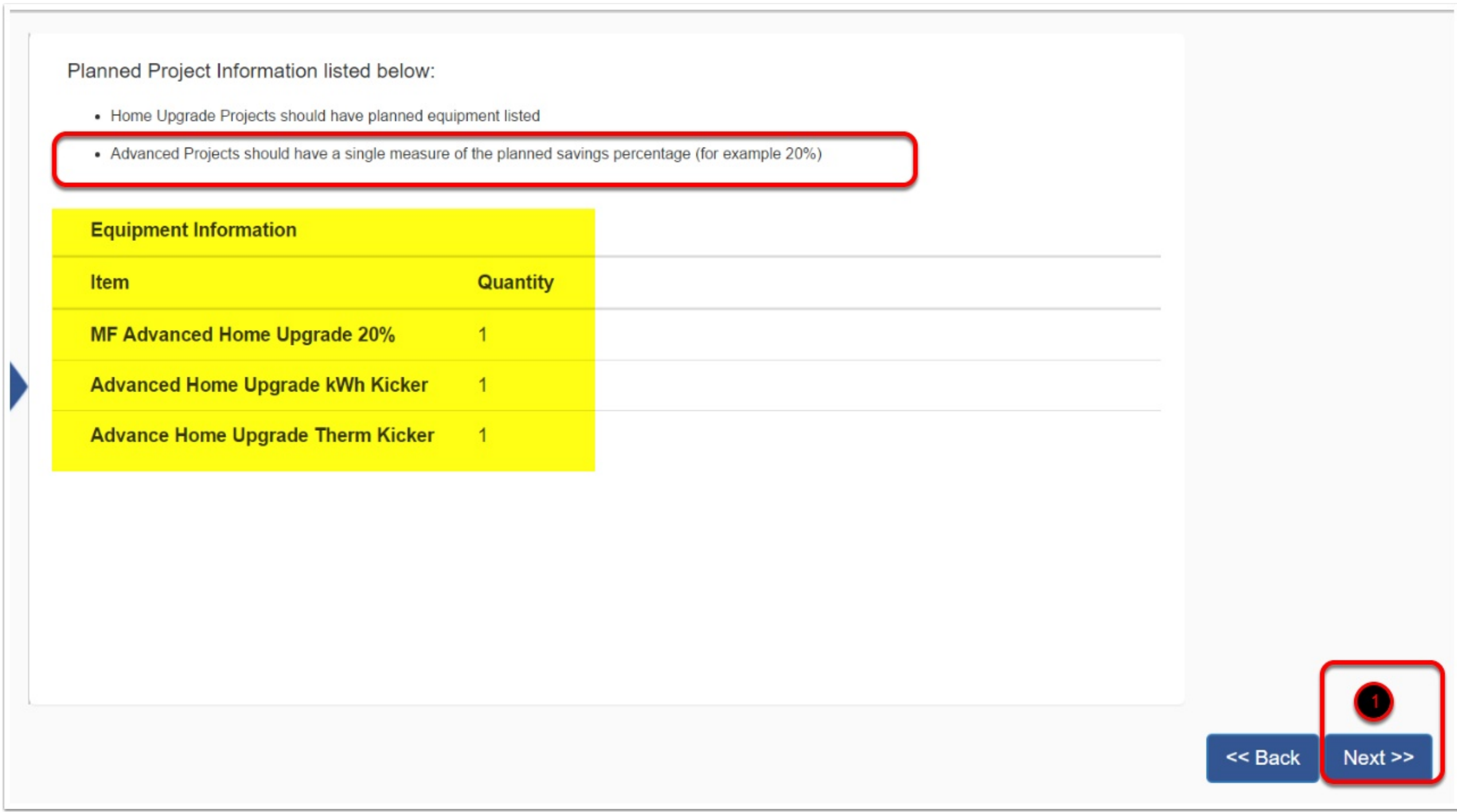

Add Planned Equipment
Advance Home Upgrade Therm Kicker
No. to Add
Equipment Name
1
MF Advanced Home Upgrade 20%
1
Advanced Home Upgrade kWh Kicker
1
Advance Home Upgrade Therm Kicker
Ok
Cancel

5.6


Please indicate the equipment to be included with your application by using the **Add Equipment** button and selecting the applicable equipment.
MF Advanced Home Upgrade 20%
Quantity
1
Household
Advanced Home Upgrade kWh Kicker
Quantity
1
Each
Advance Home Upgrade Therm Kicker
Quantity
1
Each
+ Add Planned Equipment
Do not add specific equipment for advanced project
<< Back
Next >>

6. Step 6 - Planned Project Summary

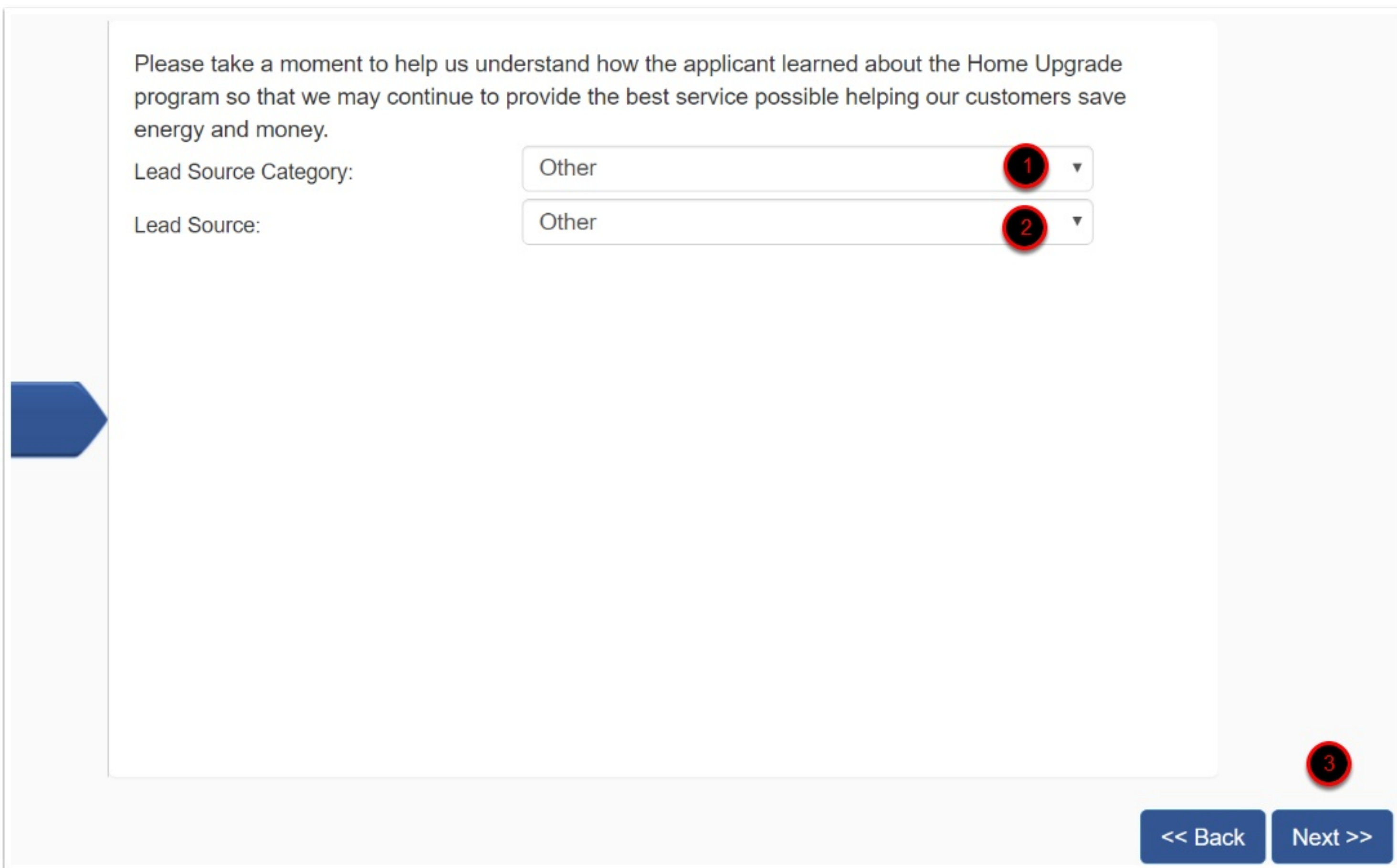
1. Click ***Next*** to continue



7. Step 7 - Customer Survey

1. Enter ***Lead Source Category***
2. Enter ***Lead Source***
3. Click ***Next***

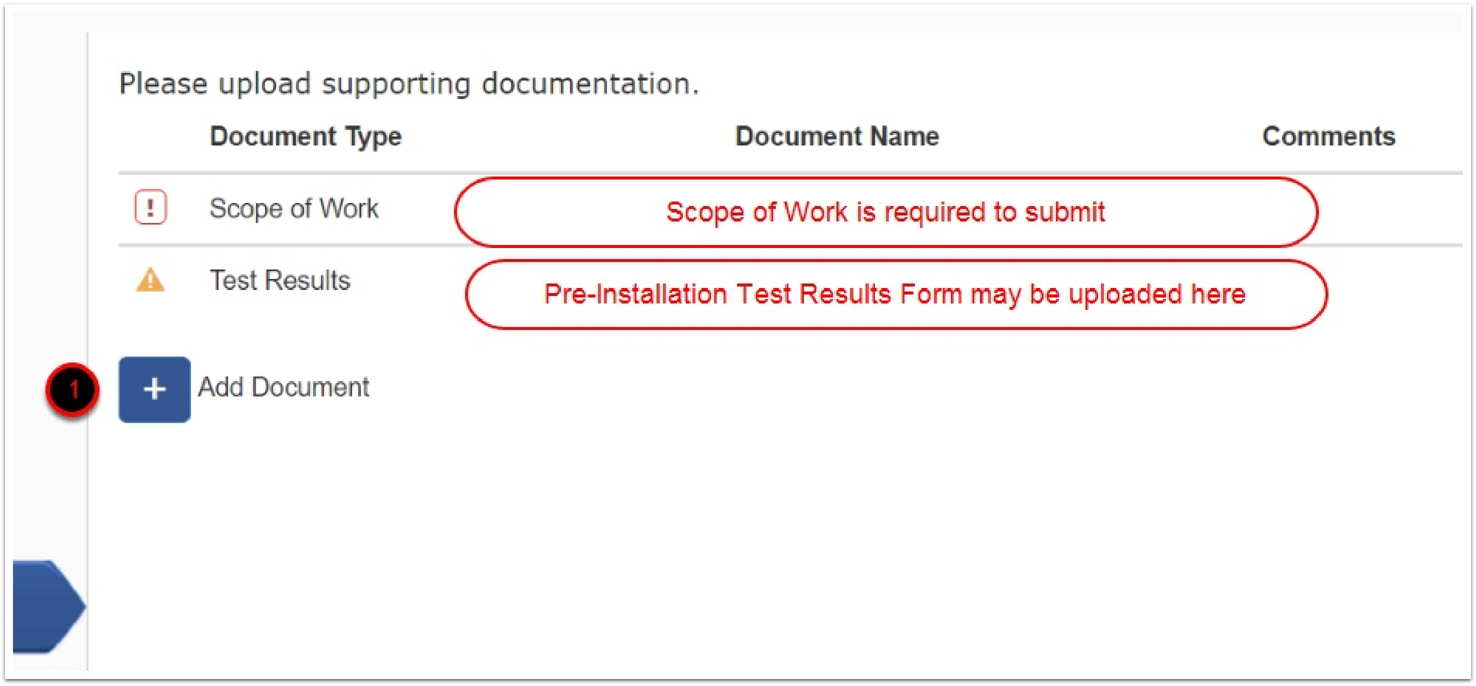
Note: If customer learns about program from Home Upgrade contractor, select *Lead Source Category: Third Party Implementer/ Lead Source: Contractor/Industry Professional.*



8. Step 8 - Documentation

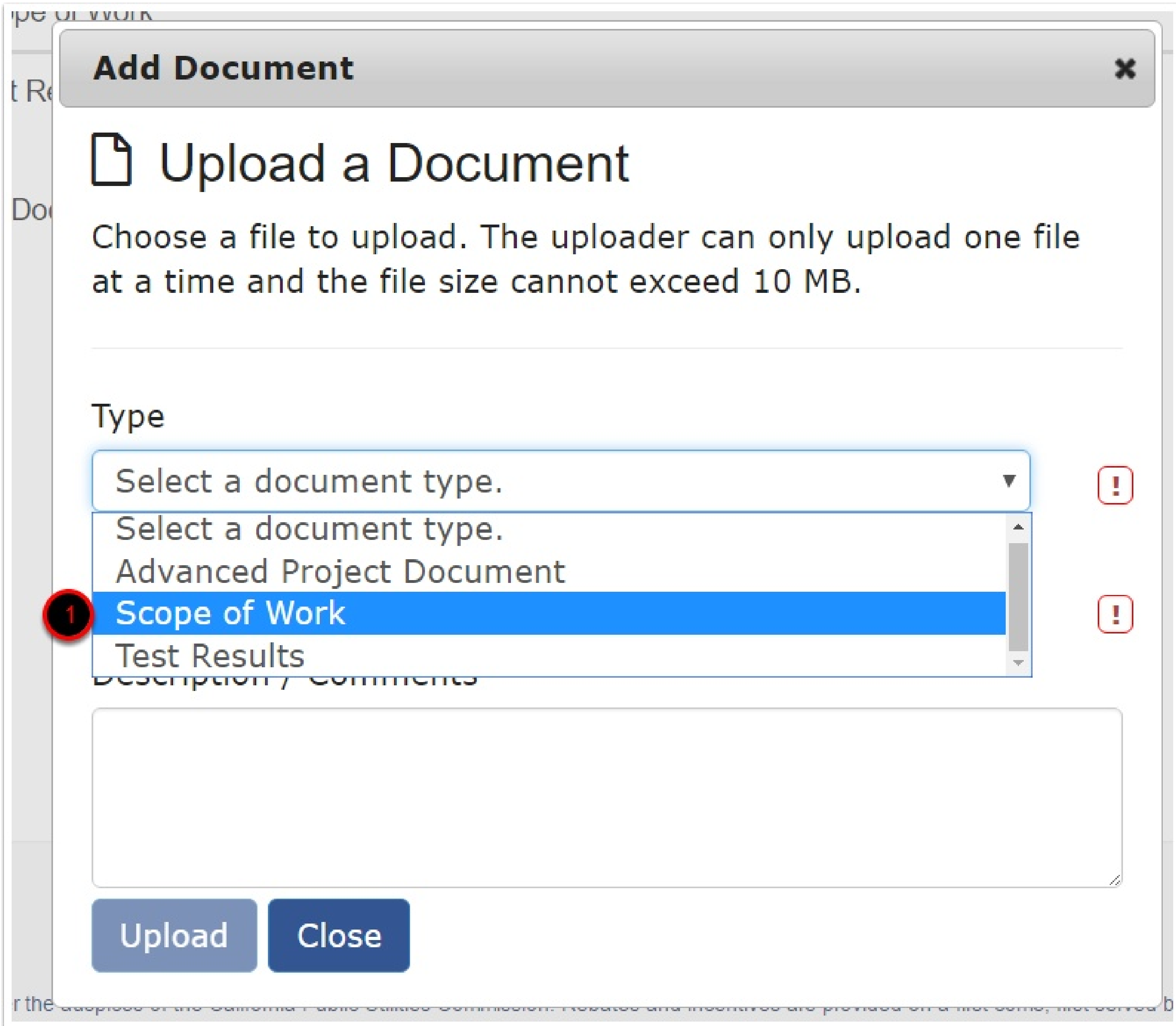
A signed scope of work is required to submit planned equipment.

1. Click ***Add Document*** begin upload from your computer



8.1

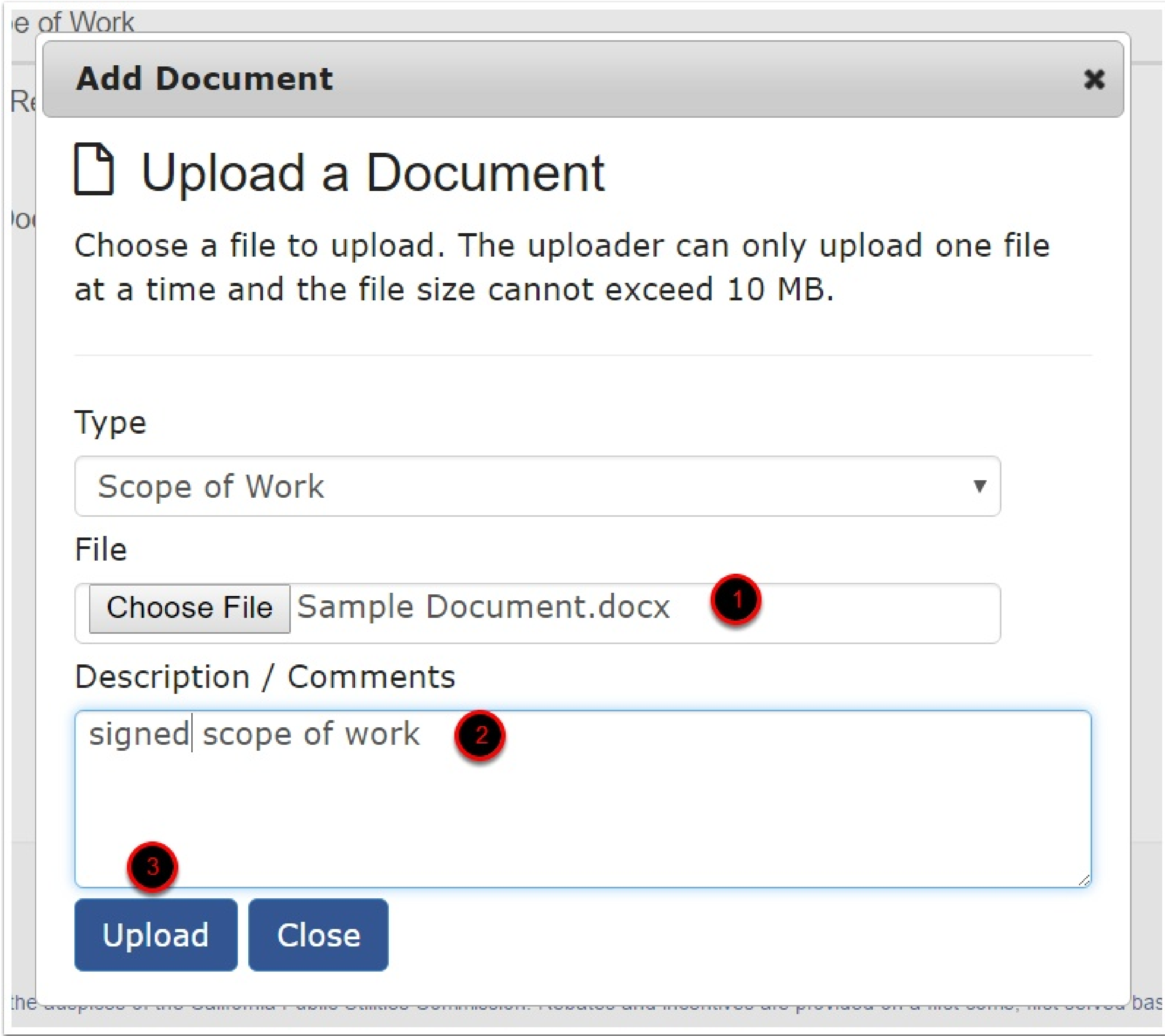
1. Select ***Document Type*** - ***Scope of Work***



8.2

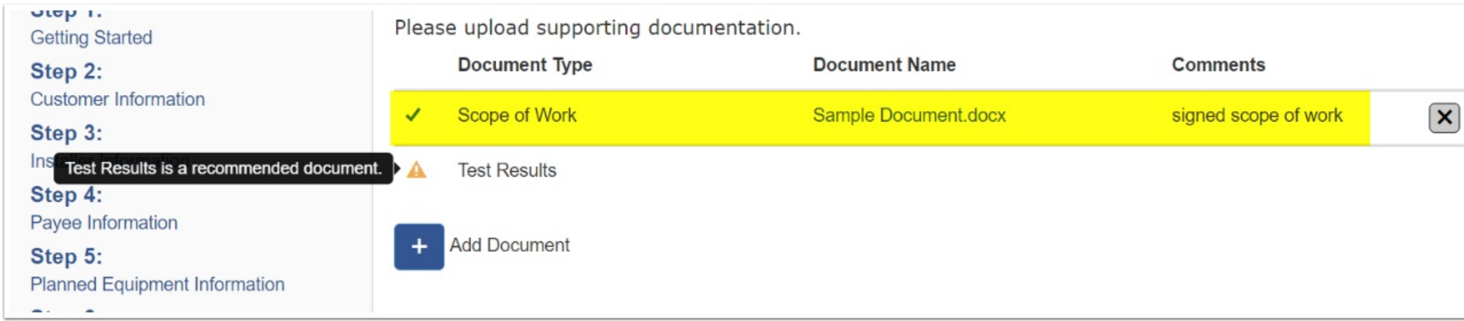
1. ***Choose File***

2. Add File ***Description / Comments*** (optional)
3. ***Upload***



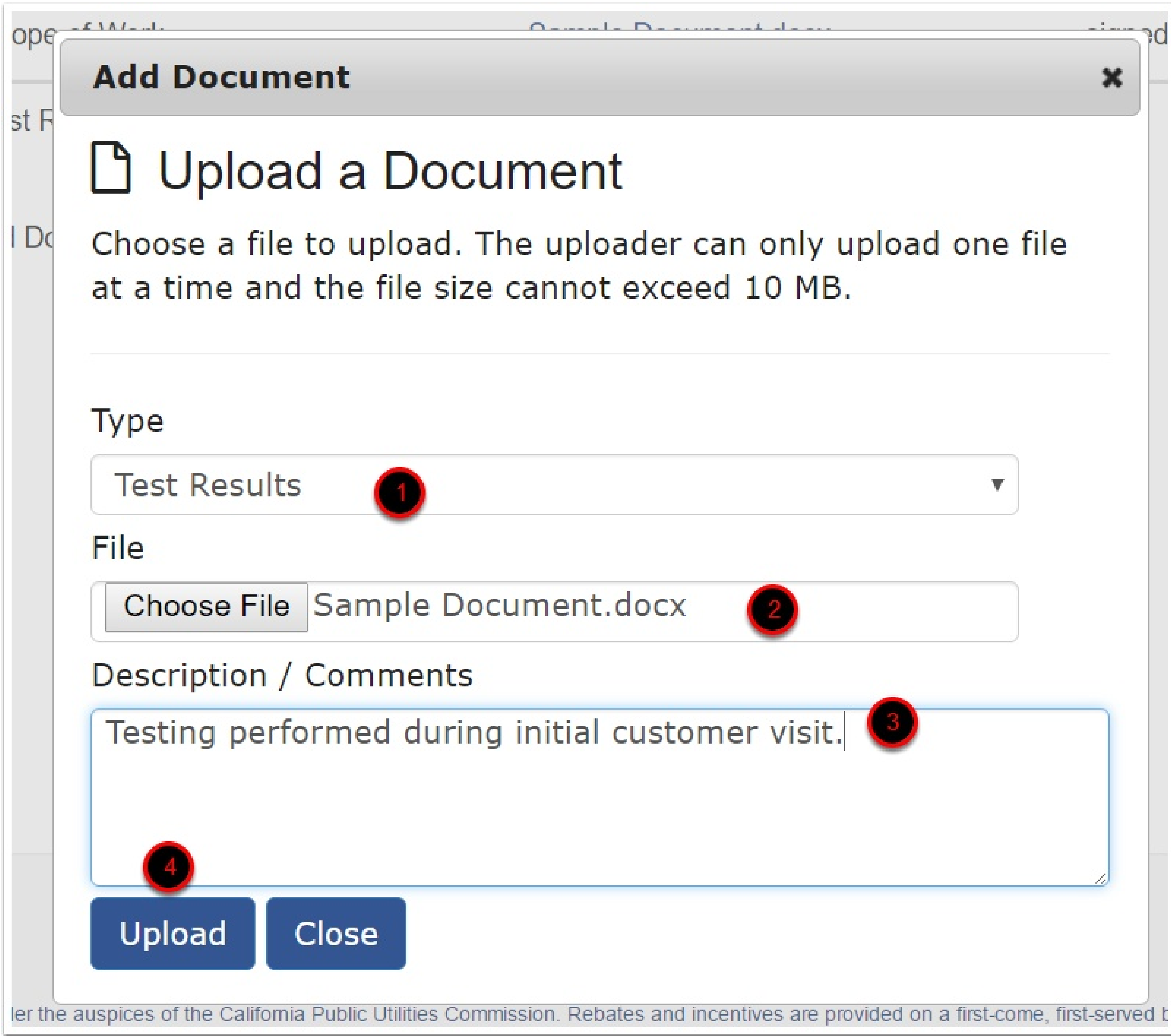
8.3

Scope of Work Uploaded. If Test Results are not available to upload, they may be submitted after reservation is completed.



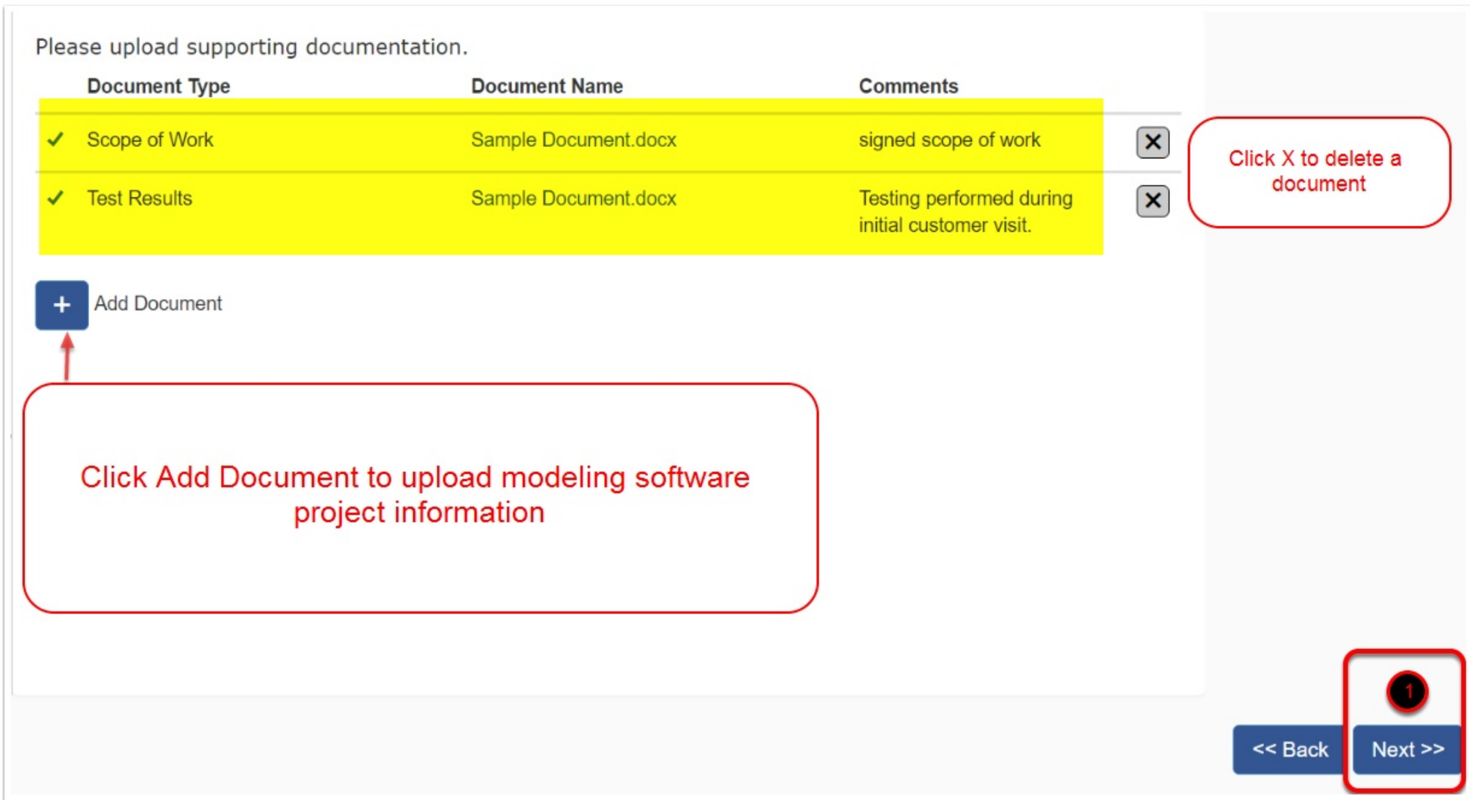
8.4

Repeat steps to upload Test Results Form.



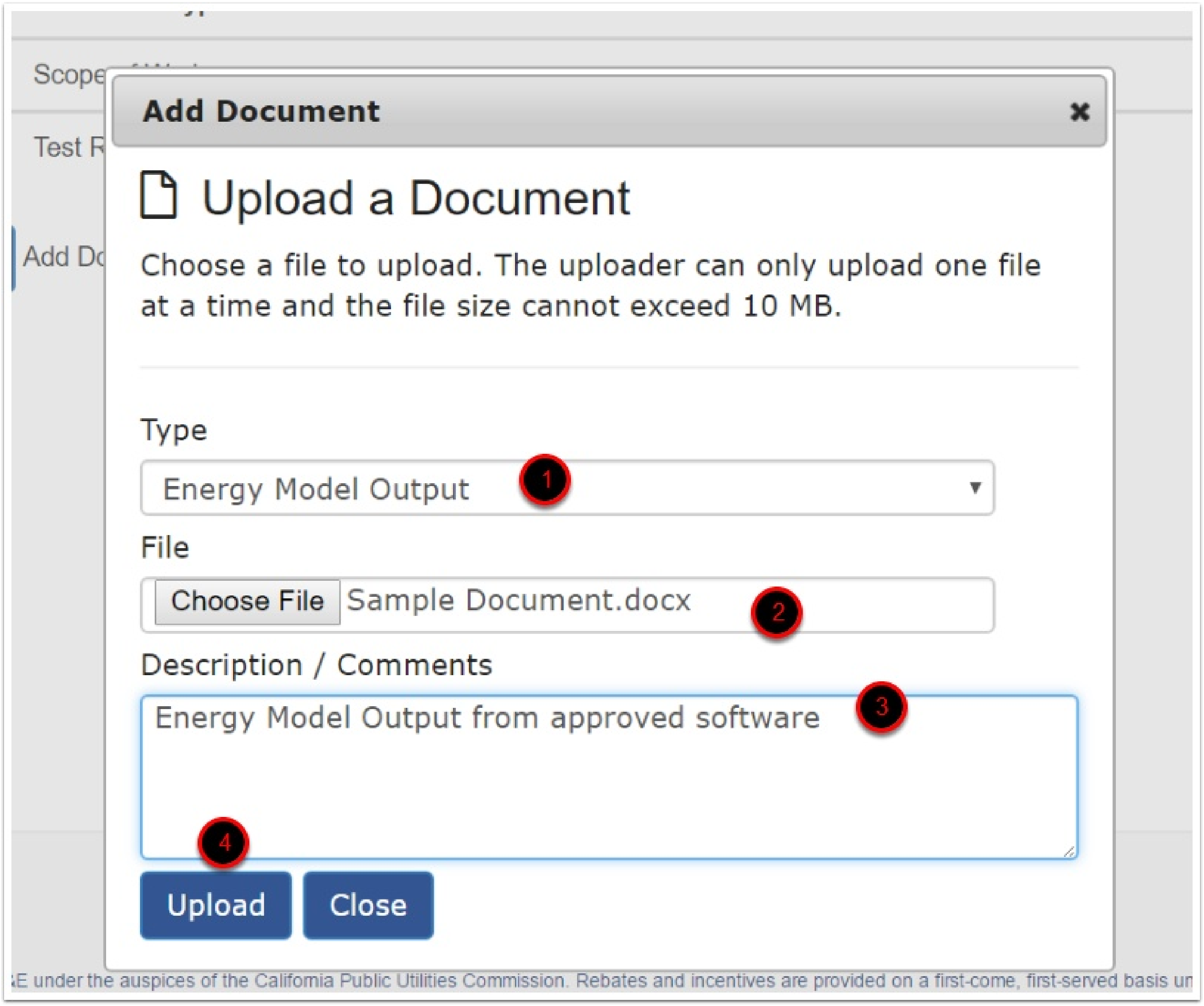
8.5

1. Click ***Next***



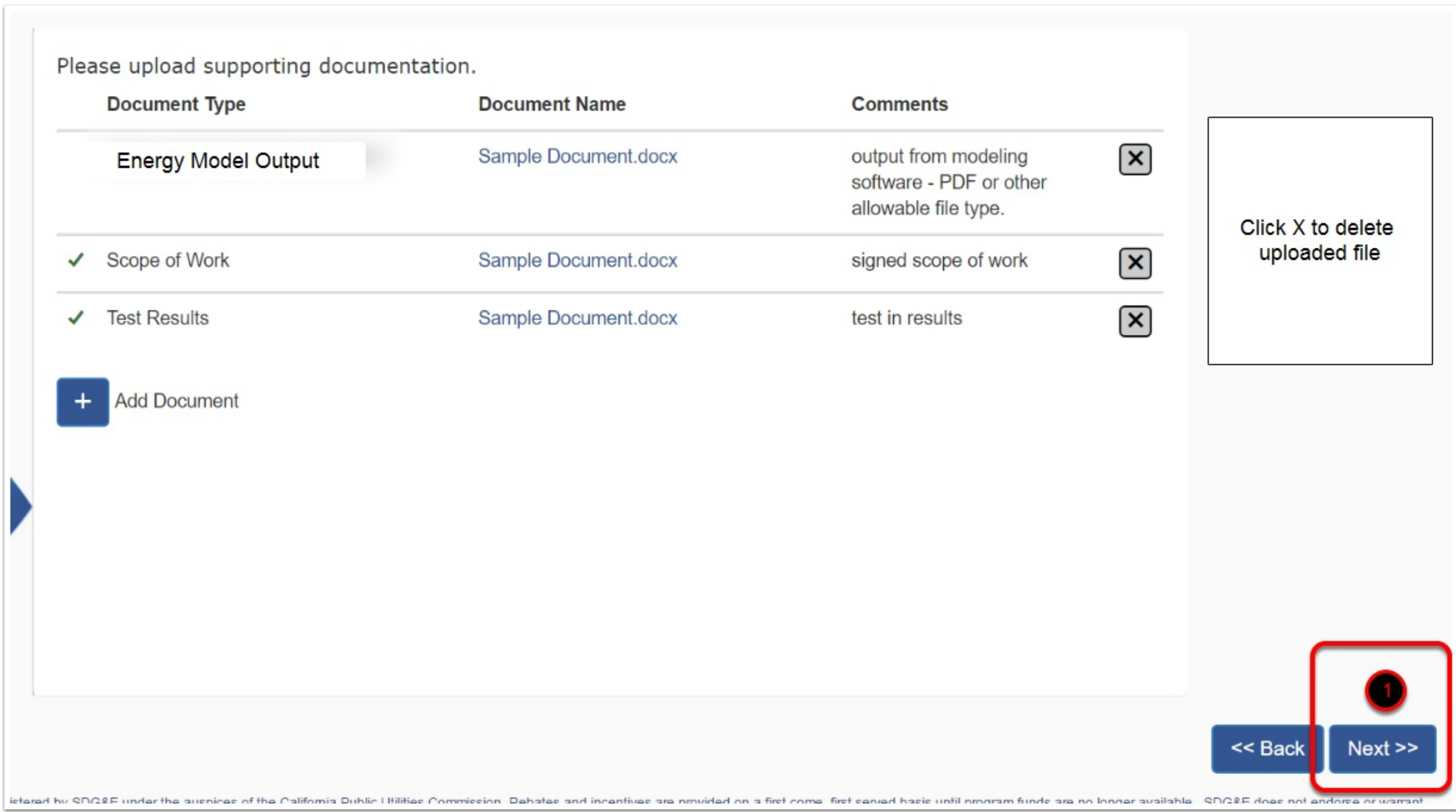
8.6

1. Select File Type - ***Energy Model Output***
2. Choose File from computer (after download from modeling software)
3. Enter Comment (optional)
4. Click ***Upload*** - (*note* - .xml files not currently accepted as upload format)



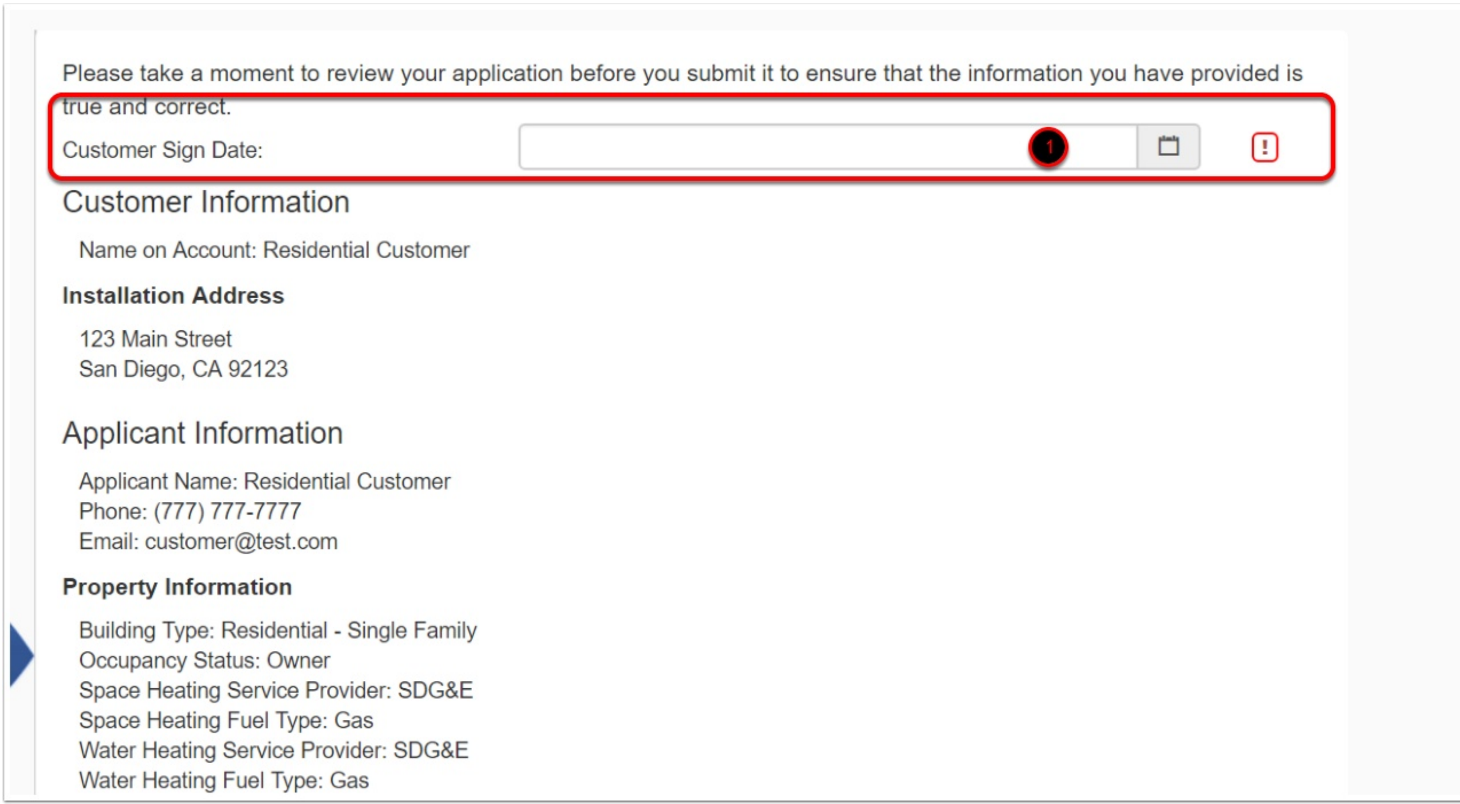
8.7

1. Click ***Next***



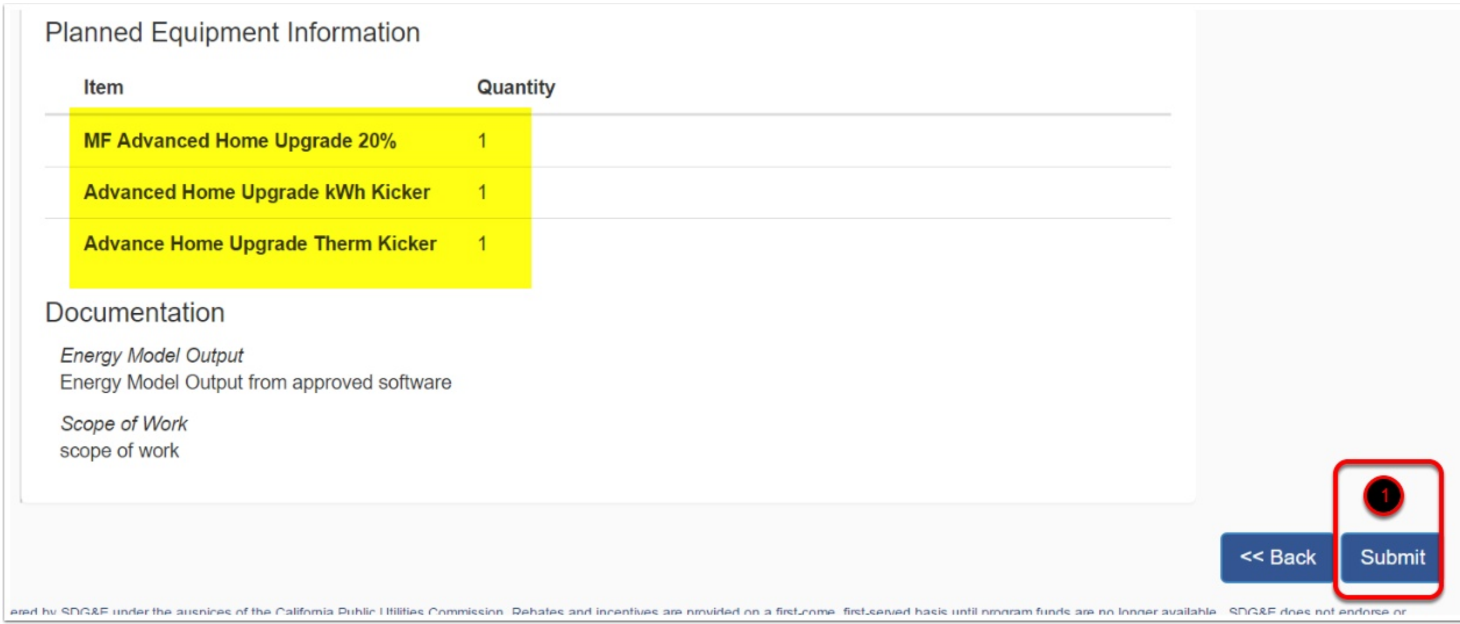
9. Step 9 - Review & Submit

1. Enter date customer signed Scope of Work.

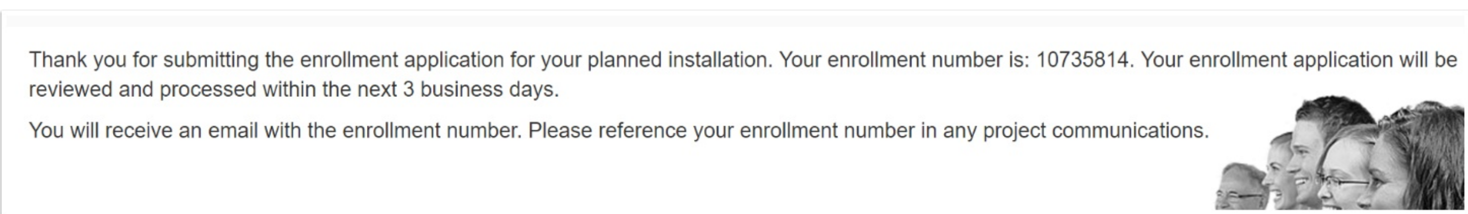


9.1

1. ***Submit*** reservation for planned project.



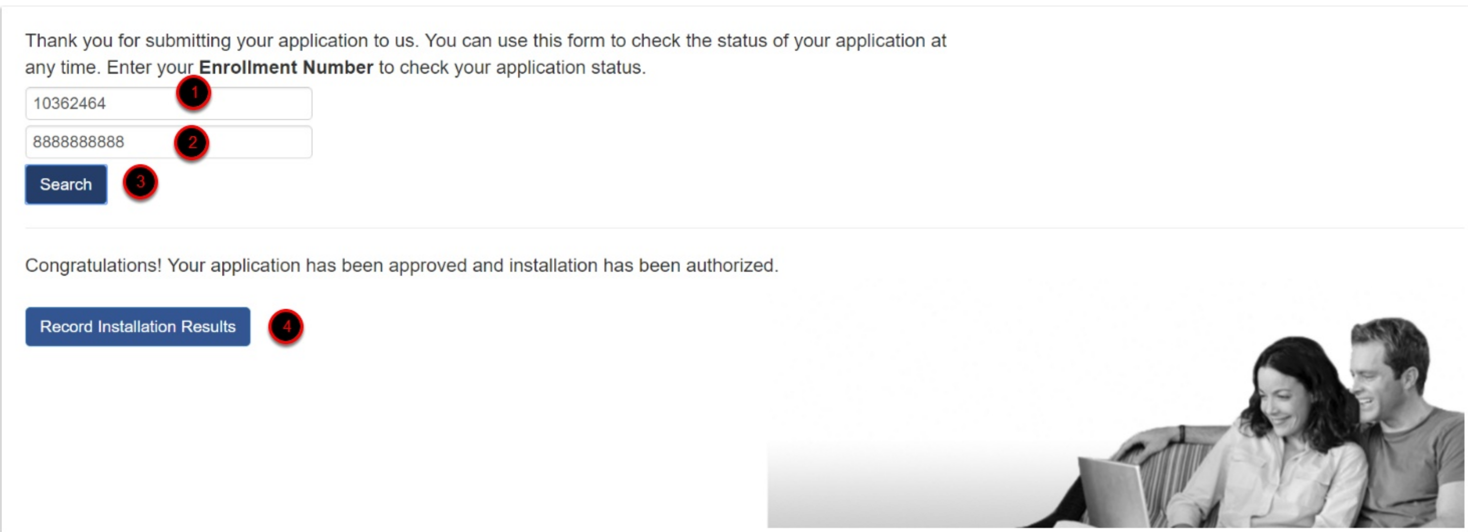
10. Step 9 - Confirmation of Enrollment



11. Status Check

11.1

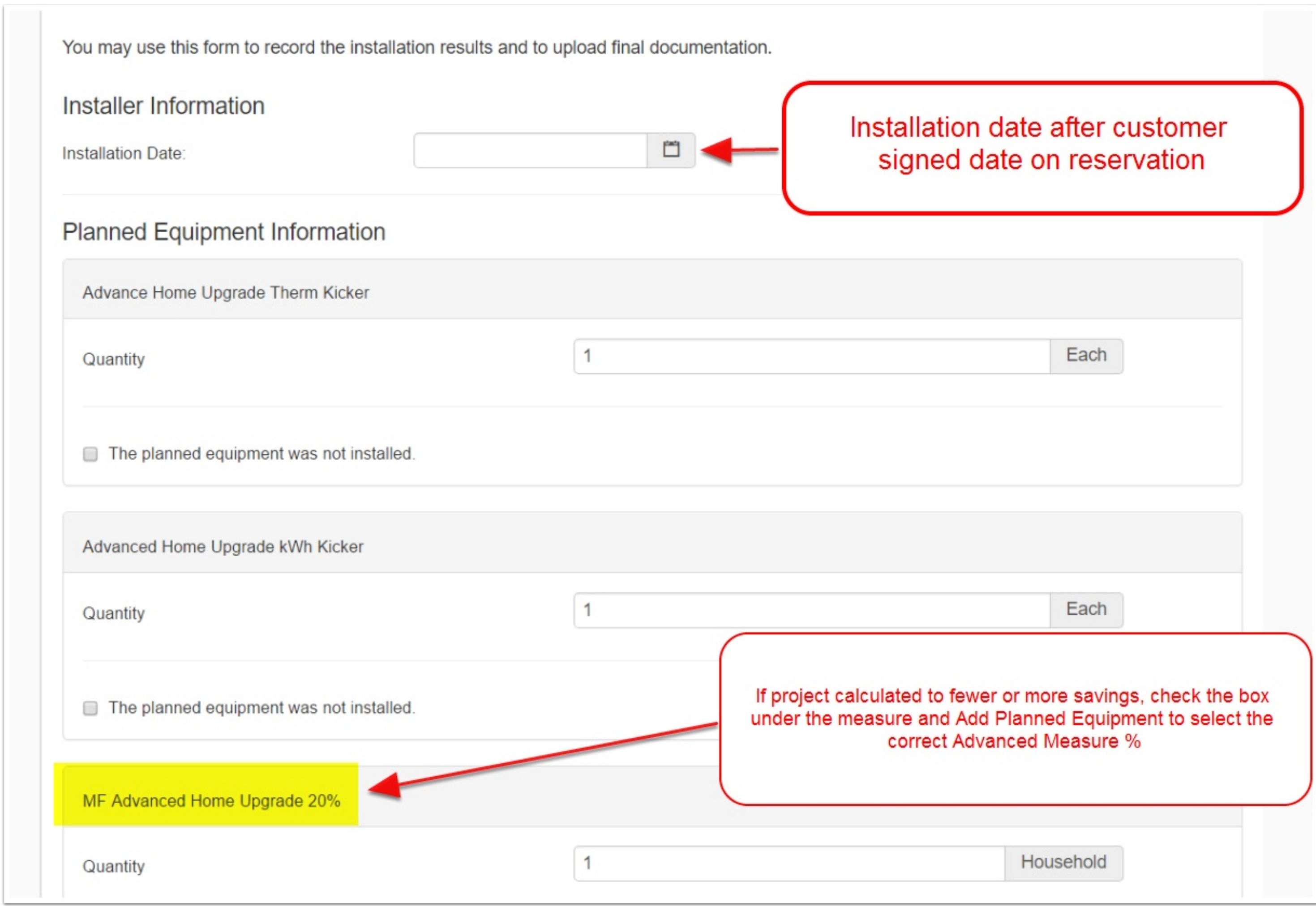
1. Enter ***Enrollment Number***
2. Enter ***Customer SDG&E account number***
3. ***Search***
4. ***Record Installation Results*** if available (contractors will also be notified via email when reservation has been reviewed and installation may begin).



12. Post-Installation - Step 1 - Record Installation Results

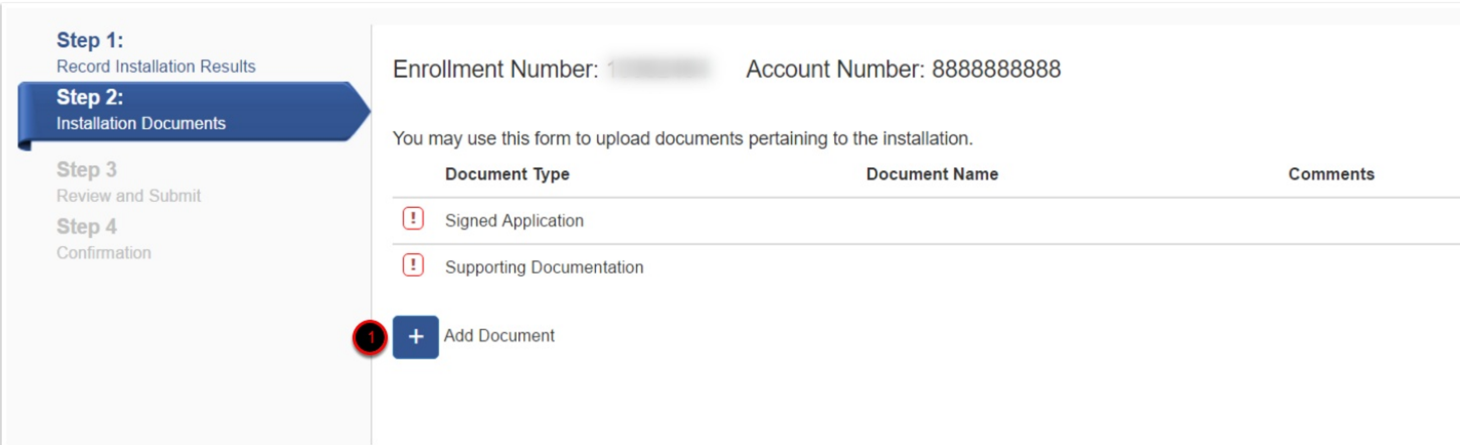
1. Enter ***Installation Date***
2. Enter ***Quantity 1***

The list of planned savings % displays from original reservation - see below if the savings are different than planned.



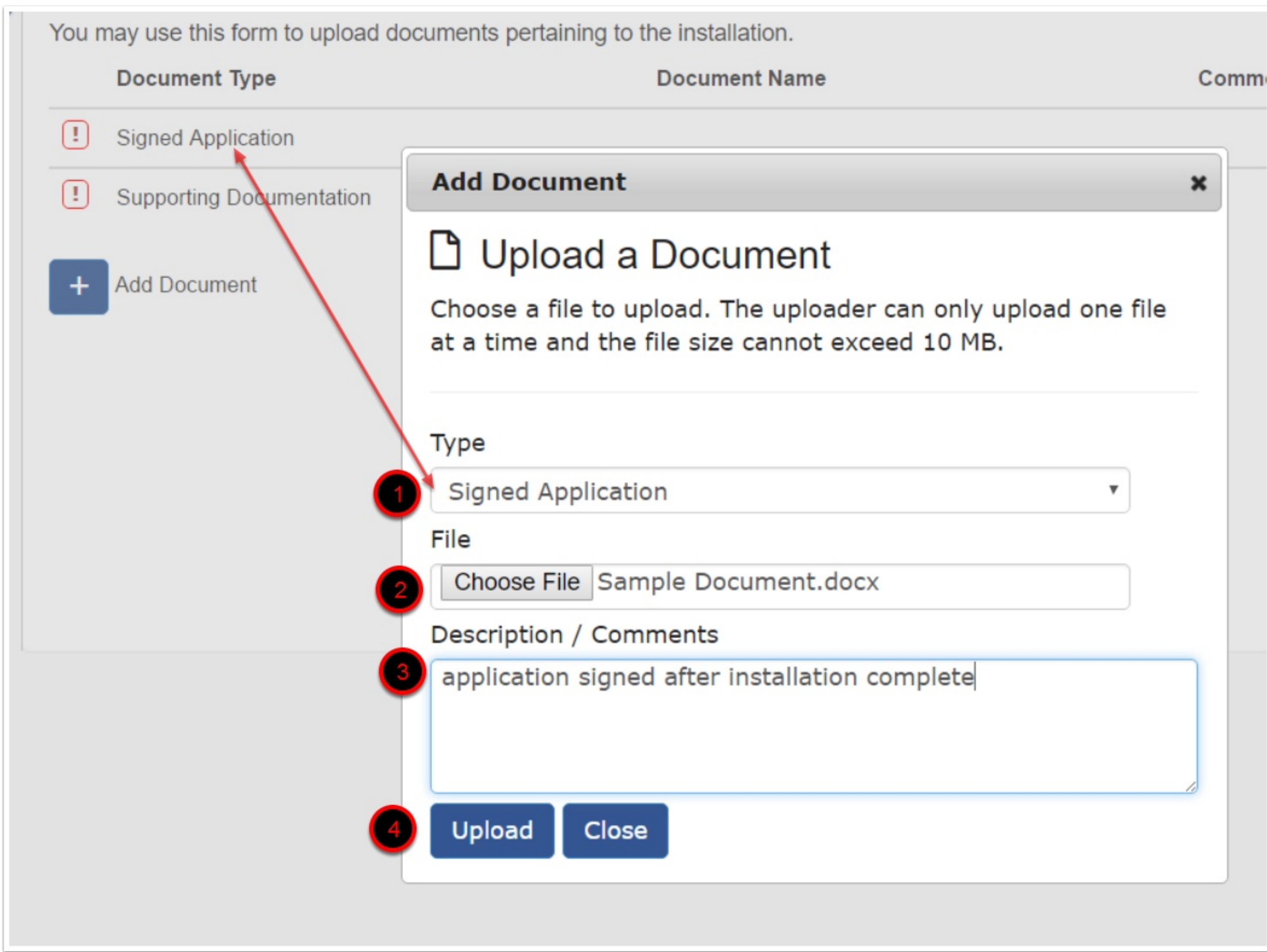
13. Step 2 - Installation Documentation

1. Click ***Add Documents***



13.1

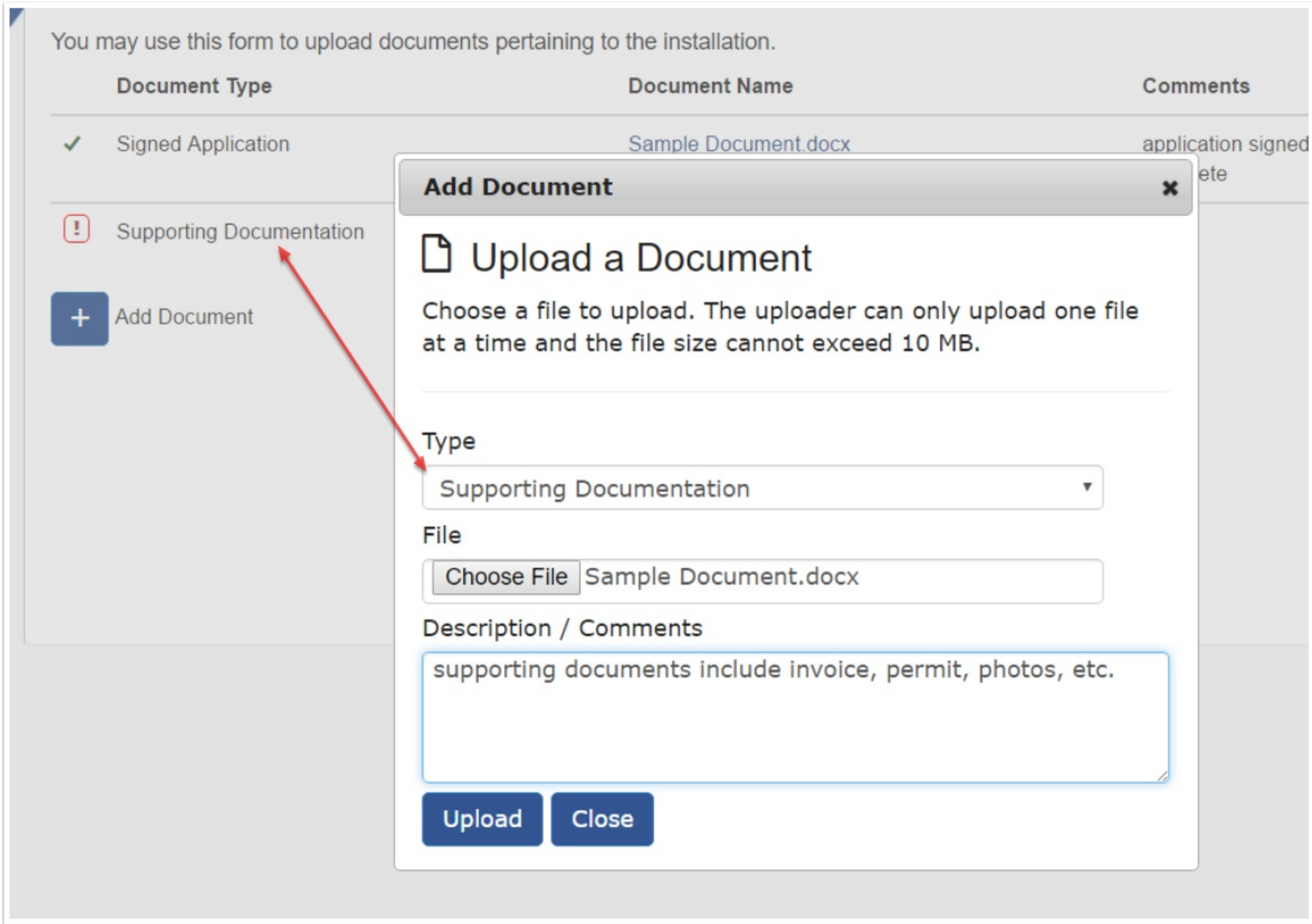
1. Select ***Document Type*** - ***Signed Application***
2. ***Choose File*** from computer
3. ***Add Comments*** **(optional)**
4. ***Upload***



13.2

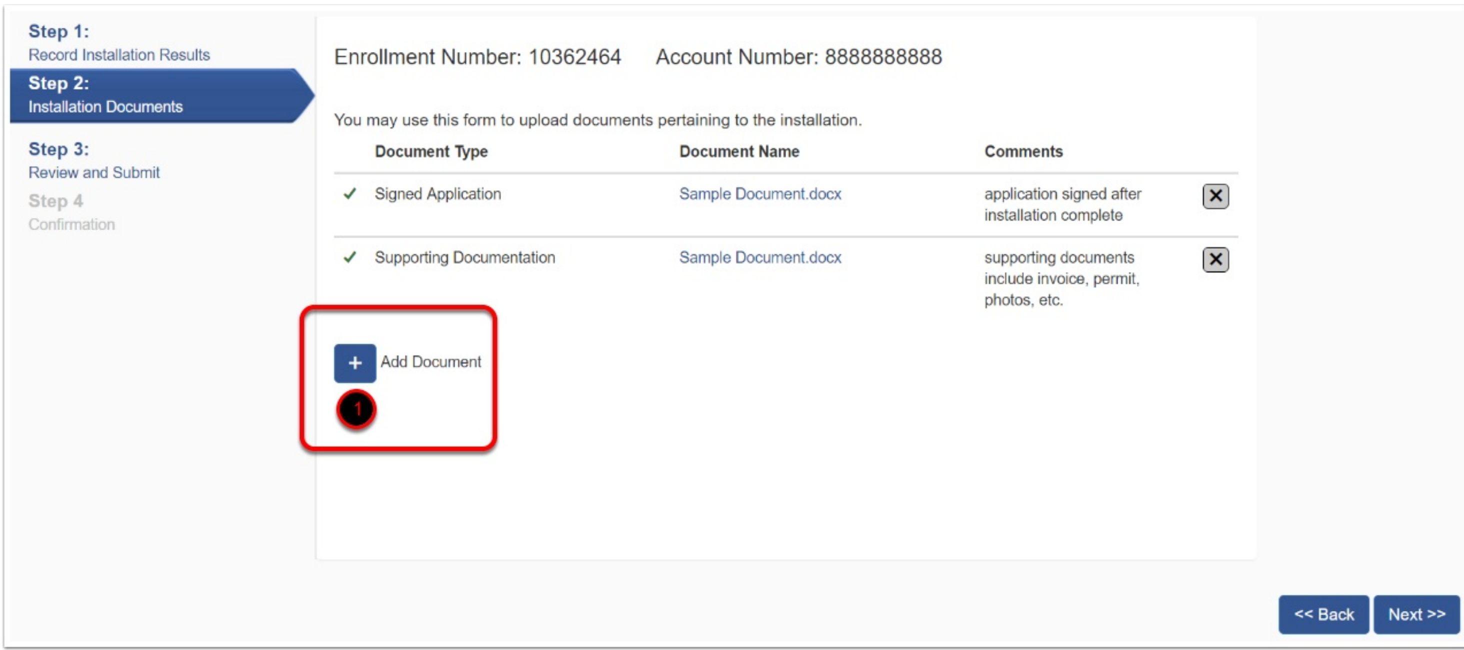
1. Select ***Document Type*** - *Supporting Documentation*
2. ***Choose File*** from computer

3. ***Add Comments*** **(optional)**
4. ***Upload***



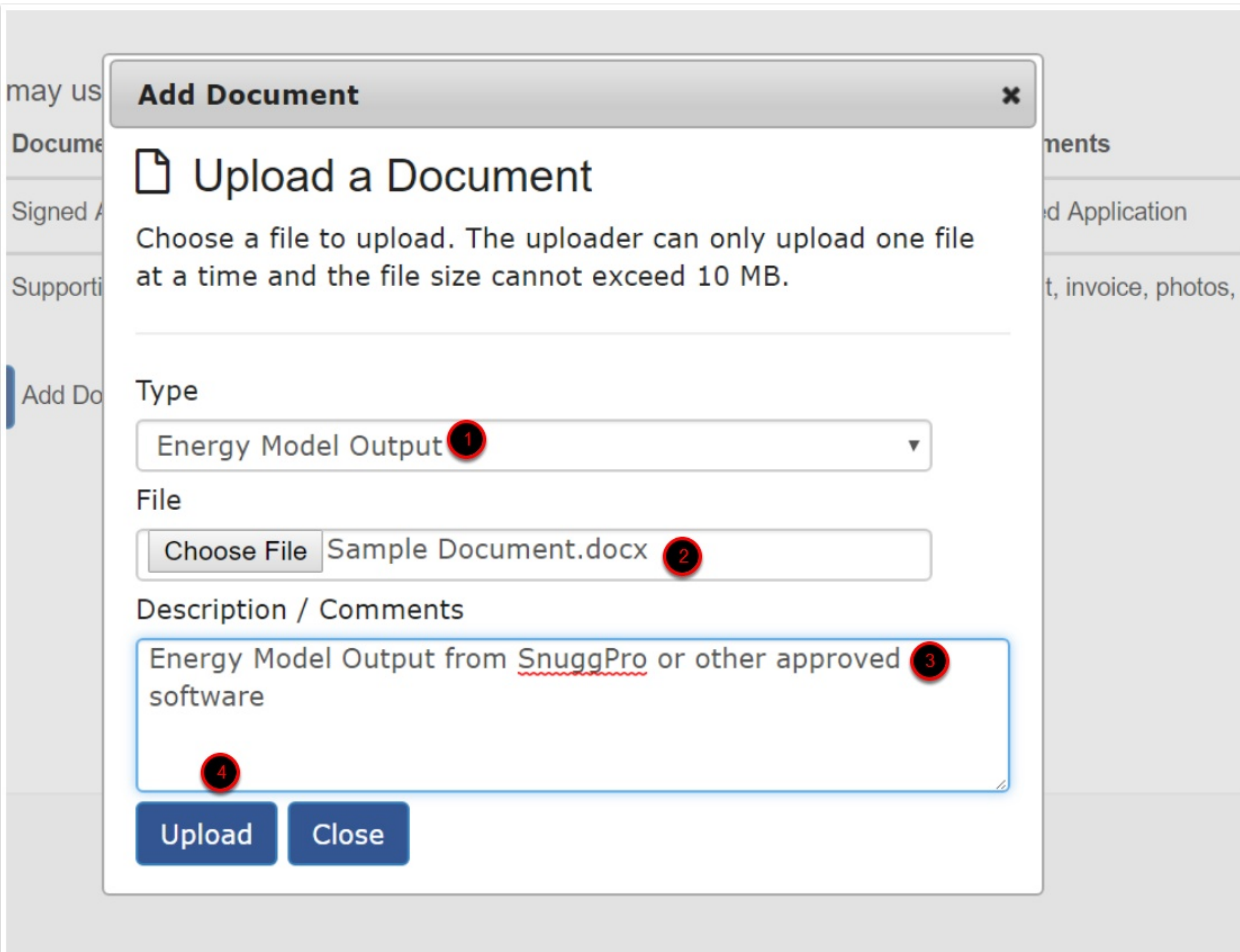
13.3

1. Click ***Add Document*** to upload Advance Project Modeling Software output file.



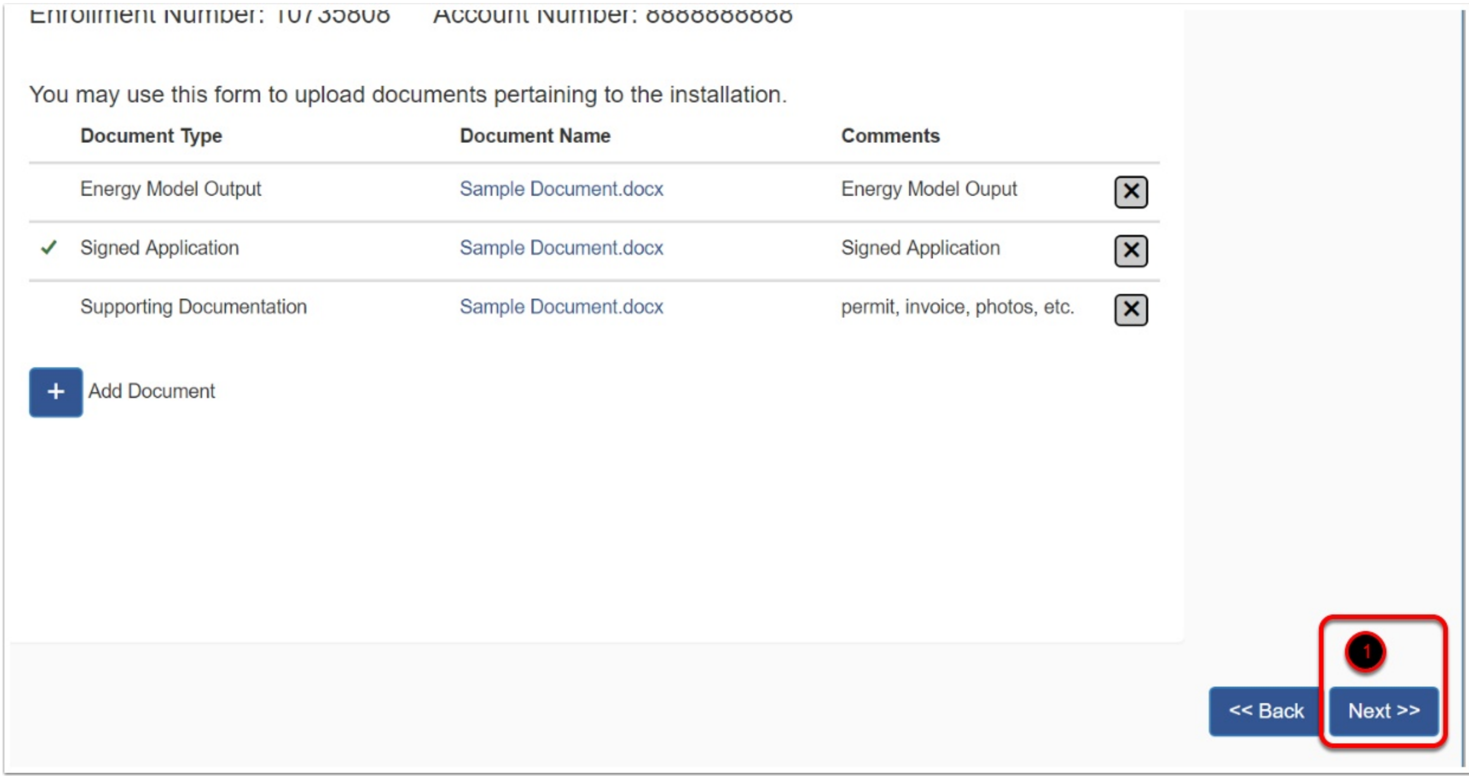
13.4

1. Select File Type - ***Energy Model Output***
2. Choose File from computer (after download from modeling software)
3. Enter Comment (optional)
4. Click ***Upload*** - (*note* - .xml files not currently accepted as upload format)



13.5

1. Click ***Next***



14. Step 3 - Review & Submit

1. Click ***Submit*** to send project information

Enrollment Number: 10735808 Account Number: 0000000000

Please take a moment to review your installation results before you submit it to ensure that the information you have provided is true and correct.

Installer Information

Installation Date: 05/21/2017

Planned Equipment Information

Advanced Home Upgrade 20%

Quantity: 1

Installation Documents

Signed Application: Sample Document.docx

Supporting Documentation: Sample Document.docx

Energy Model Output: Sample Document.docx

1

<< Back Submit

15. Step 4 - Confirmation

Your results have been submitted! Your installation results will be reviewed and processed.

Next steps:

If your project is selected for inspection, we will process according to your original testing type submitted on the original application.

Collaborative Inspection Requests - If you requested a collaborative inspection and your project is selected, you will be contacted for potential dates.

Non-Collaborative Inspection - We will schedule with the customer and perform inspection.

If your project is not selected for inspection, we will contact you for test results (if not uploaded with installation information.)

Once testing is complete and data uploaded, processing will continue to final review and payment.

Click here to return to the Status Check page.

16. Status Check