

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**

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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 **1**

Other

! = 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: | <div style="border: 2px solid red; padding: 5px; text-align: center;">Customer Information and Installation Address displays limited information to validate customer information - no entry needed</div> |
| Alt Phone: | |
| Fax: | |
| Email: | |
| 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 |

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2.1

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

Mailing Address

Is the mailing address the same as the installation address? Yes No **1**

Is this a PO Box? Yes No **2**

Country:

Street:

Unit:

ZIP / Postal Code:

City:

State:

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2.2

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

Property Information

| | | |
|---------------------------------|--|----------------------------------|
| Building Type: | <input type="text" value="Residential - Single Family"/> | <input type="button" value="!"/> |
| Occupancy Status: | <input type="text" value="Owner"/> | <input type="button" value="!"/> |
| Space Heating Service Provider: | <input type="text"/> | <input type="button" value="!"/> |
| Space Heating Fuel Type: | <input type="text"/> | <input type="button" value="!"/> |
| Water Heating Service Provider: | <input type="text"/> | <input type="button" value="!"/> |
| Water Heating Fuel Type: | <input type="text"/> | <input type="button" value="!"/> |
| Total Pre-Rebate Cost: | <input type="text" value="\$"/> | <input type="button" value="!"/> |
| Year Built: | <input type="text"/> | <input type="button" value="!"/> |
| Number of Floors: | <input type="text"/> | <input type="button" value="!"/> |
| Air Conditioned: | <input type="text"/> | <input type="button" value="!"/> |
| Total Sq Ft : | <input type="text"/> | <input type="button" value="!"/> |
| Air Conditioned Square Footage: | <input type="text"/> | <input type="button" value="!"/> |
| Foundation Type: | <input type="text"/> | <input type="button" value="!"/> |
| Number of Bedrooms: | <input type="text"/> | <input type="button" value="!"/> |
| Existing Heating Type: | <input type="text"/> | <input type="button" value="!"/> |
| Years Home Owned: | <input type="text"/> | <input type="button" value="!"/> |

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2.3

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

General Application Information

| | | |
|--------------------------------|--|----------------------------------|
| Project Type: | <input type="text" value="Home Upgrade Advanced"/> | <input type="button" value="!"/> |
| Modeling Software: | <input type="text" value="SNUGGPro"/> | <input type="button" value="!"/> |
| Split Utility Project: | <input type="text"/> | <input type="button" value="!"/> |
| Reason for Project: | <input type="text"/> | <input type="button" value="!"/> |
| Financing: | <input type="text"/> | <input type="button" value="!"/> |
| Incentive Influence Decision?: | <input type="text"/> | <input type="button" value="!"/> |
| Scheduled Installation Date: | <input type="text"/> | <input type="button" value="!"/> |
| Testing Type: | <input type="text"/> | <input type="button" value="!"/> |

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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**

Please tell us who will be performing the installation.

Clear

Company: con 1 !

Website:

Mailing Address

Is this a PO Box? Yes No

In Care of / Recipient:

Street:

Unit:

ZIP / Postal Code:

City:

State:

Contractor information will populate based on Contractor entered here

2


<< Back Next >>

The screenshot shows a web form for entering contractor information. The 'Company' field contains 'con' and is highlighted with a red circle containing the number '1'. A red arrow points from this field to a red-bordered box containing the text 'Contractor information will populate based on Contractor entered here'. The 'Next >>' button is highlighted with a red circle containing the number '2'. A 'Clear' button is located above the 'Company' field. The form includes fields for Website, Mailing Address, Is this a PO Box?, In Care of / Recipient, Street, Unit, ZIP / Postal Code, City, and State. A blue arrow on the left side of the form indicates the current step.

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**

Please indicate who should receive the payment any qualifying rebates.

Who should receive the payment? Applicant Installer 

Name: Contractor

Phone:

Mailing Address

In Care of / Recipient:


Street: 555 Main Street

Unit:

ZIP / Postal Code: 92123

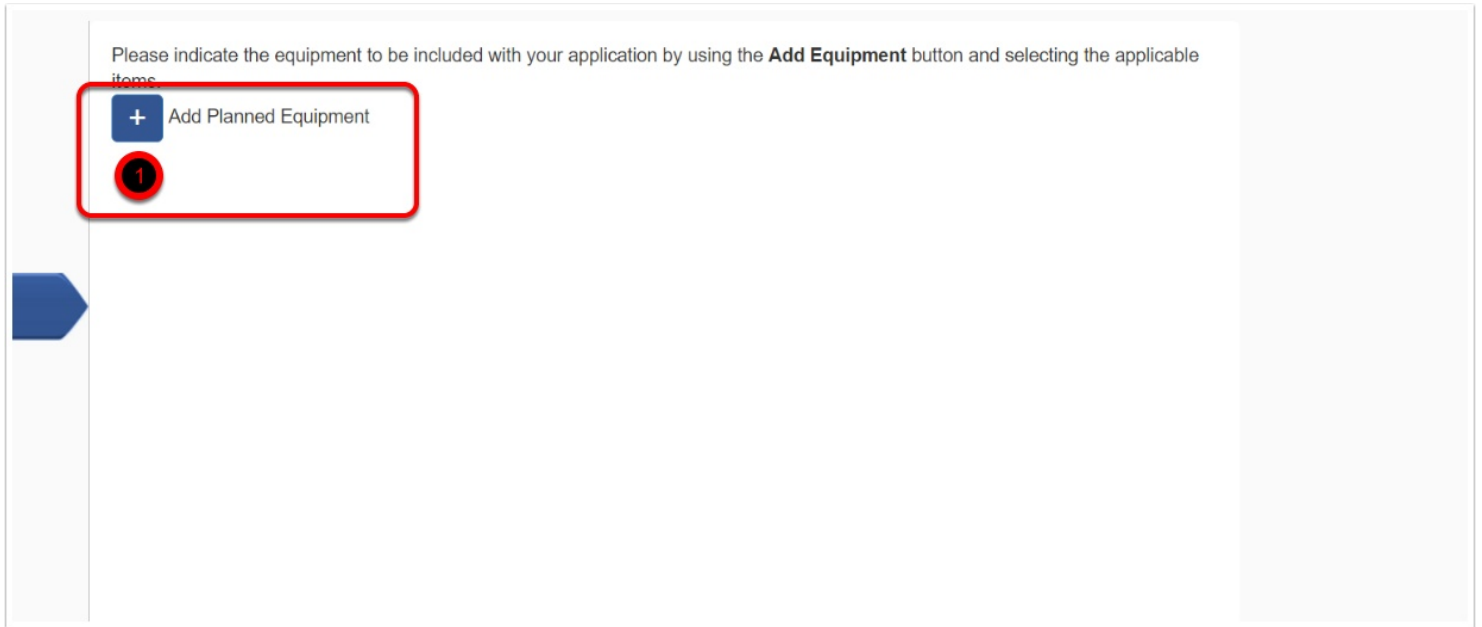
City: San Diego

State: CA

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5. Step 5 - Planned Equipment

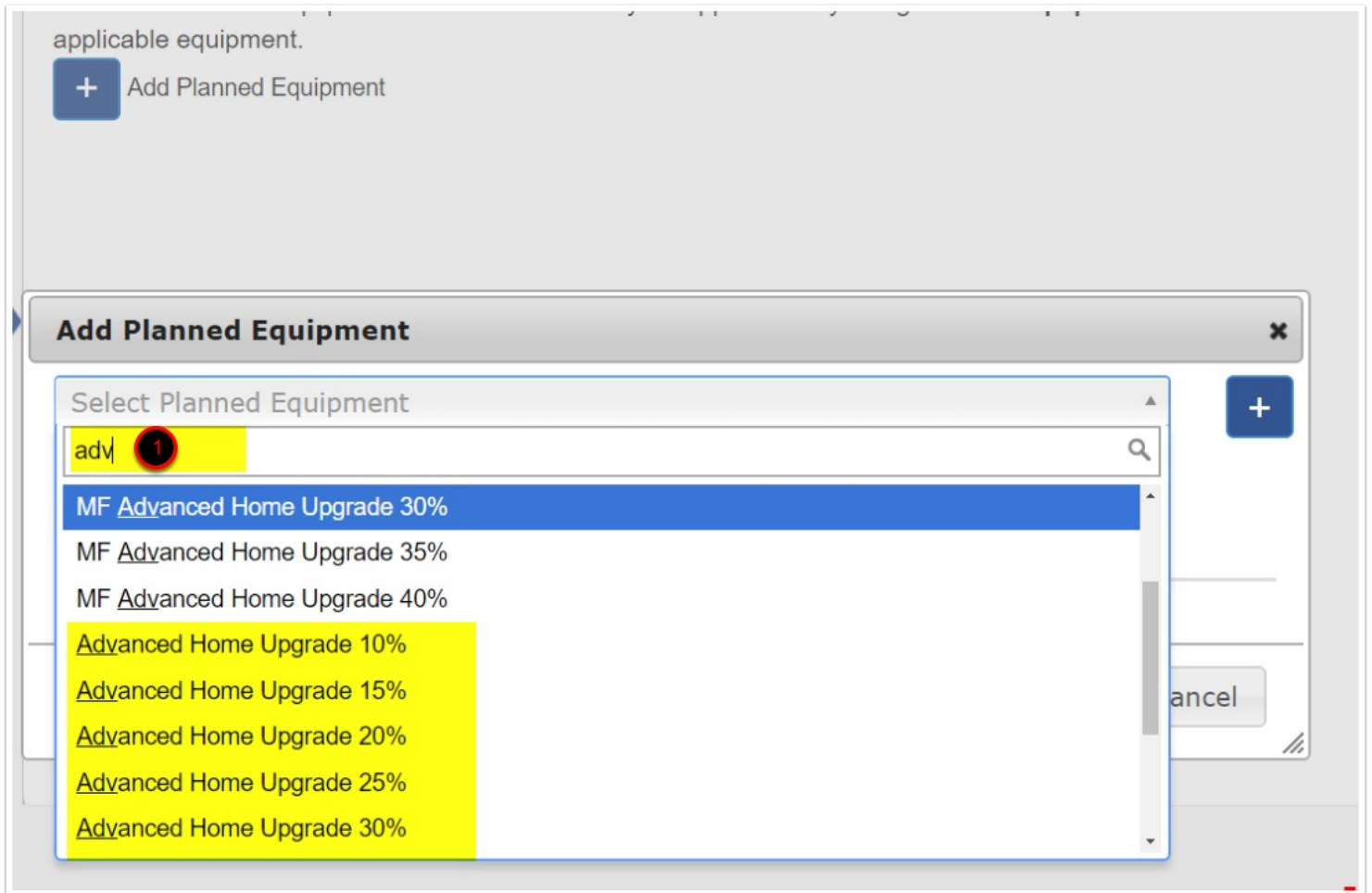
1. Click **Add Planned Equipment**



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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.



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5.2

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

Add Planned Equipment [x]

Advanced Home Upgrade 20% [x] [v]

No. to Add **Equipment Name**

Ok Cancel

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5.3

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

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

Add Planned Equipment

Advanced Home Upgrade 20%

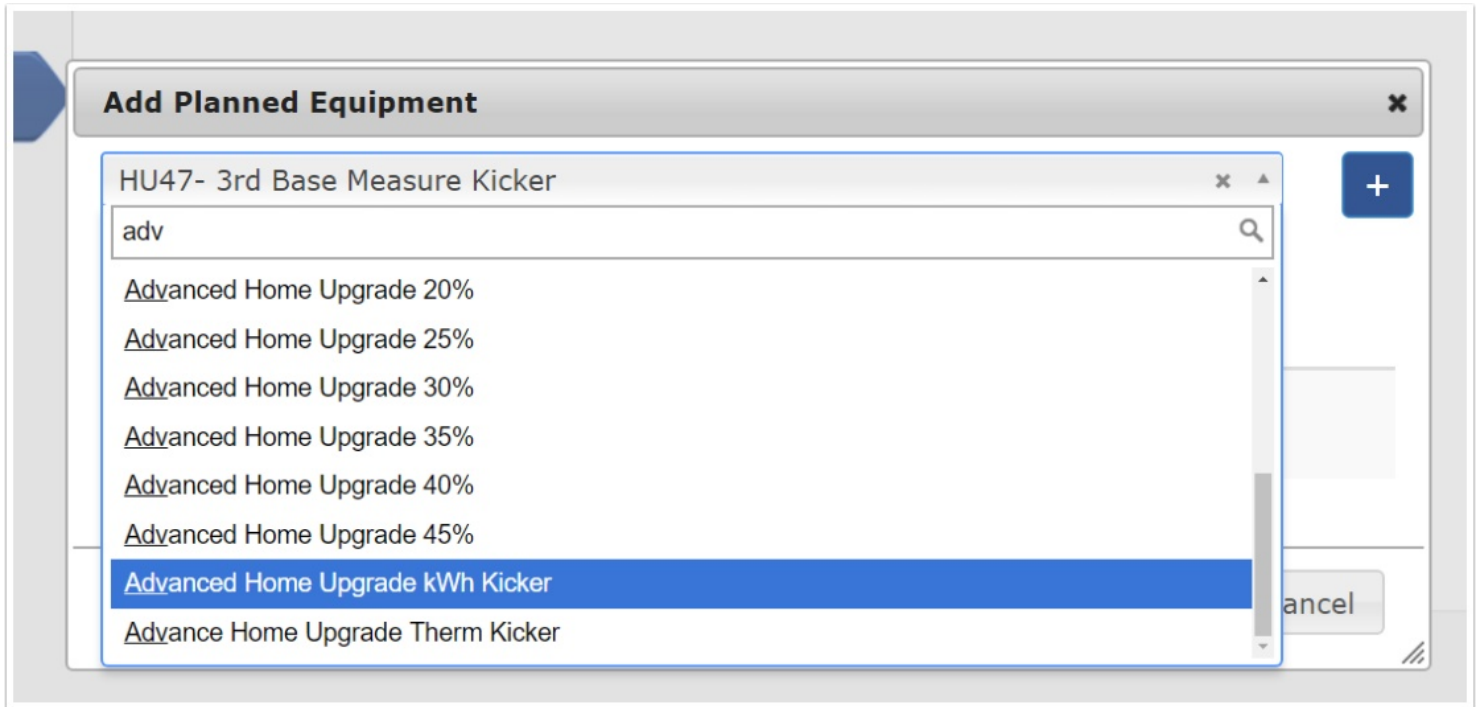
| No. to Add | Equipment Name |
|---------------------------------------|---------------------------|
| <input checked="" type="checkbox"/> 1 | Advanced Home Upgrade 20% |

*Pre-model output required - please upload prior to submitting

Ok Cancel

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5.4



5.5

Add Planned Equipment [Close]

Advance Home Upgrade Therm Kicker [Close] [Dropdown] [Add]

| No. to Add | Equipment Name |
|------------|-----------------------------------|
| [X] 1 | MF Advanced Home Upgrade 20% |
| [X] 1 | Advanced Home Upgrade kWh Kicker |
| [X] 1 | Advance Home Upgrade Therm Kicker |

[Ok] [Cancel]

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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% | <input type="text" value="1"/> | Household | <input type="button" value="X"/> |
| Advanced Home Upgrade kWh Kicker | <input type="text" value="1"/> | Each | <input type="button" value="X"/> |
| Advance Home Upgrade Therm Kicker | <input type="text" value="1"/> | Each | <input type="button" value="X"/> |

Add Planned Equipment Do not add specific equipment for advanced project

6. Step 6 - Planned Project Summary

1. Click **Next** to continue

Planned Project Information listed below:

- Home Upgrade Projects should have planned equipment listed
- Advanced Projects should have a single measure of the planned savings percentage (for example 20%)

| Equipment Information | |
|-----------------------------------|----------|
| Item | Quantity |
| MF Advanced Home Upgrade 20% | 1 |
| Advanced Home Upgrade kWh Kicker | 1 |
| Advance Home Upgrade Therm Kicker | 1 |

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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*.

Please take a moment to help us understand how the applicant learned about the Home Upgrade program so that we may continue to provide the best service possible helping our customers save energy and money.

Lead Source Category: 1

Lead Source: 2

3



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8. Step 8 - Documentation

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

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

Please upload supporting documentation.

| Document Type | Document Name | Comments |
|---|--|----------|
|  Scope of Work | Scope of Work is required to submit | |
|  Test Results | Pre-Installation Test Results Form may be uploaded here | |

  Add Document

8.1

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

Add Document [X]

Upload a Document

Choose a file to upload. The uploader can only upload one file at a time and the file size cannot exceed 10 MB.

Type

Select a document type. [!]

Select a document type. [!]

Advanced Project Document

1 Scope of Work

Test Results

Description / Comments

[Upload] [Close]

8.2

1. **Choose File**

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

Add Document [X]

Upload a Document

Choose a file to upload. The uploader can only upload one file at a time and the file size cannot exceed 10 MB.

Type

Scope of Work

File

Choose File Sample Document.docx 1

Description / Comments

signed| scope of work 2

3

Upload Close

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8.3

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

Step 1: Getting Started

Step 2: Customer Information

Step 3: Insurance Information

Step 4: Payee Information

Step 5: Planned Equipment Information

Please upload supporting documentation.

| Document Type | Document Name | Comments |
|-----------------|----------------------|----------------------|
| ✓ Scope of Work | Sample Document.docx | signed scope of work |
| ⚠ Test Results | | |

+ Add Document

Test Results is a recommended document.

8.4

Repeat steps to upload Test Results Form.

Add Document [Close]

Upload a Document

Choose a file to upload. The uploader can only upload one file at a time and the file size cannot exceed 10 MB.

Type

Test Results 1

File

Choose File Sample Document.docx 2

Description / Comments

Testing performed during initial customer visit. 3

4 Upload Close

ler the auspices of the California Public Utilities Commission. Rebates and incentives are provided on a first-come, first-served t

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8.5

1. Click **Next**

Please upload supporting documentation.

| Document Type | Document Name | Comments | |
|-----------------|----------------------|--|--------------------------|
| ✓ Scope of Work | Sample Document.docx | signed scope of work | <input type="checkbox"/> |
| ✓ Test Results | Sample Document.docx | Testing performed during initial customer visit. | <input type="checkbox"/> |

Click Add Document to upload modeling software project information

Click X to delete a document

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)

Add Document

Upload a Document

Choose a file to upload. The uploader can only upload one file at a time and the file size cannot exceed 10 MB.

Type

Energy Model Output

File

Choose File Sample Document.docx

Description / Comments

Energy Model Output from approved software

Upload Close

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8.7

1. Click **Next**

Please upload supporting documentation.

| Document Type | Document Name | Comments | |
|---------------------|----------------------|---|--------------------------|
| Energy Model Output | Sample Document.docx | output from modeling software - PDF or other allowable file type. | <input type="checkbox"/> |
| ✓ Scope of Work | Sample Document.docx | signed scope of work | <input type="checkbox"/> |
| ✓ Test Results | Sample Document.docx | test in results | <input type="checkbox"/> |

Add Document



Click X to delete uploaded file

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9. Step 9 - Review & Submit

1. Enter date customer signed Scope of Work.

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

Customer Sign Date:  

Customer Information

Name on Account: Residential Customer

Installation Address

123 Main Street
San Diego, CA 92123

Applicant Information

Applicant Name: Residential Customer
Phone: (777) 777-7777
Email: customer@test.com

Property Information

Building Type: Residential - Single Family
Occupancy Status: Owner
Space Heating Service Provider: SDG&E
Space Heating Fuel Type: Gas
Water Heating Service Provider: SDG&E
Water Heating Fuel Type: Gas

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9.1

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

Planned Equipment Information

| Item | Quantity |
|-----------------------------------|----------|
| MF Advanced Home Upgrade 20% | 1 |
| Advanced Home Upgrade kWh Kicker | 1 |
| Advance Home Upgrade Therm Kicker | 1 |

Documentation

Energy Model Output
Energy Model Output from approved software

Scope of Work
scope of work

<< Back **Submit**

ered 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 enforce or

10. Step 9 - Confirmation of Enrollment

Thank you for submitting the enrollment application for your planned installation. Your enrollment number is: 10735814. Your enrollment application will be reviewed and processed within the next 3 business days.

You will receive an email with the enrollment number. Please reference your enrollment number in any project communications.



11. Status Check

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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).

Thank you for submitting your application to us. You can use this form to check the status of your application at any time. Enter your **Enrollment Number** to check your application status.

10362464 **1**

8888888888 **2**

Search **3**

Congratulations! Your application has been approved and installation has been authorized.

Record Installation Results **4**



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.

You may use this form to record the installation results and to upload final documentation.

Installer Information

Installation Date:

Planned Equipment Information

Advance Home Upgrade Therm Kicker

Quantity Each

The planned equipment was not installed.

Advanced Home Upgrade kWh Kicker

Quantity Each

The planned equipment was not installed.

MF Advanced Home Upgrade 20%

Quantity Household

Installation date after customer signed date on reservation

If project calculated to fewer or more savings, check the box under the measure and Add Planned Equipment to select the correct Advanced Measure %

13. Step 2 - Installation Documentation

1. Click **Add Documents**

Step 1:
Record Installation Results

Step 2:
Installation Documents

Step 3:
Review and Submit

Step 4:
Confirmation

Enrollment Number: 1 [REDACTED] Account Number: 8888888888

You may use this form to upload documents pertaining to the installation.

| Document Type | Document Name | Comments |
|------------------------------|---------------|----------|
| [!] Signed Application | | |
| [!] Supporting Documentation | | |

[!] + Add Document

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13.1

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

You may use this form to upload documents pertaining to the installation.

| Document Type | Document Name | Comm |
|----------------------------|---------------|------|
| ! Signed Application | | |
| ! Supporting Documentation | | |

+ Add Document

Add Document

Upload a Document

Choose a file to upload. The uploader can only upload one file at a time and the file size cannot exceed 10 MB.

Type

1 Signed Application

File

2 Choose File Sample Document.docx

Description / Comments

3 application signed after installation complete

4 Upload Close

13.2

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

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

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

You may use this form to upload documents pertaining to the installation.

| Document Type | Document Name | Comments |
|----------------------------|----------------------|---------------------------|
| ✓ Signed Application | Sample Document.docx | application signed ete |
| ! Supporting Documentation | | |

+ Add Document

Add Document

Upload a Document

Choose a file to upload. The uploader can only upload one file at a time and the file size cannot exceed 10 MB.

Type
Supporting Documentation

File
Choose File Sample Document.docx

Description / Comments
supporting documents include invoice, permit, photos, etc.

Upload Close

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13.3

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

Step 1:
Record Installation Results

Step 2:
Installation Documents

Step 3:
Review and Submit

Step 4:
Confirmation

Enrollment Number: 10362464 Account Number: 8888888888

You may use this form to upload documents pertaining to the installation.

| Document Type | Document Name | Comments | |
|----------------------------|----------------------|--|---|
| ✓ Signed Application | Sample Document.docx | application signed after installation complete | X |
| ✓ Supporting Documentation | Sample Document.docx | supporting documents include invoice, permit, photos, etc. | X |

+ Add Document

1

<< Back Next >>

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)

may use
Documents
Signed Application
Supporting Documents
t, invoice, photos,

Add Document

Upload a Document

Choose a file to upload. The uploader can only upload one file at a time and the file size cannot exceed 10 MB.

Type

Energy Model Output

File

Choose File Sample Document.docx

Description / Comments

Energy Model Output from SnuggPro or other approved software

Upload Close

16. Status Check

Thank you for submitting your application to us. You can use this form to check the status of your application at any time. Enter your **Enrollment Number** to check your application status.

1

2

3

Your installation information has been received and processed.

Next steps:

1. You may be contacted if your project is selected for post-installation verification.
2. Once testing data has been received (if not supplied), processing will continue to final