



Advanced Home Upgrade Application Document Checklist

These forms are required to upload to our Advanced Home Upgrade portal for Quality Assurance (QA) Desktop Review. All the Documents italicized below can be found in the Document Library on the Program Portal Homeupgrade.org.

Table 1: Checklist for Advanced Home Upgrade Applications

Documents	Document Intended Purpose	Required	Forms and Additional Resources
<input type="checkbox"/> Test Measurements Form	Provide important results of Whole House and Combustion Appliance Safety tests	X	<ul style="list-style-type: none"> <i>Test Measurement Form or 2-4 Unit Test Measurement Form</i>
<input type="checkbox"/> Scope of Work/Signed	Demonstrate upgrade work performed on home	X	
<input type="checkbox"/> Final Building Permit	Closed/Finalized building permit (if heat pump or AC measures have been installed); copy of open or closed building permit for any Scope of Work that required one.	Required if AC/Heat Pump upgraded	
<input type="checkbox"/> Safety Quality Acknowledgement Form (SQA)	Used to ensure that homeowners are aware of CAS testing performed on their home.	X	<ul style="list-style-type: none"> <i>SQA form</i>
<input type="checkbox"/> Additional documentation, including pictures	Used to verify equipment specification sheets. Lighting, insulation, HVAC, water heater. HPHI – Ultimate Comfort HES – if applicable	Required if applicable	
<input type="checkbox"/> Rebate Authorization Form	Provides the option for PG&E customers to assign the check to the Participating Contractor who performed the upgrade work. Build It Green also needs to have the contractor’s W-9 form on file.	Required if the rebate is reassigned	<ul style="list-style-type: none"> <i>W-9 form</i> <i>Rebate Assignment Form</i>

***A signed contract is required for ALL jobs when submitting the Full Application (test-out documentation)**

Build It Green Implements Advanced Home Upgrade in the Pacific Gas & Electric Company service territory. Contact BIG at desktopqareview@builditgreen.org or call (510) 285-6222