



Advanced Home Upgrade

Energy Upgrade California®

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"/> Modeling Software	Demonstrate a modeled savings for rebate determination	X	<ul style="list-style-type: none"> HPXML Software Comparison
<input type="checkbox"/> Modeling Software HPXML	Populate upgrade measure inputs in the Portal (.opt, .pdf, etc)	X	
<input type="checkbox"/> Scope of Work/ Signed Contract*	Demonstrate upgrade work performed on home.	X	
<input type="checkbox"/> Building Permit	Validates jurisdictional requirements for relevant scope of work measures.	Required if applicable	
<input type="checkbox"/> CF-4R	Used to determine eligibility of HERS verifications <ul style="list-style-type: none"> System Airflow Refrigerant Charge Fan Watt Flow 	X	
<input type="checkbox"/> Additional documentation including pictures	Used to verify and approve savings for extreme conditions like building leakage > 30% or anomalies like missing HVAC units.	Required if applicable	
<input type="checkbox"/> Safety and Quality Acknowledgement (SQA) form	Used to ensure that homeowners are aware of CAS testing performed on their home by participating contractor	X	<ul style="list-style-type: none"> <i>SQA Form</i>
<input type="checkbox"/> Customer Incentive Payment Assignment 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 a W-9 form on file.	Required if 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 Energy Upgrade California® Home Upgrade in the Pacific Gas & Electric Company service territory. Contact BIG at info@homeupgrade.org or call (510) 285-6222