



Home Upgrade

Energy Upgrade California®


**Southern California Edison (SCE) and SoCalGas®
Energy Upgrade California® Home Upgrade**

*Home Upgrade Incentive Calculator
User Guide v1.0*

July 2016

Purpose

The Home Upgrade Incentive Calculator estimates the energy savings and incentives associated with installed measures completed under Energy Upgrade California Home Upgrade in the SCE and SoCalGas service territories. In order to qualify for an incentive, each project must meet all program requirements. Completion of the calculator does not guarantee that a project meets minimum requirements. Final incentives and savings can increase or decrease depending on the quality of the completed work, the actual scope of work conducted and the timely and accurate submittal of information.



Reset this Calculator

Home Upgrade Incentive Calculator

This calculator estimates the energy savings and incentives associated with installed measures completed under Energy Upgrade California Home Upgrade®. In order to qualify for rebate each project must meet all Home Upgrade requirements.

Directions: Input your project information into the light blue cells in Steps 1, 2 and 4. Review your results in the gray cells in Steps 3 and 4. You may reset the calculator using the button on the top right hand side of the screen.

Customer Information

Customer Last Name	
Customer Street Address	
Project Number	

Home Upgrade Requirements⁵

Each Home Upgrade project must meet all of the following:

1. Minimum of 10% energy savings or 200 points.
2. At least three (3) qualifying measures installed.
3. A minimum of one (1) of three (3) base measures must be installed.

Step 1: Describe Existing Home Conditions	Choose the appropriate characteristic below:	Step 3: Verify Estimated Energy Savings Results															
Climate Zone		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #00a651; color: white;">Savings</th> <th style="background-color: #00a651; color: white;">Percent Saved</th> </tr> </thead> <tbody> <tr> <td style="background-color: #e0e0e0;">Energy (kWh)</td> <td style="background-color: #e0e0e0;">#N/A</td> <td style="background-color: #e0e0e0;">#N/A</td> </tr> <tr> <td style="background-color: #e0e0e0;">Demand (kW)</td> <td style="background-color: #e0e0e0;">#N/A</td> <td style="background-color: #e0e0e0;">#N/A</td> </tr> <tr> <td style="background-color: #e0e0e0;">Energy (therms)</td> <td style="background-color: #e0e0e0;">#N/A</td> <td style="background-color: #e0e0e0;">#N/A</td> </tr> <tr> <td colspan="2" style="text-align: right;">Overall</td> <td style="background-color: #e0e0e0;">#N/A</td> </tr> </tbody> </table>	Savings		Percent Saved	Energy (kWh)	#N/A	#N/A	Demand (kW)	#N/A	#N/A	Energy (therms)	#N/A	#N/A	Overall		#N/A
Savings			Percent Saved														
Energy (kWh)	#N/A		#N/A														
Demand (kW)	#N/A		#N/A														
Energy (therms)	#N/A		#N/A														
Overall			#N/A														
Vintage																	
Floor Construction																	
Existing Central Air Conditioning Present?																	
Heating																	
Water Heating																	
Number of Stories																	

Step 2: Select Upgrade Measures Installed	Was the measure installed? Choose Y/N	Step 4: Estimate the Incentive
Whole Building Air Sealing - ≥ 15% leakage	No	Points: 0
Whole Building Air Sealing - ≥ 30% leakage	No	Meets three measure minimum? No
Insulate Ductwork to ≥R-8 - 40 points	No	Meets base measure minimum? No
Reduce Duct Leakage to ≤10% ^{1,2} - 25 points	No	Meets at least 10% Energy Savings? #N/A
Reduce Duct Leakage to ≤6% ^{1,2} - 65 points	No	15 Point Base Measure Bonus? 0
Insulate Attic - ≥R30/38 ^{1,3} - 55 points	No	20 Point Base Measure Bonus? 0
Insulate Attic - ≥R44 ¹ - 65 points	No	Meets 10% or 200 points? #N/A
Insulate Floor to ≥R-19 - 55 points	No	What is the final project cost? \$0.00
Wall Insulation to ≥R-13 - 50 points	No	Estimated Incentive (max \$3,000) ⁴ \$0.00
High Performance Dual Pane Windows - U-Factor	No	
Split/Packaged Central Air Conditioner/Heat Pump - ≥ 15 SEER (≥80% AFUE for Packaged Systems or ≥ HSPF)	No	
Natural Gas Central Furnace - ≥92% AFUE - 60 points	No	
Natural Gas Central Furnace - ≥95% AFUE - 70 points	No	
Natural Gas Gravity Wall Furnace - ≥70% AFUE -	No	
Electric Domestic Hot Water (DHW) - 40 points	No	
Gas Storage DHW EF ≥.67 and ≤.69 - 35 points	No	
Gas Storage DHW EF ≥.70 - 45 points	No	
Tankless DHW - EF ≥0.82 - 90 points	No	
Thermostatic Shut-Off Valve ⁴	No	
Thermostatic Shut-Off Valve & Low-Flow ⁴	No	

Home Upgrade Requirements

Each Home Upgrade project must meet all of the following:

1. Minimum of 10% energy savings or 200 points
2. At least three (3) qualifying measures installed
3. A minimum of one (1) of three (3) base measures must be installed

For detailed specifications, please reference the Incentive Application and Home Upgrade Info Sheet.

Directions

Input your project information into the light blue cells in Steps 1, 2, and 4. Review your results in the gray cells in Steps 3 and 4. (Please note that Step 4 includes both input and results.) You may reset the calculator using the button on the top right hand side of the screen.

Customer Information

The Customer Information section is designed to help you keep track of the project on which you are working. Enter the customer's information in the light blue cells of the Customer Information Section.

Customer Information	
Customer Last Name	
Customer Street Address	
Project Number	

Step 1: Describe Existing Home Conditions

- A. Click on the light blue cell and use the drop-down menu to select the appropriate Climate Zone. For help determining the appropriate Climate Zone, please reference the List of Climate Zone Areas by ZIP Code: http://www.energy.ca.gov/maps/renewable/building_climate_zones.html.

Step 1: Describe Existing Home Conditions		Choose the appropriate characteristic below:
Climate Zone		
	(Select from list)	
Floor Construction	1	
Existing Central Air Conditioning	2	
	3	
	4	
Water Heating	5	
	6	
Number of	7	

- B. Click on the light blue cell and use the drop-down menu to select the appropriate Vintage.

Step 1: Describe Existing Home Conditions		Choose the appropriate characteristic below:
Climate Zone		
Vintage		
Floor Construction		
Existing Central Air Conditioning Present?		
Water Heating		
Number of Stories		

- C. Click on the light blue cell and use the drop-down menu to select the appropriate Floor Construction.

Step 1: Describe Existing Home Conditions		Choose the appropriate characteristic below:
Climate Zone		
Vintage		
Floor Construction		
Existing Central Air Conditioning Present?		
Water Heating		
Number of Stories		

Please Note: If the home has both Slab-on-grade and Crawlspace as the Floor Construction, please select the condition with the larger area. If the Floor Construction is 50% Slab-on-grade and 50% Crawlspace, please select the condition that produces the higher energy savings.

- D. Click on the light blue cell and use the drop-down menu to select "AC" if Central Air Conditioning is present or "no AC" if Central Air Conditioning is *not* present.

Step 1: Describe Existing Home Conditions		Choose the appropriate characteristic below:
Climate Zone		
Vintage		
Floor Construction		
Existing Central Air Conditioning Present?		
Water Heating		
Number of Stories		

E. Click on the light blue cell and use the drop-down menu to select the Existing Heating Condition.

Step 1: Describe Existing Home Conditions		Choose the appropriate characteristic below:
Climate Zone		
Vintage		
Floor Construction		
Existing Central Air Conditioning Present?		
Heating		
Water Heating		(Select from list)
Number of Stories		Furnace
		Wall Furnace

F. Click on the light blue cell and use the drop-down menu to select the Existing Water Heating Fuel.

Step 1: Describe Existing Home Conditions		Choose the appropriate characteristic below:
Climate Zone		
Vintage		
Floor Construction		
Existing Central Air Conditioning Present?		
Heating		
Water Heating		
Number of Stories		(Select from list)
		Electric
		Gas

G. Click on the light blue cell and use the drop-down menu to select the Number of Stories in the home.

Step 1: Describe Existing Home Conditions		Choose the appropriate characteristic below:
Climate Zone		
Vintage		
Floor Construction		
Existing Central Air Conditioning Present?		
Heating		
Water Heating		
Number of Stories		
		(Select from list)
		1
		2

Step 2: Select Upgrade Measures Installed

Click the light blue cell and use the drop-down menu to select “Yes” for each measure that was installed.

Step 2: Select Upgrade Measures Installed	Was the measure installed? Choose Y/N
Whole Building Air Sealing - $\geq 15\%$ leakage reduction ¹ - 25 points	No
Whole Building Air Sealing - $\geq 30\%$ leakage reduction ¹ - 45 points	No
Insulate Ductwork to $\geq R-8$ - 40 points	No
Reduce Duct Leakage to $\leq 10\%$ ^{1,2} - 25 points	No
Reduce Duct Leakage to $\leq 6\%$ ^{1,2} - 65 points	No
Insulate Attic - $\geq R30/38$ ^{1,3} - 55 points	No
Insulate Attic - $\geq R44$ ¹ - 65 points	No
Insulate Floor to $\geq R-19$ - 55 points	No
Wall Insulation to $\geq R-13$ - 50 points	No
High Performance Dual Pane Windows - U-Factor ≤ 0.32 - 70 points	No
Split/Packaged Central Air Conditioner/Heat Pump - ≥ 15 SEER ($\geq 80\%$ AFUE for Packaged Systems or \geq HSPF 8.0 for Heat Pumps) - 75 points	No
Natural Gas Central Furnace - $\geq 92\%$ AFUE - 60 points	No
Natural Gas Central Furnace - $\geq 95\%$ AFUE - 70 points	No
Natural Gas Gravity Wall Furnace - $\geq 70\%$ AFUE - 40 points	No
Electric Domestic Hot Water (DHW) - 40 points	No
Gas Storage DHW EF ≥ 0.67 and ≤ 0.69 - 35 points	No
Gas Storage DHW EF ≥ 0.70 - 45 points	No
Tankless DHW - EF ≥ 0.82 - 90 points	No
Thermostatic Shut-Off Valve ⁴	No
Thermostatic Shut-Off Valve & Low-Flow ⁴	No

Please Note:

- You may only select “Yes” for one of the Whole Building Air Sealing choices (i.e., Did you achieve $\geq 15\%$ leakage reduction or $\geq 30\%$ leakage reduction?)

Whole Building Air Sealing - $\geq 15\%$ leakage reduction ¹ - 25 points	No
Whole Building Air Sealing - $\geq 30\%$ leakage reduction ¹ - 45 points	No

- You may only select “Yes” for one of the Reduce Duct Leakage choices (i.e., Did you achieve $\leq 10\%$ leakage reduction or $\leq 6\%$ leakage reduction?)

Reduce Duct Leakage to $\leq 10\%$ ^{1,2} - 25 points	No
Reduce Duct Leakage to $\leq 6\%$ ^{1,2} - 65 points	No

- You may only select “Yes” for one of the Insulate Attic choices (i.e., Did you install $\geq R30/38$ insulation or $\geq R44$ insulation?)
 - $\geq R30$ is required in Climate Zones 2-10 and $\geq R38$ is required in Climate Zones 1,11-16

Insulate Attic - $\geq R30/38^{1,3}$ - 55 points	No
Insulate Attic - $\geq R44^1$ - 65 points	No

- You may only select “Yes” for one of the Furnace choices (i.e., Did you install a Natural Gas Central Furnace - $\geq 92\%$ AFUE, a Natural Gas Central Furnace - $\geq 95\%$ AFUE, or a Natural Gas Gravity Furnace - $\geq 70\%$ AFUE?)

Natural Gas Central Furnace - $\geq 92\%$ AFUE - 60 points	No
Natural Gas Central Furnace - $\geq 95\%$ AFUE - 70 points	No
Natural Gas Gravity Wall Furnace - $\geq 70\%$ AFUE - 40 points	No

- You may only select “Yes” for one of the DHW choices (i.e., Did you install an Electric DHW, Gas Storage DHW - EF $\geq .67$ and $\leq .69$, a Gas Storage DHW - EF $\geq .70$, or a Tankless DHW EF $\geq .82$?)

Electric Domestic Hot Water (DHW) - 40 points	No
Gas Storage DHW EF $\geq .67$ and $\leq .69$ - 35 points	No
Gas Storage DHW EF $\geq .70$ - 45 points	No
Tankless DHW - EF ≥ 0.82 - 90 points	No

- The measures Thermostatic Shut-Off Valve and Thermostatic Shut-Off Valve & Low-Flow Showerhead are optional add-ons. These measures do not count toward the three measure minimum requirement, but if installed can increase energy savings.

Thermostatic Shut-Off Valve ⁴	No
Thermostatic Shut-Off Valve & Low-Flow ⁴	No

Step 4: Estimate the Incentive

Enter the final project cost in the light blue cell.

Please Note: The maximum incentive is \$3,000 or 50% of the final project cost.

Step 4: Estimate the Incentive	
Points	0
Meets three measure minimum?	No
Meets base measure minimum?	No
Meets at least 10% Energy Savings?	#N/A
15 Point Base Measure Bonus?	0
20 Point Base Measure Bonus?	0
Meets 10% or 200 points?	#N/A
What is the final project cost?	\$0.00
Estimated Incentive (max \$3,000)*	\$0.00



Step 3: Verify Estimated Energy

Based on the measures selected in Step 2, the estimated energy savings results will appear in Step 3.

Step 3: Verify Estimated Energy Savings Results		
	Savings	Percent Saved
Energy (kWh)	663.3	6.5%
Demand (kW)	0.555	17.4%
Energy (therms)	75.2	16.2%
	Overall	12.0%

Please Note: The project must meet a minimum of 10% energy savings or 200 points in order to qualify for incentives.

Step 4: Estimate the Incentive

Based on the measures selected in Step 3 and the total project cost entered in Step 4, the estimated incentive results will appear in Step 4.

Please Note:

- The maximum incentive is \$3,000 or 50% of the final project cost (e.g., If the final project cost is \$3,000 and the installed measures earn 200 points, your customer will receive a maximum of \$1,500. If the final project cost is \$4,000 and the installed measures earn 200 points, your customer will receive \$2,000.)

Step 4: Estimate the Incentive	
Points	200
Meets three measure minimum?	Yes
Meets base measure minimum?	Yes
Meets at least 10% Energy Savings?	Yes
15 Point Base Measure Bonus?	0
20 Point Base Measure Bonus?	0
Meets 10% or 200 points?	Yes
What is the final project cost?	\$3,000.00
Estimated Incentive (max \$3,000)*	\$1,500.00

Step 4: Estimate the Incentive	
Points	200
Meets three measure minimum?	Yes
Meets base measure minimum?	Yes
Meets at least 10% Energy Savings?	Yes
15 Point Base Measure Bonus?	0
20 Point Base Measure Bonus?	0
Meets 10% or 200 points?	Yes
What is the final project cost?	\$4,000.00
Estimated Incentive (max \$3,000)*	\$2,000.00

- The Estimated Incentive gray cell will not calculate a value until the project meets either the 200 points minimum or 10% energy savings minimum. The project must also meet the three-measure minimum and the base measure minimum.

Step 4: Estimate the Incentive	
Points	70
Meets three measure minimum?	No
Meets base measure minimum?	No
Meets at least 10% Energy Savings?	No
15 Point Base Measure Bonus?	0
20 Point Base Measure Bonus?	0
Meets 10% or 200 points?	No
What is the final project cost?	\$5,000.00
Estimated Incentive (max \$3,000)*	\$0.00

- The Estimated Incentive gray cell will show \$0.00 if no value is entered in the “What is the final project cost?” light blue cell.

Step 4: Estimate the Incentive	
Points	200
Meets three measure minimum?	Yes
Meets base measure minimum?	Yes
Meets at least 10% Energy Savings?	Yes
15 Point Base Measure Bonus?	0
20 Point Base Measure Bonus?	0
Meets 10% or 200 points?	Yes
What is the final project cost?	
Estimated Incentive (max \$3,000)*	\$0.00