

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.



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.

Reset this Calculator

Customer Information	
Customer Last Name	
Customer Street Address	
Project Number	

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.
- 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 Estimate	d Energy Savin	igs Results
Climate Zone			Savings	Percent
Vintage				Saved
Floor Construction		Energy (k₩h)		#N/A
Existing Central Air Conditioning Present?		Demand (k₩)	#N/A	#N/A
Heating		Energy (therms)	#N/A	#N/A
Water Heating			Overa	II #N/A
Number of Stories				

Number of Stories		Overall	#INIW
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	leets 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) ⁶	\$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 DH₩ EF ≥.67 and ≤.69 - 35 points	No		
Gas Storage DHW EF ≥. 70 - 45 points	No		
Tankless DHW - EF ≥0.82 - 30 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

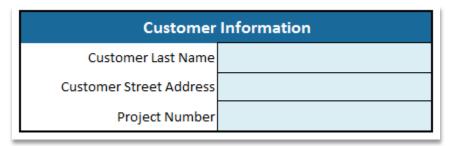
For detailed specifications, please reference the Incentive Application and Home Upgrade Info Sheet.

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.

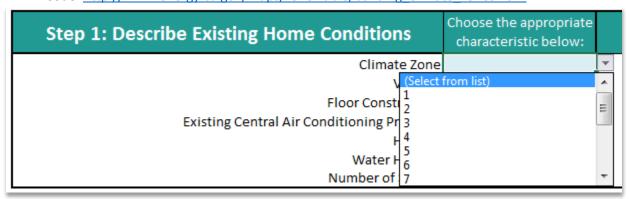
Customer Information

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.

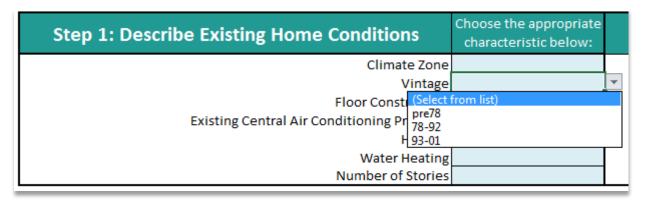


Step 1: Describe Existing Home Conditions

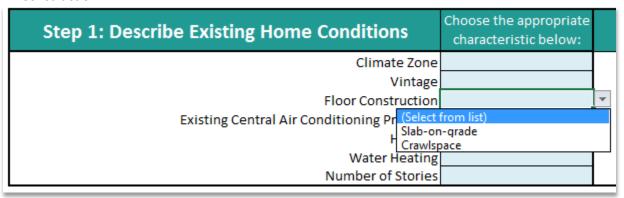
A. Click on the light blue cell and use the drop-down menu to select the appropriate Climate Zone. For help determining the appropriate Climate Zone, please reference the List of Climate Zone Areas by ZIP Code: http://www.energy.ca.gov/maps/renewable/building_climate_zones.html.



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

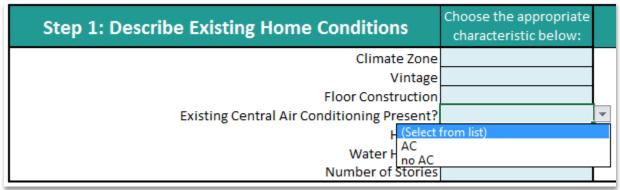


C. Click on the light blue cell and use the drop-down menu to select the appropriate Floor Construction.

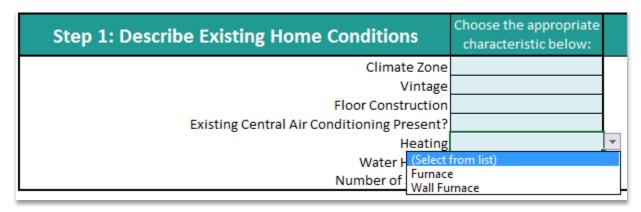


Please Note: If the home has both Slab-on-grade and Crawlspace as the Floor Construction, please select the condition with the larger area. If the Floor Construction is 50% Slab-on-grade and 50% Crawlspace, please select the condition that produces the higher energy savings.

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.



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



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 Select		
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)	
Step 2: Select Upgrade Measures Installe 2	Installed: Choose 1/1v	

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 - ≥15% leakage reduction¹ - 25 points	No	¥
Whole Building Air Sealing - ≥30% leakage reduction ¹ - 45 points No		
Insulate Ductwork to ≥R-8 - 40 points	INU	
Reduce Duct Leakage to ≤10% ^{1,2} - 25 points	No	
Reduce Duct Leakage to ≤6% ^{1,2} - 65 points	No	
Insulate Attic - ≥R30/38 ^{1,3} - 55 points	No	
Insulate Attic - ≥R44 ¹ - 65 points	No	
Insulate Floor to ≥R-19 - 55 points	No	
Wall Insulation to ≥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 (≥80%	No	
AFUE for Packaged Systems or ≥ HSPF 8.0 for Heat Pumps) - 75 points	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 - 40 points	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	

Please Note:

• You may only select "Yes" for one of the Whole Building Air Sealing choices (i.e., Did you achieve ≥15% leakage reduction or ≥30% leakage reduction?)

Whole Building Air Sealing - ≥15% leakage reduction ¹ - 25 points	No
Whole Building Air Sealing - ≥30% leakage reduction¹ - 45 points	No

You may only select "Yes" for one of the Reduce Duct Leakage choices (i.e., Did you achieve
 ≤10% leakage reduction or ≤6% leakage reduction?)

Reduce Duct Leakage to ≤10% 1,2 - 25 points	No
Reduce Duct Leakage to ≤6% 1,2 - 65 points	No

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

Insulate Attic - ≥R30/38 ^{1,3} - 55 points	No
Insulate Attic - ≥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 - ≥92% AFUE, a Natural Gas Central Furnace - ≥95% AFUE, or a Natural Gas Gravity Furnace - ≥70% AFUE?)

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 - 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 ≥.67 and ≤.69, a Gas Storage DHW - EF ≥.70, or a Tankless DHW EF ≥.82?)

No
No
No
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

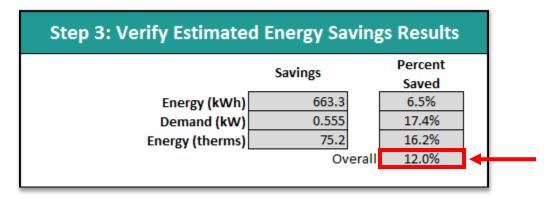
Enter the final project cost in the light blue cell.

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

Step 4: Estimate the Incentive	9
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.



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			