



Taking steps to upgrade equipment and reduce energy demand, such as replacing inefficient lighting and making seasonal adjustments to control heating and cooling, could be an effective strategy to reduce operating costs. The C-BEST Program can help you pinpoint energy-efficiency improvements that may help increase your bottom line.

## INCENTIVES AND FINANCING

We offer eligible customers incentives and support in obtaining additional financing to make upgrades more affordable, which could help you save now and in the future.

## ELIGIBILITY REQUIREMENTS

Qualifying businesses must have an active commercial account in the SoCalGas service territory and use less than 50,000 therms per year. In addition, businesses must not have received an incentive for the same equipment from SoCalGas in the past five years. Businesses located in San Bernadino or Riverside counties are not eligible to participate in the C-BEST Program.

## BASIC REQUIREMENTS

All equipment must be new and natural gas fired. Fuel switching does not qualify. All equipment must replace older equipment, with the exception of commercial cooking equipment. Qualified equipment must be installed after January 1, 2023. Additionally, the purchased date of the equipment must be within 18 months of the application submittal date, unless indicated otherwise. All required efficiencies must exceed California Title 20 and 24 standards. For the SoCalGas Qualified Product List (QPL) for broilers, visit: <https://caenergywise.com/rebates>

### LEARN MORE

For questions and support, contact our team.  
P: **844-523-9981**  
E: **C-BEST@CAEnergyPrograms.com**

For more information, visit:  
**CAEnergyPrograms.com/C-BEST**

ICF is a SoCalGas authorized contractor responsible for implementing this program through 12/31/2023.



## HOW TO APPLY

1. Work with your C-BEST account manager to determine your eligibility and assess your property's needs.
2. Purchase energy-efficient equipment that meets program specifications.
3. Your C-BEST account manager will provide support and guidance, where needed, with respect to all eligibility requirements for equipment. Find equipment that can qualify for SoCalGas rebates by reviewing the equipment specification sheet. Install energy-efficient equipment with the contractor of your choice.  
**NOTE:** Contractors working on Heating, Ventilation, and Air Conditioning (HVAC) energy efficiency projects with incentives over \$3,000 must meet at least one of the following criteria:
  - A. Completed an accredited HVAC apprenticeship.
  - B. Is enrolled in an accredited HVAC apprenticeship.
  - C. Completed at least five years of work experience at the journey level according to the Department of Industrial Relations definition, Title 8, Section 205, of the California Code of Regulations, passed a practical and written HVAC system installation competency test, and received credentialed training specific to the installation of the technology being installed.
  - D. Has a C-20 HVAC contractor license issued by the California Contractors State License Board (CSLB).
4. Submit your completed rebate application, including signed Terms and Conditions and required supporting documentation, to your C-BEST account manager.

## REQUIRED DOCUMENTATION

- A copy of a recent SoCalGas bill for the natural gas account serving the energy-efficient product. Address and account number must match the name, site address, and account number on the application.
- A copy of the equipment specification sheets.
- A copy of **PAID IN FULL** receipt(s) and contractor invoice(s). **NOTE:** Cash on delivery (COD) and estimates are not acceptable proof of payment.
- Receipts/invoices must show a zero balance and list:
  - Vendor name and information
  - Purchase date
  - Product manufacturer, model number, and serial number(s)

Contact your C-BEST account manager for support in completing your application or gathering the required documentation.

You may submit your application via email to **C-BEST@CAEnergyPrograms.com** or by mail to:

**C-BEST Program c/o ICF  
555 W. 5th Street Suite 3100  
Los Angeles, CA 90013**

The Commercial Building Energy Solutions and Technologies Program is funded by California utility customers and administered by Southern California Gas Company (SoCalGas) under the auspices of the California Public Utilities Commission. ICF provides marketing support for this program pursuant to a contract awarded to ICF by SoCalGas. Program funds, including any funds utilized for rebates or incentives, will be allocated on a first-come, first-served basis until such funds are no longer available. This program may be modified or terminated without prior notice. The selection, purchase, and ownership of goods and/or services are the sole responsibility of customer. **SoCalGas makes no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods or services selected by customer. SoCalGas does not endorse, qualify or guarantee the work of any third party contractor utilized in connection with this program.** Customers who choose to participate in this program are not obligated to purchase any additional services offered by any such contractor. Eligibility requirements apply; see the program conditions for details.

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## TERMS AND CONDITIONS

1. I understand that the Commercial Building Energy Solutions and Technologies Program or C-BEST Program is available to all SoCalGas commercial customers that hold an active service account with a service address located outside San Bernardino County and Riverside County and use less than 50,000 therms annually.
2. I represent that (a) I am an eligible SoCalGas commercial customer, (b) that I have installed the energy-efficiency equipment specified for my project (Project) in the Program's online application system (Equipment) between January 1, 2023 and December 31, 2023, (c) the date of purchase of such Equipment is within 18 months of its installation date, and (d) I would not have purchased the Equipment at this time if the Program had not offered a monetary rebate/incentive. I understand that this application and the paid itemized invoice must be received through the Program's online application system no later than December 31, 2023, unless otherwise specified by an authorized Program representative. I understand that incomplete and incorrect applications will not be processed. Applications can be submitted directly to the Program's online application system; via email to: C-BEST@CAEnergyPrograms.com; or by postal mail to: C-BEST Program, c/o ICF, 555 W 5th St. Ste 3100, Los Angeles, CA, 90013. Applications submitted by email or postal mail will be entered into the online application system by the Program's application processing team.
3. I understand that the installation of the Equipment may require ICF Resources, LLC ("ICF") and/or its subcontractors to enter my facility. I agree to permit ICF and its authorized subcontractors to complete an energy survey and install the Equipment at my facility, as applicable.
4. I acknowledge that I have been notified of SoCalGas's California Consumer Privacy Act (CCPA) Policy. Personal information may be solicited; visit [socialgas.com/CCPA](https://socialgas.com/CCPA) to review SoCalGas's CCPA Notice at Collection.
5. I will allow, if requested, a representative from SoCalGas, ICF, the California Public Utilities Commission (CPUC), and/or any authorized third party reasonable access to the property where the Equipment is located to verify the installed Equipment before a rebate/incentive is paid.

I understand that SoCalGas, ICF, CPUC and/or any authorized third party may contact the qualifying Equipment vendor and/or installer to verify purchase and/or installation of the Equipment and may provide my name and/or address to complete this verification. I understand this inspection is for the purpose of determining that the installed Equipment meets all Program requirements.

I understand that rebate/incentive applications that are submitted to SoCalGas may be randomly selected for inspection to ensure Program and quality control compliance, and that a virtual video inspection may be requested to verify the installation of the Equipment prior to rebate or incentive payment.

6. I understand that my Project may be selected for evaluation studies and or Program measurement by contractors appointed by the CPUC. These studies are used to analyze and improve Program performance. I agree to participate by responding to inquiries from these contractors in a timely manner.
7. I understand that in no case will the Program pay more than 100 percent of the actual purchase price of any Equipment for which a rebate or incentive is eligible or the maximum allowance per unit, whichever is less. For the purposes of this paragraph, "purchase price" means the cost of the Equipment plus actual and verifiable installation labor charges paid by the customer to the installer of such Equipment, it being understood that customers who self-install shall not charge installation labor. Sales and other taxes are not included as part of the Equipment purchase price.

I understand that I cannot receive a rebate or incentive for the same Equipment from more than one California Investor-Owned Utility (IOU) participating in this Program or other third-party programs offering rebates, financing, and other incentives funded by California utility customers and administered by an IOU under the auspices of the CPUC. I understand that I cannot receive a rebate or incentive for any Equipment for which I have received a rebate or incentive from SoCalGas in the five years prior to the application date.

8. I agree to remove and dispose of the equipment being replaced by the Equipment in accordance with all federal, state, and local laws.
9. I certify that the information on this application is true and correct, and that the IRS Tax ID provided is accurate. I understand that rebate/incentive payments are based on related energy benefits over the life of the Equipment. I agree to maintain the energy-efficient measure(s) specified in this application for the life of the Equipment or a period of five (5) years from receipt of rebate/incentive funds, whichever is less. If the above ceases to be the case, I shall refund a prorated amount of rebate/incentive dollars to SoCalGas based on the actual period of time for which I provided the related energy benefits as a customer of SoCalGas. I understand that this Program or individual measures offered as part of this Program may be modified or terminated without notice.

I certify that all Equipment was purchased new, and I understand that resale products and products leased, rebuilt, rented, received from insurance claims, or won as a prize; or, new parts installed in existing products, do not qualify. I understand rebates or incentives will only be paid for Equipment that meets the specifications of the Program.

10. I understand that rebates or incentives could be taxable, and that I am urged to consult my tax advisor concerning the taxability of any rebates or incentives paid through this Program. Rebates or incentives greater than \$600 will be reported to the IRS on Form 1099 unless I am a corporation or have tax exempt status and have noted as such in this application. Neither SoCalGas nor ICF are responsible for any taxes that may be imposed on me or my business as a result of the receipt of a rebate or incentive.
11. **SoCalGas makes no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods or services I select (including the Equipment). SoCalGas does not endorse, qualify, or guarantee the work of any contractor utilized in connection with this Program. I acknowledge that I am not obligated to purchase any additional goods or services offered by any such contractor due to my choice to participate in this Program. I understand that my reliance on warranties is limited to any warranties that may arise from or be provided by contractors or vendors providing goods or performing services in connection with Equipment. Neither SoCalGas nor ICF are responsible for assuring the design, engineering, or construction of the facility or installation of the Equipment are proper or comply with any particular laws (including patent laws), codes, or industry standards. Neither SoCalGas nor ICF make any representations of any kind regarding the results to be achieved by the Equipment or the adequacy, safety, reliability, and/or efficiency of such Equipment. The selection, purchase, and ownership of the Equipment are my sole responsibility.**
12. **To the maximum extent permitted under applicable law, neither SoCalGas nor ICF nor any of their respective affiliates shall be liable to me or any other parties for any indirect, special, consequential, or incidental damages, regardless of the theory of recovery, caused by, in connection with, or arising from any activities associated with this Program.**

## TERMS AND CONDITIONS *(Continued)*

13. Neither SoCalGas nor ICF shall have (a) any obligation to maintain, remove, or perform any work whatsoever on the installed Equipment, or (b) any liability arising from a contractor's installation of the applicable Equipment or its failure to perform, for failure of the Equipment to function, for any damage to my premises caused by the contractor, or for any damages to property or injuries to persons caused by the Equipment.

Important: In accordance with CPUC Code section 399.4(b), the customer or their contractor must provide proof of permit closure when installing HVAC equipment. I acknowledge that I must provide documentation completed and signed by a licensed contractor when applying for rebates or incentives on HVAC Equipment.

14. This Program (including these Terms and Conditions) may be revised at any time without notice. In such an instance, unless otherwise prohibited under applicable law (including any CPUC order or directive), signed applications will be processed to completion under the Terms and Conditions in effect of the date of such signed application.
15. ICF is a SoCalGas authorized contractor responsible for implementing the C-BEST Program through December 31, 2023.

## CUSTOMER SIGNATURE *(Original or digital signature required)*

- I HAVE READ AND UNDERSTAND THE TERMS AND CONDITIONS. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCTS FOR WHICH I AM REQUESTING A REBATE MEET THE REQUIREMENTS LISTED ON PAGES 7-10.

Check One:  Customer  Contractor (as authorized agent for Customer)

As applicable:  By checking this box, I confirm that I have used a licensed contractor, as appropriate, and followed applicable permitting requirements for this installation.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## CONTRACTOR SIGNATURE *(Complete only for HVAC measures)*

- I HAVE READ AND UNDERSTAND THE TERMS AND CONDITIONS. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE EQUIPMENT IS ELIGIBLE FOR REBATE(S) ARE INSTALLED, OPERATIONAL, AND MEET THE REQUIREMENTS OF THIS PROGRAM.

Important: In accordance with California Public Utilities Commission Code section 399.4(b), the customer or their contractor must provide proof of permit closure when installing heating, ventilation, and air conditioning (HVAC) equipment. **Name and address shown on proof of permit closure must match the name and installed address on this application form.** You and your contractor must also complete a C-BEST HVAC Permit Closure Form. Your C-BEST account manager will provide complete details.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# APPLICATION FORM

## ACCOUNT HOLDER INFORMATION

			-				-					-	
--	--	--	---	--	--	--	---	--	--	--	--	---	--

SoCalGas Account Number

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Name (as it appears on your SoCalGas bill)

---

Rate Schedule (GR, GM)

## SITE ADDRESS AND SITE CONTACT INFORMATION

Please include site contact best suited to coordinate installations and/or inspections.

---

Address

---

City

---

ZIP

---

Name of Site Contact for Installations and/or Inspections

---

Site Contact Daytime Phone Number

---

Site Contact Email Address

## ADDITIONAL PROPERTY INFORMATION\*

Do applicants predominantly speak a language other than English?  Yes  No

Languages Spoken (select all that apply):

Armenian  Cantonese  Korean  Mandarin  Spanish  Tagalog  Vietnamese  Other \_\_\_\_\_

\*This information is used to determine eligibility as a Hard to Reach (HTR) property. All incentives will be 16 percent greater for properties located in Disadvantaged Communities (DAC) and properties that qualify as HTR. In addition, the Program tracks participation among HTR properties and properties located in DACs. DAC eligibility is determined by location within a DAC ZIP code as defined by CalEnviroScreen 3.0. HTR is defined using the definition set forth in CPUC Decision 18-05-041.

## APPLICATION FORM *(Continued)*

### CONTRACTOR INFORMATION

Non-corporation     Exempt (e.g., tax exempt, non-profit)

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Company Representative Name

\_\_\_\_\_  
CSLB Number

\_\_\_\_\_  
Daytime Phone Number

\_\_\_\_\_  
Email Address

### PAYEE INFORMATION

Please read section below if rebate is being sent to someone other than the customer of record.

Tax Status (if business):     Corporation     Partnership     LLC     Individual or Sole Proprietor     Exempt (i.e., tax exempt, non-profit)

\_\_\_\_\_  
Payee Name (make rebate check payable to)

\_\_\_\_\_  
Federal Tax ID Number or SSN

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
City

\_\_\_\_\_  
ZIP

### PAYMENT RELEASE AUTHORIZATION *(Signature required)*

PROPERTY OWNER OR PROPERTY MANAGER, AS AUTHORIZED AGENT FOR PROPERTY OWNER: Your authorization is required if the rebate check is to be made payable to another individual or entity. Please sign below. I am authorizing this payment of my rebate to the third party ("Payee") named above and I understand that I will not be receiving a rebate check from SoCalGas. I also understand that my release of the payment to the Payee does not exempt me from the rebate requirements outlined in this application. If Payee is a business, federal tax ID or Social Security Number must be provided. Southern California Gas Company will report this payment made to the third party on IRS form 1099 as "Other Income" to you (the customer receiving the benefit of the rebate payment) unless the payment is less than \$600, or you have identified yourself as a corporation or exempt. You are urged to consult your tax advisor concerning the tax requirements of rebates. Southern California Gas Company is not responsible for any taxes that may be imposed on you as a result of this rebate.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## PRODUCT SPECIFICATIONS AND REBATES

**REQUIREMENTS:** Must have natural gas distributed to the installation address by SoCalGas and product must comply with energy efficiency specifications below. Please look for the Uniform Energy Factor or Thermal Efficiency on equipment specification sheet or on the packaging box.

**INCREASED REBATES FOR QUALIFYING PROPERTIES:** The C-BEST Program is pleased to offer higher rebate amounts for the installation of measures in certain qualifying properties. Your C-BEST account manager will confirm your eligibility for increased rebates; qualifying factors include:

- Property is located in a Disadvantaged Community as defined by CalEnviroScreen, a tool of the California Environmental Protection Agency (CalEPA)
- Majority of tenants speak a primary language other than English
- Property is located in a rural area within the SoCalGas service territory

**EQUIPMENT SELECTION SUPPORT:** A C-BEST account manager can provide guidance in selecting equipment that meets Program requirements. Contact us at **C-BEST@CAEnergyPrograms.com** or **1-844-523-9981** for support.

Product	Quantity Installed (A)	Rebate per Quantity Installed (B)	Rebate Total Amount (A x B)
<b>BOILERS AND WATER HEATING</b>			
<b>HOT WATER BOILERS SMALL</b> Small Tier 1 Boiler Rating: <200 kBtu/hr, ≥0.87 UEF		<b>STANDARD:</b> \$1 per kBtuh	
		<b>INCREASED:</b> \$1.50 per kBtuh	
<b>PROCESS STEAM BOILERS</b> Input Rating: ≤20,000 kBtu/hr, ≥83% CE		<b>STANDARD:</b> \$3 per kBtuh	
		<b>INCREASED:</b> \$4.50 per kBtuh	
<b>PROCESS WATER BOILERS</b> Input Rating: ≤20,000 kBtu/hr Tier 1: ≥85% CE		<b>STANDARD:</b> \$2.50 per kBtuh	
		<b>INCREASED:</b> \$3.50 per kBtuh	
<b>PROCESS WATER BOILERS</b> Input Rating: ≤20,000 kBtu/hr Tier 2: ≥90% CE		<b>STANDARD:</b> \$7 per kBtuh	
		<b>INCREASED:</b> \$10 per kBtuh	
<b>SPACE-HEATING BOILERS HOT WATER</b> Medium Tier 2 Boiler Rating: 300-2,500 kBtuh, ≥94% TE		<b>STANDARD:</b> \$3 per kBtuh	
		<b>INCREASED:</b> \$4.50 per kBtuh	
<b>STEAM TRAP</b> ≥12 hours of average daily use, must replace failed steam trap		<b>STANDARD:</b> \$150 each	
		<b>INCREASED:</b> \$210 each	
<b>GAS MODULATION VALVE</b> Modulating Gas Valve for Com Dryers up to 200 lbs cap AOE		<b>STANDARD:</b> \$650 each	
		<b>INCREASED:</b> \$800 each	

## PRODUCT SPECIFICATIONS AND REBATES (Continued)

Product	Quantity Installed (A)	Rebate per Quantity Installed (B)	Rebate Total Amount (A x B)
<b>TANK INSULATION (INDOOR)</b> Low-temperature application: 120-170 degrees F solution 1" insulation thickness		<b>STANDARD:</b> \$6 per square foot	
		<b>INCREASED:</b> \$8.50 per square foot	
<b>TANK INSULATION (INDOOR)</b> High-temperature application: 170-200 degrees F solution 1" insulation thickness		<b>STANDARD:</b> \$6 per square foot	
		<b>INCREASED:</b> \$8.50 per square foot	
<b>TANK INSULATION (INDOOR)</b> Low-temperature application: 120-170 degrees F solution 2" insulation thickness		<b>STANDARD:</b> \$8 per square foot	
		<b>INCREASED:</b> \$11 per square foot	
<b>TANK INSULATION (INDOOR)</b> High-temperature application: 170-200 degrees F solution 2" insulation thickness		<b>STANDARD:</b> \$8 per square foot	
		<b>INCREASED:</b> \$11 per square foot	
<b>TANKLESS WATER HEATERS</b> Small Tier 2 <200 kBtu/hr, ≥0.87 UEF		<b>STANDARD:</b> \$6 per kBtuh	
		<b>INCREASED:</b> \$8.50 per kBtuh	

During the period of April 1, 2023 to September 30, 2023, customers who are eligible, may have measure 541952, Tankless Water Heater <200 kBtu/hr (Small / Medium), Tier 2 (>=0.87 UEF) directly installed at a price of \$3,000. If customer participates in the direct install program, the Tankless Water Heater <200 kBtu/hr (Small / Medium), Tier 2 (>=0.87 UEF) must be purchased between April 1, 2023 - September 30, 2023, to qualify.

Incentive Per Property:

Please reference Implementation Plan for final and current Measure Compensation Rates.

### FOOD SERVICES

<b>CONVEYOR BROILERS</b> Automatic conveyor broilers belt width <20 inches See Qualified Products List (QPL): <a href="https://caenergywise.com/rebates/">https://caenergywise.com/rebates/</a>		<b>STANDARD:</b> \$1,400 each	
		<b>INCREASED:</b> \$1,900 each	
<b>CONVEYOR BROILERS</b> Automatic conveyor broilers belt width 20-26 inches See QPL: <a href="https://caenergywise.com/rebates/">https://caenergywise.com/rebates/</a>		<b>STANDARD:</b> \$1,800 each	
		<b>INCREASED:</b> \$2,500 each	
<b>CONVEYOR BROILERS</b> Automatic conveyor broilers belt width >26 inches See QPL: <a href="https://caenergywise.com/rebates/">https://caenergywise.com/rebates/</a>		<b>STANDARD:</b> \$3,000 each	
		<b>INCREASED:</b> \$4,200 each	
<b>COMMERCIAL COMBINATION OVEN GAS</b> <15 pan capacity Steam Mode ≥38% Convection Mode ≥44%		<b>STANDARD:</b> \$1,500 each	
		<b>INCREASED:</b> \$2,100 each	



**PRODUCT SPECIFICATIONS AND REBATES** (Continued)

Product	Quantity Installed (A)	Rebate per Quantity Installed (B)	Rebate Total Amount (A x B)
<b>COMMERCIAL COMBINATION OVEN GAS</b> 15-28 pan capacity Steam Mode ≥38% Convection Mode ≥44%		<b>STANDARD:</b> \$1,800 each	
		<b>INCREASED:</b> \$2,500 each	
<b>COMMERCIAL COMBINATION OVEN GAS</b> >28 pan capacity Steam Mode ≥38% Convection Mode ≥44%		<b>STANDARD:</b> \$2,500 each	
		<b>INCREASED:</b> \$3,500 each	
<b>CONVECTION OVENS</b> Cooking Energy Efficiency ≥46% ENERGY STAR®		<b>STANDARD:</b> \$700 each	
		<b>INCREASED:</b> \$980 each	
<b>FRYERS</b> Cooking Energy Efficiency ≥50% ENERGY STAR		<b>STANDARD:</b> \$750 each	
		<b>INCREASED:</b> \$1,000 each	
<b>GRIDDLES</b> Cooking Energy Efficiency ≥46% ENERGY STAR		<b>STANDARD:</b> \$200 each	
		<b>INCREASED:</b> \$280 each	
<b>DOUBLE RACK OVENS</b> Heavy load cooking energy efficiency ≥50% ENERGY STAR		<b>STANDARD:</b> \$2,000 each	
		<b>INCREASED:</b> \$2,800 each	
<b>PRESSURELESS STEAMERS</b> Cooking Energy Efficiency ≥38% ENERGY STAR		<b>STANDARD:</b> \$1,800 each	
		<b>INCREASED:</b> \$2,500 each	
<b>POOL</b>			
<b>POOL HEATERS</b> ≥84% TE Indoor		<b>STANDARD:</b> \$2 per kBtuh	
		<b>INCREASED:</b> \$3 per kBtuh	
<b>TOTAL AMOUNT OF ALL REBATES</b>			

## ABBREVIATIONS

AFUE	Annual Fuel Utilization Efficiency
CEE	Consortium for Energy Efficiency
CA	Common Area
DAC	Disadvantaged Communities
DHW	Domestic Hot Water
EF	Efficiency Factor
GPM	Gallons Per Minute
HE	High Efficiency
HH	Household
HTR	Hard-to-Reach
IMEF	Integrated Modified Energy Factor
IU	In-Unit
IWF	Integrated Water Factor
SF	Square Foot
TE	Thermal Efficiency
TSV	Thermostatic Shower Valve
UEF	Uniform Energy Factor

## DEFINITIONS

**AFUE:** Ratio of annual output energy to annual input energy; includes any non-heating season pilot input loss and, for natural gas or oil-fired furnaces or boilers, does not include electric energy

**TE:** One hundred times useful energy output divided by input energy

**UEF:** New energy efficiency rating

## PRODUCT LOCATION FORM

Please provide all the information requested on this form; it is important for processing and inspection. Rebate applications that are submitted to SoCalGas may be randomly selected for inspection to ensure program and quality control compliance.

Products Installed By:  Self  Contractor

Required Information	Example	Location 1	Location 2	Location 3	Location 4	Location 5	Location 6	Location 7
Product Location Address	1234 Maple St.							
Product Location	Suite 101							
Type of Product Installed	Water heater							
Product Make	GE							
Product Model Number	HDA2000							
Product Rating*	0.67							
Serial Number	12345678							
Product Capacity (water heater or boiler-gallons)	40 gallons							
Product Location†	Kitchen							
Date Purchased	1/1/23							
Date Installed	1/2/23							

\*Product rating: water heaters or boilers energy factor, pool heater thermal efficiency, furnace or heater AFUE, UEF, or BTUH

†Describe product location in detail (e.g., closet, stock area, roof, boiler room, kitchen)

# HVAC AND RESOURCE INFORMATION

## Guide for Heating, Ventilation, and Air Conditioning (HVAC) systems

### STEP 1: FOCUS ON QUALITY INSTALLATION

How well your HVAC system performs, and how much it costs to operate, depends in part on the proper installation of the system. Improper HVAC installation may cost more in the long run—using more electricity, running up your bill, and making your air conditioner work harder. This can shorten equipment life. Common installation problems such as low airflow, improper charge, or duct leakage can reduce the efficiency and capacity of your air conditioner.

### STEP 2: CONTRACTOR SELECTION

Hiring a licensed contractor who obtains the required building permit and has knowledge of, and complies with, local codes, ordinances, and the requirements of the Building Energy Efficiency Standards increases the likelihood that your system will be properly installed and will work efficiently, quietly, and safely. For information on the Building Energy Efficiency Standards (State Administrative Code, Title 24, Part 6), visit [www.bsc.ca.gov](http://www.bsc.ca.gov) and search “CODES.”

Licensed contractors, in general:

- Have a minimum of four full years of experience performing the trade
- Have taken a law and trade exam
- Are required to have a contractor’s bond
- Have been the subject of a background check
- Are regulated by the California Contractors State License Board (see contact information on the following page)

Installers who perform contracting work without having a license have avoided these quality assurance requirements and, in addition, may be in violation of the law.

### STEP 3: QUALITY ASSURANCE

Cities and counties inspect a sample of projects when a construction permit is issued. A building permit, issued by a local authority, may be required for HVAC installations and modifications including, but not limited to, the following:

- New HVAC installation
- HVAC change-out/remodel/replacement including the air handler, coil, furnace, or condenser
- Relocation of an existing HVAC unit
- Removal of an HVAC unit or system
- Added ducting

A building inspector may perform a quality assurance check on the installation of the equipment ensuring the following:

- System is installed to comply with all applicable state, county, or city codes
- Work specified under the permit has been performed properly
- Required compliance documents have been submitted

**Important:** In accordance with California Public Utilities Code section 399.4(b), the customer or their contractor must provide proof of permit closure when installing a natural gas furnace. Name and address shown on proof of permit closure must match the name and installed address listed on the application form.

## RESOURCE INFORMATION

### ENERGY STAR®

- Find products that carry the ENERGY STAR label.
- Find retailers or suppliers who carry ENERGY STAR products.
- Find information on how to improve your home and ways to help cut energy costs.

For more information visit [energystar.gov](http://energystar.gov) or call **1-888-STAR-YES-1** (1-888-782-7937).

### SOCALGAS

Visit [socalgas.com](http://socalgas.com) to review a list of qualifying pool heaters.

### CALIFORNIA ENERGY COMMISSION

- Application information
- Information about other energy efficiency programs

For more information visit [energy.ca.gov/appliances](http://energy.ca.gov/appliances) or call **1-800-772-3300**.

### BETTER BUSINESS BUREAU (BBB)

Please visit [bbb.org](http://bbb.org) or consult your phone directory for the phone number and location of your local BBB.

### CONTRACTORS STATE LICENSE BOARD (CSLB)

California State law requires that a licensed contractor providing home improvement services greater than \$500 must provide the customer with a Home Improvement Contract (HIC). You may wish to confirm your contractor's license status at the CSBL by calling **1-800-321-CSLB** (2752) or accessing their website:

- Visit [cslb.ca.gov](http://cslb.ca.gov)
- Click on license status-check icon
- Type in six-digit license number for verification
- Confirm active status of license under license status

**Confirm that contractor holds the appropriate license under the applicable classification heading.**

### PROGRAM USE ONLY SECTION

ICF Project Number \_\_\_\_\_

Date Entered into EECF \_\_\_\_\_

Property qualifies as DAC/HTR?  Yes  No