

# BayREN Home+ Data Collection Form

(to be entered in online Portal)

## Notes:

1. Most measures include pre-project and post-project inputs. This may require you to capture information about existing equipment and home conditions. Please be advised.
2. BayREN is required to collect the square footage of the home both pre- and post-project.
3. In addition to this form, remember a signed and completed reservation form is required to enter a project in the online Portal.

## Customer & Pre-Project information

Field Name	Field Description	Field Entry
PG&E account	PG&E account number Electrical SAID Gas SAID	
*Where do you want to send this rebate?	Input Payee for Rebate. Options may include: Trade ally address (Contractor, W9 Required and Portal activation) Service address (PG&E Customer) Other – ONLY for alternate customer mailing address, or other Payee (spouse, home owner, etc). Non-spouse payees require W9.	
*Customer Phone number	Input Customer's phone number	
*Customer Email address	Input Customer's email address	
*Year home built	Input year home built	
*Pre-Project Home Square Feet	Input the existing square footage (pre-project) of the home	



## Operations and Maintenance Measures

**Measure Name:** Smart Thermostat (must be listed on the ENERGY STAR qualified product list for Smart Communicating Thermostat)

**Measure Rebate Amount:** \$150

**Pre-Project Inputs:** See above:



**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
*Manufacturer	Input Smart Thermostat Make (i.e. 'Nest', 'Ecobee', 'Honeywell', etc.)	
*Manufacturer/Model	Input Smart Thermostat Model #	
*Date Installed	Input installation date	
*Measure Cost	Input Customer cost for the measure	
*Replaced Thermostat Type	Input the type of the thermostat replaced from these options	Manual T-Stat Programmable T-stat, programmed Programmable T-stat, not programmed
*New Thermostat Systems Serviced	Input the systems the Smart Thermostat serves from these options	Central Heating & A/C Central Heating Heat Pump Ductless Heat pump
CAS Test-Out Result	Input results of combustion safety test	Pass Fail Pass With Recommendations
CAS Notes:	Input notes from combustion safety test	
*Post-Project Home Square Feet	Input the post-project square footage of the home	
*Attachments	Attach the following items (minimum): 1. Itemized "PAID" Invoice 2. Signed Application Form 3. BayREN CAS Grading Sheet	

Secondary Project Notification Recipient?	Input Secondary contractor or rater email contact for notifications	
*How did your customer hear about this program?	Input the source for the customer finding out about the BayREN Home+ Program from these selections	PG&E Local Government Community Event Email or Newsletter Facebook or Twitter Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:	Input the type of home from these selections	Single Family Detached 2-4 Units

**Measure Name:** Duct Sealing  $\leq 10\%$  total leakage (Any Ductwork or Furnace/FAU/Air Handler located in garage disqualifies Measure)

**Measure Rebate Amount:** \$200

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
*Date Installed	Input installation date	
*Measure Cost	Input Customer cost for the measure	
*Post-retrofit CFM25	Input the CFM25 reading from the post-project duct leakage test. (For homes with two duct systems, please enter values for the larger of the two systems)	
*Post-retrofit Duct Leakage Calculation Method	Input the type of duct leakage test performed from these options	Leakage To Outside Total Leakage
*Does this customer have a cooling system?	Input whether there is a central cooling system in the home	Yes No
Cooling System Size (in Tons)	Input the Cooling system size in Tons (if any)	
*Heating System Size (kBTU):	Input the heating system size (input) in kBTUs	
CAS Test-Out Result	Input results of combustion safety test	Pass Fail Pass With Recommendations
CAS Notes:	Input notes from combustion safety test	
*Post-Project Home Square Feet	Input the post-project square footage of the home	

*Attachments	Attach the following items (minimum): 1. Itemized Invoice 2. Signed Application Form 3. CAS Grading Sheet 4. CFM25 Manometer Photo	
Secondary Project Notification Recipient?	Input Secondary contractor or rater email contact for notifications	
*How did your customer hear about this program?	Input the source for the customer finding out about the BayREN Home+ Program from these options	PG&E Local Government Community Event Email or Newsletter Facebook or Twitter Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:	Input the type of home from these options	Single Family Detached 2-4 Units

**Measure Name:** Duct Replacement ≤ 5% total leakage

**Measure Rebate Amount:** \$800

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
*Date Installed	Input installation date	
*Measure Cost	Input Customer cost for the measure	
*Post-retrofit CFM25	Input the CFM25 reading from the post-project duct leakage test. (For homes with two duct systems, please enter values for the larger of the two systems)	
*Post-retrofit Duct Leakage Calculation Method	Input the type of duct leakage test performed from these options	Leakage To Outside Total Leakage
*Does this customer have a cooling system?	Input whether there is a central cooling system in the home	Yes No
Cooling System Size (in Tons)	Input the Cooling system size in Tons (if any)	
*Heating System Size (kBTU):	Input the heating system size (input) in kBTUs	
CAS Test-Out Result	Input results of combustion safety test	Pass Fail Pass With Recommendations
CAS Notes:	Input notes from combustion safety test	
*Post-Project Home Square Feet	Input the post-project square footage of the home	

*Attachments	Attach the following items (minimum): 1. Itemized Invoice 2. Signed Application Form 3. CAS Grading Sheet 4. CFM25 Manometer Photo	
Secondary Project Notification Recipient?	Input Secondary contractor or rater email contact for notifications	
*How did your customer hear about this program?	Input the source for the customer finding out about the BayREN Home+ Program from these options	PG&E Local Government Community Event Email or Newsletter Facebook or Twitter Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:	Input the type of home from these options	Single Family Detached 2-4 Units

## Building Shell Measures

**Measure Name:** Attic insulation  $\geq$  R-44 (includes attic air sealing)


**Measure Rebate Amount:** \$0.75 / ft<sup>2</sup> (not to exceed \$1,000 per home)

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
*Date Installed	Input installation date	
*Existing Insulation Type	Input the type of pre-existing insulation prior to project completion from these options (select 'Other' if none)	Fiberglass batts Loose fill cellulose Loose fill fiberglass Other
*Existing Insulation R-Value Installed	Input the R-value of the pre-existing insulation prior to project completion	
*Attic insulation Type Installed	Input the type of attic insulation installed from these options	Fiberglass batts Loose fill cellulose Loose fill fiberglass Polyisocyanurate Other
*Measure Cost	Input Customer cost for the measure	
*Attic Insulation R-Value Installed	Input the post-project attic insulation R-value	
*Attic Insulation Square Footage Installed	Input the square footage of attic insulation installed (not including knee-walls)	
CAS Test-Out Result	Input results of combustion safety test	Pass Fail Pass With Recommendations
CAS Notes:	Input notes from combustion safety test	
*Post-Project Home Square Feet	Input the post-project square footage of the home	
*Attachments	Attach the following items (minimum): 1. Itemized Invoice 2. Signed Application Form	



	3. CAS Grading Sheet	
Secondary Project Notification Recipient?	Input Secondary contractor or rater email contact for notifications	
*How did your customer hear about this program? 	Input the source for the customer finding out about the BayREN Home+ Program from these options	PG&E Local Government Community Event Email or Newsletter Facebook or Twitter Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:	Input the type of home from these options	Single Family Detached 2-4 Units



**Measure Name:** Wall insulation  $\geq$  R-13 (2x4 framing) or  $\geq$  R-19 (2x6 framing)

**Measure Rebate Amount:** \$0.70 / ft<sup>2</sup> (not to exceed \$1,000 per home)

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
Date Installed	Input installation date	
*Measure Cost	Input Customer cost for the measure	
*Wall insulation Type Installed	Input the type of wall insulation installed from these options	Dense-pack cellulose Dense-pack fiberglass Blown-in blanket cellulose Blown-in blanket fiberglass Other
*Wall Insulation R-Value Installed	Input the post-project wall insulation R-value	
*Wall Insulation Square Footage Installed	Input the square footage of wall insulation installed (not attic knee-walls)	
CAS Test-Out Result	Input results of combustion safety test	Pass Fail Pass With Recommendations
CAS Notes:	Input notes from combustion safety test	
*Post-Project Home Square Feet	Input the post-project square footage of the home	
*Attachments	Attach the following items (minimum): 1. Itemized Invoice 2. Signed Application Form 3. CAS Grading Sheet	
Secondary Project Notification Recipient?	Input Secondary contractor or rater email contact for notifications	
*How did your customer hear about this program?	Input the source for the customer finding out about the BayREN Home+ Program from these options	PG&E Local Government Community Event Email or Newsletter

		Facebook or Twitter Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:	Input the type of home from these options	Single Family Detached 2-4 Units

## Heating and Cooling Measures

**Measure Name:** High efficiency central gas furnace  $\geq$  95% AFUE (must replace existing central gas furnace)

**Measure Rebate Amount:** \$300

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
AHRI Number	Optional entry to input AHRI instead of Manufacturer/Model#	
*Manufacturer	Input the post-project heating system make installed (i.e. Trane, Lennox, etc.)	
*Model #	Input the post-project heating system model # installed	
*Date Installed	Input installation date	
*Measure Cost	Input Customer cost for the measure	
*Existing Heating System Type	Input the pre-project heating system type from these options	Central Split System Central Packaged System
*Existing Heating System Fuel Type	Input the fuel type of the existing heating system	Natural Gas
*Existing Heating System <u>Input</u> BTU	Input the pre-project heating system size ( <u>input</u> ) kBTUs	
New Heating System Fuel Type	Input the fuel type of the installed new heating system	Natural Gas
* <u>New Heating System Size</u> (Input in kBTU)	Input the post-project heating system size ( <u>input</u> ) kBTUs	
* <u>New Heating System Size</u> (Output in kBTU)	Input the post-project heating system size ( <u>output</u> ) kBTUs	
*Furnace AFUE Rating	Input the post-project furnace AFUE rating	

CAS Test-Out Result	Input results of combustion safety test	Pass Fail Pass With Recommendations
CAS Notes:	Input notes from combustion safety test	
*Post-Project Home Square Feet	Input the post-project square footage of the home	
*Downsize Bonus Eligible?	Input whether this measure meets the requirements for the BayREN Home+ equipment downsizing bonus rebate of \$100 or not For a furnace, the downsize will be based on the new system size input being at least 12 kBTU less than the existing system. Please note additional photo documentation is required.	Yes No
*HVAC / Building Shell Bonus Eligible?	Input whether or not this measure meets the requirements for the HVAC / Building Shell bonus rebate .	Yes No
Original Application Confirmation Number:	Input the application number for Attic or wall insulation project. In order to receive the HVAC / Building Shell bonus rebate please provide the BayREN Home+ Rebate Application # for the wall or attic insulation measure associated with this HVAC measure. If you haven't yet submitted your building shell measure and are applying for this bonus please submit your building shell measure before continuing	
*Attachments	Attach the following items (minimum): 1. Itemized Invoice 2. Signed Application Form 3. CAS Grading Sheet 4. Pre-and post-project equipment nameplate photos (if select downsize bonus)	

Secondary Project Notification Recipient?	Input Secondary contractor or rater email contact for notifications	
*How did your customer hear about this program?	Input the source for the customer finding out about the BayREN Home+ Program from these options	PG&E Local Government Community Event Email or Newsletter Facebook or Twitter Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:	Input the type of home from these options	Single Family Detached 2-4 Units

**Measure Name:** High efficiency central air conditioner  $\geq$  17 SEER (must replace existing central air conditioner)

**Measure Rebate Amount:** \$800

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
AHRI Number	Optional entry to input AHRI instead of Manufacturer/Model#	
*Outdoor Condenser Manufacturer:	Input the post-project cooling system make installed (i.e. Lennox, Carrier, etc.)	
*Outdoor Condenser Model #:	Input the post-project cooling system condenser model # installed	
*Date Installed	Input installation date	
*Measure Cost	Input Customer cost for the measure	
*Existing Cooling System Type	Input the pre-project cooling system type from these options	Central Split System Central Packaged System
*Existing Cooling System Size (in Tons)	Input the pre-project cooling system size in Tons	
* New Cooling System Type	Input the post-project cooling system type installed from these options	Central Split System Central Packaged System
*New Cooling System Size (in Tons)	Input the post-project cooling system installed size in Tons	
*Post-Project Home Square Feet	Input the post-project square footage of the home	
CAS Test-Out Result	Input results of combustion safety test	Pass Fail Pass With Recommendations
CAS Notes:	Input notes from combustion safety test	

*Equipment Downsizing Bonus?	Input whether or not this measure meets the requirements for the BayREN Home+ equipment downsizing bonus rebate of \$100. For an Air Conditioner, the downsize will be based on the new system size input being at least 1 Ton (12kBTU) less than the existing system. Please note additional photo documentation is required.	Yes No
*HVAC / Building Shell Bonus Eligible?	Input whether or not this measure meets the requirements for the HVAC / Building Shell bonus rebate	Yes No
Original Application Confirmation Number:	Input the application number for Attic or wall insulation project. In order to receive the HVAC / Building Shell bonus rebate please provide the BayREN Home+ Rebate Application # for the wall or attic insulation measure associated with this HVAC measure. If you haven't yet submitted your building shell measure and are applying for this bonus please submit your building shell measure before continuing.	
*Attachments	Attach the following items (minimum): 1. Itemized Invoice 2. Signed Application Form 3. CAS Grading Sheet 4. Proof of existing AC 5. Proof of permit closure 6. Pre-and post-project equipment nameplate photos (if select downsize bonus)	
Secondary Project Notification Recipient?	Input Secondary contractor or rater email contact for notifications	
*How did your customer hear about this program?	Input the source for the customer finding out about the BayREN Home+ Program from these options	PG&E Local Government Community Event Email or Newsletter Facebook or Twitter



		Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:	Input the type of home from these options	Single Family Detached 2-4 Units

**Measure Name:** High efficiency heat pump  $\geq$  17 SEER / 9.4 HSPF (must replace entire load associated with existing electric heating system or heat pump)

**Measure Rebate Amount:** \$1,000

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
AHRI Number	Optional entry to input AHRI instead of Manufacturer/Model#	
*Manufacturer	Input the post-project heat pump system make installed (i.e. York, Trane, Rheem, etc.)	
*Model #	Input the post-project heat pump system installed model #	
*Date Installed	Input installation date	
*Measure Cost	Input Customer cost for the measure	
*Existing Heating System Size (input in kBTU):	Input the pre-project heat pump system size in kBTUs	
*New Heat Pump Size (in kBTU):	Input the post-project heat pump system size in kBTUs	
*New Heat Pump System Type:	Input the post-project heat pump system type installed from these options	None Central Split System Central Packaged System
*SEER Rating	Input the post-project installed heat pump system SEER rating as shown on the AHRI certificate	
*HSPF Rating	Input the post-project installed heat pump system HSPF rating as shown on the AHRI certificate	
*Post-Project Home Square Feet	Input the post-project square footage of the home	
CAS Test-Out Result	Input results of combustion safety test	Pass Fail Pass With Recommendations

CAS Notes:	Input notes from combustion safety test	
*Downsize Bonus Eligible?	Input whether or not this measure meets the requirements for the BayREN Home+ equipment downsizing bonus rebate of \$100. For a Heat Pump, the downsize will be based on the new system size input being at least 12 kBTU less than the existing system. Please note additional photo documentation is required.	Yes No
*HVAC / Building Shell Bonus Eligible?	Input whether or not this measure meets the requirements for the HVAC / Building Shell bonus rebate	Yes No
Original Application Confirmation Number:	Input the application number for Attic or wall insulation project. In order to receive the HVAC / Building Shell bonus rebate please provide the BayREN Home+ Rebate Application # for the wall or attic insulation measure associated with this HVAC measure. If you haven't yet submitted your building shell measure and are applying for this bonus please submit your building shell measure before continuing.	
*Attachments	Attach the following items (minimum): 1. Itemized Invoice 2. Signed Application Form 3. CAS Grading Sheet 4. Proof of existing AC (if applicable) 5. Proof of permit closure (if applicable) 6. Pre-and post-project equipment nameplate photos (if select downsize bonus)	
Secondary Project Notification Recipient?	Input Secondary contractor or rater email contact for notifications	

*How did your customer hear about this program?	Input the source for the customer finding out about the BayREN Home+ Program from these options	PG&E Local Government Community Event Email or Newsletter Facebook or Twitter Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:	Input the type of home from these options	Single Family Detached 2-4 Units

# Water Heating Measures

**Measure Name:** High efficiency gas water heater  $\geq 0.70$  EF (must replace existing gas water heater)

**Measure Rebate Amount:** \$400

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
AHRI Number	Optional entry to input AHRI instead of Manufacturer/Model#	
* Manufacturer	Input the post-project water heater make installed (i.e. Rheem, etc.)	
*Model #	Input the post-project water heater model # installed	
*Date Installed	Input installation date	
*Measure Cost	Enter Customer cost for the measure	
*Existing Water Heater System Type	Input the pre-project water heater system type from these options	Tank Tankless Water Heater
*New Water Heater Input kBTU	Input the post-project input kBTUs for the water heater	
*New Water Heater Type:	Input the post-project water heater system type installed from these options	Tank Tankless Water Heater
*New Water Heater Fuel Type	Input the post-retrofit water heater fuel type	Natural Gas
*Energy Factor (EF)	Input the post-project water heater installed Energy Factor as shown on the AHRI certificate	
New Water Heater Tank Size	Input the post-project water heater installed size in Gallons	
*Post-Project Home Square Feet	Input the post-project square footage (pre-project) of the home	

CAS Test-Out Result	Input results of combustion safety test	Pass Fail Pass With Recommendations
CAS Notes:	Input notes from combustion safety test	
*Attachments	Attach the following items (minimum): 1. Itemized Paid Invoice 2. Signed Application Form 3. CAS Grading Sheet	
Secondary Project Notification Recipient?	Input Secondary contractor or rater email contact for notifications	
*How did your customer hear about this program?	Input the source for the customer finding out about the BayREN Home+ Program from these options	PG&E Local Government Community Event Email or Newsletter Facebook or Twitter Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:	Input the type of home from these options	Single Family Detached 2-4 Units

**Measure Name:** Heat pump water heater  $\geq$  3.24 EF (must replace existing electric or heat pump water heater)

**Measure Rebate Amount:** \$1,200

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
AHRI Number	Optional entry to input AHRI instead of Manufacturer/Model#	
* Manufacturer	Input the post-project water heater make installed (i.e. Rheem, etc.)	
*Model #	Input the post-project water heater model # installed	
*Date Installed	Input installation date	
*Measure Cost	Input Customer cost for the measure	
*Existing Water Heater Type	Input the pre-project water heater type from these options	Tank Tankless Water Heater
*Existing Water Heater Fuel Type	Input the pre-project water heater fuel type	Electric
*New Water Heater Type:	Input the post-project water heater system type installed from these options	Tank Tankless Water Heater
New Water Heater Tank Size	Input the post-project water heater installed size in Gallons	
*Energy Factor (EF)	Input the post-project water heater installed Energy Factor as shown on the AHRI certificate	
CAS Test out results	Input results of combustion safety test	Pass Fail Pass With Recommendations N/A
CAS notes	Input notes from combustion safety test	

*Post-Project Home Square Feet	Input the post-project square footage of the home	
*Attachments	Attach the following items (minimum): 1. Itemized Paid Invoice 2. Signed Application Form 3. CAS Grading Sheet	
Secondary Project Notification Recipient?	Input Secondary contractor or rater email contact for notifications	
*How did your customer hear about this program?	Input the source for the customer finding out about the BayREN Home+ Program from these options	PG&E Local Government Community Event Email or Newsletter Facebook or Twitter Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:	Input the type of home from these options	Single Family Detached 2-4 Units



## Bonus Measures

**Measure Name:** Combine one or more Building Shell measures with a Heating or Cooling measure

**Measure Rebate Amount:** \$500

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
*Building Shell measure(s)	Input the building shell measures completed	
*Heating or Cooling Measure(s)	Input the heating or cooling measures completed	

**Measure Name:** Combine attic and exterior wall insulation work.

**Measure Rebate Amount:** \$500

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
*Building Shell measure(s)	Input the building shell measures completed	

**Measure Name:** Combustion Appliance Safety (CAS) test-out

**Measure Rebate Amount:** \$150

**Pre-Project Inputs:** None

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
*CAS Test-Out Result	Input the results of the CAS test	Pass Fail Pass With Recommendations
CAS Notes	Input notes from combustion safety test	
*Attachments	Attach the following items (minimum): 1. Itemized Invoice 2. Signed Application Form 3. CAS Grading Sheet	





**Measure Name:** Building air sealing  $\geq$  30% total leakage reduction

**Measure Rebate Amount:** \$150

**Pre-Project Inputs:** See above:

**Post-Project Inputs:** See below:

Field Name	Field Description	Field Entry
*Date Installed 		
*Measure Cost	Enter Customer cost for the measure	
Blower Door Test In (Pre-CFM50)	Blower Door Test In (Pre-CFM50)	
*Blower Door Test Out (Post-CFM50)	Input the post-project blower door test result (CFM50)	
*Post-Project Building Leakage Test Method	Identify the building leakage test method used	Positive Pressure Negative Pressure
*Total Building Air Sealing Reduction	Enter the total % air sealing reduction as shown on the BayREN CAS Grading Sheet	
CAS Test-Out Result		Pass Fail Pass With Recommendations
CAS Notes:		
*Post-Project Home Square Feet	Input the post-project square footage (pre-project) of the home	
*Attachments	1. Itemized Paid Invoice 2. Signed Application Form 3. BayREN CAS Grading Sheet 4. Photo of date & time stamped Pre-CFM50 manometer reading (if applicable) 5. Photo of date & time stamped Post-CFM50 manometer reading	
Secondary Project	Secondary contractor or rater email contact	

Notification Recipient?		
*How did your customer hear about this program?  		PG&E Local Government Community Event Email or Newsletter Facebook or Twitter Direct Mail or Letter Internet ad or search engine Referral from friend or family member Referral from participating contractor Other
*Home Type:		Single Family Detached 2-4 Units

