



Completing the Job Reporting Template for SMUD Home Performance Program Contractors

Updated 2/24/2015

DOWNLOAD THE JOB REPORTING TEMPLATE

1. Go to <http://cbpca-hpp.org/library/#jobsubmissions>
2. Under *Job submission resources*, click on the Job Reporting Template (JRT) that is compatible with your version of Microsoft Excel.

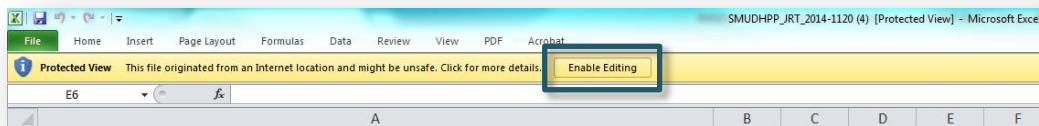
Job submission resources

- [Job Reporting Template \(.xlsx\)](#) (updated 1/13/15) [For Microsoft Excel 2007 & later]
- [Job Reporting Template \(.xls\)](#) (updated 1/13/15) [For Microsoft Excel 1997-2003]
- [Job Reporting Template instructions](#) (PDF) (added 1/29/15)
- [Vision database job submission instructions](#) (PDF) (updated 10/21/14)

3. Open the file to begin.

NAVIGATE THE JOB REPORTING TEMPLATE

4. Click *Enable Editing* to remove the Protected View format.



5. JRT tabs are as follows:
 - a. **HPP Info:** General instructions how to properly fill out the JRT, program administrator contact information, and hyperlinks
 - b. **Menu:** Descriptions, requirements, and rebate values for each upgrade measure
 - c. **JobInfo:** Project information including contractor, accountholder/property owner, utility service, house, and assessment information
 - d. **RebateApp:** Home performance program rebate application, instructions, terms and conditions
 - e. **T24Lighting:** Tables on classification of high efficacy light sources, and minimum requirements for other light sources to qualify as high efficacy

- f. **Savings:** Upgrade measure estimated savings

PRE-UPGRADE SUBMISSION

COMPLETE JOBINFO TAB

6. Click the *JobInfo* tab



7. Enter the following project information (see examples):

- a. Your company name

Contractor company	Bki
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- b. Contractor information (in the instance that the rebate will be paid to the contractor)

CONTRACTOR INFORMATION (fill out if the rebate will be assigned to contractor)	
Contractor company (as stated on rebate check)	Bki
Contractor street address	1000 Broadway Ste 410
Contractor city	Oakland
Contractor state	CA
Contractor ZIP	94607

- c. Accountholder/property owner information

ACCOUNTHOLDER/PROPERTY OWNER INFORMATION	
SMUD accountholder first name	Joe
SMUD accountholder last name	Smith
Accountholder street address (i.e., home upgraded)	1820 E Street
Accountholder city	Sacramento
Accountholder state	CA
Accountholder ZIP	95811
Accountholder email	Accountholder@gmail.com
Accountholder phone	(555)555-5555
Property owner first name	Joe
Property owner last name	Smith
Property owner mailing street address	1820 E Street
Property owner mailing city	Sacramento
Property owner mailing state	CA
Property owner mailing ZIP	95811
Property owner email	Propertyowner@gmail.com
Property owner phone	(555)555-5555
Payee (accountholder, property owner, or contractor)	Accountholder
Did the customer finance any portion of this project?	No
Does the job scope meets the minimum 10% kWh savings requirement?	No

- d. Utility Service information

UTILITY SERVICE INFORMATION	
Natural gas utility provider name	PG&E
Electricity utility provider name	SMUD
Electricity utility service account number	12345

NOTE: The electric utility service account number is required for all jobs submitted to the SMUD Home Performance Program.

- e. House Information

HOUSE INFORMATION	
Year home built	1980
Home type	Single-family detached
# bedrooms	2
# occupants	3
Total conditioned floor area (sq ft) (sum of all floors)	1732
Average ceiling height (ft) (Enter significant exceptions in NOTES)	8
# floors	1

8. For all jobs submitted the following information **must** be provided:

a. Assessment information

- i. Date of home performance assessment (mm/dd/yy)
- ii. Date work began/will begin (mm/dd/yy)
- iii. Work-hours for pre-upgrade home performance assessment
- iv. Total cost of pre-upgrade home performance assessment
- v. Cost of home performance measures (exclude non-energy efficiency measures) for proposed conditions
- vi. Job scope for proposed conditions. (The job scope will automatically be generated based on the upgrade measures selected in the *Menu* tab. List additional measures in the "Job Scope Notes" field.)
- vii. Job scope notes (list any additional measures that will be/have been installed for this upgrade project)

b. Attic insulation & attic floor seating

- i. Attic insulation type (select from drop down list)
- ii. Attic insulation R-value (to determine the effective R-value of attic insulation, measure the depth and specify the effective R-value according to BPI guidelines)
- iii. Insulation depth (in) (if none, enter 0)
- iv. Proposed improved attic insulation square footage
- v. Will existing insulation be re-used (Yes/No)
- vi. Does home have knee walls (Yes/No)
- vii. Knee wall insulation R-value, if applicable value (to determine the effective R-value of knee wall insulation, measure the depth and specify the effective R-value according to BPI guidelines)
- viii. Proposed improved knee wall square footage, if applicable

NOTE: Many cells contain a drop down list of values (e.g. attic insulation type). To activate this feature, click on a cell once, then click on the downward facing arrow that appears to the right of the cell.

NOTE: Homes that will have attic insulation work performed are required to upgrade to an R-value of 38 or greater (knee walls must be R-19 or greater). However, the requirement is exempt if existing insulation is R-30 or greater and free of contamination. If re-using existing attic insulation, remember to upload photos to Vision system along with the pre-upgrade submission.

NOTE: If a home has knee walls, be sure to measure the attic square footage and knee wall square footage directly. A home with knee walls typically has an attic square footage that does not equal the conditioned area square footage.

9. Enter the remaining house information **only** if it is related to measures that will be performed for this project:

NOTE: Enter data for both the pre-upgrade condition (if field is available) and the proposed home condition.

- a. Air sealing and mechanical ventilation
- b. Wall insulation
- c. Windows
 - i. Proposed/Post-upgrade U-factor must be less than or equal to 0.30.
 - ii. Proposed/Post-upgrade SHGC value must be less than or equal to 0.25.
- d. Crawlspace Insulation
 - i. Pre-crawlspace insulation must be R-0.
 - ii. Proposed/Post-upgrade crawlspace insulation must be R-19 or greater.
- e. HVAC
 - i. Under *Existing Conditions* (column B) enter HVAC system information.
 - ii. Under *Proposed Conditions* (Column C) enter information on the HVAC system to be installed.

NOTE: If the HVAC system to be installed will have a lower cooling capacity (tonnage), select the *Home Performance Program HVAC Bonus* on the *Menu* tab.

NOTE: If the home only has one HVAC system, leave fields for the second HVAC system blank.

Measure	Description	Requirements		Rebate	\$ earned
		Pre-upgrade	Post-upgrade		
HVAC MEASURES					
Replace HVAC	New or replacement electric HVAC system	-	Split central AC ≥ 14.5 SEER, ≥ 12 EER	\$500	
		-	Split central AC ≥ 15 SEER, ≥ 12.5 EER	\$650	
		-	Split central AC ≥ 16 SEER, ≥ 13 EER	\$850	
		-	Split central AC ≥ 14.5 EER	\$1,100	
		-	Split central AC ≥ 14.5 EER - Aqua Chill	\$2,000	
		-	Packaged central AC ≥ 14 SEER, ≥ 11 EER	\$500	
		-	Packaged central AC ≥ 14 SEER, ≥ 12 EER	\$650	
		-	Split heat pump ≥ 14.5 SEER, ≥ 12 EER, ≥ 8.5 HSPF	\$500	
		-	Split heat pump ≥ 15 SEER, ≥ 12.5 EER, ≥ 8.5 HSPF	\$650	
		-	Packaged heat pump ≥ 14 SEER, ≥ 11 EER, ≥ 8 HSPF	\$500	
		-	Packaged heat pump ≥ 14 SEER, ≥ 12 EER, ≥ 8 HSPF	\$650	
		-	Mini-split heat pump ≥ 15 SEER, ≥ 8.5 HSPF With DC inverter technology Enter # of indoor heads installed	\$250 per indoor head, \$1000 max	Post-upgrade condition: Is central AC system present and operational?

f. Duct seal or replacement

- i. If existing ducts will be replaced, the allowable SMUD HPP measured duct leakage to outside (CFM25) is 6% or less
- ii. If the existing ducts will not be replaced, the allowable SMUD HPP measured duct leakage to outside is 8% or less.

NOTE: Only use total *measured* air flow for duct replacement/sealing post upgrade conditions. SMUD HPP will not accept nominal measured air flow.

NOTE: If the home has only one duct system, leave fields for the second duct system blank.

NOTE: If any of the home’s ducts are inaccessible, indicate the percentage of existing ducts that are inaccessible and thus cannot be replaced/sealed in the “Notes” field on the *JobInfo* tab of the Job Reporting Template. The reviewers will use this information to calculate an “inaccessible ducts allowance” when evaluating whether the final duct leakage meets SMUD HPP guidelines. View the formula for the inaccessible duct allowance here: <http://cbpca-hpp.org/submit-jobs/job-submission-process/jrtreview/>

- g. Whole house fan
- h. Domestic hot water replacement
- i. Pool pump replacement

- j. Lighting fixture replacement
- k. Combustion appliances safety test results
- l. Notes
 - i. Please add notes either under the *Contractor comments* (column F) or in the *Notes* section (row 141).

SELECT REBATE MEASURES

10. Click the *Menu* tab



11. Select rebate measures that will be performed for this project by checking the corresponding boxes in column G.
- a. Review alerts that may appear under *Notes* (columns J and K).
 - b. Review *Pre-upgrade and Post-upgrade Requirements* (columns C and D) to ensure the qualifying measure is selected (e.g. rebates for upgraded HVAC systems will vary depending on SEER and EER requirements).

TIP: Cell background color for cells located in the *JobInfo* tab within columns B, C, and D will reformat to white when corresponding rebate measures are selected in the *Menu* tab (formatting may not function properly if you are using Excel 2007 or earlier).

REVIEW JOBINFO TAB

12. Return to the *JobInfo* tab



13. Review cells with reformatted white background color to confirm all requested information was entered. If not, enter missing information before submitting to the Vision system.

POST-UPGRADE SUBMISSION

SELECT REBATE MEASURES

14. Confirm that the measures selected on the *Menu* tab match the actual installed scope of work.

COMPLETE JOBINFO TAB

15. Complete steps 10 and 11 for all installed post-upgrade conditions.