



Comfortably CA

2023 Statewide Midstream HVAC Contractor Incentive Claim Form

Comfortably CA is a statewide energy efficiency program serving HVAC distributors and contractors with resources for high-efficiency commercial and residential heating and cooling equipment. Check with your distributors' territory manager or branch for a complete list of eligibility requirements. Program incentives are only available through a participating Comfortably CA distributor. Please return the completed form to your Comfortably CA Participating Distributor.

Project Information

Project Type: Commercial Residential

Equipment Type: (Submit ONE form per product)

- | | |
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| <input type="checkbox"/> Commercial Air-Cooled Air Conditioner* | <input type="checkbox"/> Commercial Air-Cooled Heat Pump* |
| <input type="checkbox"/> Commercial Multi-Capacity Unitary Air-Cooled Air Conditioner* | <input type="checkbox"/> Commercial Heat Pump Air Conditioner (FUEL SUBSTITUTION)* |
| <input type="checkbox"/> Commercial Hot Water Boiler (SPACE HEATING ONLY) | <input type="checkbox"/> Commercial Steam Boiler (SPACE HEATING ONLY) |
| <input type="checkbox"/> Commercial Air-Cooled Constant Speed Screw Chiller | <input type="checkbox"/> Commercial Air-Cooled Variable Speed Screw Chiller |
| <input type="checkbox"/> Commercial Packaged Air Conditioner Heat Recovery (Fast Food Rest.) | <input type="checkbox"/> Commercial Software Controlled Switch Reluctance Motor |
| <input type="checkbox"/> HVAC Occupancy Sensor (Classroom) | <input type="checkbox"/> Residential High Efficiency Furnace w/ Variable Speed Motor |
| <input type="checkbox"/> Residential Gravity Wall Furnace | <input type="checkbox"/> Residential Heat Pump HVAC (FUEL SUBSTITUTION)* |

*Existing Equipment Type, Size (Btu), Provide New Equipment Size (Btu) required.

Building Type:

- | | | |
|--|---|---|
| <input type="checkbox"/> Assembly | <input type="checkbox"/> Hospital | <input type="checkbox"/> Retail-Multi-Story Large |
| <input type="checkbox"/> Commercial | <input type="checkbox"/> Hotel | <input type="checkbox"/> Retail-Large |
| <input type="checkbox"/> Education-Community College | <input type="checkbox"/> Motel | <input type="checkbox"/> Retail-Small |
| <input type="checkbox"/> Education-Primary School | <input type="checkbox"/> Nursing Home | <input type="checkbox"/> Storage-Conditioned |
| <input type="checkbox"/> Education-Relocatable Classroom | <input type="checkbox"/> Office-Large | <input type="checkbox"/> Warehouse-Refrigerated |
| <input type="checkbox"/> Education-Secondary School | <input type="checkbox"/> Office-Small | <input type="checkbox"/> Mobile Homes |
| <input type="checkbox"/> Education-University | <input type="checkbox"/> Restaurant-Fast Food | <input type="checkbox"/> Multi-Family |
| <input type="checkbox"/> Grocery | <input type="checkbox"/> Restaurant-Sit Down | <input type="checkbox"/> Single Family |

Equipment Information:

Existing Equipment Type*: <input type="checkbox"/> Air Conditioner <input type="checkbox"/> Heat Pump	Estimated Year Built: <input type="checkbox"/> <2002 <input type="checkbox"/> 2002-2016 <input type="checkbox"/> 2017-2022 <input type="checkbox"/> New Const
Existing Equipment Size (Btu)*: <input type="text"/>	Refrigerant Type: <input type="text"/>
New Equipment Size (Btu)*: <input type="text"/>	AHRI Number: <input type="text"/>
Model Number: <input type="text"/>	Serial Number: <input type="text"/>

*Existing Equipment Type, Size (Btu), Provide New Equipment Size (Btu) required for all AC/HP and Fuel Substitution measures.



Sales Information:

Distributor Invoice Number:	<input type="text"/>	Distributor Sales Date: (from Distributor Invoice)	<input type="text"/>
Installation Date:	<input type="text"/>		
End-Use Customer/Business Name:	<input type="text"/>		
End-Use Customer First/Last Name:	<input type="text"/>	Customer Phone:	<input type="text"/>
End-Use Customer Email:	<input type="text"/>		
End-Use Customer Address/City/Zip:	<input type="text"/>		

Contractor Information:

Contractor Business Name:	<input type="text"/>		
Contractor First/Last Name:	<input type="text"/>	Contractor Phone:	<input type="text"/>
Contractor Email:	<input type="text"/>		
Contractor Address/City/Zip:	<input type="text"/>		

Program Notification, Terms and Conditions:

Program Notification for Customers By purchasing a Measure under the program, the purchaser of such Measure agrees to the following terms and conditions: The purchaser acknowledges that the program is being funded by California utility ratepayers and administered by the IOUs under the auspices of the CPUC. SDG&E and the CPUC have the right to verify the purchase and/or installation of the applicable Measure, which verification may include conducting inspections at the site where the applicable Measure is installed and/or requesting that purchaser provide any available information, books and records related to the purchase or installation of the applicable Measure. The Measure must be installed no later than three (3) months following the date-of-purchase and shall remain installed for at least five (5) years. The purchaser consents that any information related to the purchaser's participation in the program, purchase of the Measure or use of the Measure may be shared with SDG&E, any IOU and the CPUC. A disclaimer of any responsibility of any IOU in connection with the selection, purchase, ownership and use of program Measures, and a release and indemnification of SDG&E and all IOUs from and against any claims, suits, proceedings, losses, liabilities, damages, costs, expenses, and fines arising from the purchase, ownership, installation, use, alteration, repair, replacement, or maintenance of any program Measure; and The purchaser will not receive any discounts, incentives, or incentives from another governmental, utility, public agency, or IOU program funded in whole or in part by IOU Customers for the same program Measures.

The Comfortably CA Program is funded by California utility customers under the auspices of the California Public Utilities Commission and implemented by CLEAResult under a contract awarded by San Diego Gas & Electric Company (SDG&E®). Customers who choose to participate in this program are not obligated to purchase any additional services offered by the contractor. The trademarks used herein are the property of their respective owners. This program is offered on a first-come, first-served basis and is effective until funding is expended, or the program is discontinued by the CPUC. Program may be modified or terminated without prior notice.

Questions:

Please contact your Distributor's Territory Manager.

Learn more about
Comfortably CA here:

