

Single Family Quality HVAC Program Rules and Participation Guide

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1. Definitions

Claim: A record of service information within **Iris** provided to the **program team** by the **participant** for consideration of an **incentive** payment.

Comprehensive Checklist: A list of tasks that are required to be conducted and documented when performing **QHVAC services** for any **service category**.

Customer: an individual who solicits HVAC services from the **participant**.

Feedback Error: A critical mistake in the work performed and/or reported.

Feedback Warning: A minor mistake in the work performed and/or reported.

Household Decision Maker: an individual who is authorized to make decisions for the site that a **QHVAC Service** is being performed on.

Incentive: A financial payment made to the **Participant** by the program.

Investor-Owned Utility (IOU): Pacific Gas & Electric (PG&E), Southern California Edison (SCE), Southern California Gas (SCG), or San Diego Gas & Electric (SDG&E).

Iris: The digital platform utilized to collect and store project data submitted by a **participant** for consideration of **incentive** payments made by the **Program**.

Load Calculation: a method of determining the heat gain and loss of a home or building so that HVAC equipment is properly sized.

Participant: A properly licensed individual or contracting entity that has successfully enrolled in and that remains in good standing with the **Program** following agreement to the terms outlined within the **Trade Professional Participation Agreement** (TPPA).

Program: The Quality Residential HVAC Services **Program**.

Program Funds: The remaining dollar amount the **program** has available to finance **incentives**

Program Team: The administrators, implementors, and affiliated partner organizations supporting the operations of the **program**.

Provisional Status: The entry level status that every contractor begins at for each **Service Category**.

QHVAC Service: A set of tasks performed and documented on a QHVAC checklist by a **participant** to an eligible household that abide by **program** guidelines.

Service Category: The class of service that is be provided through the **Program**.

Single Family Household: A residential property with a maximum of five dwelling units.

Talent LMS (Learning Management System): The Digital Platform that hosts Quality HVAC Trainings.

Tier I Services: Baseline **service categories** that consist of standard checklists and procedures

Tier II Services: Advanced **service categories** that consist of more in-depth checklists and procedures.

Trade Professional Participation Agreement: The legal document that outlines **program** terms and conditions that must be accepted upon enrollment.

2. Program

The **Program** provides multi-tiered **incentives** to California contractors dedicated to quality installation, maintenance, and advancing energy efficient technologies.

The **Program** encourages contractors to get ahead of market shifts and become recognized as champions of the HVAC industry. They will learn new skills and showcase services, demonstrating superior value to **customers**.

The **Program** is funded by California ratepayers and taxpayers under the auspices of the California Public Utilities Commission (“CPUC”) and administered by Frontier Energy, Inc. under a contract with San Diego Gas & Electric Company (“SDG&E”)

3. Participant Responsibilities

The **participant** is responsible for:

1. Reviewing, understanding, and abiding by the **Program** rules described within this document.
2. Completing all training items, participation agreements, and other related items required for enrollment and ongoing participation in the **Program** as communicated by the **program team**.
3. Monitoring changes to the **Program** and its requirements as communicated by the **program team** via newsletters, email correspondence, and other publications or outreach campaigns.
4. Communicating results of any **QHVAC Service** to a **household decision maker** and collecting his/her signature on the **comprehensive checklist** or acknowledgement form.
5. Monitoring the availability of **Program Funds** via:
 - a. The **Incentive** Budget Report provided on the [QHVAC Incentives Page](#).
 - b. Newsletters, emails, and other publications or correspondence provided by the **program team**.
6. Ensuring that the amount of **incentives** claimed does not surpass any limitations set by the **Program team**.

4. Eligibility

Participant/Contractor

- Must have an active C-20 CSLB license in good standing to enroll.
- Individual participating technicians must complete the relevant technical training on **Talent LMS** before providing **QHVAC Services** to become an eligible technician.

Customer

- Must receive gas or electric service from an **IOU** where the **QHVAC Service** is performed.

Site

- Must be a **single-family household**.

5. Enrollment

Enrollment consists of three requirements.

1. The **Participant** submits an [Enrollment Form](#) found on the [QHVAC Home Page](#). The enrollment form includes the **Trade Professional Participation Agreement**.
2. The **Participant** must complete the “Enrollment Training” in the [QHVAC training website \(Talent LMS\)](#).
3. The **Participant** must complete the [Quality HVAC Personnel Survey](#).

When the enrollment requirements are met, an [Iris Portal Login](#) will be created by the **Program Team** and the **participant** will receive an email when it is ready.

6. Completing services

To provide a **QHVAC Service**, an eligible technician that has completed the respective training on **Talent LMS** must perform the tasks indicated on the appropriate QHVAC **Comprehensive Checklist** and document the results. Once all tasks are performed, and the **participant** reviews findings with the **household decision maker**, the **participant** must obtain a signature from the **household decision maker**.

All checklists can be found on the [Participating Contractor Resources](#) page. Required tasks per **Service Category** and tier can be seen in the [Participation Tier Differences](#) table. If checklists receive an update, the **program team** will send an email alert to the listed QHVAC Primary Contact.

All tasks on the **Comprehensive Checklist** must be performed. If a task is not performed, adequate reasoning must be provided in the comments as to why the task was not performed. Reasoning will be determined adequate at the program team's discretion.

7. Load Calculations

Load calculations are required for five of the eight **QHVAC Services** to be eligible for **incentive**. Review [When to Use Full vs. Simplified load calculations](#), [accepted load calculation software](#), and the [Simplifications Allowed for Load Calculations](#) to ensure that your **load calculations** are acceptable by the **Program**.

The **participant** may perform the **load calculations** to enhance expertise, but the use of third-party companies to complete load calculations is acceptable.

8. Claim submission

All **claims** must be submitted through **Iris** portal to be eligible for **incentives**. Once the **QHVAC Service** is performed and all [required documents](#) are gathered, a **claim** may be submitted. Click here to view the steps to [submitting a claim](#)

Depending on which **Service Category** is performed, there are different images required as part of each respective checklist. The different required images can be found here: [Quality HVAC: Documents Required to Submit a Claim](#)

9. Payment and processing

Processing begins when the **claim** is submitted.

- If there are incorrect documents submitted or missing information in the documents, the **participant** will be alerted, and processing will restart when the **participant** resubmits the **claim**.

- If all correct documents are submitted without missing information, **Iris** will display “Approved.” “Approved” does not mean that the **claim** is approved for payment, but rather that all correct documentation was uploaded.

After the **claim** receives the **Iris** approval, if the **claim** requires technical review:

- It will then move to the review queue, and you will receive feedback. Once the review is complete, the feedback file will be sent to the Primary QHVAC Contact on file with the next steps.
- Once the feedback file is sent, payment will follow for claims that meet the criteria in section 10.

If **claims** are not selected for review, the **claims** will not receive feedback and will get paid.

Review the [Provisional Contractor Claim Submissions](#) article to learn which **claims** get reviewed.

10. Rules

1. Provisional status:

- a. All **Participants** must begin with **Tier I services** upon enrollment into the **program** before providing **Tier II services**.
- b. **Participant** must submit a batch of 5 **claims** and receive approval from the **Program Team** through email for each **QHVAC service** that they plan to provide before being eligible to submit additional **claims**.
 - a. While waiting for feedback on the initial five **claims**, the **participant** is not allowed to provide **QHVAC services** of the same **service category** or submit any **claims** of the same **service category** until the feedback file with next steps is received through email. Any **claims** of the same **service category** with a service date or submission date before the feedback file sent date will not be eligible for **incentive**.
 - c. **Incentive** payment or nonpayment on a batch of five reviewed **claims** will be decided as such:
 - a. If a batch of five **claims** does not contain any **feedback errors**, the **participant** will receive payment, and the **participant** may perform additional **QHVAC services** for that **service category** as indicated by the feedback file.
 - b. The first five **claim** submissions for each **service category** will be paid even if they contained **feedback errors**.
 - c. Following the first batch of five **claims**, only **claims** found to contain no **feedback errors** will be eligible for **incentive**.
 - d. If the batch of five contains **feedback warnings**, it will not disqualify the **claims** from **incentives** or moving forward with the **provisional status** but will alert the **participant** to change the way something was performed for future reference. At the **program team's** discretion, if the same **feedback warning** is noted multiple times after receiving feedback, it may lead to nonpayment for future **claims**.

2. **Service category** limitations: There is a limit of 2 service categories per household. The only allowable **QHVAC service** combinations are:
 - a. A Quality Installation on the same date or after a Quality Bid.
 - a. A Quality Installation can be performed without a prior Quality Bid.
 - b. A Quality Bid cannot be performed after a Quality Installation has already occurred.
 - c. A Quality Bid can be performed only one time per household
 - d. A Quality Installation can be performed only one time per household.
 - b. Quality Maintenance Calls with Quality Maintenance Setups. The order does not matter, but these must be spaced six months apart.
 - a. A Quality Maintenance Setup can only be performed only one time per household.
 - c. Quality Maintenance Calls with Quality Maintenance Calls. Must be spaced six months apart.
3. A participating technician may not provide a **QHVAC Service** to his/her household. However, technicians are allowed to provide **QHVAC services** to the households of different technicians as long as the individual performing the service is not a resident or owner of the household.
4. If a **participant** provides a **load calculation** with full inputs for a Quality Bid Service that results in an install, the **participant** does not have to do the **load calculation** again for the Quality Installation Service. If the **participant** used simplified inputs during the Quality Bid Service, the **participant** must use full inputs for the Quality Installation Service to be eligible for **incentive**.
5. Every **Claim** must be unique and will be rejected if it is a duplicate of a previously approved or paid **claim**.
6. If a **claim** was previously rejected, it may not be resubmitted. Resubmission of a previous **claim** will result in nonpayment.
7. A **claim** that includes information judged by the **program team** to be intentionally falsified or fraudulent will be rejected and will serve as grounds for the **participant's** temporary suspension or permanent termination from the **Program** at the discretion of the **program team**.
8. Any **claim** with service date after the **claim** creation date will be subject to nonpayment. All **claims** must be created after the **QHVAC service** is provided.
9. Any **QHVAC Service** performed by a technician without completing the relevant technical training in **Talent LMS** before providing the **QHVAC Service** will be subject to nonpayment.
10. Any **claims** found to have incorrect or outdated documents will be subject to nonpayment.
11. Any submitted **claims** that need corrections and are unaddressed for longer than 120 days will be rejected.
12. Any Quality Bids or Quality Installations **claims** to existing systems that are less than five years old will be rejected upon the technical team's discretion.
13. Quality Bids tier I and Tier II services must be performed for an existing system that is more than five years old. Quality Bid claims that aim to replace systems that are less than 5 years old will not be eligible for payment.

14. Any utility bills submitted with a claim that are older than 6 months from the service date will not be accepted by the program and the claim will be rejected.
15. Any claim that is found to have no activity in more than 120 days will be rejected.
16. The name on the utility bill does not need to match the name on the checklist. However, the addresses provided must match in all locations.
17. If the signature provided does not match the customer's name provided at the top of the paper checklist, there must be a note that explains the reasoning. Otherwise, it will not be accepted.
18. All claims must be submitted no more than 60 days after the date of service.
19. If processors require additional information or corrections to claims, all corrections must be provided no more than 120 days after the date of service.

11. Questions?

The **Program** has a [Knowledge Base](#) to address common questions and provide **Program** information. If there are still unanswered questions, feel free to reach out to the **Program Team** via email at qualityhvac@frontiereenergy.com or by phone at (833) 775-4516.

*The Quality Residential HVAC Services **Program** is funded by California utility **customers** under the auspices of the California Public Utilities Commission and implemented by Frontier Energy 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. Actual savings may vary. The trademarks used herein are the property of their respective owners.*