



COMPREHENSIVE AUDIT PROGRAM ONLINE APPLICATION USER GUIDE

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Comprehensive Audit Program

Online Application User Guide

Step 1 - Getting Started

This guide will walk you through the *Commercial Customer Comprehensive Audit Program Online Application*. The example shown in the following pages display the steps to apply for a High Level Audit (Category 1).

1. Indicate who is completing application - Select **Customer**
2. Enter active, valid, **10 digit SDG&E primary account number** for application. Additional utility account numbers (if applicable) will be entered in Step 2.
3. Enter **Street Number of primary account number** (note: street **NUMBER only, do not** enter street name)
4. Enter **ZIP code of primary account** (city will populate automatically)

Step 1: Getting Started

Commercial Business Comprehensive Audit Program

A one-stop solution for energy insight and savings

A smart approach to energy management begins with a comprehensive energy analysis. SDG&E's Comprehensive Audit Program is a great place to start.

Available to businesses that:

- Have monthly on-peak demand of 100 kilowatts (kW) or greater for three consecutive months
- Are billed on a commercial, industrial, or agricultural Time-of-Use rate with SDG&E
- Have occupied the premise for a minimum of 6 months

SDG&E's Comprehensive Audit Program is your solution for strategic energy analysis as it will deliver valuable insights about your electric use and savings tailored to your business. You'll be able to tap into an array of energy management services from one central source and eliminate the challenge of having to determine what program is most suitable for your business.

[Comprehensive Audit Program Details](#)

Indicate who is completing this application:

Account Holder

Account Information

| | |
|--------------------|------------|
| Account Number: | 9999999999 |
| Street Number: | 123 |
| ZIP / Postal Code: | 92123 |
| City: | San Diego |

Select responses below:

6. Click **Next**.

Does your account have monthly on-peak demand of 100 kilowatts (kW) or greater for three consecutive months?

Yes **1**

No

Is your account on a Time of Use (TOU) Rate?

Yes **2**

No

Has your business occupied the premise for a minimum of 6 months?

Yes **3**

No

Is your account a Commercial, Industrial or Agricultural?

Commercial

Industrial **4**

Agricultural

Are you applying for a high level audit or investment grade audit?

High-level Audit (Facility Walk-thru)

Detailed Investment-Grade Audit (Targeted) **5**

Note: Commercial, Industrial & Agricultural customers each have an online application link. Please select the appropriate link on the Comprehensive Audit Program (CAP) website.

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Step 2 - Customer Information

1. Enter **First Name** applicant
2. Enter **Last Name** of applicant
3. Enter **Email Address** of applicant

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Step 4: Review and Submit

Step 5: Confirmation & Next Steps

Customer Information

Account Number: 9999999999

Name on Account: Sports Supply, Inc

Primary Phone: (999) 999-9999

Alt Phone: (999) 999-9999

Fax:

Email:

Customer information section shown is populated by utility billing system.

Installation Address

Street: 123 Main Street

Unit:

ZIP / Postal Code: 92123

City: San Diego

State: CA

Contact Information

First Name: **1** **!**

Last Name: **2** **!**

Primary Phone: (999) 999-9999 **3** **!**

Alt Phone: (999) 999-9999

Fax:

Email: **!**

Edit phone number of applicant as needed

1. Is mailing address same as installation address? Select **Yes** or **No**
2. Is this a PO Box? Select **Yes** or **No**
3. Building Type - **Select from menu**
4. Occupancy Status - **Select from menu**
5. Additional Utility Accounts - **Enter if there are multiple account numbers included in the audit request (list any additional ten-digit, numeric)**
6. Year Built - **Enter year (example: 1950)**
7. Premise Square Footage - **Enter value**
8. Annual Operating Hours - **Enter value**
9. Major Consuming System or Equipment - **Enter (multiple options allowed)**
10. Click **Next**

The screenshot shows a web form with two main sections: 'Mailing Address' and 'Property Information'. The 'Mailing Address' section includes radio buttons for 'Is the mailing address the same as the installation address?' (1) and 'Is this a PO Box?' (2), followed by input fields for Country (3), Street (4), Unit (5), ZIP / Postal Code (6), City (7), and State (8). The 'Property Information' section includes dropdown menus for Building Type (9) and Occupancy Status (10), and input fields for Additional Utility Accounts (11), Year Built (12), Premise Square Footage (13), Annual Operating Hours (14), and Major Consuming System or Equipment (15). At the bottom right, there are '<< Back' and 'Next >>' buttons, with a red circle and the number 10 pointing to the 'Next >>' button.

Step 3 - Terms & Conditions

Review CAP Program Terms & Conditions

1. Check box indicating agreement with terms and conditions
2. Click **Next**

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Terms and Conditions

By checking below, you are acknowledging that you are an authorized representative of the customer identified in this application and are authorizing SDG&E to share the customer's utility consumption and billing information with the third party auditor that SDG&E assigned to your application.

I agree to the terms and conditions of this program

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Programs are funded by California utility customers and administered by SDG&E under the auspices of the California Public Utilities Commission. Further details about the Comprehensive Audit Program can be found at Comprehensive Audit Program.

Step 4 - Review & Submit

Review Application Information

1. Click **Submit**

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Please take a moment to review your application before you submit it to ensure that the information you have provided is true and correct.

Customer Information

Name on Account: Sports Supply, Inc
Primary Phone: (999) 999-9999
Alt Phone: (999) 999-9999

Installation Address

123 Main Street
San Diego, CA 92123

Contact Information

Applicant Name: test test
Phone: (999) 999-9999
Alt Phone: (999) 999-9999
Email: test@test.com

Mailing Address

123 Main Street
San Diego, CA 92123 US

Property Information

Building Type: Health/Medical - Clinics
Occupancy Status: Owner
Year Built: 1950
Premise Square Footage: 300000
Annual Operating Hours: 8760
Major Consuming System or Equipment: HVAC, Lighting, Processing, Other

<< Back Submit

Step 5 - Application Submitted - Confirmation

Review next steps and close web page. You will receive an email when your application has been reviewed by utility staff.

Your confirmation number is: 10362257.

WHAT TO EXPECT:

1. SDG&E will review the Application and work with you and your Account Executive (if applicable) to clarify and resolve any outstanding issues.
2. SDG&E will assign an Auditor that best fits the needs of your facility.
3. After the Auditor has been assigned by SDG&E, the Auditor will contact you to schedule a walk-through of your facility to take inventory of your existing energy consuming equipment.
4. At the conclusion of the walk-through, the auditor will analyze the information collected and begin to generate the Category 1 audit report.
5. Once the final report is completed, the auditor will submit the report to SDG&E for review.
6. Concluding SDG&E review, SDG&E will issue a NTP (Notice to Proceed) to the auditor to commence a final meeting with you and your Account Executive (if applicable) to review the report in detail and review the Energy Saving Opportunities identified.

An Email will be sent to you with your confirmation number. Feel free to close this page.