

TECH Clean California

Rules for Heat Pump Water Heater Projects



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Agenda

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6. **Install Requirements**
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9. **Key Considerations and Recap**

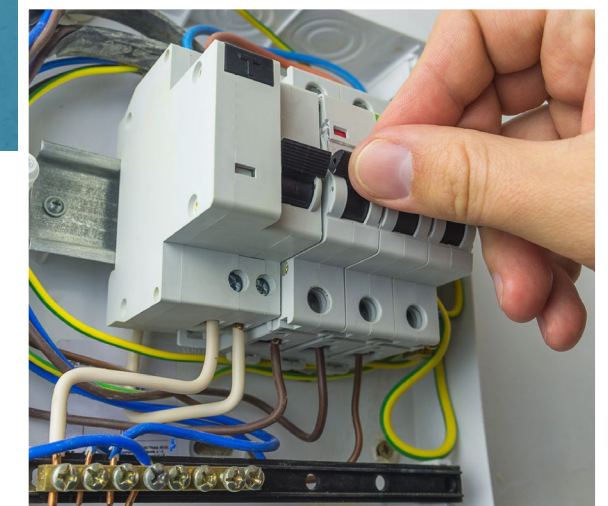
Program Overview



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Statewide Heat Pump Water Heater Incentives

- \$80M in additional incentives funding for heat pump water heaters through the TECH Heat Pump Water Heater Program
 - 50% of residential budget allocated for low-income customer installations
- Retrofit only, no new construction
- Eligible projects include residential single-family (unitary), residential multifamily (unitary and central), and commercial (unitary)
- New optimization requirements
 - Contractors: set up the heat pump water heater to shift electricity usage off evening “peak” hours
 - Customers: enroll in a demand response program and be on a time-of-use rate



Eligible Heat Pump Water Heater Project Types

- **Residential Unitary:** Heat pump water heater serves a single dwelling. *Two types:*
 - Single Family Unitary (single family home or individually-owned unit in a larger property)
 - Multifamily Unitary (any property with two or more dwelling units)
- **Multifamily Central:** Any residential project with one central heat pump water heater system serving more than one household
- **Commercial Unitary:** One heat pump water heater serving one non-residential customer. *Two types:*
 - Small Business Unitary (projects use the same equipment as residential unitary)
 - Large Commercial Unitary (projects use a commercial heat pump water heater)

All types of multifamily projects as well as large commercial unitary projects require a reservation and proof of milestone before submitting the final incentive claim.

Launch Dates

- **Single Family**

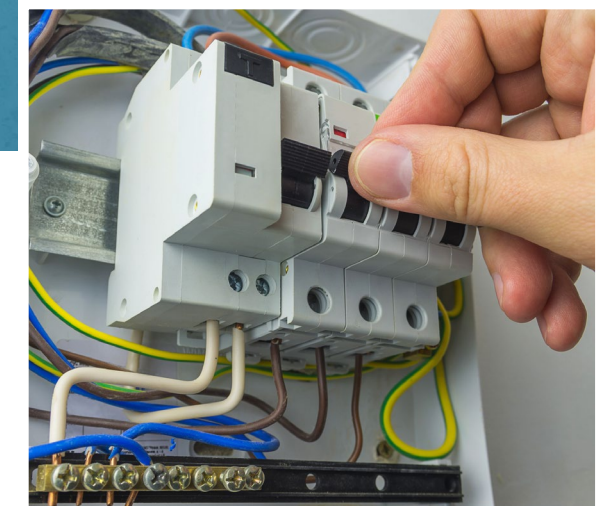
- General Market: 10/31/2023
- Equity: TBD

- **Multifamily**

- Unitary (General Market and Equity): 12/5/2023
- Central: TBD (Most Likely December)

- **Commercial**

- Small Business: 10/31/2023
- Large Commercial: 10/31/2023



Participant Requirements



Participant Enrollment Requirements

Overall Participant Requirements

1. Hold one of the eligible TECH license types (General A/B, C-20, C36)
2. Have no outstanding complaints with Better Business Bureau (BBB)
3. Meet the training requirements listed below
4. Signed updated Trade Professional Participation Agreement (TPPA)

Participant Training Requirements

- At least **one individual from an organization** must attend the ENERGY STAR® Manufacturer Action Council’s webinar training (training completion will be tracked)
 - Training schedule and sign up located at switchison.org/contractors/training-hub/
- Others at the organization must take one of the following training courses:
 - A state-certified apprenticeship program
 - TECH & ESMAC heat pump water heater training
 - Manufacturer-specific training located on [Contractor Knowledge Base](#) - search for “HPWH Training” to locate the article

Incentives Overview



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Statewide Heat Pump Water Heater General Market Incentives

Category	General Market or Equity	HPWH Incentive	Low-GWP Kicker Incentive**	≥ 55 Gallon Capacity Incentive	Electrical Panel Upgrade Incentive	Max Incentive
Residential Unitary	General Market	\$3,100	\$1,500	\$700	\$2,000*	\$7,300
Residential Central	General Market	\$900/kWh	\$200/kWh	N/A	N/A	\$300,000 per project
Commercial Unitary	N/A	\$700/kWh	\$200/kWh	N/A	N/A	\$50,000
Small Business Unitary	N/A	\$3,100	\$1,500	N/A	N/A	N/A

* For General Market customers, the Electrical Upgrade incentive is capped at 50% of eligible electrical costs

** Low GWP kicker incentive is for HPWHs with a refrigerant with GWP of 150 or less. Other ratings, such as OPD rating, cannot be used in place of GWP.

Statewide Heat Pump Water Heater Equity Incentives

Category	General Market or Equity	HPWH Incentive	Low-GWP Kicker Incentive**	≥ 55 Gallon Capacity Incentive	Electrical Panel Upgrade Incentive	Max Incentive
Residential Unitary	Equity	\$4,185	\$1,500	\$700	\$4,000*	\$10,385
Residential Central	Equity	\$1,000/kWh	\$200/kWh	N/A	N/A	\$300,000 per project

**For Equity customers, the \$4,000 incentive may cover a variety of other “pre-electrification” costs associated with a HPWH installation

** Low GWP kicker incentive is for HPWHs with a refrigerant with GWP of 150 or less. Other ratings, such as OPD rating, cannot be used in place of GWP.

Electrical and Pre-Electrification Upgrade incentives

Eligible Electric Upgrades

- Replace/upgrade/relocate main service panel
- Install smart load center/circuit breaker
- Install subpanel
- Upgrade feeder and/or secondary disconnect/dwelling unit main disconnect

Eligible Pre-Electrification Costs

(Equity Only)

- Relocate HPWH
- Additional plumbing/wiring upgrades
- Venting
- Replace/repair/seal flooring, walls, or ceiling due to leakage or improper venting

*Electrical Upgrade incentives **can only be paid to contractors who completed the work under their license**, meaning majority of measures can only be pursued by contractors with a General B or C-10. Adding a subpanel, however, is eligible to be pursued by all.*

Heat Pump Water Heater Incentive Rules – All Projects

- Thermostatic mixing valves are required on all installations and must be properly installed and calibrated
 - Thermostatic mixing valves must conform to ASSE 1017 (point of distribution)
 - Built-in thermostatic mixing valves may conform to UL 60730-1, ASSE 1082, or ASSE 1084
- Contractor must pass 100% of the incentive to the customer
- Incentives available for all replacements types except heat pump water heater to heat pump water heater conversions
 - Same incentive amount for electric conversions



Customer Eligibility



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Which Customers Qualify?

- 100% of residential customers in California qualify for TECH Heat Pump Water Heater incentives as long as they are replacing an existing non-heat pump water heater system!
- Commercial eligibility is limited to business served by one of the three electric IOUs (PG&E, SCE and SDG&E)
 - Eligible territory will expand over time. Please refer to the “Qualifying Customer’s” article on the TECH Clean California Knowledge Base for updates
- Customers may qualify for higher “Equity” incentives

Equity Customer Requirements



Single-family

- Live in single-family low-income residences
- Have household income which is ≤ 80 percent of the area median income (AMI) or ≤ 250 percent of Federal Poverty Level (FPL) (whichever is less stringent)
- Also available customers who have participated in/are eligible for specific other programs that verify income



Multifamily

- Deed-restricted low-income residential housing and is either:
 - Located in a disadvantaged community
 - A building where at least 80 percent of the households have incomes at or below 60 percent of the area median income
- Also available to customers who have participated in/are eligible for the MASH or SOMAH

Confirming Equity Eligibility

Single Family

- Customer uses free third-party online income verification service to provide proof of income or proof of participation in another income-verified program.
- Customer sends PDF confirmation (with no PII) to the contractor, who uploads to incentive claim (coming soon after launch).

Multifamily

- Building owner provides copy of deed restriction to the TECH Clean California team during reservation stage.

For more information: <https://switchison.org/techcleanca/hpwh-equity/>

Eligible Equipment



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Equipment Eligibility by Project Type

	Equipment Requirements
Residential Unitary (Single Family and Multifamily)	California Energy Commission (CEC) JA13 ¹ compliant and either : <ul style="list-style-type: none"> • NEEA² with EcoPort • or ENERGY STAR[®] Residential WH³ V4 (or later), Connected Capable.
Small Business	Same as above.
Multifamily Central	Standard Central: Approved and included in CBECC. *Individual or ganged-together: JA13 compliant or ENERGY STAR Commercial WH V 2.0 (or later).
Large Commercial	Individually installed: ENERGY STAR Commercial WH V 2.0 (or later). Ganged-together: JA13 compliant or ENERGY STAR Commercial WH ⁴ V 2.0 (or later).

*Individual or ganged-together central heat pump water heaters are unitary heat pump water heaters with integrated tanks that are installed individually, or plumbed together in parallel, to provide hot water to two more households, and do not include additional heat pump or electric resistance water heating equipment or storage tanks besides the unitary heat pump water heaters themselves.

1. [Joint Appendix JA13– Qualification Requirements for Heat Pump Water Heater Demand Management Systems](#)
2. [Northwest Energy Efficiency Alliance Residential Heat Pump Water Heater Qualified Products List](#)
3. [ENERGY STAR[®] Product Specification for Residential Water Heaters](#)
4. [ENERGY STAR[®] Product Specification for Commercial Water Heaters](#)

Overview of Eligible Residential Unitary Heat Pump Water Heater Products

Unitary heat pump water heater eligibility is the same for [Single-Family](#), [Multifamily Unitary](#), and [Small Business Unitary](#)

Eligible units include all heat pump water heaters (integrated and split) produced by the following brands

- Rheem (including 120v)
- Ruud
- AO Smith (including 120v)
- Bradford White
- State
- American Standard
- American
- Richmond
- Reliance
- Harvest Thermal
- Lochinvar

Commonly-installed brands that are not eligible at launch

- SanCO2

Eligible Multifamily Heat Pump Water Heaters

- Incentives are available for both in-apartment (“unitary”) heat pump water heaters and central heat pump water heaters
 - Eligible Multifamily Unitary heat pump water heaters are the same as single-family eligible heat pump water heaters
- Multifamily Central heat pump water heaters must qualify under one of the following pathways:
 - Standard Central HPWH: Approved and included in CBECC
 - Individual or ganged-together: JA-13 Compliant **or** ENERGY STAR® Commercial WH V 2.0 (or later)

All customized central heat pump water heaters submissions will be done as a “Customer Equipment Entry”- more info on upcoming slide

Eligible Commercial Heat Pump Water Heaters

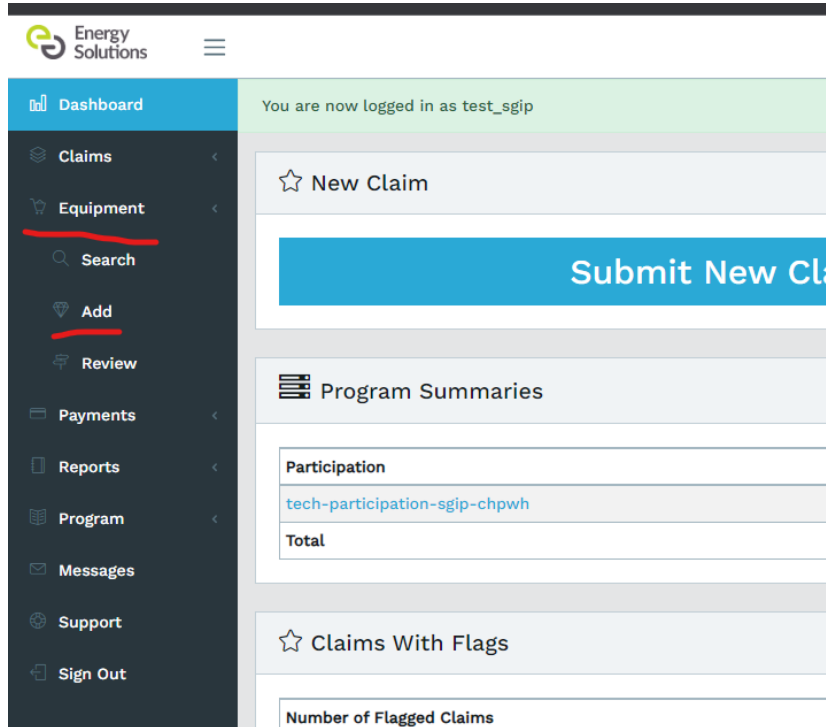
- Small business heat pump water heater requirements are the same as residential unitary heat pump water heaters
- Large commercial heat pump water heaters must qualify under one of the following pathways:
 - **Individually Installed:** ENERGY STAR® Commercial WH V 2.0 (or later).
 - **Ganged-together:** JA-13 Compliant **or** ENERGY STAR Commercial WH V 2.0 (or later).
- All eligible large commercial heat pump water heaters found here (filter for electric heat pump)
https://www.energystar.gov/products/commercial_water_heaters

All ganged-together heat pump water heater submissions will be done as a “Customer Equipment Entry”- more info on upcoming slide

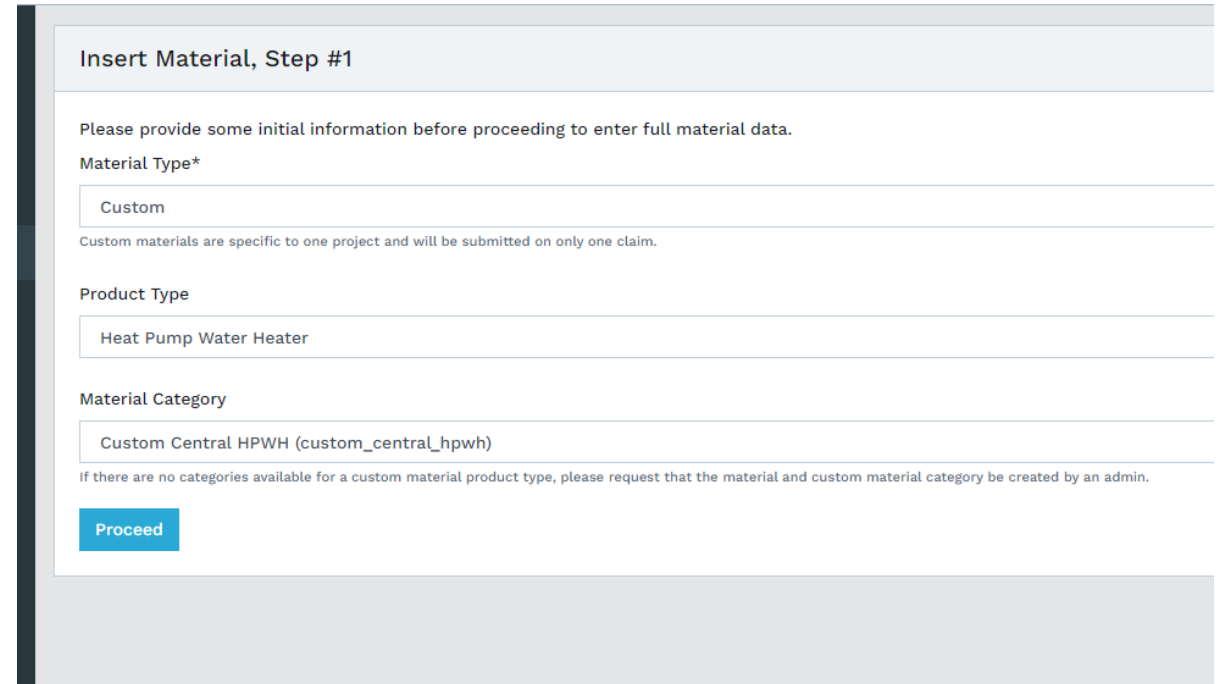
Custom Central Heat Pump Water Heater Submissions

- Multifamily central heat pump water heater equipment and large commercial installations will be entered as “**Custom Equipment Entries**”
 - This includes fully custom designed systems **and** ganged-together units that are on the pre-approved residential unitary QPL
- Each custom equipment will be stored to the individual participant account, meaning it will be an option they can select if installed multiple times
- Participants will have to enter in the following information
 - Brand Name (select one of the brands associated with the system)
 - System Model Number (custom model number)
 - Individual HPWH model number(s) (up to 8)
 - Storage tank model number(s) (up to 8)
 - Swing tank model number(s) (up to 2)
 - System heating capacity (BTUh)
 - COP
 - Total Storage Capacity (gal)
 - Refrigerant GWP

Custom Central Heat Pump Water Heater Equipment Entry



The screenshot shows the Energy Solutions dashboard. The 'Equipment' menu item is highlighted with a red underline. The 'Add' button is also highlighted with a red underline. The dashboard includes a navigation sidebar, a user login status bar, and several main content sections: 'New Claim' with a 'Submit New Claim' button, 'Program Summaries' with a table for 'Participation' and 'Total', and 'Claims With Flags'.



The screenshot shows the 'Insert Material, Step #1' form. It includes the following fields and text:

- Material Type***: Custom
- Product Type**: Heat Pump Water Heater
- Material Category**: Custom Central HPWH (custom_central_hpwh)

Additional text in the form includes: "Please provide some initial information before proceeding to enter full material data." and "Custom materials are specific to one project and will be submitted on only one claim." A "Proceed" button is located at the bottom of the form.

Step 1: Select equipment

- Then "Add"

Step 2: Select the following

- Material Type: Customer
- Product Type: Heat Pump Water Heaters

Custom Central Heat Pump Water Heater Equipment Entry

Integer: Heating capacity in BTUH

COP

20

Decimal: System COP

Total Storage Capacity (gal)

500

Decimal: Total system storage capacity in gallons

GWP

12

Decimal: Greenhouse Warming Potential of refrigerant

Unique Identifier

123 Main Apartments

Text: Unique Identifier for Equipment

Supporting File

Choose File No file chosen

Support file for material. Not required.

Supporting File

Choose File No file chosen

Support file for material. Not required.

Supporting File

Choose File No file chosen

Support file for material. Not required.

Submit



Add Material to Claim

Material lookup helper (or enter Source ID below)

* Product Type Central Heat Pump Water Heater x

Manufacturer A.O. SMITH x

Model select... Model1

* Source ID

Enter Source ID directly, or use helper above.

* Quantity

Whole numbers only

* Serial Numbers

Enter one serial for each in Quantity, comma-separated.

Add This Material to Claim Cancel

Step 3: Fill out required information and click "Submit"

- Manufacturer: select the manufacturer associated with one component of the system
- Model name: something easy to remember for selecting on claim
- Source ID: Combo of manufacturer and model name

Step 3: Add Equipment to claim

- Start claim
- Select Material and then "Central HPWH"
- Select Custom model number
- Add to claim

Installation Requirements



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Installation Requirements by Project Type

	Installation Requirements
Residential Unitary (Single Family and Multifamily)	<ul style="list-style-type: none">• Contractor must set the heat pump water heater to follow a TOU rate schedule via the manufacturer app.• Unit must be sized at a minimum to meet California Plumbing Code first-hour rating requirement.
Small Business	Same as above.
Multifamily Central	Installed and operated to shift $\geq 5\text{kg CO}_2/\text{kWh}$. Must install data monitoring equipment with 2-way communication.
Large Commercial	Installed and operated to shift $\geq 5\text{kg CO}_2/\text{kWh}$.

Sizing Requirements for Residential Unitary

Applies to all Single Family and Multifamily Unitary heat pump water heater installations

Units must **be sized to meet first hour rating** requirements as defined by CA plumbing code

- Participants will be asked to report on number of bedrooms and bathrooms in the residence or business to confirm heat pump water heaters were sized appropriately

Number of Bathrooms	1 – 1.5	1 – 1.5	1 – 1.5	2 – 2.5	2 – 2.5	2 – 2.5	2 – 2.5	3-3.5	3-3.5	3-3.5	3-3.5
Number of Bedrooms	1	2	3	2	3	4	5	3	4	5	6
First Hour Rating (Gallons)	38	49	49	49	62	62	74	62	74	74	74

Chapter 5, Table 501.1(2) in 2022 California Plumbing Code

TOU Rate Scheduling Requirement

Applies to all single-family, multifamily unitary, and small business heat pump water heater installations

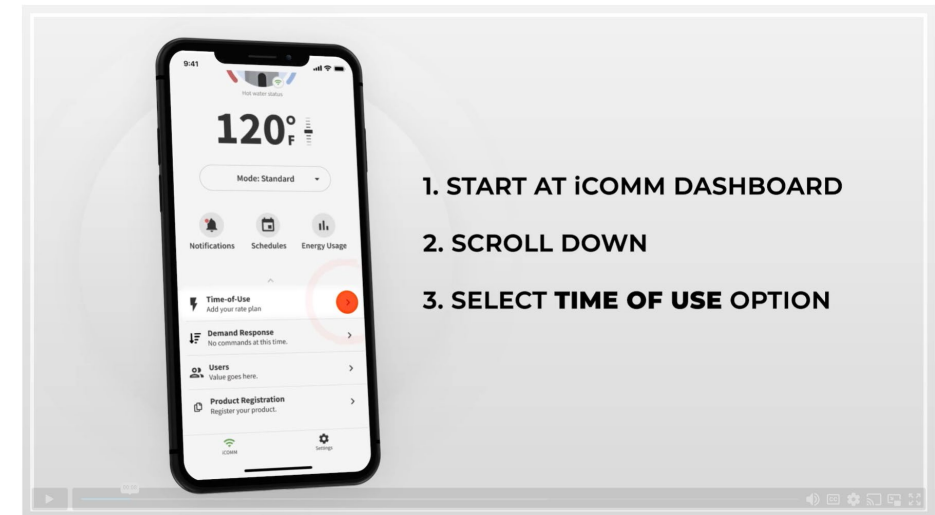
Contractors must set up the heat pump water heater, during installation, to follow a time-of-use rate.

See the “HPWH Installation Requirements and TOU Rate Scheduling” article on the **TECH Contractor Knowledge Base**

Rheem Contractor App Example



AO Smith iCOMM Example



iCOMM - How to Add a Utility Time of Use Plan

Multifamily Central and Large Commercial Installation Requirements

- Installed and operated to shift $\geq 5\text{kg CO}_2/\text{kWh}$. Multifamily Central must install data monitoring equipment with 2-way communication*
- System eligibility will be determined through use of **Ecotope's Ecosizer calculator**, which can be found at techcleanca.com/incentives/multifamily-information/

*Large commercial installations do not need to include data monitoring equipment

Customer Requirements



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Enrollment Requirements by Project Type

	Enrollment Requirements
Single Family Unitary & Small Business Unitary	Customer must enroll on a TOU rate and in demand response program
Multifamily Unitary	Property owner must enroll common area meter on TOU rate and in a demand response program – no requirements for tenants
Multifamily Central	Property owner must enroll meter(s) linked to central heat pump water heater in a demand response program – no requirements for tenants
Large Commercial Unitary	Customer must enroll in a demand response program

Demand response and time-of-use not required for occupants of rental properties with two or more units. For common areas that have significant flexible loads, property owners are required to enroll those electric accounts in a qualifying demand response program and time-of-use rate.

Customer Program Terms and Conditions

- All customers receiving TECH incentives must sign the TECH Program Terms and Conditions. This agreement will replace the contractor to customer contract that the program currently requires
 - Signed terms & conditions form will need to be uploaded to claim form
- Customers will have to provide the following for heat pump water heater projects only (through terms & conditions)
 1. Confirmation that they allow their utility to switch them onto a time-of-use rate if they are not already on one. They can specify a specific rate or choose the default
 2. Confirmation that they will enroll in an eligible demand response program if there is one available to them
 3. Electric account number

Blank fillable version of the Customer Program Terms & Conditions form located at <https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Contractor-Invoice-Customer-Agreement>

Time-of-Use and Demand Response Details

Time-of-Use (TOU):

- Customers can opt to be placed on the default time-of-use rate or one of their choosing
- Any customer already on a time-of-use rate will not have their rate changed unless specified
- Solar and EV rates are time-of-use rates, meaning if that is what a customer is on, nothing more is needed

Demand Response

- Many options, enrollment can be as quick as 3 minutes
- Contractors can suggest a particular program
- Contractor expected to help the customer to enroll before offering the incentive

*Residential customers of utilities without time-of-use rates and/or without an eligible demand response program are still eligible for TECH HPWH Incentives but are **exempt** from these requirements.*

Please see the following webpages for information and FAQs on Time-Of-Use Rates and Demand Response:

Time-of-Use Rates: <https://switchison.org/techcleanca/time-of-use-rates/>

Demand Response: <https://switchison.org/techcleanca/demand-response>

Demand Response Expectations for Contractors

We understand that this requirement is a significant added effort on top of your typical business practices, and verification could take some time on our end. Therefore, to support your cash flow, we will **pay incentives prior to confirming demand response enrollment for any single-family and small business incentive claims.**

- However, it is critical that the program has a high percentage of customers enrolling in demand response to ensure future funding.
- Correct actions, such as program suspensions, can be taken for contractors whose customers do not consistently enroll in a demand response program.

Details on available demand response programs and FAQs are located at <https://switchison.org/techcleanca/demand-response>

Customer Agreement



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Customer T&C Overview

- Required for both HVAC and WH submissions
 - HVAC projects will only require a customer signature and uploaded copy
 - WH projects will require customer to fill out section specific to HPWH projects
- Highly recommended that customers acknowledge T&Cs prior to getting into contract
 - Ensures there are no surprises that could put the incentive at risk
- Provides protections to the participant specifically around budget availability to prevent issues where the job is sold but budget runs out prior to reserving the funds

Blank copies can be found here:

<https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Contractor-Invoice-Customer-Agreement>

Customer T&Cs Overview

Customer Agreement to TECH Program Terms and Conditions

Program Description: The TECH Clean California initiative (hereafter referred to as the "Program") provides incentives for the installation of qualifying HVAC heat pumps ("HVAC Heat Pumps") and Heat Pump Water Heaters ("HPWH") at qualifying customer ("Customer") sites. Program incentives are paid to the installing contractor ("Participating Trade Professional") on the condition that the full amount of the incentives is provided to the Customer, or other party designated by the Customer, to discount project costs. Only residential Customers (including single family and multifamily buildings) in California are eligible to receive HVAC Heat Pump incentives. All residential Customers in California, and commercial Customers served by Pacific Gas & Electric ("PG&E"), Southern California Edison ("SCE"), and San Diego Gas & Electric ("SDG&E"), are eligible to receive HPWH incentives. More information on the Program is available at: [website]

Cohen Ventures, Inc. dba Energy Solutions ("Energy Solutions") is implementing the Program on behalf of the Southern California Edison Company ("SCE"), which is administering the Program at the direction of the California Public Utilities Commission ("CPUC").

By signing this document, you, as a prospective Program Customer, are consenting to the Program terms, and are indicating you have read and understand the Program disclosures, set forth below. You, or the utility account holder ("[Account Holder](#)") if a different party, in certain instances as indicated below, are also agreeing to the sharing of certain information to permit the processing of incentive payments and to the enrollment of your electric service account in a Time of Use ("TOU") rate plan.

Section 1: General Terms and Conditions

NOTICE

California Consumers are not obligated to purchase any full fee service or other service not funded by this program. This program is funded by California ratepayers and taxpayers and administered and implemented by Energy Solutions through a contract with Southern California Edison Company on behalf of various California utilities and under the auspices of the California Public Utilities Commission (CPUC). Any data related to this program, including any customer data, will be shared with authorized entities, including but not limited to, policy makers, program implementers, and the program evaluator under confidentiality protocols. As this data will not be made public and will follow the confidentiality rules and protocols established by

the CPUC in prior proceedings, it does not require individual customer permission.

Qualifying Equipment: Only Qualifying Equipment, limited to the equipment listed at <https://frontierenergy-tech.my.site.com/contractorsupport/s/>, is eligible for the receipt of Program incentives.

Program Funding: This Program is funded by California ratepayers and taxpayers. Both total and certain segments of Program incentive funding are subject to certain limits and available on a first-come, first-served basis until the funding is exhausted or the Program is terminated. Funding for HPWH projects may be provided by the Self-Generation Incentive Program ("SGIP") HPWH program adopted by the CPUC in Decisions 19-09-027 and 20-01-021.

Cancellation policy, requirements, process, and any applicable fees: There is no fee for participating in the Program. You should be aware, however, that if you select a Participating Trade Professional who is subsequently dismissed from the Program for any reason, the Participating Trade Professional may no longer qualify for incentives and may not pass any discount on to you, depending on the agreement you make with your Participating Trade Professional. None of Energy Solutions, SCE, or the other California utilities are party to the agreement you make with your Participating Trade Professional, and you must resolve any dispute you have with them.

Risks and Benefits of Participation: There are no guaranteed benefits for participating in the Program. When available, incentives can significantly reduce upfront costs of installations of Qualifying Equipment, but there are no guarantees such installations will deliver a certain amount of energy savings. Neither the Program, its sponsors or Energy Solutions assume any liability for any unpaid incentives, which may present a risk to the installing Participating Trade Professional and you. By signing below, you acknowledge and accept all risks associated with participating in the Program.

Affiliations: Installing Participating Trade Professional and Energy Solutions or other third parties associated with the Program are not representatives of or affiliated with SCE, the CPUC or any Gas Corporation.

Installation Requirements: The Qualifying Equipment must be installed for your benefit only and, if the Qualifying Equipment is a HVAC Heat Pump, it must be installed in place of an existing furnace, or have controls installed that prevent the existing furnace from operating as the main heating source.

Quality Assurance and Quality Controls Protocols: All applications for incentives will be subject to automated and manual protocols designed by Energy Solutions to determine Program eligibility and detect fraud. Such protocols may evaluate equipment and customer eligibility, confirm an existing heating system was replaced, and determine if the installed Qualifying Equipment is in good working order.

Inspections, Verification, and Evaluation: The installation of equipment will be subject to verification and metering by Energy Solutions, its representatives and Program evaluators, as approved by CPUC. Verification, evaluation (including onsite inspections at your address) and metering may be performed on all Qualifying Equipment or a select portion thereof. Evaluation

Customer T&Cs

Section 2: Heat Pump Water Heater Terms and Conditions

The utility Account Holder, or an authorized representative of the Account Holder, must complete this section in order for the project to qualify for Program HPWH incentives.

If the Account Holder is not the same party as the Customer (e.g., the Customer is the property owner but the Account Holder is a tenant), the Account Holder must complete and sign this section, and the Customer must complete and sign Section 3.

Who should sign



The Account Holder who must complete this section is determined by project type, as listed below:

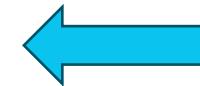
- For Multifamily Unitary HPWH projects (i.e., residential buildings with 2 or more residences): the utility account holder for the property's common meter(s).
- For Multifamily Central HPWH projects (i.e., residential buildings with 2 or more residences): the utility account holder for the meter(s) that serves the central HPWH.
- For all other residential and non-residential projects: the utility account holder for the residence or business.

Demand Response Program Enrollment Requirement:

Demand response (DR) programs help consumers lower their electricity usage during the times of day when there is the greatest demand on the electric grid. These programs send notifications to consumers or appliances to optimize the timing of their energy usage for bill savings and public benefits. **Account Holder must check the box below and agree to enroll in a qualified DR program and stay enrolled for a minimum of three years. Please visit switchison.org/techcleanca/demand-response/ to learn more about qualified DR program options and benefits.**

- I, the Account Holder or authorized representative of the Account Holder, understand and agree that I will enroll in a qualifying demand response program for three years, if one is available in my area. If there is a program for HPWH optimization available in my area, I acknowledge that I will receive information about it.

Demand response program enrollment acknowledgement



Overview of time-of-use rate requirement



Time Of Use Rate Enrollment Requirement:

This requirement applies only to:

- Residential Unitary HPWH projects (including single family home utility accounts, and multifamily common area utility accounts)
- Small Business Unitary HPWH projects (i.e., projects at non-residential buildings that meet the requirements for Residential Unitary HPWH installations including equipment, installation, and enrollment requirements)

Customer T&Cs

Account Holder must enroll in a TOU rate if they are not already enrolled in a TOU rate. If you do not indicate a specific TOU rate you wish to enroll in below, you agree that your electric utility will enroll you in its default TOU rate plan, as a condition of your participation in the Program. If you already are on a TOU rate, your electric utility will keep you on that rate unless you elect a different TOU rate choice below. Once your TOU rate enrollment, or TOU rate change if you elect that option, has been completed by your electric utility, you are expected to remain on that billing rate for 12 months. Program incentives cannot be paid until your electric utility confirms this TOU rate enrollment to Energy Solutions. If you purchase electricity through a Community Choice Aggregator ("CCA"), your enrollment will be completed by your electric utility on behalf of your CCA.

Time-of-use rate
enrollment
acknowledgement



Account Holder must check the box below to agree to TOU rate enrollment. TOU rate enrollment is not required if your electric service provider does not offer TOU rates or is not listed on switchison.org/techcleanca/time-of-use-rates/. Please visit switchison.org/techcleanca/time-of-use-rates/ to learn more about the various TOU rate options available to you. I, the Account Holder or authorized representative of the Account Holder, understand and agree that if my electric utility offers TOU rates and I am not already enrolled on a TOU rate, my electric utility will move me onto a TOU rate.

Check one of the following:

- At least one of the following conditions apply to me:
- I am not enrolled in a TOU rate, and I request that my electric utility enroll me in its default TOU rate, if one exists;
 - I am already on a TOU rate, and I request that my electric utility keep me enrolled in that rate plan.
 - I am not sure whether I am on a TOU rate and accept that my utility will move me to its default TOU rate if I am not already on one.
 - My utility is not listed on the website above and therefore I am not required to enroll in a TOU rate.
 - My project type (Multifamily Central or Large Commercial) is exempt from this requirement.
- I would like my utility to move me to the following rate: . If the rate I have listed is not valid, I request that my electric utility to enroll me into its default TOU rate, if one exists.



Time-of-use rate
option selection

Customer T&Cs

Customer account number. **Incorrect numbers will lead to claim approval delays!**



If you receive electric service from **Pacific Gas & Electric (“PG&E”)**, you must list your **Service Agreement ID** in the space provided below for the purpose of verifying your eligibility to receive Program incentives. This number is located on your PG&E bill and is 10 digits long:

PG&E Service Agreement ID:

If you receive electric service from **Southern California Edison (“SCE”)**, you must list your **Service Account Number** in the space provided below for the purpose of verifying your eligibility to receive Program incentives. This number is located on your SCE bill and is 10 digits long, beginning with “800”:

SCE Service Account Number: 8 0 0

If you receive electric service from **San Diego Gas & Electric (“SDG&E”)** you must list your **Account Number** in the space provided below for the purpose of verifying your eligibility to receive Program incentives. This number is located on your SDG&E bill and is 12 digits long:

SDG&E Account Number:

You hereby agree that Energy Solutions may share this account number information with your electric utility for the purpose of verifying your eligibility for Program participation, verifying your enrollment in a DR program, and enrolling your utility account, or confirming that your utility account is enrolled, in a TOU rate. Energy Solutions shall not use this account number information for any other purpose and will not retain this information for longer than reasonably necessary to comply with Program requirements.

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Account Holder Signature

Full Name

Date

Customer Agreement

Some information filled out here will need to be noted again on the claim form including:

- Customer utility provider
- Which time-of-use rate they choose to enroll in
- Account number (all IOUs)
- Confirmation customer will enroll in a demand response program

A copy of the form will also have to be uploaded

Section 3: Acknowledgment and Signature




Customer, check one or both of the following:

- I am applying for Program incentives for a HVAC Heat Pump. I agree to the terms and conditions of Section 1.
- I am applying for Program incentives for a Heat Pump Water Heater (HPWH). I agree to the terms and conditions of Section 1, and if I am the Account Holder or representative authorized by the Account Holder, I have completed and agree to the terms and conditions of Section 2. If I am not the

Account Holder or representative authorized by the Account Holder, I have confirmed that this party has completed and signed Section 2.

Customer, you are encouraged, but not required, to check the following:

- (Optional) I would like to be contacted about future demand response programs that interact with my HPWH for additional electric bill savings, and I hereby consent to Energy Solutions sharing my contact and equipment information with potential third-party suppliers of such services for the limited purpose of providing such information to me.

		
Customer Signature	Full Name	Date

Key Considerations & Recap



Key Considerations for All Projects

- Thermostatic mixing valves and permits are required on 100% of HPWH submissions
- Ask your customer who provides their electricity as it will be required to note on the claim and it will determine whether they need to enroll in a time-of-use rate and demand response program
- All customers receiving TECH Clean California incentives (heat pump water heater or heat pump HVAC) must sign the new customer program agreement
- Customers with solar or an EV charger are likely already on a time-of-use rate
 - In fact, most customers with PG&E, SCE and SDG&E are defaulted onto a time-of-use rate
- Time-of-use enrollment must be confirmed by the utility before incentives can be paid
 - Nothing needed from the participant beyond confirming what rate the customer is being switched to and verifying account number is correct, but it *could* impact incentive payment timeline

Single Family: Participation Steps to Keep in Mind

- Reservations are not required but *highly* recommended. To reserve funds, start a claim at www.catechincentives.com and save it as a draft
- Customers with lower incomes may be eligible for higher “equity” incentives
- Ensure you can effectively report relevant electrical and/or pre-electrification costs if pursuing the electrical/pre-electrification incentives
- Review the claim form and/or check-list (on [Knowledge Base](#) and [Incentive Resources](#) pages)
 - The claim form will ask for information that is above and beyond what you normally collect so being familiar with the requirements will reduce the needs to reach back out to the customer or go back on site

Multifamily: Participation Steps to Keep in Mind

- All multifamily projects will require initial reservations
 - Reservation form can be found at techcleanca.com/incentives/multifamily-information/
 - All reserved projects will have a **90-day proof of project milestone check point**, which will require participant to submit design drawings and equipment specifications
- Multifamily is defined as any building with more than one unit. This is a change from the first round of TECH Clean California incentives.
 - This will not impact the available incentive as incentive rates for unitary heat pump water heaters are the same for multifamily or single-family
- Only the common area meters will need to be enrolled on a time-of-use rate and demand response program if one is available. Individual tenant meters are *exempt* from this requirement, but it's recommended.
- Central heat pump water heater incentives are determined by use of Ecotope's Ecosizer calculator located at techcleanca.com/incentives/multifamily-information/

Commercial: Participation Steps to Keep in Mind

- Commercial heat pump water heater incentives are limited to businesses served by one of the electric IOUs **only** – PG&E, SCE and SDG&E
 - Eligible commercial territories may expand in the future
- Only projects where the heat pump water heater serves one individual business qualify
- Buildings don't need to be truly commercial - they could be any non-residential building such as a government building or school.
- Reservations not required but *highly recommended* for Small Business applications
 - Small Business Reservations are generated by starting a claim and saving as a draft
- Reservations are **required** for Large Commercial
 - Reservation form can be found on the TECH Commercial HPWH specific webpage

Program Resources



Available Resources

Contractor Hub: <https://switchison.org/contractors/tech-clean-california/>

- Provides access to key resources such as the training hub, marketing materials and incentive portals

HPWH Requirements Landing Page: <https://switchison.org/techcleanca/hpwh-incentives/>

- Landing page for customers and contractors to learn more about demand response, time-of-use, and Equity incentives

Incentive Resources: <https://switchison.org/contractors/incentive-resources/>

- Specific information on incentives with available flyers, qualified products list, program budget table

Knowledge Base: <https://frontierenergy-tech.my.site.com/contractorsupport/s/>

- Searchable site with in-depth articles to help contractors navigate all aspects of TECH

Commercial Incentives Site: <https://techcleanca.com/incentives/commercial>

- Commercial incentives overview as well as reservation portal for commercial incentives

Multifamily Incentives Site: <https://techcleanca.com/incentives/multifamily-information/>

- Multifamily incentives overview as well as reservation portal for multifamily incentives

YouTube Page: <https://www.youtube.com/@TECHCleanCalifornia/videos>

- Various videos about the program, including previous onboarding and rules webinar recordings

Thank You

Thank you for attending this training about TECH Clean California heat pump water heater incentives and requirements.

We look forward to working with you!

To contact us, please email:
TECH.contractor@energy-solution.com



10. Claim Form Fields



TECH CLEAN
CALIFORNIA

Single Family Claim Form Fields

Asterixis () denote new or updated fields*

Site and Customer Information

- Name
- Street Address
- Phone Number
- Electricity Provider
- Number of Bedrooms and Bathrooms in the house*
- Previous Water Heater fuel type
- Previous Water Heater tank size
- Previous Water Heater product type

Project Information

- Invoice Number (optional)
- Incentive Confirmation (the incentive is on the invoice)
- Passthrough Method
- Permit Number
- Installation Completion Date
- Program Terms & Conditions signed date (replacing contract date)*
- Distributor (through which the heat pump water heater was purchased)
- Other Electrical Generation on-site (solar, battery, etc)*

Single Family Claim Form Fields

Asterixis () denote new or updated fields*

Equipment Information

- Manufacturer
- Model
- Serial number
- Quantity Installed

Installation Details

- Was the installation an emergency replacement?*
- Location the unit was installed
- Confirmation that an eligible thermostatic mixing valve was installed or is integrated
- What temperature was the heat pump water heater left in at time of installation?*
- What mode was the heat pump water heater left in at time of installation?*

Electrical Upgrades

- Was an electrical upgrade required?
- Type of electrical upgrade (choose from a list)*
- Pre-installation electrical panel capacity (amps)
- Post-installation electrical panel capacity (amps)
- Total cost of electrical upgrades qualifying for electrical upgrade incentive*

Single Family Claim Form Fields

Asterixis () denote new or updated fields*

Equity Incentives*

- Does the customer qualify for equity incentives?*
- Which prior income-verified program did the customer participate in?*
- Other measures associated with the heat pump water heater installation (pick-list)*
- Total cost of upgrades qualifying for equity installation costs incentives*

DR and TOU Requirements

- Confirm the units were programmed to follow customer's time-of-use rate schedule*
- Which demand response program(s) did the customer enroll in?
- Did the customer choose a time-of-use rate to be moved to? If so, which rate?*
- Was a communication module add-on unit installed?*

Photos and PDF Attachments

- Invoice
- Signed Program Customer Terms & Conditions*
- Installation Photos
 - Previous heat pump water heater
 - New heat pump water heater nameplate
 - Installed thermostatic mixing valve
 - Electrical meter (not panel)*
 - Screenshot from contractor app showing confirmation of JA-13 enablement*
 - Photo of heat pump water heater control panel showing temperature and mode*
 - Close up image of capped gas line
 - Zoomed out photo showing*
 - Hot and cold-water lines, insulated first 5' from tank
 - Heat pump water heater earthquake strap
 - Temperature pressure release valve (TPRV)
 - Condensate drain line and where it's being drained