

TECH Clean California How to Complete the Multifamily Incentive Reservation Form

The TECH Multifamily Incentive Reservation Form consists of 5 web-based pages to be completed:

Page 1: Property and Property Owner Information

Page 2: Contractor Information

Page 3: Qualifying Equipment Scope of Work

Page 4: Anticipated Layered Incentive Programs, Project Notes, and Acknowledgement of Terms and Conditions and Qualifying Equipment Requirements

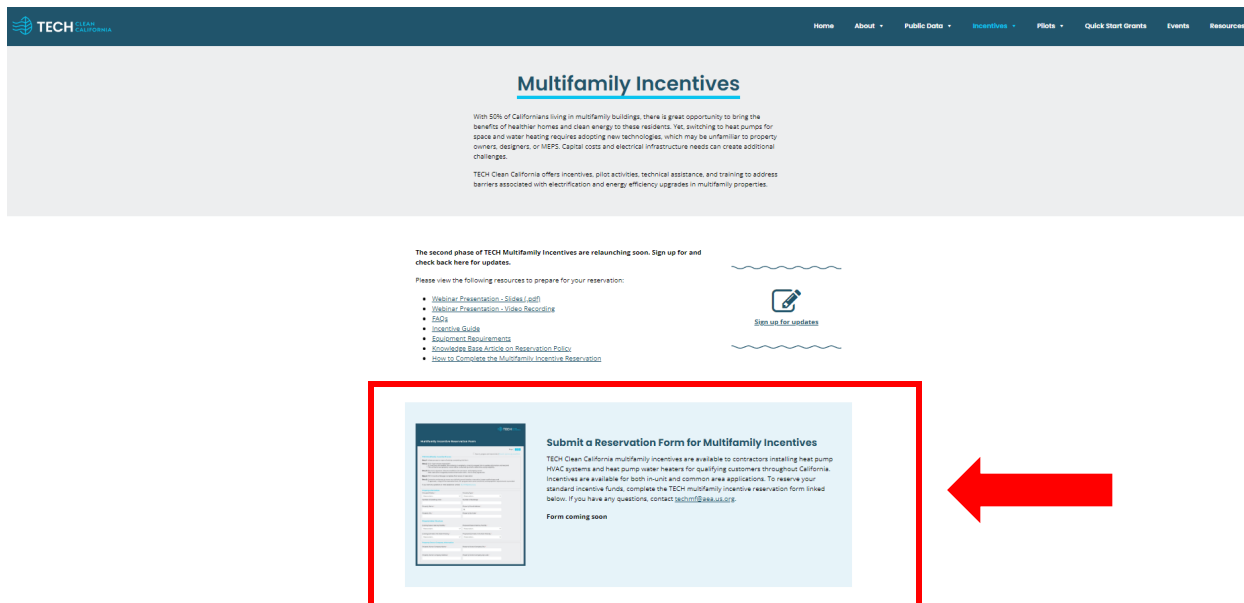
Page 5: Review and Submit Reservation Form

Follow the steps in this document to complete and submit the form. **All form fields with a red asterisk ^{*} are required.**

Contact TECHMF@aea.us.org if you have questions or need assistance completing the form. We recommend adding/saving TECHMF@aea.us.org as an email contact to ensure you receive all program correspondence and to avoid important emails going to your 'Junk' folder.

1) Click on the link to go to the online TECH Multifamily Incentive Reservation Form:

(Important: The reservation form will be posted on the following link on **September 6th at 12PM PST: [TECH Public Reporting Multifamily Incentives \(techcleanca.com\)](https://techcleanca.com). An email announcement will be sent when the link is live)**



The screenshot shows the TECH Clean California website. The main heading is "Multifamily Incentives". Below it, there is a paragraph explaining the benefits of heat pump HVAC systems and heat pump water heaters. A list of resources is provided, including a link to "Submit a Reservation Form for Multifamily Incentives". A red box highlights this link, and a red arrow points to it from the right.

2) Page 1: Enter the Property Information:

Property Information

Occupant Status *	Housing Type *
<input type="text" value="Please select..."/>	<input type="text" value="Please select..."/>
Number of Dwelling Units *	Number of Buildings *
<input type="text"/>	<input type="text"/>
Property Name *	Property Street Address *
<input type="text"/>	<input type="text" value="Q"/>
Property City *	Property Zip Code *
<input type="text"/>	<input type="text"/>

3) Select the Property Meter Structure: (*Owner or Tenant*)

Property Meter Structure

Existing Space Heating Paid By *	Proposed Space Heating Paid By *
<input type="text" value="Please select..."/>	<input type="text" value="Please select..."/>
Existing Domestic Hot Water Paid By *	Proposed Domestic Hot Water Paid By *
<input type="text" value="Please select..."/>	<input type="text" value="Please select..."/>

4) Enter the Property Owner Company Information

Property Owner Company Information

Property Owner Company Name *	Property Owner Company City *
<input type="text"/>	<input type="text"/>
Property Owner Company Address *	Property Owner Company Zip Code *
<input type="text"/>	<input type="text"/>

5) Enter the Property Owner Contact Information. There are two types of contacts, Primary and Signatory. The Primary Contact will be used for regular program correspondence and the Signatory Contact is the individual that signs the reservation agreement.

If the Primary and Signatory Contact are the same person, select 'Yes', enter the information below, and click 'Next Page'.

Property Owner Contact Information

The Property Owner Primary Contact will be used for regular program correspondence. The Signatory Contact will be individual to sign the reservation agreement.

Are Signatory and Property Owner Primary Contact the same person? *

☒ Yes
☐ No

Property Owner Primary Contact Information

Property Owner Primary Contact First Name *

Property Owner Primary Contact Last Name *

Property Owner Primary Contact Email *

Property Owner Primary Contact Phone *

Property Owner Primary Contact Title *

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If the Primary and Signatory Contact are different, select 'No'. Separate fields for Primary and Signatory Contact will appear. Enter the individual information and click 'Next Page'.

Property Owner Contact Information

The Property Owner Primary Contact will be used for regular program correspondence. The Signatory Contact will be individual to sign the reservation agreement.

Are Signatory and Property Owner Primary Contact the same person? *

☐ Yes
☒ No

Property Owner Primary Contact Information

Property Owner Primary Contact First Name *

Property Owner Primary Contact Last Name *

Property Owner Primary Contact Email *

Property Owner Primary Contact Phone *

Property Owner Primary Contact Title *

Property Owner Signatory Contact Information

Property Owner Signatory Contact First Name *

Property Owner Signatory Contact Last Name *

Property Owner Signatory Contact Email *

Property Owner Signatory Contact Phone *

Property Owner Signatory Contact Title *

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- 6) Page 2: Enter the Contractor Company information by selecting one of these options
- Select 'TECH Enrolled Contractor' to search and start typing the Contractor Company Name. Information will populate automatically once a Contractor Company is selected.

- Select 'Add Contractor' if you do not find your Company or if information is incorrect and complete the fields. Note: Contractor Companies are added weekly, this does not affect your enrollment in TECH.

Page 2

Contractor Company Information

Select a TECH Contractor

☐ TECH Enrolled Contractor
☒ Add Contractor

Contractor companies are added weekly, if you do not find a company select "Add Contractor". (This does not affect your enrollment in TECH)

New Contractor

Contractor Company Name *

Contractor Company Street Address *

Contractor Company City *

Contractor Company Zip Code *

CSLB Number *

- 7) Enter the Contractor Contact Information. There are two types of contacts, Primary and Signatory. The Primary Contact will be used for regular program correspondence and the Signatory Contact is the individual that signs the reservation agreement.

If the Primary and Signatory Contact are the same person, select 'Yes', enter the information below, and click 'Next Page'.

Contractor Contact Information

The Contractor Primary Contact will be used for regular program correspondence. The Signatory Contact will be individual to sign the reservation agreement.

Are Signatory and Contractor Primary Contact the same person? *

☒ Yes
☐ No

Contractor Primary Contact Information

Contractor Primary Contact First Name *

Contractor Primary Contact Last Name *

Contractor Primary Contact Email *

Contractor Primary Contact Phone *

Contractor Primary Contact Title *

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If the Primary and Signatory Contact are different, select 'No'. Separate fields for Primary and Signatory Contact will appear. Enter the individual information and click 'Next Page'.

Contractor Contact Information

The Contractor Primary Contact will be used for regular program correspondence. The Signatory Contact will be individual to sign the reservation agreement.

Are Signatory and Contractor Primary Contact the same person? *

☐ Yes
 ☒ No

Contractor Primary Contact Information

Contractor Primary Contact First Name *

Contractor Primary Contact Last Name *

Contractor Primary Contact Email *

Contractor Primary Contact Phone *

Contractor Primary Contact Title *

Contractor Signatory Contact Information

Contractor Signatory Contact First Name *

Contractor Signatory Contact Last Name *

Contractor Signatory Contact Email *

Contractor Signatory Contact Phone *

Contractor Signatory Contact Title *

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- 8) Page 3: Enter Equipment Scope of Work. Enter the measure quantities proposed for installation and the measure’s total incentive will automatically be calculated. The Total TECH Standard Incentive Reserved will be calculated at the bottom of the page. Click ‘Next Page’ to move forward.

Page 3

Reservation for Qualifying Equipment Scope of Work (Retrofit Only)

Heat Pump Water Heater (HPWH)

Individual HPWH: In-Apt or Common Area

Previous Water Heating Source	HPWH Tank Size	Incentive for Individual Apartment	Qty of HPWHs	Total Incentive
Electric Resistance to HPWH	All	\$700	<input type="text"/>	\$0
Gas/Propane to HPWH	< 55 Gallons	\$1400	<input type="text"/>	\$0
Gas/Propane to HPWH	≥ 55 Gallons	\$2100	<input type="text"/>	\$0

Central HPWH

Previous Water Heating Source	HPWH Tank Size	Incentive for Equipment serving 2+ Apartments	Qty of Apts served	Total Incentive
All Non-Heat Pump Systems	< 17 Gallons per Bedroom Served	\$1200	5	\$6000
All Non-Heat Pump Systems	≥ 17 Gallons per Bedroom Served	\$1800	<input type="text"/>	\$0

Central HPWH

Previous Water Heating Source	HPWH Tank Size	Incentive for Equipment serving 2+ Apartments	Qty of Apts served	Total Incentive
All Non-Heat Pump Systems	< 17 Gallons per Bedroom Served	\$1200	5	\$6000
All Non-Heat Pump Systems	≥ 17 Gallons per Bedroom Served	\$1800	<input type="text"/>	\$0

Pool and Spa HPWH

Previous Water Heating Source	Pool Heater Type	Incentive for Equipment serving 2+ Apartments	Qty	Total Incentive
All Non-Heat Pump Systems	Heat Pump Pool Heating	\$2500	2	\$5000

HVAC Heat Pumps

Individual Apartment HVAC

Previous Space Heating Source	HVAC Type	Incentive for Individual Apartment / Per Compressor	Qty of compressors	Total Incentive
Non-Heat Pump Systems	Split or Packaged Rooftop/ Multi-position Heat Pump (Ducted or Ductless)	\$2000	1	\$2000
Non-Heat Pump Systems	PTHP, SPVHP, or unitary through the wall/ceiling Heat Pump, Single or Two Stage Compressor	\$500	5	\$2500
Non-Heat Pump Systems	PTHP, SPVHP, or unitary through the wall/ceiling Heat Pump, Variable Capacity/Inverter Driven	\$1000	<input type="text"/>	\$0

Central HVAC

Previous Water Heating Source	HPWH Tank Size	Incentive for Equipment serving 2+ Apartments / Per Apartment Served	Qty of Apts served	Total Incentive
Non-Heat Pump Systems	HP HVAC equipment serving multiple apts	\$1000	2	\$2000

Common Area HVAC

Previous Space Heating Source	HVAC Type	Incentive per Compressor	Qty	Total Incentive
Non-Heat Pump Systems	Split or Packaged Rooftop/ Multi-position Heat Pump (Ducted or Ductless)	\$1800	<input type="text"/>	\$0
Non-Heat Pump Systems	PTHP, SPVHP, or unitary through the wall/ceiling Heat Pump, Single or Two Stage Compressor	\$300	<input type="text"/>	\$0
Non-Heat Pump Systems	PTHP, SPVHP, or unitary through the wall/ceiling Heat Pump, Variable Capacity/Inverter Driven	\$800	<input type="text"/>	\$0

Individual Apt Electrical Upgrades

Apartment must be all electric post retrofit.

Previous Equipment	Upgrade Type	ITECH Incentive (per Apartment Receiving Electrical Upgrade)	Qty	Total Incentive
Undersized Apt. Electrical Infrastructure	Apt sub/panel, feeder, disconnect upgrade	\$1400	<input type="text"/>	\$0

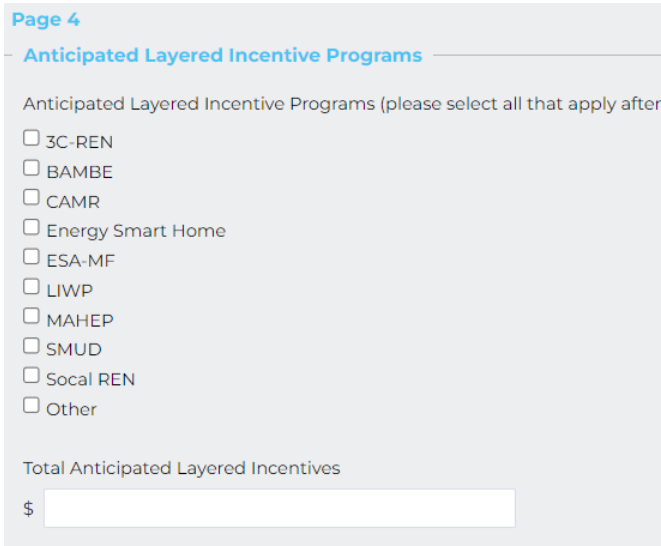
Total TECH Standard Incentive Reserved *

\$17500

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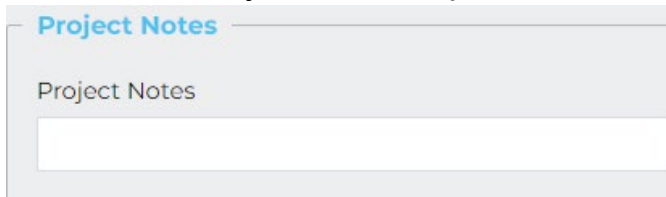
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9) Page 4: Select the Anticipated Layered Programs and enter the Total Anticipated Layered Incentive amount

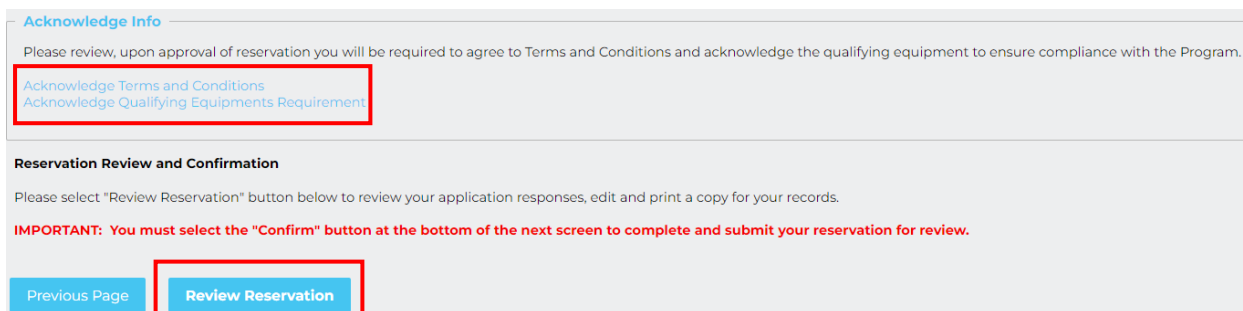


(note this field is optional at this stage).

10) Enter relevant Project Notes that you would like the TECH team to be aware of.



11) Click on 'Acknowledge Terms and Conditions' and 'Acknowledge Qualifying Equipment Requirements' to review the documents. Click 'Review Reservation' to review all information entered and to submit the form.



12) Last Page: An overview of all information entered on the reservation form will populate for your review. Scroll down to the bottom of the page and **click 'Confirm' to submit the reservation form.** You may also click 'Make a correction' to go back and update information or click 'Print this page' to print and save a copy before submitting.

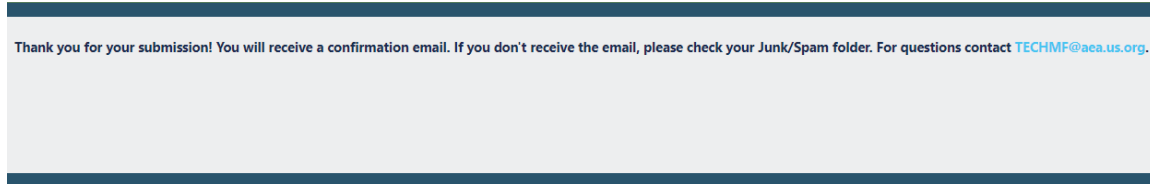
Reservation Review and Confirmation

Please select "Review Reservation" button below to review your application responses, edit and print a copy for your records.

IMPORTANT: You must select the "Confirm" button at the bottom of the next screen to complete and submit your reservation for review.



- 13) After clicking 'Confirm' a thank you message will appear and a 'TECH Multifamily Incentive Reservation Form: Received' email will be sent. If you don't receive the email, please check your Junk/Spam folder. We recommend adding/saving TECHMF@aea.us.org as an email contact to ensure you receive all program correspondence and to avoid important emails going to your 'Junk' folder.



Next steps:

1. TECH Team reviews reservation
 - If corrections are needed, the contractor is emailed a correction request link to update information and resubmit.
 - The contractor and property owner will be contacted by email to determine equity-eligibility.
2. Electronic signature links are emailed to the contractor and property owner.
 - After reservation is signed, another email is sent with a link to verify signatures.
3. TECH Incentive Manager completes final review of reservation.
4. Contractor and property owner are notified by email whether reservation is approved/not approved.
 - If approved, a copy of the reservation form, the program terms and conditions, and equipment requirements is provided.

Submitted reservations are not guaranteed incentives until approved by the TECH Incentive Manager.