

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 – Unitary Heat Pump Water Heater

Page 4: Qualifying Equipment Scope of Work – Central Heat Pump Water Heater

Page 5: Anticipated Layered Incentive Programs, Project Notes, and Acknowledgement of Terms and Conditions, Qualifying Equipment Requirements and Project Milestone Requirements

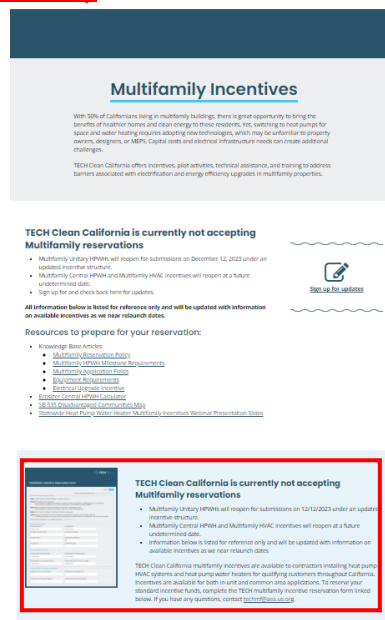
Confirmation Page: Review and Submit Reservation Form

Follow the steps in this document to complete and submit the form. **All form fields with a red asterisk * are required. Note, completed Ecosizer System reports are required to be uploaded for Central Heat Pump Water Heater reservations (<https://ecosizer.ecotope.com/sizer/annualsim/>)**


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 [TECH Public Reporting Multifamily Incentives \(techcleanca.com\)](#). An email announcement will be sent when the link is live)



- 2) **Page 1:** The TECH Multifamily Incentive Process appears at the top of the first page for your review.



Multifamily Incentive Reservation Form

Page: 1 2 3 4 5
☐ Save my progress and resume later | [Resume a previously saved form](#)

TECH Multifamily Incentive Process

Step 1: Initiate process to reserve funds by completing this form

Step 2: 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

Step 3: 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

Step 4: TECH Incentive Manager completes final review of reservation

Step 5: 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

If you have any questions or need assistance contact TECHMF@aea.us.org

- 3) Enter the Property Information:

Property Information

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

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

Property Meter Structure

Existing Space Heating Paid By * <div>Please select... ▼</div>	Proposed Space Heating Paid By * <div>Please select... ▼</div>
Existing Domestic Hot Water Paid By * <div>Please select... ▼</div>	Proposed Domestic Hot Water Paid By * <div>Please select... ▼</div>

5) Select Property Equity Incentive Eligibility (Required)

Upload supporting documents (Optional) **may also be emailed to TECHMF@aea.us.org after reservation is submitted*

Property Equity Incentive Eligibility

Please select all criteria that apply and represent this property. Select N/A if not applicable. *

☐ N/A

☐ At least 66% of the living units are 80% AMI or less

☐ Deed restricted housing or property with restrictive covenant

☐ At least 80% of the living units are 60% AMI or less

☐ Property is eligible for SOMAH

☐ Property is in Tribal Lands

If you have a Deed Restriction, Restrictive Covenant, Rent Roll, SOMAH Participation Agreement, or other documents to support Equity Incentive eligibility, upload here. Supporting documents may also be emailed to TECHMF@aea.us.org after reservation is submitted, be sure to reference the TECH Reservation ID number and/or Property Address.

[Choose File](#) No file chosen

6) Enter the Property Owner Company Information

Property Owner Company Information

Property Owner Company Name *

Property Owner Company City *

Property Owner Company Address *

Property Owner Company Zip Code *

7) 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 *

[Next Page](#)

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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- 8) **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 your company or information is incorrect, select ‘Add Contractor’ and complete the fields. (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 *

- 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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Next Page

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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10) **Page 3:** Enter Equipment Scope of Work for Unitary Heat Pump Water Heater. 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)
Only TECH measures with current funding are shown on this form, and TECH measures not shown are not available to be reserved at this time. Funding and reservation launch dates for other TECH measures will be announced when available. When funding for additional measures is available, they will be included on this form.

Heat Pump Water Heater (HPWH)
 Apartment Unitary HPWH
 Gas/Propane/Electric Resistance to HPWH

Sub-Category	Incentive for Individual Apartment	Qty of HPWHs	Total Incentive
< 55 Gallons	\$3100	<input type="text"/>	\$0
≥ 55 Gallons	\$3800	<input type="text"/>	\$0
Equity Eligible Adder	\$1085	<input type="text"/>	\$0
Low GWP Adder	\$700	<input type="text"/>	\$0

Undersized Apt. Electrical Infrastructure upgraded as part of Unitary HPWH Installation
 Apt subpanel, feeder, meter disconnect upgrade

Upgrade Type	TECH Incentive (per Apartment Receiving Electrical Upgrade)	Qty	Total Incentive
General market	\$2000	<input type="text"/>	\$0
Equity	\$4000	<input type="text"/>	\$0

Total TECH Standard Incentive Reserved * \$0

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11) **Page 4:** Enter Equipment Scope of Work for Central Heat Pump Water Heater. First, select the ‘Amount of Systems’.

Multifamily Incentive Reservation Form

Page 4
**Central MF HPWH
 (Load Shift Optimized System)**

Amount of systems

Please select... ▼

Please select...

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

- 12) Next, for each system you're required to enter the kWh, Number of apartments served, and upload the system's Ecosizer Incentive Calculator Results Report. Optionally, you can select the Equity Eligible Adder or Low GWP Adder if eligible.

Page 4
Central MF HPWH
(Load Shift Optimized System)

Amount of systems
1

System 1
Gas/Propane/Electric Resistance to HPWH

Sub-Category	Incentive for Equipment serving 2+ Apartments	kWh	Number of apartments served	Total Incentive	Attach this System's Ecosizer Incentive Calculator Results Report
Base Rebate	\$900 per kWh	10		\$9000	Choose File No file chosen
Equity Eligible Adder	\$100 per kWh	<input type="checkbox"/>			
Low GWP Adder	\$200 per kWh	<input type="checkbox"/>			

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- 13) **Page 5:** Select the Anticipated Layered Programs and enter the Total Anticipated Layered Incentive amount. (Optional)

Anticipated Layered Incentive Programs

Anticipated Layered Incentive Programs (please select all that apply after)

- ☐ 3C-REN
- ☐ BAMBE
- ☐ CAMR
- ☐ Energy Smart Home
- ☐ ESA-MF
- ☐ LIWP
- ☐ MAHEP
- ☐ SMUD
- ☐ Social REN
- ☐ Other

Total Anticipated Layered Incentives

\$

Project Notes

Project Notes

- 14) Enter relevant Project Notes that you would like the TECH team to be aware of. (Optional)

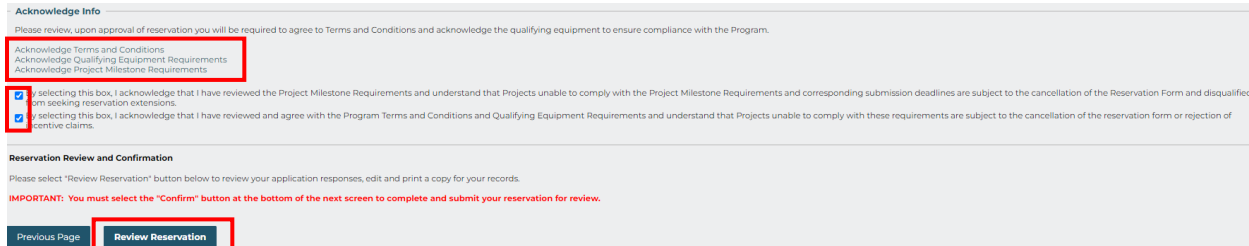
Project Notes

Project Notes

15) Check the boxes and click on the links to review and agree to the:

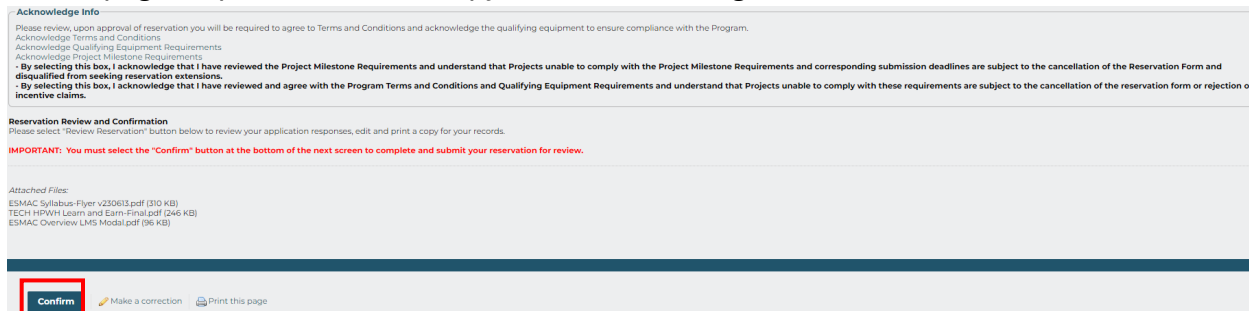
- Acknowledge Terms and Conditions
- Acknowledge Qualifying Equipment Requirements
- Acknowledge Project Milestone Requirements

Click 'Review Reservation' to go to the last page.

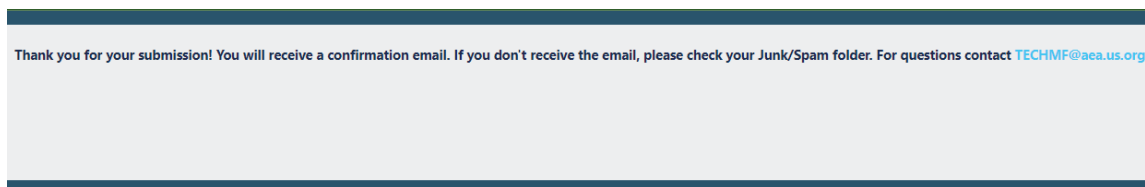


16) **Confirmation Page:** An overview of all information entered on the reservation form will populate for your review. Scroll down to the bottom of the page and **click 'Confirm' to submit the reservation form.**

- 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.



17) 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 reservations in the order they are received
 - If corrections are needed, the contractor and property owner will be notified by email. The contractor is responsible for making corrections and their email will include a correction request link to update information and resubmit.
 - The contractor and property owner may 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, equipment requirements, and Project Milestone Requirements is provided.

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