TECH Clean California Project Checklist

This checklist is provided as a reference and includes the key items to remember when scoping and completing a project you intend to submit for a TECH Clean California rebate. We suggest you print this out for all technicians interacting with customers to ensure everyone knows the required data to collect, and steps to take to ensure that the application is accepted.

Project Requirements

Project Scoping Phase

- ☐ Determine if the project is single-family or multifamily
- ☐ Provide TECH customer-facing T&Cs along with existing contract (Exhibit B of the TECH Trade Professional Participation Agreement. Exhibit B may be attached to the invoice or, preferably, embedded into the contractor's T&Cs.)
- ☐ Look up incentive amount using the Rebate Zip Code Lookups found at switchison.org/contractors/incentive-resources. The incentive must be listed on the invoice to the customer
- ☐ Confirm equipment will qualify by checking Qualified Products List, included at switchison.org/contractors/incentive-resources
- ☐ Multifamily only: submit a reservation form, found at energy-solution.com/tech-incentives/multifamily

Project Execution Phase

- ☐ Note the data required for application
- ☐ Obtain permit
- ☐ Take pre-install photos

Post-Installation Phase

- ☐ Capture post-install photos, clearly showing nameplate
- ☐ Ensure that invoice includes incentive amount and copy of customer-facing T&Cs
- ☐ Complete required HERs testing (HVAC only)

Application Data Requirements: Heat Pump Water Heating Projects

All HPWH Claims – The following fields will be included on the HPWH incentive application form:

- ☐ **Site**
  - ☐ Customer name
  - ☐ Customer address
  - ☐ Customer email
  - ☐ Customer phone number
  - ☐ Facility type (single-family vs. multifamily)
    - If multifamily: affordable housing? (Y/N)
  - ☐ Electrical panel capacity
    - If a panel upgrade was completed, please provide the pre-existing and post-upgrade capacities in Amps
- ☐ **Equipment Information**
  - ☐ Manufacturer
  - ☐ Model
  - ☐ Serial #
  - ☐ Previous unit information (fuel type, tank size, product type)
- ☐ **Photos**
  - ☐ Pre-installation photos showing evidence of previous unit fuel type
  - ☐ Post-installation photos
    - Clear photo of nameplate
    - Capped gas line
    - Temperature pressure relief valve and drain lines
    - Hot and cold water lines
    - TMV (if included)
    - Electrical disconnect switch Electrical Panel
  - ☐ Invoice showing Exhibit B attached or embedded in contractor's T&Cs
- ☐ **Installation Details**
  - ☐ Location unit was installed (free form entry)
  - ☐ Invoice #
  - ☐ Invoice total
  - ☐ Invoice date
  - ☐ HPWH installation cost
  - ☐ Installation start date
  - ☐ Installation end date
  - ☐ Permit #
  - ☐ Mixing valve installed (Y/N)
  - ☐ Condensate required (Y/N)
  - ☐ Panel upgrade required (Y/N)
  - ☐ Was the unit pre-programmed to run on customer time-of-use schedules?
  - ☐ Other infrastructure upgrades associated with installation (free form entry)
  - ☐ What operating mode was the unit commissioned in? (Heat Pump/Hybrid/Electric/Vacation)
- ☐ **Other**
  - ☐ Is the customer/contractor applying for additional incentives? (If so, what is the amount of total incentives being applied for?)
  - ☐ Did you enroll the customer in a utility HPWH program? If so, what program?

Application Data Requirements: Heat Pump HVAC Projects

All HP HVAC Claim Forms

- ☐ **Site**
  - ☐ Customer name
  - ☐ Customer address
  - ☐ Customer email
  - ☐ Customer phone number
  - ☐ Facility type (single-family vs. multifamily)
  - ☐ Electrical panel capacity
  - ☐ Home square footage
- ☐ **Equipment Information**
  - ☐ Manufacturer
  - ☐ Model
  - ☐ Serial #
  - ☐ Number of units
  - ☐ Previous AC model # (if applicable)
  - ☐ Previous AC type (Room Unit, Central, None)
  - ☐ Previous/existing furnace model number (if applicable)
  - ☐ Previous/ Existing furnace fuel type (Gas, electric resistance, propane, or other)
    Note, fuel types such as wood burning furnaces would be categorized under "Other"
- ☐ **Photos**
  - ☐ Pre-installation photos, including equipment nameplate if legible and/or any photos that can clearly show the previous unit fuel type
  - ☐ Post-installation photos
    - Clear photo of equipment nameplate
    - Capped gas line (if applicable)
  - ☐ Electrical Panel
  - ☐ Approved CF-3R

Photos, continued

  - ☐ Invoice, which must include the following information:
    - Customer site address
    - Equipment manufacturer & model number
    - Incentive amount
    - A copy of Exhibit B of the TPPA, which was provided to the customer
- ☐ **Installation Details**
  - ☐ Invoice #
  - ☐ Invoice total
  - ☐ Invoice date
  - ☐ HP HVAC installation cost
  - ☐ Installation start date
  - ☐ Installation end date
  - ☐ Permit #
  - ☐ What was done with the furnace (if applicable)
    - Fully decommissioned
    - Setup to run in emergency scenarios only
    - Setup to use the blower only
  - ☐ Was a smart thermostat also included?
  - ☐ Were Manual-J/Manual-D calculations completed?
  - ☐ Was a full system performance report completed?
  - ☐ Other building infrastructure upgrades associated with installation (free form entry)
- ☐ **Other**
  - ☐ Is the customer/contractor applying for additional incentives? (If so, what is the amount of total incentives being applied for?)

Enhanced HP HVAC Claim Forms – The following fields are required in addition to the above inputs for all projects claiming enhanced incentives:

- ☐ **Installation Details**
  - ☐ Duct replacement required (Y/N)
  - ☐ Duct sealing required (Y/N)
  - ☐ Panel upgrade required (Y/N)
- ☐ **Photos**
  - ☐ Manual-J/Manual-D calculations (if completed)
  - ☐ ASHRAE 221-2020 Full Systems Performance report, showing HSPr or CSPr greater than or equal to 80% (if completed)
  - ☐ CF-3R MCH Duct testing report, showing 5% leakage or less (if completed)