

# Checklist for Single Family Homes and Small Businesses

This checklist includes key items to remember when scoping and completing a single family project or small business (defined below) project for a TECH Clean California heat pump water heater incentive. We suggest printing this checklist out for all customer-facing technicians to reference. This will help ensure all parties collect the necessary data and complete the required steps for the application to be accepted.

### Pre-Installation Phase

#### Confirm Eligibility:

- For a small business project (which includes any non-residential, non-multifamily project using the same heat pump water heater qualified product list as single family), ensure that the project is eligible based on location. Please reference the Qualifying Building Types & Customers article on the [Contractor Knowledge Base](#) or search the zip code on the [Search Incentives tool](#). Unlike residential incentives, there are some limited areas of the state where commercial incentives are not available.
- For a single family project, check whether the customer qualifies for Equity incentives based on their income. See [Equity incentives page](#) for more details.
- Confirm that the equipment for the project meets eligibility requirements, by checking the [Qualified Products List here](#).

**Panel Capacity:** Confirm the panel has adequate amperage to support the heat pump water heater. It is often possible to fully electrify a home on less than 200 amps! Please review our [Knowledge Base article](#) on this topic to find strategies to optimize a customer's panel to avoid upgrades.

**Incentive Amount:** Inform the customer of the total incentive amount expected for the project.

**Provide Demand Response Enrollment Education:** Inform the customer about the demand response enrollment requirement and direct them to the list of program options listed on the [TECH Program Terms & Conditions](#) and the [What to Know About Demand Response & Time-of-Use Rates Flyer](#). Recommend any option(s) that you think will work best for the customer. Make sure to verify they chose and enrolled in a program by the time your installer arrives (the incentive claim will ask which program they enrolled in).

**Signatures:** Collect the customer's signature on the TECH Program Terms & Conditions. Customer must agree to be enrolled on a time-of-use rate by their utility. Customer must also agree to enroll in a demand response program.

- Ensure customer has checked required boxes and correctly entered their utility account number. Claims submitted with inaccurate account numbers will face processing delays.

**Obtain permit:** A permit number is required, but the permit does not need to be closed at the time of application submission. (Permits can be obtained after installation if it is an emergency replacement situation).

**Sizing:** For residential Unitary projects (single family and multifamily), **heat pump water heaters must be sized at a minimum to meet California Plumbing Code First Hour Rating** (larger is encourage) – Please follow manufacturer sizing guidelines and double check that the size recommendation meets the plumbing code minimum. We will request number of bedrooms and bathrooms on the incentive claim form and cannot approve incentives for undersized heat pump water heaters.

*See next page for size recommendations.*

## Size Recommendations

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

## Project Execution and Installation Phase

- Data:** Collect all data required for the incentive claim. For a full list of fields, please see the Knowledge Base article titled [Single Family and Small Business HPWH Claim Fields](#).
- Photos: Take pre-installation photos featuring:**
  - Prior water heater showing equipment name plate
  - Electric meter showing meter number and utility (can take pre- or post-installation)
  - Please see [this article](#) for guidance on capturing an electric meter photo.
- Photos: Take post-install photos:**
  - Newly installed heat pump water heater showing name plate (model and serial number must be legible)
  - Close up image showing installed thermostatic mixing valve (not required if integrated into system)
  - Electric meter showing meter number and utility (can take pre- or post-installation)
  - Zoomed-out image(s) featuring:
    - Capped gas line
    - Hot- and cold-water lines, insulated, first five feet from the tank
    - Heat pump water heater earthquake strap
    - Temperature pressure release valve
    - Condensate drain line, and where it's being drained to
- Time-Of-Use Set Up:** After installing the heat pump water heater, set it to follow a time-of-use rate and take a screenshot or photo from the manufacturer app and upload it to the incentive claim. For instructions on how to do this, and the correct photo to capture, please see the Knowledge Base Article titled [HPWH Installation Requirements and TOU Setup Info](#). **Please Note: All heat pump water heaters installed must be configured to time-of-use rate.**
- Invoice:** Ensure the invoice includes TECH Clean California incentive amount, total project cost pre-incentive, and equipment model number.



Visit the TECH Clean California Contractor Knowledge Base for a searchable source of all program rules and information: [frontierenergy-tech.my.site.com/contractorsupport/s](https://frontierenergy-tech.my.site.com/contractorsupport/s).



Find program information and details on demand response, time-of-use, and equity incentives at [switchison.org/techcleanca/hpwh-incentives](https://switchison.org/techcleanca/hpwh-incentives).



**For any additional questions, please reach out to [tech.contractor@energy-solution.com](mailto:tech.contractor@energy-solution.com).**

*Energy Costs and Energy Use: It's important for you to know that by switching to a heat pump you may or may not see savings on your energy bill. Please visit [techcleanca.com/hpwh-energy-costs](https://techcleanca.com/hpwh-energy-costs) to learn more about the factors to consider when upgrading to a heat pump and how to help lower your energy bill.*