

TECH Contractor Knowledge Base

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Customer Terms & Conditions and Invoice Requirements

🕒 Jul 18, 2025 Knowledge

Answer

Customer Terms & Conditions and Invoice Requirements

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TECH Clean California Customer Agreement to Program Terms & Conditions Requirement

Overview

All customers who receive an incentive through TECH Clean California must also receive and sign a copy of the TECH Customer Terms and Conditions, which is included as Exhibit B of the TECH Clean California Trade Ally Participation Agreement **and available as a standalone fillable PDF here**

(<https://frontierenergy->

[tech.my.salesforce.com/sfc/p/5f000003GyZS/a/RO0000004ezl/RxuGQeD8nWiu.lshvZn7AKzg36JfJcrhPElw_kDFxoQ](https://frontierenergy-tech.my.salesforce.com/sfc/p/5f000003GyZS/a/RO0000004ezl/RxuGQeD8nWiu.lshvZn7AKzg36JfJcrhPElw_kDFxoQ)).

The most up to date version must be used when creating a new claim. Please see the chart below indicating what version is allowed:

T&C Version (in Footer of document)	Requirement by Product Type	Range of Claim Creation Dates Allowed
v250710 OR v250716 <i>(this version fixed the previous issue of the signature lines populating the same signature in multiple locations).</i>	HP HVAC, AWHP, and HPWH claims	Starting July 15, 2025



10_23_2024 OR v241202 (this file version is a fillable PDF) *	HP HVAC and HPWH Claims	Claims created on or after the respective program launch dates <i>HP HVAC:</i> Claims created 11/12/2024 through 1/17/2025 <i>HPWH:</i> Claims created 12/10/2024 through: <ul style="list-style-type: none">• 1/17/2025 (for non-SMUD POU's)• 2/24/2025 (for all IOUs + SMUD)
8_22_2024	Old HPWH Claims	HPWH Claims created 9/10/2024 through 12/10/2025

*Please note that we do not have non-English customer T&Cs available at this time, but we will have them available soon.

Iris Upload Requirement

The signed T&Cs must be uploaded into pre-approval (reservation request) forms via Iris.

Our team will be reviewing the document. The customer must have acknowledged the terms around enrolling into a demand response (DR), time-of-use (TOU), and heat pump water heater rewards program. Please note that TOU and heat pump water heater rewards program acknowledgements are only required for HPWH claims.

If the T&Cs are not fully filled out, we will have to reject the claim and ask you to upload an updated copy from the customer (provided funding is available). **As a contractor, make sure you confirm the customer has checked all the required boxes and entered all the required information on the T&Cs.**

How to Fill Out the T&Cs

Section 1 (For All Project Types)

Attesting to enroll in an eligible demand response program



All customers must check this box to receive a TECH incentive, since demand response enrollment is required for all project types.

To participate in the Program, the Account Holder must confirm that they agree to the following by checking the box below:

☐ I, the Account Holder or authorized representative of the Account Holder, understand and agree that I am either already enrolled in or will enroll in a Qualifying Demand Response Program for three years, if one is available to me.

Section 2 (For HPWH Projects Only).

Confirming Enrollment in Time-of-Use and Water Heater Rewards

Only customers with an HPWH installed must check this box to receive their TECH incentive, as water heater rewards enrollment is required for HPWH installations, when available in the customer's area.

Section 2: Heat Pump Water Heater Terms and Conditions

Water Heater Rewards Program Enrollment Requirement:

This requirement applies ONLY to Single Family Unitary Heat Pump Water Heater projects.

Water heater rewards programs help participants take advantage of lower-cost electricity pricing during the day. Participants earn rewards for enrolling and allowing the program to shift their water heater's electricity usage to times when electricity prices are lower.¹ You may visit switchison.org/techcleanca/hpwh-incentives to learn more about this requirement. Currently, there are water heater rewards programs available to:

- Customers who receive their electric bill from PG&E or SCE.
- Customers of San Diego Community Power.

Community Power customers are also SDG&E customers. To verify if you are a Community Power customer, review the "Summary of Current Charges" section on page one of your SDG&E bill. Below this section, the bill will state, "Your electric energy is provided by SAN DIEGO COMMUNITY POWER".

To participate in the Program, the Account Holder must agree to the following and check the box below:

☐ (Required) I, the Account Holder or authorized representative of the Account Holder, understand and agree that I will apply to the water heater rewards program available to me using the resources provided directly below, if one is available in my area. I agree to permit the TECH Clean California program to share my TECH Clean California project information with the relevant water heater rewards program to help process my enrollment in that program. I agree that I can be contacted by the water heater rewards program available to me to complete my enrollment and connect my water heater.

Only customers having a HPWH installed must check this box to receive their TECH incentive, since time-of-use rate enrollment is required for HPWH installations, when available.

The Account Holder or authorized representative of the Account Holder must check the box below to acknowledge the time-of-use rate enrollment requirement. Please visit switchison.org/techcleanca/time-of-use-rates to learn more about the time-of-use rate options available.

☐ I, the Account Holder or authorized representative of the Account Holder, understand and agree that either I am already on a time-of-use rate plan or, if my electric utility is listed on the website above, I will enroll myself on a time-of-use rate plan if I am not already on one.



Providing the Customer's Electric Account Number

In Section 2 of the T&Cs, the account holder must provide their electric account number if they are an electric customer of PG&E, SCE, SDG&E, or SMUD. The specific number required for varies by utility.

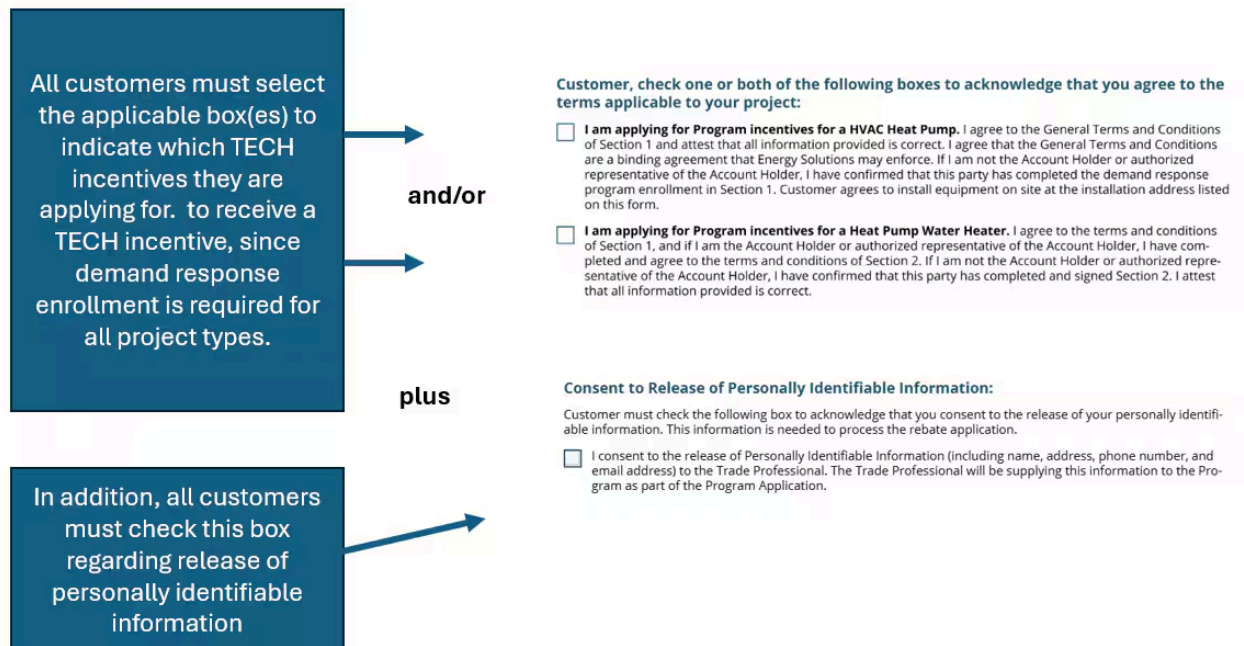
Please see the appendix of this article for example bill photos which highlight the account number needed by utility.

It is critical to ensure that the customer provided the correct number and that as the contractor, you provide that same number in Iris.

If you are comfortable asking for a copy of the customer's electric bill, you could pre-fill the correct account number in for the customer or review for account number accuracy.

Section 3 (For All Project Types)

Customer Acknowledgement and Signatures



Appendix A (For tenant-occupied units)

Acknowledgment of the Tenant Protection Notice



The property owner and tenant must both acknowledge the tenant protection notice by signing the areas shown below.

Tenant acknowledges receipt of the Tenant Protections Notice provided above.

Property Owner Signature:

Full name:

Date:

Tenant Signature:

Full name:

Date:

Invoice Requirements

Required Information on the Invoice

Below are the required fields to be listed on a customer invoice:

- Site address
- Equipment information, including manufacturer and model number of installed equipment.
- Total cost pre-incentive
 - Please note that the balance must be paid in full. We will not accept invoices with remaining balances.
- TECH Incentive amount (as applicable)
 - TECH incentive must be listed as a line item on the invoice either directly reducing the cost (recommended) or specified to be supplied to the customer after being received by a participating contractor.
- TECH Incentive Passthrough Method ([see below](#))

The entire incentive amount must be listed on the invoice. Although TECH Clean California does not regulate the amount of fees a contractor may take out, they must be clearly listed. For example, if the project is eligible for \$1,000 in incentives and the contractor wants to deduct \$200 in fees, the contractor must put \$1,000 on the invoice and fees as another line item.

Please note that heat pump HVAC projects will also be required to provide an itemized statement of work document in the Iris claim form. For more information about this requirement, please see [this article](https://frontierenergy-tech.my.site.com/contractorsupport/s/article/itemized-statement-of-work) (<https://frontierenergy-tech.my.site.com/contractorsupport/s/article/itemized-statement-of-work>).

Incentive Passthrough Method

The incentive must be passed down 100% from the contractor to the consumer. It can either be passed along as either an instant discount deducted from the total project cost at the time of customer payment or provided to the customer in the form of a check or other payment method after the contractor receives the incentive.

Within the TECH Clean California Trade Professional Participation Agreement (TPPA) it states:

“The following information must be included on invoices to Qualifying Customers...If incentive is passed through at point of sale or will be passed down within 30 days of the incentive being received by the contractor.”

If the incentive is not passed to the customer (homeowner) within this 30-day time frame, contractors are in violation of the TPPA agreement, which is grounds for suspension or termination from the TECH Clean California and the HEEHRA rebate programs. Please note that this timeline starts once the contractor receives the check.

These requirements will be reviewed prior to payment being sent out. We recommend the instant pass-through option from the customer experience standpoint.

Invoice Requirements and Details for Rental Situations

Although some of these requirements may be the same for renters and property owners, we would like to clarify the below distinctions for transparency purposes:

- The **customer name** on the claim form must match the customer name shown on the invoice.
- The **person who signs “Section 3: Acknowledgement and Signature”** is the customer – this should match the claim for and invoice name.
- The **utility account holder** (or permission to sign on their behalf) needs to sign **“Section 1: General Terms and Conditions”** and **“Section 2: Heat Pump Water Heater Terms and**




Conditions” to agree to the TOU and water heater rewards enrollment. In most rental scenarios that will be the tenant but could be the landlord as well.

- **For equity incentives:** if the landlord is paying for the installation of the new equipment and the tenant qualifies for the equity incentive amounts, the landlord can receive the available incentive.

Appendix: Instructions for Collecting Correct Account Numbers and Meter Numbers

SOUTHERN CALIFORNIA EDISON (SCE)

Collect the “Service Account” number (NOT “Customer Account” number) – page 1. This number is up to 13 digits long.



**SOUTHERN CALIFORNIA
EDISON®**
An EDISON INTERNATIONAL® Company

Go paperless at www.sce.com/ebilling. It's fast, easy and secure.

For billing and service inquiries call
1-800-XXX-XXXX
www.sce.com

Your electricity bill

VALUED CUSTOMER / Page 1 of 4

Customer account ✗
2-00-000-0000

Service account ✓
3-000-0000-00
00 ANY DR
ANY CITY, CA 90000

Rotating outage
Group N001

Date bill prepared
03/14/18

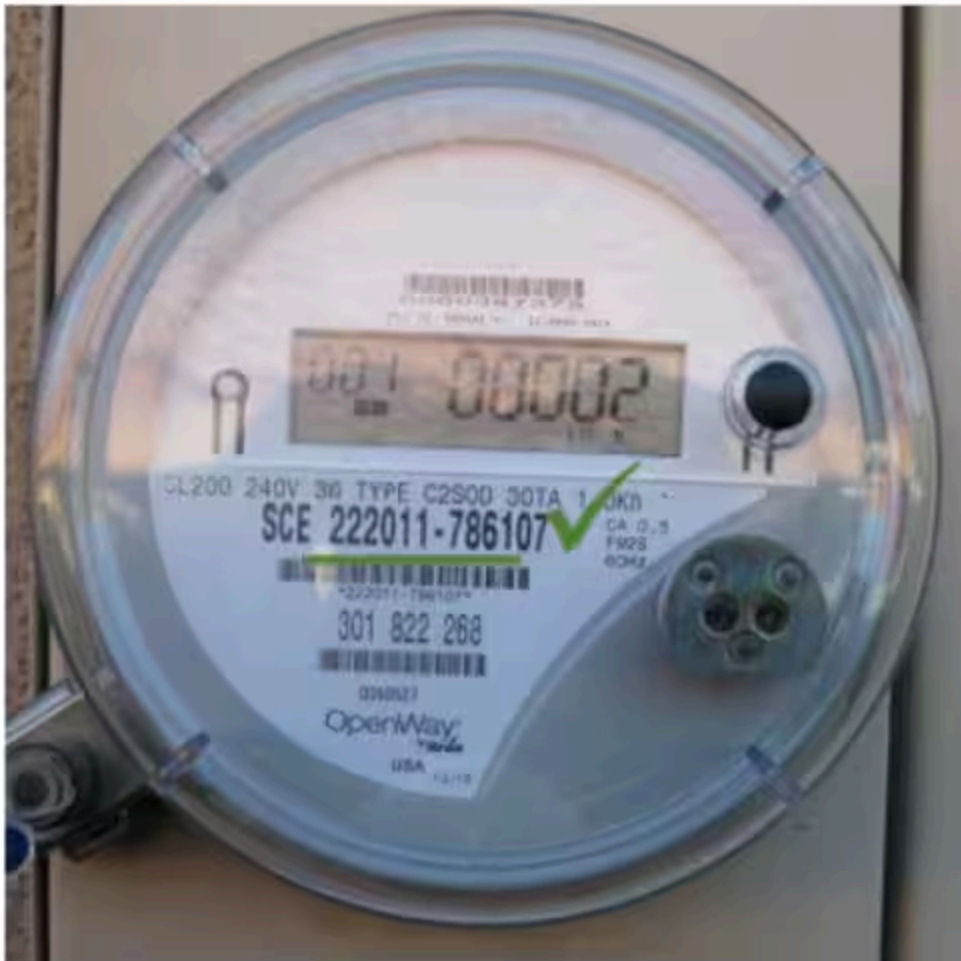
1 **Amount Due \$33.24**
Due by 04/02/18

Your account summary

Previous Balance	\$30.28
Payment Received 02/16/18	-\$30.28
Balance forward	\$0.00
Your new charges	\$33.24
Total amount you owe by 04/02/18	\$33.24

Source: <https://www.sce.com/customer-service/my-account> (<https://www.sce.com/customer-service/my-account>)






PACIFIC GAS & ELECTRIC (PG&E).

Collect the "Service Agreement ID" – under "Details of Electric Charges". This number is 10 digits long.



Page 3: Details of electric charges



ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 1023456789-0

Statement Date: mm/dd/yyyy

Due Date: mm/dd/yyyy

16 Details of Electric Charges

01/20/2022 - 02/17/2022 (29 billing days)

Service For: 1234 MAIN STREET

Service Agreement ID: 9876543210

Rate Schedule: Time-of-Use (Peak Pricing 4 - 9 p.m. Every Day)

Enrolled Programs: CARE (Renew by 12/08/2023)

17 Service Information

Meter # 987654321X

Total Usage 180.152400 kWh

Baseline Territory S

Heat Source B - Not Electric

Serial Y

Rotating Outage Block 50

Your CARE usage is charged at these rates (\$/kWh). Differences may occur due to rounding.

01/20/2022 - 02/17/2022

Peak 0.22808

Off Peak 0.21680

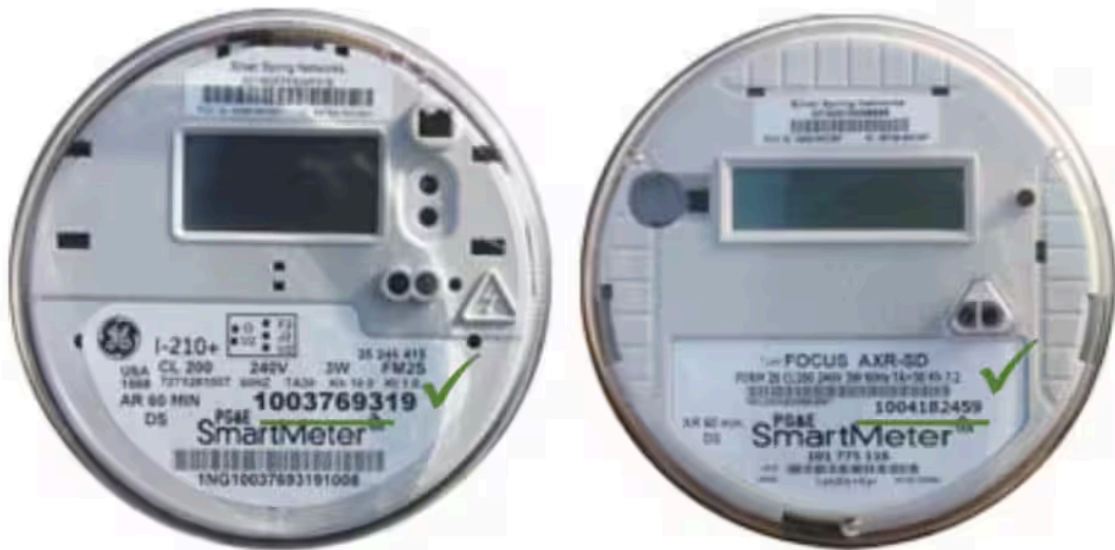
Baseline

Credit -0.05338

18 01/20/2022 - 02/17/2022

Baseline Allowance	321.90 kWh	(29 days x 11.1 kWh/day)	
Energy Charges			
Peak	64.375700 kWh	@ \$0.35064	\$22.57
Off Peak	115.776700 kWh	@ \$0.33331	38.59
Baseline Credit	180.152400 kWh	@ -\$0.08206	-14.78
CARE Discount			-16.21
Energy Commission Tax			0.06
Fairfield Utility Users' Tax (2.000%)			0.00
Total Electric Charges			\$30.82


Source: <https://www.pge.com/en/account/billing-and-assistance/understand-your-bill.html>
<https://www.pge.com/en/account/billing-and-assistance/understand-your-bill.html>



SAN DIEGO GAS & ELECTRIC (SDG&E)

Collect the "Account Number" – page 1. This number is up to 10 digits long:





SDGE
Semptra Energy

ACCOUNT NUMBER **1234 567 890 6** ✓

DATE DUE
Apr 22, 2018

DATE MAILED Jul 31, 2018

sdge.com

Page 2 of 5

Detail of Current Charges

Electric Service

Rate: Time of Use Plus - TOU-A-P-Commercial Climate Zone: Inland

Billing Period: 6/27/18 - 7/29/18 Total Days: 32

Meter Number: **06137555** ✓ (Next scheduled read date Aug 28, 2018) Cycle: 20

Meter Constant: 1.000 Billing Voltage Level: Secondary

Circuit: 0551 Your circuit is currently not subject to rotating outage. However, this is subject to change without notice.

Total Usage: 7.279 (Usage based on interval data)

ELECTRIC CHARGES	Amount(\$)
Customer Charge	10.00

Important Phone Numbers

1-800-336-SDGE (7343) English
1-800-311-SDGE (7343) Español
1-877-889-SDGE (7343) TTY

M-F, 7am-8pm, Sat, 7am-8pm

For emergencies and to report outages, please call 24 hours a day, 7 days a week. **1-800-611-7343**

To locate underground cables & gas pipes, please call DigAlert, Monday-Friday, 8am-7pm. **8-1-1**

To make a payment using your credit or debit card via a third party vendor, call. **1-800-386-0067**

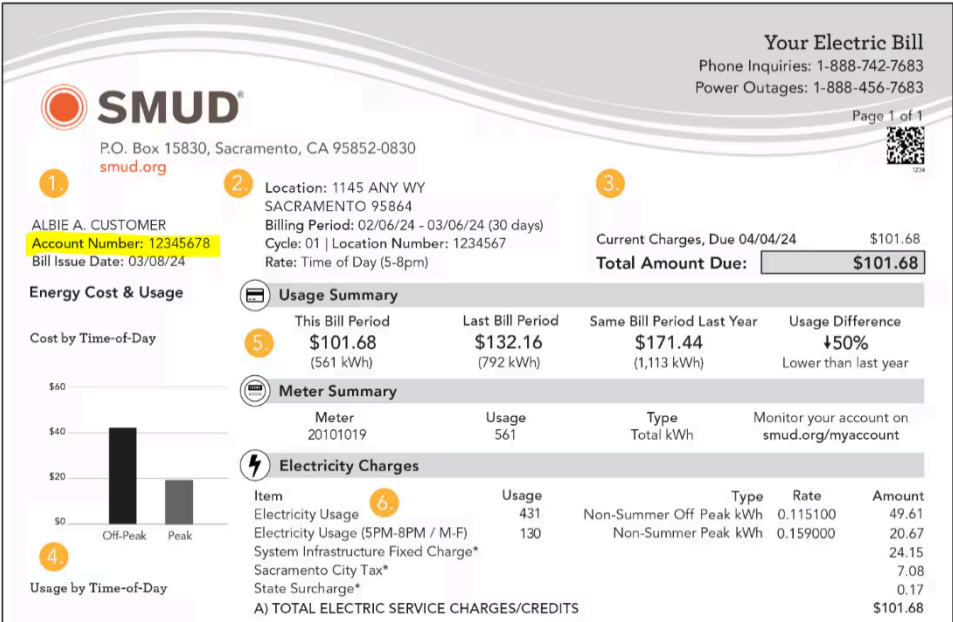
Source: <https://www.sdge.com/bill> (<https://www.sdge.com/bill>).



SACRAMENTO MUNICIPAL UTILITY DISTRICT (SMUD)

Collect the "Account Number" - page 1. This number is up to 10 digits long:





Source: <https://www.smud.org/en/Customer-Support/Understand-Your-Bill>
(<https://www.smud.org/en/Customer-Support/Understand-Your-Bill>)

Title
Customer Terms & Conditions and Invoice Requirements

URL Name
Contractor-Invoice-Customer-Agreement

Article Total View Count
6,118

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Incentive Information And Require...
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✓ Yes

✗ No

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Contact Support

