

# TECH Contractor Knowledge Base

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## Heat Pump HVAC Incentives - Single Family

🕒 Jul 18, 2025 Knowledge

### Answer

## Heat Pump HVAC Incentives - Single Family.

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## **Overview**

TECH Clean California (<https://techcleanca.com/>) provides incentives for a wide range of scenarios where a customer is converting to a heat pump to provide a primary or sole source of heat. For more information about TECH Clean California's program history and updates, please see [this article \(https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Previous-TECH-Updates\)](https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Previous-TECH-Updates).

## **Participation Requirements**

### **Eligible License Types**

Contractors who carry a B-General or C20 license are eligible to participate. *See more details about the enrollment process in our “[Program Enrollment Overview and Instructions](https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Contractor-Insurance-Requirements)” (https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Contractor-Insurance-Requirements), article.*

### **Program Enrollment**

#### **Contractors Brand New to TECH Clean California:**

- Contractors new to TECH must complete enrollment and training requirements. Begin by joining [The Switch Is On Pro Network \(https://www.switchison.org/pros%22%20/t%20%22\\_blank\)](https://www.switchison.org/pros%22%20/t%20%22_blank).
- Our team will contact you with further instructions once we have received your enrollment form.

#### **Returning Contractors:**

- Contractors who participated in TECH HP HVAC during 2023-2025 will retain their existing enrollment status.
- No new training or participation agreement is required, but contractors **must** review and follow all updated program rules.



## **Project Eligibility**

### **Eligible Building Types**

Individual single family residences, including:

- A residential property with a maximum of one dwelling units.
- An accessory dwelling unit (ADU).
- An individually owned mobile or manufactured home that:
  - Is on a foundation.
  - Does not have an axle or license plate.

Multifamily projects are those that involve 2 or more units. This includes condos and duplex/triplex/etc. For more details about multifamily incentive opportunities, please visit [TECH Clean California Public Reporting | Multifamily Incentives](https://techcleanca.com/incentives/multifamily-information/). (<https://techcleanca.com/incentives/multifamily-information/>).

### **Eligible Project Types**

#### ***Eligible Replacement Scenarios***

The customer must be replacing a non-heat pump system with a qualifying heat pump HVAC system, including, but not limited to:

- Central furnaces
- Wall furnaces
- Forced air furnaces
- Electric baseboard furnaces
- Radiant heating (as long as heat source is not a heat pump)
- Electric resistance heaters
- Wood burning stove/fireplace
- Oil heaters
- Pellet burning stove
- Electric stand-alone fireplace (if not plug-in)
- Freestanding propane stoves (if not plug-in)
- Space heaters
- Customers do not need to have an existing air conditioning unit to qualify. The installed heat pump must be sized to provide the majority of heating and cooling to the home.

#### ***Maximum Units Per Household***

On the application please only provide the quantity and serial numbers for all outdoor units, not indoor units. A single outdoor/indoor pairing is considered a quantity of "1."



### TECH Incentive Unit Limit

Replacement Situation	Number of Incentives Received
1 furnace replaced with 2 outdoor units	2 incentives
1 furnace replaced with 1 outdoor unit	1 incentive
2 furnaces replaced with 1 outdoor unit	1 incentive
1 furnace replaced with 3 outdoor units	2 incentives

### Eligible Project Dates

- Projects initiated on or after July 15 are eligible.
  - Project initiated or invoiced before July 15, 2025, will not qualify.
- The TECH Customer Terms and Conditions (<https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Contractor-Invoice-Customer-Agreement>) document must be signed on or after July 15, 2025
  - You must use the new version of the TECH Customer Terms and Conditions (updated on July 15th.)
  - We cannot accept old versions of the T&Cs, nor can we accept T&Cs uploads with missing pages and/or sections.
  - You can find previous and now outdated versions of the Terms and Conditions document in the Knowledge Base article entitled "Customer Terms & Conditions and Invoice Requirements" (<https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Contractor-Invoice-Customer-Agreement>).
  - Please note, there is a new Tenant Protections Requirement shown in the T&Cs document. Read more [here](#).
- Please note that we continue to allow for resubmission of reservation requests (pre-approvals) that were previously rejected due to insufficient funding and had an original submission date of January 17, 2025 or earlier (as noted on [4/21/25 \(https://mailchi.mp/frontierenergy/h10148481pwh-10158770\)](https://mailchi.mp/frontierenergy/h10148481pwh-10158770)).

### Qualifying Equipment



## Air-Source Heat Pumps

Newly installed heat pump systems must meet the following requirements at the time that the pre-approval is submitted to Iris:

2-stage and variable capacity systems that are ENERGY STAR® **listed** are eligible for TECH incentives.

- **NEW: You must now enter in the ENERGY STAR® ID in the Source ID section in Iris, NOT the AHRI number.**
- If you submit the AHRI number, a flag will be placed on your claim, and you'll be asked to update the claim with the ENERGY STAR® ID.

Materials				
ID	Mfgr	Model	Quantity	Serial
<div>Add Material</div> <p>This program supports a maximum of 1 material(s) row per claim (unlimited quantity).</p>				

Add Material to Claim

Material lookup helper (or enter Source ID below)

\* Product Type

Select...

\* Source ID

Enter Source ID directly, or use helper above.

\* Quantity

Whole numbers only

\* Serial Numbers

Enter one serial for each in Quantity, comma-separated.

Add This Material to Claim

Cancel

For split systems,

- 2-part systems (indoor and outdoor units) - must be AHRI-listed and ENERGY STAR® -listed together, not just the individual components or just the outdoor unit without the indoor unit. Mix-and-matched systems must be rated together to qualify – **custom pairs are not eligible.**
- 3-part systems (indoor unit, fan coil/air handler, and *new furnace*) are not eligible. If installing an indoor and outdoor unit alongside a *pre-existing furnace*, the 2-part matched pair (with both the indoor and outdoor units AHRI-listed and ENERGY STAR-listed together) should be provided



## **Dual Fuel Requirements**

New furnaces installed alongside the heat pump or hybrid heat pumps are not eligible. TECH allows a heat pump to be placed on top of an existing furnace however, the installation must match at least one of the scenarios outlined:

- The furnace was decommissioned fully and gas line capped.
- The heat pump was configured to use the existing furnace as a blower, while using only heat generated by the heat pump. The gas line must be capped.
- The furnace was set up to provide backup emergency heat, with the heat pump still set up to be the primary heating source. The existing furnace is not required to be specified in the equipment added to Iris. If this option is selected, the following additional **required** questions will appear in Iris:
  - What changeover temperature was programmed?
    - Changeover temperature is defined as the ambient temperature that the heat pump turns off.
  - What is the age of the furnace?
  - What controls are used to enable dual fuel operation?

### ***Confirming Air-Source Heat Pump Eligibility***

You may use the following resources to identify or check the eligibility of HVAC equipment:

- [Heat Pumps | The Switch Is On Product Finder \(https://products.switchison.org/heat-pumps/4\)](https://products.switchison.org/heat-pumps/4)
  - Use the “TECH Clean California” filter, and look for the TECH Clean California badge pictured here:



- Eligible equipment configurations will include the ENERGY STAR® ID alongside the AHRI number.
- Equipment that was recently removed from the ENERGY STAR® list will include a note identifying the date of removal. Units must be on the current ENERGY STAR® list at the time the pre-approval is submitted to be eligible for incentives. Failure to install qualifying equipment could result in a formal warning or removal from future participation.

### **Air-to-Water Heat Pumps**

Newly installed AWHP systems must meet the following requirements:

1. Features a refrigerant to water, or water/glycol heat exchange.
2. Must provide space heating.
3. Can achieve a heating coefficient of performance of 1.7 or greater at full load capacity at a dry bulb outdoor temperature of 5°F.
4. Can achieve a leaving water temperature of at least 110°F



## ***Eligible Air-to-Water Heat Pumps***

Air-to-Water Heat Pump QPL can be found and downloaded [here \(https://frontierenergy-tech.my.salesforce.com/sfc/p/5f000003GyZS/a/RO000003EiNd/23zYqN\\_Qa3F9l8v3791MF.LsjMKpPHiHqx7P.Vv\\_gGM\)](https://frontierenergy-tech.my.salesforce.com/sfc/p/5f000003GyZS/a/RO000003EiNd/23zYqN_Qa3F9l8v3791MF.LsjMKpPHiHqx7P.Vv_gGM).

Please Note: Failure to install qualifying equipment after offering a TECH incentive to your customer will result in the rejection of your incentive claim and may result in corrective action including formal warnings and/or removal from the TECH program.

## **Incentive Budgets**

- Total Budget: \$20 million
  - \$10 million for market-rate projects (Air-source HVAC and Air-to-water heat pumps (AWHP))
  - \$10 million for equity-qualified projects (air-source HVAC only)
- If the equity budget is fully reserved first, equity-qualified customers will be allowed access to the remaining market-rate funds.
- Funds are available statewide with no geographic restrictions.
- Incentive dollars are allocated on a first-come, first-served basis.
- Track the available incentive budget at [TECH Clean California Public Reporting | Incentives \(https://techcleanca.com/incentives/multifamily-information/\)](https://techcleanca.com/incentives/multifamily-information/).
  - See [How to Navigate the TECH Budget Table \(https://frontierenergy-tech.my.site.com/contractorsupport/s/article/TECH-budget-table\)](https://frontierenergy-tech.my.site.com/contractorsupport/s/article/TECH-budget-table) for assistance.

**Note: Do not promise incentives to customers until your reservation request is approved. Notices will be issued to all TECH participating contractors when funds are close to depletion. Funding is not formally set aside for any project until the reservation request is approved.**

## **Incentive Amounts**

### **Air-Source Heat Pumps**

Incentive Type	Does the Customer Have Previous AC?	Was the Previous Heating System Fully Decommissioned?	Incentive/Unit



Market Rate	Yes	Yes	\$1,500
		No	\$1,000
	No	Either	\$1,000
Equity	Yes	Yes	\$4,000
		No	\$3,500
	No	Either	\$3,500

**Note:** Decommissioned is defined as being completely removed from operations.

### Air-to-Water Heat Pumps

Global Warming Potential of Refrigerant	Incentive per Unit
Standard	\$3,500
Low GWP Refrigerant (<150)	\$5,000

### ***Pass-Through Requirements***

Contractors must pass the full incentive amount to the customer. They can do so at point of sale (instant discount) or after they receive the incentive from TECH (delayed pass-through). The delayed pass-through method must be completed within 30 days of receiving the check. For more details about pass-through requirements, please see the Customer Terms & Conditions and Invoice Requirements (<https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Contractor-Invoice-Customer-Agreement>) article.

### ***Stacking Rules***

HEEHRA Phase I rebates cannot be stacked with TECH Clean California incentives; however, there are opportunities to stack additional incentives with the TECH Clean California incentive. To find additional incentives, visit incentives.switchison.org/contractors (<https://incentives.switchison.org/contractors>).





The sum of all incentives provided through TECH cannot be greater than the total project cost minus external incentives. In cases where the incentive is greater than the total project cost, the incentive will be automatically lowered by Iris to be equal to the total project cost.

### ***Equity Qualification***

The equity incentive is available for residents who verify their income to show that the household income is either of the following (whichever is less stringent):

- At or below 80 percent of the area's median income, or
- At or below 250 percent of the federal poverty level.

Income must be verified via:

- TECH Income Verification Portal, or
- Approval for HEEHRA Phase I or another approved technology incentive program (limited cases).
- 

After the customer's income verification application has been submitted, the contractor and customer will receive a notification of approval or denial.

Proof of income verification must be submitted alongside the reservation request (pre-approval) in Iris by uploading the approval PDF document.

For more details, please visit our [TECH Single Family Heat Pump Equity Incentives & Eligibility](https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Equity-Incentives-Qualification) (<https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Equity-Incentives-Qualification>) article.

## **Reservation and Claim Requirements**

### **Reservations**

Reservations are required to ensure funding. In Iris, contractors will be asked to fill out a reservation request (also known as a pre-approval). Once this reservation request has been approved by the project team, then funding has been fully reserved for the project, the installation can commence, and the reservation can be converted into a claim and submitted for review and payment. For more information about reservation requests, please see our article [Single Family Reservations](https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Claim-Reservation-Rules-SF) (<https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Claim-Reservation-Rules-SF>).



## Submitting the Claim

Once the reservation has been converted to a claim, the remaining claim fields must be answered and supporting documentation must be uploaded.

### **Claim Requirements**

For a list of all required fields, please see [this flyer \(https://frontierenergy-tech.my.salesforce.com/sfc/p/5f000003GyZS/a/RO000001FBXF/De1bhI0AYiGnv1HJnuGzzwCsoBvuG1vK.VMx4pv8R64\)](https://frontierenergy-tech.my.salesforce.com/sfc/p/5f000003GyZS/a/RO000001FBXF/De1bhI0AYiGnv1HJnuGzzwCsoBvuG1vK.VMx4pv8R64) or this [Excel document \(https://frontierenergy-tech.my.salesforce.com/sfc/p/5f000003GyZS/a/RO0000018AeL/jjilfY2gdUMMFcDu5YrE4KGII1LajkbK3rainIAQlrQ\)](https://frontierenergy-tech.my.salesforce.com/sfc/p/5f000003GyZS/a/RO0000018AeL/jjilfY2gdUMMFcDu5YrE4KGII1LajkbK3rainIAQlrQ). For a step-by-step process of turning your approved pre-approval into a claim, please see the [Single Family Incentive Submission Step-by-Step \(https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Single-Family-Incentive-Submission-Step-by-Step\)](https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Single-Family-Incentive-Submission-Step-by-Step) article.

### **Documents**

- **Itemized Statement of Work**

- Itemized statements of work documents are required for all SF HVAC projects. This document includes all required information of an invoice PLUS itemized equipment and labor costs for all relevant project costs. This does not need to be shared with customers and these itemized costs will not be reported on a per contractor basis. They will only be aggregated for regional statistics on the Public Reporting Site ([techcleanca.com](http://techcleanca.com) (<http://techcleanca.com>)). For more information about this requirement, including a template of the document that must be used, please see [this Contractor Knowledge Base 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).

- **Customer Terms and Conditions** – Read more [here \(https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Contractor-Invoice-Customer-Agreement\)](https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Contractor-Invoice-Customer-Agreement).
- **Documents showcasing testing has been completed** – see [below](#).

### Testing Requirements

Where required by the Authority Having Jurisdiction (AHJ), applications require **completed HERS package** (<https://tech.freshdesk.com/support/solutions/articles/69000809374>).

Instances in which AHJs may not require a HERS package include:

- Mobile home
- Ductless mini-split systems in exempt climate zones
- Asbestos present
- Air-to-Water heat pumps
- Other - If "Other," must input reason in Iris claim field.



If the project meets any of the above circumstances and a HERS test is not required, **then a PNNL Quality Install export containing nameplate photos of the condenser of the new equipment is required in lieu of a HERS package. Note that pre- and post-installation photos collected through the PNNL Quality Install tool must use the 'geotagging' feature, which captures the location where the photo was taken.**

Please watch the **"PNNL Quality Install"** (<https://www.youtube.com/watch?v=nDp6RhKnk7k>) video or visit this Knowledge Base Article (<https://frontierenergy-tech.my.site.com/contractorsupport/s/article/PNNL-Quality-Install-Tool>) for more information.

## **Customer Requirements**

### **Demand Response Requirements**

Demand response (<https://www.switchison.org/techcleanca/demand-response>) program enrollment will be required for TECH Clean California incentives.

Customers will need to confirm that their demand response enrollment intention when signing the TECH Clean California Terms and Conditions.

For more information about demand response, please see [this article \(https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Demand-Response-Requirements\)](https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Demand-Response-Requirements).

### **Tenant Protections**

Newly introduced tenant protection requirements apply to all tenant-occupied units.

Property owners are required to execute a Tenant Protection Agreement (TPA) which includes caps on rent increases and protection against evictions based on building retrofits.

- TPAs will be sent to owners via email for signature directly by the TECH team after the reservation request is submitted in Iris.
- **Reservations will not be approved, and installations may not take place until TPA has been fully executed.**

In addition to the TPA, a Tenant Notice will be sent to all tenants. The notice describes TECH Clean California and its incentives, building electrification, and explains that the property owner or manager cannot evict or raise rent based on the property's participation in the program. Tenants and building owners will be required to sign the notice as part of Customer Terms and Conditions and Tenant will receive notice via mail.

For additional support, please see the article, [Tenant Protection Requirements \(https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Tenant-Protection-Requirements\)](https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Tenant-Protection-Requirements).

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