

Rebate Reservation Application

The City of San José is offering rebates to single-family and multi-family households in San José to switch from a natural gas water heater to an electric heat pump water heater. Income-qualified households will be eligible for additional incentives. **Rebates are limited and will be available on a first-come, first-served basis. Only one rebate per household address.**

How Electrify San Jose works:

1. **Reserve a Rebate** - Submit completed “Rebate Reservation Application” packet. City of San José approves application, reserves rebate for up to 90 days, and sends email notice.
2. **Apply for a Building Permit** - Apply for a City of San José building permit by visiting the [City of San José Permit Center](#).
3. **Start the Project** - Property owner contracts directly with a contractor to complete the project.
4. **Submit Installation Verification** - After project is complete, submit “Post-installation Application” packet within 90 days of the approved “Reservation Application.” Failure to submit within 90 days may result in loss of rebate.
5. **Receive a Rebate** - The City of San José approves post-installation application and sends email notice. **Rebate is paid and mailed within 2-4 weeks of submitting all required documentation.**

Rebate Reservation Application Checklist

1. Reserve a Rebate

Confirm that the heat pump water heater you are planning to install meets all the following requirements:

- Replacing an existing gas water heater
- Has a minimum Uniform Energy Factor of 2.87 or greater
- Has a thermostatic mixing valve
- is Energy Star® Certified
- Grid-connected capabilities (i.e., has grid-connected communications device that can allow the grid operator or San José Clean Energy to control in real time).

Confirm that the installation site:

- Is located in an existing single-family home or existing multifamily unit in San José (New construction is not eligible)

Confirm that the reservation application packet includes the following documents:

- Completed and signed [Form #1 Rebate Reservation Application](#)
- Completed and signed [Form #2 Program Terms and Conditions](#)
- [W9 Form \(download here\)](#) completed and signed by property owner or contractor
- Photo of existing natural gas water heater

Due to COVID-19, please consider emailing your application for faster processing as staff are working from home.

Email to energy@sanjoseca.gov, mail, or drop off completed application packet to the address below. You will receive an email confirmation within 3 business days about the status of your application, including your rebate expiration date.

Attn: Amanda Leonis
City of San José
200 E. Santa Clara Ave. – 10th Floor
San Jose, CA 95113-1905

2. Apply for a City of San José building permit:

Both electrical and plumbing permits are required. Please review the [Water Heater Installation Requirements](#) and visit the [City of San José Permit Center](#) to apply.

Due to COVID-19, the Building Department is working remotely until further notice. Please follow these [Remote Procedures For Permits, Plan Review, Inspections, And Code Enforcement During COVID-19](#).

Visit sanjoseca.gov/electrifysanjose for a list of frequently asked questions. For all other questions, please contact energy@sanjoseca.gov.



Electrify San José

Heat Pump Water Heater Rebate Program

Form #1 Rebate Reservation Application

Customer Information

Property Owner Name: _____
Last *First* *M.I.*

Project Address: _____
Street Address *Apartment/Unit #*

_____ *City* *State* *ZIP Code*

Phone: _____ Email* _____

Contractor Information

Contractor Name: _____ License No: _____
Last *First* *M.I.*

Business Name (if applicable): _____ License No: _____

Contractor or Business Address: _____
Street Address *Apartment/Unit #*

_____ *City* *State* *ZIP Code*

Phone: _____ Email* _____

If you are using more than one contractor, fill out the section below. Otherwise, leave blank.

Contractor Name: _____ License No: _____
Last *First* *M.I.*

Business Name (if applicable): _____

License No: _____

Contractor or Business Address:

Street Address *Apartment/Unit #*

City *State* *ZIP Code*

Phone: _____

Email* _____

*Email is required. The City of San José will email the customer and contractor updates and information about the rebate.

Project Information

1. How did you hear about this program?

- | | |
|--|---|
| <input type="checkbox"/> Website search | <input type="checkbox"/> Direct mail (e.g. letter) |
| <input type="checkbox"/> Friend or family recommendation | <input type="checkbox"/> Other (please list): _____ |
| <input type="checkbox"/> City event | |

2. Indicate the current water heater type:

- Natural gas tank
 Natural gas tankless or on-demand

3. Current water heater(s) being replaced:

Product Brand: _____ Volume (Gallons): _____

Model #: _____ Age (Years): _____

Number of Water Heaters Replaced: _____

4. Project type:

- | | |
|--|---|
| <input type="checkbox"/> Single-family home | <input type="checkbox"/> Multifamily, 2-4 units |
| <input type="checkbox"/> Accessory dwelling unit | <input type="checkbox"/> Multifamily, 5+ units |

5. Current water heater location:

- | | |
|--|---|
| <input type="checkbox"/> Basement | <input type="checkbox"/> Attic |
| <input type="checkbox"/> Outdoor | <input type="checkbox"/> Other (please list): _____ |
| <input type="checkbox"/> Indoor (e.g., closet) | |

6. What is the amp size of the electric panel?

- | | |
|------------------------------|---|
| <input type="checkbox"/> 100 | <input type="checkbox"/> 400 |
| <input type="checkbox"/> 200 | <input type="checkbox"/> Other (please list): _____ |

7. Does the project site currently have solar photovoltaic panels installed?

Yes

No

8. What other electric appliances/technologies are currently installed at the project site?

Check all that apply:

Electric vehicle

Electric or induction stovetop

Electric clothes dryer

Electric or heat pump HVAC

Estimated Project Scope of Work and Cost

1. Where will the heat pump water heater be installed?

Same location as existing

Other (list): _____

2. Product Type for Installation:

Product Brand: _____ Volume (Gallons): _____

Model # _____

Uniform Energy Factor (must be at least 2.87): _____

3. Fill out the table below with the project scope of work

SCOPE OF WORK	ESTIMATED COST (list cost or \$0 if not included in the scope)
Heat Pump Water Heater	
Electrical Panel Upgrade	
Installation Labor	
Permit Fee(s)	
Other (list):	
Other (list):	
Other (list):	
TOTAL EST. PROJECT COST (\$):	
TOTAL REBATE REQUESTED (\$)**:	
TOTAL REMAINING EST. COST TO CUSTOMER:	

**Requested rebate amount may be up to the total project cost based on the following guidelines:

Customer Type	Heat Pump Water Heater	Installation Labor	Electrical Panel Upgrade	Building Permit Fees	Maximum Total Rebate
Income-qualified resident (CARE/FERA)	Up to cost for qualified products	Up to cost			\$6,000 with panel upgrade or \$3,500 without panel upgrade
All other residents	Up to cost for qualified products	Up to cost			\$4,500 with panel upgrade or \$2,000 without panel upgrade

4. Who would you like the rebate to go back to? This person or entity must submit a completed W9 form.

- Property owner Contractor

I have attached the following (all are required):

- Completed [W9 Form \(download here\)](#) for person identified in #4
 Photo of existing natural gas water heaters

Disclaimer and Signature

I certify that my answers are true and complete to the best of my knowledge. I understand that the reservation is valid for 90 days from date of reservation confirmation by the City of San José. I understand the reservation by itself does not guarantee payment under this program. A valid and complete "Post-Installation" packet must be provided to the City of San José before the 90-day reservation expiration to be considered for payment.

Contractor
or
Property
Owner
Signature: _____

Date: _____



Electrify San José Heat Pump Water Heater Rebate Program

Form #2 Program Terms and Conditions

Contractors and property owners must meet and agree to the following terms and conditions to be eligible to receive a heat pump water heater rebate:

1. Rebates are paid directly to the contractor or homeowner. The rebate recipient must submit a W-9 at the time of application in order to receive the rebate.
2. New equipment must replace existing gas-powered equipment.
3. Equipment must be permanently affixed to property.
4. Rebates are not to exceed the total cost of the project (including labor and equipment costs).
5. The building must be a single-family or multifamily residential home located within the City of San José. Only one rebate per household address.
6. Only equipment installed after July 1, 2019, is eligible for the rebate.
7. Replacements must be for existing residential properties. New construction is not eligible for this program.
8. Any utility, state, or federal efficiency rebates in addition to City of San José rebate must be petitioned for by the contractor and/or property owner and are the responsibility of the contractor and/or property owner.
9. The City of San José is not responsible for any taxes that may be imposed on the contractor and/or property owner as a result of receiving a rebate. Please contact your tax advisor for more information.
10. It is the property owner's responsibility to contract with the contractor and to assume responsibility for the work to be performed.
11. All upgrades requiring a building permit from the City of San José's Building Department must be applied for and finalized.
12. The City of San José is not responsible for the contract that is entered into between property owner and contractor; and the City of San José will not get involved in property owner or contractor disputes.
13. The property owner and contractor waives and releases the City of San José from any and all claims and causes of action arising out of the replacement project.
14. The property owner and contractor shall defend, indemnify, protect, and hold harmless the City of San José, its elected and appointed officers and employees, from and against all claims for damages, liability, cost, and expense arising out of or alleged by third parties to be the result of the negligent acts, errors or omissions or the willful misconduct of the property owner.
15. The City of San José does not guarantee that all requests will be fulfilled. The City of San José reserves the right to modify or discontinue this Program without prior notice for any reason, including but not limited to if such notification or discontinuance is required by the funding agencies.
16. Rebates are distributed first-come, first-served until funds are exhausted. Once funds are exhausted, a waitlist will open. To be placed on the waitlist, applicant must submit a completed Rebate Reservation Application Packet. Applicants will be called off the waitlist in the order that their application is approved. If called off the waitlist, applicants will receive an email and/or phone call and have 14 days to accept the rebate. Failure to accept the rebate within 14 days will result in forfeiture and removal from the waitlist. The City will allocate the forfeited rebate to the next applicant on the waitlist. If the applicant fails to respond within 14 days due to extenuating circumstances, the applicant may submit a request to re-join the wait list and be placed in the order that their application was approved. The City's decision on whether

extenuating circumstances existed is final. However, if an applicant fails to respond within 30 days of notification, a request to re-join the wait list shall only be returned to the end of the list.

17. The City of San José will not use the property owner's name or any identifying characteristics of the property owner for advertising, sales promotion or other publicity without prior written approval of the applicant.
18. Projects must be completed and post-installation application must be submitted and approved by the City within 90 days of the approved eligibility application. Failure to submit post-installation application within 90 days may result in loss of rebate.

PROGRAM DISCLAIMER

1. **I UNCONDITIONALLY AGREE TO WAIVE, RELEASE, AND DISCHARGE** the City of San José, including but not limited to its officers, agents, employees and Program Partners, from any and all claims and causes of action, whether in law or equity, that I, my agents, employees, assigns, heirs, next of kin, or successors in interest may have for ANY LIABILITY, LOSS, DAMAGE, or INJURY, whether known or unknown, including liability for personal injury, death, dismemberment, damage to property, or theft, arising out of, related to, or in connection with the Electrify San José Rebate program, including whether or not caused or claimed to be caused by the active or passive negligent acts or omissions of the City.
2. **I AGREE TO DEFEND, INDEMNIFY, AND HOLD HARMLESS** the City of San José, including but not limited to its officials, agents, employees and Program Partners from and against any and all liability, whether known or unknown, including but not limited to claims asserted, damages, demands, causes of action, costs, expenses, losses, attorney fees, injuries, or payments for injury to any person or property, including injury to myself or others claimed to be caused by the acts or omissions of myself or in any way connected with the Electrify San José Rebate program. Also covered is liability arising from, connected with, caused by, or claimed to be caused by, the active or passive negligent acts or omissions of the City that may be in combination with the active or passive negligent acts or omissions of myself, my agents, or any third party.
3. **I AGREE AND EXPRESSLY ACKNOWLEDGE** that the foregoing Waiver, Release, and Indemnity Agreement is intended to be as broad and inclusive as is permitted by the law of the state of California, and that if any portion of this Agreement is held invalid, that the balance shall continue in full force and effect; I UNDERSTAND AND EXPRESSLY ACKNOWLEDGE that the City is relying on my representation that I have the authorization to sign this document; and I CERTIFY that I have read this agreement, understand its contents, voluntarily sign this Waiver, Release, and Indemnity Agreement; and further agree that no oral representations, statements, or inducements apart from this written Agreement have been relied upon.
4. I, _____ **(Property Owner)**, **HEREBY AUTHORIZE** any utility, including San José Clean Energy, financial institution, or other holder of my financial or energy records to release my information to the City of San Jose for consideration for my participation in the Heat Pump Water Heater Rebate Program. This authorization is effective immediately and expires 120 days after the date of my signature below. I understand that I may withdraw this authorization at any time.

Property
Owner
Signature: _____

Date: _____