

# SMUD Residential Pilot Heat Pump Water Heater (HPWH) Rebate Application

## Rebate eligibility requirements and how to apply via mail

1. Must be a SMUD electric residential service customer.
2. Must be a SMUD-approved model with a minimum Uniform Energy Factor (UEF) of 2.87.
3. Must install an approved ASSE 1070 3/4" Thermostatic Mixing Valve with your HPWH.

\* **The following documents are required in order to receive the HPWH rebate:**

- Copy of building permit     Copy of the contract/invoice and sales receipt     Copy of the mixing valve receipt
- Pre-installation and Post-installation photo of HPWH

**Photos must include:** (a) Gas water heater and surrounding area (b) New electric HPWH and surrounding area (c) Installed mixing valve on new heater

### APPLICANT INFORMATION

SMUD ACCOUNT NUMBER (at installation address)			
CUSTOMER/PURCHASER NAME (check payable to)		TENANT NAME (if different)	
MAILING ADDRESS (check to be mailed to)		INSTALLATION ADDRESS (if different)	
CITY / STATE / ZIP CODE (check to be mailed to)		CITY / STATE / ZIP CODE	
EMAIL ADDRESS		EMAIL ADDRESS	
HOME PHONE (     )	WORK PHONE (     )	TENANT HOME PHONE (     )	TENANT WORK PHONE (     )

### HEAT PUMP WATER HEATER REBATE

Rebated product	Electric-to-electric upgrade	Gas conversion	Qty.	Make	Model	Installation date	Purchased from	Combined purchase and installation cost	Receipt included
HPWH 50 gal. min. (UEF) ≥ 2.87	\$1,000 rebate <input type="checkbox"/>	\$3,000 rebate <input type="checkbox"/>							<input type="checkbox"/>

### PAYMENT RELEASE AUTHORIZATION (to be completed only if rebate will be released to contractor)

Please also refer to the Sales Terms, Conditions and Responsibilities

Authorized by: SMUD account holder (print) \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Check made payable to: \_\_\_\_\_

Payee mailing address: \_\_\_\_\_ Apt/Unit#: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

If payee is a business, please provide **either** the Employee Identification Number (EIN)/Federal Tax ID or Social Security Number in the appropriate space below.

\_\_\_\_\_ - \_\_\_\_\_

**I certify by my signature that:** (1) I have purchased the product(s) that meet the Residential Rebate Eligibility Requirements set forth by SMUD; (2) I have read and understand all of the Terms and Conditions set forth by SMUD; (3) I declare under penalty of perjury under the laws of the State of California that the above information is true and correct.



Customer signature \_\_\_\_\_ Print name \_\_\_\_\_ Date \_\_\_\_\_

### SMUD USE ONLY

DSM AGMNT#	Approved <input type="checkbox"/>	Denied <input type="checkbox"/>	Scanned <input type="checkbox"/>	Initials _____	Date letter sent _____
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## PROGRAM TERMS AND CONDITIONS

1. Product installed and/or equipment provided must:
  - a. Comply with SMUD's program guidelines.
  - b. Be a retrofit of an existing residential dwelling; residence must have active SMUD residential electric service at time of application and must be fully constructed and occupied.
  - c. Be for personal use only, **not for resale**.
2. Application must include copies of receipts and/or other supporting documents. These documents will be destroyed to protect your information and will not be returned.
3. All correspondence will be conducted via email if an email address is provided. If you prefer to receive mailed correspondence, please do not provide an email address on the application.
4. If additional information is requested, please provide the required document(s) within two weeks. If documents are not received within two weeks, your application will be considered incomplete and will be canceled. You can reapply as soon as you have all necessary documentation to submit.
5. Rebate programs are subject to availability of funds. SMUD expressly reserves the right to modify, amend or terminate the program in whole or in part, at any time and for any reason without prior notice. To obtain current rebate program information, go to [SMUD.org/rebates](http://SMUD.org/rebates), call 916-732-6798, or email [Michael.Corbett@smud.org](mailto:Michael.Corbett@smud.org).
6. Rebate application must be received within 180 days of purchase. Rebate amount is based on the program offering and funding levels applicable on the date the application is received.
7. Customer is solely responsible for obtaining related building permits and completing the inspection process as required by local jurisdiction. Manufactured, modular or factory built homes transported and assembled on site DO NOT QUALIFY for a rebate unless all of the following can be demonstrated.
  - Homeowner is an active SMUD customer with an active SMUD account
  - Home is individually metered by SMUD
  - Home is placed on a permanent foundation
  - Manufactured, modular or factory built homes transported and assembled on site must be built in conformance with state and local building code, and governed by local or the County of Sacramento Building Department.
  - Mobile homes on a chassis and axle constructed under HUD codes or that have a State of California Community Services Department sticker indicating status as a licensed mobile home DO NOT QUALIFY.
8. Disclaimer of Warranties: SMUD makes no representations, expressed or implied, regarding the design, installation, construction, reliability, efficiency, performance, operation, maintenance, or use of any energy efficiency equipment or systems analyzed, discussed, selected, rejected, installed or otherwise considered by Customer. Any decisions regarding the selection, design, installation, use and operation of any energy efficiency equipment or systems shall be at the sole discretion and are the sole responsibility of Customer.
9. Customer/Purchaser shall indemnify, defend, and hold harmless SMUD, its directors, officers, agents, and employees against all claims, loss, damage, expense, and liability asserted or incurred by other parties including, but not limited to, SMUD's employees and Customer/Purchaser's employees, arising out of or in any way connected with this rebate program and caused by the acts, omissions, intent or negligence, whether active or passive, of Customer/Purchaser, its agents, employees, and suppliers, and excepting only such loss, damage or liability as may be caused by the intentional act or the sole negligence of SMUD.
10. By applying for rebate: Product must be **new/undamaged** and installed at a residential location within SMUD's service area. Products that are resale, rebuilt, rented, leased, exchanged, won as a prize, or new parts installed into existing products are not eligible for rebate.
11. SMUD reserves the right to inspect the installation premises or request additional documentation prior to rebate payment. Rebate may be denied by SMUD if this condition is not met by Customer/Purchaser.
12. The rebate amount cannot exceed the total purchase and installation cost, nor can a rebate be received for the same product/equipment from more than one utility participating in this program funded with Public Goods funds.
13. Each individual executing this agreement on behalf of a party represents and warrants that he or she is duly authorized to execute and deliver this agreement on behalf of said party.

**NOTE: Rebate checks will be mailed 4 to 6 weeks after receiving all required documentation.**

### **SALESPERSON TERMS, CONDITIONS and RESPONSIBILITIES (in addition to aforementioned)**

1. Tax liability: rebates are taxable if greater than \$600 and will be reported to the Internal Revenue Service (IRS). SMUD will report your rebates as income received on IRS Form-1099. Consult your tax advisor concerning taxability of incentives. SMUD is not responsible for any taxes imposed upon you as a result of this incentive payment.
2. Model number of the equipment installed (see Terms and Conditions, item 3 above) must be listed on the contract/bid, sales receipt or invoice, and on rebate form.
3. Attach IRS Form W-9 (Request for Taxpayer ID). Not necessary to resubmit Form W-9 after first application submission.

Mail to:

SMUD - Residential Services  
Advanced Home Solutions, MS A203  
P.O. Box 15830  
Sacramento, CA 95852-0830

