

3CE's Electrify Your Home - Document Checklist

Please refer to the checklists below to ensure you have all necessary documentation and information before beginning your application. All applicants must be 3CE customers (to verify, look for “3CE Electric Generation Charges” on your most recent bill).

All Projects – all applications will require the following information:

- ☐ Finalized permit(s)
- ☐ Paid invoice (or purchase receipt for portable heat-pump space conditioners)
- ☐ Photos of the old appliance proving permanent removal (heat-pump water heater [HPWH], HVAC, induction cooktop/range)
- ☐ Photos of the new appliance/wiring (HPWH, HVAC, induction cooktop/range, portable heat-pump space conditioner, pre-wiring)
- ☐ Contractor information including company name, California State Licensing Board (CSLB) number, contact information
- ☐ Appliance details (capacity, size, model number, manufacturer)

Renters – in addition, the below documents may be necessary for applicants who completed a project in a home they are renting:

- ☐ [Homeowner Program Participation Agreement](#) (for renters applying for HVAC, HPWH or induction cooktop/range rebates)
- ☐ Renter Verification (for renters applying for portable heat-pump space conditioner rebates)

Contractor Applicants – in addition,

- ☐ The [Rebate Assignment to Contractor Form](#) will be necessary if the rebate check will be distributed directly to the contractor

Income-Qualified Customers – in addition, the below documentation may be necessary for applicants pursuing income-qualified rebates:

- ☐ Single family – applicant should upload a redacted copy of their **1040 Tax Form** for the most recent year if they are not enrolled in either the CARE or FERA programs
- ☐ Multifamily – applicants may upload one of the following documents to prove a project was completed for an affordable housing complex. Applicant may request an exception if documents are not available
 - Welfare Tax Exemptions documents
 - Low-Income Housing Regulatory Agreement
 - Recorded Deed-Restriction or Resale Restriction Agreement

Documentation Details

Finalized Permit: All projects must receive a permit from the county or city of jurisdiction. Please ensure that the permit has been finalized; rebates will not be issued for open permits. Please reach out to the installing contractor if you do not have your finalized permit.

Paid Invoice: Invoice must be itemized with costs for each appliance and installation. Invoice must indicate that the contractor has been paid, or a payment plan established. Note that contractors who will receive the rebate on behalf of the customer must include full rebate amount as a discount on the invoice.

Photos of the old appliance: Heat-pump water heater, heat-pump HVAC and induction cooktop/range projects must include photos that clearly show the following:

- Appliance fuel type
- Permanent removal or gas-line cap

Photos of new appliance: Heat-pump water heater, heat-pump HVAC, induction cooktop/range, and pre-wiring projects must include photos that clearly show the following:

- Make
- Model
- ENERGY STAR® badge
- Complete Installation

Portable heat-pump space conditioner projects must provide a photo clearly showing the make and model.

California State Licensing Board (CSLB) license number: Qualifying projects must be installed by contractors holding relevant and active CSLB licenses. The contractor's CSLB license number may be on the project invoice; if not, the contractor will be able to provide it.

Homeowner Program Participation Agreement: Renters installing a heat-pump water heater, heat-pump HVAC, or induction cooktop/range will require sign-off from the homeowner to receive an application. Note, renters purchasing a portable heat-pump space conditioner will NOT require this form.

Renter Verification: Rebates for portable heat-pump space conditioners are only available to customers renting a home, apartment or other dwelling. To verify, the renter must submit a copy of their rental insurance, lease, or other document showing rental status. The document must include the tenant's name, address and lease period (if applicable).

3rd Party Rebate Assignment Form: A customer may assign their rebate check to be mailed to their contractor. To assign the rebate to the contractor, applicants must attach a completed Rebate Assignment Form in which the customer acknowledges and agrees to allow the contractor to receive the rebate. Note: the invoice must also clearly indicate that the entire value of the rebate was discounted upfront from the project cost. If the invoice does not clearly show that the customer received the full rebate amount, the application may be denied.

1040 Tax Form: This standard tax form will allow 3CE staff to verify a customer's eligibility to receive enhanced, income-qualified incentives, even if they are not enrolled in either the California Alternate Rates for Energy (CARE) or Family Electric Rate Assistance (FERA) programs. If the customer is enrolled in CARE or FERA, the 1040 Tax Form is not required. Household income thresholds can be found in the "Moderate Income Thresholds" table provided on the Eligibility tab.

Welfare Tax Exemption documents, Low-Income Housing Regulatory Agreement, Recorded Deed-Restriction or Resale Restriction Agreement: These documents may be presented for multifamily projects to verify that the property is considered affordable housing. If no documents are available, the applicant may request an exception and provide justification for the project to receive enhanced, income-qualified rebates. Exceptions may be granted at the sole discretion of 3CE.