

PSE&G HVAC Instant Rebate Program Incentive Claim Form



INSTRUCTIONS

Participating Contractor: Please submit this incentive claim form along with a detailed paid receipt or invoice. All submitted receipts or invoices must include the total instant rebate amount provided to a customer at the point of sale or installation, a valid purchase made between July 1, 2021, to June 30, 2024 (within 120 days of the purchase date), and the model and serial number(s) for each unit installed.

CUSTOMER AND TRADE ALLY INFORMATION

Type of Residence: Single Family Multi-Family (2-4 units) Townhome Mobile Home

On-Bill Repayment (OBR) Participant (confirmed preapproval required): Yes No

Homeowner Name:		Contractor Company Name:	
Homeowner Email:		Contractor Email:	
Homeowner Phone #:		Contractor Phone #:	
Installation Address:		Contractor Contact Name:	
City, State, ZIP:		NJ HVAC License #:	
County:		Participating Distributor Name:	
# of Individuals in Household:			

This is voluntary information. It is compiled and recorded for statistical purposes only.

- White/Caucasian Black/African American Hispanic/Latino Asian American Indian/Alaska Native
 Pacific Islander More than one race Other: _____ Decline

CUSTOMER UTILITY ACCOUNT INFORMATION (MUST PROVIDE GAS AND ELECTRIC UTILITY ACCOUNT NUMBERS BELOW)

Gas		Electric	
<input type="checkbox"/> PSE&G:		<input type="checkbox"/> PSE&G:	
<input type="checkbox"/> Elizabethtown:		<input type="checkbox"/> Atlantic City Electric:	
<input type="checkbox"/> NJNG:		<input type="checkbox"/> Rockland Electric Co.:	
<input type="checkbox"/> SJG:		<input type="checkbox"/> Municipal Electric Co.:	
		<input type="checkbox"/> JCP&L:	

HVAC AND WATER HEATER EQUIPMENT INFORMATION – ELECTRIC

Existing/New Equipment

- Is existing equipment still in working condition? Yes No
- Does the new unit replace the same type of equipment? Yes No
If no, what is the existing equipment type being replaced? _____
- Was the system selected according to Manual S criteria based on Manual J Loads? Yes No

For Smart Thermostats

- What type of HVAC system will the thermostat control? Air-Source Heat Pump (ASHP)
 Ground-Source Heat Pump (GSHP) Mini-Split Heat Pump (MSHP) Furnace Electric Resistance
 Central Air Conditioner Boiler Unknown
- What type of unit is the thermostat controlling? Cooling Only Heating Only Combo (Cooling and Heating)
- For heating only and combo units, please specify the heating type: Electric Gas Other None

HVAC AND WATER HEATER EQUIPMENT INFORMATION – ELECTRIC

ENERGY STAR® HVAC AND WATER HEATING ELECTRIC MEASURES	AHRI CERTIFICATE NO.	MANUFACTURER	MODEL	OUTDOOR SERIAL NUMBER	INDOOR SERIAL NUMBER	PSE&G INSTANT REBATE (PER UNIT)	LMI INCENTIVE (IF APPLICABLE)	PARTNER UTILITY INCENTIVE (IF APPLICABLE)			TOTAL REBATE
								ACE	JCP&L	RECO	
Central Air Conditioning – Tier 1 (SEER ≥ 16, EER ≥ 12.5)						\$180	\$200	\$300	\$325	\$180	\$
Central Air Conditioning – Tier 2 (SEER ≥ 18, EER ≥ 13)						\$270	\$200	\$500	\$500	\$270	\$
Air-Source Heat Pump – Tier 1 (SEER ≥ 16, EER ≥ 12.5, HSPF ≥ 9)						\$300	\$200	\$600	\$600	\$300	\$
Air-Source Heat Pump – Tier 2 (SEER ≥ 18, EER ≥ 13, HSPF ≥ 10)						\$390	\$200	\$1,000	\$1,000	\$390	\$
Air-Source Heat Pump – Cold Climate – Tier 1 (SEER ≥ 16, EER ≥ 12.5, HSPF ≥ 9, and COP ≥ 1.75 at 5°F)						\$600	\$200	N/A	\$1,000	N/A	\$
Air-Source Heat Pump – Cold Climate – Tier 2 (SEER ≥ 18, EER ≥ 13, HSPF ≥ 10, and COP ≥ 1.75 at 5°F)						\$600	\$200	N/A	\$1,000	N/A	\$
Air-to-Water Heat Pump (COP > 1.75 at Full Load Capacity and 110°F Water Temperature)						N/A	\$200	N/A	\$1,000	\$600	\$
Geothermal Heat Pump – Replacing an Air-Source Heat Pump or Ground-Source Heat Pump	N/A					N/A	\$200	N/A	\$500	N/A	\$
Geothermal Heat Pump – Replacing an Electric Forced Air Furnace/Central Air Conditioning	N/A					N/A	\$200	N/A	\$1,500	N/A	\$
Ductless Mini-Split Heat Pump (Single: SEER ≥ 20, EER ≥ 12.5, HSPF ≥ 10; Multi: SEER ≥ 18, EER ≥ 12.5, HSPF ≥ 10)						\$240	\$200	\$400	\$400	\$240	\$
Ductless Mini-Split Air Conditioning (SEER ≥ 20, EER ≥ 12.5, HSPF ≥ 12)						\$270	\$200	\$500	\$500	\$270	\$
Heat Pump Water Heater						\$450	\$200	\$750	\$750	\$450	\$
Furnace Fan (ECM Motor Install– Retrofit Only)	N/A					\$60	\$200	\$100	\$100	\$60	\$
Smart Thermostat (With HVAC Equipment Install) ENERGY STAR ID#:	N/A					\$60	N/A	\$100	\$100	\$60	\$

REV: 02.08.22

RESIDENTIAL HVAC AND WATER HEATING – ELECTRIC: INCENTIVE SUMMARY

PSE&G HVAC Electric Instant Rebate Amount Owed:	\$
Partner Utility Electric Rebate Amount Owed:	\$
Enhanced Low to Moderate Income (LMI) Incentive Provided (if applicable):	\$
Total Rebate Amount:	\$

HVAC AND WATER HEATER EQUIPMENT INFORMATION – GAS

Existing/New Equipment

- Existing Equipment Fuel Type: Gas Oil Propane Electric
- Is existing equipment still in working condition? Yes No
- Does the new unit replace the same type of equipment? Yes No
 If no, existing equipment type being replaced? _____

For Smart Thermostats

- What type of HVAC system will the thermostat control? ASHP GSHP MSHP Furnace
 Electric Resistance Central Air Conditioner Boiler Unknown
- What type of unit is the thermostat controlling? Cooling Only Heating Only Combo (Cooling and Heating)
- For heating only and combo units, please specify the heating type: Electric Gas Other None

HVAC AND WATER HEATER EQUIPMENT INFORMATION – GAS

ENERGY STAR HVAC AND WATER HEATING GAS MEASURES	AHRI CERTIFICATE NO.	MANUFACTURER	MODEL	OUTDOOR SERIAL NUMBER	INDOOR SERIAL NUMBER	PSE&G INSTANT REBATE (PER UNIT)	LMI INCENTIVE (IF APPLICABLE)	PARTNER UTILITY INCENTIVE (IF APPLICABLE)			TOTAL REBATE
								Etown Gas	NJNG	SJG	
Reset Controls for Boiler (Attached to Qualifying Boiler)						\$75	\$200	\$200	\$200	\$200	\$
Gas Boiler – Tier 1 (AFUE 90%–94.99%)						\$270	\$200	\$750	\$750	\$750	\$
Gas Boiler – Tier 2 (AFUE ≥ 95%)						\$390	\$200	\$850	\$850	\$850	\$
Gas Furnace – Tier 1 (AFUE ≥ 95%–96.9%)						\$240	\$200	\$650	\$650	\$650	\$
Gas Furnace – Tier 2 (AFUE ≥ 97%)						\$360	\$200	\$750	\$750	\$750	\$
Gas Combo Heat – Tier 1 (AFUE ≥ 95%)						\$420	\$200	\$1,300	\$1,300	\$1,300	\$
Gas Combo Heat – Tier 2 (AFUE ≥ 97%)						\$480	\$200	\$1,500	\$1,500	\$1,500	\$
Gas Storage Tank Water Heater – Tier 1 (Power Vented < 55 Gallons, UEF ≥ 0.64 Medium Draw Pattern, High Draw Pattern UEF ≥ 0.68)						\$150	\$200	\$250	\$250	\$250	\$

HVAC AND WATER HEATER EQUIPMENT INFORMATION – GAS

ENERGY STAR HVAC AND WATER HEATING GAS MEASURES	AHRI CERTIFICATE NO.	MANUFACTURER	MODEL	OUTDOOR SERIAL NUMBER	INDOOR SERIAL NUMBER	PSE&G INSTANT REBATE (PER UNIT)	LMI INCENTIVE (IF APPLICABLE)	PARTNER UTILITY INCENTIVE (IF APPLICABLE)			TOTAL REBATE
								Etown Gas	NJNG	SJG	
Gas Storage Tank Water Heater – Tier 2 (Power Vented ≥ 55 Gallons, UEF ≥ 0.78 Medium Draw Pattern, High Draw Pattern UEF ≥ 0.80)						\$150	\$200	\$450	\$450	\$450	\$
Tankless Water Heater (UEF ≥ 0.87)						\$150	\$200	\$500	\$500	\$500	\$
Indirect Fired Storage Tank Water Heater (Paired With a Qualifying Gas Boiler)						\$150	\$200	\$250	\$250	\$250	\$
Qualifying Gas Heat With Qualifying Gas Water Heater – Tier 1 (< 55 Gallons and UEF ≥ 0.64 Medium Draw Pattern, UEF ≥ 0.68 High Draw Pattern or High Capacity)						\$450	\$200	\$1,100	\$1,100	\$1,100	\$
Qualifying Gas Heat With Qualifying Gas Water Heat – Tier 2 (≥ 55 Gallons and UEF ≥ 0.78 Medium Draw Pattern, UEF ≥ 0.80 High Draw Pattern or High Capacity)						\$660	\$200	\$1,300	\$1,300	\$1,300	\$
Smart Thermostat (With HVAC Equipment Install Only)	N/A					\$60	N/A	\$100	N/A	\$100	\$
ENERGY STAR ID#:	N/A										

RESIDENTIAL HVAC AND WATER HEATING – GAS: INCENTIVE SUMMARY

PSE&G HVAC Gas Instant Rebate Amount Owed:	\$
Partner Utility Gas Rebate Amount Owed:	\$
Enhanced LMI Incentive Provided (if applicable):	\$
Total Rebate Amount:	\$

PSE&G HVAC Instant Rebate Program

Customer Participation Agreement



CUSTOMER SIGNATURE IS REQUIRED

This Customer Participation Agreement (“Agreement”) sets forth the proposal for the undersigned utility customer (“Customer”) to participate in the PSE&G HVAC Instant Rebate Program (the “Program”). The Customer hereby proposes to have the HVAC Instant Rebate contractor listed below in the Proposal, who is an independent home improvement contractor (the “Contractor”), perform certain energy-efficient home improvements (the “Project”) for which the Customer may be eligible for an HVAC Instant Rebate from PSE&G. Details of this Program, including measures and rebate levels, are subject to change or cancellation without prior notice. Funds for the Program are limited and available on a first-come, first-served basis. The contractors who participate in the Program, including the Contractor, may provide a warranty for their work. Neither PSE&G nor the entities it has contracted with to implement the Program (“Program Implementers”) or other New Jersey utilities that may partner with PSE&G or each other on the Program (the “New Jersey Utilities”) warrant the products or services of participating contractors.

APPLICATION/DOCUMENTATION: The incentive claim form, online application, and any required additional documentation, including the homeowner-contractor agreement, must be filled out completely, truthfully, and accurately by the participating Contractor. The Customer should retain a copy of this document and any accompanying documentation submitted to the Program. PSE&G will not be responsible for lost documentation pertaining to this application request. Associated documentation, which must be submitted within 30 days of the installation’s completion, will be required in order to qualify for an HVAC Instant Rebate.

ELIGIBILITY: This offer is valid for PSE&G customers with residential accounts who are applying through PSE&G’s Program only. Customers must receive electric and/or natural gas service from PSE&G. This offer is not valid for new construction, commercial properties, or commercial accounts. Projects must be installed in the PSE&G service territory by a contractor who is in good status as a participating contractor in the Program. If applying for incentives for natural gas and electric measures at the same time through PSE&G, it is prohibited to apply for the same incentive with another electric or gas company.

APPROVAL, VERIFICATION, AND INSPECTION: Prior to the payment of any HVAC Instant Rebate, PSE&G reserves the right to require that the Contractor verify that the installed energy-saving measures meet all applicable building codes; zoning laws; local, state, and federal requirements; and other relevant requirements. The Contractor is responsible for any applicable permits as required by aforementioned codes/laws. Outdoor temperatures may affect this verification process. The Customer’s home may also be selected for a quality control post-installation inspection by PSE&G. No warranty is made, nor should one be implied, as a result of such inspection.

PROOF OF PURCHASE: In order for a Project to qualify for an HVAC Instant Rebate, a copy of an agreement or invoice for eligible HVAC Instant Rebate measures between the Customer and the Contractor must be submitted to the Program as proof of purchase. The contract copy must include a detailed scope

of work indicating HVAC improvements (type, make, and model and serial numbers), water heating measures (type, make, and model and serial numbers), applicable pricing per measure, instant rebate amount provided, home location, and date of installation.

HEALTH AND SAFETY: If any health and safety issues are found at the time of qualifying the Project or thereafter, and if these issues require remediation prior to commencement of the Project, a Program participating Contractor must verify that the proper remediation has been completed prior to starting the recommended HVAC Instant Rebate work. If any health and safety issues are found at the time of installation, the Project will not be considered complete until the Contractor submits documentation that proper remediation of the health and safety issue has been completed.

RIGHT TO REFUSE: The Contractor has the right to refuse service or end the delivery of service if confronted by a Customer acting inappropriately or when facing a situation deemed potentially unsafe or harmful to health or well-being. “Inappropriate” includes but is not limited to the following: unreasonable demands for service, personally threatening or offensive language, threatening or erratic behavior, and personal contact. The Contractor reserves the right to vacate any premises, or vicinity therein, deemed potentially unsafe or harmful to health or well-being.

PAYMENT: The Contractor will provide the Customer’s rebate payment in the form of an instant discount at the time of installation, as reflected on the Customer invoice. No rebate checks will be issued to the Customer.

ADDITIONAL FEES: The Contractor may charge additional nominal fees associated with the Project. The Customer should discuss these additional costs, if any, with the Contractor before signing agreements to begin any Project.

TAX LIABILITY: PSE&G will not be responsible for any tax liability that may be imposed on the Customer as a result of the payment of rebates. The Customer should contact a tax adviser for more information.

FACSIMILE/SCANNED: Facsimile transmission of any signed original document, and the retransmission of any signed facsimile transmission, shall be the same as delivery of the original signed document. Scanned original documents transmitted to PSE&G as an attachment shall be the same as delivery of the original signed document. At the request of PSE&G, the Customer shall confirm documents with a facsimile transmitted signature or a scanned signature by providing the original document.

ENDORSEMENT: PSE&G does not endorse any manufacturer, distributor, product, system design, claim, or contractor in promoting this Program.

INFORMATION RELEASE: The Customer agrees that PSE&G may include the Customer’s name, PSE&G services, and resulting energy savings in reports or other documentation submitted by PSE&G or other New Jersey Utilities to the New Jersey Board of Public Utilities (“NJBPU”). PSE&G will treat all other information gathered in evaluations as confidential and report it only in the aggregate.

LIMITATION OF LIABILITY: The Customer acknowledges and agrees that PSE&G and its Implementation Contractors and each of the New Jersey Utilities' liability is limited to paying the approved HVAC Instant Rebate. The Customer agrees that PSE&G and its Implementation Contractors and the New Jersey Utilities are not liable for any losses, harms, or damages of any nature, whether direct, indirect, incidental, special, or consequential, in any way connected with or resulting from services provided by this Program or participation therein, including any damages relating to safety, health, or well-being. The Customer, on behalf of itself, its heirs, and executors, releases PSE&G, its Implementation Contractors, and the New Jersey Utilities, their parent and affiliated companies, and each of their respective officers, directors, employees, agents and representatives, successors, and/or assigns and agree to hold each of them harmless from all claims, including but not limited to those for injury to persons, including death, or damage to physical and personal property and for all expenses (including attorney's fees and costs) in any way arising from or relating to the Program or the Project.

WARRANTIES: PSE&G DOES NOT WARRANT THE INSTALLATION OR PERFORMANCE OF MEASURES OR INSTALLED EQUIPMENT EXPRESSLY OR IMPLICITLY. PSE&G makes no warranties or representations of any kind, whether statutory, expressed, or implied, including without limitations, warranties of merchantability, or fitness for a particular purpose regarding any energy efficiency measure provided by a participating contractor, manufacturer, or vendor. The Customer may contact the Contractor for details regarding equipment/measure performance and warranties. PSE&G and its Implementation Contractors provide no warranties regarding safety, health, or well-being.

PROPERTY RIGHTS: The Customer represents that it has the right to complete and/or install the energy-saving measures on the property on which those measures are completed and/or installed.

ENERGY SAVINGS AND EVALUATION: PSE&G reserves the right to require evaluation, measurement, and verification (EM&V) tasks performed by PSE&G or its EM&V vender, with all Program participants. EM&V may include Customer surveys, site visits to verify equipment installation and other data gathering, and the use of Customer energy use and billing information. PSE&G or its EM&V vendor will notify the Customer if surveys or on-site visits are required. EM&V tasks may be performed for up to four years following Program participation. By participating in PSE&G's energy efficiency and peak demand reduction programs, the Customer agrees that its electric utility (which may be PSE&G or one of the New Jersey Utilities) will maintain ownership of all Capacity Rights from electric savings measures, which refers to the demand reduction associated with any energy efficiency and peak demand reduction measures for which incentives were provided by PSE&G or one of the New Jersey Utilities. The Customer's electric utility will aggregate these energy efficiency demand reduction attributes into the PJM capacity market as appropriate, with proceeds being used to reduce the Customers' costs for the program.

CONFIDENTIALITY: PSE&G shall treat as confidential all personal information of the Customer and all information furnished by the Customer as part of the Customer's participation in the Program and all data or information derived therefrom ("Confidential Information"). Confidential Information shall not include (i) information that was already in the possession of a Permitted Recipient (as defined below) at the time of its disclosure; (ii) information that becomes public after disclosure through no fault of a Permitted Recipient; (iii) information that is obtained from a third party that had an unrestricted right to disclose it; (iv) information that is required to be disclosed pursuant to a court order or an applicable law or regulation; and (v) information that is independently developed by a Permitted Recipient. PSE&G may disclose Confidential Information to its employees, contractors, advisors, subcontractors, and representatives who have a need to know such information for purposes of the Program and to the

NJBPU and other New Jersey Utilities ("Permitted Recipients") but shall not otherwise disclose Confidential Information to any other person or entity without the Customer's express authorization. Confidential Information shall not be used for any purpose other than in connection with the Program or to support current or future regulated utility programs authorized by the NJBPU and provided by PSE&G or one or more of the New Jersey Utilities. PSE&G may disclose Confidential Information as may be required by law or court order provided that, unless otherwise prohibited by law, the Customer has been given a reasonable time to take legal action to seek appropriate protection of its Confidential Information. The Customer expressly understands and agrees that PSE&G is required to report to New Jersey regulators on a periodic basis Program data ("Regulatory Reporting") as well as to prepare and submit to New Jersey regulators a Program Evaluation Report. Nothing contained herein shall prohibit PSE&G from disclosing aggregated data, whether or not such aggregated data was derived in whole or in part from Confidential Information.

CUSTOMER'S CERTIFICATION: By signing below, the Customer certifies that it has authorized the installation of the measures detailed on the Incentive Claim Form submitted in connection with this application, provided proof of Low/Moderate Income verification (if applicable) to the Contractor, and reviewed and understands the above Terms and Conditions for participating in PSE&G's HVAC Instant Rebate Program.

CUSTOMER STATEMENT AND REBATE ASSIGNMENT: I certify that I have read, completed, and understand the information on this form. I hereby agree to make my house available to the HVAC Instant Rebate Program for a quality control inspection if requested, and I authorize the Contractor who worked on my project to release information to PSE&G, or its designee, to evaluate my energy use in order to identify potential and actual energy savings. I understand that the PSE&G HVAC Instant Rebate Incentive Claim Form cannot be processed unless the online rebate application is complete, and all supporting documentation has been submitted online by the participating HVAC Instant Rebate Contractor. I also hereby acknowledge that the PSE&G HVAC Instant Rebate in the amount set forth below was provided to me at the time of installation in the form of a discount on the costs of the Project.

Total Installation Cost (equipment and labor):

\$

Total PSE&G Instant Rebate Amount Homeowner Received:

\$

Total Partner Utility Rebate Amount Homeowner Received:

\$

Total Enhanced LMI Incentive Provided (if applicable):

\$

Homeowner Signature

Date