

HVAC Instant Rebates Program

Incentive Claim Form for Partner Utility Projects



Participating Contractor Instructions

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 date between January 1, 2025, and June 30, 2027 (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		
Is this customer eligible for the enhanced Low- to Moderate-Income (LMI) incentive? (if yes, see page 6):		☐ Yes	☐ No		
Homeowner name:		Installation address:			
City:	County:	State:	ZIP:		
Homeowner phone #:		Homeowner email:			
Service type: ☐ Gas ☐ Electric ☐ Both		PSE&G account number:			
Contractor company name:					
Contractor contact name:		NJ HVAC license #:			
Contractor phone #:		Contractor email:			
Participating distributor name #1:		Participating distributor #1 equipment:			
Participating distributor name #2:		Participating distributor #2 equipment:			

Customer Utility Account Information (must provide gas and electric utility account numbers below)

Gas		Electric	
☐ Elizabethtown		☐ Atlantic City Electric	
☐ New Jersey Natural Gas		☐ Rockland Electric Co.	
☐ South Jersey Gas		☐ Municipal Electric Co.	
		☐ JCP&L	

ELECTRIC | SEER2 | Residential HVAC and Water Heater Equipment

(Effective 1/1/25)

Electric Measure Description	Minimum Efficiency Requirements [*]	PSE&G Incentive	ACE	JCP&L	RECO	Total Rebate
Central air conditioning split system – Tier 1	SEER2 ≥ 15.2, EER2 ≥ 12	\$60	\$100	\$100	\$70	\$
Central air conditioning split system – Tier 2	SEER2 ≥ 17, EER2 ≥ 12	\$120	\$200	\$200	\$140	\$
Central air conditioning single package – Tier 1	SEER2 ≥ 15.2, EER2 ≥ 12	\$60	\$100	\$100	\$70	\$
Central air conditioning single package – Tier 2	SEER2 ≥ 17, EER2 ≥ 12	\$120	\$200	\$200	\$140	\$
Air-source heat pump split system – Tier 1	SEER2 ≥ 15.2, EER2 ≥ 11.7, HSPF2 ≥ 7.8	\$300	\$500	\$500	\$350	\$
Air-source heat pump split system – Tier 2	SEER2 ≥ 17.1, EER2 ≥ 11.7, HSPF2 ≥ 7.8	\$450	\$750	\$750	\$525	\$
Air-source heat pump single package – Tier 1	SEER2 ≥ 15.2, EER2 ≥ 10.6, HSPF2 ≥ 7.2	\$300	\$500	\$500	\$350	\$
Air-source heat pump single package – Tier 2	SEER2 ≥ 17.1, EER2 ≥ 10.6, HSPF2 ≥ 7.2	\$450	\$750	\$750	\$525	\$
Air-source heat pump – Cold climate	SEER2 ≥ 15.2, EER2 ≥ 10, HSPF2 ≥ 8.1, COP ≥ 1.75 at 5°F and must replace a regular ASHP	\$600	\$1,000	\$1,000	\$700	\$
Heat pump water heater		\$450	\$750	\$750	\$525	\$
Furnace fan	ECM motor install	\$60	\$100	\$100	\$70	\$
Smart thermostat	New installation or replacement of a manual or conventional programmable thermostat, as part of an HVAC install.	\$60	\$100	\$100	\$70	\$

GAS | Residential HVAC and Water Heater Equipment

(Effective 1/1/25)

Gas Measure Description	Minimum Efficiency Requirements [*]	PSE&G Incentive	Etown Gas	NJNG	SJG	Total Rebate
Reset controls for boiler		\$75	\$125	\$125	\$125	\$
Gas boiler – Tier 1	AFUE ≥ 90% – Must replace a non-condensing unit. Condensing to condensing replacement not eligible.	\$540	\$900	\$900	\$900	\$
Gas boiler – Tier 2	AFUE ≥ 95% – Must replace a non-condensing unit. Condensing to condensing replacement not eligible.	\$600	\$1,000	\$1,000	\$1,000	\$
Gas furnace	AFUE ≥ 95% – Must replace a non-condensing unit. Condensing to condensing replacement not eligible.	\$540	\$900	\$900	\$900	\$
Gas combi heat – Tier 1	AFUE ≥ 95%	\$780	\$1,300	\$1,300	\$1,300	\$
Gas combi heat – Tier 2	AFUE ≥ 97%	\$1,050	\$1,750	\$1,750	\$1,750	\$
Gas storage tank water heater – Tier 1	Power-vented < 55 gallons, UEF ≥ 0.64 medium draw pattern, high draw pattern UEF ≥ 0.68	\$240	\$400	\$400	\$400	\$
Gas storage tank water heater – Tier 2	Power-vented ≥ 55 gallons, UEF ≥ 0.78 medium draw pattern, high draw pattern UEF ≥ 0.80	\$240	\$400	\$400	\$400	\$
Tankless water heater – Tier 1	UEF ≥ 0.87	\$300	\$500	\$500	\$500	\$
Tankless water heater – Tier 2	UEF ≥ 0.95	\$450	\$750	\$750	\$750	\$
Indirect fired storage tank water heater	Must be attached to a boiler with an AFUE ≥ 90%	\$150	\$250	\$250	\$250	\$
Furnace fan	ECM motor install	\$60	N/A	N/A	N/A	\$
Smart thermostat	New installation or replacement of a manual or conventional programmable thermostat, as part of an HVAC install.	\$60	\$100	\$100	\$100	\$

HVAC and Water Heater Equipment Information

Electric Measure #1:	Manufacturer:	Model:	AHRI certificate number.:
	Outdoor serial number:		Indoor serial number:
Electric Measure #2:	Manufacturer:	Model:	AHRI certificate number.:
	Outdoor serial number:		Indoor serial number:
Gas Measure #1:	Manufacturer:	Model:	AHRI certificate number.:
	Serial number:		
Gas Measure #2:	Manufacturer:	Model:	AHRI certificate number.:
	Serial number:		
Smart Thermostat (Maximum of two smart thermostats installed per project)	Manufacturer:		Model:
	Serial Number:		
	ENERGY STAR ID#:		

Please provide photos of the existing equipment type being replaced.

Existing/New Equipment

Is the existing electric and/or gas equipment still in working condition? ☐ Yes ☐ No

• If no, what is the existing equipment type being replaced?

What is the date of installation for the new equipment?

What is the efficiency of the existing heating equipment?

What is the existing fuel type? ☐ Electric ☐ Gas ☐ Other ☐ None

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

Air Source Heat Pumps Cold Climate

Does the new equipment serve any rooms that did not have heating before? ☐ Yes ☐ No

Does the new equipment serve any rooms that did not have cooling before? ☐ Yes ☐ No

Does your new system supplement another primary system, or is your new system your primary system? ☐ Yes ☐ No

Was the system selected according to Manual S criteria based on Manual J loads? ☐ Yes ☐ No

Air Source Heat Pumps Cold Climate

Is the ccASHP replacing a furnace or boiler? ☐ Yes ☐ No

- If yes, the project may qualify for incentives through the Building Decarbonization Program. For more information, please contact your account manager.

- If no, what is the existing equipment type being replaced?

Water Heaters

Does the new water heater replace the same type of unit? ☐ Yes ☐ No

- If no, what is the existing unit being replaced?

Is the UEF of the existing unit equal or higher than the new unit? ☐ Yes (replacement not allowed) ☐ No

If installing a Heat Pump Water Heater, is the unit installed in a Conditioned or Unconditioned Space? ☐ Conditioned ☐ Unconditioned

Smart Thermostats

What type of HVAC system will the thermostat control? (Select all that apply)

- ☐ Air-source heat pump (ASHP)
- ☐ Mini-Split heat pump (MSHP)
- ☐ Ground-source heat pump (GSHP)
- ☐ Central air conditioner
- ☐ Furnace
- ☐ Boiler
- ☐ Electric resistance

What type of unit is the thermostat controlling?

- ☐ Combo (cooling and heating)
- ☐ Cooling-only
- ☐ Heating-only

For heating-only and combo units, please specify the heating type:

- ☐ Electric
- ☐ Gas
- ☐ Other
- ☐ None

Residential HVAC and Water Heating – Incentive Summary

PSE&G HVAC instant rebate amount owed:	\$
Partner utility rebate amount owed:	\$
Enhanced LMI incentive provided (if applicable):	\$
Total rebate amount:	\$

* SEER is seasonal energy efficiency ratio. EER is energy efficiency ratio. HSPF is heating season performance factor. SEER, EER, and HSPF ratings are determined by entering the model number of the indoor coil, the outdoor unit and, in many cases, the air handler/furnace into the AHRI directory (ahridirectory.org). UEF is uniform energy factor.

Enhanced Low- to Moderate-Income (LMI) Incentive

Enhanced LMI Application Instructions

New Jersey LMI customers may be eligible for an enhanced LMI incentive of \$300 per measure (with the exception of smart thermostats, limit of two installed per project). To be eligible for this offer, the customer must provide the installation contractor with one of the following as proof of eligibility prior to project completion.

Low- to Moderate-Income Verification

OPTION 1: ☐ Primary residence must be located within a low- or moderate-income census tract and must be willing to self-certify household income meets the below eligibility guidelines. Verify your census tract at geomap.ffiec.gov/FFIECGeocMap/GeocodeMap1.aspx

OPTION 2:

Participates in one of the following safety net programs:

- | | |
|--|---|
| ☐ General Assistance (GA) | ☐ Section 8 Housing Assistance |
| ☐ Lifeline | ☐ Supplemental Nutrition Assistance Program (SNAP) |
| ☐ Low Income Home Energy Assistance Program (LIHEAP) | ☐ Supplemental Security Income (SSI) |
| ☐ New Jersey SHARES (NJ SHARES) | ☐ Temporary Assistance for Needy Families (TANF) |
| ☐ Payment Assistance for Gas and Electric (PAGE) | ☐ Universal Service Fund (USF) |
| ☐ Pharmaceutical Assistance to the Aged and Disabled (PAAD) | |

OPTION 3: Has an annual household income that is below 400% of the Federal Poverty Levels (see 2025 chart below):

Maximum Household Income Based on 2025 Federal Poverty Levels			
Size of Family	Weekly Income	Monthly Income	Yearly Income
1	\$1,204	\$5,217	\$62,600
2	\$1,627	\$7,050	\$84,600
3	\$2,050	\$8,883	\$106,600
4	\$2,473	\$10,717	\$128,600
5	\$2,896	\$12,550	\$150,600
6	\$3,319	\$14,383	\$172,600
7	\$3,742	\$16,217	\$194,600
8	\$4,165	\$18,050	\$216,600
Each add.	\$423	\$1,833	\$22,000

For **OPTION 3:** Customers must prove all earned income information for everyone 18 years and older who resides in the household (unearned income will account for every member of the home). A list of acceptable forms of proof is provided below:

- | | | |
|--|---|---|
| ☐ Pay stubs for the last four consecutive weeks within eight weeks of the application | ☐ Award letter for pension, veteran and disability, Social Security, or SSI benefits (including children benefits) | ☐ Rental income: lease for all residents and/or rent receipts, or notarized vacancy agreement letter |
| ☐ Two consecutive pay stubs if paid twice a month or every two weeks | ☐ Unemployment benefits: copy of award statement or two benefit pay stubs | ☐ TANF or general assistance (welfare): award letter or printout |
| ☐ If self-employed, latest federal income tax statement with supporting documentation | ☐ Child support/alimony: statement of total monthly support | ☐ Interest or dividends: bank statement, investment company statement |
| ☐ If a full-time student, a letter on school letterhead | | |

Enhanced LMI Verification Acknowledgment

By signing below, I acknowledge that I have provided information regarding LMI eligibility to the contractor and that such information is true, correct, and accurate in all respects. I understand that I may be contacted by PSE&G to confirm and verify proof of eligibility at a later date and understand that if I give false or misleading information, or if I withhold information in order to make myself eligible for a rebate or incentive that I am not entitled to, I may be subject to criminal or civil liability.

Customer Signature: _____ Date: _____

Customer Participation Agreement

Program Proposal

This Customer Participation Agreement (“Agreement”) sets forth the proposal for the undersigned utility customer (“Customer”) to participate in the PSE&G HVAC Instant Rebates Program (the “Program”). The Customer hereby proposes to have the HVAC Instant Rebates 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.

Terms and Conditions

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 agrees 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.

Customer Participation Agreement

Terms and Conditions (Cont.)

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 vendor, 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, advisers, 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 they have authorized the installation of the measures detailed on the invoice submitted in connection with this application, provided proof of low- to moderate-income verification (if applicable) to the Contractor, and reviewed and understand the above Terms and Conditions for participating in PSE&G's HVAC Instant Rebates 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 Rebates 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 Rebates 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 Rebates 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