



# 2016 Commercial Incentives: Heat Pump

PLEASE complete ALL sections and sign form to ensure proper and prompt payment of rebate.

## Customer Information

Company		Account Number		Phone	
Facility Address (equipment location)		City		State	Zip Code
Mailing Address (if different than facility address above)		City		State	Zip Code
First Name (contact person)		Last Name		E-mail Address	

ACCOUNT TYPE where equipment is located:  Farm  Small Business  Commercial/Industrial

GENERAL BUSINESS DESCRIPTION: \_\_\_\_\_ (e.g. Manufacturing, School, Grocery, Office, etc.)

## Installation and Equipment Information

<p>YEAR BUILDING BUILT (approx.) <input type="text"/></p> <p>HEATED AREA (sq. ft.) <input type="text"/></p> <p>TYPE OF HEAT PUMP EQUIPMENT:</p> <p><input type="radio"/> Geothermal - Closed Loop <input type="radio"/> STD Air Source Heat Pump (ASHP)*</p> <p><input type="radio"/> Geothermal - Open Loop <input type="radio"/> ENERGY STAR® ASHP*</p> <p><input type="radio"/> Water Source - Boiler/Tower <input type="checkbox"/> *Check if packaged units</p> <p>DATE INSTALLED <input type="text"/></p> <p>TYPE OF SYSTEM REPLACED:</p> <p><input type="radio"/> New Construction <input type="radio"/> Air Source Heat Pump</p> <p><input type="radio"/> Added Capacity <input type="radio"/> Geothermal Heat Pump</p> <p><input type="radio"/> Natural Gas <input type="radio"/> Water Source - Boiler/Tower</p> <p><input type="radio"/> LP <input type="radio"/> Electric Resistance</p> <p><input type="radio"/> Oil</p> <p>AGE OF SYSTEM REPLACED? (yrs) <input type="text"/> Enter N/A if not applicable</p> <p>SECONDARY HEATING SYSTEM:</p> <p><input type="radio"/> NONE <input type="radio"/> Oil</p> <p><input type="radio"/> Natural Gas <input type="radio"/> Electric Resistance</p> <p><input type="radio"/> Propane <input type="radio"/> Other</p> <p>INSTALLING CONTRACTOR:</p> <table border="1"> <tr><td colspan="3">Business Name (retailer or installing contractor)</td></tr> <tr><td colspan="3">Address</td></tr> <tr><td>City</td><td>State</td><td>Zip Code</td></tr> </table>	Business Name (retailer or installing contractor)			Address			City	State	Zip Code	<p>ENGINEERING FIRM (responsible for HVAC equipment specification):</p> <table border="1"> <tr><td colspan="3">Business Name (retailer or installing contractor)</td></tr> <tr><td colspan="3">Address</td></tr> <tr><td>City</td><td>State</td><td>Zip Code</td></tr> </table> <p style="text-align: center;"><b>Equipment Information</b></p> <p><b>Must submit applicable Commercial Equipment Worksheet</b></p> <p>TOTAL TONS INSTALLED* (from worksheet) <input type="text"/></p> <p>TOTAL INSTALLED SYSTEM COST <input type="text"/></p> <p>* Add total of worksheet subtotals and round to nearest whole tons.</p> <p style="text-align: center;"><b>Incentive Summary</b></p> <p style="text-align: center;">Rebate can be calculated using Rebate Worksheet or left blank and it will be calculated for you.</p> <table border="1"> <tr> <td rowspan="3" style="vertical-align: middle;">Please Do Not Use Shaded Areas</td> <td>Heat Pump Equipment</td> <td style="background-color: #cccccc;"></td> <td style="background-color: #cccccc;"></td> </tr> <tr> <td>Contractor Incentive</td> <td style="background-color: #cccccc;"></td> <td style="background-color: #cccccc;"></td> </tr> <tr> <td style="text-align: center;"><b>REBATE</b></td> <td></td> <td></td> </tr> </table> <p style="text-align: center;"><u>Attach equipment worksheets and copy of sales invoice</u></p>	Business Name (retailer or installing contractor)			Address			City	State	Zip Code	Please Do Not Use Shaded Areas	Heat Pump Equipment			Contractor Incentive			<b>REBATE</b>		
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## Customer and Vendor Agreement

By signing below, Customer and contractor/vendor agree to the Terms and Conditions (see back or separate page) for this program.

Customer Name/Title		Contractor/Vendor Name/Title	
Customer Signature	Date	Contractor/Vendor Signature	Date
<b>Office Use Only:</b>		Notes:	Authorized Amount
Utility ID	Employee Name		

## Terms and Conditions - Commercial Heat Pump Incentives

**Program Offer:** The Program covers products purchased and/or services rendered on or after **January 1, 2016**.

### Air Source Heat Pump (ASHP) Requirements:

- Air Source Heat Pumps must meet federal minimum efficiency requirements and have a minimum capacity of 0.75 tons. Units must be listed in the AHRI Unitary Directory, provided online at: [www.ahridirectory.org](http://www.ahridirectory.org).
- To be eligible for ENERGY STAR® Bonus incentives, units must meet current ENERGY STAR program requirements for Air Source Heat Pumps and have a minimum capacity of 1.5 tons. As of 1/1/2016 the following energy efficiency minimums shall be required to receive the ENERGY STAR Bonus rebate:

<b>MINIMUM Energy Efficiency Criteria for ENERGY STAR Qualified Residential Air Source Heat Pumps (effective 09/15/15)</b>			
Product Type	SEER	EER	HSPF
ASHP Split Systems	15.0	12.5	8.5
Single Package ASHP	15.0	12.0	8.2

<b>MINIMUM Energy Efficiency Criteria for ENERGY STAR Qualified Light Commercial Heat Pumps (effective 5/1/10)</b>				
Product Type	SEER	EER	HSPF	COP
Split System (3-phase) <65,000 Btuh	14.0	11.0	8.2	--
Single Package (3-phase) <65,000 Btuh	14.0	11.0	8.0	--
All ASHP ≥ 65,000 and < 135,000 Btuh	11.4 IEER	11.3	--	3.35
All ASHP ≥ 135,000 and < 240,000 Btuh	11.0 IEER	10.9	--	3.25

- When installing a split system, both a new outdoor unit (condenser) and a new indoor A-coil (evaporator) must be installed.
- Rebates for Air Source Heat Pumps are based on the unit cooling tons. The unit capacity for qualified units is rated in the AHRI Unitary Directory by its output in "Btuh." This amount must be divided by 12,000 to determine the number of tons.

**IMPORTANT NOTE:** An ENERGY STAR label on equipment does not guarantee that a product qualifies for this incentive (refer to requirements 1-2 above). Current ENERGY STAR information, specifications and eligible equipment lists can be found at [www.energystar.gov](http://www.energystar.gov).

### Geothermal and Water Source Heat Pump Equipment Requirements:

- Equipment must be listed in the AHRI Applied Directory for WBAHP equipment meeting ISO Standard 13256-1 or 13256-2. Data (including capacity) must be obtained from the appropriate section as follows:
  - WLHP Ratings required for Water Source equipment rebate.
  - GWHP Ratings required for Open Loop geothermal equipment rebate.
  - GLHP Ratings required for Closed Loop geothermal equipment rebate.
- Size of unit used to determine rebate is based on the cooling capacity listed in the appropriate section of the AHRI Applied Directory. This information can be verified online for a given brand and model number at: [www.ahridirectory.org](http://www.ahridirectory.org).
- Closed or open loop heat exchangers must be designed to maintain water temperatures within AHRI performance test parameters for the type of equipment and rebate being considered.
- Units rated only as water loop heat pump (WLHP) equipment must use water that is temperature controlled by a system such as a boiler/cooling tower. These units only qualify for Water Source system rebates.

- Contact the Utility if installing Hydronic units used for domestic water heating or pool heating. These may qualify for incentives but will NOT qualify for special heat rate programs unless units also provide space heating.
- Open loop systems must return water to the aquifer through a reinjection well. (No "pump and dump.")
- Rebates will be paid per 1/2-ton increment with the capacity determined using the appropriate ISO Standard 13256.

**NOTE:** The mechanical engineer or equipment specifier and installing contractor should be able to provide Customers with the information necessary to complete the application for this program. Both should be made aware of program requirements prior to installation to ensure that a qualifying system is specified and both must sign this document.

If there are doubts about program eligibility, you should contact the Utility before the installation to ensure that the specified equipment does qualify.

**Eligibility:** The Participating Customer must ultimately own the equipment, either through an up-front purchase or at the end of a short-term lease. Equipment procured by Customers through another program offered by the Utility may not be eligible for a rebate through this Program.

### General Terms and Conditions

The Utility must supply all electricity to the equipment for which the rebate is being paid.

**Application Information:** Missing or incorrect information on the application may delay processing and delivery of the rebate. An invoice is required and should include specific product information, including the brand, model, serial number and date of purchase of the energy efficient measures. Other information including manufacturer's equipment performance sheets may be required upon request.

The Utility reserves the right to verify sales transactions and to have reasonable access to the Customer's facility to inspect pre-existing equipment (if applicable) and energy efficient measures installed under this program.

**Warranty Information:** The Utility makes no warranties, expressed or implied, with respect to equipment operation, material, workmanship or manufacturing. The Utility does not guarantee that a certain level of energy or cost savings will result from the use of products covered by this program.

**Limitation of Liability:** The Utility's liability in connection with this program is limited to paying the rebate specified when all terms and conditions have been satisfied. Under no circumstances shall the Utility be liable for any consequential or incidental damages or tax liability resulting from participation in this program.

**Participant Certification:** Participating Customer certifies that he/she purchased and installed the equipment listed on their application at the defined location served by the Utility. The Customer agrees that all information provided is true and that he/she has conformed to all program requirements. If the equipment and application does not comply with the Utility's rules and qualifications, the rebate amount may be denied or adjusted.

**Program Changes/Termination:** The Utility reserves the right to extend, modify (including incentive levels) or terminate this Program at any time without prior or further notice. The Customer is responsible for checking with the Utility to determine whether the program has been changed or is still in effect.

**Customers must apply for rebates within six (6) months of the purchase date (as shown on the Customer's invoice).** Past eligibility, however, does not guarantee that equipment will meet criteria for current programs in effect.

Mechanical Engineer Signature (or person responsible for equipment specifications)	Date
Member Signature (company representative)	Date

## Commercial Heat Pump Incentives - Rebate Worksheet

Company	Account Number	Date
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### Rebate Calculations:

All calculations require the Total System Tons (calculated from subtotals of all Equipment Worksheets)

Total Cooling Capacity / 12,000 = # of Tons:

The commercial heat pump rebate is a per ton value that drops after the total system size exceeds 40 ton. The corresponding rebate (per ton) for each block is multiplied by the number of tons in each block.

If there are questions in filling out this form, please call the Utility. If you prefer to skip this section, then complete the main incentive form and equipment worksheets and the rebate can be calculated for you by the Utility.

Geothermal and Water Source Heat Pump Incentives			
Geothermal Closed Loop System			
	TONS	Rebate Per Ton	REBATE
First 40 Tons	x	\$350	=
Remaining	x	\$175	=
<b>Total Rebate</b>			\$ _____
Maximum: \$50,000 Per Customer			

Geothermal Open Loop System			
	TONS	Rebate Per Ton	REBATE
First 40 Tons	x	\$250	=
Remaining	x	\$125	=
<b>Total Rebate</b>			\$ _____
Maximum: \$30,000 Per Customer			

Water Source System			
	TONS	Rebate Per Ton	REBATE
First 40 Tons	x	\$150	=
Remaining	x	\$75	=
<b>Total Rebate</b>			\$ _____
Maximum: \$25,000 Per Customer			

Geothermal and Water Source Unit Replacement			
	TONS	Rebate Per Ton	REBATE
First 200 Tons	x	\$75	=
<b>Total Rebate</b>			\$ _____
Maximum: \$15,000 Per Customer			

Air Source Heat Pump (ASHP) Incentives			
Standard ASHP (Split or Packaged)			
	TONS	Rebate Per Ton	REBATE
First 40 Tons	x	\$150	=
Remaining	x	\$50	=
<b>Total Rebate</b>			\$ _____
Maximum: \$15,000 Per Customer			

ENERGY STAR ASHP (Split or Packaged)			
	TONS	Rebate Per Ton	REBATE
First 40 Tons	x	\$200	=
Remaining	x	\$100	=
<b>Total Rebate</b>			\$ _____
Maximum: \$25,000 Per Customer			

Contractor Incentives			
Contractor Incentive - All Heat Pump Equipment			
TONS*		Rebate Per Ton	REBATE
	x	\$40	=
* Contractor Incentive only applicable to first 50 tons (\$2,000 maximum)			

**Must complete "Commercial Heat Pump Incentives" (Form C4) and the appropriate equipment worksheets for your type of system.**