

## Residential Air Source Heat Pump

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

### Member Address Information (person receiving rebate) Check if wind or solar generation is installed.

First Name	Last Name	Account Number	Phone
Address		City	State Zip Email Address

### Equipment Location Information Check if same address as above:

First Name	Last Name	Account Number	Phone
Address		City	State Zip Email Address

Check the ACCOUNT TYPE where equipment is located:

<input type="radio"/> Residence Only	<input type="radio"/> Farm Only	<input type="radio"/> Apart.Bldg/Unit
<input type="radio"/> Resid./Farm	<input type="radio"/> Business Only	
<input type="radio"/> Resid./Business	<input type="radio"/> Commercial/Indust.	

Check if you are a builder/developer and building is not yet owned by live-in residents: "Spec Building"

### Installation and Equipment Information

<p>YEAR HOUSE BUILT (approx.) <input style="width: 100px;" type="text"/></p> <p>CONDITIONED AREA (sq. ft.) <input style="width: 100px;" type="text"/></p> <p>NEW HEAT PUMP EQUIPMENT INSTALLED:</p> <p><input type="radio"/> Cold Climate Air Source Heat Pump</p> <p><input type="radio"/> Standard Air Source Heat Pump</p> <p><input type="radio"/> ENERGY STAR® Air Source Heat Pump</p> <p><input type="radio"/> Hybrid Add-On (gas backup) Lockout Set Point <input style="width: 50px;" type="text"/> °F</p> <p>DATE INSTALLED <input style="width: 100px;" type="text"/></p> <p>TYPE OF SYSTEM REPLACED:</p> <p><input type="radio"/> New Construction   <input type="radio"/> Natural Gas   <input type="radio"/> Air Source Heat Pump</p> <p><input type="radio"/> Added Capacity   <input type="radio"/> Oil   <input type="radio"/> Geothermal Heat Pump</p> <p><input type="radio"/> Propane   <input type="radio"/> Wood   <input type="radio"/> Electric Resistance</p> <p>AGE OF SYSTEM REPLACED? (yrs) <input style="width: 50px;" type="text"/> Enter N/A if not applicable</p> <p>INSTALLER: <input type="radio"/> Owner   <input type="radio"/> Utility   <input type="radio"/> Contractor</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <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	<h4>HEATING EQUIPMENT SPECIFICATIONS</h4> <p>AHRI REFERENCE NUMBER <input style="width: 100px;" type="text"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">OUTDOOR Condenser</th> <th style="width: 50%;">INDOOR Coil</th> </tr> </thead> <tbody> <tr><td>Manufacturer/Brand</td><td>Manufacturer/Brand</td></tr> <tr><td>Model Number</td><td>Model Number</td></tr> <tr><td>Serial Number</td><td>Serial Number</td></tr> </tbody> </table> <p>COOLING CAPACITY (tons) <input style="width: 50px;" type="text"/> <i>Round to nearest 0.5 ton</i></p> <p>AUXILIARY RESISTANCE (kW) <input style="width: 50px;" type="text"/></p> <p>SEER (seasonal cooling efficiency) <input style="width: 50px;" type="text"/> <i>Must be ENERGY STAR qualified system to receive ENERGY STAR bonus</i></p> <p>HSPF (heating efficiency rating) <input style="width: 50px;" type="text"/></p> <p>EER (steady-state cooling efficiency) <input style="width: 50px;" type="text"/></p> <p>SECONDARY HEATING SYSTEM:</p> <p><input type="radio"/> NONE   <input type="radio"/> Oil   <input type="radio"/> Resistance</p> <p><input type="radio"/> Natural Gas   <input type="radio"/> Wood</p> <p><input type="radio"/> Propane   <input type="radio"/> Other</p> <p>INSTALLED SYSTEM COST <input style="width: 100px;" type="text"/></p>	OUTDOOR Condenser	INDOOR Coil	Manufacturer/Brand	Manufacturer/Brand	Model Number	Model Number	Serial Number	Serial Number
Business Name (retailer or installing contractor)																		
Address																		
City	State	Zip Code																
OUTDOOR Condenser	INDOOR Coil																	
Manufacturer/Brand	Manufacturer/Brand																	
Model Number	Model Number																	
Serial Number	Serial Number																	

### HEAT PLUS RATE Incentive Summary

Use Electric Heating Equipment Rate form (R1) for existing equipment rate change.

Check if Heat Plus Rate is being applied for the first time.

HEAT RATE ACCOUNT #   
(if different than shown for equipment location above)

Air Source Heat Pump Equipment		
Please Do Not Use Shaded Areas		
<b>REBATE</b>		

*Attach copy of sales invoice. See back of form for applicable rebates.*

### Member Agreement (Must Sign)

I verify that the above described equipment was installed on the date and location specified. I agree to all program requirements provided (either separately or on back of this form) and that my electric Cooperative reserves the right to inspect all equipment and verify information before issuing a rebate.

Member Signature	Date
Office Use Only:	
Cooperative ID	Notes:
Employee Name	Authorized Amount

## Terms and Conditions - Air Source Heat Pump Equipment and Rate Incentives

**Program Offer:** The Program covers products purchased and/or services rendered on or after **January 1, 2023**.

### Air Source Heat Pump (ASHP) Requirements

1. Eligible equipment includes air source heat pump, mini-split heat pumps and multi-split heat pumps.
2. Air source heat pumps must meet current federal minimum efficiency requirements and have a minimum capacity of 0.5 tons. Units must be rated in the *AHRI Certification Directory* (published by the Air-Conditioning Heating & Refrigeration Institute) which is available on-line at [www.ahridirectory.org](http://www.ahridirectory.org).
3. The ENERGY STAR® bonus incentive is only available for residential members, with a limit of 2 bonus payments per home. To be eligible, a unit must meet current ENERGY STAR program requirements for air source heat pumps and have a minimum system capacity of 1.5 tons. Cold Climate eligible products are not eligible for this bonus, but will receive a higher per ton rebate if they are on the list at: <https://ashp.neep.org/>.
4. The minimum SEER and EER efficiencies on this form are the values required for ENERGY STAR qualified equipment at the time this form was published. ENERGY STAR requirements periodically change and the Member is responsible to ensure that their system meets the current ENERGY STAR criteria in effect at the time of installation.

#### Energy Efficiency Criteria for ENERGY STAR Bonus Qualified Residential Air Source Heat Pumps (effective 1/1/2020)

Product Type	SEER	EER	HSPF
Split Systems (Central and Mini-Splits)	≥15.0	≥12.5	≥ 8.2

5. When installing a split system (most common type of residential unit) both a new outdoor unit (condenser) and a new indoor A-coil (evaporator) must be installed.
6. A hybrid air source heat pump (ASHP) system is the combination of an ASHP with a propane or natural gas furnace. The indoor evaporator A-coil and controls for qualifying Hybrid or Add-On heat pumps must be integrated with a new or existing gas furnace.
7. Eligible Hybrid/Add-on heating systems must be designed with maximum backup size of 3 kW of resistance. When heating requirements exceed the capability of the ASHP unit plus the resistance, the ASHP should be de-energized and the integrated gas furnace should be utilized.
8. Rebates for air source heat pumps are based on the unit capacity for as expressed in cooling tons. The capacity rating provided in the *AHRI Directory* is expressed in "Btuh." This amount must be divided by 12,000 to determine the number of tons (round to nearest half ton). Installing contractors should have this information or it can be found at [www.ahridirectory.org](http://www.ahridirectory.org).

#### IMPORTANT NOTE:

**An ENERGY STAR® label on equipment does not guarantee that the product qualifies for this incentive. Refer to requirements 3 and 4 above to determine eligibility.** Current ENERGY STAR® information, specifications and eligible non-AHRI listed equipment can be found at [www.energystar.gov](http://www.energystar.gov).

### Locating Cold Climate Air Source Heat Pumps

All products listed on the website: <https://ashp.neep.org/> are eligible for this rebate. These products are not eligible for the Energy Star® Bonus.

### Locating ENERGY STAR® Heat Pumps

A database for equipment that is ENERGY STAR® qualified or better, that also contains AHRI certified ratings is located at [www.ceedirectory.org/](http://www.ceedirectory.org/) (not for room heat pump units).

Product Type	Incentive
Cold Climate Air Source Heat Pump	\$450 per Ton
Standard Air Source Heat Pump	\$150 per Ton
ENERGY STAR® Heat Pump	\$200 per Ton + \$250 bonus
Hybrid Add-On Heat Pump (gas backup)	Additional \$100 per Ton

### Heat Plus Rate Program Requirements

1. The primary heating system must be electric and metered separately.
2. The primary electric heating source must operate first, with any backup system operating only when the primary system is unable to satisfy the indoor thermostat setting.
3. An electric water heater (storage, heat pump or supplemental solar) must be installed and provide 100% of the domestic water heating for the home.
4. The space heated by the primary electric system must be an area of 400 square feet or more.
5. This rebate for the Heat Plus rate is only available to the building owner. The rate is applicable to all ratepayers (including renters) with eligible heating systems.

### Qualifying Heat Plus Facilities

The following facilities can qualify for the Heat Plus rate:

- Single family residential dwellings and/or their outbuildings.
- Residential apartments and multi-family buildings (e.g. nursing homes and assisted living complexes). May not apply to large complexes with individual meters.
- Buildings or facilities that 1.) are served by one or more transformers with a combined rated capacity of 75 kVA or less, or 2.) maintain an actual combined peak of 75 kW or less.
- Separately metered building spaces that maintain an actual combined peak of 75 kW or less.

**Note:** The Heat Plus rate is not to be applied to periodic heating applications or to heating during peak winter conditions only. A system where the building is totally unheated during unoccupied times is unacceptable.

The Cooperative reserves the right to suspend the rate and remove metering equipment owned by the Cooperative if the Member is no longer using the equipment on a regular basis or is in violation of any program requirement.

## Terms and Conditions - Air Source Heat Pump Equipment and Rate Incentives

**Program Offer:** The Program covers products purchased and/or services rendered on or after **January 1, 2023**.

### General Terms and Conditions

Rebates shall be pro-rated based on the percent of power supplied by the utility if the customer has distributed generation.

**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) and are subject to the current year program offer if received after January 31st.** Past eligibility, however, does not guarantee that equipment will meet criteria for current programs in effect.

**Rebate forms must be returned by 1/31/2024.**