



Commercial Heat Pump Incentives

PLEASE PRINT: 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
Mailing Address (if different than facility address above)		City	State Zip
First Name (contact person)	Last Name	E-mail Address	

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

GENERAL BUSINESS DESCRIPTION: _____ Example: Convenience Store, Manufacturing, School, Grocery, Office, etc.

INSTALLATION INFORMATION

<p>YEAR BUILDING BUILT <input style="width: 100px;" type="text"/></p> <p>HEATED AREA (sq. ft.) <input style="width: 100px;" 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</p> <p style="text-align: right;">*Check if packaged units <input type="checkbox"/></p> <p>DATE INSTALLED <input style="width: 100px;" type="text"/></p> <p>TYPE OF HEATING 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 style="width: 100px;" type="text"/></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" 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	<p>ENGINEERING FIRM (responsible for HVAC equipment specification) :</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
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EQUIPMENT INFORMATION																			
<u>Must submit applicable Commercial Equipment Worksheet</u>																			
TOTAL TONS INSTALLED* (from worksheets)	<input style="width: 100px;" type="text"/>																		
TOTAL INSTALLED SYSTEM COST	<input style="width: 100px;" type="text"/>																		
* Add total of worksheet subtotals and round to nearest whole tons																			
INCENTIVE SUMMARY																			
Rebate can be calculated using Rebate Worksheet or left blank and it will be calculated for you.																			
Please Do Not Use Shaded Areas	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Heat Pump Equipment</td> <td style="width: 15%;"></td> <td style="width: 15%;"></td> </tr> <tr> <td>Contractor Incentive</td> <td></td> <td></td> </tr> <tr> <td>Total Rebate \$</td> <td></td> <td></td> </tr> </table>	Heat Pump Equipment			Contractor Incentive			Total Rebate \$											
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Attach equipment worksheets and <u>copy of sales invoice</u>																			

CUSTOMER AND VENDOR AGREEMENT

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

Customer Name/Title		Contractor/Vendor Name/Title	
Customer Signature (Required)	Date	Contractor/Vendor Signature	Date
Office Use Only:	Utility ID	Notes:	Authorized Amt
Form C4 1/11	Employee Name		

Terms and Conditions—Commercial Heat Pump Incentives Program

Program Offer: The Program covers products purchased and/or services rendered on or after **January 1, 2010**.

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 on in the *AHRI Unitary Directory*, published by the Air-conditioning Heating & Refrigeration Institute and available as an online database at: 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 1/1/2010 the following energy efficiency minimums shall be required to receive the ENERGY STAR Bonus rebate:

<i>MINIMUM Energy-Efficiency Criteria for ENERGY STAR® Qualified Residential Air Source Heat Pumps (effective 1/1/10)</i>			
Product Type	SEER	EER	HSPF
ASHP Split Systems	14.5	12.0	8.2
Single Package ASHP	14	11.0	8.0

<i>MINIMUM Energy-Efficiency Criteria for ENERGY STAR® Qualified Light Commercial Heat Pumps (effective 5/1/10)</i>				
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	11.3	-	3.35
All ASHP ≥135,000 and <240,000 Btuh	11.0	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.
- Single package units (compressor/blower combination unit) must utilize electricity as the source of heating. These units are often installed on a slab or roof and are not common in residential applications.

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.

Geothermal and Water Source Heat Pump Equipment Requirements:

- Equipment (except hydronic units) must be listed in the ARI Applied Directory for WBAHP equipment meeting ISO Standard 13256-1. Data (including capacity) must be provided under the appropriate column as follows:
 - "WLHP" column; Water Loop Heat Pump, Required for Water Source equipment rebate
 - "GWHHP" column; Ground Water Heat Pump, Required for Open Loop geothermal equipment rebate
 - "GLHP" column; Ground Loop Heat Pump, Required for Closed Loop geothermal equipment rebate
- Size of unit used to determine rebate is based on the cooling capacity listed under the appropriate column of the *AHRI Applied Directory* and can be verified online for a given brand and model number at: 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 equip-

ment and rebate being considered.

- Units rated only as water loop (WLHP) heat pump equipment must use water that is temperature controlled by a system such as a boiler/cooling tower. These units do not qualify for geothermal closed or open loop system rebates.
- Hydronic units are not rated by AHRI. The customer should verify their rebate eligibility before the installation.
 - Manufacturer's data will be used to determine the cooling capacity at AHRI conditions specified for type of rebate being requested
 - Hydronic units may be used for domestic water heating. These will NOT qualify for special heat rate programs.
- Open loop systems must return water to the aquifer through a reinjection well.
- Rebates will be paid per 1/2-ton increment with the capacity determined using the appropriate ISO Standard 13256-1.

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 specified equipment does qualify.

Application and Eligibility Process:

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

Warranty Information:

The Cooperative makes no warranties, expressed or implied, with respect to equipment operation, material, workmanship or manufacturing. The Cooperative 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:

Participating Members agree that the Cooperative's liability, in connection with this Program, is limited to paying the Program Incentive specified (when all Terms and Conditions have been satisfied by the member). Under no circumstances shall the Cooperative be liable for any consequential or incidental damages resulting from participation in this Program. The Cooperative will not be responsible for any tax liability that may be imposed on the member as a result of the payment of Program Incentives.

Participating Member's Certification:

Participating Member certifies that he/she purchased and installed the equipment listed in their application at their defined location served by the Cooperative. Participating Member agrees that all information is true and that he/she has conformed to all of the program and equipment requirements listed in the application.

Program Changes/Termination:

While this rebate program will be in effect for an indefinite period, the Cooperative reserves the right to extend, modify (this includes incentive levels) or terminate this Program without prior or further notice. The member is responsible for checking with the Cooperative to determine whether the program has been changed or is still in effect.

Other Conditions

The Cooperative reserves the right to inspect installations before issuing the rebate. If the application does not comply with the Cooperative's rules and qualifications, the rebate amount may be adjusted.

Members must apply for rebates within 6 months of the purchase date (as shown on the member'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 specification)

Date

Installing Contractor Signature

Date

Customer Signature (company representative)

Date



Commercial Heat Pump Incentives - Rebate Worksheet

Your Touchstone Energy® Cooperative

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 = _____ Tons (Round total tons to nearest ton)

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
1st 40 Tons	×	\$350	=
Remaining	×	\$175	=
Total Rebate			\$ _____
Maximum: \$50,000 Per Customer			

Geothermal Open Loop System			
	TONS	Rebate Per Ton	REBATE
1st 40 Tons	×	\$250	=
Remaining	×	\$125	=
Total Rebate			\$ _____
Maximum: \$30,000 Per Customer			

Water Source System			
	TONS	Rebate Per Ton	REBATE
1st 40 Tons	×	\$150	=
Remaining	×	\$75	=
Total Rebate			\$ _____
Maximum: \$25,000 Per Customer			

Air Source Heat Pump (ASHP) Incentives			
Standard ASHP (Split or Packaged)			
	TONS	Rebate Per Ton	REBATE
1st 40 Tons	×	\$150	=
Remaining	×	\$50	=
Total Rebate			\$ _____
Maximum: \$15,000 Per Customer			

ENERGY STAR ASHP (Split or Packaged)			
	TONS	Rebate Per Ton	REBATE
1st 40 Tons	×	\$200	=
Remaining	×	\$100	=
Total Rebate			\$ _____
Maximum: \$25,000 Per Customer			

All Heat Pump Equipment (except single package units)		
Contractor Incentive—All Heat Pump Equipment		
TONS*	Rebate Per Ton	REBATE
×	\$40	=
*Contractor Incentive only applicable to 1st 50 tons (\$2000 Max.)		

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