

2017 Residential HVAC Incentive Application

Instructions for Use

STEP 1

Determine Eligibility

Verify the utility company listed on the incentive application is your electric utility service provider. Applications for other participating utility service providers can be found at michigan-energy.org.

STEP 2

Product Installation and Receipts

This application is for qualified items installed between January 1, 2017 and December 31, 2017. Save all receipts/invoices for all products for which you plan to request an incentive.

Your receipt or invoice must clearly indicate the equipment type, make, model, serial number, price, date of purchase or installation, and installation address.

STEP 3

Complete and submit your incentive application

Be sure you fill out the application completely. Completed documentation needs to be received within 60 days of installation. For the full program Terms and Conditions please refer to page 6 of your application.

Requirements for Incentive Processing:

- Completed/signed copy of this form
- Copy of sales receipt/invoice indicating:
 - equipment type
 - manufacturer, model and serial number
 - price
 - date of purchase/installation
 - installation address
- AHRI certificate/reference number (for air conditioning incentives)

Submit your completed application and required paperwork to:

Mail: MECA EO Programs, 431 Charmany Drive, Madison, WI 53719

Fax: 608.646.7682

Email: info@michigan-energy.org

**Thank you for participating in
the Energy Optimization program.**





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This application is for qualified items installed between January 1, 2017 and December 31, 2017. Complete applications must be received within 60 days of installation.

I. Member Information

Member Name (as it appears on electric bill):		Phone:		Email:	
Installation Address (where equipment is installed):		City:		State: MI	Zip Code:
Mailing Address (if different than above):		City:		State:	Zip Code:
Electric Utility Account Number (found on monthly bill):		Property Type (check all that apply): <input type="checkbox"/> Single-Family <input type="checkbox"/> Condo <input type="checkbox"/> Townhouse <input type="checkbox"/> Other		Rental Property: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Does home have central AC? <input type="checkbox"/> Yes <input type="checkbox"/> No	Primary fuel for space heating (check one): <input type="checkbox"/> Electricity <input type="checkbox"/> Gas <input type="checkbox"/> Propane <input type="checkbox"/> Oil <input type="checkbox"/> Wood		Check one: <input type="checkbox"/> Existing home <input type="checkbox"/> New construction		

II. Contractor Information (Please submit separate forms if using multiple contractors.)

Company Name:		Contact Name:			
Company Address:		City:		State:	Zip Code:
Phone:		Email:			
HVACR License Number (required):		HVACR Licensee Name:			

III. Incentive Payment Information

Make Incentive Check Payable to (payee): <input type="checkbox"/> Member (skip to signature) <input type="checkbox"/> Landlord (complete below) <input type="checkbox"/> Contractor (complete below)
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Incentive Payment Reassignment - Complete this section only if incentive will be paid to the Landlord or Contractor. IRS form W9 for Payee must be submitted for incentive reassignment.				
Payee Name (as shown on attached W9):				
Mail Check to: <input type="checkbox"/> W9 Address <input type="checkbox"/> Alternate Pay Address (complete below)				
Alternate Pay Address (optional):		City:	State:	Zip Code:

IV. Signature

The EO Residential HVAC Incentive Application cannot be processed unless all of the appropriate fields on this application are complete. This application is valid for equipment installed January 1 – December 31, 2017. I have read and understand the terms and conditions. I certify that the information I have provided is true and correct and the product(s) and/or equipment for which I am requesting an incentive meets the requirements in this application.	
Member Signature:	Date:

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		Quantity Installed	Incentive per Unit	Total Incentive (Qty x Incentive)
Standard Programmable Thermostat † • Must allow different set point schedules for weekdays and weekends • Thermostat must control an HVAC system with an air conditioner and/or electric heat	Manufacturer:	Limit 1	\$20	
	Model #:			
Wi-Fi-Enabled or Smart Occupancy-Sensing Thermostat † • Must feature Wi-Fi connectivity and/or occupancy-sensing capability, such as motion sensors and/or GPS geofencing with setback • Thermostat must control an HVAC system with an air conditioner and/or electric heat	Manufacturer:	Limit 1	\$100	
	Model #:			
New Furnace with ECM Blower Motor *† OR ECM Blower Motor *† • Installed in existing furnace without ECM * OR, • Installed in air handler for electric furnace, air-source or ground-source heat pump *†	Manufacturer:		\$200	
	Model #:			
	Serial #:			
Central Air Conditioning System *† • Minimum SEER 15 **	SEER:		SEER 15.0-15.9 = \$150	
	Manufacturer:		SEER 16.0-16.9 = \$250	
	Model # (indoor):		SEER 17.0-18.9 = \$350	
	Serial # (indoor):		SEER 19+ = \$500	
	Model # (outdoor):			
	Serial # (outdoor):			
	AHRI Ref #:			
Central Air-Source Heat Pump System *† • Minimum SEER 15 **	Check one: <input type="checkbox"/> Central air-source HP <input type="checkbox"/> Mini/multi-split ductless air-source HP		SEER 15.0-15.9 = \$150	
	SEER:		SEER 16.0-16.9 = \$250	
	Manufacturer:		SEER 17.0-18.9 = \$350	
	Model # (indoor):		SEER 19+ = \$500	
	Serial # (indoor):			
	Model # (outdoor):			
	Serial # (outdoor):			
	AHRI Ref #:			

* Must be installed by a contractor.
 ** SEER rating cannot include ECM blower motor, unless this application also includes a Furnace with ECM or ECM Blower Motor for rebate, OR existing furnace or air handler includes an ECM and documentation (in the form of an invoice) for the existing furnace or air handler with ECM is provided with this application. Must replace both the evaporator and condenser coil and must be a matched set. If installing a qualified AC between October 1 and April 30, and the condenser cannot be set, the invoice must include the condenser model and state that equipment will be installed in the spring. Existing furnace or air handler includes an ECM motor and install date and model and serial number of existing furnace is included with the equipment description.
 † Eligible for new construction homes.

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		Quantity Installed	Incentive per Unit	Total Incentive (Qty x Incentive)
Ground-Source Heat Pump *†	EER (full load):	Capacity in tons:	EER 17.0-18.9 = \$350 EER 19+ = \$500	
	<input type="checkbox"/> Open-loop system	<input type="checkbox"/> Closed-loop system		
	<input type="checkbox"/> Water-to-air system	<input type="checkbox"/> Water-to-water system		
	Desuperheater installed? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, you are eligible for the Heat Pump Water Heater incentive on page 5.			
	What type heating system is the new ground-source heat pump replacing? <input type="checkbox"/> electric resistance / electric baseboard heat <input type="checkbox"/> air-source heat pump <input type="checkbox"/> existing ground-source heat pump <input type="checkbox"/> natural gas <input type="checkbox"/> propane <input type="checkbox"/> oil <input type="checkbox"/> wood			
	Manufacturer:			
	Model #:			
	Serial #:			
AHRI Ref #:				
HVAC Combo Bonus † • Install a new ECM blower motor AND new central air conditioning, air-source heat pump or ground-source heat pump system at the same time. • All equipment must qualify individually to be eligible for the bonus.		Limit 1	\$100 Bonus	
Smart HVAC Combo Bonus † • Install a new ECM blower motor AND new central air conditioning, air-source heat pump or ground-source heat pump system AND Wi-Fi-enabled or smart thermostat at the same time. • All equipment must qualify individually to be eligible for the bonus.		Limit 1	\$150 Bonus	
Tune-up Central Air Conditioner/ Air-source Heat Pump (Not eligible for new installations) A comprehensive AC tune-up should include the following: • Clean and inspect outdoor coil • Inspect indoor coil if accessible • Clean or replace air filter • Check amps/voltage • Inspect and lubricate blower • Clean, inspect and lubricate motors • Check thermostat operation and control sequence • Check/adjust refrigerant charge • Confirm proper air flow • Check condensate drain • Clean debris from around condenser • Perform visual inspection of entire AC system	Manufacturer:		Limit 1	\$50
	Model # (outdoor):			
	Rated Cooling Tons (estimate):			

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 Existing furnace or air handler includes an ECM motor and install date and model and serial number of existing furnace is included with the equipment description.
 † Eligible for new construction homes.

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Variable Speed Heating Water Circulation Pump † • Must be a variable speed ECM/permanent magnet type pump • With integrated speed control (automatically adjusts flow output to changing demand) • For hydronic systems only	Manufacturer:		\$100	
	Model #:			
	Serial #:			
Heat Pump Water Heater † • Must replace existing electric water heater • Energy factor ≥ 2.0 required • Ground-source heat pump systems with desuperheater or other means for heating domestic hot water are eligible for this measure	Manufacturer:		\$200	
	Model #:			
	Serial #:			
Electric Water Heater † • Energy Factor (EF) ≥ 0.93 required	Manufacturer:		\$50	
	Model #:			
ENERGY STAR Pool Pump † • With automatic speed controls	Manufacturer:		\$250	
	Model #:			
Pipe Wrap Insulation • Min R3 • Must be installed on electric water heater outlet	Manufacturer:	(linear feet)	\$0.80/ft \$8 max	
	Model #:			
Total Incentive:				\$

* Must be installed by a contractor.
 ** SEER rating cannot include ECM blower motor, unless this application also includes a Furnace with ECM or ECM Blower Motor for rebate, OR existing furnace or air handler includes an ECM and documentation (in the form of an invoice) for the existing furnace or air handler with ECM is provided with this application. Must replace both the evaporator and condenser coil and must be a matched set. If installing a qualified AC between October 1 and April 30, and the condenser cannot be set, the invoice must include the condenser model and state that equipment will be installed in the spring. Existing furnace or air handler includes an ECM motor and install date and model and serial number of existing furnace is included with the equipment description.
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Terms and Conditions

APPLICATION: This application and any required additional documentation, including the invoice, must be filled out completely, truthfully and accurately. Members are advised to retain a copy of this application and any accompanying documentation submitted to HomeWorks Tri-County Electric Cooperative under this program. HomeWorks Tri-County Electric Cooperative and its contractors will not be responsible for lost documentation pertaining to this application request. Details of this program, including incentive levels, are subject to change or cancellation without prior notice. This application with required documentation must be received within 60 days of the installation's completion. Please visit michigan-energy.org for the most up-to-date details.

LIMITED FUNDS: Funds for incentives are limited and available on a first-come, first-served basis. Incentive amounts are valid through December 31, 2017. HomeWorks Tri-County Electric Cooperative reserves the right to not pay this incentive if funds are not available at the time of application approval, or if the form and all required additional information are not filled out completely and accurately. Incentive amount may not exceed purchase price.

ELIGIBILITY: This offer is valid for HomeWorks Tri-County Electric Cooperative residential members applying through the Energy Optimization residential incentive program only. Members applying for an incentive must receive electricity distribution service from HomeWorks Tri-County Electric Cooperative. This offer is not valid for commercial properties. Equipment must be installed in the HomeWorks Tri-County Electric Cooperative service territory. Eligible equipment can be found on pages 3-5 of this application. Limit one incentive per eligible measure/unit.

APPROVAL, VERIFICATION AND INSPECTION: Prior to any payment of incentives, HomeWorks Tri-County Electric Cooperative reserves the right to verify sales transactions. Members and/or their Contractor will verify that the installed energy saving measures meet all applicable building codes, zoning laws, local, state, and federal requirements, and other relevant requirements. Member is responsible for any applicable permits as required by aforementioned code/law. Outdoor temperatures may affect this verification process. Member's home may also be selected for a quality control post-installation inspection by the Electric Cooperative. No warranty is implied by this inspection.

PROOF OF PURCHASE: A receipt itemizing the purchased equipment must accompany each incentive application form. The receipt must indicate the equipment type, make, model, price, serial numbers and the date of purchase.

PAYMENT: Please allow up to 6-8 weeks for payment. Incentive payments are made by check. Payment processing may take longer if information is missing on the application. Please contact the Energy Optimization program if you have any questions about your incentive.

TAX LIABILITY: HomeWorks Tri-County Electric Cooperative will not be responsible for any tax liability that may be imposed on the member as a result of the payment of incentives. Please contact your tax advisor for more information.

NO ENDORSEMENT: HomeWorks Tri-County Electric Cooperative does not endorse any particular manufacturer, product, system design, claim, or contractor in promoting this program.

INFORMATION RELEASE: Member agrees that HomeWorks Tri-County Electric Cooperative may include their name, address, account number, services and resulting energy savings ("Information") in a database hosted by a contractor of HomeWorks Tri-County Electric Cooperative and such Information may be included in reports or other documentation submitted to HomeWorks Tri-County Electric Cooperative, and/or the Michigan Public Service

Commission ("Reports"). HomeWorks Tri-County Electric Cooperative will treat such Information as confidential and the Information in the Reports shall only be in the aggregate.

RELEASE/INDEMNIFICATION: Payment of incentives under the Program and/or evaluation of applications for incentives shall not deem HomeWorks Tri-County Electric Cooperative or any of its affiliates, employees or agents ("Electric Cooperative Parties") to be responsible for any work completed in connection herewith. Applicant fully releases the Electric Cooperative Parties from any and all claims it may have against the Electric Cooperative Parties in connection with this application, the incentives or the work performed in connection with them. In addition, applicant agrees to defend, indemnify and hold the Electric Cooperative Parties harmless from and against any and all claims, losses, demands or lawsuits by any third parties arising in connection with this application, the payment or non-payment of incentives, or any work performed in connection with them.

LIMITATION OF LIABILITY: HomeWorks Tri-County Electric Cooperative's total liability is limited to the amount of the incentive payment specified in this application. **IN NO EVENT WILL THE ELECTRIC COOPERATIVE BE LIABLE WHETHER IN CONTRACT, TORT (INCLUDING NEGLIGENCE), STRICT LIABILITY, WARRANTY OR OTHERWISE FOR SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES CONNECTED WITH OR RESULTING FROM PARTICIPATION IN THIS PROGRAM.**

DISCLAIMER: NEITHER HOMEWORKS TRI-COUNTY ELECTRIC COOPERATIVE NOR ANY OF ITS AFFILIATES GUARANTEES THE ENERGY SAVINGS OR MAKES ANY WARRANTIES ASSOCIATED WITH THE MEASURES ELIGIBLE FOR INCENTIVES UNDER THIS PROGRAM. HOMEWORKS TRI-COUNTY ELECTRIC COOPERATIVE HAS NO OBLIGATIONS REGARDING, AND DOES NOT ENDORSE OR GUARANTEE, ANY CLAIMS, PROMISES, WORK, OR EQUIPMENT MADE, PERFORMED, OR FURNISHED BY ANY CONTRACTOR OR EQUIPMENT VENDOR THAT SELLS OR INSTALLS ANY ENERGY EFFICIENCY MEASURES. HOMEWORKS TRI-COUNTY ELECTRIC COOPERATIVE MAKES NO WARRANTIES OR REPRESENTATIONS OF ANY KIND, WHETHER STATUTORY, EXPRESS, OR IMPLIED, INCLUDING WITHOUT LIMITATIONS, WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE REGARDING THE CENTRAL AIR CONDITIONING, OR FURNACE EQUIPMENT PROVIDED BY A MANUFACTURER OR VENDOR. CONTACT YOUR CONTRACTOR FOR DETAILS REGARDING EQUIPMENT PERFORMANCE AND WARRANTIES. HOMEWORKS TRI-COUNTY ELECTRIC COOPERATIVE HAS NO OBLIGATION TO MAKE ANY INCENTIVE DESCRIBED HEREIN UNLESS CERTAIN MINIMUM REQUIREMENTS OF THE PROGRAM HAVE BEEN MET AND FUNDS ALLOCATED FOR SUCH INCENTIVES ARE AVAILABLE FOR DISTRIBUTION.

PROPERTY RIGHTS: Member represents that they have the right to complete and/or install the energy-saving measures on the property on which those measures are completed and/or installed and that any necessary landlord's consent has been obtained.

MEMBER'S CERTIFICATION: Member certifies that they have purchased and installed the equipment listed on the other side of this application at the defined location. Member agrees that all information is true and that they have conformed to all program and equipment requirements listed.