

Instructions for Use

Step 1

Determine Eligibility

Verify that the utility company listed on the incentive application is your electric utility service provider. Incentives are offered to members with electric service in Michigan only. 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, 2020 and December 31, 2020.

Eligible measures and incentive levels are subject to change. Ensure that you are using the most up-to-date application form by visiting michigan-energy.org.

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. Equipment must be new (not used) to be eligible for incentives, except where noted.

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 the application.

Requirements for Incentive Processing:

- Equipment must be installed and operational before submitting this form.
- Include the following for a complete application:
 - Completed/signed copy of this form.
 - Copy of sales receipt/invoice indicating:
 - ✓ Equipment type
 - ✓ Price
 - ✓ Installation address
 - ✓ Manufacturer, model, and serial number
 - ✓ Date of purchase/installation
 - AHRI certificate/reference number (for furnace, air conditioning, and heat pump incentives). Refer to AHRIdirectory.org.
- NO STAPLES PLEASE.

Submit your completed application and required paperwork to:

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

Email: info@michigan-energy.org

Fax: 608.646.7682

Step 4

Payment

Once completed paperwork is submitted, incentive payments are usually mailed within six to eight weeks.

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



2020 Residential HVAC Incentive Application



This application is for qualified items installed between January 1, 2020 and December 31, 2020. Complete applications must be received within 60 days of installation.

SECTION 1: Member Information

| | | | | | |
|--|--|--|-------------|--|--|
| Member Name (as it appears on electric bill): | | Cell Phone: | Home Phone: | Email: | |
| Installation Address (where equipment is installed): | | City: | | State: MI | ZIP: |
| Mailing Address (if different than above): | | City: | | State: | ZIP: |
| Preferred method of follow-up communication: <input type="checkbox"/> Postal mail <input type="checkbox"/> Email <input type="checkbox"/> Home phone <input type="checkbox"/> Cell phone | | | | | |
| 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 or heat pump? <input type="checkbox"/> Yes <input type="checkbox"/> No | | Water heating fuel type: <input type="checkbox"/> Natural Gas <input type="checkbox"/> Electricity <input type="checkbox"/> Propane <input type="checkbox"/> Oil <input type="checkbox"/> Wood <input type="checkbox"/> Other _____ | | | |
| Primary fuel for home heating (check one): <input type="checkbox"/> Natural Gas <input type="checkbox"/> Electricity <input type="checkbox"/> Propane <input type="checkbox"/> Oil <input type="checkbox"/> Wood <input type="checkbox"/> Other _____ | | | | Check one: <input type="checkbox"/> Existing home <input type="checkbox"/> New construction | |

SECTION 2: Contractor Information (please submit separate forms if using multiple contractors)

| | | | | | |
|----------------------------------|--|----------------------|--|--------|------|
| Company Name: | | Contact Name: | | | |
| Company Address: | | City: | | State: | ZIP: |
| Phone: | | Email: | | | |
| HVACR License Number (required): | | HVACR Licensee Name: | | | |

SECTION 3: Incentive Payment Information

| | | | | | |
|--|--|--------------|--|--------------|------|
| Make Incentive Check Payable to (payee): <input type="checkbox"/> Member (skip to Section 4: Signature) <input type="checkbox"/> Landlord (complete below) <input type="checkbox"/> Contractor (complete below. See PAYMENT section in Terms and Conditions.) | | | | | |
| 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) | | Payee Phone: | | Payee Email: | |
| Alternate Pay Address (optional): | | City: | | State: | ZIP: |

SECTION 4: Signature

| | |
|--|-------|
| The Residential HVAC Incentive Application cannot be processed unless all of the appropriate fields on this application are complete. This application is valid for products installed between January 1, 2020 and December 31, 2020. I have read and understand the Terms and Conditions. I certify the information I have provided is true and correct, and the product(s) for which I am requesting an incentive meets the requirements in this application. I have elected to utilize electronic signatures. I understand and intend that a legal signature is formed by typing my name on this document. If any of the parties do not wish to sign this document electronically, all must opt out together and print a paper copy to sign manually. | |
| Member Signature: /S/ | Date: |

Submit your completed application to: MECA EO Programs, 431 Charmany Drive, Madison, WI 53719 Email: info@michigan-energy.org Fax: 608.646.7682

| Measures | Specifications | | Quantity Installed | Incentive per Unit | Total Incentive (Qty x Incentive) |
|---|---|-------|---------------------|--|-----------------------------------|
| Central Air-Source Heat Pump *† ■ Minimum AHRI Rated SEER 15.0 ** ■ Minimum AHRI Rated HSPF 8.5 Refer to AHRIdirectory.org for SEER and HSPF ratings | SEER: | HSPF: | | SEER 15.0-15.9 = \$250 SEER 16.0-16.9 = \$350 SEER 17.0-18.9 = \$500 SEER 19.0+ = \$750 | \$ |
| | Manufacturer: | | | | |
| | Model # (indoor): | | | | |
| | Serial # (indoor): | | | | |
| | Model # (outdoor): | | | | |
| | Serial # (outdoor): | | | | |
| | AHRI Ref #: | | | | |
| Type of heating system being replaced: <input type="checkbox"/> Electric Resistance/Electric Baseboard Heat <input type="checkbox"/> Air Source Heat Pump <input type="checkbox"/> Ground Source Heat Pump <input type="checkbox"/> Natural Gas <input type="checkbox"/> Propane <input type="checkbox"/> Oil <input type="checkbox"/> Wood <input type="checkbox"/> N/A - New Construction | | | | | |
| Mini/Multi-Split Ductless Air-Source Heat Pump *† ■ Minimum AHRI Rated SEER 18.0 ■ Minimum AHRI Rated HSPF 9.0 ■ Must provide both heating and cooling. Cooling-only units do not qualify. Refer to AHRIdirectory.org for SEER and HSPF ratings | SEER: | HSPF: | # of Outdoor Units: | \$700 for each Outdoor Unit | \$ |
| | Manufacturer: | | | | |
| | Model # (indoor): | | | | |
| | Serial # (indoor): | | # of Indoor Units: | \$50 for each Indoor Unit | |
| | Model # (outdoor): | | | | |
| | Serial # (outdoor): | | | | |
| | AHRI Ref #: | | | | |
| Type of heating system being replaced: <input type="checkbox"/> Electric Resistance/Electric Baseboard Heat <input type="checkbox"/> Air Source Heat Pump <input type="checkbox"/> Ground Source Heat Pump <input type="checkbox"/> Natural Gas <input type="checkbox"/> Propane <input type="checkbox"/> Oil <input type="checkbox"/> Wood <input type="checkbox"/> N/A - New Construction | | | | | |
| Ground-Source Heat Pump *† ■ Minimum AHRI Rated EER 17.0 Refer to AHRIdirectory.org for EER ratings | EER (full load): | | | EER 17.0-18.9 = \$500 EER 19.0+ = \$750 | \$ |
| | <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 | | | | |
| | Manufacturer: | | | | |
| | Model #: | | | | |
| | Serial #: | | | | |
| AHRI Ref #: | | | | | |
| Type of heating system being replaced: <input type="checkbox"/> Electric Resistance/Electric Baseboard Heat <input type="checkbox"/> Air Source Heat Pump <input type="checkbox"/> Ground Source Heat Pump <input type="checkbox"/> Natural Gas <input type="checkbox"/> Propane <input type="checkbox"/> Oil <input type="checkbox"/> Wood <input type="checkbox"/> N/A - New Construction | | | | | |
| Desuperheater for Ground-Source Heat Pump † ■ Must be a desuperheater for domestic hot water generation connected to a ground-source heat pump ■ Must be connected to electric back-up water heater | Model # (storage tank): | | | \$500 | \$ |
| | Model # (ground-source heat pump): | | | | |

| Measures | Specifications | Quantity Installed | Incentive per Unit | Total Incentive (Qty x Incentive) |
|--|--------------------------------|--------------------------|--|-----------------------------------|
| ECM Blower Motor (Check one): <input type="checkbox"/> New furnace with ECM blower * † <input type="checkbox"/> New ducted air handler or ground-source heat pump with ECM blower * † <input type="checkbox"/> New ECM blower motor in existing furnace or air handler * | Manufacturer: | | \$200 | \$ |
| | Model #: | | | |
| | Serial #: | | | |
| | AHRI Ref # (new furnace only): | | | |
| Central Air Conditioning System *† ■ Minimum AHRI Rated SEER 15.0 ** Refer to AHRIdirectory.org for SEER ratings | SEER: | | SEER 15.0-15.9 = \$150 SEER 16.0-16.9 = \$250 SEER 17.0-18.9 = \$350 SEER 19.0+ = \$500 | \$ |
| | Manufacturer: | | | |
| | Model # (indoor): | | | |
| | Serial # (indoor): | | | |
| | Model # (outdoor): | | | |
| | Serial # (outdoor): | | | |
| | AHRI Ref #: | | | |
| Wi-Fi-Enabled Thermostat † ■ Must feature Wi-Fi connectivity and maintain a 7 day, programmable schedule. ■ Must control central AC, heat pump, or electric heat. | Manufacturer: | Limit 1 per system | \$75 | \$ |
| | Model #: | | | |
| 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 bonus per system | \$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 thermostat at the same time. ■ All equipment must qualify individually to be eligible for the bonus. | | | \$150 Bonus | |

† Eligible for new construction homes.

* Must be installed by a mechanical contractor licensed by the state of Michigan.

** To be eligible, the indoor coil and outdoor unit must be a matched set according to the AHRI database. An AHRI Certificate of Product Ratings showing the efficiency of the installed unit must be submitted. An ECM motor on the indoor blower fan can serve to increase the SEER rating of the air conditioning or heat pump system. If the system has an ECM blower motor, the SEER rating may include the ECM blower; an invoice showing the model and serial number of an installed ECM furnace/air handler or retrofit ECM must be included with this application. The ECM furnace/air handler may be installed at the same time as the air conditioning/heat pump system or may have been installed previously.

| Measures | Specifications | Quantity Installed | Incentive per Unit | Total Incentive (Qty x Incentive) |
|---|--------------------------------|--------------------|-----------------------------|-----------------------------------|
| Efficient Circulation Pump † ■ Must be an ECM/permanent magnet-type pump. ■ For hydronic heating systems only. | Manufacturer: | | \$100 | \$ |
| | Model #: | | | |
| Heat Pump Water Heater † ■ Must replace existing electric water heater. ■ EF or UEF ≥ 2.0 required. | Manufacturer: | | \$700 | \$ |
| | Model #: | | | |
| | Serial #: | | | |
| ENERGY STAR® Pool Pump † ■ Must be multi-speed or variable speed pump with automatic speed controls. | Manufacturer: | | \$250 | \$ |
| | Model #: | | | |
| Pipe Wrap Insulation ■ Minimum R3. ■ Must be installed on electric water heater outlet. | Manufacturer: | (linear feet) | \$0.80/ft \$8 max | \$ |
| | Model #: | | | |
| 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): | | | |
| Total Incentive: | | | | \$ |

† Eligible for new construction homes.

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. 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, 2020. 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 is not filled out completely and accurately, including all required additional information, and submitted within the required time allowed. 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 in Michigan only. Eligible equipment can be found on Pages 3–5 of this application. Equipment must be new (not used) to be eligible for incentives, except where noted. 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. The member is responsible for any applicable permits as required by aforementioned code/law. Outdoor temperatures may affect this verification process. The member's home may also be selected for a quality control post-installation inspection by HomeWorks Tri-County 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: Once completed paperwork is submitted, incentive payments are usually mailed within six to eight weeks. Incentive payments are made by check. Payment processing may take longer if information is missing on the application. The member may authorize payment of the incentive directly to the contractor. In this scenario, the credit **MUST** be clearly labeled as the Energy Optimization program incentive and be deducted from the amount due on the invoice.

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: The 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 Energy Optimization 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. The 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, the 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 HOMEWORKS TRI-COUNTY 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: The 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: The member certifies that they have purchased and installed the equipment listed in this application at the defined location. The member agrees that all information is true, and that they have conformed to all program and equipment requirements listed.