

Instructions for Use

Step 1

Determine Eligibility

Verify 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, 2018 and December 31, 2018.

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 Rebate Processing:

- Equipment must be installed and operational before submitting this form.
- 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 air conditioning and heat pump incentives).
- NO STAPLES PLEASE.

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.**

2018 Residential HVAC Incentive Application

This application is for qualified items installed between January 1, 2018 and December 31, 2018. Complete applications must be received within 60 days of installation.

SECTION 1: Member Information

Member Name (as it appears on electric bill):		Phone:		Email:	
Installation Address (where equipment is installed):		City:		State: MI	ZIP:
Mailing Address (if different than above):		City:		State:	ZIP:
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 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 _____				
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 _____			Check one: <input type="checkbox"/> Existing home <input type="checkbox"/> New construction		

SECTION 2: Contractor Information

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

SECTION 3: Incentive Payment Information (please submit separate forms if using multiple contractors.)

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)					
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:

SECTION 4: Signature

The Energy Optimization 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 between January 1, 2018 and December 31, 2018. I have read and understand the terms and conditions. I certify 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:

2018 Residential HVAC Incentive Application

Measures	Specifications	Quantity Installed	Incentive per Unit	Total Incentive (Qty x Incentive)
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. **	SEER:	HSPF:	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 #:			
Mini/Multi-Split Ductless Air-Source Heat Pump *† ■ Minimum SEER 21 for systems used predominantly for cooling. ■ Minimum HSPF 10 for systems used predominantly for heating.	SEER:	HSPF:	\$750	\$
	Manufacturer:			
	Model # (indoor):			
	Serial # (indoor):			
	Model # (outdoor):			
	Serial # (outdoor):			
	AHRI Ref #:			

† 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. The SEER rating may not include the ECM blower motor unless the system has one. To show the system has an ECM blower motor, 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.

2018 Residential HVAC Incentive Application

Measures	Specifications	Quantity Installed	Incentive per Unit	Total Incentive (Qty x Incentive)
Wi-Fi-Enabled or Smart Occupancy-Sensing Thermostat † <ul style="list-style-type: none"> 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 per system	\$75	\$
	Model #:			
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 <input type="checkbox"/> N/A - New Construction			
	Manufacturer:			
	Model #:			
	Serial #:			
AHRI Ref #:				
HVAC Combo Bonus † <ul style="list-style-type: none"> 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 † <ul style="list-style-type: none"> 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. 	
* Must be installed by a mechanical contractor licensed by the state of Michigan. † Eligible for new construction homes.				

2018 Residential HVAC Incentive Application

Measures	Specifications	Quantity Installed	Incentive per Unit	Total Incentive (Qty x Incentive)
Efficient Circulation Pump † <ul style="list-style-type: none"> Must be an ECM/permanent magnet-type pump. For hydronic heating systems only. 	Manufacturer:		\$100	\$
	Model #:			
Heat Pump Water Heater † <ul style="list-style-type: none"> 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. Backup water heater must be electric. 	Manufacturer:		\$300	\$
	Model #:			
	Serial #:			
ENERGY STAR® Pool Pump † <ul style="list-style-type: none"> With automatic speed controls. 	Manufacturer:		\$250	\$
	Model #:			
Pipe Wrap Insulation <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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):			
† Eligible for new construction homes.			Total Incentive:	\$

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, 2018. 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 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. 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 six to eight 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.