

Heating and Cooling Incentive Application for Residential Customers

A Cash Incentive Energy Efficiency Program brought to you by:



Instructions for Use:

For complete instructions, please refer to the Terms and Conditions on page 8.

Step 1: Determine Eligibility. Equipment must be new and installed in a residence billed under an electric residential rate by a participating utility. Only new products which are exact product types listed in this application form are eligible for the prescriptive incentives described in this application. If the potential incentive is greater than \$3,000, pre-approval from the participating utility is required. Contact the utility to get pre-approval.

Step 2: Install Equipment. New equipment must be installed and old equipment properly removed and disposed of. Old equipment must not be installed elsewhere.

Step 3: Complete and sign the application. Complete the application and attach copies of all project invoices, including labor costs. Attach supporting documents including AHRI Certificate of Product Ratings as specified in the application form.

Step 4: Submit completed application. A completed application and all supporting documents must be received within 30 days of installation. Incomplete applications will cause delays in payment or denial of the application. Mail, fax, or e-mail the application and all supporting documentation to:

Worthington Public Utilities
 PO Box 458
 Worthington, MN 56187
 Phone: (507) 372-8680
 Fax: (507) 372-8688



Please note: Worthington Public Utilities and its supplemental power supplier, Missouri River Energy Services, are offering this Bright Energy Solutions Program. Worthington Public Utilities and Missouri River Energy Services together will be

Please visit www.brightenergysolutions.com for more information about the Bright Energy Solutions® Programs.

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Customer Information (Please Print)				
Name of Homeowner	Phone	Installation Date		
Mailing Address	City	State	ZIP Code	
Installation Address	City	State	ZIP Code	
Email Address (By providing your email address, you are granting The Utility permission to send emails regarding this project or updates on our incentive programs.)				
Municipality Utility Name & Account Number	Building Type <input type="checkbox"/> Existing <input type="checkbox"/> New Construction		Building Use <input type="checkbox"/> Single Family <input type="checkbox"/> Multi-family __ Units	
How did you learn about the program? <input type="checkbox"/> My Utility <input type="checkbox"/> Contractor/Supplier <input type="checkbox"/> Community Event <input type="checkbox"/> Mailing <input type="checkbox"/> Bill Insert <input type="checkbox"/> Other: _____				

Retailer / Contractor Information				
Name of Installing Contractor	Mailing Address	City	State	Zip
Phone	Email Address (By providing your email address, you are granting The Utility permission to send emails regarding this project or updates on our incentive programs.)			

Payment Information				
Please process payment to: <input type="checkbox"/> Customer (listed above) <input type="checkbox"/> Vendor/Contractor (listed above) <input type="checkbox"/> Alternative Recipient				
If payment is to be made to an Alternative Recipient, please complete the remainder of this section:				
Company Name	Contact Name	Phone		
Address	City	State	ZIP	

Equipment Information					
A. Central Air Conditioning Units					
The Utility reserves the right to load manage (cycle on or off) customer equipment that qualifies for incentives under this program.					
Equipment Type	Minimum Specifications	AHRI Reference Number	Incentive	Quantity	Total
Central Air Conditioner ≤ 5 Tons Split System	ENERGY STAR® Efficiency Criteria - 14.5 SEER Rating		\$100/Unit		\$
Mini Split/Ductless Air Conditioner	16.0 SEER		\$100/Unit		\$
Subtotal Section A:					\$
Required New Equipment Information (can be provided by contractor)					
Outdoor Unit Manufacturer		Installed Model Number	Installed Serial Number		
Indoor Unit (Evaporator Coil) Manufacturer		Installed Model Number	Installed Serial Number		
<p>PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:</p> <ol style="list-style-type: none"> 1) AHRI Certificate of Product Ratings for the equipment installed. (This document can be provided by your contractor.) 2) Invoice clearly showing proof of purchase including model numbers, date of installation, installation address, and total project cost. <p>Installation of both the evaporator and condenser coil is required. All efficiency ratings must be stated at standard AHRI full load testing conditions. Efficiency ratings will be verified using the AHRI database (www.ahridirectory.org). All equipment installed must be new and all equipment removed must be properly disposed of – not reused or sold. Mini Split Ductless Air Conditioners do not qualify for additional ECM incentives.</p>					
B. ECM (Electronically Commutated Motors) in New Furnace/Air Handler/Fan Coil					
The Utility reserves the right to load manage (cycle on or off) customer equipment that qualifies for incentives under this program.					
Equipment Type	Specifications	AHRI/GAMA Reference Number	Incentive/Unit	Quantity	Total
Furnace with ECM	Furnace with an Electronically Commutated Motor (ECM)		\$150/unit		\$
Air Handler / Fan Coil with ECM	Air Handler / Fan Coil with an Electronically Commutated Motor (ECM)	None Available – Attach Spec Sheet Clearly Showing ECM	\$150/unit		\$
Subtotal Section B:					\$
Required New Equipment Information (can be provided by contractor)					
Furnace / Air Handler / Fan Coil Manufacturer:		Model(s) Installed:	Serial Number(s) Installed:		
<p>PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:</p> <ol style="list-style-type: none"> 1) Proof of ECM <ol style="list-style-type: none"> a. <u>For Furnace with ECM</u> - AHRI / GAMA Certificate of Product Ratings for the furnace installed. (This document can be provided by your contractor.) If the Certificate of Product Ratings does not clearly indicate the presence of an ECM, please include additional documentation that states the presence of a factory installed ECM. b. <u>For Air Handler / Fan Coil</u> –Spec sheet or other manufacturer provided document which clearly states the use of a factory installed ECM motor in the model of air handler / fan coil used. 2) Invoice clearly showing proof of purchase including model numbers, date of installation, installation address, total project cost and stating ECM where applicable. 					
<p>Retrofit ECM's installed in existing equipment do not qualify. Geothermal heat pump system ECM's and Mini Split ECM's do not qualify. All equipment installed must be new and all equipment removed must be properly disposed of – not reused or sold.</p>					

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C. Air Source Heat Pumps The Utility reserves the right to load manage (cycle on or off) customer equipment that qualifies for incentives under this program.					
Equipment Type	Minimum Specifications*	AHRI Reference Number	Incentive/Unit	Quantity	Total
Air Source Heat Pump**	ENERGY STAR Efficiency Criteria 14.5 SEER, 8.2 HSPF		\$250		\$
Air Source Heat Pump**	18.0 SEER, 9.5 HSPF		\$350		\$
Mini Split/Ductless Air Source Heat Pump	16.0 SEER		\$200		\$
Subtotal Section C:					\$
Required New Equipment Information (can be provided by contractor)					
Outdoor Unit Air Source Heat Pump Manufacturer:		Model(s) Installed:	Serial Number(s) Installed:		
Indoor Unit Air Source Heat Pump Manufacturer:		Model(s) Installed:	Serial Number(s) Installed:		
<p>PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:</p> <ol style="list-style-type: none"> 1) AHRI Certificate of Product Ratings for the equipment installed. (This document can be provided by your contractor.) 2) Invoice clearly showing proof of purchase including model numbers, date of installation, installation address, and total project cost. 					
<p>All equipment installed must be new and all equipment removed must be properly disposed of – not reused or sold. All efficiency ratings must be stated at standard AHRI full load conditions. Efficiency ratings will be verified using the AHRI database (www.ahridirectory.org). Mini Split Ductless Air Source Heat Pumps are not eligible for additional ECM incentives.</p> <p>* All test results must be rated at full load AHRI standard testing conditions.</p> <p>** Air Source Heat Pumps--Qualifying units are standard split system, furnace or air handler / fan coil integrated for homes with ductwork. Electricity must be the primary heating source in the customer's new or existing home. Replacement of both the evaporator and condenser coil is required.</p>					

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D. Geothermal Heat Pumps The Utility reserves the right to load manage (cycle on or off) customer equipment that qualifies for incentives under this program.									
A	B	C	D	E	F	G	H	I	J
Installed Equipment	Size (Tons)* Based on Cooling Capacity	Qty	Total Tons	Incentive Per Ton	Minimum Efficiency**	Rated Full Load EER***	Rated Full Load COP***	AHRI Reference Number	Total Incentive (D x E)
Closed Loop Water to Air Ground Source Heat Pump < 11.3 Tons				\$200/ton	ENERGY STAR (Tier 2) 16.1 EER 3.5 COP				\$
Open Loop Water to Air Ground Source Heat Pump < 11.3 Tons				\$200/ton	ENERGY STAR (Tier 2) 18.2 EER 3.8 COP				\$
Closed Loop Water to Water Ground Source Heat Pump < 11.3 Tons				\$200/ton	ENERGY STAR (Tier 2) 15.1 EER 3.0 COP				\$
Open Loop Water to Water Ground Source Heat Pump < 11.3 Tons				\$200/ton	ENERGY STAR (Tier 2) 19.1 EER 3.4 COP				\$
Direct Geoexchange (DGX) < 11.3 Tons				\$200/ton	ENERGY STAR (Tier 2) 16.0 EER 3.6 COP				\$
Desuperheater Bonus (Presence of Desuperheater Must be Clearly Stated on Invoice) \$250 A desuperheater is used to heat domestic hot water for the residence.							Desuperheater Qty: _____ x		\$
Subtotal Section D:								\$	
Required New Equipment Information (can be provided by contractor)									
Geothermal Heat Pump Manufacturer:									
Installed Model Numbers:					Installed Serial Numbers:				
PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS: <ol style="list-style-type: none"> 1) AHRI Certificate of Product Ratings for the equipment installed. If available, this document can be provided by your contractor. If the certificate is not available, please include a manufacturer's spec sheet that clearly shows efficiency ratings at ISO Standard 13256 (AHRI 870 for DGX systems) full load testing conditions along with part load testing conditions where applicable. 2) Invoice showing proof of purchase including model numbers, date of installation, address of installation, total project cost, and stating that a desuperheater is present if applicable. 									
The newly installed geothermal heat pump must be the primary heating and cooling source for the home. All equipment installed must be new and all equipment removed must be properly disposed of – not reused or sold. Incentive is limited to units with full load cooling size of 11.3 tons or less. Desuperheater incentive only applies to new installations of qualifying geothermal heat pumps. Additional incentives for ECM's in geothermal systems are not available.									
<small>* Size is based on full load cooling capacity at ANSI/AHRI/ASHRAE ISO Standard 13256 testing conditions. For DGX systems AHRI 870 testing conditions shall be used. ** All efficiency ratings must be stated at standard ANSI/AHRI/ASHRAE ISO Standard 13256 (or AHRI 870 for DGX systems) testing conditions. Units not listed at www.energystar.gov as ENERGY STAR qualified must meet equivalent minimum efficiency standards to be eligible. Efficiency ratings will be verified using the AHRI database (www.ahridirectory.org). For multistage units the incentive minimum efficiency is based on ENERGY STAR's blended EER rating which is defined as follows: EER = (highest rated capacity EER + lowest rated capacity EER) / 2 and COP = (highest rated capacity COP + lowest rated capacity COP) / 2. ***Rated full load EER and COP based on ANSI/AHRI/ASHRAE ISO Standard 13256 (AHRI 870 for DGX systems) testing conditions.</small>									

E. Programmable Thermostats					
The Utility reserves the right to load manage (cycle on or off) customer equipment that qualifies for incentives under this program.					
Equipment Type	Minimum Specifications	Equipment Controlled	Incentive Per Thermostat	Quantity	Total Incentive
Programmable Thermostat Controlling Central Air Conditioning	See Below* Not to Exceed 3 Per Household Annually	<input type="checkbox"/> Natural Gas, Oil, or Propane Furnace or Boiler With Central Air Conditioning <input type="checkbox"/> Electric Furnace With Central Air Conditioning <input type="checkbox"/> Heat Pump Heating and Cooling <input type="checkbox"/> Geothermal Heating and Cooling <input type="checkbox"/> Central Air Conditioning Only	\$25		\$
Subtotal Section E:					\$
Required New Equipment Information (can be provided by contractor)					
Thermostat #1 Manufacturer:		Model Number:			
Thermostat #2 Manufacturer:		Model Number:			
Thermostat #3 Manufacturer:		Model Number:			
<p>PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:</p> <ol style="list-style-type: none"> 1) Specification sheet or other documentation if available which shows that the thermostat is programmable. 2) Invoice clearly showing proof of purchase including model numbers and total cost including labor if installed by a contractor. 					
<p>*Qualified thermostats must be shipped with a default energy saving program that is capable of maintaining two separate programming periods (to address the different comfort needs of weekdays and weekends) and at least four possible temperature settings (i.e., wake, day, evening, and sleep settings). Thermostat must be used to control a primary source of central air conditioning for the home.</p> <p><u>Heat Pump and Geothermal Systems.</u> Standard programmable thermostats are generally not recommended for heat pumps or geothermal systems. In the cooling mode, turning up the thermostat will save energy and money. But when in the heating mode, setting back the thermostat can cause these systems to operate inefficiently. Some companies offer specially designed thermostats for heat pumps and geothermal systems which make setting back the thermostat cost effective in the summer and winter. Please look for a specially designed programmable thermostat when purchasing for use with a heat pump or geothermal system. If a specially designed programmable thermostat is not used, maintaining a moderate setting in the winter is generally the most cost effective practice. Please contact your dealer for information on the most efficient operation of your specific system.</p>					

F. Heat Pump Water Heaters (ENERGY STAR Qualified Self-Contained Units Only)						
The Utility reserves the right to load manage (cycle on or off) customer equipment that qualifies for incentives under this program.						
Make/Model #	Serial #	Tank Size	Minimum Efficiency	Rated EF Efficiency	Incentive Per Unit	Total Incentive*
		GAL.	ENERGY STAR Efficiency Criteria Energy Factor (EF) ≥ 2.0		\$300	\$
		GAL.	ENERGY STAR Efficiency Criteria Energy Factor (EF) ≥ 2.0		\$300	\$
Subtotal Section F:						\$
<p>PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:</p> <ol style="list-style-type: none"> 1) Manufacturer's specification sheet showing model number and energy factor (EF). 2) Invoice clearly showing proof of purchase including quantities, model numbers, date of installation, installation address, and total project cost. 						
<p>The utility reserves the right to load manage (cycle on or off) customer equipment that qualifies for incentives under this program. All equipment installed must be new and all equipment removed must be properly disposed of – not reused or sold.</p> <p>* Maximum incentive cannot exceed 75% of the total equipment cost.</p>						

Summary of Incentives	
Subtotal Section A: Central Air Conditioning Units	\$
Subtotal Section B: ECM Motors	\$
Subtotal Section C: Air Source Heat Pumps	\$
Subtotal Section D: Geothermal Heat Pumps	\$
Subtotal Section E: Programmable Thermostats	\$
Subtotal Section F: Heat Pump Water Heaters	\$
Total Incentive:	\$

Certifications and Signature		
<p>I hereby certify that: 1. The information contained in this application is accurate and complete; 2. All installation is complete and the unit(s) is operational prior to submitting application; 3. All rules of this incentive program have been followed; and 4. I have read and understand the terms and conditions applicable to this incentive program as set forth in this application, including those set forth on page 8 below.</p> <p>I agree to verification of equipment installation which may include a site inspection by a program or utility representative. I understand that I am not allowed to receive more than one incentive from this program on any piece of equipment. I agree to indemnify, defend, hold harmless and release The Utility from any claims, damages, liabilities, costs and expenses (including reasonable attorneys' fees) arising from or relating to the removal, disposal, installation or operation of any equipment or related materials in connection with the programs described in this application, including any incidental, special or consequential damages.</p> <p>Please sign and complete all information below.</p>		
Homeowner Signature	Print Name	Date

Member Utility Use Only				
Date Received	Pre-Inspected? <input type="checkbox"/> Yes <input type="checkbox"/> No	Date Pre-Inspected: Initials:	Post-Inspected? <input type="checkbox"/> Yes <input type="checkbox"/> No	Date Post-Inspected Initials:
Incentive Approved <input type="checkbox"/> Yes <input type="checkbox"/> No	Amount: \$		Date Approved:	
Utility or Program Representative				

ELIGIBILITY:

- These incentives are offered by Missouri River Energy Services and its participating members. For questions regarding eligibility, call your local utility listed on the cover page of this application.
- Residential customers who purchase electricity from The Utility are eligible to participate in the Bright Energy Solutions® Residential HVAC Incentive Program. Eligible equipment must be connected to an electric service billed under a residential rate class by The Utility.
- This program is applicable only to equipment that meets the detailed equipment specifications and requirements described in this application. The Utility will determine, in its discretion, whether such specifications and requirements are satisfied.
- Customers may not receive more than one incentive for each piece of equipment installed under this program or any combination of Bright Energy Solutions programs.

TERMS AND CONDITIONS:

1. **Incentive Offer:** Projects, including all required installation, must be completed by December 31, 2012. A signed application and itemized invoices for materials and labor must be submitted to the participating utility at the address located on the cover page of this application **within 30 calendar days of project completion**. Please keep a copy for your records.
2. **Proof of Purchase:** This application must have complete information and be submitted with an invoice(s) itemizing the new equipment purchased and labor costs. The invoice(s) must indicate date of purchase, size, type, make, model and total project cost. AHRI Certificates of Product Ratings must also be included. In cases where the AHRI Certificate of Product Ratings is not available or applicable the manufacturer (OEM) specification sheets must also be included.
3. **Compliance:**
 - a) All projects must comply with federal, state, and local codes.
 - b) All equipment must be new or retrofitted with new components per the program specifications. Used or rebuilt equipment is not eligible for incentives. Existing equipment must be removed and properly disposed of.
 - c) Equipment must meet specification requirements and be purchased, installed and operating prior to submitting an incentive application.
 - d) Customers may only receive one incentive per piece of qualifying equipment.
 - e) All projects must be a retrofit / replacement installation in an existing residence or installation in new construction.
 - f) All projects for which more than \$3,000 in incentive payments is sought must be approved by The Utility prior to the commencement of the project. Receipt of pre-approval does not guarantee incentive payments will be made. Incentive payments will be made only upon the customer's satisfaction of all terms and conditions of this program.
 - g) All terms and conditions of this application must be satisfied by the customer.
4. **Payment:** Once completed paperwork is submitted, incentive payments are usually made within 4 – 8 weeks. Incomplete applications will either delay payments or be denied. The Utility reserves the right to refuse payment and participation if the customer or the customer's contractor violates program rules and procedures.
5. **Inspection:** The Utility may conduct an inspection of the customer's facility to survey any installed projects. All projects exceeding \$3,000 of incentives will be inspected prior to incentive payment. The Utility may inspect customer records relating to incentives sought by the customer.
6. **Information Sharing:** The Utility reserves the right to publicize your participation in this program, unless you specifically request otherwise in writing. Information contained in this application may be shared with state boards, commissions, departments, and other Bright Energy Solutions participating utilities.
7. **Program Discretion:** Incentives are available on a first-come, first-served basis. This program and its incentive amounts are subject to change or termination without notice at the discretion of The Utility. Neither pre-approval of a project, nor any other action by The Utility, will entitle a customer to an incentive payment until the application is finally approved by The Utility. The Utility reserves the right to load manage (cycle on or off) customer equipment that qualifies for incentives under this program.
8. **Logo Use:** Customers or trade allies may not use the name or logo of Bright Energy Solutions, The Utility, or any other participating utility in any marketing, advertising, or promotional material without written permission.
9. **Disclaimers:** The Utility
 - a) does not endorse any particular manufacturer, product, labor or system design by offering these programs;
 - b) will not be responsible for any tax liability imposed on the customer as a result of the payment of incentives;
 - c) does not expressly or implicitly warrant the installation or performance of installed equipment or any contractor's quality of work (contact the equipment manufacturer or contractor for warranties);
 - d) is not responsible for the proper disposal/recycling of any waste generated as a result of this project;
 - e) is not liable for any damage, injury, or loss of life arising from or relating to the removal, installation, or operation of any equipment, or any other action taken by the customer or The Utility, in connection with a project undertaken by the customer under the programs described in this application;
 - f) does not guarantee that a specific level of energy or cost savings will result from the implementation of energy efficiency measures or the use of products funded under this program.

INCENTIVE LIMIT:

- Eligible customers may purchase and install qualifying equipment and receive an energy efficiency incentive of up to \$10,000 per customer, per calendar year. Payments for larger incentives may be allowed at the discretion of The Utility.
- An incentive exceeding \$3,000 must receive written approval from The Utility BEFORE project commencement.
- Total incentive will not exceed 75 percent of the project cost, including installation. If self-installed, incentives for items of equipment can be up to the purchase price of a specific item, but shall not exceed the Bright Energy Solutions incentives set by Missouri River Energy Services.
- Incentives for particular items of equipment and/or systems are limited as set forth in this application.