



Heat Pump Incentives

California Residents For work completed on or after July 27, 2015

Heat Pump Incentives			
Your trade ally or store associate can help you find eligible products and services			
Incentives	Heat Pump to Heat Pump Upgrade	Heat Pump Conversion	Ductless Heat Pump
Customer Incentive	\$100	\$1,000	Single-head: \$1,000 Multi-head: \$1,500
Trade Ally Incentive	Tier 1: \$50 Tier 2: \$150	Tier 1: \$50 Tier 2: \$550	Single-head: \$300 Multi-head: \$300

Instructions	HP Upgrade	HP Conversion	Ductless HP
Steps and requirements to earn each incentive			
1. Ensure the home qualifies			
• Must be existing home, not new construction	✓	✓	✓
• Previous primary heat source must have been a ducted heat pump that served at least 80% of the home's conditioned living space	✓		
• Previous primary heat source must have been a permanently installed electric resistance heating system (e.g. electric baseboard, electric furnace, electric ceiling/wall heat) serving at least 80% of the home's conditioned area			✓
• Previous primary heat source must have been a permanently installed electric furnace serving at least 80% of the home's conditioned area		✓	
• Gas, oil, wood heating, pellet stoves, and propane system conversions do not qualify	✓	✓	✓
• Incentive is not offered to customers replacing an existing ducted heat pump		✓	✓
• Homes 3,500 square feet or less may qualify for one unit, while homes greater than 3,500 square feet may qualify for two units. Homes greater than 3,500 square feet requiring more than two units may apply for additional incentives (additional documentation required, subject to program approval).	✓	✓	✓
2. Purchase a new qualifying product or service			
• Equipment must be installed according to the specifications outlined in the California HVAC Trade Ally Manual: pacificpower.net/ca-hvac-manual	✓	✓	✓
• Equipment must be listed on the AHRI Certified Directory: ahridirectory.org			
• Tier 1: Minimum 9.0 HSPF, 15 SEER			
• Tier 2: Minimum 9.5 HSPF, 16 SEER			
• New heat pump must be the current primary heat source and must service at least 80% of the home's conditioned living space	✓	✓	
• Equipment must be a new, air-source split or packaged unitary heat pump with an AHRI Standard Rating Cooling Capacity of 65,000 BTU/hr (5.4 tons) or less			

Instructions continued Steps and requirements to earn each incentive	HP Upgrade	HP Conversion	Ductless HP
<ul style="list-style-type: none"> Minimum 9 HSPF, 16 SEER Equipment must be a new AHRI rated ductless (mini-split) system Must employ an inverter driven outdoor compressor unit and a variable speed fan for indoor blower and be fully ductless 			✓
3. Hire a program-eligible trade ally for all services and tests			
<ul style="list-style-type: none"> The trade ally must be on the HVAC Trade Ally List available at pacificpower.net/ca-tradeallies 	✓	✓	✓
4. Complete and sign this application			
<ul style="list-style-type: none"> Homeowner completes section 1 Trade ally completes section 2 	✓	✓	✓
5. Include an itemized receipt or invoice Itemized details must clearly show and describe:			
<ul style="list-style-type: none"> Product or service description and costs Model numbers: indoor and outdoor AHRI certificate Date of purchase Date work initiated Date work completed 	✓	✓	✓
6. Mail all documents so they are postmarked within 90 days of completion of the qualifying product purchase or service completion Make copies for your records. Documents to mail include:			
<ul style="list-style-type: none"> This completed and signed application Itemized receipt or invoice W-9 tax form for businesses and non-individual customers applying for incentives Third Party Payment Addendum for homeowners who are not listed on the utility account and who are applying for incentives 	✓	✓	✓

SECTION 1 - Homeowner completes and submits with section 2

Incentive Selection

I am applying for this incentive: Heat pump upgrade Heat pump conversion Ductless heat pump

Homeowner and Property Information

Utility account number									-				
Name on utility account													
Address where product was installed								City		State		Zip Code	
Address where incentive check should be mailed								City		State		Zip Code	
Daytime phone for questions about your application								Email address for questions about your application					
Square footage of home								Year home built					
Home type: <input type="checkbox"/> Single family home <input type="checkbox"/> Manufactured home													
Home's previous primary cooling source (select one)													
<input type="checkbox"/> Central air conditioner				<input type="checkbox"/> Evaporative cooler				<input type="checkbox"/> Electric heat pump				<input type="checkbox"/> None	
Home's primary cooling source (select one)													
<input type="checkbox"/> Central air conditioner				<input type="checkbox"/> Evaporative cooler				<input type="checkbox"/> Electric heat pump				<input type="checkbox"/> None	

Homeowner and Property Information Continued

Home's **previous** primary heating source (select one)

- Electric baseboard
 Electric ceiling or wall heat
 Electric furnace
 Natural gas furnace
 Ductless heat pump
 Electric ducted heat pump
 Other

Did home's **previous** primary heating source serve at least 80% of the home's conditioned living space? Yes No

Does home's **new** heat pump serve at least 80% of the home's conditioned living space? Yes No


(Optional) I decline to receive additional energy-efficient product incentive information

How did you hear about cash incentives for energy-efficient products and services for your home? (select all that apply)

- Friend/family
 Utility website
 Print ad
 TV/radio ad
 Contractor/store staff
 Other

Homeowner's Acceptance of Terms

I hereby certify that all information is accurate including claims of customer and equipment information. I confirm that the improvements I installed were not required by code. I understand that information related to the completeness of my application may be shared with contractors. I also understand that the status of my application may be shared with third parties on an aggregated basis. I have read all terms and conditions and acknowledge that Pacific Power may verify all the information provided. Incentive checks are paid to the Pacific Power account holder. Customers are responsible for payment to contractors.

	Customer signature	Date
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SECTION 2 - Trade Ally completes and submits with section 1

Trade Ally Information	HP Upgrade	HP Conversion	Ductless HP
Trade ally completes for all incentives			
Trade ally business name			
Mailing address	City	State	Zip Code
Technician's name	Daytime phone number		
<input type="checkbox"/> I have submitted my business's W-9 tax form			

Product Information	HP Upgrade	HP Conversion	Ductless HP
Date of purchase	Date work initiated	Date work completed	
Condenser unit brand	Model number	Serial number	TXV installed? <input type="checkbox"/> Yes <input type="checkbox"/> No

Ductless Heat Pump Installation	HP Upgrade	HP Conversion	Ductless HP
Did you install the ductless heat pump in accordance with manufacturer and program specifications, including adherence to proper refrigerant charging and installation of exterior insulated refrigerant lines? <input type="checkbox"/> Yes <input type="checkbox"/> No			
How many heads/indoor units does the installed ductless heat pump have? <input type="checkbox"/> One <input type="checkbox"/> More than one			

Trade Ally's Acceptance of Terms

I hereby certify that all information is accurate including claims of customer and equipment information. I have read all terms on this application and acknowledge that Pacific Power may verify all the information provided. Customer personal information and account number will not be shared with contractors or their representatives. The status of customer incentive applications that are missing required information or were not qualified may be shared only with the contractor or their representatives associated with each individual incentive application.



Trade ally signature

Date

Resources

List of qualifying products and services: pacificpower.net/ca-qpl

Get your Pacific Power account number: pacificpower.net or 1-888-221-7070

List of program trade allies: pacificpower.net/ca-tradeallies

California HVAC trade ally manual: pacificpower.net/ca-hvac-manual

IRS W-9 forms (for businesses and non-individual customers receiving incentives): irs.gov/pub/irs-pdf/fw9.pdf

Third Party Payment Addendum (for homeowners and other third party entities not listed on account only): pacificpower.net/ca-addendum

If you installed several products you may be eligible for bonus incentives. Visit pacificpower.net/ca-upgrade for more info.

Incentive status: Please allow six weeks plus mail service time for delivery. Track your incentive status at pacificpower.net/ca-track-incentive. You can also reach us at hes@pacificpower.net or 1-800-942-0266, M-F, 7 a.m. to 5 p.m. (PST).

Mail complete applications, receipts, and other required documentation to:

Home Energy Savings
CA HVAC
818 S.W. Third Avenue #215
Portland, OR 97204-2405

Terms & Conditions

Pacific Power offers incentives through a variety of programs that focus on energy efficient products. When you (the "Customer") participate in these programs, you can save energy and money while reducing your impact on the environment. This application ("Incentive Application") is intended to guide you through the steps necessary to receive an Incentive ("Incentive") under the Home Energy Savings program ("Program"). The program is administrated by CLEAResult Consulting, Inc., a Texas corporation and/or an affiliate thereof ("CLEAResult"). The program may require engaging a qualified trade ally ("Trade Ally") in order to qualify for Incentives. Customer is responsible for paying for all trade ally services.

Incentive availability: Incentives are available on a first-come, first-served basis according to the postmark date on the application. Please reference the program website at pacificpower.net/hes to determine the current status of incentive availability. All services must be purchased and installed prior to submitting an Incentive Application. Applications must include all information requested. Failure to provide this information may result in delays. If required information is not provided within 42 days of application submittal, the Incentive Application will be denied. Incentive will not exceed purchase price. Additional terms and conditions may apply. Incentives are subject to tariff approval and may change with 45 days of notice. Please visit pacificpower.net/hes for current program requirements.

Qualifying customers: Residential electric customers residing in the state of California who purchase their electricity from Pacific Power on rate schedules D, DL-6, DS-8, DM-9 or NEM-35 qualify. Landlords who own rental properties served by the company in the state of California where the tenant is billed on rate schedules D, DL-6, DS-8, DM-9 or NEM-35 also qualify for this program. You can find your rate schedule on your bill, by calling toll free 1-888-221-7070 or by logging in at pacificpower.net. Incentive checks will be issued in the name of the customer on the qualifying account. If you are a property owner, landlord, property management company or homeowner association and not listed on the account where qualified equipment was installed or services performed you must submit a completed Third Party Payment Addendum to receive incentive check(s) made payable to you.

Customer responsibilities: Customer agrees to indemnify and release CLEAResult, Pacific Power, their affiliates, officers and employees from all claims, demands, losses, damages, costs, expenses and liability (legal, contractual or otherwise), which arise from or are in any way connected with any: (1) injury to or death of persons, (2) injury to property of Customer, (3) violation of any applicable laws, statutes or ordinances, or (4) any act omission or negligence of the trade ally.

Customer will allow, if requested, a representative from CLEAResult, Pacific Power, or any authorized third party reasonable access to Customer's property for inspections, including but not limited to: (a) post-installation equipment inspection to check implemented measures and to verify compliance with the program requirements; and (b) post-operation inspection to verify energy savings of the measures after a period of operation; and (c) inspection for any other reason.

Customer also consents to CLEAResult's use of Customer's name, program services, and resulting energy savings in reports or other documentation. Customer will obtain the approval of the property owner where the measure is to be installed prior to installation if Customer is not the owner. Customer agrees that information collected in this application may be used for marketing purposes. In addition, Customer acknowledges that information included in this application may be subject to public records requests as required by law. Customer and CLEAResult shall comply with all applicable laws at all times. It is Customer's responsibility to obtain all licenses, permits or other approvals required for installation of products or measures under the program. Customer is solely responsible for proper disposal of any and all removed products. Customer is solely responsible for the economic and technical feasibility, operational capability and reliability of Customer's installations, products and solutions. CLEAResult and Pacific Power make no representation or warranty and assume no liability with respect to services of any trade ally, quality, safety, performance or other aspect of any design, system or appliance installed pursuant to the program or this Incentive Application and expressly disclaim any such representation, warranty or liability. Under no circumstances shall CLEAResult or Pacific Power be liable for any monetary damages related to the program including any action or inaction of trade ally's performing work under the program. All projected savings are intended to be estimates and CLEAResult and Pacific Power do not guarantee any level of savings. The customer hereby transfers to Pacific Power all environmental attributes ("Environmental Attributes") attributable to program qualifying equipment or its operation. Environmental Attributes include any and all credits, benefits, emissions reductions, offsets and allowances, howsoever entitled, resulting from the avoidance of the emission of any substance to the air, soil or water at or by PacifiCorp generating facilities through reduced generation of energy or other savings or offsets on account of the qualifying equipment. The customer will not claim ownership of any Environmental Attributes. As long as the customer at the same time states the qualifying equipment was made possible with funding from Pacific Power, the customer may claim that it is facilitating the production of the Environmental Attributes attributable to the qualifying equipment.

Jury waiver: To the fullest extent permitted by law, each of the parties hereto waives any right it may have to a trial by jury in respect of litigation directly or indirectly arising out of, under or in connection with this agreement. Each party further waives any right to consolidate any action in which a jury trial has been waived with any other action in which a jury trial cannot be or has not been waived.

Terms & Conditions Continued

Application timeline: Incentive Application and required documents must be postmarked within 90 days of the service completion date. Incentive checks are issued within 45 days of receipt of the completed and approved Incentive Application. Incentives are not to exceed the purchase price of the equipment or service. Equipment and service work may be inspected for compliance. Incentives are subject to tariff approval and may change with 45 days' notice. Additional terms and conditions may apply.

Application details: If your Incentive Application is selected for inspection, it will not be processed until the review is satisfactorily completed. Pacific Power issues incentives in the form of checks not utility bill credits. Pacific Power is not responsible if your trade ally provides inaccurate information about the amount and/or conditions of the actual incentive and Pacific Power will not pay incentives for equipment that is mislabeled or misrepresented by trade allies regarding incentive qualifications. Households receiving incentives under the Home Energy Savings program may not receive equipment purchase and installation incentives under other Pacific Power company programs.

By providing Pacific Power with your e-mail address you agree that we may send you e-mails, occasional "breaking news" alerts and promotions from Pacific Power's Home Energy Savings program. We may also e-mail you occasionally with updates and information about the program. Should we elect to change our privacy policy we will post the changes at pacificpower.net/hes. Where the changes are significant, we may also choose to e-mail all our registered users with the new policy details.

Incentive Application must be postmarked within 90 days of the service completion date.