

Home Energy Savings Program HVAC Services Incentive Application

Utah Customers Only



Let's turn the answers on.

Thank you for being wattsmart and making your home more energy-efficient.

Please find guidelines below to determine if you qualify for an incentive and for directions on how to complete your incentive application. If approved, the incentive check will be issued to the primary name on the utility account. Incentive checks are issued within 45 days of receipt of your completed and approved application.

All required documentation must be postmarked **within 90 days of work completed date** (except central air conditioner best practices installation incentive). Please make a copy for your records and submit completed application and required documents to:

Rocky Mountain Power - Home Energy Savings program

Attn: UT HVAC

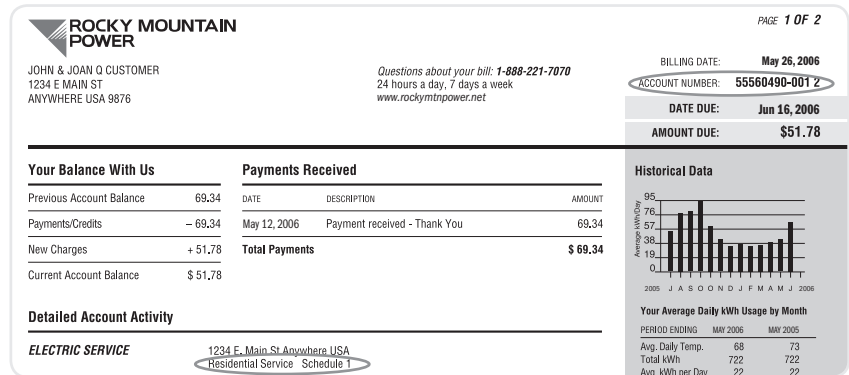
818 S.W. 3rd Avenue #215, Portland, OR 97204

Need help? Call 1-800-942-0266 or visit our website at rockymountainpower.net/hes

Getting started

- Follow best practices for hiring a trade ally*
 - Check website for list of **participating** or **qualified** program trade allies
 - Get multiple bids
 - Check licenses and references
 - Have a signed written proposal before work begins
- Confirm equipment or service qualifies for program incentives
 - Check the program website (rockymountainpower.net/hes)
 - Call the customer hotline 1-800-942-0266
 - Ask a participating or qualified program trade ally
- Check your bill to locate your account number and confirm service is on qualifying rate schedule 1, 2 or 3 (see image)

* A trade ally is a contractor or retailer who sells or installs equipment or performs services for home energy upgrades



Customer required documentation (incomplete applications may be delayed or denied)

For resources to help you fill out your application, visit rockymountainpower.net/utforms

1. Completed application
2. Itemized receipt/trade ally invoice including:
 - Description of qualified products and services (include all equipment model numbers and services)
 - Itemized costs
 - Work initiated **and** work completed dates
3. Any additional "Required Documentation" for each incentive (listed in each incentive section)
4. Copy of completed W-9 (for businesses receiving incentives)
5. Copy of completed Third Party Payment Addendum (for property owners and other third party entities not listed on account only)

Customer information

Customer or landlord account number _____ - _____

For account number call toll free **1-888-221-7070** or log in at **rockymountainpower.net**

Name on account _____ Daytime phone (_____) _____

Installation address _____ City _____ State _____ Zip _____

Mailing address _____ City _____ State _____ Zip _____

Email address _____ Email is the best way to contact me (*Email policy located in Terms & Conditions*)

- Third party payments:** please check this box if you are a property owner, landlord, property management company or homeowner association not listed on the account where qualified equipment was installed or services performed and you would like the incentive check(s) to be made payable to you. A completed Third Party Payment Addendum (available at rockymountainpower.net/utforms) must be submitted with incentive application for verification.
- Multifamily installation:** please check this box if this project was a multifamily installation (five or more attached units). Contact the program at 1-800-942-0281 for additional multifamily requirements including the mandatory pre-qualification and post-inspection process.

Household information

Your information will not be shared. It is used to determine eligibility, calculate energy savings and to improve our program.

Year house built (Required) _____		House square footage/living space (Required) _____		
Previous primary heat source: (Required) <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Electric ceiling/wall heat <input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric heat pump <input type="checkbox"/> Ductless heat pump <input type="checkbox"/> Natural gas furnace <input type="checkbox"/> _____	Current primary heat source: (Required) <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Electric ceiling/wall heat <input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric heat pump <input type="checkbox"/> Ductless heat pump <input type="checkbox"/> Natural gas furnace <input type="checkbox"/> _____	Previous primary cooling source: (Required) <input type="checkbox"/> Central air conditioner <input type="checkbox"/> Evaporative cooler <input type="checkbox"/> Electric heat pump <input type="checkbox"/> None <input type="checkbox"/> _____	Current primary cooling source: (Required) <input type="checkbox"/> Central air conditioner <input type="checkbox"/> Evaporative cooler <input type="checkbox"/> Electric heat pump <input type="checkbox"/> None <input type="checkbox"/> _____	Current water heater fuel: <input type="checkbox"/> Electric <input type="checkbox"/> Natural gas <input type="checkbox"/> Propane <input type="checkbox"/> _____
Do you rent or own? <input type="checkbox"/> Rent <input type="checkbox"/> Own	What is the age of the Rocky Mountain Power account holder? <input type="checkbox"/> 18 - 25 <input type="checkbox"/> 26 - 35 <input type="checkbox"/> 36 - 45 <input type="checkbox"/> 46 - 55 <input type="checkbox"/> 56 and over	Household income – approx. <input type="checkbox"/> up to \$24,999 <input type="checkbox"/> \$25,000 - \$34,999 <input type="checkbox"/> \$35,000 - \$49,999 <input type="checkbox"/> \$50,000 - \$74,999 <input type="checkbox"/> \$75,000 - \$99,999 <input type="checkbox"/> \$100,000 +	How did you hear about the Home Energy Savings program? <input type="checkbox"/> Friend/referral <input type="checkbox"/> Event <input type="checkbox"/> Trade ally <input type="checkbox"/> Retailer sales staff <input type="checkbox"/> TV/radio ad <input type="checkbox"/> Print ad <input type="checkbox"/> Bill stuffer <input type="checkbox"/> Online <input type="checkbox"/> Other _____	If you have seen program materials featuring a special code, please provide it here. Code _____
What is your gender? <input type="checkbox"/> Male <input type="checkbox"/> Female	Household size: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 +			

Qualifications

- Incentives are available for existing homes only and must be completed by a **participating** or **qualified** program trade ally. A list of program trade allies is available at rockymountainpower.net/uttradeallies.
- All HVAC equipment incentives require an Air Conditioning, Heating and Refrigeration Institute (AHRI) certificate to qualify. The AHRI Directory can be found online at ahridirectory.org.
- Incentive amount cannot exceed the total cost of the project.
- All required documentation must be postmarked within 90 days of work completed date (except central air conditioner best practices installation incentive). Invoice requirements provided under "**Customer required documentation**" on page 1.
- Program trade allies are required to complete measure specific program worksheets that must be submitted with the incentive application.
- Additional incentive-specific qualifications are listed in the tables below.

Additional incentives

- HVAC equipment (including evaporative coolers, gas furnaces, central air conditioners, etc.), insulation and windows incentives also available. Visit rockymountainpower.net/hes for details.

Please indicate the incentive(s) you are applying for by checking the applicable box(es):

<input type="checkbox"/> Central air conditioner best practices installation			
Requirements	Required documentation	Customer incentive	Trade ally incentive
<ul style="list-style-type: none"> • Work must be completed by a qualified program trade ally (NATE certified in air conditioning installations) • Equipment must be a new air-source split or packaged unitary air-conditioner with an Air-Conditioning, Heating and Refrigeration Institute (AHRI) Standard Rating Cooling Capacity of 65,000 Btu/hr (5.4 tons) or less • Split-system equipment must include a matched condensing unit and evaporator coil with an overall Seasonal Energy Efficiency Ratio (SEER) determined by AHRI Standard 210/240 and listed in the AHRI Certified Directory of Unitary Equipment. • Central air conditioner must be installed according to program requirements outlined in the Best Practices Installation worksheet and Utah HVAC Trade Ally Program Manual • Window air conditioning units, packaged terminal units and heat pumps are not eligible for these incentives • To ensure ambient air temperatures are warm enough to conduct required installation testing, incentive applications may be submitted up until 180 days into the following calendar year after the unit is installed (applies to central air conditioner best practices installation incentive only) 	<ul style="list-style-type: none"> • Itemized receipt/trade ally invoice • AHRI Certificate of Product Ratings • Completed Best Practices Installation worksheet • W-9 (for businesses receiving incentives) 	\$50	\$75
Condenser serial # _____			

<input type="checkbox"/> Central air conditioner proper sizing			
Requirements	Required documentation	Customer incentive	Trade ally incentive
<ul style="list-style-type: none"> • Work must be completed by either a participating or qualified program trade ally • Equipment must be a new air-source split or packaged unitary air-conditioner with an Air-Conditioning, Heating and Refrigeration Institute (AHRI) Standard Rating Cooling Capacity of 65,000 Btu/hr (5.4 tons) or less • Split-system equipment must include a matched condensing unit and evaporator coil with an overall Seasonal Energy Efficiency Ratio (SEER) determined by AHRI Standard 210/240 and listed in the AHRI Certified Directory of Unitary Equipment • Central air conditioner must be sized according to program requirements outlined in the Utah HVAC Trade Ally Program Manual • Window air conditioning units, packaged terminal units and heat pumps are not eligible for these incentives 	<ul style="list-style-type: none"> • Itemized receipt/ trade ally invoice • AHRI Certificate of Product Ratings • Manual J or equivalent load calculation • W-9 (for businesses receiving incentives) 	\$50	\$25
Condenser serial # _____			

<input type="checkbox"/> Central air conditioner tune-up			
Requirements	Required documentation	Customer incentive	Trade ally incentive
<ul style="list-style-type: none"> • Work must be completed by a qualified program trade ally • Incentive available on existing central air conditioners only • Existing central air conditioner must serve at least 80% of the home's conditioned floor area • Air flow test and performance check are required: <ul style="list-style-type: none"> - Air flow must meet minimum 350 CFM per ton requirement - Ask a qualified program trade ally about options for performance check - Program requirements outlined in the Tune-up worksheet and Utah HVAC Trade Ally Program Manual • Central air conditioner tune-up may only be performed when outdoor temperatures are above 65° F following performance check protocols • Incentives are limited to one tune-up incentive per unit every five years 	<ul style="list-style-type: none"> • Itemized receipt/ trade ally invoice • Completed Tune-up worksheet • W-9 (for businesses receiving incentives) 	\$20	N/A
Does central air conditioner serve at least 80% of home's conditioned floor area? <input type="checkbox"/> Yes <input type="checkbox"/> No			

<input type="checkbox"/> Heat pump tune-up			
Requirements	Required documentation	Customer incentive	Trade ally incentive
<ul style="list-style-type: none"> • Work must be completed by a qualified program trade ally • Incentive available on existing heat pumps only • Existing heat pump must serve at least 80% of the home's conditioned floor area • Air flow test and performance check are required: <ul style="list-style-type: none"> - Air flow must meet minimum 350 CFM per ton requirement - Ask a qualified program trade ally about options for performance check - Program requirements outlined in the Tune-up worksheet and Utah HVAC Trade Ally Program Manual • Heat pump tune-up may be performed year round following performance check protocols • Incentives are limited to one tune-up incentive per unit every five years 	<ul style="list-style-type: none"> • Itemized receipt/ trade ally invoice • Completed Tune-up worksheet • W-9 (for businesses receiving incentives) 	\$100	\$25
Does home's primary heat source (heat pump) serve at least 80% of home's conditioned floor area? <input type="checkbox"/> Yes <input type="checkbox"/> No			

<input type="checkbox"/> Duct sealing – electrically heated home only			
Requirements	Required documentation	Customer incentive	Trade ally incentive
<ul style="list-style-type: none"> • Work must be completed by either a participating or qualified program trade ally • Duct systems with previously installed insulation greater than R-2 are eligible for incentive • Minimum of 10 linear feet of exposed ductwork in an unconditioned space • CAZ testing is required • Incentive available in electrically heated home only • All physically accessible ducts located in unconditioned space must be sealed according to program requirements outlined in the Duct Sealing worksheet and Utah HVAC Trade Ally Program Manual 	<ul style="list-style-type: none"> • Itemized receipt/trade ally invoice • Completed Duct Sealing worksheet • W-9 (for businesses receiving incentives) 	\$200	\$50

Duct sealing and duct insulation

Requirements:

- Work must be completed by either a **participating** or **qualified** program trade ally
- Minimum of 10 linear feet of exposed ductwork in an unconditioned space
- CAZ testing is required
- All physically accessible ducts located in unconditioned space must be sealed and insulated according to program requirements outlined in the Duct Sealing and Duct Insulation worksheet and Utah HVAC Trade Ally Program Manual
- Pre-existing duct insulation levels must be less than or equal to R-2
- Duct work must be insulated to R-8 or greater
- Both services must be performed at the same time with insulation installed after the ducts are sealed

Home must have an **electric heating system** or an **electric cooling system** serving at least 80% of the home's conditioned floor area:

- Electrically heated home incentives apply to houses with a permanently installed ducted electric furnace or heat pump as the current primary heat source
 - Homes with an electric heating system **and** a central air conditioner will qualify for the electrically heated home incentive only
- Electrically cooled home incentives apply to houses with a permanently installed ducted electric central air conditioner as the current primary cooling source and a non-electric (gas, oil or propane) heating system

Incentive Options	Required documentation	Customer incentive	Trade ally incentive
<input type="checkbox"/> Home with electric heating	<ul style="list-style-type: none"> • Itemized receipt/trade ally invoice • Completed Duct Sealing and Duct Insulation worksheet • W-9 (for businesses receiving incentives) 	\$300	\$50

Does home's primary heat source (heat pump or electric furnace) serve at least 80% of home's conditioned floor area? Yes No

<input type="checkbox"/> Home with electric cooling	<ul style="list-style-type: none"> • Itemized receipt/trade ally invoice • Completed Duct Sealing and Duct Insulation worksheet • W-9 (for businesses receiving incentives) 	\$150	\$50
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Does home's primary cooling source serve at least 80% of home's conditioned floor area? Yes No

Super bundle

Requirements:

- A bonus incentive is available to customers who install weatherization and HVAC measures at the same time
- All requirements for individual incentives must be met and standard incentives will be paid on approved individual measures
- Additional bonus incentive will be paid after all “bundled” individual incentives are approved
- All individual incentive applications and required documentation must be **submitted as one package** at the same time
- Applications must be postmarked within 90 days of the work completed date (except central air conditioner best practices installation incentive)
- Only one bonus incentive offered for the lifetime of the home
- Available in single family homes only

Super bundle options (Individual incentives)	Bonus customer incentive
<input type="checkbox"/> Gas furnace and central air conditioner bundle <ul style="list-style-type: none">• 95% gas furnace with ECM• Central air conditioner with best practices installation and proper sizing• Attic insulation• Duct sealing and duct insulation	\$200 (^{\$} 1,200 cap on total combined incentives)

Customer acceptance of terms

I hereby certify that all information is accurate including claims of customer and equipment and service 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 trade allies. 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 Rocky Mountain Power may verify all the information provided. Incentive checks are paid to the Rocky Mountain Power account holder or verified third party payee. Customers are responsible for payment to trade allies. I authorize Rocky Mountain Power to share my information with Questar Gas for the purposes of energy efficiency program administration and project quality assurance purposes.

Customer signature _____ Date _____

Trade ally requirements

- Ensure that requested service qualifies for program incentives
- Conduct work in accordance with all program requirements
- Work with your customer to submit all required paperwork (must be postmarked within **90 days of work completed date** [except central air conditioner best practices installation incentive])

Trade ally information

Company name _____ Daytime phone (_____) _____

Mailing address _____ City _____ State _____ Zip _____

Technician name _____

Trade ally acceptance of terms

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

Trade ally signature _____ Date _____

Terms and conditions

Rocky Mountain 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 Portland Energy Conservation, Inc. ("PECI"). 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 rockymountainpower.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 90 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 rockymountainpower.net/hes for current program requirements.

Qualifying customers

Residential electric customers residing in the state of Utah who purchase their electricity from Rocky Mountain Power on rate schedules 1, 2 or 3 qualify. Landlords who own rental properties served by the company in the state of Utah where the tenant is billed on rate schedules 1, 2 or 3 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 rockymountainpower.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 PEGI, and Rocky Mountain 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 PEGI, Rocky Mountain 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 PEGI'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 PEGI 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. PEGI and Rocky Mountain 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 PEGI or Rocky Mountain 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 PEGI and Rocky Mountain Power do not guarantee any level of savings.

The customer hereby transfers to Rocky Mountain Power all "Environmental Attributes" attributable to the 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 Rocky Mountain 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.

Application timeline

Incentive Application and required documents must be postmarked within 90 days of work completed date (except central air conditioner best practices installation incentive). 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 application is selected for inspection, it will not be processed until the review is satisfactorily completed.

Rocky Mountain Power issues incentives in the form of checks not utility bill credits. Rocky Mountain Power is not responsible if your trade ally provides inaccurate information about the amount and/or conditions of the actual incentive and Rocky Mountain 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 Rocky Mountain Power company programs.

By providing Rocky Mountain Power with your e-mail address you agree that we may send you e-mails, occasional "breaking news" alerts and promotions from Rocky Mountain 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 rockymountainpower.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 work completed date (except central air conditioner best practices installation incentive).