

Home Energy Analysis Program HVAC Incentive Application



Customer Information

Last Name _____ First Name _____
 Home Phone _____ Cell Phone _____ Email _____
 Installed Address _____ City _____ State _____ Zip _____
 UES Electric Account # _____ Square Footage of Residence _____

Contractor Information

Company Name _____ Company ID _____ Install Date _____

HVAC & Duct Sealing Information

Existing Equipment

Central AC Heat Pump Cooling Capacity _____ Tons Rated SEER _____ /EER _____
 Manufacturer _____ Model # _____

New Equipment

Central AC-Split Central AC-Packaged Heat Pump-Split Heat Pump-Packaged
 AHRI # _____ Cooling Capacity _____ Tons
 SEER _____ EER _____ HSPF (if applicable) _____
 Manufacturer _____

Quality Installation

Charge (Check if within specification)
 Airflow (Check if within specification)
 Manual J (See attached form)

Table 1. HVAC Incentive Calculation

Measure Category	Equipment w/ Quality Installation	Downsizing	Max Allowed	Equipment Incentive
Replace on Burnout	\$250	\$150 <input type="checkbox"/> Yes <input type="checkbox"/> No	Max ROB Incentive: \$400	\$ _____
Early Retirement	\$900	\$150 <input type="checkbox"/> Yes <input type="checkbox"/> No	Max ER Incentive: \$1,050	\$ _____

Table 2. Duct Sealing Incentive Calculation

Measure	Incentive	Quantity	Installed Cost	Duct Sealing Incentive
Electric: Performance	• \$3.00 per CFM25 reduced • Lesser of \$650 or 50% of installed cost	CFM25 (See Duct Sealing Checklist for Conversions) Pre: _____ Post: _____ Reduction: _____	\$ _____	\$ _____
Total Requested				\$ _____

I hereby request an incentive for the above listed work. Attached is a copy of the final invoice that has been **signed by the homeowner**, showing the incentive amount deducted from the pretax total for the installed equipment. I have read and agree to the Terms and Conditions on the reverse of this form. I certify that the information that I have provided is true and correct and that the work performed and equipment installed meet the Program Guidelines and Terms and Conditions of the program.

Contractor Signature _____ Date _____

Application Checklist

Include all attachments:

- Copies of all invoices documenting the installation of the energy efficiency measures including equipment make, model, size, showing the Home Energy Analysis rebate as a discount and signed by the customer.
- Manual J Form
- Combustion Safety Form
- Duct Sealing Checklist Form
- Make sure the form is completely filled out, read all terms and conditions, and sign the application
- Make sure the customer's UES Electric account number is listed on the other side of this application
- Make a copy of the application for your records and mail original form with contractor invoice and related materials to: Home Energy Analysis Program, P.O. Box 12990, Tucson AZ, 85732-2990 or e-mail to UniSourceApps@csgrp.com.

Measure Eligibility

The home must receive electric service from UniSource Energy Services. Individual measure eligibility criteria are as follows and apply to both Replace on Burnout and Early Retirement HVAC incentives. For Early Retirement incentives, only existing HVAC systems that are fully operable and have nameplate SEER rating that is less than or equal to 10.0 are eligible.

Note: For all HVAC measures, including downsizing, ENERGY STAR Equipment, Quality Installation and Duct-Sealing are required. The Duct-Sealing incentive is based on the use of diagnostic equipment and measured reduction in duct-leakage.

HVAC ENERGY STAR Equipment: New equipment must meet or exceed minimum ENERGY STAR requirements as detailed below:

System Type	SEER	EER	HSPF
Central A/C – Split	≥14.5	≥12.0	n/a
Central A/C – Packaged	≥14.0	≥11.0	n/a
Heat Pump – Split	≥14.5	≥12.0	≥8.2
Heat Pump – Packaged	≥14.0	≥11.0	≥8.0

Quality Installation: Equipment must be installed in accordance with Program defined 'quality installation' criteria. Quality Installation includes proper sizing and matching system condenser and coil, correct refrigerant charge, and proper air-flow. Completion of a Manual J system sizing test is required and will be collected and reviewed by the Program Manager.

HVAC Equipment Downsizing: The contractor must demonstrate that the new system installed is at least 0.5 tons smaller than the system being replaced, yet still within the recommended sizing guidelines per the Manual J test.

Duct Sealing:

- Performance Duct Sealing: Work must be completed by a BPI certified contractor. Contractor must complete a duct-sealing check-list to record the actions taken to repair/seal leaks; however, the incentive is based on the performance tested pre and post duct-sealing leakage reductions as measured in CFM25 or CFM50. Acceptable methods of duct-leakage testing include: blower door subtraction method (CFM50), duct blaster (CFM25), pressure pans (CFM50). Test method must be specified on duct-sealing checklist, and if applicable, documentation of CFM50 to CFM25 conversion.

Combustion Safety Testing Requirement:

For all homes with combustion appliances such as a water heater, cooktop, etc., Combustion Safety Testing is required if the work involves any duct sealing or air sealing measures. Testing is done prior to and following the installation to ensure that no harmful combustion gases will enter the home. The Combustion Safety Form must be completely filled out and submitted with the other incentive documents.

Terms and Conditions

1. Customer Eligibility

Customers must occupy single family homes (detached homes, town homes, or other attached residential buildings) with up to four units currently receiving electric service from UniSource Energy Services. All installations must be done by qualified contractors that have registered with the Program and passed Program training on installation techniques and standards. The Incentive Application Form must be filled out completely, signed and accompanied by dated invoice copies. Please see the Measure Eligibility page for requirements specific to individual incentives.

2. For Early Retirement Incentive

Proof of qualifying equipment must be provided. Acceptable forms of proof include: Photo of Legible Nameplate and resource of SEER verification, Installation Invoice or Service documentation for equipment that documents Size and SEER, Manufacturer Documentation or Certificate that documents Size and SEER.

3. Installation Verification

Prior to honoring any incentive request, the Program Administrator reserve the right to conduct an on-site verification that the equipment and materials have been installed according to Program Guidelines and are in operation. This site visit, and all aspects related to the site visit, is conducted solely for such purpose. The site visit is not a safety review, nor is it intended for any other purpose.

4. Documentation

All invoices must include the Contractor name, address, phone number, installation cost, and an itemized description of the equipment, including manufacturer, model number, and the appropriate efficiency ratings (SEER, EER, and/or HSPF). Manual J input and output must be attached for Quality Installation and Downsizing incentives. For performance Duct Sealing, documentation of the remedies applied to the ducts must be attached. Invoices must show a line item reduction matching the incentive to be paid to the Contractor and labeled as the "Home Energy Analysis Program Incentive." All incentive applications with final corrections must be received by CSG within 60 days of the install date.

5. Warranties

UniSource Energy Services and the Program Administrator do not endorse, guarantee, or warrant any particular contractor, manufacturer, or installation.

6. Changes to Residential New HVAC Equipment Program

Program is subject to change without prior notice, and incentive offers may increase, decrease or be discontinued at any time.

7. Liability and Release

As part of the consideration for participating in the program, customer and contractor hereby release and shall indemnify, hold harmless, and defend UniSource Energy Services (UNS Electric, Inc. and UNS Gas, Inc.) and the Program Administrator from any and all claims, losses, harm, costs, liabilities, damages, and expenses (including attorneys' fees) of any nature whatsoever arising directly or indirectly out of or in connection with the installation of New HVAC Equipment at the premises or any material and labor required for such installation.