

## 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 10.

**Step 1: Determine Eligibility.** Equipment must be new and installed in a residence billed under an electric (or natural gas where applicable) 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 90 days of installation. Incomplete applications will cause delays in payment or denial of the application.

Email the application and all supporting documentation to: [Rebate@BrightEnergySolutions.com](mailto:Rebate@BrightEnergySolutions.com)

OR

Mail or fax the application and all supporting documentation to:

Hawarden Municipal Utilities  
1150 Central Ave  
Hawarden IA 51023  
Phone: (712) 551-4420  
Fax: (712) 551-1117

Please note: Hawarden Municipal Utilities and its supplemental power supplier, Missouri River Energy Services, are offering this Bright Energy Solutions Program. Hawarden Municipal Utilities and Missouri River Energy Services together will be referred to as "The Utility" throughout this document.



Please visit [www.brightenergysolutions.com](http://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	
Installation Address		City	State	ZIP Code
Mailing 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
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

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 or 15.0 SEER Rating		\$250/Unit		\$
Central Air Conditioner ≤ 5 Tons Split System	18.0 SEER		\$350/Unit		\$
Mini Split/Ductless Air Conditioner	16.0 SEER		\$250/Outdoor Condensing Unit		\$
<b>Subtotal Section A:</b>					<b>\$</b>

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

PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:

- 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.

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](http://www.ahridirectory.org)). All equipment installed must be new and all equipment removed must be properly disposed of – not reused or sold.

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<b>B. Natural Gas Furnaces</b>							
Incentives for programmable thermostats are available only when installed with a natural gas furnace or boiler.							
Equipment Type	Minimum Specifications	AHRI Reference Number	AFUE*	Input BTUH**	Incentive/Unit	Quantity	Total
Natural Gas Furnace	AFUE ≥ 96%				\$200/unit		\$
<b>Subtotal Section B:</b>							<b>\$</b>
<b>Required New Equipment Information (can be provided by contractor)</b>							
Furnace Manufacturer:		Model(s) Installed:		Serial Number(s) Installed:			
PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:							
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 manufacturer's name, model numbers, date of installation, installation address, and total project cost.							
All equipment installed must be new and all equipment removed must be properly disposed of – not reused or sold.							
*AFUE: Annual Fuel Utilization Efficiency							
**BTUH: British Thermal Units (BTU) per hour							

<b>C. Air Source Heat Pumps</b>					
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 per Unit	Quantity	Total
Air Source Heat Pump**	ENERGY STAR or 15.0 SEER, 8.5 HSPF		\$250		\$
Air Source Heat Pump**	18.0 SEER, 9.5 HSPF		\$350		\$
<b>BONUS for Qualifying Air Source Heat Pump using Natural Gas or Propane Furnace Backup</b>	Furnace Manufacturer:	Furnace Model Number:	<b>\$500</b>		<b>\$</b>
(ASHP must meet Minimum Specifications above. Mini-split/ductless systems do not qualify for bonus.)					
Mini Split/Ductless Air Source Heat Pump	16.0 SEER		\$250 per outdoor condensing unit		\$
<b>Subtotal Section D:</b>					<b>\$</b>
<b>Required New Equipment Information (can be provided by contractor)</b>					
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:	
PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:					
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.					
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 ( <a href="http://www.ahridirectory.org">www.ahridirectory.org</a> ).					
* All test results must be rated at full load AHRI standard testing conditions.					
** 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.					

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<b>D. Geothermal Heat Pumps</b> 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 < 11.25 Tons				\$200/ton	ENERGY STAR® (Tier 3) 17.1 EER 3.6 COP				\$
Open Loop Water to Air Ground Source Heat Pump < 11.25 Tons				\$200/ton	ENERGY STAR (Tier 3) 21.1 EER 4.1 COP				\$
Closed Loop Water to Water Ground Source Heat Pump < 11.25 Tons				\$200/ton	ENERGY STAR (Tier 3) 16.1 EER 3.1 COP				\$
Open Loop Water to Water Ground Source Heat Pump < 11.25 Tons				\$200/ton	ENERGY STAR (Tier 3) 20.1 EER 3.5 COP				\$
Direct Geo-exchange (DGX) < 11.25 Tons				\$200/ton	ENERGY STAR (Tier 3) 16.0 EER 3.6 COP				\$
<b>Desuperheater Bonus (Presence of Desuperheater Must be Clearly Stated on Invoice)</b>						Desuperheater Qty: _____ x			\$
\$250									\$
A desuperheater is used to heat domestic hot water for the residence.									\$
<b>Subtotal Section E:</b>								<b>\$</b>	
<b>Required New Equipment Information (can be provided by contractor)</b>									
<b>Geothermal Heat Pump Manufacturer:</b>									
<b>Installed Model Numbers:</b>					<b>Installed Serial Numbers:</b>				
<p>PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:</p> <ol style="list-style-type: none"> <li>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.</li> <li>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.</li> </ol>									
<p>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 less than 11.25 tons. Desuperheater incentive only applies to new installations of qualifying geothermal heat pumps.</p> <p>* 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 AHRI testing conditions. Units not listed at <a href="http://www.energystar.gov">www.energystar.gov</a> as ENERGY STAR qualified must meet equivalent minimum efficiency standards to be eligible. For multistage units the incentive minimum efficiency is based on ENERGY STAR's blended rating which is the average of the full load and part load efficiency ratings.</p>									

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<b>E. ENERGY STAR® Smart Thermostats</b>					
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
ENERGY STAR® certified Smart Thermostat Controlling Natural Gas Heat Systems	Not to Exceed 3 Per Household Annually	<input type="checkbox"/> Natural Gas Furnace With Central Air Conditioning <input type="checkbox"/> Natural Gas Furnace With NO Central Air Conditioning <input type="checkbox"/> Natural Gas Boiler With Central Air Conditioning <input type="checkbox"/> Natural Gas Boiler With NO Central Air Conditioning	\$25		\$
ENERGY STAR® certified Smart Thermostat Controlling Central Air Conditioning  (For Thermostats That Do Not Qualify for the Natural Gas Thermostat Incentives Above)	Not to Exceed 3 Per Household Annually	<input type="checkbox"/> Propane or Fuel Oil Furnace 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		\$
<b>Subtotal Section F:</b>					<b>\$</b>
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> <p>1) Invoice clearly showing proof of purchase including model numbers and total cost including labor if installed by a contractor.</p>					

<b>F. Natural Gas Water Heaters (ENERGY STAR Qualified)</b>				
Equipment	Criteria	Incentive Per Unit	Quantity	Total Incentive*
Storage (Tank Type) Water Heater ≤ 55 gal	ENERGY STAR®-compliant	\$ 50		\$
Whole-home Tankless Water Heater	ENERGY STAR®-compliant	\$200		\$
<b>Subtotal Section G:</b>				<b>\$</b>
Required New Equipment Information (can be provided by contractor)				
Gas Water Heater Manufacturer:	Model(s) Installed:	Serial Number(s) Installed:		
<p>PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS:</p> <p>1) Manufacturer's specification sheet or U.S. Government EnergyGuide (yellow label) showing proof of ENERGY STAR compliance.</p> <p>2) Invoice clearly showing proof of purchase including quantities, model numbers, installation date, 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. * Maximum incentive cannot exceed 75% of the total equipment cost.				

<b>G. Heat Pump Water Heaters (ENERGY STAR 55 Gallon or Smaller Qualified Self-Contained Units Only)</b> 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*
		Must be 55 Gallons or Smaller _____ GAL	ENERGY STAR Criteria: Uniform Energy Factor (UEF) ≥ 2.0		\$150	\$
		Must be 55 Gallons or Smaller _____ GAL	ENERGY STAR Criteria: Uniform Energy Factor (UEF) ≥ 2.0		\$150	\$
<b>Subtotal Section H:</b>						<b>\$</b>
PLEASE ATTACH THE FOLLOWING REQUIRED DOCUMENTS: <ol style="list-style-type: none"> <li>1. Manufacturer's specification sheet or U.S. Government EnergyGuide (yellow label) showing proof of ENERGY STAR compliance.</li> <li>2. Invoice clearly showing proof of purchase including quantities, model numbers, installation date, installation address, and total project cost.</li> </ol>						
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. * Maximum incentive cannot exceed 75% of the total equipment cost.						

<b>Summary of Incentives</b>	
Subtotal Section A: <b>Central Air Conditioning Units</b>	\$
Subtotal Section B: <b>Natural Gas Furnaces</b>	\$
Subtotal Section C: <b>Air Source Heat Pumps</b>	\$
Subtotal Section D: <b>Geothermal Heat Pumps</b>	\$
Subtotal Section E: <b>ENERGY STAR® Smart Thermostats</b>	\$
Subtotal Section F: <b>Natural Gas Water Heaters</b>	\$
Subtotal Section G: <b>Heat Pump Water Heaters</b>	\$
<b>Total Incentive:</b>	<b>\$</b>

## Certifications and Signature

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 the last page of this application form.

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.

Please sign and complete all information below.

Homeowner Signature	Print Name	Date
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## 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 and/or natural gas from The Utility are eligible to participate in the Bright Energy Solutions® Residential HVAC Incentive Program. Eligible equipment must be connected to an electric (or natural gas when applicable) service billed by The Utility under a residential rate class or serving residential space.
- 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 of the year indicated on this application. 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 90 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) Equipment must not be used to qualify and receive payment for energy savings from any wholesale electricity market.
  - e) Customers may only receive one incentive per piece of qualifying equipment.
  - f) All projects must be a retrofit / replacement installation in an existing residence or installation in new construction.
  - g) 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.
  - h) 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.