

CONSERVE & \$SAVE[®]

COMMERCIAL HEAT PUMPS REBATE APPLICATION

1. CUSTOMER INFORMATION (please print)

Account Name _____ Doing Business As (if different from Account Name) _____

Installation Address _____ City _____ State _____ Zip Code _____

Mailing Address (if different from above) (rebate check will be mailed here) _____ City _____ State _____ Zip Code _____

Account Number _____

Send us a rebate check. Apply rebate to our account. (Rebates \$75 and under will be applied to account.)

Type of Business: Church Government Grocery Health Industrial Lodging
 Multi-family Office Restaurant Retail School Other _____

How did you hear about CONSERVE & SAVE[®]? Billboard Chamber of Commerce Contractor Newspaper Radio
 Retailer/Vendor TV Utility Mailing Utility Newsletter Utility Representative Utility Web Site Other _____

2. CONTACT INFORMATION (please print)/CUSTOMER SIGNATURE

ATTENTION: ALL INVOICES OR RECEIPTS AND ALL SPECIFICATION SHEETS MUST BE INCLUDED WITH YOUR FULLY-COMPLETED AND SIGNED APPLICATION OR APPLICATION WILL BE RETURNED.

Contact Name (rebate check will be mailed to contact) _____ () _____
Daytime Phone Number

Email _____
I certify that all the information in the application (including any associated worksheets) is correct to the best of my knowledge. I have read and agree to the Terms and Conditions on the back of this application booklet. I understand that if any equipment in conjunction with this application is ordered, purchased, or installed before approval from The Utility is received, the proposed project may not qualify for a rebate.

Customer's Signature _____ Date _____

Check here if you DO NOT give us permission to use your business name in advertising our CONSERVE & SAVE[®] programs.

3. CONTRACTOR/VENDOR INFORMATION (please print)

Company Name _____

Address _____ City _____ State _____ Zip Code _____

Contact Name _____ () _____
Daytime Phone Number

Email _____

TEAMING UP TO SAVE YOU MONEY



OFFICE USE ONLY

Date Received _____

Pre-Inspected? YES NO Date _____ Initials _____

Post-Inspected? YES NO Date _____ Initials _____

TOTAL REBATE AMOUNT

\$

4. REBATE INFORMATION – GROUND SOURCE HEAT PUMPS

Project Type: RETROFIT NEW CONSTRUCTION

EXISTING (OLD) SYSTEM (if applicable):

COOLING			HEATING		
Code <i>(Table 1)</i>	Size of Unit <i>(Tons)</i>	Rated Efficiency <i>(enter value, then check SEER* or EER*)</i>	Equipment Type <i>(Furnace, Boiler, etc.)</i>	Rated Input <i>(BTU's)</i>	Rated Efficiency <i>(enter value, then check HSPF* or AFUE*)</i>
1.		<input type="checkbox"/> SEER <input type="checkbox"/> EER			<input type="checkbox"/> HSPF <input type="checkbox"/> AFUE
2.		<input type="checkbox"/> SEER <input type="checkbox"/> EER			<input type="checkbox"/> HSPF <input type="checkbox"/> AFUE
3.		<input type="checkbox"/> SEER <input type="checkbox"/> EER			<input type="checkbox"/> HSPF <input type="checkbox"/> AFUE
4.		<input type="checkbox"/> SEER <input type="checkbox"/> EER			<input type="checkbox"/> HSPF <input type="checkbox"/> AFUE
5.		<input type="checkbox"/> SEER <input type="checkbox"/> EER			<input type="checkbox"/> HSPF <input type="checkbox"/> AFUE
6.		<input type="checkbox"/> SEER <input type="checkbox"/> EER			<input type="checkbox"/> HSPF <input type="checkbox"/> AFUE
7.		<input type="checkbox"/> SEER <input type="checkbox"/> EER			<input type="checkbox"/> HSPF <input type="checkbox"/> AFUE

TABLE 1 – Existing Cooling Equipment Types	
Code	Equipment Description
UT-1	Rooftop/Packages AC: Less than or equal to 65,000 BTU/hour (5.4 Tons)
UT-2	Rooftop/Packages AC: 65,001 – 134,999 BTU/hour (5.4 – 11.2 Tons)
UT-3	Rooftop/Packages AC: 135,000 – 239,999 BTU/hour (11.2 – 20 Tons)
UT-4	Rooftop/Packages AC: 240,000 – 759,999 BTU/hour (20 – 63.3 Tons)
UT-4	Rooftop/Packages AC: 760,000 BTU/hour and greater (63.3+ Tons)
PTAC	Packaged Terminal Units (all sizes)
PTHP	Packaged Terminal Heat Pump Units (all sizes)

***Efficiency Ratings by AHRI (www.ahridirectory.org):**

- AFUE = Annual Fuel Usage Efficiency*
- COP = Coefficient of Performance*
- EER = Energy Efficiency Rating (low speed)*
- HSPF = Heating Seasonal Performance Factor*
- SEER = Seasonal Energy Efficiency Rating*

NEW SYSTEM:

Date Installed: _____ Project Cost: (materials and labor) \$ _____

Loop Type: Horizontal Vertical Slinky Other _____

Total Cooling Capacity: _____ BTU's Total Heating Capacity: _____ BTU's Supplemental Heat Installed: No Yes kW _____

Desuperheater Installed? Yes No Water Heating: Electric Gas Size of Water Heater in Gallons: _____

GROUND SOURCE HEAT PUMPS:													
A	B	C	D	E	F	G	H	I	J	K	L	M	N
Code (Table 2)	Manufacturer Name	Model Number	Size (Tons)	Qty.	Annual Cooling Hours (Table 3)	Annual Heating Hours	AHRI Reference Number*	Minimum EER (Table 2)	Rated EER	Rated COP	Base Rebate (D x E x \$200)	EER Bonus Rebate** (J-I) x (D x E x \$25)	Total Rebate (L + M)
1.											\$	\$	\$
2.											\$	\$	\$
3.											\$	\$	\$
4.											\$	\$	\$
5.											\$	\$	\$
6.											\$	\$	\$
DESUPERHEATER REBATE: Qty: _____ X \$250												\$	

* **Qualifying Water-to-Air Ground Source Heat Pump** efficiency ratings are determined using the Air Conditioning, Heating, and Refrigeration Institute's (AHRI) directory, which may be found at www.ahridirectory.org. EER rating is at AHRI/ISO 13256-1 cooling conditions of 77°F entering water temperature and 80.6°F dry bulb/66.2°F wet bulb entering air temperature (ground loop heat pump). **A copy of the manufacturer's applicable unit rating must accompany this application.**

Qualifying Water-to-Water Ground Source Heat Pump efficiency ratings are determined using the Air-Conditioning, Heating, and Refrigeration Institute's (AHRI) directory, which may be found at www.ahridirectory.org. EER rating is at ISO 13256-2 cooling conditions of 77°F entering water temp. and 53.6°F leaving water temperature (ground loop heat pump). **A copy of the manufacturer's applicable unit rating must accompany this application.**

Qualifying Direct Exchange Ground Source Heat Pumps must be rated in accordance with the AHRI 870 rating conditions. **Please include manufacturer's specification sheets verifying this information.**

Code	Qualifying Equipment	Minimum Efficiency	Base Rebate (\$/Ton)	EER Bonus Rebate** (\$/Ton)
CL-W2A	Closed-Loop Water-to-Air GSHP	17.1 EER and 3.6 COP	\$200	\$25
CL-W2W	Closed-Loop Water-to-Water GSHP	16.1 EER and 3.1 COP	\$200	\$25
OL-W2A	Open-Loop Water-to-Air GSHP	21.1 EER and 4.1 COP	\$200	\$25
OL-W2W	Open-Loop Water-to-Water GSHP	20.1 EER and 3.5 COP	\$200	\$25
DGX	Direct Exchange GSHP	16.0 EER and 3.6 COP	\$200	\$25

**EER Bonus Rebate provides an additional incentive for each 1.0 EER above the Minimum Efficiency.

TOTAL REBATE AMOUNT \$

Business Type	Estimated Hours
Convenience Store	986
Education – Community College	785
Education – Primary	408
Education – Secondary	563
Health/Medical – Clinic	865
Health/Medical – Hospital	1,298
Lodging	754
Manufacturing	589
Office – Low Rise	446
Office – Mid Rise	651
Office – High Rise	1,263
Restaurant	652
Retail – Large Department Store	686
Retail – Strip Mall	574
Warehouse	409

GROUND SOURCE HEAT PUMP SYSTEMS – INSTALLATION CHECKLIST

THE CONTRACTOR MUST COMPLETE THE FOLLOWING ITEMS AND REVIEW THIS CHECKLIST IN THE PRESENCE OF THE OWNER!

- 1. The heat pump unit(s) is(are) resting on a one piece, sound absorbing pad that completely supports the base of the unit(s), or is suspended with recommended hangers and fittings that completely isolate noise and vibrations from any living areas.
- 2. The size, location, and configuration of the complete heat pump system is as promised in the purchase agreement.
- 3. All major components of the heat pump system have been identified and their functions explained.
- 4. The unit(s) has(have) been operated in both the heating and cooling modes to demonstrate the soundness of normal operation. The contractor also agrees to check the outdoor loop for proper operation, i.e. system loop has been purged and pressurized per manufacturer’s specifications.
- 5. Air temperatures in both heating and cooling have been demonstrated and fall within manufacturer’s specifications.
- 6. All heating and cooling thermostat functions have been explained.
- 7. If auxiliary heat exists, the reason for auxiliary heat and when it is needed has been discussed.
- 8. Unit(s) run times at various temperatures have been discussed.
- 9. Filter maintenance has been explained and demonstrated.
- 10. All fault lights have been explained [thermostat and unit(s)] - when and how to reset unit in case of an emergency.
- 11. Ductwork is installed in a neat and professional manner.
- 12. Ductwork is isolated from the heat pump unit(s) by flexible connectors, and the supply and return plenum is internally insulated or constructed of fiberglass duct board.
- 13. Ductwork in unconditioned areas is sealed and insulated.
- 14. Airflow to each room is even and acceptable. (Unless conditions exist that are not correctable.)
- 15. All inside loop piping and piping from unit(s) to water heater is installed in a neat and professional manner and is fully insulated.
- 16. Rough grade and backfill has been completed.
- 17. The owner has been given a copy of the "As Built Site Plan" for the loop.
- 18. All structural and cosmetic repairs have been completed.
- 19. Anticipated operating costs have been estimated and discussed.
- 20. Warranty coverage (standard and optional extended warranties) has been explained and warranty information turned in to manufacturer.
- 21. A second meter has been installed for RPU customers who choose to participate in the High Efficiency HVAC Rate program. (For more information, visit www.rpu.org or contact an RPU Commercial Account Representative.)**
- 22. All work areas have been left clean and tidy.

THE ABOVE ITEMS HAVE BEEN COMPLETED, REVIEWED, ARE UNDERSTOOD, AND AGREED TO. Note exceptions here:

Owner Signature: _____ Date: _____

Contractor Signature: _____ Date: _____

5. REBATE INFORMATION – AIR SOURCE HEAT PUMPS

Project Type: RETROFIT NEW CONSTRUCTION

EXISTING (OLD) SYSTEM (if applicable):

A	B	C
Size (Tons)	Rated Efficiency (enter value, then check SEER or EER)*	Quantity
1.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	
2.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	
3.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	
4.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	
5.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	
6.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	

TABLE 4 – Air Source Heat Pumps – Qualifying Efficiencies and Rebate Schedule

Code	Qualifying Equipment	Minimum Efficiency	Base Rebate (\$/Ton)	Efficiency Bonus** Rebate (\$/Ton)
ASHP-1	Split Systems & Single Package, less than 65,000 BTU/hour	14.0 SEER	\$75	\$5
ASHP-2	Split Systems & Single Package, 65,001-134,999 BTU/hour	10.8 EER	\$75	\$5
ASHP-3	Split Systems & Single Package, 135,000-239,999 BTU/hour	10.7 EER	\$75	\$5
ASHP-4	Split Systems & Single Package, 240,000 BTU/hour and greater	10.2 EER	\$75	\$5

TABLE 5 – GUIDELINES FOR COOLING HOURS

Business Type	Estimated Hours	Business Type	Estimated Hours	Business Type	Estimated Hours
Convenience Store	986	Health/Medical – Hospital	1,298	Office – High Rise	1,263
Education – Community College	785	Lodging	754	Restaurant	652
Education – Primary	408	Manufacturing	589	Retail – Large Department Store	686
Education – Secondary	563	Office – Low Rise	446	Retail – Strip Mall	574
Health/Medical – Clinic	865	Office – Mid Rise	651	Warehouse	409

NEW SYSTEM:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Code (Table 4)	Manufacturer Name	Model Number	Size (Tons)	Qty.	Annual Cooling Hours (Table 5)	AHRI Reference Number*	Minimum Efficiency (Table 4)	Rated Efficiency^ (SEER or EER)	Equipment Cost	Base Rebate (\$/Ton) (Table 4)	Base Rebate (D x E x K)	Eligible Efficiency Bonus (I – H)	Efficiency Bonus Rebate (\$/Ton) (Table 4)	Efficiency Bonus Rebate (M x N) x (D x E) x 10	Total Rebate (L + O)
1.								<input type="checkbox"/> SEER <input type="checkbox"/> EER	\$	\$75	\$		\$5	\$	\$
2.								<input type="checkbox"/> SEER <input type="checkbox"/> EER	\$	\$75	\$		\$5	\$	\$
3.								<input type="checkbox"/> SEER <input type="checkbox"/> EER	\$	\$75	\$		\$5	\$	\$
4.								<input type="checkbox"/> SEER <input type="checkbox"/> EER	\$	\$75	\$		\$5	\$	\$
5.								<input type="checkbox"/> SEER <input type="checkbox"/> EER	\$	\$75	\$		\$5	\$	\$
6.								<input type="checkbox"/> SEER <input type="checkbox"/> EER	\$	\$75	\$		\$5	\$	\$

*Efficiency Ratings by AHRI (www.ahridirectory.org): SEER = Seasonal Energy Efficiency Rating; EER = Energy Efficiency Rating

**Efficiency Bonus Rebate provides an additional incentive for each 0.1 SEER or EER above the Minimum Efficiency.

^Please enter Rated Efficiency value and then check SEER or EER.

TOTAL REBATE AMOUNT \$

Qualifying Air Source Heat Pumps must have been rated in accordance with the most recent version of AHRI Standard 210/240 if less than or equal to 65,000 BTU/hour and AHRI 340/360 if above 65,000 BTU/hour, and have nameplate data stamped with the SEER/EER. If equipment is larger than the AHRI Standard certification process, it must be listed as a standard combination in manufacturer's literature. **A copy of the manufacturer's applicable unit rating must accompany this application.** The AHRI directory and standards are located at www.ahridirectory.org.

6. REBATE INFORMATION – WATER SOURCE HEAT PUMPS

Project Type: RETROFIT NEW CONSTRUCTION

EXISTING (OLD) SYSTEM (if applicable):

A	B	C
Size^ (Tons)	Rated Efficiency (enter value, then check SEER or EER)*	Quantity
1.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	
2.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	
3.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	
4.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	
5.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	
6.	<input type="checkbox"/> SEER <input type="checkbox"/> EER	

TABLE 6 – Water Source Heat Pumps – Qualifying Efficiencies and Rebate Schedule

Code	Qualifying Equipment	Minimum Efficiency	Base Rebate (\$/Ton)	Efficiency Bonus** Rebate (\$/Ton)
WSHP-1	Water Source Heat Pump, less than 17,000 BTU/hour	13.2 EER	\$75	\$5
WSHP-2	Water Source Heat Pump, equal to or greater than 17,000 BTU/hour	13.2 EER	\$75	\$5

TABLE 7 – GUIDELINES FOR COOLING HOURS

Business Type	Estimated Hours	Business Type	Estimated Hours	Business Type	Estimated Hours
Convenience Store	986	Health/Medical – Hospital	1,298	Office – High Rise	1,263
Education – Community College	785	Lodging	754	Restaurant	652
Education – Primary	408	Manufacturing	589	Retail – Large Department Store	686
Education – Secondary	563	Office – Low Rise	446	Retail – Strip Mall	574
Health/Medical – Clinic	865	Office – Mid Rise	651	Warehouse	409

NEW SYSTEM:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Code (Table 6)	Manufacturer Name	Model Number	Size^ (Tons)	Qty.	Annual Cooling Hours (Table 7)	Minimum Efficiency (Table 6)	AHRI EER Rating	Equipment Cost	Base Rebate (\$/Ton) (Table 6)	Base Rebate (\$/Ton) (D x E x J)	Eligible Efficiency Bonus (H – G)	Efficiency Bonus Rebate (\$/Ton) (Table 6)	Efficiency Bonus Rebate (L x M) x (D x E) x 10	Total Rebate (K + N)
1.								\$	\$75	\$		\$5	\$	\$
2.								\$	\$75	\$		\$5	\$	\$
3.								\$	\$75	\$		\$5	\$	\$
4.								\$	\$75	\$		\$5	\$	\$
5.								\$	\$75	\$		\$5	\$	\$
6.								\$	\$75	\$		\$5	\$	\$

*Efficiency Ratings by AHRI (www.ahridirectory.org): SEER = Seasonal Energy Efficiency Rating; EER = Energy Efficiency Rating

**Efficiency Bonus Rebate provides an additional incentive for each 0.1 EER above the Minimum Efficiency.

^Cooling Tons = BTU/hour cooling capacity ÷ 12,000

Qualifying Water Source Heat Pump efficiency ratings are determined using the Air Conditioning, Heating, and Refrigeration Institute's (AHRI) directory, which may be found at www.ahridirectory.org. EER rating is at AHRI/ISO 13256-1 cooling conditions of 86° F entering water temperature and 80.6° F dry bulb/66.2° F wet bulb entering air temperature (water loop heat pump).

A copy of the manufacturer's applicable unit rating must accompany this application.

TOTAL REBATE AMOUNT \$

7. TERMS AND CONDITIONS

1. ELIGIBILITY

Rebates are available to non-residential electric customers of Austin Utilities, Owatonna Public Utilities, and Rochester Public Utilities (herein referred to as The Utility). All products must be in use in facilities in The Utility service territory.

2. APPLICATION

Program is offered January 1 through December 31 of the respective calendar year. **Due to limited funding, this rebate offer can be changed or withdrawn at any time without notice and is available on a first-come, first-serve basis.** The entire rebate application must be read and filled out completely or application will be returned.

3. INSPECTION AND VERIFICATION

The Utility reserves the right to inspect the customer's facility through on-site visits before and after new equipment installation to verify rebate eligibility.

4. INSTALLATION AND REBATE AMOUNTS

Qualifying energy-efficient equipment installed and operational within six (6) months of the date of purchase are eligible for rebate. Additional time may be granted subject to the Utility's pre-approval. In no case will the rebate paid by The Utility exceed the purchase price of the equipment. The maximum rebate amount is \$100,000 per customer location per technology per year. The Utility can, at its sole discretion, increase rebate amounts.

5. INVOICE AND PAYMENT

Following inspection and verification (see #3) and completed installation, the customer must notify The Utility and submit original invoices specifying the quantity and price of all materials purchased, the date ordered, installation costs, and applicable taxes. After satisfactory review of the application and invoices, a rebate check or bill credit will be issued to the customer. Please allow 6-10 weeks from the date of application submission for delivery of rebate check or bill credit.

6. EQUIPMENT ELIGIBILITY REQUIREMENTS

Equipment must be new. Eligible high-efficiency heat pumps must meet or exceed The Utility's minimum efficiency requirements as identified in Tables 2, 4, and 6 according to its qualifying equipment description/category.

• GROUND SOURCE HEAT PUMPS

Qualifying Water-to-Air Ground Source Heat Pump efficiency ratings are determined using the Air Conditioning, Heating, and Refrigeration Institute's (AHRI) directory, which may be found at www.ahridirectory.org. EER rating is at AHRI/ISO 13256-1 cooling conditions of 77°F entering water temperature and 80.6°F dry bulb/66.2°F wet bulb entering air temperature (ground loop heat pump). A copy of the manufacturer's applicable unit rating must accompany this application.

Qualifying Water-to-Water Ground Source Heat Pump efficiency ratings are verified using manufacturer specifications which clearly demonstrate the Entering Water Temperature (EWT), Gallons Per Minute (GPM) water flow, and the associated EER rating. EER rating is at AHRI/ISO 13256-2 cooling conditions of 77°F entering water temperature and 53.6°F leaving water temperature (ground loop heat pump). Please include manufacturer's specification sheets verifying this information.

Qualifying Direct Exchange Ground Source Heat Pumps must be rated in accordance with the AHRI 870 rating conditions. Please include manufacturer's specification sheets verifying this information.

• AIR SOURCE HEAT PUMPS

Qualifying air source heat pumps must have been rated in accordance with the most recent version of AHRI Standard 210/240 if less than or equal to 65,000 BTU/hour and AHRI 340/360 if above 65,000 BTU/hour, and have nameplate data stamped with the SEER/EER. If equipment is larger than the AHRI Standard certification process, it must be listed as a standard combination in manufacturer's literature. A copy of the manufacturer's applicable unit rating must accompany this application. The AHRI directory and standards are located at www.ahridirectory.org. Eligible air source heat pumps must replace cooling equipment of lesser efficiencies and of equivalent or greater capacity (Tons or BTU's/hr) to qualify for a rebate.

• WATER SOURCE HEAT PUMPS

Qualifying water source heat pump efficiency ratings are determined using the Air Conditioning, Heating, and Refrigeration Institute's (AHRI) directory, which may be found at www.ahridirectory.org. Efficiency rating (EER) is at AHRI/ISO 13256-1 cooling conditions. A copy of the manufacturer's applicable unit rating must accompany this application. Eligible water source heat pumps must replace cooling equipment of lesser efficiencies and of equivalent or greater cooling capacity (Tons or BUT/hour) to qualify for a rebate.

7. TAX INFORMATION

The Utility will not be responsible for any tax liability imposed as a result of the rebate payment(s). Customers are advised to consult their tax advisors for details.

8. DISCLAIMER

The Utility does not guarantee that the implementation of energy-efficient measures or use of the equipment purchased or installed pursuant to this program will result in energy or cost savings. The Utility makes no warranties, expressed or implied, with respect to any equipment purchased or installed including, but not limited to, any warrant of merchantability or fitness for purpose. In no event shall The Utility be liable for any incidental or consequential damages. Customers are solely responsible for the proper disposal of existing equipment. Consult the Minnesota Pollution Control Agency (MPCA) office for details at (800) 657-3864.

9. ENDORSEMENT

The Utility does not endorse any particular vendor, manufacturer, product, or system in promoting this rebate program. Listing a vendor or product does not constitute an endorsement, nor does it imply that unlisted vendors or products are deficient or defective in any way.

10. PRIVACY

Information contained in this rebate application may be shared with the Minnesota Department of Commerce and our co-op partners and also may be used in our advertising efforts with your permission as granted in Section 2 of this rebate application.

RETURN COMPLETED APPLICATION AND REQUIRED DOCUMENTATION TO YOUR UTILITY PROVIDER:

Austin Utilities
Attn: Rebate Processing
400 - 4th Street NE
Austin, MN 55912
(507) 433-8886
(507) 433-5045 fax
www.austinutilities.com

Owatonna Public Utilities
Attn: Rebate Processing
P.O. Box 800
Owatonna, MN 55060
(507) 451-2480
(507) 451-4940 fax
www.owatonnautilities.com

Rochester Public Utilities
Attn: Rebate Processing
4000 East River Road NE
Rochester, MN 55906-2813
(507) 280-1500
(507) 280-1542 fax
www.rpu.org