

HEATING AND COOLING IMPROVEMENTS INCENTIVE APPLICATION

FOR EXISTING SINGLE FAMILY HOMES OR MULTIFAMILY DWELLINGS WITH 3 OR FEWER UNITS

Complete this application for qualified equipment installed between January 1, 2016 and June 30, 2016. Please return the signed, completed application and copy of sales invoice postmarked within 60 days of installation. **Missing information will delay processing.** Visit focusonenergy.com/terms for program terms and conditions or call to request a copy be mailed to you. For questions regarding this application, call 800.762.7077.

SECTION 1: UTILITY ACCOUNT HOLDER INFORMATION

How did you hear about the program? Community Association/Agency Contractor/Trade Ally Direct Mail Friend/Neighbor
 Internet Utility Company Other (please describe) _____

Name of Electric Utility: (For installation site)	Electric Utility Account Number:
Name of Gas Utility: (For installation site)	Gas Utility Account Number:
First Name:	Last Name:
Phone Number:	Email:

SECTION 2: INSTALLATION SITE INFORMATION

Installation Site Address:	City:	State: WI	Zip:
Site has Central Air Conditioning/ Air Source Heat Pump: <input type="checkbox"/> Yes <input type="checkbox"/> No	Heating System Type: <input type="checkbox"/> Furnace <input type="checkbox"/> Boiler <input type="checkbox"/> Air Source Heat Pump <input type="checkbox"/> Other: _____	Fuel Used for Home Heating: <input type="checkbox"/> Natural Gas <input type="checkbox"/> Propane <input type="checkbox"/> Oil <input type="checkbox"/> Electric <input type="checkbox"/> Other: _____	This is a(n): (New construction is not eligible for these incentives) <input type="checkbox"/> Existing Home <input type="checkbox"/> New Construction

SECTION 3: PAYMENT INFORMATION

Make Check Payable to: First and Last Name: <input type="checkbox"/> Customer <input type="checkbox"/> Landlord <input type="checkbox"/> Trade Ally (participating contractor)	Send Check Attention of: (Complete if needed for mailing)	Phone:
Mailing Address:	City:	State: Zip:
Tax Status: (Complete only if Landlord Payee) <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> LLC <input type="checkbox"/> Other: _____	Tax ID Number: (Provide one; Only if Landlord is Payee) FEIN #: _____ - _____ - _____ OR SSN: _____ - _____ - _____	

SECTION 4: CONTRACTOR INFORMATION

Company/Business Name:	Email:	Phone:
Address:	City:	State: Zip:

SECTION 5: APPLICATION SIGNATURES (Please read the complete application and sign)

I, the undersigned, agree that the stated energy efficient improvements were installed at the project site address listed above and that I am authorized to sign this application. I have read and agree to the provisions set forth herein and to the Terms and Conditions posted at focusonenergy.com/terms. I understand Focus on Energy may revise these Terms and Conditions at any time and I will not be notified in the event changes are made. To the best of my knowledge, the statements made on this application are complete, true and correct, and I have submitted the appropriate supporting documentation to receive an incentive. **I certify that I am applying under the Home Performance with ENERGY STAR[®] Program for the designated incentive amount and hereby vacate any opportunity to request that an incentive for the equipment noted on this application be processed at the Tier 2 incentive amount. Any past or forthcoming notification of income eligibility becomes null and void for use in obtaining an incentive for the equipment noted on this application. If Trade Ally is checked for payment in Section 3, I have confirmed that the incentive has been applied as an instant discount on the invoice.**

Incentive I am applying for: <input type="checkbox"/> Tier 1 <input type="checkbox"/> Tier 2 (I have attached my Income Eligibility Approval Letter or Income Eligibility Application to obtain my Tier 2 incentive)	<input type="checkbox"/> Itemized contractor invoice is attached.
Applicant Signature:	Date:
Print Name:	

\$250 BONUS when you complete Whole Home Improvements and Heating and Cooling Improvements together
Tier 1 only. Must be completed within 90 days of each other.

To save even more and make your home more comfortable, receive an additional \$250 bonus when you make air sealing and insulation improvements within 90 days of installing your qualified heating equipment. Work must be completed by a qualified Home Performance with ENERGY STAR Trade Ally.

FORM SUBMITTAL - Return signed, completed application and copy of sales invoice to:

Mail: Focus on Energy, 222 W. Washington Ave., Suite 470, Madison, WI 53703-2793

Email: homerewards@focusonenergy.com **Fax:** 888.627.0938 **Questions:** 800.762.7077

Prefer to go paperless? Complete your application online at: focusonenergy.com/myhome

ARE YOU ELIGIBLE FOR TIER 2 INCENTIVES?

You may be eligible for higher incentives through the Home Performance with ENERGY STAR® program. To qualify, your household must have a gross income of less than 80 percent of the state median income (SMI) as determined by the value indicated in the income eligibility self-screening chart below. **Note:** Tier 2 incentives require pre-approval. Please complete the Income Eligibility Application available at focusonenergy.com/myhome for fast and confidential pre-approval for Tier 2 incentives. Customers cannot receive both Tier 1 and Tier 2 incentives for the same equipment.

INCOME ELIGIBILITY CHART

STATE MEDIAN INCOME (SMI) LIMITS BY HOUSEHOLD SIZE (2016) HOUSEHOLD INCOME												
HOUSEHOLD SIZE	1	2	3	4	5	6	7	8	9	10	11	12
ANNUAL INCOME 80% SMI	\$34,134	\$44,637	\$55,140	\$65,642	\$76,145	\$86,648	\$88,617	\$90,587	\$92,556	\$94,525	\$96,494	\$98,464
3 MONTH INCOME 80% SMI	\$8,534	\$11,159	\$13,785	\$16,411	\$19,036	\$21,662	\$22,154	\$22,647	\$23,139	\$23,631	\$24,124	\$24,616

INCENTIVES AND EQUIPMENT INFORMATION

Complete the below chart per your installed equipment. **Fill out ALL information fields for your selected equipment.** Installed equipment must meet all eligibility requirements on pages 3-4 to qualify for an Incentive. Attach copy of this page for additional models installed. **See Tier 2 income eligibility requirements in above section. For Tier 2 Incentives, please submit your approved income eligibility letter with this application.**

EQUIPMENT	MANUFACTURER/BRAND	MODEL NUMBER	TIER 1 INCENTIVE	TIER 2 INCENTIVE	INSTALLED DATE	INSTALLED COST
FURNACES						
<input type="checkbox"/> 90%+ AFUE Propane Furnace with ECM			\$100	\$300		
<input type="checkbox"/> 95%+ AFUE Natural Gas Furnace			N/A	\$350		
<input type="checkbox"/> 95%+ AFUE Multi-stage Natural Gas Furnace with ECM			\$125	\$525		
FURNACE/AC COMBO						
<input type="checkbox"/> 95%+ AFUE Multi-stage Natural Gas Furnace with ECM & 16 SEER Central AC	Furnace/Air Handler		\$250	\$750		
	Indoor Unit (Coil)					
	Outdoor Unit (Condenser)					
AHRI Number:						
AIR SOURCE HEAT PUMP						
<input type="checkbox"/> Air Source Heat Pump 16+ SEER	Furnace/Air Handler (can be existing or new)		\$300	\$300		
	Indoor Unit (Coil)					
	Outdoor Unit (Condenser)					
AHRI Number:						
ECM REPLACEMENT						
<input type="checkbox"/> Must replace existing PSC motor			\$100	\$100		
HIGH EFFICIENCY BOILERS						
<input type="checkbox"/> Natural Gas Home Heating Boiler (95%+ AFUE)			\$400	\$550		
INDIRECT WATER HEATERS						
<input type="checkbox"/> Indirect Water Heater for Home Heating Boiler			\$100	\$150		
COMBINATION BOILERS						
<input type="checkbox"/> Natural Gas Combination Boiler (95%+ AFUE)			\$500	\$675		
SMART THERMOSTATS	BRAND	MODEL	SERIAL NUMBER OR MAC ID			
<input type="checkbox"/> Eligible smart thermostat must be installed with a program-qualified furnace, boiler or air source heat pump.			\$75	\$75		

TOTAL REQUESTED INCENTIVE AMOUNT:

HIGH EFFICIENCY FURNACES

General Requirements for High Efficiency Furnace Incentives:

- Furnaces must be a sealed combustion unit.
- Furnaces must be the primary heating source for the home's living space.
- Chimney liners must be installed where a high-efficiency gas furnace replaces an atmospherically-drafted furnace and only a water heater remains vented through the chimney. The interior opening left by the removed furnace must be closed with a metal cap and sealed with caulk or mortar.

90% AFUE Propane Furnace with ECM - \$100 Tier 1 Incentive; \$300 Tier 2 Incentive:

- Furnace must have an annual fuel utilization efficiency (AFUE) of 90 percent or greater.
- Must be customer of a participating electric utility.
- Propane furnaces are eligible. Electric and natural gas furnaces are not eligible.
- Furnaces have a multi-stage or modulating burner.
- Furnaces must have an electronically commutated motor (ECM). An ECM is sometimes referred to as a variable speed, constant-airflow, constant torque, electronically efficient (EEM), or X-13 motor. A permanent split capacitor motor (PSC), single- or multi-speed, does not qualify. A Pre-Qualified Equipment List is available at focusonenergy.com/myhome.

95% or greater AFUE Natural Gas Furnace with ECM - \$125 Tier 1 Incentive; \$525 Tier 2 Incentive:

- Furnace must have an AFUE of 95 percent or greater.
- Must be customer of a participating electric utility and a participating natural gas utility. Customer must use natural gas for home heating.
- Only natural gas furnaces are eligible.
- Furnaces have a multi-stage or modulating burner.
- Furnaces must have an electronically commutated motor (ECM). An ECM is sometimes referred to as a variable speed, constant-airflow, constant-torque, electronically efficient (EEM), or X-13 motor. A permanent split capacitor motor (PSC), single- or multi-speed, does not qualify. A Pre-Qualified Equipment List is available at focusonenergy.com/myhome.

95% AFUE Natural Gas Furnace - \$350 Tier 2 Incentive only:

- Furnace must have an AFUE of 95 percent or greater.
- Must be customer of a participating natural gas utility.
- Electric, propane, and oil-fired furnaces are not eligible.

HIGH EFFICIENCY FURNACE AND AIR CONDITIONER COMBINATION

95% AFUE Natural Gas Furnace with ECM and 16 SEER Central Air Conditioner - \$250 Tier 1 Incentive; \$750 Tier 2 Incentive:

- Qualified furnace and air conditioner must be installed at the same time and may not be combined with the incentives listed above.
- If installing a qualified furnace and air conditioner and the condenser cannot be set due to weather:
 - The evaporator coil must be installed at the same time as the furnace.
 - The invoice must include the condenser model and state when the condenser will be installed.
 - The application must be submitted within 60 days of the furnace and evaporator coil installation.
- Furnaces must be a sealed combustion unit.
- Furnaces must be the primary heating source for the home's living space.
- Furnace must have an AFUE of 95 percent or greater.
- Only natural gas furnaces are eligible.
- Furnaces must have a multi-stage or modulating burner.
- Furnaces must have an ECM. An ECM is sometimes referred to as a variable speed, constant-airflow, constant-torque, EEM, or X-13 motor. A PSC motor, single- or multi-speed, does not qualify. A Pre-Qualified Equipment List is available at focusonenergy.com/myhome.
- Seasonal energy efficiency ratio (SEER) for the combination of furnace, outdoor unit (condenser), and indoor coil must be 16 or greater.
- SEER is determined by the Air Conditioning, Heating, and Refrigeration Institute (AHRI) database. An AHRI number for the system is required and can be found at ahridirectory.org.
- An air source heat pump cannot be used to meet the air conditioner portion of this incentive.
- Must be customer of a participating electric utility and a participating natural gas utility and use natural gas for home heating.
- Chimney liners must be installed where a high-efficiency gas furnace replaces an atmospherically-drafted furnace and only a water heater remains vented through the chimney. The interior opening left by the removed furnace must be closed with a metal cap and sealed with caulk or mortar.

AIR SOURCE HEAT PUMP

Air Source Heat Pump 16+ SEER - \$300 Incentive:

- Air Source Heat Pump with a minimum of 16 SEER and a minimum of 8.4 heating seasonal performance factor (HSPF).
- Coil and condenser must be purchased and installed at the same time.
- SEER based on AHRI database, found at ahridirectory.org, for furnace/air handler, coil, and condenser.
- Furnace must be LP, oil, or electric fired (natural gas furnaces are not eligible). Must be primary heating source for the home's living space.
- Ductless or mini-split systems cannot qualify for this incentive.
- Cannot combine with Focus on Energy furnace or ECM replacement incentive.
- Must be customer of a participating electric utility.
- Limited to customers who do not have access to natural gas.

ECM REPLACEMENT

ECM Replacement - \$100 Incentive:

- Must replace a PSC blower motor in an existing furnace or air handler.
- Existing furnace must have an AFUE of 90 percent or greater.
- Existing furnace must be a sealed combustion unit.
- Must be customer of a participating electric utility.
- Furnace must be the primary heating source for the home's living space.

HIGH EFFICIENCY BOILERS

Natural Gas Home Heating Boiler 95% AFUE - \$400 Tier 1 Incentive; \$550 Tier 2 Incentive:

- Boiler must have an AFUE of 95 percent or greater.
- Boilers must have an input capacity less than 300 MBH (Thousand British Thermal Units per hour).
- Boilers must have a modulating burner and include an integrated outdoor reset.
- Boilers must be a sealed combustion unit.
- Must be customer of participating natural gas utility and use natural gas for home heating. Boilers must be the primary heating source for the home's living space. Only natural gas boilers are eligible.
- Chimney liners must be installed where a high-efficiency gas boiler replaces an atmospherically-drafted boiler and only a water heater remains vented through the chimney. The interior opening left by the removed boiler must be closed with a metal cap and sealed with caulk or mortar.
- If boiler also heats domestic hot water, see indirect water heater or combination boiler.

INDIRECT WATER HEATERS

Indirect Water Heater for Home Heating Boiler - \$100 Tier 1 Incentive; \$150 Tier 2 Incentive:

- Must be installed on a boiler that qualifies for a natural gas home heating boiler incentive (which meets all requirements above).
- Installation of the water heater and boiler must occur at the same time, and the qualifying boiler must be included above in this application.
- The total cost (equipment, materials, external labor) must be separated from boiler and listed below.
- If water heater is integrated and has less than two gallons of storage, see combination boiler.

COMBINATION BOILER

Natural Gas Combination Boiler - \$500 Tier 1 Incentive; \$675 Tier 2 Incentive:

- Boiler must have an AFUE of 95 percent or greater.
- Boilers must have an input capacity less than 300 MBH (Thousand British Thermal Units per hours).
- Boilers must have modulating burner and include an integrated outdoor reset.
- Boilers must be a sealed combustion unit.
- Domestic hot water storage must be less than 2 gallons.
- Must be a customer of participating natural gas utility and use natural gas for home heating. Boilers must also be the primary heating and domestic water heating source for the home. Only natural gas boilers are eligible.
- Chimney liners must be installed where a high-efficiency gas boiler replaces an atmospherically-drafted boiler and only a water heater remains vented through the chimney. The interior opening left by the removed boiler must be closed with a metal cap and sealed with caulk or mortar.

SMART THERMOSTATS

Smart Thermostat - \$75 Incentive:

- Smart thermostat must be installed at the same time as a program-qualified furnace, boiler or air source heat pump.
- Eligible models must be selected from the Focus on Energy qualified product list at focusonenergy.com/smart.
 - Program-qualified smart thermostats must feature integrated occupancy-sensing capability, such as motion sensors and/or geofencing with setback.
- Smart thermostat must be installed to use with the home's primary heating source for the home's living space.
 - Homes heated by LP, oil, wood, or electric resistance are not eligible for the smart thermostat incentive.
 - Homes heated with a geothermal system are not eligible for the smart thermostat incentive.
- Smart thermostat must replace an existing thermostat that does not qualify for program incentives.
- The customer must establish the Wi-Fi connection for program-qualified smart thermostats.
- Limit one smart thermostat incentive per home heating system.

Your installation of a smart thermostat is only eligible for an incentive if:

- It is purchased new. Resale material or material that is leased, rebuilt, rented, received from insurance claims, received from a manufacturer warranty, or won as a prize does not qualify.

TERMS AND CONDITIONS

- Focus on Energy incentives are available to Wisconsin residential customers of participating utilities. Call 800.762.7077 or visit focusonenergy.com to verify eligibility.
- Offer is valid for equipment and products purchased and installed between January 1, 2016 and June 30, 2016.
- Only single family dwellings and multifamily dwellings with three or fewer units are eligible for incentives included in this application. Incentives may be available for other customer or property types. Please visit focusonenergy.com for more information.
- Incentives may not exceed the total purchase price of the energy efficient equipment. The only costs eligible for incentives are: materials; equipment; external labor.
- Allow approximately 8-10 weeks for your completed application to be processed. Incomplete applications cannot be processed. Failure to complete the application in full and provide the required supporting documentation will either delay the payment process or result in your application being denied. Receipt of an application does not guarantee payment of an incentive.
- The program is not responsible for items (i.e. applications, supporting documentation, incentive checks) lost or damaged in the mail.
- Focus on Energy will only pay one incentive for each piece of equipment. Incentives paid on this application cannot be claimed on another Focus on Energy application. Similarly, incentives can only be paid to one person or entity (i.e., either the resident or landlord, not both).
- All equipment installations are subject to verification inspection by the program to ensure the equipment is properly installed and operating. Participants must allow, if requested, the program or a program representative reasonable access to their home to verify the installed equipment.
- A current list of qualified products for most equipment is available at focusonenergy.com/myhome. If you have a question concerning one of the lists, please email homerewards@focusonenergy.com with "Equipment" in the subject line.

You are only eligible to participate in the program if you are:

- A current residential customer of a participating utility in Wisconsin at the time of equipment purchase and installation; or
- A landlord (who is not the utility account holder) who paid for the equipment installed in the residence of a current residential customer of a participating utility in Wisconsin at the time of equipment purchase and installation; and
- Installing qualifying energy efficient equipment in an existing residential dwelling. New construction does not qualify.

Your installation of high efficiency equipment is only eligible for an incentive if:

- It meets all equipment-specific, energy efficiency, and program requirements as outlined in this application.
- It is replacing existing equipment used for the same purposes. Equipment additions to a residential dwelling, which are not replacing existing equipment, do not qualify.
- It is purchased new. Resale material or material that is leased, rebuilt, rented, received from insurance claims, received from a manufacturer warranty, or won as a prize does not qualify. Equipment purchased with a home warranty is eligible as long as the incentive does not exceed the total purchase price of the energy efficient equipment less the home.
- Equipment is installed by a professional contractor with appropriate insurance, permits, and licenses. A valid Wisconsin State professional contractor's license or credential is required.
- Equipment is installed conforming to all applicable building, local, state and federal codes, standards, ordinances and regulations, and manufacturer specifications.
- Equipment is installed and operational prior to submittal of this application at the address listed on the application.
- It is installed in a property owned by the applicant, or the applicant has received permission from the property owner to install the equipment. If you do not own the property where this equipment is installed, as a residing tenant you are responsible for obtaining the owner's permission to install the equipment for which you are applying for an incentive. Submission of this application indicates that you have obtained this permission.

To be considered complete and eligible for incentives, all applications must:

- Be postmarked no later than 60 days after the installation date.
- Be signed by the purchaser (Utility Account Holder, Landlord, or Applicant signing on behalf of the Utility Account Holder).
- Include itemized contractor invoice(s) or proof of purchase receipt(s) containing:
 - Equipment make and model
 - Total installed cost (itemized by each equipment/product installed)
 - Total number of units installed
 - Purchase date and installation date (if purchased and installed on separate dates)
 - Professional contractor's business/company name, address, and phone number
 - Balance due of zero, paid in full stamp, or payment terms