

# SMART TUNE-UP BUNDLE INCENTIVE APPLICATION

**Complete this application to claim your incentive for a qualified tune-up and smart thermostat bundle before December 31, 2018.** Focus on Energy incentives are limited and are subject to change without notice. Incomplete applications will delay processing and receipt of an incentive. Visit [focusonenergy.com/terms](http://focusonenergy.com/terms) for program terms and conditions.

## Step 1: Confirm your eligibility

Verify with your Trade Ally that you are eligible for this incentive. Check that your ZIP code is on their eligible ZIP code list.

Verify that your installed thermostat is ENERGY STAR® certified.

## Step 2: Provide home reference data

This section is required.

Furnace age:		
<input type="checkbox"/> 0–10 years	<input type="checkbox"/> 11–20 years	<input type="checkbox"/> 21+ years
Age of home:		
<input type="checkbox"/> 1995 or after	<input type="checkbox"/> 1970–1994	<input type="checkbox"/> pre-1970
Estimated square footage:		
<input type="checkbox"/> 1,000 or less	<input type="checkbox"/> 1,001–3,000	<input type="checkbox"/> 3,001+
Do you experience any home comfort issues?		
Drafty room(s)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Room(s) too hot/too cold	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Large icicles	<input type="checkbox"/> Yes	<input type="checkbox"/> No
High electric bills	<input type="checkbox"/> Yes	<input type="checkbox"/> No
High gas bills	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Check if you do <b>not</b> want to receive information from Focus on Energy about these issues.		

## Step 3: Complete your application

Please fill out all fields unless otherwise directed, and make sure to sign your application. Incomplete or missing information will delay processing.

### WHAT YOU'LL NEED:

- A copy of your tune-up and thermostat installation invoice.

## Step 4: Submit paperwork

Submit the application within 60 days of the tune-up and thermostat installation along with supporting documentation to Focus on Energy at the address below. Please allow 8–10 weeks for processing and retain a copy for your records.

**Focus on Energy – Home Performance Program**  
**3113 W. Beltline Highway, Suite 100**  
**Madison, WI 53713**

**Email:** [homerewards@focusonenergy.com](mailto:homerewards@focusonenergy.com)

**Fax:** 888.627.0938

Questions? Please call: 855.339.8866

## 1 Utility Account Holder Information

Customer Name:		
Electric Utility Provider:	Electric Utility Account Number:	
Gas Utility Provider:	Gas Utility Account Number:	
Installation Address:		
City:	State: WI	ZIP:
Phone Number:	Email:	
This is a(n): <input type="checkbox"/> Existing Home/Business New Construction is not eligible.	Site has Central A/C or Air Source Heat Pump: <input type="checkbox"/> Yes <input type="checkbox"/> No	
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 _____	Heating System Type: <input type="checkbox"/> Furnace <input type="checkbox"/> Boiler <input type="checkbox"/> Air Source Heat Pump <input type="checkbox"/> Other _____	

## 2 Payment Information

### MAKE CHECK PAYABLE TO:

<input type="checkbox"/> Customer/Homeowner	<input type="checkbox"/> Trade Ally (Participating Contractor)
<input type="checkbox"/> Landlord Name: _____	
If "Trade Ally" box is checked, invoice must itemize instant rebate and customer acknowledges contractor will receive incentive check. If "Landlord" box is checked, Tax status and Tax ID number must be provided.	

Send Check for the Attention of: (Complete if needed for mailing)

Mailing Address:		
City:	State:	ZIP:
Business Classification of Customer: (Only if Landlord is Payee) <input type="checkbox"/> LLC <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship/Individual <input type="checkbox"/> Other: _____	Tax ID Number (Only if Landlord is Payee): FEIN ____-____-_____ SSN ____-____-_____ _____	

## 3 Trade Ally/Contractor Information

Company Business Name:	Phone Number:	
City:	State:	ZIP:

## 4 Signature

I HAVE READ AND UNDERSTAND THE TERMS AND CONDITIONS AVAILABLE AT FOCUSONENERGY.COM/TERMS. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT IN THIS APPLICATION AND THE PRODUCT(S) AND/OR EQUIPMENT FOR WHICH I AM REQUESTING AN INCENTIVE MEETS THE REQUIREMENTS IN THIS APPLICATION. I UNDERSTAND THAT FOCUS ON ENERGY DOES NOT WARRANT OR GUARANTEE THE DELIVERY OF SERVICES OF MY CHOSEN TRADE ALLY.

I certify that my ZIP code has been verified as on the eligible ZIP code list.

Customer Signature:	Date:
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### How did you hear about this program?

- |   |  |                                       |                                  |
|---|--|---------------------------------------|----------------------------------|
| <input type="checkbox"/> Community Association/Agency   | <input type="checkbox"/> Contractor/Trade Ally | <input type="checkbox"/> Direct Mail  |                                  |
| <input type="checkbox"/> Friend/Neighbor                | <input type="checkbox"/> Internet              | <input type="checkbox"/> Social Media | <input type="checkbox"/> Utility |
| <input type="checkbox"/> Other (please describe): _____ |  |                                       |                                  |

# Tune-up and Smart Thermostat Installation Requirements

## GENERAL:

- Limited offering available only to customers in specific ZIP codes. Confirm with your Trade Ally that you are in an eligible ZIP code.
- Must be a customer of a participating natural gas utility.
- Must be a customer of a participating electric utility.
- Incentive may not exceed total combined cost of tune-up and smart thermostat.
- Incentives are available for existing equipment only. New heating and cooling installations with a smart thermostat are not eligible for this offer.
- Standalone air conditioning tune-ups are not eligible.

## SMART THERMOSTATS:

- Must be purchased and installed by a qualified heating and cooling contractor.
- Must be an ENERGY STAR certified thermostat to be eligible.  
See [energystar.gov/productfinder/product/certified-connected-thermostats/results](http://energystar.gov/productfinder/product/certified-connected-thermostats/results) for complete list.
- Limit one smart thermostat incentive per home heating system, and only one incentive per thermostat.
- 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, purchased through other Focus on Energy programs, or won as a prize does not qualify.

# Tune-up and Installation Information

## TUNE-UP – PLEASE INDICATE WHICH TUNE-UP WAS COMPLETED AND ENSURE ALL ASSOCIATED CHECKS WERE DONE

<input type="checkbox"/> Furnace Tune-up completed	<input type="checkbox"/> Furnace and A/C Tune-up completed	<input type="checkbox"/> Boiler Tune-up completed
<ul style="list-style-type: none"> <li>• Check for gas leaks and CO</li> <li>• Inspect and tune: burner, ignition system, heat exchanger, exhaust/flue, control box and wiring</li> <li>• Maintain blower assembly</li> <li>• Check and change/clean air filter per manufacturer's recommendations</li> <li>• Visually inspect ductwork for blockages or leaks</li> <li>• Measure temperature rise</li> <li>• Check line loads</li> <li>• Verify thermostat operation in accordance with manufacturer recommendations</li> <li>• Check condensate line (if applicable)</li> <li>• Adjust furnace until CO test results within standard industry limit</li> <li>• Confirm draft (if applicable)</li> <li>• Confirm proper operation of the system</li> </ul>	<p>Furnace Tune-up</p> <ul style="list-style-type: none"> <li>• Check for gas leaks and CO</li> <li>• Inspect and tune: burner, ignition system, heat exchanger, exhaust/flue, control box and wiring</li> <li>• Maintain blower assembly</li> <li>• Check and change/clean air filter per manufacturer's recommendations</li> <li>• Visually inspect ductwork for blockages or leaks</li> <li>• Measure temperature rise</li> <li>• Check line loads</li> <li>• Verify thermostat operation in accordance with manufacturer recommendations</li> <li>• Check condensate line (if applicable)</li> <li>• Adjust furnace until CO test results within standard industry limit</li> <li>• Confirm draft (if applicable)</li> <li>• Confirm proper operation of the system</li> </ul> <p>Air Conditioner Tune-up</p> <ul style="list-style-type: none"> <li>• Check line loads</li> <li>• Wash condensing coil</li> <li>• Measure temperature drop</li> <li>• Maintain condenser fan and motor</li> <li>• Verify thermostat operation in accordance with manufacturer recommendations</li> <li>• Confirm proper air flow</li> <li>• Confirm proper operation of the system</li> </ul>	<ul style="list-style-type: none"> <li>• Check for gas leaks and CO</li> <li>• Inspect and tune: burner, ignition system, heat exchanger, exhaust/flue, control box and wiring</li> <li>• Visually inspect piping</li> <li>• Maintain circulator pump assembly(ies)</li> <li>• Measure temperature rise</li> <li>• Verify thermostat operation in accordance with manufacturer recommendations</li> <li>• Check condensate line (if applicable)</li> <li>• Adjust boiler until CO test results within standard industry limit</li> <li>• Confirm draft (if applicable)</li> <li>• Confirm proper operation of the system</li> </ul>

## SMART THERMOSTAT

Installed Date	Brand	Model Number	Serial Number or MAC ID	Total Installed Cost	Incentive
				\$	Bundled Incentive
<b>TOTAL INCENTIVE AMOUNT</b>					<b>\$250</b>