

## Residential Geothermal Heat Pump

PLEASE complete ALL sections and sign form to ensure proper and prompt payment of rebate.

### Member Address Information (person receiving rebate) Check if wind or solar generation is installed.

First Name	Last Name	Account Number	Phone
Address		City	State Zip Email Address

### Equipment Location Information Check if same address as above:

First Name	Last Name	Account Number	Phone
Address		City	State Zip Email Address

Check the ACCOUNT TYPE where equipment is located:

<input type="radio"/> Residence Only	<input type="radio"/> Farm Only	<input type="radio"/> Apart.Bldg/Unit
<input type="radio"/> Resid./Farm	<input type="radio"/> Business Only	
<input type="radio"/> Resid./Business	<input type="radio"/> Commercial/Indust.	

Check if you are a builder/developer and building is not yet owned by live-in residents: "Spec Building"

### Installation and Equipment Information

<p>YEAR HOUSE BUILT (approx.) <input style="width: 100px;" type="text"/></p> <p>CONDITIONED AREA (sq. ft.) <input style="width: 100px;" type="text"/></p> <p>HEAT PUMP EQUIPMENT:</p> <p><input type="radio"/> Geothermal Unit - New Closed Loop</p> <p><input type="radio"/> Geothermal Unit - New Open Loop</p> <p><input type="radio"/> Geothermal Unit - Existing Closed Loop</p> <p><input type="radio"/> Geothermal Unit - Existing Open Loop</p> <p>Check if Hydronic Unit (In-floor heat) <input type="checkbox"/></p> <p>Check if Desuperheater Installed <input type="checkbox"/></p> <p>DATE INSTALLED <input style="width: 100px;" type="text"/></p> <p>TYPE OF SYSTEM REPLACED:</p> <p><input type="radio"/> New Construction   <input type="radio"/> Natural Gas   <input type="radio"/> Air Source Heat Pump</p> <p><input type="radio"/> Added Capacity   <input type="radio"/> Oil   <input type="radio"/> Geothermal Heat Pump</p> <p><input type="radio"/> Propane   <input type="radio"/> Wood   <input type="radio"/> Electric Resistance</p> <p>AGE OF SYSTEM REPLACED? (yrs) <input style="width: 100px;" type="text"/></p> <p>INSTALLER: <input type="radio"/> Owner   <input type="radio"/> Utility   <input type="radio"/> Contractor</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td colspan="3">Business Name (retailer or installing contractor)</td></tr> <tr><td colspan="3">Address</td></tr> <tr><td>City</td><td>State</td><td>Zip Code</td></tr> </table> <p><b>HEAT PLUS RATE</b> Use Electric Heating Equipment Rate form (R1) for existing equipment rate change.</p> <p><input type="checkbox"/> Check if Heat Plus Rate is being applied for the first time.</p> <p>HEAT RATE ACCOUNT # <input style="width: 100px;" type="text"/> (if different than shown for equipment location above)</p>	Business Name (retailer or installing contractor)			Address			City	State	Zip Code	<p><b>HEATING EQUIPMENT SPECIFICATIONS</b></p> <p>AHRI REFERENCE NUMBER <input style="width: 100px;" type="text"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Manufacturer/Brand</td></tr> <tr><td>Model Number</td></tr> <tr><td>Serial Number</td></tr> </table> <p>COOLING CAPACITY (tons) <input style="width: 100px;" type="text"/> <i>Round to nearest 0.5 ton</i></p> <p>AUXILIARY RESISTANCE (kW) <input style="width: 100px;" type="text"/></p> <p>EER (cooling efficiency rating) <input style="width: 100px;" type="text"/></p> <p>C.O.P. (heating efficiency rating) <input style="width: 100px;" type="text"/></p> <p>ENERGY STAR QUALIFIED <input type="checkbox"/> YES</p> <p>SECONDARY HEATING SYSTEM:</p> <p><input type="radio"/> NONE   <input type="radio"/> Oil   <input type="radio"/> Resistance</p> <p><input type="radio"/> Natural Gas   <input type="radio"/> Wood</p> <p><input type="radio"/> Propane   <input type="radio"/> Other</p> <p>INSTALLED SYSTEM COST <input style="width: 100px;" type="text"/></p> <div style="background-color: #d3d3d3; text-align: center; padding: 5px;"><b>Incentive Summary</b></div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Please do not use shaded areas</td> <td style="width: 25%; text-align: center;">Geothermal Equipment</td> <td style="width: 25%;"></td> </tr> <tr> <td style="text-align: center;">Attach copy of sales invoice</td> <td style="text-align: center;">Heat Plus</td> <td></td> </tr> <tr> <td></td> <td style="text-align: center;"><b>REBATE</b></td> <td></td> </tr> </table>	Manufacturer/Brand	Model Number	Serial Number	Please do not use shaded areas	Geothermal Equipment		Attach copy of sales invoice	Heat Plus			<b>REBATE</b>	
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### Member Agreement (Must Sign)

I verify that the above described equipment was installed on the date and location specified. I agree to all program requirements provided (either separately or on back of this form) and that my electric Cooperative reserves the right to inspect all equipment and verify information before issuing a rebate.

Member Signature	Date
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<b>Office Use Only:</b>	Cooperative ID	Notes:	Authorized Amount
	Employee Name		

## Terms and Conditions - Geothermal Heat Pump Equipment and Rate Incentives

**Program Offer:** The Program covers products purchased and/or services rendered on or after **January 1, 2023**.

### Geothermal Heat Pump Equipment Requirements

1. Equipment must be listed in the AHRI Certification Directory for geothermal equipment. This information can be verified online for a given model number at [www.ahridirectory.org](http://www.ahridirectory.org). Data (including capacity) must be obtained from the appropriate section as follows:
  - WLHP Ratings required for Water Source equipment rebate.
  - GWHP Ratings required for Open Loop geothermal equipment rebate.
  - GLHP Ratings required for Closed Loop geothermal equipment rebate.
2. Size of unit used to determine rebate is based on the cooling capacity listed in the appropriate section of the AHRI Directory.
3. Closed or open loop heat exchangers must be designed to maintain water temperatures within AHRI performance test parameters for the type of equipment and rebate being considered.
4. Units rated only as water loop heat pump (WLHP) equipment must use water that is temperature controlled by a system such as a boiler/cooling tower.
5. Hydronic units may be used for domestic water heating or pool heating. These will NOT qualify for special heat rate programs unless units also provide space heating.
6. Rebates will be paid per 1/2-ton increment with the capacity determined using the appropriate AHRI rating.
7. "Pump and Dump" systems are not eligible.

**NOTE:** Installing contractors should provide Members with the information necessary to complete the application for this program. Prior to installation, the contractor should be made aware of program requirements and you should contact the Cooperative to confirm that the system will qualify for an incentive.

Geothermal Heat Pump Incentives	
Geothermal Heat Pump with closed loop	\$450 /Ton
Geothermal Heat Pump with open loop	\$300 / Ton
Geothermal UNIT ONLY (existing closed/open loop)	\$150 / Ton
Heat Plus Rate/Meter ( <b>Only available if Member Supplies metering equipment</b> )	\$100/ Home or \$ 50/ apt. or shared bldg

### Heat Plus Rate Program Requirements

1. The primary heating system must be electric and metered separately.
2. The primary electric heating source must operate first, with any backup system operating only when the primary system is unable to satisfy the indoor thermostat setting.
3. An electric water heater (storage, heat pump or supplemental solar) must be installed and provide 100% of the domestic water heating for the home.
4. The space heated by the primary electric system must be an area of 400 square feet or more.
5. The rebate for the Heat Plus rate is only available to the building owner. The rate is applicable to all ratepayers (including renters) with eligible heating systems.

### Qualifying Heat Plus Facilities

The following facilities can qualify for the Heat Plus rate:

- Single family residential dwellings and/or their outbuildings.
- Residential apartments and multi-family buildings (e.g. nursing homes and assisted living complexes). *May not apply to large complexes with individual meters.*
- Buildings or facilities that 1.) are served by one or more transformers with a combined rate capacity of 75 kVA or less, or 2.) maintain an actual combined peak of 75 kW or less.
- Separately metered building spaces that maintain an actual combined peak of 75 kW or less.

Note: The Heat Plus rate is not to be applied to periodic heating applications or to heating during peak winter conditions only. A system where the building is totally unheated during unoccupied times is unacceptable.

The Cooperative reserves the right to suspend the rate and remove metering equipment owned by the Cooperative if the Member is no longer using the equipment on a regular basis or is in violation of any program requirement.

### General Terms and Conditions

Rebates shall be pro-rated based on the percent of power supplied by the Cooperative if the member has distributed generation.

**Application Information:** Missing or incorrect information on the application may delay processing and delivery of the rebate. An invoice is required and should include specific product information, including the brand, model, serial number and date of purchase of the energy efficient measures. Other information including manufacturer's equipment performance sheets may be required upon request.

The Cooperative reserves the right to verify sales transactions and to have reasonable access to the Member's facility to inspect pre-existing equipment (if applicable) and energy efficient measures installed under this program.

**Warranty Information:** The Cooperative makes no warranties, expressed or implied, with respect to equipment operation, material, workmanship or manufacturing. The Cooperative does not guarantee that a certain level of energy or cost savings will result from the use of products covered by this program.

**Limitation of Liability:** The Cooperative's liability in connection with this program is limited to paying the rebate specified when all terms and conditions have been satisfied. Under no circumstances shall the Cooperative be liable for any consequential or incidental damages or tax liability resulting from participation in this program.

**Participant Certification:** Participating Member certifies that he/she purchased and installed the equipment listed on their application at the defined location served by the Cooperative. The Member agrees that all information provided is true and that he/she has conformed to all program requirements. If the equipment and application does not comply with the Cooperative's rules and qualifications, the rebate amount may be denied or adjusted.

**Program Changes/Termination:** The Cooperative reserves the right to extend, modify (including incentive levels) or terminate this Program at any time without prior or further notice. The Member is responsible for checking with the Cooperative to determine whether the program has been changed or is still in effect.

**Members must apply for rebates within six (6) months of the purchase date (as shown on the Member's invoice) and are subject to the current year program offer if received after January 31st.** Past eligibility, however, does not guarantee that equipment will meet criteria for current programs in effect.