

Air Source and Geothermal Heat Pump Application

Applications will only be processed if fully completed and signed. It is the homeowner's responsibility to ensure the contractor completes the contractor checklist. **MEAN Preauthorization is required prior to installation or no incentive will be paid.** Email form (with Sections 1-3 below completed) along with a completed IRS Form W-9 for the Homeowner to Nicole Kubik at nkubik@nmppenergy.org to obtain MEAN Preauthorization signature.

1. **Homeowner Name:** _____ **Electric Utility:** _____
Mailing Address, City, State, Zip: _____ Phone #: _____
Installation Address, City, State & Zip: _____ Utility Account #: _____
2. **Name of HVAC Contractor:** _____ **Tax ID #:** _____
Business Address, City, State, Zip: _____ Phone #: _____
3. **Equipment:** Mfr.: _____ Heat Pump Model #: _____ Furnace or Coil ID #: _____
Tons: _____ Backup Heat: Electric _____ (kW), or Fossil Fuel _____ (Btuh)
Type of Installation: ☐ New Construction ☐ A/C to Heat Pump ☐ Existing Heat Pump to New Heat Pump

TYPE OF HEAT PUMP	INCENTIVE CRITERIA (SEER RATING)	INCENTIVE CRITERIA (SEER2 RATING)	INCENTIVE AMOUNT
☐ Ductless Mini split	16+ SEER, 12.5 EER, 8.5 HSPF	16+ SEER2, 12.5 EER2, 7.7 HSPF2	\$400
☐ Ductless Mini split	Variable Capacity*		\$600
☐ Ductless Mini split (multi heads, 3 ton or greater)	Variable Capacity*		\$1,200
☐ Air Source	16-16.9 SEER, 12.5 EER, 8.5 HSPF	15.2-16 SEER2, 11.9 EER2, 7.5 HSPF2	\$400
☐ Air Source	17-18.9 SEER, 12.5 EER, 8.5 HSPF	16.1-18 SEER2, 11.9 EER2, 7.5 HSPF2	\$750
☐ Air Source	19+ SEER, 12.5 EER, 8.5 HSPF	18.1+ SEER2, 11.9 EER2, 7.5 HSPF2	\$1,000
☐ Air Source	Variable Capacity*		\$1,000
☐ Geothermal – 1 or 2 stages	Any EER	Any EER	\$2,400
☐ Geothermal variable capacity	35+ EER, 5.0 COP (as shown in GLHP partial load column of AHRI or Energy Star Certificate)		\$3,000

* Provide documentation that shows manufacturer, model number and that states the equipment is "inverter driven"

4. **MEAN Preauthorization (must be completed prior to installation):**

Signature

Date

5. **Contractor Checklist:**

- ☐ Manufacturer's required start-up testing completed ☐ Ductwork reviewed for issues & discussed w/homeowner
☐ Operate heat pump a minimum of 10 minutes (heat pump mode only) and record the following for each indoor unit:

Air Source: (Measure a minimum of 2 indoor units for multi head systems)

Heating ☐ or Cooling ☐; Supply Air Temp: _____, _____ °F Return Air Temp: _____, _____ °F

Water to Air: (Measure pressure difference (DP) to determine flow rate (gpm) from manufacturer's data)

Heating ☐ or Cooling ☐; Supply Air Temp: _____ °F Return Air Temp: _____ °F

Entering Source Temp= _____ °F Leaving Source Temp= _____ °F Flow Source Rate= _____ gpm

Water to Water: (Measure pressure difference (DP) to determine flow rate (gpm) from manufacturer's data)

Entering Source Temp= _____ °F Leaving Source Temp= _____ °F Flow Source Rate= _____ gpm

Entering Load Temp= _____ °F Leaving Load Temp= _____ °F Load Flow Rate= _____ gpm

6. ☐ **AHRI Certificate is attached** (required for all installations) AHRI #: _____

7. **I acknowledge that this installation is in compliance with program guidelines.**

Homeowner: _____

Print Name

Signature

Date

Contractor: _____

Print Name

Signature

Date

8. **Electric Utility Installation Verification** (please verify approval of incentive payment):

City Authorized Representative: _____

Print Name

Signature

Date

MEAN HIGH EFFICIENCY HEAT PUMP PROGRAM -

APPLICATION PROCESS

- Review program description, application, and terms & conditions.
- Retain a licensed contractor and complete the Sections 1-4 of the Application on the front of this page (including obtaining a signature for project preauthorization from MEAN staff) prior to installation.
- Once project has been authorized by MEAN, have licensed contractor perform installation and required checklist items required on the Application.
- Finish the application process with contractor's and homeowner's signatures and submit to your local electric utility for approval along with proof of purchase of materials (must be new equipment).
- Pending city's approval, incentive payment will be processed within 4-6 weeks and sent to the homeowner.
- MEAN is not responsible for, nor is MEAN qualified, to determine the tax implication of each transaction. Therefore, MEAN's advisors recommend that MEAN issue a 1099NEC for all incentive payments over the current threshold set by the IRS for filing Form 1099. The tax implication of the transaction can then be determined by the recipient of the 1099 and their tax accountant. We are required to but including it in your income is specific to your situation.

TERMS AND CONDITIONS

Limits and Exclusions:

- Total incentive payment limited to \$3,000 per residential customer (homeowner) per MEAN Fiscal Year (April 1 - March 31).
- Equipment must be purchased and installed before incentive payment is issued.
- Exceptions will be handled on a case-by case basis.

Incentive Payment Requirements:

- No incentive payment will be provided without prior MEAN preauthorization on the Heat Pump Program application.
- No incentive payment will be provided without the submittal of fully completed Heat Pump Program application signed by the owner, installing contractor and electric utility authorized representative after installation is completed.
- Homeowner must complete and submit IRS Form W-9.
- Installation must occur and application materials must be submitted within 90 days following preauthorization confirmation.
- Please allow 4-6 weeks to receive incentive payment. Submitting an application with incomplete or missing information may delay processing of the payment.
- Incentive payment will be remitted to the homeowner listed on the application and W-9 Form.

General Terms & Conditions:

- Incentive payments will be disbursed on a first come, first serve basis and are subject to eligibility and availability of funds. Incentive payment program subject to change or terminate without notice.
- Incentive payment only applies to equipment/services purchased/rendered after June 1, 2021.
- MEAN reserves the right to verify all sales transactions and inspect all projects prior to and after installation.

- Equipment must be new, installed and operated at the homeowner's premise and located in the MEAN Member electric service territory.
- Falsifying any information will lead to cancellation of this and further incentive payment applications and a claim by MEAN for the return of any incentive payment.
- MEAN does not endorse nor warrant any particular manufacturers, products, or system designs in promoting this program. Equivalent products must be pre-approved by MEAN before incentive payment will be made.
- The homeowner/contractor agrees that each measure complies with all federal, state, and local safety, building, electrical, and environmental codes. All products must be UL-listed and installed per manufacturer's instructions.
- The homeowner/contractor is responsible for the proper disposal and/or recycling of any waste generated as a result of this project.
- MEAN reserves the right to publicize your participation in this program unless otherwise notified in writing.
- MEAN does not guarantee equipment or energy savings.

Heat Pump Requirements:

- All heat pumps must be permanently installed in a residential single-family dwelling and primarily used for space heating. A mobile home must be on a permanent foundation.
- Qualifying equipment is AHRI listed with an indoor and outdoor unit combination that meets the minimum requirement of 16.0 Seasonal Energy Efficiency Ratio (SEER), 12.5 Energy Efficiency Ratio (EER), and 8.5 Heating Seasonal Performance Factor (HSPF) or the equivalent SEER2 ratings as shown on the application form. This is the minimum efficiency level for the incentive.
- The incentive payment will be paid to the owner of a residence after the equipment is installed and operating. The application form must then be signed by both the contractor and the homeowner. The application will then be submitted to the homeowner's electric utility for verification/signature.
- The incentive payment to the homeowner will come directly from MEAN for qualifying systems that have been verified by the local electric utility.
- Multifamily structures that are separately metered will be considered residential, thus requiring separate applications.
- In those cases where combinations of two or more heat pumps are installed in the same house, both or all are eligible for the full incentive amount.
- To be eligible for an incentive, a cottage/cabin must be heated during the winter months of October through May.
- If electricity is the primary source of heat for a residence, the use of solar panels, wood stove or fireplace will not affect the eligibility for an incentive payment.
- Additions and supplemental systems are not eligible for incentive payments unless they are large enough for their own dedicated heating and cooling system.
- Package Terminal Heat Pumps (PTHPs) are not eligible.

Contact Nicole Kubik with any questions at
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