



COMMERCIAL GROUND SOURCE (GEOTHERMAL) HEAT PUMP HEATING AND COOLING SYSTEM INCENTIVE APPLICATION FOR EXISTING BUILDINGS

OFFICE USE ONLY
PROJECT ID: _____

THIS INCENTIVE APPLICATION FORM IS VALID FROM JULY 1, 2009 TO DECEMBER 31, 2009. INCOMPLETE APPLICATIONS WILL BE RETURNED.
Focus incentives are subject to change. Please visit focusonenergy.com/incentives/business to ensure you are using the most current form.

SECTION 1: CUSTOMER LEGAL INFORMATION

Company Legal Name	FEIN (Federal Tax ID #) of customer (Must be 9 digits) _____		
Mailing Address	City	State	ZIP Code
Business Classification of Customer (Check ONE): <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor/Individual <input type="checkbox"/> LLC <input type="checkbox"/> Other: _____			

SECTION 2: PAYMENT INFORMATION

Make Incentive Check Payable to (Check ONE and complete information below):
 Company Business Owner's Legal Name (Only if Sole Proprietor) Market Provider (complete Section 4)

Attention to	Social Sec. # of Business Owner (only if Sole Proprietor AND no Federal Tax ID) _____
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SECTION 3: JOB SITE INFORMATION (where equipment was installed or service performed)

Job Site Name		Project Contact Name	
Job Site Street Address (physical location)		Project Contact Telephone	
City	State WI	ZIP Code	Project Contact Email
Electricity Provider at Job Site	Natural Gas Provider at Job Site	Installation/Service Date	

Type of business where equipment was installed or service performed (Check ONE):

<input type="checkbox"/> Office	<input type="checkbox"/> Food Processing	<input type="checkbox"/> Educational Facility	<input type="checkbox"/> Dairy & Livestock	<input type="checkbox"/> Warehouse
<input type="checkbox"/> Retail	<input type="checkbox"/> Pulp & Paper	<input type="checkbox"/> Government Facility	<input type="checkbox"/> Horticulture & Crops	<input type="checkbox"/> Health Care Facility (Inpatient)
<input type="checkbox"/> Restaurant	<input type="checkbox"/> Plastics	<input type="checkbox"/> Place of Worship (no School)	<input type="checkbox"/> Health Care Facility (Outpatient)	
<input type="checkbox"/> Grocery	<input type="checkbox"/> Metal Casting	<input type="checkbox"/> Place of Worship w/ School (Specify Grades: _____)	<input type="checkbox"/> Multi-Family Building _____ # Bldgs, _____ Total # Units	
<input type="checkbox"/> Lodging	<input type="checkbox"/> Other Manufacturing (Specify: _____)	<input type="checkbox"/> Other (Specify: _____)		

SECTION 4: MARKET PROVIDER INFORMATION (equipment provider/installer or service provider) **Note:** In order to pay Market Provider, invoice must have "Focus on Energy" incentive clearly indicated and deducted from customer's amount due and Market Provider must provide Federal Tax ID # or Social Security # below.

Market Provider Name	FEIN or Social Security # of Market Provider (if receiving payment) _____		
Market Provider Street Address	City	State	ZIP Code
Market Provider Contact Name	Contact Telephone	Contact Email	
Business Classification of Market Provider (Check ONE): <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor/Individual <input type="checkbox"/> LLC <input type="checkbox"/> Other: _____			

SECTION 5: CUSTOMER SIGNATURE

Certification: The following certifications are required in order for this form to substitute for the IRS form W-9:

- The number shown on this form is the correct taxpayer identification number.
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest or dividends or (c) the IRS has notified me that I am no longer subject to backup withholding.
- I am a U.S. citizen (includes a U.S. resident alien).

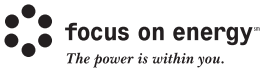
The undersigned agrees that the stated energy efficient measure(s) was (were) installed at the job site address listed above as part of the Focus on Energy Program. I have read and agree to the Terms & Conditions within this application. To the best of my knowledge, the statements made on this application are correct, and I have submitted the appropriate supporting documentation to receive an incentive. **Itemized Invoice Attached**

Customer Signature	Customer Name (Print)	Date
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FORM SUBMITTAL: Return signed, completed form and ITEMIZED invoice within 30 calendar days of installation to:

Mail: Focus on Energy, Business Programs Incentives, 431 Charmany Drive, Madison, WI 53719.

Email: Applications and invoices can be scanned and emailed to BPforms@weccusa.org.



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New closed loop heat exchanger system with one or more heat pumps, ≤75 tons combined capacity:

What type of heating system is this replacing? Natural gas furnace Natural gas boiler Electric furnace Electric baseboard
 Other _____

New Closed Loop System	Number of Heat Pumps	Total Tons <small>(if multiple heat pumps, provide sum total cooling capacity in each efficiency category)</small>	Incentive Rate	Incentive Requested
EER 14.0 to 14.99 and COP 3.30+			\$125/ton	
EER 15.0 to 15.99 and COP 3.40+			\$150/ton	
EER 16.0+ and COP 3.50+			\$175/ton	
Equipment Installation Date or System Startup Date			TOTAL INCENTIVE REQUESTED	\$

Program Limitations and Requirements:

1. This application is for retrofit projects for existing buildings. For new construction ground source heat pump applications, please use the New Construction incentive application.
2. These incentives are available only to customers of participating electric and natural gas providers; customer must have both.
3. Residential applications do not qualify for this incentive.
4. Closed loop heat exchanger system includes vertical closed loop field, horizontal closed loop field, slinky closed loop field, and closed pond loop. No prescriptive incentive for open loop system equipment, water loop (boiler/chiller) systems, air source heat exchangers, or direct expansion (Dx) heat exchangers. Contact your Energy Advisor for potential custom incentives in these situations during the initial design stage, well before ordering equipment.
5. Replacement of existing heat pump equipment not included. Program is intended to promote the installation of new systems.
6. Combined system capacity is the summation of the cooling capacity of each heat pump. Both qualifying and non-qualifying heat pumps will be included in this sum.
7. For systems over 75 tons of combined capacity, contact your Energy Advisor for custom incentives prior to system design.
8. Ground source heat pumps supplying hydronic (hot water) heating systems qualify only if the associated ground-coupled heat exchanger is also used for cooling during the cooling season.
9. Units installed for purposes other than the conditioning of occupied building space do not qualify for this prescriptive program. Heat pumps intended solely for domestic hot water heating or pool heating do not qualify, and do not count as part of the 75 ton limit.
10. Heat pump EER and COP ratings will be the published values at standard conditions in accordance with ANSI / AHRI / ASHRAE ISO Standard 13256-1,2: 1998 (Ground Loop Heat Pump).
11. Paid invoice for the ground heat exchanger hardware and installation, heat pump units, and balance of system must be provided. Itemized listing of installed heat pumps, capacities, model numbers, and efficiencies will streamline incentive processing.

Provide the following information about your system designer and installer:

12. System designer or engineer must be a Certified GeoExchange Designer (CGD) or be a licensed professional engineer who has successfully completed an approved geothermal design course (example: UW EPD Design of Geothermal Systems).

Check appropriately: System designer is a CGD Designer is a non-CGD PE qualified in geothermal design

Designer Name and Company	Designer Address
Designer Email/Telephone	Indicate qualifications and submit supporting documentation

13. Loop heat exchanger contractor or installer must be an International Ground Source Heat Pump Association (IGSHPA) Certified Geothermal Installer or equivalent.

Installer Name and Company	Installer Address
Installer Email/Telephone	Installer IGSHPA certification number (or submit proof of qualification)

FORM SUBMITTAL: Return signed, completed form and ITEMIZED invoice within 30 calendar days of installation to:

Mail: Focus on Energy, Business Programs Incentives, 431 Charmany Drive, Madison, WI 53719.

Email: Applications and invoices can be scanned and emailed to BPforms@weccusa.org.

Questions: Call 800.762.7077 then #2 for Business Programs.

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INCENTIVE LIMIT

Purchase and install qualifying equipment and receive an energy efficiency incentive of up to \$25,000 per project. Incentives exceeding \$25,000 must receive written approval BEFORE project initiation or equipment purchase. There is a maximum limit of \$500,000 per Corporate Tax ID per year for all Focus on Energy incentives (prescriptive and custom).

PRESCRIPTIVE INCENTIVES

Cash incentives are available for a variety of technologies. Check the Focus on Energy Web site at focusonenergy.com/incentives/business or call 800.762.7077, then press #2 for more information. Depending on your business tax classification, the IRS may require you to pay taxes on incentives totalling over \$600 per calendar year.

CUSTOM INCENTIVES

If your project does not fit the descriptions on this prescriptive incentive application form, it may qualify for a custom incentive which requires approval prior to project initiation and equipment purchase. Direct inquiries to 800.762.7077 then press #2 for Business Programs, or visit focusonenergy.com.

TERMS & CONDITIONS

- Incentive Offer:** This application covers products purchased and installed/service performed between July 1, 2009 and December 31, 2009. Applications must be **submitted within 30 calendar days of project installation** and no later than December 31, 2009. Please keep a copy for your records. Incomplete applications will be returned.
- Proof of Purchase:** This application must have complete information and be submitted with an invoice itemizing the **new equipment** purchased. The invoice must indicate date of purchase, the size, type, make, model, serial number, part number and/or equipment manufacturer (OEM) specification sheets. The signed application and invoices must be sent to Focus on Energy, Business Programs Incentives, 431 Charmany Drive, Madison, WI 53719.
- Compliance:**
 - All projects are expected to comply with federal, state and local codes.
 - All equipment must be new (with the exception of surveys, audits and service buydowns). Used or rebuilt equipment is not eligible for incentives. Existing equipment must be removed.
 - Equipment must meet specification requirements and be purchased and operating prior to submitting an incentive application form.
 - Only one incentive will be granted for each project. Incentives granted to contractors, distributors or other market providers cannot also be claimed by end-use customers.
- Payment:** Once completed paperwork is submitted, incentive payments are made within 6–8 weeks. Incomplete applications will be returned.
- Inspection:** Program staff may conduct an inspection of the facility to survey the installed projects.
- Publicity:** Focus on Energy reserves the right to publicize your participation in this program, unless you specifically request otherwise.
- Program Discretion:** Incentives are available on a first-come, first-served basis. This offer is subject to change or termination without notice at the discretion of the Focus on Energy Program.
- Focus Logo:** Customers or market providers may not use the Focus on Energy name or logo in any marketing, advertising or promotional materials without prior written permission.
- Disclaimers:** Focus on Energy
 - Does not endorse any particular market provider, manufacturer, product, labor or system design by offering this program;
 - Will not be responsible for any tax liability imposed on the customer as a result of the payment of incentives;
 - Does not expressly or implicitly warrant the performance of installed equipment or contractor's quality of work (contact your contractor for detailed warranties);
 - Is not responsible for the proper disposal/recycling of any waste generated as a result of this project; and
 - Is not liable for any damage caused by the installation of the equipment or for any damage caused by the malfunction of the installed equipment.
- Verification:** Any customer receiving an incentive check may be contacted by an evaluator to verify service/equipment installation or be asked to complete a customer survey.

UTILITY ELIGIBILITY

Incentives for specific technologies are offered by Focus on Energy to business customers including commercial, industrial, state, federal and local governments, agricultural, and schools/institutions with locations in Wisconsin. Customers of a participating electric provider are eligible for electric technology incentives only. Customers of natural gas providers are eligible for gas savings technology incentives only. Customers who have both a participating electric provider and a participating natural gas provider could qualify for all incentives. To determine eligibility, visit the Focus on Energy Web site at focusonenergy.com/utilities.

Focus on Energy works with eligible Wisconsin residents and businesses to install cost effective energy efficiency and renewable energy projects. Focus information, resources and financial incentives help to implement projects that otherwise would not get completed, or to complete projects sooner than scheduled. Its efforts help Wisconsin residents and businesses manage rising energy costs, promote in-state economic development, protect our environment and control the state's growing demand for electricity and natural gas.

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