

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, 2010 to December 31, 2010. New application forms will be available beginning January 1, 2011.
Focus incentives are subject to change. Please visit focusenergy.com/incentives/business to ensure you are using the most current form.

SECTION 1: CUSTOMER LEGAL INFORMATION (as shown on your income tax return)

Company Legal Name		Tax Identification Number—complete only one (must be 9 digits) FEIN #: _____ - _____ - _____ OR SS #: _____ - _____ - _____			
Legal Mailing Address		City	State	ZIP Code	
Business Classification of Customer (Check ONE. Required for all businesses, including non-profits) <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor/Individual <input type="checkbox"/> LLC <input type="checkbox"/> Other: _____					Owner Name (Corporations Excluded)

SECTION 2: PAYMENT INFORMATION

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

Mail check to: <input type="checkbox"/> Company Legal Address <input type="checkbox"/> Job Site Address <input type="checkbox"/> Alternate Address (complete below)			Attention to:		
Alternate Pay Address		City	State	ZIP Code	

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 Email			
City	State WI	ZIP Code	Project Contact Telephone		
Electricity Provider at Job Site		Natural Gas Provider at Job Site		Project Installation/Service Date	

What is the predominant use of the building space where equipment was installed or service was performed? (Check ONE)

<input type="checkbox"/> Office	<input type="checkbox"/> Lodging	<input type="checkbox"/> Health Care	<input type="checkbox"/> School (K-12)	<input type="checkbox"/> Place of Worship w/ School
<input type="checkbox"/> Retail	<input type="checkbox"/> Theater, Arena or Convention Assembly	<input type="checkbox"/> Agricultural	<input type="checkbox"/> College (secondary)	(Specify Grades: _____)
<input type="checkbox"/> Food Retail Sales	<input type="checkbox"/> Laundromat, Fitness, Entertainment or	<input type="checkbox"/> Industrial	<input type="checkbox"/> Dormitory	<input type="checkbox"/> Other (Specify: _____)
<input type="checkbox"/> Food/Beverage Service	Public Services	<input type="checkbox"/> Warehouse	<input type="checkbox"/> Place of Worship	

SECTION 4: MARKET PROVIDER INFORMATION (See Market Provider information section on the Program Information and Requirements page)

Market Provider Name		Tax Identification Number—complete only one if receiving payment (must be 9 digits) FEIN #: _____ - _____ - _____ OR SS #: _____ - _____ - _____			
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 (Read and Sign)

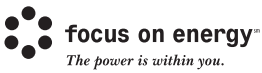
Certification: The following certifications are required in order for this form to substitute for the IRS form W9
Under penalties of perjury, I certify that:

- 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) completed or 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@focusenergy.com **Fax:** 608.237.2147
Questions: Call 800.762.7077 then #2 for Business Programs



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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 (LP gas/propane not eligible). The only exception is if the building is currently heated with electricity.
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 at ISO standard rating conditions. 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 cooling capacity, EER and COP ratings will be the published full load values at standard test conditions in accordance with ANSI / AHRI / ASHRAE ISO Standard 13256-1,2: 1998 (Ground Loop Heat Pump). (Entering water temperature from ground loop: 77°F cooling, 32°F heating)
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 must be submitted.

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)

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PROGRAM INFORMATION AND REQUIREMENTS

INCENTIVE LIMIT

Cash incentives are limited to \$250,000 per project and \$500,000 per customer in a calendar year for all Focus on Energy incentives (prescriptive and custom). Any project with an expected incentive exceeding \$25,000 must receive written approval BEFORE project initiation or equipment purchase.

PRESCRIPTIVE INCENTIVES

Cash incentives are available for a variety of technologies. Check the Focus on Energy Web site at focusenergy.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 totaling 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 ordering equipment or issuing purchase orders. Direct inquiries to 800.762.7077 then press #2 for Business Programs, or visit focusenergy.com.

TERMS & CONDITIONS

- Incentive Offer:** This application covers products purchased and installed/service performed between July 1, 2010 and December 31, 2010. Applications must be **submitted within 30 calendar days of project installation** and no later than December 31, 2010, unless an earlier date is specified by a Focus on Energy promotion. 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 product(s) and/or service(s) received. See the requirements section of this application for more details. Sample invoices are provided at focusenergy.com/sampleinvoice.
- Compliance:**
 - All projects are expected to comply with federal, state and local codes.
 - All equipment must be new. 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 8–10 weeks. Incomplete applications will be returned.
- Publicity:** Focus on Energy reserves the right to publicize your participation in this program, unless you specifically request otherwise in writing. Requests should be emailed to bpforms@focusenergy.com.
- 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. Some Focus participating electric and/or natural gas providers have incentive programs outside of Focus on Energy. Customers of these providers might not qualify for incentives from both programs. These customers should check with their electric and/or natural gas provider to verify eligibility for dual incentives in order to comply with program rules.
- 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.
- Monitoring and Verification:** Focus on Energy evaluates program efficacy by monitoring energy use/production prior to and after installation of your energy efficiency or renewable energy project. Program staff may conduct this monitoring or perform an inspection of the facility to survey the installed projects. Your signature on this application provides Focus on Energy approval to obtain energy data directly from your electric and/or natural gas provider(s). 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 who are served by a participating electric provider but not a participating natural gas provider will only qualify for incentives for electric technologies. Customers who are served by a participating natural gas provider but not a participating electric provider will only qualify for incentives for natural gas technologies. Customers who have both a qualifying electric provider and a qualifying natural gas provider would qualify for incentives on both electric and natural gas technologies. Customers who use propane or other non-qualifying fuels will not qualify for incentives for any gas technologies.

MARKET PROVIDER INFORMATION

A market provider represents the company who provided/installed the equipment for your project or performed the service for which you are seeking an incentive. The FEIN and Business Classification of the market provider is required **IF** you received your incentive as a credit on your invoice, whereby the incentive is owed to the market provider. In this scenario, the credit must be clearly labeled as the Focus on Energy incentive and deducted from the amount due.

If your project was completed by more than one market provider (example, equipment was purchased from one market provider but installed by another market provider) and the incentive is being paid to you the customer, please enter the information of the market provider who installed your equipment in Section 4: Market Provider Information. If the equipment was self-installed, please enter the information of the market provider from whom you purchased the equipment.

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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