

HVAC FOR BUSINESSES 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).

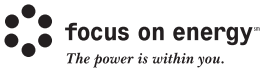
The undersigned agrees that the stated energy efficient measure(s) was (were) installed at the job site address listed above as part of the Focus on Energy Program. I have read and agree to the Terms & Conditions within this application. To the best of my knowledge, the statements made on this application 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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EQUIPMENT INSTALLED Please refer to instructions on Page 4 prior to completing this page

Specifications	Mfr. & Model Number(s)	Serial Number(s)	Size / EER	Quantity	Incentive	SUBTOTAL
Modulating Hot Water Boiler* <175 MBh input ≥90% AFUE see prequalified list			___ MBh input		\$200	
Modulating Hot Water Boiler* 175 to <300 MBh input ≥90% AFUE see prequalified list			___ MBh input		\$250	
Modulating Hot Water Boiler* 300–1000 MBh input ≥85% thermal efficiency			___ MBh input		\$0.60/MBh boiler input	
Return water temperature _____ °F (if condensing)	Bonus for each 1% thermal efficiency over 85% up to 89%				\$0.10/MBh boiler input /1% thermal efficiency	
Modulating Hot Water Boiler* 300–1000 MBh input ≥90% thermal efficiency			___ MBh input		\$1.50/MBh boiler input	
Return water temperature _____ °F	Bonus for each 1% thermal efficiency over 90%				\$0.15/MBh boiler input /1% thermal efficiency	
Boiler Controls* Outside Air Reset/Cutout Controls			___ MBh input of controlled boilers		\$75	
Furnace ≥90% AFUE w/ ECM see prequalified list			___ MBh input		\$150	
Infrared Heater* Existing Building			___ MBh		\$1.00/MBh	
Unit Heater* ≥90% thermal efficiency			___ MBh input		\$2.50/MBh input	
Rooftop/Unitary A/C <65 MBh ≥14.0 SEER or ≥11.6 EER			___ tons ___ EER		\$60/ton	
AHRI Ref #:	Bonus for each 0.1 EER over 11.6 EER or for each 0.1 SEER over 14.0 SEER				\$2/ton/0.1 EER or \$2.27/ton/0.1 SEER	
Rooftop/Unitary/Split System A/C 65-239 MBh ≥11.5 EER			___ tons ___ EER		\$60/ton	
AHRI Ref #:	Bonus for each 0.1 EER over 11.5 EER				\$2/ton/0.1 EER	
Rooftop/Unitary/Split System A/C 240-759 MBh ≥10.5 EER			___ tons ___ EER		\$60/ton	
	Bonus for each 0.1 EER over 10.5 EER				\$2/ton/0.1 EER	
PTAC (Packaged Terminal A/C) <8,000 BTU/hr; ≥12.1 EER 8,000–9,999 BTU/hr; ≥11.5 EER 10,000–12,999 BTU/hr; ≥10.9 EER ≥13,000 BTU/hr; ≥9.8 EER			___ BTU/hr ___ EER		\$50	
AHRI Ref #:						
PTHP (Packaged Terminal Heat Pump) <8,000 BTU/hr; ≥12.1 EER and ≥3.4 COP 8,000–9,999 BTU/hr; ≥11.5 EER and ≥3.2 COP 10,000–12,999 BTU/hr; ≥10.9 EER and ≥3.1 COP ≥13,000 BTU/hr; ≥9.8 EER and ≥3.1 COP			___ BTU/hr ___ EER ___ COP		\$75	
AHRI Ref #:						

*These incentives are only available to customers of participating NATURAL GAS utilities.

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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.

INSTRUCTIONS

- All equipment must be new and installed prior to submitting an incentive application form. Applications must be submitted within 30 calendar days of equipment installation.
- Equipment serial numbers are required. This information is often found on warranty documentation and/or on equipment nameplate.
- **Boilers, Boiler Controls and Infrared Heaters:** Propane (LP) customers are not eligible for these incentives.
- **Hot Water Boilers <300 MBh and Furnaces:**
 - Equipment must be ≥90% AFUE and have a sealed combustion unit. Boilers must modulate their firing rate. Furnaces must automatically vary output by using a variable speed (not two-speed or multi-speed) blower motor (ECM / brushless DC motor) and have at least two firing stages. Air handlers are not eligible.
 - Boiler and furnace incentives are only available for equipment used in space heating applications. Equipment serving process or other loads does not qualify.
 - These incentives are only available for pre-qualified models; for a list of pre-qualified models visit focusonenergy.com/Incentives/Business/Heating_Cooling.aspx.
 - If you plan to install a model that is not on the pre-qualified list, please submit an Equipment Qualification Form (also found on the Web site) before submitting the incentive application to verify that the model meets program criteria.
 - Chimney liners must be installed where a high efficiency natural gas furnace or boiler replaces atmospherically drafted equipment that was vented through the same flue as a gas water heater.
 - Flue closure protocol must be followed where a high efficiency furnace or boiler is installed and the chimney is no longer in use (i.e., by a gas water heater). Flue closure protocol can be found at focusonenergy.com/hvac.
 - High efficiency boilers will provide 90+ AFUE only if the return water temperature is cool enough to condense flue gasses. If the heating system configuration cannot provide necessary operating conditions to the boiler, selection of a high efficiency boiler may not be the best choice.
- **Hot Water Boilers 300 to 1000 MBh:**
 - Boiler must have thermal efficiency ≥85% and be capable of capacity modulation.
 - Submit boiler specifications with steady state boiler input and output ratings. Ratings are to be defined per ANSI Standard Z21.13 using supply and return water temperatures applicable for each individual installation. If a condensing model, provide manufacturer chart or graph indicating efficiency vs. return water temperature. If the manufacturer provides different curves for high fire or low fire, use the curve that offers greater efficiency.
 - Restricted to boilers used for HVAC, space heating installations (no direct or indirect domestic hot water heating). Industrial process boilers and domestic water heating boilers may qualify for a custom incentive. Direct inquiries to 800.762.7077 then #2 for Business Programs prior to project initiation or purchase of equipment.
 - For purposes of incentive calculation, boiler efficiencies will be rounded up or down to the nearest whole number (no decimals).
 - Boilers purchased or installed for backup or redundant systems are not eligible.
 - Condensing boilers (thermal efficiency ≥90%, typically) will provide maximum efficiency only if the return water temperature is cool enough to condense flue gasses. If the heating system configuration cannot provide necessary operating conditions to the boiler, selection of a non-condensing boiler may be more appropriate.
- **Boiler Controls:**
 - Outside air temperature boiler reset or cutout control incentive is intended for retrofit projects. New boilers equipped **with** these controls are **not** eligible. New boilers **not** equipped with these controls **are** eligible for retrofit.
 - System must have an outdoor air temperature sensor in a shaded location on the north side of the building.
 - System must be set so that minimum temp. is less than 10°F above boiler manufacturer's recommended minimum return temperature (unless unusual circumstances require a higher setting).
 - For controls on **multiple** boilers to qualify, control strategy must stage the lag boiler(s) only after the first boiler stage(s) fail to maintain the boiler water temp. called for by the reset control.
- **Infrared Heater:** Must have electronic ignition. Must be either directly vented outdoors with insulated flue pipe or indirectly vented by positive air displacement according to mfg. specifications. Both low-intensity and high-intensity heaters are eligible. Low intensity heaters must use outside non-conditioned combustion air.
- **Unit Heater:** Must be vented and condensate drained per manufacturer specifications. Retrofit unit heater must be an upgrade from a non-condensing unit heater.
- **Roftop / Unitary Air Conditioner:** Equipment must meet the nominal efficiency level based on the size category (1 ton = 12 MBh). Bonus incentives are granted for equipment exceeding the minimum required efficiency. Eligibility is based on information in the AHRI database (ahridirectory.org), or manufacturer specification if ≥240 MBh. For unitary/split system equipment ≥65MBh, efficiency is system EER, not EER of the condensing unit only.
- **Split System A/C (SEER 14, 15 or 16+):**
 - The condenser model and serial number, evaporator model and serial number, and AHRI reference number are required for all installations.
 - System efficiency is based solely on the evaporator and condenser coils; the SEER may not be increased by factoring in the efficiency of a variable speed forced air heating system fan, except where a two-stage air conditioner is installed.
 - All efficiency ratings will be verified using the AHRI database (ahridirectory.org).
 - Both the condenser and evaporator coils must be replaced. Refrigerant line diameters must meet manufacturer specifications.
 - Mini-split / ductless systems and air-source heat pumps that meet these efficiencies also qualify.
 - Split systems larger than 65 MBh may apply for incentives through the rooftop / unitary system section (1 ton = 12 MBh).
- **PTAC (Packaged Terminal Air Conditioner):** Eligibility is based on information in the AHRI database. Window air conditioners are not eligible.
- **PTHP (Packaged Terminal Heat Pump):** Must meet both heating and cooling specifications. Eligibility is based on information in the AHRI database.
- **Air-to-Air Energy Recovery Ventilator (ERV)**
 - Units replacing existing energy recovery ventilators do not qualify. Incentive intended for standard HVAC applications only; other applications such as industrial process heat recovery may be eligible for a custom incentive.
 - Please provide efficiency of the building's cooling and heating systems. This information will not affect ERV incentive.
 - Air-to-air energy recovery ventilators must be third-party tested and qualified by one of two methods.
 1. Equipment must be AHRI certified to standard 1060–2005 and bear the AHRI certification symbol for AHRI air-to-air energy recovery ventilation equipment certification program based on AHRI 106. The website listing AHRI certified air-to-air energy recovery ventilators is www.ahridirectory.org
 2. Alternatively, qualifying equipment independently tested and reported per ASHRAE standard 84–1991 will be accepted. A list of non-AHRI certified but ASHRAE pre-qualified equipment is available at www.focusonenergy.com/Incentives/Business/Heating_Cooling.aspx. If you plan to install a model that is not on the pre-qualified list, please submit an Equipment Qualification Form (also found on the website) and have the equipment added to the list before beginning the project to verify that the model meets program criteria.
 - Areas served by Energy Recovery Ventilators must be air conditioned during the periods of June through August, 1 p.m. – 4 p.m. and heated during the winter. Replacement of existing ERV and use of ERV where required by state code does NOT qualify.
- **Boiler Combustion Management System:** For linkageless control and oxygen trim control retrofits for boilers, use separate application form found at focusonenergy.com/Incentives/Business/
- **Commercial Ground Source (Geothermal) Heat Pump Heating & Cooling System:** Use separate application form found at focusonenergy.com/Incentives/Business/

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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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Questions: Call 800.762.7077 then #2 for Business Programs.