



# SPECIALTY MEASURES INCENTIVE APPLICATION

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](http://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)
	_____

## 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 <b>WI</b>	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):

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

**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](mailto:BPforms@weccusa.org).

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**SPECIALTY MEASURES INCENTIVE APPLICATION**

Measure	Quantity Installed	Incentive	SUBTOTAL		
<b>LODGING</b>	Guestroom Energy Management Control  _____ # of Rooms  System Controlled: _____ PTAC with Electric Heat _____ PTAC with other heat option* _____ PTHP* _____ Water Source Heat Pump* _____ Fan Coil*	\$75 per Room			
	* If not PTAC with electric heat, provide the following:				
	Average cooling capacity of units being controlled	COP (PTHP)	EER	Heating option included	
	For Water Source Heat Pump & Fan Coils:	Heating Source Type (i.e., Boiler, City Steam, etc.)	Heating System Efficiency (% AFUE)		
	Cooling Source Type (i.e., Chiller)	Cooling System Efficiency (kW/ton)			
<b>ALL MARKETS</b>	 ENERGY STAR® Vending Machines Are individual vending machine serial numbers included? <input type="checkbox"/> Yes	_____ # of Machines <input type="checkbox"/> Software Activated	\$100 per Machine		
	Vending Machine Controls	_____ # of Snack Machines controlled	\$15 per Snack Machine controlled		
	Does the device contain an external occupancy sensor? <input type="checkbox"/> Yes <input type="checkbox"/> No	_____ # of Cold Beverage Machines controlled	\$60 per Cold Beverage Machine controlled		
	PC Network Energy Management (see report requirements on Page 3 section D-4)	_____ # of PCs	\$6 per PC controlled		
	Truck Loading Dock Seals	_____ # of Dock Door Seals Check one: <input type="checkbox"/> Replacing existing seals <input type="checkbox"/> New installation	\$200 per Door Sealed		
		_____ # of Leveler Ramp Pit External Seals Is leveler ramp equipped with edge seal (brush-type or similar)? Check one: <input type="checkbox"/> No-Ramp has no edge seals <input type="checkbox"/> Yes-Edge seals installed during project <input type="checkbox"/> Yes-Has existing edge seals	\$100 per Ramp Pit Sealed		
	Residential-Type Energy Efficient Water Heaters	Power-Vented Natural Gas Energy Factor .64 to .79	_____ # of Water Heaters	\$50 per Water Heater	
		Power-vented natural gas tankless Energy Factor ≥0.80	_____ # of Water Heaters	\$100 per Water Heater	
Natural gas condensing Thermal Efficiency rating ≥90%		_____ # of Water Heaters	\$150 per Water Heater		
Indirect Water Heater Integrated with ≥90% AFUE Modulating Boiler		_____ # of Water Heaters	\$200 per Water Heater		
Electric Tank-type Water Heater Energy Factor ≥0.93		_____ # of Water Heaters	\$50 per Water Heater		
Residential-Type Water Heater Fuel Conversion <input type="checkbox"/> Electric to natural gas <input type="checkbox"/> Electric to LP or oil	_____ # of Water Heaters	\$250 per Water Heater conversion			
<b>TOTAL INCENTIVE REQUESTED</b>			<b>\$</b>		
Incentive not to exceed cost of the product, unless otherwise designated.					

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**Questions:** Call 800.762.7077 then #2 for Business Programs.

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## SPECIALTY MEASURES REQUIREMENTS:

### A. Guest Room Energy Management (GREM) Controls

1. Must be a lodging business.
2. The incentive is for occupancy-based guest room energy management controls.
3. Occupancy control may be key-activated or sensed due to motion or body heat and must control the HVAC system serving the room. Front Desk Only is not included in this incentive offering.
4. Please indicate type of equipment being controlled and answer related questions as indicated.

### B. ENERGY STAR® Vending Machines

1. Incentives are paid to owner of equipment. Invoice must indicate equipment manufacturer, model and serial number. Qualifying Wisconsin address of where unit was installed must be indicated on application or invoice.
2. Invoice paid once per equipment piece as determined by serial number. Program may periodically verify placement of equipment based on information provided.
3. A list of qualifying models can be found at [www.energystar.gov/ia/products/prod\\_lists/vending\\_machines\\_prod\\_list.pdf](http://www.energystar.gov/ia/products/prod_lists/vending_machines_prod_list.pdf).

### C. Vending Machine Controls

1. Incentives are paid to owner of equipment. Invoice must indicate equipment manufacturer, model and serial number. Qualifying Wisconsin address of where unit is to be installed must be indicated on application or invoice.
2. Controls must include a passive infrared occupancy sensor to turn off fluorescent lights and compressor when surrounding area is unoccupied for 15 minutes or longer. Alternatively, system will leave lights and card reader electronics on while controlling compressor operation based on sales activity instead of occupancy. Control should periodically power up machine at 2-hour intervals to maintain product temperature and provide compressor protection.
3. Control for refrigerated vending machines is for machines containing only non-perishable bottled and canned beverages.

### D. PC Network Energy Management

1. Incentive is for sophisticated IT environments that dynamically control many computers from one central location. Simply activating the energy saving settings on the computer operating system does not qualify.
2. Must provide invoice for materials, and incentive is limited to 50% of project costs.
3. Must report the number of PCs to be controlled using the energy management software.
4. PC Network energy management system must collect data over time and offer a system-wide energy savings reporting function. Must provide this report on a representative number of PCs to monitor and document the potential for energy savings within the partner's facility. This representative number of PCs shall not be fewer than 10% of the total number to be controlled or 5% for installations expected to impact more than 1,000 PCs. Report must cover at least one full week ( $\geq 7$  days) of system operation; longer period preferred.
5. Must certify that policies and procedures are in place to ensure that the installed software remains in place and continues to control the PCs on the network. Focus on Energy reserves the right to review software server records to assess the ongoing effectiveness of the installation.

### E. Truck Loading Dock Seals

1. These incentives are intended to reduce air infiltration at truck loading docks. Seals must effectively close all gaps between the building and semi trailer. To qualify, building interior space must be heated during winter. Refrigerated interior space may qualify for a custom incentive only; contact Focus on Energy prior to project initiation.
2. Dock door seals extend out to fill the gap between the dock door and the trailer, including the "hinge gap" that occurs with outwardly swinging trailer doors.
3. Pit seals reduce air infiltration from the built-in pit that houses the leveler ramp lifting mechanism. Pit seals must be attached to the exterior of the building and may be used in conjunction with brush-type or whisker-type interior perimeter/edge seals. Incentive is not available for the replacement of existing pit seals.

### F. Residential-Type Energy Efficient Water Heaters

1. These incentives are for residential-type water heaters. Commercial grade water heaters must go through the custom program. Water heaters for dairy farm milk houses may not use residential type equipment and must use the Dairy and Livestock Incentive Application.
2. The following types of equipment may qualify:
  - Residential natural gas storage water heater with energy input ratings of  $\leq 75$  MBh and with a storage capacity of not less than 20 gallons nor more than 100 gallons.
  - Residential power-vented natural gas instantaneous water heater with input ratings greater than 50 MBh but less than 200 MBh designed to deliver water at a controlled temperature of less than 180° F.
  - Residential indirect water heater integrated with  $\geq 90\%$  AFUE modulating boiler.
  - Residential electric storage water heater with energy input rating of  $\leq 12$  kW and with a storage capacity of not less than 20 gallons nor more than 120 gallons.
3. Must be central units used to supply domestic hot water to an entire premise. Point-of-use units are not eligible.
4. Equipment rewards are based on the Energy Factor and Thermal Efficiency rating of the unit. Energy Factor is the overall efficiency rating of the water heater. Recovery efficiency rating may NOT be substituted for Energy Factor Rating.
5. Equipment eligibility is verified through AHRI Directory of Certified Product Performance for Water Heating Equipment ([ahridirectory.org](http://ahridirectory.org)) and other reliable sources.
6. Electric Water Heater incentive is limited to customers that do NOT have natural gas service available in their area, or a natural gas unit is not practical.
7. Water heaters fueled by LP/propane are NOT eligible for equipment incentive, but may be eligible for the fuel conversion incentive.

### G. Residential-Type Water Heater Fuel Conversion

1. Fuel conversion from electric to natural gas or LP or oil is eligible. Conversion to electric is not available.
2. Must install new unit that meets power vent and Energy Factor or Thermal Efficiency criteria listed in the water heater requirements.
3. Documentation of fuel conversion is required.

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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](http://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](http://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](http://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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