

# Homeowner Participation Form

To be completed by the homeowner and General Contractor/Installer. Answer the following questions based on your house prior to the installation of the ductless system(s). All fields are required for site pre-approval. Ensure installer eligibility with your utility prior to selecting an installer.

Official Use Only: Project ID

## Contact Information

|   |   |  |  |
|---|---|--|--|
| Homeowner name:   |   | Name of General Contractor installing ductless system: |  |
| Home phone:<br>( ) -  | Alternative phone:<br><input type="checkbox"/> Cell <input type="checkbox"/> Work ( ) - | E-mail Address:  |  |
| Site Address:   | City/State/ZIP code:  | County:  |  |
| Homeowner mailing address: (if different from site address) |   | City/State/ZIP code:                                   |  |

## Homeowner Eligibility

|   |  |  |
|---|--|--|
| What type of primary electric resistance heat does the house have? <input type="checkbox"/> Zonal <sup>1</sup> <input type="checkbox"/> Electric Hydronic <input type="checkbox"/> Furnace <sup>2</sup>                                       |  | <p><b>Please note:</b> Secondary heating systems are allowed only if electric resistance heating is used as primary heating system.</p>          |
| If zonal, where are the heating units located (Check all that apply)? <input type="checkbox"/> Ceiling <input type="checkbox"/> Wall <input type="checkbox"/> Baseboard <input type="checkbox"/> Floor  |  |  |
| Does the home have a secondary heating system? <input type="checkbox"/> Yes <input type="checkbox"/> No   |  |  |
| If yes, what type (mark one): <input type="checkbox"/> Freestanding Stove <input type="checkbox"/> Fireplace <input type="checkbox"/> Other: _____  |  |  |
| If yes, what type of fuel (mark one): <input type="checkbox"/> Wood <input type="checkbox"/> Pellets <input type="checkbox"/> Propane<br><input type="checkbox"/> Kerosene <input type="checkbox"/> Oil <input type="checkbox"/> Other: _____ |  |  |
| If yes, how much fuel (per year): _____<br>(Amount in cords of wood, pounds of pellets, gallons of propane/kerosene/oil, etc.)  |  |  |
| How was the home constructed? <input type="checkbox"/> Site-built <input type="checkbox"/> Manufactured Home <sup>2</sup>   |  |  |
| Which of the following describes the home? <input type="checkbox"/> Detached single-family house <input type="checkbox"/> Duplex <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex   |  | <input type="checkbox"/> <b>Multi-Family</b> If you live in a multi-family home, please verify your eligibility with your installer and utility. |

## Site Information

|   |  |
|---|--|
| Has this party occupied the home for more than one year? <input type="checkbox"/> Yes <input type="checkbox"/> No   |  |
| Is this home a <u>primary</u> residence? <input type="checkbox"/> Yes <input type="checkbox"/> No   |  |
| Who occupies this home? <input type="checkbox"/> Homeowner <input type="checkbox"/> Renter  |  |
| Does the house have a natural gas meter? <input type="checkbox"/> Yes <input type="checkbox"/> No   |  |
| Total number of occupants living in home: _____<br>Number of occupants under 25 years: __ Number of occupants between 25-39 years: __ Number of occupants between 40-65 years: __ Number of occupants over 65 years: __ |  |
| Number of stories in house: _____   | Number of bedrooms in house: _____                       |
| House/Unit square footage (If unknown, please estimate): _____  | Year home was built (If unknown, please estimate): _____ |
| Foundation type (check all that apply): <input type="checkbox"/> Basement <input type="checkbox"/> Crawlspace <input type="checkbox"/> Slab <input type="checkbox"/> Other: _____                                       |  |
| Does the home have air conditioning? <input type="checkbox"/> Yes <input type="checkbox"/> No   |  |
| If yes, what type (mark one): <input type="checkbox"/> Central <input type="checkbox"/> Zonal (i.e. window and/or room A/C units), no. of units: _____ <input type="checkbox"/> Evaporative cooler (e.g., swamp cooler) |  |
| Has your home been weatherized/insulated? <input type="checkbox"/> Yes <input type="checkbox"/> No  |  |

<sup>1</sup> Zonal heating includes electric, non-ducted: ceiling cable, wall, baseboard, plug-in and hydronic floor.

<sup>2</sup> Please check with your electric utility for eligibility.

# Terms and Conditions

**OFFICIAL FORM:** This form and any required additional documentation, including installation invoice, must be filled out completely, truthfully and accurately. The NW Ductless Heat Pump Project ("the Project") will not be responsible for lost documentation pertaining to the submission of this form. Project details, including incentives, are subject to change without prior notice.

**HOMEOWNER ELIGIBILITY:** To be eligible for incentive payment, the home must have permanently installed zonal electric resistance heat as the primary heating system. **EXCEPTION:** In some utility areas single family site built or manufactured homes that have an electric forced air furnace as their primary heating system may qualify. A qualifying home cannot: (i) be under construction, (ii) have a fossil fuel central forced air or fossil fuel hydronic heating system, (iii) have a ducted heat pump/ductless split-system, nor (iv) have a temporary foundation.

**HOMEOWNER PARTICIPATION:** The NW Ductless Heat Pump Project and participating utilities may suspend and/or end Applicant's participation at anytime, at their sole discretion by notifying the Applicant in writing of the decision or in accordance with the Project's requirements.

**SYSTEM ELIGIBILITY:** To be eligible for incentive payment, ductless heat pumps installed as part of the Project must be: (i) a split system heat pump employing an inverter-driven, variable speed compressor, a variable speed outdoor fan, and a multi-speed or variable speed indoor blower, (ii) must meet a minimum HSPF rating of 9.00, or higher, for single zone systems, or 8.00 or higher, for multi-zone systems, and (iii) indoor units using any type of field-installed duct system are NOT eligible.

**INSTALLER ELIGIBILITY:** Installers must be licensed, bonded and insured, have successfully completed manufacturer sponsored training for equipment being installed and the Project orientation. Installers must be currently eligible participants in the Project in order for utilities to pay incentives. **Ensure installer eligibility with your utility prior to selecting an installer.**

**VERIFICATION AND INSPECTION:** Participating homes are subject to onsite inspections in order to verify that the system meets Project standards and that the home meets eligibility guidelines. Systems will be randomly chosen for onsite inspection, based on the number of completed installations by the installer. No warranty is implied by this inspection.

**INCENTIVE PAYMENT:** The Project will approve utility incentive payment upon receipt of all complete and correct documentation. The Project will provide approved incentive payment information to the appropriate utility for payment. One incentive per residence is available regardless of the number of units installed in the home.

**FACSIMILE/SCANNED:** Facsimile transmission of any signed original document, and the retransmission of any signed facsimile transmission, shall be the same as delivery of the original signed document. Scanned original documents transmitted to the Project as an attachment via electronic mail shall be the same as delivery of the original signed document. At the request of the Project, the Participant shall confirm documents with a facsimile transmitted signature or a scanned signature by providing the original document.

**TAX LIABILITY:** Neither the Project nor the installer is responsible for any tax liability, which may be imposed on the Participant as a result of payment of any incentives or as a result of obtaining financing.

**DISCLAIMER/NO LIABILITY:** The Participant understands that the Project is not supervising work performed for the Participant and is not responsible for proper completion of that work or proper performance of any products purchased. The Participant assumes the risk of any loss or damage in connection with installation. The Project does not guarantee any particular energy savings results by its approval of the installation.

**ENDORSEMENT:** The Project does not endorse any particular manufacturer, installer, or product in promoting Ductless Heat Pumps. The fact that the names of particular manufacturers, installers, or products may appear on Project materials does not constitute an endorsement. Manufacturers, installers, or products not mentioned are not implied to be unsuitable or defective in any way.


**SAFETY AND BUILDING CODES:** The Participant agrees to pursue compliance with federal, state, and local building and environmental codes for the installation of this product. The installer certifies products have been installed consistent with manufacturer instructions.

**PROPERTY RIGHTS:** The Participant must have proper authority to install the ductless heat pump system on the designated property, or has obtained any necessary consent from the landlord.

**ACCESS AND EVALUATION:** The Project and its representatives may request access to the property on which the system was installed to review and evaluate the system during and after installation. The Participant agrees to provide reasonable access to the property for the purposes described herein. In addition, the Northwest Energy Efficiency Alliance and its representatives may contact the participant for future research and program participation.



**Billing Release** *To be filled out by the electrical utility account holder. Note: If the home is occupied by a tenant, or the account holder is different from the homeowner listed in the contact information, the billing release should be signed by the person whose name appears on the electric utility account. Signing the Billing History Release is optional. By doing so, the homeowner is allowing the performance data on their DHP installation to be used in the regional Project evaluation to determine energy savings and consumer satisfaction.*

**INFORMATION TO BE RELEASED:** *The undersigned utility customer requests and authorizes the specified utility to release billing and usage information for the account listed below to the NW Ductless Heat Pump Project. With this authorization, the NW Ductless Heat Pump Project can request billing information for up to two years pre-installation and two years post-installation. The utility customer also hereby releases the utility company from any and all liability arising from or connected with providing this information.*

|  |  |   |              |
|--|--|---|--------------|
| <b>Electric utility name:</b>  |  | <b>Electric utility account number:</b> |              |
|  | <b>Account holder signature (optional):</b> <input type="checkbox"/> | <b>Account holder name:</b>             | <b>Date:</b> |
|  | <i>By checking this box, you are agreeing to the above terms.</i>    |   |              |

## Homeowner Signature

*By signing or checking the electronic signature box below, the homeowner certifies that he/she is in compliance with the above terms and conditions.*

|  |   |   |                             |              |
|--|---|---|-----------------------------|--------------|
|  | <b>Homeowner signature:</b> <input type="checkbox"/>                    |  | <b>Homeowner signature:</b> | <b>Date:</b> |
|  | <i>By checking this box, you are providing an electronic signature.</i> |   |                             |              |

**Where did you hear about ductless heating and cooling systems?**  Utility Bill Insert  Utility Website  Direct Mail from an Installer  Door Hanger  Radio  TV  Newspaper  Internet Ads  Facebook, Twitter, etc.  In a Store (retail)  Family or Friend  Utility Display Unit  Other \_\_\_\_\_