

Instructions for completing the NE&C HVAC Incentive Worksheet

General Notes

1. The Unitary Application must be completed and the Incentive approved prior to purchasing or installing the equipment.
2. Unitary capacity (in tons) should be Air Conditioning and Refrigeration Institute (ARI) net capacity, not gross capacity.
3. Invoices will be required for payment of Incentives.

Eligibility Requirements:

1. The proposed unitary(s) must meet the minimum efficiency requirements listed on the Incentive worksheet.
2. Split systems must list the matching indoor evaporator coil/fan equipment with the outdoor equipment.
3. The Incentive offer is not valid unless signed and dated by the Utility Representative. The Customer accepts the Utilities Incentive offer and agrees to the Terms and Conditions of the Utility by signing the pre-approval offer.

Pre-Installation:

1. Review the Incentive eligibility requirements.
2. Review the proposed equipment specifications to confirm it meets the minimum efficiency requirements.
3. Provide to the utility representative the manufacturer's equipment specifications and record the following information on the worksheet:
 - o Equipment (U = unitary; H = heat pump; or S = split)
 - o Building Type (Hospital, Office, Retail Store, School or Other)
 - o Manufacturer and Model Number (see the example on the HVAC Incentive Worksheet)
 - o Unit Size (tons) (a) and Efficiency (EER or SEER) (b)
4. Look up and fill in the Incentive amount from the Unitary Worksheet (c), Quantity (d) and the total Incentive (e).

Explanation of how to fill out table:

NE&C HVAC INCENTIVE WORKSHEET							
Unit Type	Building Type:	Manufacture / Model Number	Unit Size (tons)	Unit Efficiency (EER or SEER)	Incentive (\$/ton)	Qty	Total Incentive (\$)
			(a)	(b)	(c)	(d)	(a *c *d)
U	Office	ACME, HV1011	10	11.6 EER	\$50	2	10 * \$50 * 2 = \$1,000
U=unitary H =heat pump, S=split	Hospital, Office, Retail, Store, School, or Other	Information found in the Manufacturer's specification	ARI Net capacity, not gross capacity	Information found in Manufacturer's specification	Refer to Table on Incentive Form	Number of Units to be Installed	Calculate the Incentive

Post-Installation:

Utility Representative must verify that:

1. The HVAC equipment has been installed and operable.
2. The HVAC equipment matches the HVAC Incentive Application information. If the equipment has changed from what was approved for the initial Incentive offer, the substituted equipment specifications must be submitted and reviewed by the utility to verify compliance with technical requirements and approved before an Incentive is considered.
3. The Invoice or proof of payment has been submitted.
4. The Utility Representative & Customer have signed / dated the post installation inspection block on the Incentive form.