

# Massachusetts COOL SMART<sup>®</sup>



## 2015

### RESIDENTIAL DUCTLESS MINI-SPLIT HEAT PUMP

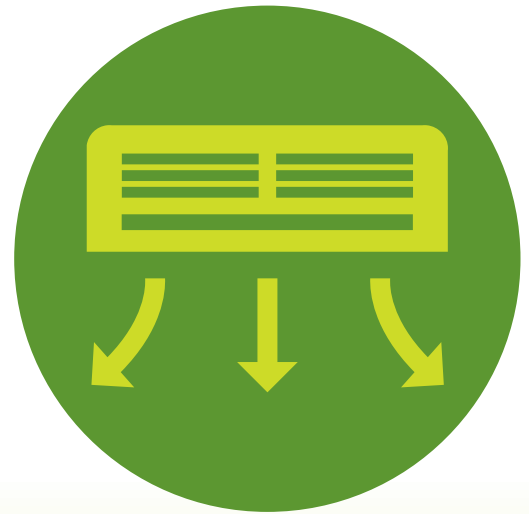
### Rebate Application



# Ductless Mini-Split Heat Pump

# REBATE

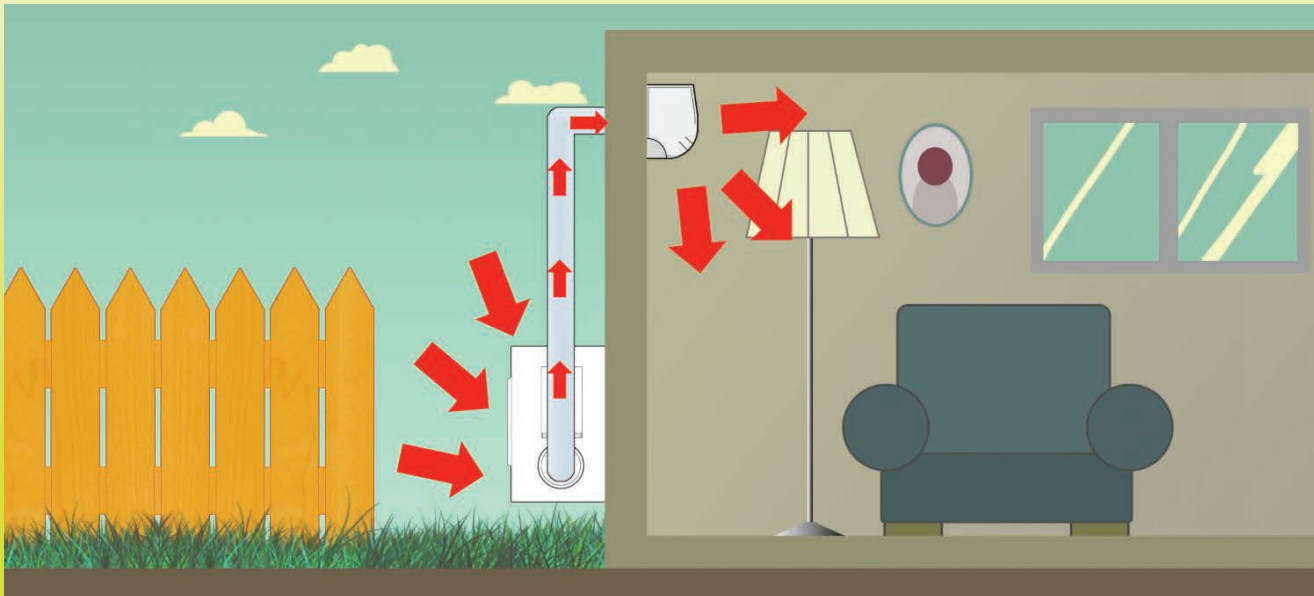
COOL SMART is offering residential customers of program sponsors up to a **\$500** rebate for purchasing and installing a ductless mini-split heat pump that meets the program's energy efficiency standards.



Up to a \$500 rebate for ENERGY STAR® qualified cooling equipment



Qualify for 0% financing through HEAT Loan Program (restrictions apply)



## WHAT IS A DUCTLESS MINI-SPLIT HEAT PUMP?

The term ductless means no ductwork is involved. The system is composed of two components: an outdoor condensing unit and one or more indoor air handling units, connected by a conduit through your wall.

Think of a standard window AC system that is “split” into an indoor air handler and an outdoor condensing unit. Ductless mini-split heat pumps can produce cooling for the summer months and heating in the winter months.

Much like a refrigerator or window AC, these components move heat from one place (inside) to another (outside)

to cool your home. However, Heat Pumps have an added advantage of “running in reverse” extracting energy from outside air and converting it into heat for your home.

## HOW DOES A MINI-SPLIT WORK? IS IT THE BEST OPTION FOR MY HOUSE? WHY ARE THEY MORE ENERGY EFFICIENT?

To determine if a mini-split may be the right option for your home, take a few minutes to review the videos on the webpage noted below. They can answer some of your questions and provide more information on the best uses of a ductless mini-split system.

For More Information on how Mini-Split Heat Pumps work, please visit: [MassSave.com/CSVideos](https://www.mass.gov/info-details/mass-save-program).



# 2015 MA COOL SMART® Residential Ductless Mini-Split Heat Pump Application

Offer valid on equipment purchased and installed between **January 1, 2015—December 31, 2015** (subject to funding availability). **All submissions must be postmarked by January 31, 2016**



## TO RECEIVE YOUR REBATE CHECK BY MAIL, FOLLOW THESE STEPS

- 1) Work with a licensed contractor to install a qualifying product at a property with an active residential electric account with one of the participating utilities or energy efficiency service providers.
- 2) Obtain your contractor's invoice with equipment make, coil and condenser model numbers, size in tons, date and location of installation and total installation cost. *(all items required)*
- 3) Mail the following **required documents** to the address on the right:
  - a. This application, completed accurately and legibly.
  - b. Contractor's invoice showing required information and proof of purchase.
  - c. Copy of the AHRI Certificate. Visit [www.ahridirectory.org](http://www.ahridirectory.org) or contact your heating and air conditioning contractor to obtain a copy.
  - d. Copy of your most recent electric utility bill.

**(!) IMPORTANT:** Sign and photocopy your entire submission for your records. You could be required to mail these photocopies.

**Send completed application with all corresponding documentation to:**

COOL SMART (MA)  
Offer# H446569  
PO Box 540064  
El Paso, TX 88554-0064

Please allow 6-8 weeks for processing. To review the status of your application or to ask questions, call **1-877-333-8153**.

**Save Time! Submit Online!**  
[www.smartenergy-zone.com/coolsmart](http://www.smartenergy-zone.com/coolsmart)  
for application and more information

Rebate Amount	Qualifying Products	SEER <sup>1</sup>	HSPF <sup>3</sup>
\$250	Ductless Mini-Split Heat Pump	≥ 18	≥ 9
\$500	Ductless Mini-Split Heat Pump	≥ 20	≥ 11

<sup>1</sup>SEER—Seasonal Energy Efficiency Ratio.  
<sup>3</sup>HSPF—Heating Seasonal Performance Factor.

**NEW EQUIPMENT INSTALLED (to be completed by contractor)**  New Construction  Replacement system  Replaced failed equipment

<input type="checkbox"/> Mini-Split Heat Pump	Install date (mm/dd/yyyy):	AHRI Ref. #:	Rebate Amount:	# of Units:
<input type="checkbox"/> Mini-Split Heat Pump	Install date (mm/dd/yyyy):	AHRI Ref. #:	Rebate Amount:	# of Units:
<input type="checkbox"/> Mini-Split Heat Pump	Install date (mm/dd/yyyy):	AHRI Ref. #:	Rebate Amount:	# of Units:

**RESIDENTIAL CUSTOMER INFORMATION (check one)**  NSTAR Electric  National Grid  Western Massachusetts Electric Co  Cape Light Compact  Unitil

Customer Name: Residential Electric Account Number (must match install address):

Installation Address: Installation City: State: Installation Zip Code:

Home Phone: Business Phone: E-mail Address:

Did you have a Mass Save Home Energy Assessment?  Yes  No Is Heat Loan Financing being used?  Yes  No

What is your existing heating fuel?  
 Natural Gas  Electric  Oil  Propane  Wood/Other Do you know about Cold Climate Heat Pumps?  Yes  No

**PAYEE INFORMATION/MAIL REBATE TO**  Same as Account Holder  
*(If payee information is different from account holder information and the electric utility provider is National Grid, additional processing time will be needed for payee verification.)*

Payee/Company Name: Tax I.D. Number (if owner is incorporated and rebate is over \$600):

Mailing Street Address: City: State: **MA** Zip Code:

Contact Person: E-mail Address: Telephone:

## CONTRACTOR INFORMATION (Contractor Questions: Call 1-800-473-1105 or e-mail [info@mycoolsmart.com](mailto:info@mycoolsmart.com))

Company Name: Contact Person:

Address: City: State: Zip Code:

Telephone: E-mail Address: Is technician NATE Certified? (not required for rebate eligibility)  Yes  No

**I certify that all information above is correct to the best of my knowledge and that I adhere to all terms and conditions of this rebate. I certify that I have received and read the attached information about mini-splits.**

Date: (MM/DD/YYYY)

**X Customer Signature:**



# 2015 MA COOL SMART Residential Ductless Mini-Split Heat Pump Application

## Terms and Conditions



### ENERGY STAR® EQUIPMENT REQUIREMENTS

**System Requirements:** Ductless mini-split units must be qualified, listed with and certified by the Air Conditioning, Heating, and Refrigeration Institute (AHRI), and meet the program SEER and HSPF requirements (see table on page 1). For ductless mini-split heat pump systems, for rebate purposes, the unit consists of outdoor condenser and indoor unit(s).

**Proof of Purchase:** A copy of the customer's invoice itemizing the purchased equipment must accompany each rebate application form. The invoice must indicate the equipment type, size, make, model, name of purchaser, installation date and location, date of purchase and total installed cost.

**Information Sources to Verify Equipment:** SEER and HSPF ratings for condenser, and coil (if applicable) must be provided. Both the Consortium for Energy Efficiency (cee hvac directory.org) and the AHRI directory (ahri directory.org or call 703-600-0384) web sites list SEER and EER values. AHRI also provides AHRI numbers. Manufacturer's spec sheets may be accepted ONLY if equipment is not yet AHRI rated and ONLY if AHRI listing is pending.

**Owner's Certification:** Owner certifies that he/she has purchased and installed the equipment listed on this application at the defined location. Owner agrees that all information is true and that he/she has conformed to all offer and equipment requirements listed. Owner has verified that the units(s) listed on this application have been installed or serviced correctly. There are no unusual noises or vibrations and all controls have been calibrated. Owner or owner's representative has been instructed on how to operate and maintain this equipment and has received all necessary operation and maintenance manuals provided by the manufacturer with the new unit(s).

### GENERAL REQUIREMENTS

**Time Limit:** Qualifying units for equipment rebate must be purchased and installed between January 1, 2015 and December 31, 2015. Applications must be postmarked by January 31, 2016. For new construction only, extension of 2015 offers up to the end of 2016 must be requested and approved in 2015. Program is subject to change without prior notice, including rebates and incentive levels.

**Geographic Requirements:** Offers valid only for residential electric customers in MA where COOL SMART is offered by Cape Light Compact, National Grid, NSTAR Electric, Unitil and Western Massachusetts Electric Co.

**Application Form:** This application must be filled out completely, truthfully, and accurately. The customer or contractor must date and submit the completed application along with all required documentation for specific rebates and/or incentives. By submitting the rebate application, the customer and contractor agree to abide by these Terms and Conditions.

**Payments:** From the time the application is processed and approved, please allow 6-8 weeks for payment. Payment processing will take longer if information or documentation are missing from the application.

**Approval and Verification:** Sponsors reserve the right to verify and to have reasonable access to the residence to inspect the HVAC system installed prior to issuing rebates; this right to access extends up to one year after date of application, even if rebates have been paid.

**Tax Liability:** Sponsors will not be responsible for any tax liability that may be imposed on the customer or contractor as a result of the payment of rebates.

**Endorsement:** Sponsors do not endorse any particular manufacturer, product, system design, or technology in promoting these offers.

**Warranties:** SPONSORS DO NOT WARRANT THE PERFORMANCE OF INSTALLED OR SERVICED EQUIPMENT, EXPRESSLY OR IMPLICITLY. Program sponsors make no warranties or representations of any kind, whether statutory, expressed, or implied, including, without limitations, warranties or merchantability or fitness for a particular purpose regarding the HVAC equipment or services provided by a manufacturer or vendor. Contact your contractor for details regarding equipment performance and warranties.

**Limitation of Liability:** Sponsors and their rebate administrator's liability is limited to paying the rebate and incentive specified. Sponsors and their rebate administrator are not liable for any consequential or incidental damages or for any damages in tort connected with or resulting from participation in these offers.

**Contractor Certification:** Contractor certifies that installation and services performed have been in accordance with all applicable municipal, state and federal codes, standards and regulations, as well as program requirements pertaining to the installed system.



**Energy Benefits:** Customer agrees that the Energy Efficiency Program Provider (EEPP) has the unilateral right to apply for any ISO-NE capacity payments or environmental credits resulting from this energy efficiency project, and agrees not to file for such payments or credits either directly or indirectly. Manufacturer and/or retailer agree to provide the EEPP with such further documentation as the EEPP may request to confirm the EEPP's ownership of such benefits.



## Ductless Mini-Split Heat Pumps: What You Should Know

- ✓ Ductless mini-split heat pumps can be installed by any MA licensed HVAC contractor.
- ✓ As with any home improvement, it is good practice to obtain quotes from multiple contractors.
- ✓ Regardless of your objective, be clear about understanding how your ductless mini-split heat pump will perform in freezing temperatures.

### Typical Objectives of Residential Ductless Mini-Split Heat Pump Installation:

- 1. Reduce the Amount of Heat Supplied by Oil, Propane or Electric Resistance:**  
Strategically placed units can offset the costs of these heating sources during moderate winter temperatures. In this scenario, your existing heating system(s) will still be required for central heating, especially during extreme cold weather.
- 2. Heating and Cooling an Individual Room:**  
This more traditional option addresses a specific need for space heating or cooling, such as replacing room air conditioners or heating/cooling an addition to your home where ductwork is not available.
- 3. Heating and Cooling the Whole House:**  
To supply all of a home's heating and cooling, more than one unit is often required. This option requires special attention to the placement of your ductless mini-split heat pump's indoor and outdoor equipment. Some ductless mini-split heat pumps are designed for cold-climate performance, but system efficiency and heating capacity may still be negatively affected by freezing temperatures.

As with any heating or cooling installation, the size of your system is critical to performance. A system that is too large can be wasteful, and a system that is too small will not provide proper comfort. Ask your contractor to size the system appropriately to meet your objectives.

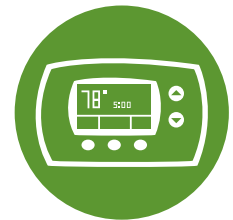
### Additional Considerations:



**Thermostat controls in heating season.** Please note that when a mini-split heat pump is installed in a home with an existing heating system and is operating in the heating mode it may impact your existing central heating thermostat(s). It is recommended to consult your heating professional to discuss the temperature settings and location of your existing thermostat(s) to ensure proper operation, comfort, and energy savings.



**During the heating season,** ductless mini-split heat pumps may run continuously regardless of the indoor/outdoor temperature. As the indoor temperature nears the desired degree setting, the unit will ramp down, reducing electrical use while keeping you comfortable. You may set your thermostat down a few degrees during unoccupied times, but leaving the system on may optimize comfort and efficiency.



**While in cooling mode,** continuous operation removes the maximum amount of moisture within your home, lowering relative humidity to the target range of 50-55%. Your ductless mini-split heat pump system operates most efficiently at its lowest speed. You should leave the system running when you plan to cool your home for extended periods of time. You may set your thermostat up a few degrees during unoccupied times, but leaving the system on may optimize comfort and efficiency.

# MASS SAVE® HEAT LOAN PROGRAM: STEPS TO PARTICIPATE

Below we have outlined the steps to participate in the Mass Save HEAT Loan Program, as a guide to help you throughout the process.

Customer completes a Mass Save Home Energy Assessment

For eligible 1-4 unit homes. If you live in a condo complex, refer to [MassSave.com/HEATLoan](https://masssave.com/HEATLoan).

Customer receives a HEAT Loan Intake Form at the time of their Assessment

Customer decides what they want to finance and refers to the appropriate applicable form(s) for specific details

Use checklists for information on finding a contractor.

The Mass Save program recommends the customer verify that the contractor is licensed and insured.

Complete, sign and submit the HEAT Loan Intake Form, along with signed contractor proposals

HEAT Loan Administrator will review customer paperwork to confirm program eligibility

HEAT Loan Administrator will contact customer with any questions or missing information.

HEAT Loan Administrator will issue a HEAT Loan Authorization Form once all paperwork is approved

You must receive an Authorization Form from the HEAT Loan Program Administrator, before you can apply for a loan. The authorized loan amount will be minus any sponsor rebates.

Customer takes Authorization Form to a Participating Bank/Credit Union (Lender) to apply for their loan

Customer must contact the Lender directly to initiate the application process. The Lender, determines loan approval or denial.

If approved, customer will receive two party check(s) from Lender

Check(s) issued by Lender, made out to both the customer and the contractor. Check will be for the full amount of the loan, minus applicable rebates.

Customer completes the financed improvements within 90 days of loan closing

Please contact the HEAT Loan Administrator if changes to the work scope have been made.

Once the work has been completed, customer pays their contractor by signing over the bank check

Customer contacts the HEAT Loan Administrator once the work has been completed for a verification inspection

This verification inspection is required for all customers who have finalized a loan with a participating lender.

After receiving their loan, customer completes rebate application(s) for installed equipment (refer to "How to Apply" form for details on applying for any sponsor rebates)

Be sure to submit your rebate applications to the appropriate parties.



## STILL HAVE QUESTIONS?

Call: **866-527-SAVE (7283)** Visit: [MassSave.com/HEATLoan](https://masssave.com/HEATLoan)  
for additional information.