



# Heat Pump Water Heater Incentives

Utah Residents

For work completed on or after December 1, 2016

Heat Pump Water Heater Incentives		
Your trade ally or store associate can help you find eligible products		
Incentive	Tier 1	Tier 2 and above
Customer Incentive	\$400	\$550
Trade Ally Incentive	\$175	\$150

### Instructions

Steps and requirements to earn each incentive

- 1. Ensure the home qualifies**
  - Must be an existing home, not new construction
  - Work completed must comply with all building codes and standards
  - Heat pump water heater must be installed within 90 days of purchase
- 2. Purchase a new qualifying product**
  - Heat pump water heater must be on Qualified Products List at the time of purchase: [rockymountainpower.net/ut-qpl](http://rockymountainpower.net/ut-qpl)
  - Heat pump water heaters with tank sizes above 55 gallons are not eligible
  - For tier qualifications, please reference the Qualified Products List
- 3. Replace an existing product**
  - Previous product must be an electric storage water heater (incentive does not apply when replacing an existing heat pump water heater)
  - Gas system conversions do not qualify
- 4. Hire a program-eligible trade ally for service or self-install**
  - Trade ally must be on Plumbing Trade Ally List available at [rockymountain.net/ut-tradeallies](http://rockymountain.net/ut-tradeallies)
  - Self-installed heat pump water heaters only qualify for the customer incentive
- 5. Install products properly**
  - Heat pump water heater must be installed by a trade ally or self-installed by homeowner
  - Installation must meet the specifications found in the Utah Technical Specifications Manual available at [rockymountainpower.net/ut-ta-resources](http://rockymountainpower.net/ut-ta-resources)
- 6. Complete and sign this application**
  - Homeowner completes section 1
  - Self-installed heat pump water heaters, homeowner completes the product and installation information in section 2
  - Trade ally completes section 2
- 7. Include an itemized receipt or invoice**

Itemized receipt/invoice details must clearly show and describe:

  - Product and/or installation costs (materials, labor, service)
  - Model number
  - Date work initiated
  - Date work completed

## Instructions Continued

### 8. Mail all documents so they are postmarked within 180 days of the qualifying service completion

Make copies for your records. Documents to mail include:

- This completed and signed application
- Itemized receipt or invoice
- W-9 tax form for businesses or non-individual customers, including landlords, applying for incentives
- Third Party Payment Addendum for homeowners who are not listed on the utility account and who are applying for incentives

## SECTION 1 - Homeowner completes and submits with section 2

### Homeowner and Home Information

Utility account number									-						
Name on utility account															
Address where product was installed								City			State		Zip Code		
Address where incentive check should be mailed								City			State		Zip Code		
Daytime phone for questions about your application								Email address for questions about your application							
Home type: <input type="checkbox"/> Single family home <input type="checkbox"/> Manufactured home <input type="checkbox"/> Multifamily home															
Home's <b>previous</b> primary water heating fuel source (select one)															
<input type="checkbox"/> Electric				<input type="checkbox"/> Gas				<input type="checkbox"/> Other							
Home's <b>current</b> primary cooling source (select one)															
<input type="checkbox"/> Central air conditioner				<input type="checkbox"/> Evaporative cooler				<input type="checkbox"/> Electric heat pump (ducted or ductless)				<input type="checkbox"/> None			
Does home's <b>current</b> primary cooling source serve at least 80% of the home's conditioned living space? <input type="checkbox"/> Yes <input type="checkbox"/> No															
Home's <b>current</b> primary heating source (select one)															
<input type="checkbox"/> Electric baseboard				<input type="checkbox"/> Electric ceiling or wall heat				<input type="checkbox"/> Electric furnace				<input type="checkbox"/> Natural gas furnace			
<input type="checkbox"/> Ductless heat pump				<input type="checkbox"/> Electric ducted heat pump				<input type="checkbox"/> Other							
Does home's <b>current</b> primary heating source serve at least 80% of the home's conditioned living space? <input type="checkbox"/> Yes <input type="checkbox"/> No															
<input type="checkbox"/> (Optional) I decline to receive additional energy-efficient product incentive information.															
How did you hear about cash incentives for energy-efficient products and services for your home? (select all that apply)															
<input type="checkbox"/> Friend/family				<input type="checkbox"/> Utility website				<input type="checkbox"/> Print ad				<input type="checkbox"/> TV/radio ad			
<input type="checkbox"/> Trade ally/store staff				<input type="checkbox"/> Other											

### Homeowner's Acceptance of Terms

I hereby certify that all information is accurate including claims of customer and equipment information. I confirm that the improvements I installed were not required by code. I understand that information related to the completeness of my application may be shared with contractors. I also understand that the status of my application may be shared with third parties on an aggregated basis. I have read all terms and conditions and acknowledge that Rocky Mountain Power may verify all the information provided. Incentive checks are paid to the Rocky Mountain Power account holder. Customers are responsible for payment to contractors.

**SIGN HERE** 

Customer signature

Date

## SECTION 2 - Trade ally completes and submits with section 1

### Trade Ally Information - Trade ally who installed the heat pump water heater completes this section

Trade ally business name

Mailing address

City

State

Zip Code

Technician's name

Daytime phone number

### Product & Installation Information - Section to be completed by installer of heat pump water heater

Installer of heat pump water heater  Homeowner  Program-eligible trade ally (trade ally must complete section 2)

Date work initiated

Date work completed

Model number

Serial number

Tier:  1  2  3

Indicate the location of the heat pump water heater installation (select one):

Garage  Unconditioned basement  Conditioned space  Other \_\_\_\_\_

Do installation, plumbing, drain lines, drain, ventilation and clearance comply with local code and manufacturer's installation instructions?

Yes  No

If the unit has been installed in a conditioned space does the installation comply with the guidelines and standards called out in the Utah Technical Specifications Manual ([rockymountainpower.net/ut-ta-resources](http://rockymountainpower.net/ut-ta-resources))?

Yes  No  Heat pump water heater was installed in unconditioned space

Was the heat pump water heater ducted?  Yes  No

If ducted, indicate the type of ducting:  Exhaust only  Intake only  Both exhaust and intake

### Trade Ally's Acceptance of Terms

I hereby certify that all information is accurate including claims of customer and equipment information. I have read all terms on this application and acknowledge that Rocky Mountain Power may verify all the information provided. Customer personal information and account number will not be shared with contractors or their representatives. The status of customer incentive applications that are missing required information or were not qualified may be shared only with the contractor or their representatives associated with each individual incentive application.



Trade ally signature

Date

### Resources

**Qualified Products List:** [rockymountainpower.net/ut-qpl](http://rockymountainpower.net/ut-qpl)

**Get your Rocky Mountain Power account number:** [rockymountainpower.net](http://rockymountainpower.net) or 1-888-221-7070

**List of program-eligible trade allies:** [rockymountainpower.net/ut-tradeallies](http://rockymountainpower.net/ut-tradeallies)

**Utah Trade Ally Manuals:** [rockymountainpower.net/ut-ta-resources](http://rockymountainpower.net/ut-ta-resources)

**IRS W-9 forms** (for business and non-individual customers, including landlords, applying for incentives): [irs.gov/pub/irs-pdf/fw9.pdf](http://irs.gov/pub/irs-pdf/fw9.pdf)

**Third Party Payment Addendum** (only for homeowners and other third-party entities not listed on account): [rockymountainpower.net/ut-addendum](http://rockymountainpower.net/ut-addendum)

**Incentive status:** Please allow six weeks plus mail service time for delivery. Track your incentive status at [rockymountainpower.net/ut-track-incentive](http://rockymountainpower.net/ut-track-incentive). You can also reach us at 1-800-942-0266, M-F, 8 a.m. to 6 p.m. (MST).

Mail complete applications, receipts, and other required documentation to:

**wattsmart Homes**  
**UT Plumbing**  
 818 S.W. Third Avenue #215  
 Portland, OR 97204-2405

## Terms & Conditions

Rocky Mountain Power offers incentives through a variety of programs that focus on energy efficient products. When you (the “Customer”) participate in these programs, you can save energy and money while reducing your impact on the environment. This application (“Incentive Application”) is intended to guide you through the steps necessary to receive an Incentive (“Incentive”) under the wattsmart Homes program (“Program”). The program is administrated by CLEAResult Consulting, Inc., a Texas corporation and/or an affiliate thereof (“CLEAResult”). The program may require engaging a qualified trade ally (“Trade Ally”) in order to qualify for Incentives. Customer is responsible for paying for all trade ally services.

**Incentive availability:** Incentives are available on a first-come, first-served basis according to the postmark date on the application. Please reference the program website at rockymountainpower.net/hes to determine the current status of incentive availability. All services must be purchased and installed prior to submitting an Incentive Application. Applications must include all information requested. Failure to provide this information may result in delays. If required information is not provided within 42 days of application submittal, the Incentive Application will be denied. Incentive will not exceed purchase price. Additional terms and conditions may apply. Incentives are subject to tariff approval and may change with 45 days of notice. Please visit rockymountainpower.net/hes for current program requirements.

**Qualifying customers:** Residential electric customers residing in the state of Utah who purchase their electricity from Rocky Mountain Power on rate schedules 1, 2, or 3 qualify. Landlords who own rental properties served by the company in the state of Utah where the tenant is billed on rate schedules 1, 2, or 3 also qualify for this program. You can find your rate schedule on your bill, by calling toll free 1-888-221-7070 or by logging in at rockymountainpower.net. Incentive checks will be issued in the name of the customer on the qualifying account. If you are a property owner, landlord, property management company or homeowner association and not listed on the account where qualified equipment was installed or services performed you must submit a completed Third Party Payment Addendum to receive incentive check(s) made payable to you.

**Customer responsibilities:** Customer agrees to indemnify and release CLEAResult, Rocky Mountain Power, their affiliates, officers and employees from all claims, demands, losses, damages, costs, expenses and liability (legal, contractual or otherwise), which arise from or are in any way connected with any: (1) injury to or death of persons, (2) injury to property of Customer; (3) violation of any applicable laws, statutes or ordinances, or (4) any act omission or negligence of the trade ally.

Customer will allow, if requested, a representative from CLEAResult, Rocky Mountain Power, or any authorized third party reasonable access to Customer's property for inspections, including but not limited to: (a) post-installation equipment inspection to check implemented measures and to verify compliance with the program requirements; and (b) post-operation inspection to verify energy savings of the measures after a period of operation; and (c) inspection for any other reason.

Customer also consents to CLEAResult's use of Customer's name, program services, and resulting energy savings in reports or other documentation. Customer will obtain the approval of the property owner where the measure is to be installed prior to installation if Customer is not the owner. Customer agrees that information collected in this application may be used for marketing purposes. In addition, Customer acknowledges that information included in this application may be subject to public records requests as required by law. Customer and CLEAResult shall comply with all applicable laws at all times. It is Customer's responsibility to obtain all licenses, permits or other approvals required for installation of products or measures under the program. Customer is solely responsible for proper disposal of any and all removed products.

Customer is solely responsible for the economic and technical feasibility, operational capability and reliability of Customer's installations, products and solutions. CLEAResult and Rocky Mountain Power make no representation or warranty and assume no liability with respect to services of any trade ally, quality, safety, performance or other aspect of any design, system or appliance installed pursuant to the program or this Incentive Application and expressly disclaim any such representation, warranty or liability. Under no circumstances shall CLEAResult or Rocky Mountain Power be liable for any monetary damages related to the program including any action or inaction of trade allies performing work under the program. All projected savings are intended to be estimates and CLEAResult and Rocky Mountain Power do not guarantee any level of savings. The customer hereby transfers to Rocky Mountain Power all environmental attributes (“Environmental Attributes”) attributable to program qualifying equipment or its operation. Environmental Attributes include any and all credits, benefits, emissions reductions, offsets and allowances, howsoever entitled, resulting from the avoidance of the emission of any substance to the air, soil or water at or by PacifiCorp generating facilities through reduced generation of energy or other savings or offsets on account of the qualifying equipment. The customer will not claim ownership of any Environmental Attributes. As long as the customer at the same time states the qualifying equipment was made possible with funding from Rocky Mountain Power, the customer may claim that it is facilitating the production of the Environmental Attributes attributable to the qualifying equipment.

**Jury waiver:** To the fullest extent permitted by law, each of the parties hereto waives any right it may have to a trial by jury in respect of litigation directly or indirectly arising out of, under or in connection with this agreement. Each party further waives any right to consolidate any action in which a jury trial has been waived with any other action in which a jury trial cannot be or has not been waived.

**Application timeline:** Incentive Application and required documents must be postmarked within 180 days of the service completion date. Incentive checks are issued within 45 days of receipt of the completed and approved Incentive Application. Incentives are not to exceed the purchase price of the equipment or service. Equipment and service work may be inspected for compliance. Incentives are subject to tariff approval and may change with 45 days' notice. Additional terms and conditions may apply.

**Application details:** If your application is selected for inspection, it will not be processed until the review is satisfactorily completed.

Rocky Mountain Power issues incentives in the form of checks not utility bill credits. Rocky Mountain Power is not responsible if your trade ally provides inaccurate information about the amount and/or conditions of the actual incentive and Rocky Mountain Power will not pay incentives for equipment that is mislabeled or misrepresented by trade allies regarding incentive qualifications. Households receiving incentives under the wattsmart Homes program may not receive equipment purchase and installation incentives under other Rocky Mountain Power company programs.

By providing Rocky Mountain Power with your e-mail address you agree that we may send you e-mails, occasional “breaking news” alerts and promotions from Rocky Mountain Power's wattsmart Homes program. We may also e-mail you occasionally with updates and information about the program. Should we elect to change our privacy policy we will post the changes at rockymountainpower.net/hes. Where the changes are significant, we may also choose to e-mail all our registered users with the new policy details.

Incentive Application must be postmarked within 180 days of the service completion date.