



2009 Rebate Application



Use this form for all COOL SMART Rebates including Early Replacement

CUSTOMER INFORMATION

Customer Name (Where equipment is located)

Electric Utility (Where equipment is located)
 NSTAR Electric National Grid MA National Grid RI

Electric Account # (Where equipment is located)

Street (Where equipment is located) Apt./Unit # City State Zip

Home Phone Business Phone Email Address

Customer/Owner Signature (REQUIRED) Date

Signature confirms that customer has read and accepts the terms and conditions of this rebate.

Name (Where rebate is to be mailed if different from above) **Tax I.D.#** (If owner is incorporated and rebate is over \$600):

Street Apt./Unit # City State Zip

Owner Phone Business Phone Email Address

CONTRACTOR INFORMATION

Company Name Contact Name/Title

Street City State Zip

Telephone Number Fax Number Email Address

Tech. NATE-Certified?
 YES
 NO

Contractor Signature (REQUIRED) Date

Signature confirms that this application is truthful and accurate.

REBATE FOR ENERGY STAR QUALIFIED SYSTEMS: INCLUDING EARLY REPLACEMENTS

The following rebates are available for residential central air conditioning equipment. This applies to split systems, mini-splits, and heat pumps that meet COOL SMART program criteria. NOTE: replacement systems may also qualify for a down sizing incentive.

Rebate Type	SEER ¹	EER ²	HSPF ³	Rebate (with Manual J sizing)*	Rebate (without Manual J sizing)*
Central AC/Heat Pump	14.5	≥ 12	8.2	\$500	\$300
Central AC/Heat Pump	15	≥ 12.5	8.5	\$600	\$400
Ductless Mini-split	14.5	≥ 12	8.2	N/A	\$500
Early Replacement Only	14.5	≥ 12	8.2	\$900*	N/A
Early Replacement Only	15	≥ 12.5	8.5	\$1000*	N/A

EARLY REPLACEMENT EXISTING EQUIPMENT 9 or 10 SEER ONLY (Source: Name Plate/Other)**

Must use a COOL SMART QIV-trained contractor

SEER	P Old Unit Size in Tons	Q Manufacturer	R Condenser Model #	S Coil Model #	T Age in Years

REBATES & APPLICATION CHECKLISTS

An application cannot be processed unless all requested information and documentation is provided. An incomplete application will be returned to the sender. (NOTE: two sided form)

ELIGIBILITY REQUIREMENTS

- Attach copy of customer invoice with equipment make, model, and size in tons and both coil and condenser model numbers and date and location of installation.
- Include customer's and contractor's signature with date.
- TXV or EXV valve Installed (REQUIRED to qualify for rebate).
- Provide AHRI #, SEER, EER, and (for heat pumps) HSPF.
- Use Preston Guide to verify old equipment is 9 or 10 SEER (Early Replacement ONLY).
- Pre & post QIV tests performed (Early Replacement ONLY).
- Manual J sizing attached (REQUIRED for \$200 additional incentive and for Early Replacement).
- If 3 or more systems installed for 1 electric account #, obtained COOL SMART pre-approval code. CODE: _____

\$250 FOR DOWN SIZING REPLACEMENT EQUIPMENT:

- Attach a copy of invoice showing model and size in tons and date of the installation.
- Attach Manual J calculations or provide measured system airflow in CFM to show how size was established.
- Obtained COOL SMART pre-approval code if the installed replacement system is 3 tons or greater. CODE: _____
- Include old unit nameplate tag OR two photos: 1) unit in place, showing the name; 2) close-up of nameplate

DOWN SIZING ONLY – 13 SEER AND ABOVE

Manual J calculation or measured airflow must be provided.

Old Unit Size In Tons*	Old Unit Age In Years	Customer and Contractor Incentives \$250 per ½ Ton Each†	
3.0	19	Customer \$250	Contractor \$250
		Customer	Contractor
		Customer	Contractor
		Customer	Contractor

†† Tonnage difference is rounded to the nearest half ton to determine incentive.

*Old unit nameplate tag must be cut off and submitted, OR two photos 1) unit in place, showing the name; 2) close-up of nameplate.



The power of action.

¹SEER – Seasonal Energy Efficiency Ratio. ²EER – Energy Efficiency Ratio is a measure of instantaneous cooling efficiency. ³HSPF – Heating Seasonal Performance Factor.

*or measured airflow equivalent. **Old unit nameplate tag must be cut off and submitted, OR two photos 1) unit in place, showing the name; 2) close-up of nameplate.

* Total amount to customer. No other rebate applies.

CHECK ONE

- New construction: ENERGY STAR Homes
 Replacement system
 Adding cooling to existing ductwork
 New construction
 Early system retirement
 New or additional ductwork and air conditioning



ENERGY STAR Quality Installation incentives also available.
Commissioning form required.
See www.mycoolsmart.com

NEW EQUIPMENT INFORMATION

A Install Date	B AHRI Reference #	C Manufacturer	D Condenser Model #	E Coil Model #	F TXV or EXV Installed** (required)	F1 Manual J Sizing	G AHRI-Rated SEER*	H AHRI-Rated EER*	I HSPF	J New Unit Size in Tons (Each)***	K Mini Split YES / NO	L Equipment Rebate Amount
(Example) 04/15/09	1419446	XYZ Co.	XYZ Co. Outdoor Unit Model: 4A7A5030A1	XYZ Co. Indoor Unit Model: 4TEE3D31A1	<input checked="" type="checkbox"/> YES	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	14.75	12	N/A	2.5	NO	\$500
					<input type="checkbox"/> YES	<input type="checkbox"/> YES <input type="checkbox"/> NO						
					<input type="checkbox"/> YES	<input type="checkbox"/> YES <input type="checkbox"/> NO						
					<input type="checkbox"/> YES	<input type="checkbox"/> YES <input type="checkbox"/> NO						

*AHRI SEER and EER rating of outdoor condenser and indoor coil working together. Rounding up of SEER/EER ratings is not acceptable. **Thermostatic Expansion Valve (TXV) or Electronic Expansion Valve (EXV) required for all systems. ***NOTE: 1 ton = 12,000 Btu/hour, needed for Right Sizing.

TERMS AND CONDITIONS

ENERGY STAR® EQUIPMENT REQUIREMENTS

System Requirements: All rebated Central Air Conditioning (A/C) units/systems or electric air source heat pumps must be ENERGY STAR qualified, listed with and certified by the Air Conditioning, Heating, and Refrigeration Institute (AHRI), and meet the program SEER, EER and HSPF requirements (see table on page 1). The A/C condenser and the evaporative coil must be new and replaced together. The condenser and coil are separate components in a split A/C or heat pump system and, for rebate purposes, these are considered one unit. For **mini split** ductless systems, for rebate purposes, the unit consists of outdoor coil 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, and date of purchase.

Information Sources to Verify ENERGY STAR Equipment: EER and SEER, and HSPF ratings (for heat pumps only) for condenser, evaporator and air handler (if applicable) must be provided. **Both the Consortium for Energy Efficiency (ceehvacdirectory.org) and the AHRI directory (ahridirectory.org) 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.

Quantity Limitations: Pre-approval for [rebate eligibility] is required if 3 or more systems are to be installed for one electric account number. Call Sharon at (508) 365-3260 for pre-approval code.

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 unit(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).

EARLY REPLACEMENT REBATE & MANUAL J LOAD CALCULATION REQUIREMENTS

Contractor receives \$100 for completing and submitting Manual J or Measured Air Flow data. COOL SMART recommends contractors comply with the 2007 ACCA HVAC Quality Installation Specifications (www.acca.org/quality). COOL SMART requires that ACCA or local code guidelines be followed for outdoor design temperature, with an allowance of 2°F (example: for Lowell, MA 88°F + 2°F = 90°F design temp.). The listed Manual J rebate levels in the chart and \$100 contractor incentive will not be paid if the design temperature difference (outdoor minus indoor) is greater than 15°F. The system must be sized to match ACCA Manual J — or sized to match the measured system airflow of the existing ductwork.

GENERAL REQUIREMENTS

Time Limit: Qualifying units for equipment rebate must be purchased and installed between January 1, 2009 and December 30, 2009. Applications must be postmarked by January 31, 2010. For new construction only, extension of 2009 offers up to the end of 2010 must be requested and approved in 2009. Program is subject to change without prior notice, including rebates and incentive levels.

Geographic Requirements: Offers valid only for residential customers in MA and RI where COOL SMART is offered by National Grid and NSTAR Electric. If you are an NSTAR Electric customer on Martha's Vineyard or Cape Cod, or a Cape Light Compact, WMECo or Unil customer, check with your service provider about program rebates.

Application Form: This application must be filled out completely, truthfully, and accurately. The customer and contractor must sign, date, and submit the completed application along with all required documentation for specific rebates and/or incentives.

Payments: From the time the application is processed and approved, please allow up to 30 days (60 days for Early Replacement) for payment. Payment processing may 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 and incentives; this right to access extends up to one year after date of application, even if rebates or incentives 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.

DOWN SIZING INCENTIVE

- Correctly sizing your system can reduce initial costs and significantly improve its performance. Note: Sizing calculations are required by MA and RI code but often not performed.
- **Down Sizing Only** — COOL SMART will provide an incentive of \$250 per half ton of downsizing to the contractor and \$250 per half ton of downsizing to the customer for replacement systems 13 SEER or greater. The system must be sized to match ACCA Manual J — or sized to match the measured system airflow of the existing ductwork. Pre-approval is required when the replacement system is 3 tons or more. Call Sharon at (508) 365-3260 for pre-approval code. Tonnage difference is rounded to the nearest half ton to determine incentive.
- Include old unit nameplate tag OR two photos: 1) unit in place, showing the name; 2) close-up of nameplate

CONTACT INFORMATION

For more information, visit: www.mycoolsmart.com
 Email: info@mycoolsmart.com
 Phone: 1-800-473-1105

MAIL TO

EFI COOL SMART Rebate Offer
40 Washington St., Suite 2000
Westborough, MA 01581



Energy Benefits: Customer agrees that the Energy Efficiency Program Provider (EPPP) 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 EPPP with such further documentation as the EPPP may request to confirm the EPPP's ownership of such benefits.