

PUD 1's Energy Equity Rebate Program Contractor Packet



ENERGY EQUITY
REBATE PROGRAM
MASON COUNTY PUD 1

Dear Contractors:

Thank you for participating in this program to help our customers install energy-efficient appliances in their homes. We appreciate your partnership.

Please complete one of the two attached rebate application forms, depending on which type of equipment is being installed. In addition to the rebate form, please also provide the following information:

1. L&I Permit Number and Approval Date
2. Before and After photos of the equipment installed. Make sure to attach the enclosed sticker to the equipment and include in one of the "after" photos.
3. Invoice addressed to customer, showing the PUD rebate applied.
4. Projects should not exceed \$6,000 for a ductless heat pump and \$9,000 for a ducted air source heat pump. Any costs exceeding these amounts must be justified and authorized by the PUD prior to work beginning or they will not be reimbursed.

The following electric service upgrades are also eligible if they are necessary for the installation of high-efficiency electric equipment:

1. Electrical service and panel upgrade
2. Electric wiring
3. Mechanical, Electrical, Plumbing improvements (MEPs)

Electrical service upgrades that cause the project to exceed the total project allowance amounts listed in #4 above should be submitted for pre-approval to the PUD prior to work beginning.

For qualifying reimbursements:

1. All equipment must be AHRI CEE Certified.
2. All equipment must be permanent or semi-permanent in nature and intended to stay at the address where installed.
3. Rebates must not exceed 100 percent of purchase and installation costs, taking into account any federal rebates from IRA, utility rebates, or other state funded rebates the project is utilizing.
4. All equipment that uses refrigerants must follow the statutory global warming potential (GWP) limits from the [Washington State Department of Ecology](#) and the [U.S. Environmental Protection Agency \(EPA\)](#), and where technically and economically feasible, must use low GWP refrigerants listed by the [EPA's Significant New Alternatives Policy \(SNAP\) Program](#), or the [California Air Resources Board \(CARB\)](#).

The PUD will review the submitted packet and reach out to the contractor with any questions or additional information required. Once the packet is approved, the rebate will be issued directly to the contractor.

If you have any questions, please contact Cassandra Steiger, PUD 1 Conservation Specialist at (360) 877-5249 or CassandraS@mason-pud1.org.

The Washington Families Clean Energy Credits Grant Program is supported with funding from Washington's Climate Commitment Act. The CCA supports Washington's climate action efforts by putting cap-and-invest dollars to work reducing climate pollution, creating jobs, and improving public health. Information about the CCA is available at www.climate.wa.gov.



PUD 1's Energy Equity Rebate Program Contractor Checklist



**ENERGY EQUITY
REBATE PROGRAM**
MASON COUNTY PUD 1

REQUIRED DOCUMENTATION TO BE SUBMITTED FOR REBATE:

- **Completed rebate form**
- **Before and after photos of installed equipment with at least one “after” photo showing the required Commerce sticker attached to the equipment.**
- **L&I permit number and approval date**
- **Completed W9**
- **Customer invoice showing PUD 1 rebate applied**

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ENERGY EQUITY REBATE PROGRAM MASON COUNTY PUD 1

Please Return Form To:

Mason County PUD No.1

21971 N. Highway 101

Shelton, WA 98584

Email: CassandraS@mason-pud1.org

Fax: (360) 877-9274

Ductless and Ducted Mini-Split Heat Pump (DHP) Project Installation Form

All sections must be filled out by the installer at the time of installation. A copy of this completed form and the purchase receipt or invoice must be promptly submitted to the homeowner's utility in accordance with utility policy.

All systems should:

1. Be installed according to the [Best Practices for Installing Ductless Heat Pumps Guide](#) in BPA's Energy Efficiency Document Library.
2. Be installed in accordance with manufacturer specifications, including adherence to proper refrigerant charging.
3. Meet local utility requirements.

Household Information

Customer Name		Customer Account Number	
Installation Address		City	State Zip
Year Built:	Total Heated Area of the Home: Sq Ft	Customer Phone	
Mailing Address, if different:			

What is Being Installed? (Select One)	Eligible Home Types (Select One)	Eligible Existing Heating System Being Displaced (Select One)
☐ Single Ductless Indoor Head ☐ Single Ducted Mini-Split ¹ ☐ Multiple Ductless Indoor Heads ☐ Multiple Indoor Ducted Mini-Splits ¹ Combination Ductless/Ducted Mini-Splits	☐ Existing Single-family ☐ Existing Manufactured ☐ New Manufactured (treated as manufactured existing once located on site for occupancy)	☐ Electric Forced Air Furnace ☐ Electric Zonal ²

¹ The Ducted Mini-Split option does not include whole-home centrally ducted systems

² Zonal heating includes electric, non-ducted: Ceiling cable, wall, baseboard, plug-in space heaters, and an electric boiler/water heater attached to a hydronic floor heating system.

Installation Information

AHRI Certified Reference #:		HSPF2 Rating*:	Installation Date:
Outdoor Unit Manufacturer:		Outdoor Unit Model(s) #:	
Associated Indoor Units	Indoor Unit Model Number(s)	Associated Indoor Units	Indoor Unit Model Number(s)
Indoor Unit 1:		Indoor Unit 3 (if installed):	
Indoor Unit 2 (if installed):		Indoor Unit 4 (if installed):	
Total Installed Cost (before rebates): \$ _____		Additional repair cost (if low income): \$ _____	

*If the unit only has a HSPF rating, please contact your utility for guidance on verification requirements

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ENERGY EQUITY REBATE PROGRAM

MASON COUNTY PUD 1

Ducted Air-Source Heat Pump Data Collection Tool

This form can be used to document installation information for homes converting to a ducted air-source heat pump (ASHP) and a ducted variable-speed heat pump (VSHP), or homes upgrading to a ducted VSHP. All sections must be completed by the installer at the time of installation.

Documentation to submit with this form:

- Copy of this completed form
- Purchase receipt or invoice, including the heat pump make and model number
- AHRI Certificate
- If the units has a variable-speed compressor, include manufacturer documentation that the outdoor compressor includes variable-speed or inverter driven technology (e.g. specification sheet, brochure, or screen shot). Note: Including the text "variable-speed" on the invoice will not satisfy this requirement. Additional documentation is required.)
- * Photos of Installed Equipment with CCA Sticker Affixed

Eligibility

- Available for existing single-family, existing manufactured homes, and single-family new construction (VSHP upgrade only).
- Heat pumps must be AHRI rated and meet current federal minimum standards for HSPF2 and SEER2.
 - *If the unit only has an HSPF and SEER value, please contact the utility for verification of eligibility*
- For a conversion to an ASHP or VSHP, existing heating system type must be an electric forced air furnace, with or without air-conditioning.
- For an upgrade to a VSHP, existing heating system can be a DHP, ASHP, Zonal electric, Wood/Oil/Propane/Gas, or no existing heating.

Site Information

Customer Name				Install Date	
Install Site Address			City	State	Zip
Home Type	Single Family New Construction*	Single Family Existing	Manufactured Existing (new manufactured homes are treated as existing once located at their site for occupancy)		Heated Area Sq Ft
Existing Heating System Being Replaced					
Electric Forced Air Furnace without AC		Electric Forced Air Furnace with AC		Electric Zonal	
Air Source Heat Pump*		Ductless Heat Pump*		Ground Source Heat Pump*	
Non -Electric Space Heating* (Wood/Oil/Propane/Gas)		No Heating*		*Single family new construction and noted existing heating types only available for VSHP Upgrade measure	

New Heat Pump Equipment Data

*Check with utility for efficiency requirements beyond current federal minimum standards

AHRI Certificate #	SEER2*	HSPF2*
Heat Pump Manufacturer	Outdoor HP Model #	Indoor HP Model #
Outdoor HP Capacity (tons) (optional)	Non-Variable Speed HP Compressor	Variable Speed (or inverter-driven) HP Compressor

Controls

HP Thermostat Make		HP Thermostat Model #
Auxiliary heat lockout does not engage at outdoor temperatures above 35°F or 5°F above balance point temperature?		
YES	NO	If no, what is the temperature setting?

Notes

Utility: Please include any additional documentation requirements here

Climate Commitment Act sticker must be affixed to the installed unit and a photo of the until with the sticker should be submitted as part of the invoice/reimbursement packet. A "before" installation and an "after" installation photo should both be included.

Any electrical panel upgrades to the customer's home that would cause the total price of the project to exceed \$9,000 must be submitted to Cassandra at PUD 1 for pre-authorization BEFORE undertaking the work. An estimate of cost overruns should include an itemized breakdown of labor, permitting and materials to justify the additional expense.

**Request for Taxpayer
Identification Number and Certification**

Go to www.irs.gov/FormW9 for instructions and the latest information.

Give form to the
requester. Do not
send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1	Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)	
	2	Business name/disregarded entity name, if different from above.	
	3a	Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate ☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. ☐ Other (see instructions) _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.)
	3b	If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐	
	5	Address (number, street, and apt. or suite no.). See instructions.	Requester's name and address (optional)
	6	City, state, and ZIP code	
7	List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-				-	
or									
Employer identification number									
				-					

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person	Date

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they