

# Homeowner Participation Form

# DUCTLESS HEAT PUMP PROJECT

To be completed by homeowner/utility account holder and installation contractor.  
 Answer the following questions based on your house prior to installation of the ductless  
 heat pumps(s). **All fields are required for approval.**

Official Use Only: Customer ID	
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## Contact Information

1. Homeowner name:		2. Name of company installing ductless heat pump:	
3. Home phone: ( ) -	4. Alternative phone: <input type="checkbox"/> Cell <input type="checkbox"/> Work ( ) -		5. Email address:
6. Site address:		7. City/ State/ Zip code:	8. County:
9. Homeowner mailing address: <i>(if different from site address)</i>		10. City/ State/ Zip code:	

## Homeowner Eligibility

11. The home has been occupied by the same person(s) as a primary residence for at least 12 months, and the same person(s) expects to occupy the home for 2 years post installation: <input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> <b>No</b> You are <u>NOT</u> eligible to participate in this project.
12. What type of primary electric resistance heat does the house have? <input type="checkbox"/> Zonal <sup>1</sup> <input type="checkbox"/> Electric hydronic		<input type="checkbox"/> <b>Electric furnace</b> If you have a furnace, you may or may not qualify for project participation. Verify your eligibility with your contractor and utility.
12a. If zonal, where are the heating units located (Check all that apply)? <input type="checkbox"/> Ceiling <input type="checkbox"/> Wall <input type="checkbox"/> Baseboard		
13. Does the home have a secondary heating system? <input type="checkbox"/> Yes <input type="checkbox"/> No		
13a. If yes, what type (mark one): <input type="checkbox"/> Freestanding stove <input type="checkbox"/> Fireplace <input type="checkbox"/> Other (describe): _____		<input type="checkbox"/> <b>Please note</b> Secondary heating systems are allowed only if electric resistance heating is used as primary heating system.
13b. If yes, what type of fuel (mark one): <input type="checkbox"/> Wood <input type="checkbox"/> Pellets <input type="checkbox"/> Propane <input type="checkbox"/> Kerosene <input type="checkbox"/> Oil <input type="checkbox"/> Other: _____		
13c. If yes, how much fuel (per year): _____ <i>(amount in cords of wood, pounds of pellets, gallons of propane/kerosene/oil, etc.)</i>		
14. Does the house have a natural gas meter? <input type="checkbox"/> No		<input type="checkbox"/> <b>Yes</b> If you have a natural gas meter at your house, you are <u>NOT</u> eligible to participate in this project.
15. How was the home constructed? <input type="checkbox"/> Site-built		<input type="checkbox"/> <b>Manufactured</b> If the home was manufactured, you <u>MAY</u> or <u>MAY NOT</u> qualify for this project. Verify your eligibility with your contractor and utility.
16. Which of the following describes the home? <input type="checkbox"/> Detached single-family house <input type="checkbox"/> Duplex <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex		<input type="checkbox"/> <b>Multi-family</b> If you live in a building with five or more dwelling units, you are <u>NOT</u> eligible to participate in this project.

## Site Information

17. Who occupies this home? <input type="checkbox"/> Homeowner <input type="checkbox"/> Renter		
18. Total number of occupants living in home: _____		
18a. Number of occupants under 18 years: _____ 18b. Number of occupants between 18-65 years: _____ 18c. Number of occupants over 65 years: _____		
19. Number of stories in house: _____		20. Number of bedrooms in house: _____
21. House/Unit square footage (If unknown, please estimate): _____		22. Year home was built (If unknown, please estimate): _____
23. Foundation type (check all that apply): <input type="checkbox"/> Basement <input type="checkbox"/> Crawlspace <input type="checkbox"/> Slab <input type="checkbox"/> Other _____		
24. Does the home have air conditioning? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, what type (mark one): <input type="checkbox"/> Central <input type="checkbox"/> Zonal (i.e. window and/or room A/C units), number of units _____ <input type="checkbox"/> Evaporative cooler (i.e. swamp cooler)		
25. Has your home been weatherized/insulated? <input type="checkbox"/> Yes <input type="checkbox"/> No		

<sup>1</sup> Zonal heating includes baseboard heaters, wall units (Cadet heaters), wall radiant, and ceiling cable heat.

V5: This form, subject to change, is effective from October 1, 2008 to September 30, 2009

Signature is required on reverse

Return completed form to:

**Northwest Ductless Heat Pump Project**

517 SW 4th Ave, Suite 400 • Portland, OR 97204 • Phone 503.808.9003

**Fax 503.808.9004 (preferred)**

## Terms and Conditions

**OFFICIAL FORM:** This form and any required additional documentation, including installation invoice, must be filled out completely, truthfully and accurately. The Northwest Ductless Heat Pump Project ("the Project") will not be responsible for lost documentation pertaining to the submission of this form. Project details, including incentives, are subject to change without prior notice.

**HOMEOWNER ELIGIBILITY:** To be eligible for Project participation and incentive payment, the resident must: (i) have occupied the home as their primary residence for at least the past year and expect to occupy the home for the next two years, (ii) allow their utility to make their billing history available to the Project for up to two years prior to and two years post installation, (iii) agree to participate in Project and evaluation activities, (iv) be an existing single-family home (4 units or less) (v) use permanently-installed electric resistance heating as primary source of heat and have the system installed throughout the house. In addition, a participating home cannot: (i) be new construction, (ii) have a fossil fuel central forced-air or fossil fuel hydronic heating systems, have ducted heat pump systems, (iii) have a natural gas meter, nor (iv) share its electric meter with another dwelling unit.

**SYSTEM ELIGIBILITY:** To be eligible for incentive payment, ductless heat pumps installed as part of the Project must be: (i) a split system heat pump employing an inverter-driven, variable speed compressor, a variable speed outdoor fan, and a multi-speed or variable speed indoor blower, and (ii) installed with the indoor unit in the main living area of the house. Additionally, indoor units using any type of field-installed duct system are NOT eligible.

**CONTRACTOR ELIGIBILITY:** Contractors must be licensed bonded and insured, have successfully completed manufacturer sponsored training for equipment being installed and the Project orientation.

**VERIFICATION AND INSPECTION:** Participating homes are subject to onsite inspections in order to verify that the system meets Project standards and that the home meets eligibility guidelines. Systems will be randomly chosen for onsite inspection, based on the number of completed installations by the contractor. No warranty is implied by this inspection.

**INCENTIVE PAYMENT:** The Project will approve utility incentive payment upon receipt of all complete and correct documentation. The Project will provide approved incentive payment information to the appropriate utility for payment. One incentive per residence is available regardless of the number of units installed in the home.

**FACSIMILE/SCANNED:** Facsimile transmission of any signed original document, and the retransmission of any signed facsimile transmission, shall be the same as delivery of the original signed document. Scanned original documents transmitted to the Project as an attachment via electronic mail shall be the same as delivery of the original signed document. At the request of the Project, the Participant shall confirm documents with a facsimile transmitted signature or a scanned signature by providing the original document.

**TAX LIABILITY:** Neither the Project nor the contractor is responsible for any tax liability, which may be imposed on the Participant as a result of payment of any incentives or as a result of obtaining financing.

**DISCLAIMER/NO LIABILITY:** The Participant understands that the Project is not supervising work performed for the Participant and is not responsible for proper completion of that work or proper performance of any products purchased. The Participant assumes the risk of any loss or damage in connection with installation. The Project does not guarantee any particular energy savings results by its approval of the installation.

**ENDORSEMENT:** The Project does not endorse any particular manufacturer, contractor, or product in promoting Ductless Heat Pumps. The fact that the names of particular manufacturers, contractors, or products may appear on Project materials does not constitute an endorsement. Manufacturers, contractors, or products not mentioned are not implied to be unsuitable or defective in any way.

**SAFETY AND BUILDING CODES:** The Participant agrees to pursue compliance with federal, state, and local building and environmental codes for the installation of this product. The contractor certifies products have been installed consistent with manufacturer instructions.

**PROPERTY RIGHTS:** The Participant must have proper authority to install the ductless heat pump system on the designated property, or has obtained any necessary consent from the landlord.

**ACCESS AND EVALUATION:** The Project and its representatives may request access to the property on which the ductless heat pump system was installed, to review and evaluate the system during and after Project completion. The Participant agrees to provide reasonable access to the property for the purposes described herein. In addition, the project may contact the participant for survey participation and project feedback.

**Billing Release** *To be filled out by the electrical utility account holder. Note: If the home is occupied by a tenant, or the account holder is different from the homeowner listed in the contact information, the billing release must be signed by the person whose name appears on the electric utility account.*

**INFORMATION TO BE RELEASED:** *The undersigned utility customer requests and authorizes the specified utility to release billing and usage information for the account listed below to the Northwest Ductless Heat Pump Project. With this authorization, the Ductless Heat Pump Project can request billing information for up to two years pre-installation and two years post-installation. The utility customer also hereby releases the utility company from any and all liability arising from or connected with providing this information.*

**26. Electric utility name:**

**27. Electric utility account number:**

**28. Account holder signature:**

**29. Account holder name:**

**30. Date:**

## Homeowner Signature

*By signing, the homeowner certifies that he/she is in compliance with the above terms and conditions.*

**31. Signature**

**32. Date**

**32. Where did you hear about ductless heat pump systems?**

Utility

HVAC Contractor

Door hanger

Radio

Newspaper

Other \_\_\_\_\_

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