



Ductless Heat Pump Installation Form

for existing Zonal Systems and Electric Forced Air Furnaces

Homeowner Name:		Utility Name:	
Site Address:		Site City / State / ZIP Code	
Homeowner Phone Number:		Homeowner Email Address:	
House/Unit Square Footage:		Year Home was built:	
Type of primary electric resistance heat in the home: Zonal <input type="checkbox"/> (See Note 1) Electric hydronic <input type="checkbox"/> (See Note 2) Forced Air furnace <input type="checkbox"/>			
Which of the following describes the home: Detached single-family <input type="checkbox"/> Duplex, triplex or fourplex <input type="checkbox"/> Manufactured Home <input type="checkbox"/>			
For DHP installation in homes with a Forced Air Furnace (FAF), which method was used to control the interaction between the DHP and FAF? No setback of FAF thermostat <input type="checkbox"/> FAF on, thermostat setback, DHP as primary <input type="checkbox"/> FAF off at thermostat <input type="checkbox"/> FAF off at breaker <input type="checkbox"/> Other <input type="checkbox"/> (please explain below)			
<small>The undersigned utility customer requests and authorizes the specified utility to release billing and usage information for the account listed below to the BPA or its agent. With this authorization, the BPA 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. The homeowner also agrees to the terms and conditions listed on the back of this form. Please contact your local utility to confirm program requirements before equipment is ordered.</small>			
Account holder signature:	Account holder name:	Date:	Electric utility account number:
Homeowner signature:			Date:
Where did you hear about ductless heat pump systems? In store (retail) <input type="checkbox"/> Family or friend <input type="checkbox"/> Door hanger <input type="checkbox"/> Newspaper <input type="checkbox"/> Internet ads <input type="checkbox"/> Social media <input type="checkbox"/> Radio <input type="checkbox"/> Utility bill insert <input type="checkbox"/> Utility website <input type="checkbox"/> Utility display unit <input type="checkbox"/> Direct mail <input type="checkbox"/> TV <input type="checkbox"/>			

Installation Information

Contractor company name:		Date of installation:	
Total installed cost, including: equipment, labor, electrical, tax, permit and other (prior to rebate)			\$
Total number of outdoor units installed:		Total number of indoor units installed:	
Outdoor unit manufacturer:	*Outdoor unit model number:	AHRI certified reference # (see note 3)	
Associated indoor units	Indoor unit model number(s)	Associated indoor units	Indoor unit model number(s)
Indoor unit 1 (in main living area):		Indoor unit 3 (if installed):	
Indoor unit 2 (if installed):		Indoor unit 4 (if installed):	
*Must be on BPA Qualified Product List			

Contractor Signature Release

By signing below, the contractor certifies that this invoice form and all accompanying documents are complete and accurate. The signature certifies that the contractor is licensed, bonded, insured, has been trained by the manufacturer of the installed product and has received Project contractor orientation. By signing this, the contractor has read and understood the terms and conditions listed on this form and/or Project information on the NW Ductless Heat Pump Project website (www.GoingDuctless.com).

Who is the best person to contact?		Email contact:	
Installer signature:	Installer name (print):	Date:	
Phone: () _____ - _____ Home <input type="checkbox"/> Cell <input type="checkbox"/>		Alternate phone: () _____ - _____ Work <input type="checkbox"/> Cell <input type="checkbox"/>	
<input type="checkbox"/> Yes, I have included a copy of the job sales invoice for proof of installation. <input type="checkbox"/> Yes, I have installed refrigerant line protection on entire length of exterior, insulated refrigerant lines (for details, see page 2) <input type="checkbox"/> Yes, I have installed the system in accordance with manufacturer specifications, including adherence to proper refrigerant charging. <input type="checkbox"/> Yes, I have all required licenses, registrations, certifications and permits for the work performed at the site address on this form.			

PLEASE RETURN THIS FORM TO: Kittitas PUD, 1400 Vantage Hwy, Ellensburg WA 98926- kelly.carlson@kittitaspud.com – (509) 933-7188



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TERMS AND CONDITIONS

OFFICIAL FORM: This form and any required additional documentation, including installation invoice, must be filled out completely, truthfully and accurately. Project details, including incentives, are subject to change without prior notice.

CONTRACTOR'S RESPONSIBILITY: It is the responsibility of the Contractor to fully fill out this form at the time of installation, and to ensure this form has been signed by both the contractor and homeowner.

HOMEOWNER ELIGIBILITY: To be eligible for incentive payment, the home must have permanently installed electric resistance heat as the primary heating system. Qualifying applications are Single Family Homes with zonal electric heat, Single Family Homes with electric force air furnaces, and Manufactured Homes with electric forced air furnaces. A qualifying home cannot: (i) be new construction, (ii) have a fossil fuel central forced air or fossil fuel hydronic heating system, nor (iii) have a ducted heat pump system.

SYSTEM ELIGIBILITY: To be eligible for incentive payment, ductless heat pumps installed must be: 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. Additionally, indoor units using any type of field installed duct system are NOT eligible.

CONTRACTOR ELIBILITY: Contractors must be licensed, bonded and insured, have successfully completed manufacturer sponsored training for equipment being installed and have attended an orientation provided by the NW Ductless Heat Pump Project (the Project) available at <http://goingductless.com/partners/contractors>.

CONTRACTOR REMOVAL: Non-compliance with installation specifications and/or Quality Assurance Inspections may trigger a performance review of the installation contractor. This review will be conducted by the NW Ductless Heat Pump Project Quality Assurance team. The performance review may result in suspension or permanent removal from participation. Findings of the performance review will be communicated, in writing, to the installation contractor and participating utility along with terms of suspension or removal.

VERIFICATION AND INSPECTION: Participating homes are subject to random onsite inspections in order to verify that installations meet Manufacturer specifications and that the home meets eligibility guidelines. You may be contacted by phone or email to schedule an inspection. No warranty is implied by this inspection.

TAX LIABILITY: Neither the utility, BPA, 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.

ENDORSEMENT: The NW Ductless Heat Pump 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 and 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.

PROPERY 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.

REFRIGERANT LINE PROTECTION: At the time of installation, contractor must protect all exterior, insulated refrigerant lines. Protection is either UV resistant tape wrapped around insulated refrigerant lines or rigid line hides installed over insulated refrigerant lines.

NOTES:

- 1 Zonal heating includes electric, non-ducted: ceiling cable, wall, baseboard and an electric boiler/water heater attached to a zoned hydronic.
- 2 Single Family and Manufactured Homes with an electric forced air furnace qualify for the Bonneville Power Administration Program, effective April 1, 2013. However, installations in these housing types may not be supported in your specific utility territory. Please check with your electric utility for eligibility. Multifamily residences and manufactured homes with zonal electric heat ay qualify for a utility rebate, but currently do not qualify for the Bonneville Power Administration Program. Please check with you electric utility for eligibility.
- 3 List Discontinued models, for which an AHRI# is not listed as "Discontinued". List new models that have been submitted for review and approval, for which an AHRI# is not available as "Pending".

Request for Taxpayer Identification Number and Certification

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

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

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> 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 FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	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. Also see *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:

- 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
- 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
- I am a U.S. citizen or other U.S. person (defined below); and
- 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.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.