



Otsego Electric Cooperative, Inc.

A Touchstone Energy® Cooperative

Otsego Electric Cooperative, Inc.

Clean Heat Incentive Program

PO Box 128, Hartwick, NY 13348

(607) 293-6622

New qualifying equipment installed from 01/01/2026 to 12/31/2026 are eligible for the following incentives contingent upon availability of funds. New equipment must be installed at the primary residence of the property owned by a member with an active year-round electric account and address listed on this application. To qualify and apply:

- 1) Please contact Otsego Electric Cooperative, Inc. when planning your project to verify the availability of funds. Otsego Electric is a not-for-profit electric cooperative and has a limited annual budget for qualifying projects. Failure to contact Otsego Electric may result in your application being rejected due to fund availability.
- 2) Verify that the equipment you will be purchasing meets the minimum eligibility requirements listed on this application.
- 3) Purchase the qualified equipment and have a participating contractor install it.
- 4) Submit your completed application, invoice, manual J/S commissioning checklist or GS completion form to: **Otsego Electric Cooperative, Inc., P.O. Box 128, Hartwick, NY 13348**
 - o Make Sure your invoice includes:
 - Equipment & Quantity installed including load calculations if applicable
 - Installer name and address
 - Equipment and installation costs
 - Manufacturer and model number of indoor and outdoor equipment (Please include the AHRI #)
 - "Paid in full" or "zero balance"
 - Installation date and location
 - Incentive amount payable to Member and/or contractor. Incentives payable will be calculated using the associated NEEP AHRI # at 5 degrees Fahrenheit.

MEMBER/ACCOUNT HOLDER INFORMATION									
Electric Account # at Installation Address:									
Account Holder First Name:					Account Holder Last Name:				
Installation Address (Physical Address, City, State, Zip):									
Mailing Address (if different):									
Email Address:		Phone #:							
Date Qualifying Equipment was Installed and Operational:									
CONTRACTOR INFORMATION (This information must also appear on the contractor invoice) (Please attach W9)									
Contractor Company Name:					Company Contact Name:				
Company Address (Physical Address, City, State, Zip):									
Mailing Address (if different):									
Email Address:		Phone #:							
GSHP DESIGNER INFORMATION (This information must also appear on the contractor invoice)									
Contractor Company Name:					Company Contact Name:				
Company Address (Physical Address, City, State, Zip):									
Email Address:		Phone #:							
GSHP DRILLER INFORMATION (This information must also appear on the contractor invoice)									
Contractor Company Name:					Company Contact Name:				
Company Address (Physical Address, City, State, Zip):									
Email Address:		Phone #:							

EXISTING HEATING & COOLING EQUIPMENT:

- Existing heating and cooling systems must be removed in their entirety to be eligible for the full incentive amount. If the existing heating or cooling source is not removed in its entirety or a supplemental heating or cooling system is left in place, the total incentive will be reduced by 50%.

Installed Equipment Will:

Replace Existing System (Whole Building) Supplement Existing System (Partial Building) New Construction

Existing Heating System Fuel Source:

Oil Propane Electric (Resistance) Natural Gas Wood Other _____

Building Type:

Residential Multi-Family Small Commercial

INCENTIVES AVAILABLE:

Project incentive amounts are payable directly to Otsego Electric Cooperative's (OEC) member, unless the participating contractor and OECs member jointly request that the project incentive be paid to the participating contractor by utilizing the member acknowledgement located on page 4.

CATEGORY	DESCRIPTION	TARGET SEGMENTS	ELIGIBLE TECHNOLOGIES	ELIGIBILITY CRITERIA
1	Cold Climate ASHP ("ccASHP"): Partial Load Heating	Residential, Multi-Family, Small Commercial	Minisplit Heat Pump ("MSHP"), Central ccASHP	<ul style="list-style-type: none"> Each unit in system must be on the Northeast Energy Efficiency Partnership ccASHP Product List ("NEEP Product List") Total heat pump system heating capacity is <300,000 British Thermal Units per hour ("Btu/h") For central ASHPs installed with a back-up furnace in the same cabinet, the back-up furnace must have capacity <225,000 Btu/h Total heat pump system heating capacity satisfies <90% of the building's design heating load ("BHL")
2	Cold Climate ASHP ("ccASHP"): Full Load Heating	Residential, Multi-Family, Small Commercial	Minisplit Heat Pump ("MSHP"), Central ccASHP	<ul style="list-style-type: none"> Each unit in system must be on the NEEP Product List Total heat pump system heating capacity is <300,000 Btu/h. For central ASHPs installed with a back-up furnace in the same cabinet, the back-up furnace must have capacity <225,000 Btu/h Total heat pump system heating capacity satisfies at least 90% of the BHL. Systems sized for >120% BHL may incur further review and require justification. In cases where there are four or fewer units choosing heat pumps in a Multifamily building, they shall be eligible to apply in Category 2 subject to the discretion of the utility.
3	GSHP: Full Load Heating	Residential, Multi-Family, Small Commercial	GSHP	<ul style="list-style-type: none"> Each heat pump in the system must meet or exceed the ENERGY STAR Geothermal heat pump specification. Console units and non-console heat pump appliances with less than 24,000 Btu/h rated full load cooling whose performance does not meet or exceed ENERGY STAR specifications must apply for incentives under Category 4. Total heat pump system heating capacity is <300,000 Btu/h, except for systems installed in multifamily buildings, which all must apply through Category 4 Ground source variable refrigerant flow heat pumps ("GSVRFs") are eligible for incentives in Category 3 if the total heating capacity is <300,000 Btu/h. GSVRF systems, regardless of total heating system size or individual appliance cooling capacity, must meet or exceed the minimum efficiencies listed in Table 6. System consists only of individual appliance cooling capacity for open-loop and closed-loop GSHP installs <135,000 Btu/h and/or individual appliance cooling capacity for direct exchange GSHP installs ≤180,000 Btu/h

3 Cont..	GSHP: Full Load Heating	Residential, Multi-Family, Small Commercial	GSHP	<ul style="list-style-type: none"> Ground loops must comply with applicable New York Department of Environmental Conservation ("NY DEC"), and International Ground-Source Heat Pump Association ("IGSPA") standards Total heat pump system heating capacity satisfies at least 90% of the BHL. Systems sized for >120% BHL may incur further review and require justification.
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WATER HEATING

4	HPWH <120 Gallons of Tank Capacity	Residential, Multi-Family, Small Commercial	HPWH	<ul style="list-style-type: none"> HPWHs with tank capacities up to 120 gallons must meet or exceed ENERGY STAR Residential Water Heater specifications
5	HPWH >120 Gallons of Tank Capacity	Multi-Family, Large C&I	HPWH	<ul style="list-style-type: none"> HPWHs with tank capacities greater than 120 gallons must meet or exceed ENERGY STAR Water Heater specifications
6	GSHP Desuperheater	Residential, Multi-Family, Small Commercial	Optional component to GSHP systems	<ul style="list-style-type: none"> Installed as integrated component in an eligible GSHP
7	Dedicated Domestic Hot Water ("DHW") Water-to-Water Heat Pump ("WWHP")	Residential, Multi-Family, Small Commercial	Dedicated DHW WWHP (<120 gallons) added to ground loop	<ul style="list-style-type: none"> Can be integrated into an eligible GSHP or installed as a separate WWHP meeting or exceeding ENERGY STAR Geothermal specifications Must meet 100% of water heating load
8	Simultaneous Installation of Space Heating & Domestic Water Heating	Residential, Multi-Family, Small Commercial	HPWH plus others	<ul style="list-style-type: none"> Category 2 ccASHP: Full Load Heating project that opts to add on a HPWH meeting the criteria in Category 5

TOTAL INCENTIVES: Total member incentives payable must be filled out. Total incentives payable cannot exceed \$2,500 per member.

CATEGORY	TECHNOLOGY	OEC MEMBER INCENTIVE	QUALIFYING UNITS/BTU'S	MEMBER INCENTIVE PAYABLE
1	Cold Climate ASHP ("ccASHP"): <u>Partial Load Heating (<90% BHL)</u>	\$500/Outdoor Condenser Unit		\$
2	Cold Climate ASHP ("ccASHP"): <u>Full Load Heating (>90% BHL)</u>	\$750/10,000 Btu/h of maximum heating capacity at NEEP 5°F		\$
3	GSHP: <u>Full Load Heating (>90% BHL)</u>	\$1,500/10,000 Btu/h of full load heating capacity as certified by AHRI		\$
4	HPWH <120 Gallons of Tank Capacity	\$700/Unit		\$
5	HPWH >120 Gallons of Tank Capacity	\$80/ MMBtu of annual energy savings		\$
6	GSHP Desuperheater	\$100/Unit		\$
7	Dedicated Domestic Hot Water ("DHW") Water-to-Water Heat Pump ("WWHP")	\$900/Unit		\$
8	Simultaneous Installation of Space Heating & Domestic Water Heating	\$250/Additional bonus per combination installation		\$
** TOTAL INCENTIVES PAYABLE CANNOT EXCEED \$2,500 PER MEMBER **				TOTAL INCENTIVES PAYABLE
				\$

WORK COMPLETION & REBATE VALIDATION			
	<p>I hereby request a rebate for the listed work. Attached are copies of all receipts. I certify that all information above is correct to the best of my knowledge and that I have read and agree to all Terms and Conditions of the rebate. I certify that a participating contractor has installed the listed energy efficient equipment in accordance with Program Guidelines and Terms and Conditions as described on this form and the equipment will not be removed and taken to another property; if the equipment is removed without prior notice to OEC, we reserve the right to recover this rebate. Member may not apply for or receive multiple incentives for the same project from another gas or electric utility. Program offerings are subject to change without notice. I understand that some restrictions may apply. Otsego Electric Cooperative, Inc. reserves the right to conduct field inspections to verify installations.</p>		
Date:	Member Name:		Member Signature:
Date:	Contractor Name:		Contractor Signature:
(OPTIONAL) REQUEST FOR DIRECT PAYMENT TO CONTRACTOR:			
	<p>I hereby request that payment of the total incentive be paid directly to the contractor in lieu of direct payment to the Member. OEC's member has received the full project incentive amount as a reduction of the invoiced amount. (Invoice must be attached showing amounts paid including incentive reduction). All work has been completed in full and has been deemed satisfactory by the Member.</p>		
Date:	Member Name:		Member Signature:
Date:	Contractor Name:		Contractor Signature:

TERMS AND CONDITIONS:

- 1) Attestation – I hereby request a rebate for the listed work. Attached are copies of all receipts. I certify that all information above is correct to the best of my knowledge and that I have read and agree to all Terms and Conditions of this rebate. I certify that a qualified installer has installed the listed energy efficient equipment in accordance with Program Guidelines and Terms and Conditions as described on this form. This rebate is for the benefit of New York Residential electric Members of Otsego Electric Cooperative, Inc. (OEC) Members may not apply for or receive multiple incentives for the same measure from another gas or electric utility. Program offerings are subject to change without notice. I understand that some restrictions may apply. OEC reserves the right to conduct field inspections to verify installations. I acknowledge that OEC, its company partners, New York agencies and authorities may use this information and my attestation to determine whether a rebate will be issued. I understand that any omissions, misrepresentations, or inaccuracies on this application may be a basis for a rebate denial and I assume full liability for any misrepresentations I make regarding this application.
- 2) Member Eligibility – Eligible Members must be a year-round electric Member of OEC with an active utility account and be the bona fide owner of a property served by Otsego Electric Cooperative. Each Member must provide a valid utility account number. Member must notify OEC before a contract is executed and work begins.
- 3) Submission Deadline – Rebate applications must be filled out completely, signed, accompanied by dated itemized receipt(s) and proof of ownership (when necessary). All rebated equipment must be installed at the time of the application date.
- 4) Equipment Eligibility – A participating contractor must install the Heat Pump. OEC will not pay for any heat pump that is not listed in the program documents or application. There will be no substitute heat pump unless the substitute is approved by OEC in advance of installation. All heat pumps must be installed in conformance with federal, state, and local code requirements.
- 5) Double Dip – OEC members may not apply for or receive multiple incentives for the same measures from another gas or electric utility or NYSERDA.
- 6) Changes to Residential Rebate Program, Program Changes – OEC reserves the right to change, modify, or terminate this program at any time without any liability except, as expressly stated herein. OEC will honor all written commitments made to the Member prior to the date of any change, modification, or termination of this program, provided the installation of the heat pump is completed prior to the date of such change, modification, or termination. Correction requests to rebate applications that have already been processed and paid must be

made within 30 days of the date the rebate check was mailed to the Member (or contractor). Correction requests received after 30 days from the mail date of the rebate check will not be honored.

- 7) Contractor Verification – Eligible equipment must be installed by a contractor associated with the NYS Clean Heat Statewide Heat Pump Program, except for heat pump water heaters.
- 8) Warranties – (a) the Member may have other warranty rights that may be provided by the manufacturer of the heat pump materials installed under the program. Members may exercise such rights only against the manufacturer, and not against OEC or its affiliates. (b) OEC disclaims all expressed or implied warranties or guarantees that the installation, use or operation for any heat pump will result in any level of savings or result in any measurable energy-related benefit. (c) OEC does not endorse, guarantee, or warrant any manufacturer or product. OEC disclaims all warranties whether express or implied (including, without limitation, warranty of merchantability and fitness for particular purpose) for any product or service in connection with the program.
- 9) Property Rights – Rebate applicants hereby represent and warrant that they own the property, are members of OEC, and all owners have signed the Rebate Application. If you are a landlord and own the property where the equipment is to be installed, you must contact OEC to request a rebate application. You must also provide proof of ownership (such as a deed and/or utility bill) that includes the address where the eligible equipment is to be installed.
- 10) Tax Liability – OEC is not responsible for any taxes which may be imposed on the Member as a result of the heat pump being installed or for the member's participation in the program.
- 11) Liability & Release, Limitation of Liability – OEC and its affiliates shall have no liability whatsoever in connection with the program and the heat pump installation or operation. Rebate recipients hereby release and shall indemnify and hold harmless OEC for any damages in contract, tort (including negligence), or otherwise cause by any activities associated with these Terms and Conditions or the Program. In no event shall OEC be liable for any consequential, special, or incidental damages.
- 12) Member Information – The member hereby authorizes OEC to release their energy use information to energy efficiency program administrators and/or designees, including the New York Power Authority, State Energy Research & Development Authority (NYSERDA), and Heat Smart program understands that such information will be kept confidential and used only for the purpose of the program evaluation, determining program availability and approximate energy savings and carbon reduction. The member agrees that OEC may provide Member information including name, address, account number, energy consumption data and energy savings to a third-party contractor for evaluation purposes. Such third-party contractor shall keep Member information confidential. Member information may also be provided to federal and state governmental and regulatory agencies directly involved in this program.
- 13) Installation Verification/Consent and Visits to Residence – (a) the Member agrees to provide OEC access to the residence for pre-installation, installation, and follow-up visits only to verify installation and operation of the unit installed. Advance notice will be given to the member before inspections at a time convenient for the member (b) The member understands that the purpose of the follow up visit(s) is to provide OEC with an opportunity to review the operation of the heat pumps for program evaluation purposes only. Such inspections or follow up visits do not include any type of safety review. (c) OEC is under no obligation to: (i) make follow up visits, (ii) review the operation of the heat pump or (iii) make suggestions of any kind to the Member.
- 14) Disputes – OEC will have sole discretion to decide on the final resolution of any program issues, including but not limited to program eligibility requirements or incentives.
- 15) Misc. (a) The application, these Terms and Conditions, and the Program materials make up the entire agreement between the OEC and Member and supersedes all other communications and representations. In the event of a conflict between these Terms and Conditions and any Program materials, these Terms and Conditions shall govern. (b) The member acknowledges that the program contractors or subcontractors performing services related to the program are not authorized to make any agreement or representation on behalf of OEC, and that OEC will be bound only by an authorized representative of OEC. (c) There shall be no amendment or modification to these Terms and Conditions or any Program materials unless such is made by OEC. (d) Except to the extent expressly stated in this Agreement, these Terms and Conditions do not grant any right to any third parties. (e) These Terms and Conditions are governed by the laws of the State of New York and the venue is Otsego County.