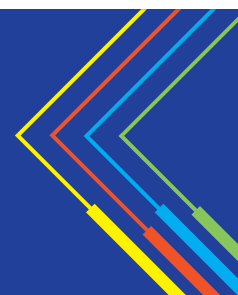


# New York State Clean Heat Rebate Application: Customer and Contractor Acknowledgment Form National Grid



*\*This form is only to be filled out by **customers** participating in the Clean Heat Program and not to be filled out by contractors. Customers are encouraged to request contractor assistance as needed. Falsified information or signatures will result in denial of rebate and/or other action pursuant to applicable law and Clean Heat program rules.*

Congratulations on your decision to participate in the New York State Clean Heat Program. In order to be eligible for an incentive from National Grid, please review and acknowledge the following information:

## All Fields Required

Customer		
Name:	Address:	Phone Number:
Mailing Address (if different from Address):	National Grid Electric Account Number:	
Participating Contractor		
Name:		

## Proposed Project Information

Proposed System Type (check all that apply)	Proposed Cost Structure	Rebate Payment Option Selected (check one)
<input type="checkbox"/> Full Load Mini-Split or Central Air-Source Heat Pump System  <input type="checkbox"/> Full Load Ground-Source Heat Pump System  <input type="checkbox"/> Custom Air-, Ground-, or Water-Source HP System <input type="checkbox"/> Residential Heat Pump Water Heater (up to 120 gallons)  <input type="checkbox"/> Commercial Heat Pump Water Heater ( > 120 gallons) <input type="checkbox"/> Ground-Source Heat Pump Desuperheater <input type="checkbox"/> Dedicated Water-to-Water Domestic Water Heater	<b>Total Project Cost</b> (combined equipment and labor, based on <u>final</u> invoice after projection completion and testing):  \$ _____  <b>NYS Clean Heat Rebate</b> (calculated based on Clean Heat manual and program rules):  \$ _____  <b>Total to be Paid by Customer</b> (Total Project Cost minus contractor rebate and portion of rebate assigned to contractor via Instant Discount, if applicable):  \$ _____	<input type="checkbox"/> Instant Discount Provided by Contractor  <input type="checkbox"/> Mail Customer a Check to Mailing Address designated on this form <input type="checkbox"/> Mail a check to Other Third-Party Payee Company: _____  Contact: _____ Street Address: _____ City: _____ State: _____ ZIP: _____  Email: _____ Phone: _____

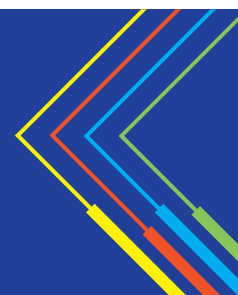
## Status of Existing Heating System—The existing heating system will be (check one):

- |  |  |
|--|--|
| <input type="checkbox"/> Removed by Contractor<br><input type="checkbox"/> Decommissioned by Contractor <sup>2</sup> | <input type="checkbox"/> Left in Place<br><input type="checkbox"/> Not Applicable (New Construction or No Prior Existing System) |
|--|--|

## Customer Education and Information (check all that apply)

- |   |   |
|---|---|
| <input type="checkbox"/> Contractor shall configure the NYS Clean Heat-eligible equipment installed in this project to be the primary heating source in all spaces into which it is installed.<br><input type="checkbox"/> Contractor shall educate the customer on the objective of the Clean Heat Program to minimize the use of heating fuels, and about how to operate and maintain the installed system as the primary heating system. | <input type="checkbox"/> Contractor shall provide customer with printed product warranty, operation and maintenance, as well as Contractor contact information. |
|---|---|

# New York State Clean Heat Rebate Application: Customer and Contractor Acknowledgment Form National Grid



I certify that the heat pump heating system is fully operational and all known issues with the equipment or installation have been resolved by the installing contractor or manufacturer to the Customer's satisfaction at this time. Yes \_\_\_ No \_\_\_

Contractor signature \_\_\_\_\_

Customer signature \_\_\_\_\_

## Customer Acknowledgment

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 agree to payment of the Rebate (if Project is deemed eligible) to the parties set forth in the Rebate Payment Option above. Customers may not apply for or receive multiple rebates for the same measure (meaning, same equipment) from another gas or electric utility, or through other National Grid programs. National Grid reserves the right to conduct field inspections to verify installations and system functionality and compliance with Program Rules.

**I acknowledge that National Grid, their Implementation Vendors, New York agencies, and authorities will use this information, and additional supporting documentation to be submitted by the installing Contractor, together with my attestation to determine whether a rebate will be issued, and that such information may also be used for other purposes as set forth below. I further acknowledge that National Grid or its representatives or designees may contact me to ask about my experience participating in this program or using my heat pump.**

**I have read and agree to the terms and conditions below for Customers participating in the Program.**

Customer Signature \_\_\_\_\_

Date \_\_\_\_\_

<sup>1</sup> Customer acknowledges that the rebate amount is subject to change based on project review by National Grid, or its agents.

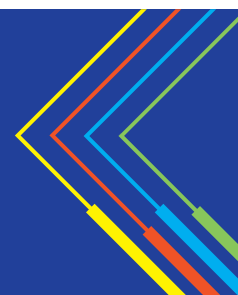
<sup>2</sup> Customer acknowledges applicable jurisdictional programs, codes, and requirements (e.g., federal, state, municipal, etc.) that govern decommissioning and disposal of heating systems and fuel storage tanks.

## Contractor Acknowledgment

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. Further, I certify that I am familiar with the Clean Heat Participation Agreement<sup>3</sup> terms and conditions signed on behalf of my company, and the Clean Heat Program Manual and Program Rules<sup>4</sup> as applicable to this Project. I certify that the Project and all supporting documentation and calculations are in accordance with the Clean Heat Program Manual and Program Rules. I acknowledge that this rebate is for the benefit of New York electric customers of National Grid as shown in the Rebate Payment Option above. Customers may not apply for or receive multiple rebates for the same measure (meaning, same equipment) from another gas or electric utility, or through other National Grid programs. National Grid reserves the right to conduct field inspections to verify installations and system functionality and compliance with Program Rules.

**I acknowledge that National Grid, their Implementation Vendors, New York agencies, and authorities will use this information, and additional supporting documentation to be submitted by the installing Contractor, together with my attestation to determine whether a rebate will be issued, and that such information may also be used for other purposes as set forth below. I further acknowledge that any information submitted in connection with this application may be provided to the Customer.**

# New York State Clean Heat Rebate Application: Customer and Contractor Acknowledgment Form National Grid



**I have read and agree to the terms and conditions below.**

\_\_\_\_\_  
Contractor Signature

\_\_\_\_\_  
Date

<sup>1</sup> Contractor acknowledges that the rebate amount is subject to change based on project review by National Grid, or its agents.

<sup>2</sup> Contractor acknowledges applicable jurisdictional programs, codes, and requirements (e.g., federal, state, municipal, etc. that govern decommissioning and disposal of heating systems and fuel storage tanks.

<sup>3</sup> Participation Agreement can be found here: <https://nystatewidecmp.customerapplication.com/>

<sup>4</sup> The program manual can be found here: <https://cleanheatconnect.ny.gov/nys-clean-heat-materials/>

## **Required Customer Acknowledgement for Instant Discount / Instant Rebate**

I am the Account Holder of the National Grid account listed above.

By designating the “Instant Rebate” option in the Proposed Project Information Section of this form, above, I am indicating that I authorize and request the Instant Rebate amount listed above to be paid directly to the Contractor.

The Instant Rebate incentive will be deducted from the purchase price of the qualifying equipment and service(s) as indicated on the final invoice. The Account Holder (Customer) agrees to an Instant Rebate to be paid by National Grid (or via its Implementation Vendor, ICF) directly to the participating contractor performing the work at the designated service address.


Please contact National Grid’s Clean Heat Implementation Vendor at **(844) 212-7823** or email **[NYSCleanHeat@icf.com](mailto:NYSCleanHeat@icf.com)** if you have any questions or need assistance with filling out this form, or regarding your participation in the Clean Heat program.

**nationalgrid**



## Customer Terms and Conditions

1. **Rebates:** Subject to these Terms and Conditions, this program is offered by Niagara Mohawk Power Corporation d/b/a National Grid (the "Company" or "National Grid"). The Company, through its contractual vendor (the "Vendor") will pay rebates to eligible customers in the Company's Service Territory, for the purchase and installation of the equipment/products described in this literature and within this application.
2. **Customer Eligibility:** New qualifying equipment installed from January 1, 2020, to December 31, 2025, is eligible, contingent upon availability of funds. Eligible customers must be an electric customer of National Grid with an active utility account or have proof of ownership of a property served by National Grid. Each Customer must provide a valid utility account number. Customers who receive a Clean Heat rebate are not eligible to receive a High Efficiency Heating Equipment rebate.
3. **Customer Information:** National Grid may use the information provided herein and by the participating Contractor(s), including name, address, account number, fuel type, building type, and equipment installed, together with Customer's energy consumption data and energy savings (collectively, "Customer Information"), to determine whether a rebate will be issued. Customer of National Grid agrees and authorizes the utility's sharing of the participant-customer's information and/or project-level information with New York State Department of Public Service Staff and NYSEERDA, including its agents or authorized representatives, consistent with NYSEERDA's New York State Public Service Commission and statutorily authorized responsibilities, including, but not limited to, supporting market development initiatives, and other evaluation and measurement activities. (For clarity, the term "project level" includes the information based on the scope of the project, including, but not limited to, aggregated and anonymized whole building, building or subsets of the project.) Such information will be kept confidential and used only for the limited purposes of Program evaluation, making Program improvements, and determining Program eligibility and energy savings during the term of the Clean Heat Program (currently anticipated to be January 1, 2020, to December 31, 2025). Customer information may also be provided to federal and state governmental and regulatory agencies to the extent required by law. Customer information will be provided in aggregated or anonymized format (combined with that of other customers so that individual information is not revealed) or provided under a request for protective treatment.
4. **Post-Installation Work Verification:** The Company reserves the right to perform a verification of the specified installation. If the Company and/or Vendor determines that the equipment was not installed in a manner that is consistent with program guidelines, the Company and/or Vendor may require that the installation be modified before making any rebate payments. The cost of such modifications is the responsibility of the customer. The Customer hereby authorizes the Company to release their energy use information to energy efficiency program sponsors and System Benefits Charge (SBC) program administrators and/or designees and understands that such information will be kept confidential and used only for the purposes of program evaluation and determining program eligibility and energy savings.
5. **Installation Requirements:** To qualify, all installations of heating and water heating equipment and boiler reset controls must be completed by a contractor in conformance with state and local code requirements. Customers are not eligible to receive any other financial incentives/rebates for the same type of measure from any other utility or entity.
6. **Proof of Proper Installation:** The Contractor is required to submit proof of installation via the Contractor portal. The Customer will allow National Grid's verification contractor access to the space for verification purposes, if needed.
7. **On-site Inspection:** National Grid reserves the right to conduct field inspections to verify installations. The Customer agrees to provide National Grid (and its subcontractors) access to the premises for pre-installation, installation, and follow-up visits upon reasonable notice, and at a time convenient to the Customer. The Customer understands that the purpose of the follow-up visit(s) is to provide National Grid with an opportunity to review the operation of the Heat Pumps for quality control and Program evaluation purposes only. Such inspections or follow-up visits do not include any type of safety review. National Grid is under no obligation to (i) make follow-up visits, (ii) review the operation of the Heat Pump, or (iii) make any suggestions of any kind to the Customer.

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8. **Indemnification:** Customer shall defend, indemnify, and hold harmless the Company and its officers, directors, employees, agents, and servants and assigns from and against any and all losses, claims, demands and/or liability for damage to property, injury or death of any person, or any other liability incurred by the Company, including all expenses, legal or otherwise, arising out of or related to the equipment or installation, except to the extent attributable to the negligence of Company. In no event shall Company's liability to Customer exceed the rebate amounts.
  9. **Limited Scope Review:** The scope of review by the Company and the Vendor and their inspector of the installation of the equipment is limited solely to determine whether rebates are payable. It does not include any kind of safety or code review and should not be relied upon as one.
  10. **Rebate Amounts:** The Company will provide rebates for approved heating, water heating, thermostat, pipe or water heating tank insulation, thermostatic radiator valve, or boiler reset control equipment, up to rebate amount indicated in the program literature and within this application. Qualifying equipment purchased between January 15, 2021, and December 31, 2025, are eligible for a rebate, pending funding availability. Rebate amount will not exceed purchase price of qualifying equipment and installation.
  11. **Payment:** The Company, through the Vendor, expects to make rebate payments to eligible customers within two weeks of satisfactory work verification. The customers must refund any rebate made to the extent the contractor or equipment does not satisfy program requirement.
  12. **No Warranties:** The Company does not endorse, guarantee or warrant any particular contractor, manufacturer or product installation, and the Company disavows and provides no warranties, expressed or implied, for any product or services that may be rendered hereunder. The Customer's reliance on warranties is limited to any warranties that may arise from, or be provided by, contractors, vendors, or manufacturers. The Company and the Vendor do not make any representation of any kind regarding the results to be achieved by the equipment or the adequacy or safety of such equipment.
  13. **Changes in the Program:** Equipment Incentive Program/Tax Liability Conditions and details of the program are subject to change without prior notice, and rebate offers may increase or decrease over time. The Company reserves the right to modify or terminate the program without notice. Participants of the program may be subject to tax liability for the value of goods and services received through the program pursuant to state or federal income tax codes. The Company is not responsible for any tax liability that may be imposed as a result of receipt of the rebate by the Customer.
  14. **Contractor Status:** The status of the Contractor(s) providing the Customer services associated with the heat pump installation and applying for a rebate under this program shall be that of an independent contractor and not that of an agent or employee of National Grid or NYSEDA. The Company is not responsible for any damage that may be caused by or arise out of an installation of any equipment. The Customer is responsible for selecting Contractors who are qualified and carry adequate insurance coverage.
  15. **Eligible Measures:** Only measures included on this application are eligible for rebates. The Company will not provide rebate payments for non-eligible equipment, substitutions, or used equipment. The Company has the right to reject any rebate application with ineligible equipment not indicated on this form.