Central Air Conditioning/Air Source and Ductless Mini-Split Heat Pumps

REQUIREMENTS

2014 HEAT Loan Program

MINIMUM STANDARDS & REQUIREMENTS

Eligible equipment rebates offered on this form are made available by the COOL SMART program.

REQUIREMENTS

1. Air Conditioning equipment and Air Source Heat Pumps must meet all of the following requirements, including the Minimum Efficiency Standards listed in the chart below.
2. The customer is responsible for obtaining a proposal from a Quality Installation Verification (QIV) trained contractor for the eligible equipment. COOL SMART trains contractors to install and test equipment to ensure it meets the manufacturer's specifications. For a list of QIV trained contractors, visit MassSave.com/COOLSMART. For Ductless Mini-Split Heat Pumps, refer to #5.
3. Copy of Load (sizing) Calculation "ACCA approved version 8 Manual J" must be submitted with the proposal. For Ductless Mini-Split Heat Pumps, refer to #5.
4. Copy of AHRI certificate must be submitted with proposal.
5. Ductless Mini-Split Heat Pumps do not require a QIV test or a Load Calculation and can be installed by any licensed HVAC contractor.
6. Any new duct work associated with the new equipment installation will need to be itemized on the contractor proposal.

RESTRICTIONS

1. Do-It-Yourself (DIY) installations are NOT eligible for HEAT Loan financing.
2. Ductless Mini-Split cooling only units are NOT eligible for HEAT Loan financing or COOL SMART rebates.
3. Municipal Electric customers that heat with gas do not qualify for any central air conditioning/heat pump upgrades.
4. Humidifiers, air filtration systems and electrical panel replacement/upgrades over $500 are not eligible for financing.
5. Maximum amount that can be financed is $10,000 per active electric account, for Ducted Central AC Systems only.

REBATE	QUALIFYING EQUIPMENT	SEER	EER	HSPF
$150	Central AC / Air Source Heat Pumps	≥14.5	≥12	≥8.2*
$300	Central AC / Air Source Heat Pumps	≥15	≥12.5	≥8.5*
$500	Central AC / Air Source Heat Pump	≥16	≥13	≥8.5*
$150	Ductless Mini-Split Heat Pumps	≥16	≥12	≥8.2*
$300	Ductless Mini-Split Heat Pumps	≥19	≥12.5	≥10
$500	Ductless Mini-Split Heat Pumps	≥20	≥13	≥10

SEER: Seasonal Energy Efficiency Ratio. EER: Energy Efficiency Ratio is a measure of instantaneous cooling efficiency.
*HSPF is only required for heat pump equipment. HSPF: Heating Seasonal Performance Factor.

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For more information about the COOL SMART Program, including Participating Contractors and rebate forms, visit MassSave.com/COOLSMART.

SEE REVERSE SIDE FOR LOAN PROCESS CHECK LIST

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LOAN PROCESS CHECK LIST

✓ **To apply for a HEAT Loan, follow the steps outlined below to obtain a HEAT Loan Authorization Form.**

☐ **Review both sides of this sheet. (Minimum Standards & Requirements page on back).**

If financing a Central Air Conditioning unit or an Air Source Heat Pump:

☐ Select a COOL SMART Quality Installation Verification (QIV) certified contractor to do the work; A list of QIV contractors is available at: MassSave.com/COOLSMART

☐ After selecting a contractor, please obtain the following documentation:

1. A signed proposal on contractor letterhead that states the make and model number of the condenser and coils that are being installed (outdoor and indoor units)
2. Matching AHRI Certificate and the Load (sizing) Calculation "ACCA approved version 8 Manual J" from your contractor to be submitted with the proposal
3. Any new duct work associated with the new equipment installation will need to be itemized on the contractor proposal

Important Note: Maximum amount that can be financed is $10,000 per active electric account, for Ducted Central AC Systems only.

If financing a Ductless Mini-Split Heat Pump:

☐ Select any MA state licensed HVAC contractor to do the work

☐ After selecting a contractor, please obtain the following documentation:

1. A signed proposal on contractor letterhead stating the make and model number of the condenser and coils that are being installed (outdoor and indoor units)
2. Matching AHRI Certificate from your contractor to be submitted with the proposal

☐ View the Qualifying Equipment table on the reverse side of this form to ensure that the system you are financing meets the minimum standards of the program. ***Only the equipment that meets the standards in the table is eligible for a rebate and HEAT Loan financing***

☐ Once all of the necessary documentation has been obtained, refer back to the Steps to Participate insert for information on submitting the application.

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More information, along with a list of Participating Lenders, is available at MassSave.com/HEATLoan and in the HEAT Loan folder.