

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

# REQUIREMENTS 2015 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
\$250	Central AC	≥16	≥13	N/A
\$500	Central AC	≥18	≥13	N/A
\$250	Ducted Air Source Heat Pumps	≥16	N/A	≥8.5
\$500	Ducted Air Source Heat Pumps	≥18	N/A	≥9.6
\$250	Ductless Mini-Splits	≥18	N/A	≥9
\$500	Ductless Mini-Splits	≥20	N/A	≥11

SEER: Seasonal Energy Efficiency Ratio. EER: Energy Efficiency Ratio is a measure of instantaneous cooling efficiency.  
HSPF: Heating Seasonal Performance Factor.



For more information about the COOL SMART Program, including  
Participating Contractors and rebate forms, visit [MassSave.com/COOLSMART](http://MassSave.com/COOLSMART).



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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 QIV Certified contractor, the Mass Save program recommends the customer verify that the contractor is licensed and insured, before obtaining the following information:
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 contractor to do the work. The Mass Save program recommends the customer verify that the contractor is licensed and insured.

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.



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

