



# California

## FinAnswer<sup>®</sup> Express 2011 Incentive Application Packet

Motor & Variable Frequency  
Drive Technologies

Heating, Ventilation, Air  
Conditioning (HVAC)  
Technologies

Building Envelope Technologies

Dairy/Farm Equipment

Irrigation

Compressed Air Technologies

Commercial Food Service  
Equipment

Appliances

LED Refrigeration Case  
Lighting

Other Energy Efficiency  
Technologies

### ABOUT THE PROGRAM

*This application packet contains three parts:*

- Customer Information Form
- Terms and Conditions
- Equipment Incentive Worksheet

(This packet does not pertain to FinAnswer Express lighting projects. Contact us or your vendor before you start a lighting project.)

*To get started, review the following steps:*

1. **Read** the Terms and Conditions (page 3).
2. **Locate** the qualifying equipment in the applicable Incentive Catalog, available at [pacificpower.net/wattsmart](http://pacificpower.net/wattsmart). Equipment specifications and descriptions, incentive eligibility requirements, and incentive amounts are listed in the catalogs. Some restrictions apply; please see the applicable Incentive Catalog. Technical assistance and custom incentives for equipment not listed in the Incentive Catalogs may be available. Please contact Pacific Power or your vendor before purchasing equipment.
3. **Order / Purchase and Install** qualifying equipment between January 1, 2011 and December 31, 2011. Qualifying equipment must be installed before submitting your application. All applications must be postmarked by January 31, 2012 to be considered eligible.
4. **Complete the following forms available in this application packet:**
  - Complete the **Customer Information Form** (page 2). Be sure to include ALL required customer information and Account Information.
  - Complete the **Equipment Incentive Worksheet** (page 4) and the appropriate **Application Supplement, if applicable** (see incentive catalog). Be sure to include all required information.
5. **Sign the following documents:**
  - The bottom of the Terms and Conditions (page 3), accepting the terms and conditions as stated.
  - If the incentive is to be paid to a party other than the Customer as provided on the Pacific Power bill, the *Payment Release Information* section of the **Customer Information Form** (page 2) **MUST** be completed and signed.
6. **Retain a copy** of all completed application forms and all required documentation, such as receipts and contracts, for your records. Submitted applications will become the property of Pacific Power.
7. **Mail** the completed forms and other required documentation to:

**FinAnswer Express Application Processing**  
6312 SW Capitol Way #1023  
Portland, OR 97239

## Submit This Page for Processing

**IMPORTANT:** Please be sure to send the COMPLETED Application/Agreement (3 pages) along with copies of the required supporting documentation. Equipment must be purchased and installed at a qualifying facility within the state of California prior to submitting an incentive application (except for custom measures). Please allow 6 weeks for incentive processing. Please be sure to follow all eligibility requirements stated in the Incentive Catalogs. **Incentives will not be paid for ineligible or incomplete applications.**

### CUSTOMER INFORMATION

*(CHECK WILL BE ISSUED TO THIS BUSINESS NAME AND ADDRESS UNLESS THE PAYMENT RELEASE SECTION HAS BEEN FILLED OUT AND SIGNED)*

Business Name (as it appears on Pacific Power Bill)

Address Where Item(s) Installed \_\_\_\_\_ City \_\_\_\_\_ State **CA** Zip Code \_\_\_\_\_

Mailing Address (if different from the installation address) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Contact Name \_\_\_\_\_ ( ) Contact Telephone Number \_\_\_\_\_ ( ) Contact Fax Number \_\_\_\_\_ E-mail \_\_\_\_\_

**Commercial/industrial electric account no.** [where unit(s) was installed] \_\_\_\_\_ - \_\_\_\_\_  
 (or electric kWh meter number – seven or eight digits) \_\_\_\_\_

### PAYMENT RELEASE INFORMATION (THIRD PARTY INCENTIVE ASSIGNMENT)

**NOTE:** Complete this section only if incentive payment is to be directed to someone other than the customer as indicated above.

I AM AUTHORIZING THIS INCENTIVE PAYMENT TO THE THIRD PARTY NAMED BELOW AND I UNDERSTAND THAT I WILL NOT BE RECEIVING THE INCENTIVE PAYMENT CHECK FROM PACIFIC POWER. I ALSO UNDERSTAND THAT MY RELEASE OF PAYMENT TO THE THIRD PARTY DOES NOT EXEMPT ME FROM THE INCENTIVE REQUIREMENTS OUTLINED IN THE APPLICATION.

Authorized By: (Please Print) \_\_\_\_\_ Signature of Authorized \_\_\_\_\_ Date \_\_\_\_\_

**CHECK SHOULD BE MADE PAYABLE TO:**

Payee: Individual / Business Name \_\_\_\_\_ ( ) Contact Telephone Number \_\_\_\_\_

Payee Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

**IF THE THIRD PARTY PAYEE IS A BUSINESS, PLEASE PROVIDE THE FOLLOWING INFORMATION:**

**Tax Status:**  Corporation  Partnership  Individual/Sole Proprietor  Exempt

**Tax ID Number:**  EIN \_\_\_\_\_  Federal Tax ID \_\_\_\_\_  SSN \_\_\_\_\_

**For More Information** about the FinAnswer Express program, eligibility requirements, incentive levels or other general inquires:

- Visit our website at [pacificpower.net/wattsmart](http://pacificpower.net/wattsmart) and submit your inquiry online
- E-mail us at [energy.expert@pacificcorp.com](mailto:energy.expert@pacificcorp.com)
- Call our energy services hotline at 1-800-222-4335

# **Submit This Page for Processing**

## **TERMS & CONDITIONS**

**Qualifying Customers.** Eligible customers include commercial, industrial, and agricultural electric customers whose facilities are within the State of California and who purchase their electricity from Pacific Power on one of the following retail general service schedules: **A-25, A-32, A-33, A-36, AT-47, AT-48, AWH-31, LS-53, LS-58, OL-42, PA-20, PA-40.**

**Eligible Dates.** This 2011 Customer Incentive Application covers qualifying equipment purchased between January 1, 2011 and December 31, 2011. Incentive applications for 2011 installations must be postmarked by January 31, 2012. Applications received after this date may not be processed. Equipment must be purchased and installed prior to submitting an incentive application. For 2012 installations, visit our website at [pacificpower.net/wattsmart](http://pacificpower.net/wattsmart).

**Incentive Limitations & Limitation of Damages.** Pacific Power does not warrant the performance of qualifying/installed equipment and does not warrant that the qualifying/installed equipment will deliver any specified amount of energy or cost savings. The customer shall independently evaluate the qualifying equipment. In no event will Pacific Power be liable for the failure of the customer to achieve its expected amount of energy savings, for harm to customer's facilities of any kind, or for any incidental or consequential damages of any kind in connection with installation of this qualifying equipment.

**Transfer of Environmental Attributes.** Customer hereby transfers to Pacific Power all "Environmental Attributes" attributable to the installation of the qualifying equipment or its operation. Environmental Attributes include any and all credits, benefits, emissions reductions, offsets and allowances, howsoever entitled, resulting from the avoidance of the emission of any substance to the air, soil or water at or by PacifiCorp generating facilities, through reduced generation of energy or other savings or offsets on account of the qualifying equipment. Customer will not claim ownership of any Environmental Attributes. As long as Customer at the same time states the installation of the qualifying equipment was made possible with funding from Pacific Power, Customer may claim that it is facilitating the production of the Environmental Attributes attributable to the qualifying equipment.

**Additional Details.** Incentive qualifications and amounts are subject to change and termination at any time. Visit the program's website, review the Incentive Catalogs, or contact your local equipment dealer or Pacific Power for current program information. Pacific Power reserves the right to conduct random inspections to verify information provided on the application. After incentive payment, Pacific Power reserves the right to inspect qualifying equipment, which may include a telephone survey, site visit, and/or the installation of temporary monitoring equipment at any time up to 36 months after installation for quality control of the application or program performance evaluations.

Pacific Power issues FinAnswer Express incentives in the form of checks, not utility bill credits. Pacific Power is not responsible if your dealer provides inaccurate information about the amount and/or conditions of the actual incentive and Pacific Power will not pay incentives for equipment that is mislabeled or misrepresented by dealers regarding incentive qualifications. Qualifying equipment receiving incentives under the FinAnswer Express program may not receive purchase and installation incentives or credits under other Pacific Power programs. Please allow six weeks for your incentive check to arrive.

### **CUSTOMER ACCEPTANCE OF TERMS**

I hereby certify that all information provided is accurate, including claims of customer and equipment information, and that the equipment associated with this incentive application/agreement has been purchased and installed. I have read the **terms and conditions** and agree to be bound by them and agree that Pacific Power may verify all the information provided. My signature below authorizes Pacific Power to provide my electric account information to contractors associated with the FinAnswer Express program.

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Customer Signature

Date

Printed Name

Title

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## EQUIPMENT INCENTIVE WORKSHEET

Please complete all the information requested in this form for each submitted equipment measure. Include additional sheets for additional equipment measures as necessary. Please refer to the appropriate Incentive Catalog(s) for the applicable Equipment Code and Measure Incentive, and any necessary Application Supplements. Please refer to your equipment invoice/receipt for Manufacturer and Model number information.

### INCOMPLETE APPLICATIONS WILL NOT BE ACCEPTED

Parameter	Measure 1	Measure 2	Measure 3
<b>Equipment Code</b>			
<b>Project Type</b> (Retrofit or New Construction)			
<b>Installation Date</b>			
<b>Equipment Location</b> (e.g. roof, mechanical room)			
<b>Dealer Name</b>			
<b>Manufacturer</b>			
<b>Model Number<sup>1</sup></b>			
<b>Serial Number</b>			
<b>AHRI Reference Number</b> (HVAC equipment only)			
<b>Efficiency Ratings</b> (Examples- A/C: EER + SEER/IEER Heat Pump (cooling): EER + IEER Heat Pump (heating): HSPF/COP)			
<b>Equipment Size</b> (e.g. 5 HP, 7 tons, 500 sqft, 50 Watts)			
<b>Measure Incentive (\$) per Unit</b> (e.g. HVAC - \$100/ton * 10 tons = \$1000; VFD - \$65/HP * 5 HP = \$325)			
<b>Number of Units</b>			
<b>Calculated Total Incentive (\$)</b> (# of Units * Measure Incentive/Unit)			

<sup>1</sup> For split system HVAC equipment, include the condenser model number and the evaporator coil model number

### FINAL CHECK LIST

- Did you read and understand the measure eligibility requirements in the applicable Incentive Catalog?
- Did you attach additional information if specified in the Incentive Catalog?
- Did you include a copy of the dated sales receipt/invoice with labor and material itemized?
- Did you include a copy of the Pacific Power bill for the address where the item(s) were installed?
- Did you complete the required information above?
- Did you attach a completed Customer Information Form (page 2) including your account number?
- Did you sign and attach the Terms and Conditions (page 3)?

### SEND COMPLETED APPLICATIONS WITH ATTACHMENTS TO:

**FinAnswer Express Application Processing**

**6312 SW Capitol Way #1023  
Portland, OR 97239**