



An AEP Company

# 2024 Residential Energy Improvement Pathway HVAC Project Completion Form

## Section One: General Project Information

Project Information					
Installation Date:		Contractor:			
First Name:		Last Name:			
Project Site Address:					
Project Site City:		County:		Zip:	
Primary Phone:		Alt. Phone:			
E-mail Address:					
Account Information					
SWEPCO Account #:					
SWEPCO Account Holder Name					
Incentive Mailing Information (if different than above)					
First Name:		Last Name:			
Address:					
City:		State:		Zip:	
General Home Information					
Square footage:		# of Residents:		# of Stories:	
Heating Type:	<input type="checkbox"/> Electric Heat Pump	<input type="checkbox"/> Electric Resistance	<input type="checkbox"/> Gas	<input type="checkbox"/> Dual Fuel	
Air Conditioning:	<input type="checkbox"/> Central	<input type="checkbox"/> Window	<input type="checkbox"/> None		
Water Heater Fuel Type:	<input type="checkbox"/> Electric	<input type="checkbox"/> Gas	<input type="checkbox"/> Heat Pump Water Heater		
Gas Company used:	<input type="checkbox"/> Black Hills Energy	<input type="checkbox"/> CenterPoint	<input type="checkbox"/> AOG	<input type="checkbox"/> None	
Please select home type below (choose <b>all</b> that apply):					
<input type="checkbox"/> Single Family	<input type="checkbox"/> Manufactured	<input type="checkbox"/> Condo/Townhome	<input type="checkbox"/> Apartment/Multifamily	<input type="checkbox"/> Duplex	
<input type="checkbox"/> Permanent	<input type="checkbox"/> Vacation	<input type="checkbox"/> Rental Home	<input type="checkbox"/> Triplex	<input type="checkbox"/> Quadplex	

Please select work performed (check all that apply and complete appropriate sections in Section Two)

- Home Walk-Through Assessment
- Air Conditioning or Heat Pump Installation
- ENERGY STAR Smart Thermostat
- Insulation
- Duct Sealing Duct Sealing
- Air Infiltration
- ENERGY STAR Windows



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### Section Two: Measure Specific Information

For each measure installed or service performed, complete the applicable section(s). If noted, attach requested documentation to this form. Failure to submit required documentation may result in a delay or cancellation of incentive payment.

#### Heat Pump / Air Conditioning Installation – Unit One

**Requirements: Minimum of 15.2 SEER2 and 7.25 HSPF2**

Existing Unit Condition:	<input type="checkbox"/> Operational (Early retirement)	<input type="checkbox"/> Non-Operational (Replace on Burnout)	Age of System:
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Existing Heat Type:	<input type="checkbox"/> Electric Resistance	<input type="checkbox"/> Heat Pump	<input type="checkbox"/> Gas	<input type="checkbox"/> Dual Fuel
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Existing System Model #	Existing System Serial #
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**New System Information – Copy of Load Calculation(s) must be attached**

System Type:	<input type="checkbox"/> Air Conditioner	<input type="checkbox"/> Heat Pump	<input type="checkbox"/> Split System	<input type="checkbox"/> Package System
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Unit Size (Tons):	SEER2:
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EER2:	HSPF2 (heat pump only):
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Condenser Model #:	Coil Model #:
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AHRI Number:	Manufacturer:
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#### Heat Pump / Air Conditioning Installation – Unit Two

**Requirements: Minimum of 15.2 SEER2 and 7.25 HSPF2**

Replacement Type:	<input type="checkbox"/> Operational (Early Retirement)	<input type="checkbox"/> Non-Operational (Replace on Burnout)	Age of System:
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Existing Heat Type:	<input type="checkbox"/> Electric Resistance	<input type="checkbox"/> Heat Pump	<input type="checkbox"/> Gas	<input type="checkbox"/> Dual Fuel
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Existing System Model #	Existing System Serial #
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**New System Information – Copy of Load Calculation(s) must be attached**

System Type:	<input type="checkbox"/> Air Conditioner	<input type="checkbox"/> Heat Pump	<input type="checkbox"/> Split System	<input type="checkbox"/> Package System
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Unit Size (Tons):	SEER2:
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EER2:	HSPF2 (heat pump only):
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Condenser Model #:	Coil Model #:
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AHRI Number:	Manufacturer:
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#### ENERGY STAR Smart Thermostat #1

Model #:	Serial Number:	Brand:
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Where Purchased:	Square footage served by this Thermostat:
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Existing Model:	<input type="checkbox"/> Manual	<input type="checkbox"/> Programmable	How was the old thermostat used?	<input type="checkbox"/> Adjusted as Needed	<input type="checkbox"/> On Programed Schedule
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#### ENERGY STAR Smart Thermostat #2

Model #:	Serial Number:	Brand:
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Where Purchased:	Square footage served by this Thermostat:
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Existing Model:	<input type="checkbox"/> Manual	<input type="checkbox"/> Programmable	How was the old thermostat used?	<input type="checkbox"/> Adjusted as Needed	<input type="checkbox"/> On Programed Schedule
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### Duct Sealing – System #1

**Requirements: Duct Blaster test-in and test-out, > 80 CFM, Leakage to outside test only.**

Leakage Rate CFM <sub>25</sub>	Pre:		Post:		Area Served	
Unit SEER:		Tonnage:		HSPF:		

### Duct Sealing – System #2

**Requirements: Duct Blaster test-in and test-out, > 80 CFM, Leakage to outside test only.**

Leakage Rate CFM <sub>25</sub>	Pre:		Post:		Area Served	
Unit SEER:		Tonnage:		HSPF:		

### Ceiling Insulation

**Requirements: ≤R-22 existing, R-38 post value,**

**Note: The home must not be eligible for insulation via the SWEPCO Home Performance with ENERGY STAR program**

Existing Insulation Type:		Existing Depth:		Existing R-Value:	
Installed Insulation Type:		Installed Depth:		Installed R-Value:	
Sq. ft. of Application Area:		Notes:			

### Wall Insulation

**Requirements: No existing insulation, R-13 post value**

R-Value	Pre:		Post:	
Sq. ft. of Application Area:				

### Air Infiltration

**Requirements: ≥ 20% reduction at CFM<sub>50</sub>**

Shielding of Building:	<input type="checkbox"/> Well Shielded	<input type="checkbox"/> Normal	<input type="checkbox"/> Exposed			
CFM <sub>50</sub>	Pre:		Post:		MVR:	

### ENERGY STAR Windows

**Requirements: ENERGY STAR certified windows & exterior doors (1/2 lite or greater, sliding glass doors, french)**

Existing Window Type:	<input type="checkbox"/> Single pane, aluminum frame	<input type="checkbox"/> Single pane, with storm window	<input type="checkbox"/> Double-pane, aluminum frame	
<b>Window Type</b>	<b>Quantity</b>	<b>Square Footage</b>	<b>U-Factor</b>	<b>SHGC</b>
Small Windows				
Medium Windows				
Large Windows				
Extra Large Windows				
<b>Total</b>				

Incentive Rates per ENERGY STAR window/door assembly			
Small Windows (4.0-19.99 Ft <sup>2</sup> )	\$30 / Window Assembly	Medium Window (20.0-35.99 Ft <sup>2</sup> )	\$40 / Window Assembly
Large Windows (36.0-50.99 Ft <sup>2</sup> )	\$80 / Window Assembly	Extra Large Windows (51.0+ Ft <sup>2</sup> )	\$120 / Window Assembly



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## Incentive Information

Incentive Reserved:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	If yes, Project ID:	
Customer Estimated Incentive*	All Incentives default to Customer, unless transferred below			
Contractor Estimated Incentive*	Only Applicable if transferred below			

\* Estimated incentive is based on the approved 2024 Incentive Rate Table for the Residential Energy Improvement Pathway. Contractor is responsible for ensuring all calculations are accurate and eligibility requirements are met.

## Customer Incentive Transfer

Initial to the right <b>only</b> if full incentive should be paid to the installing contractor. If so, the installing contractor will show corresponding credit on customer invoice.	<b>Customer Initials:</b> _____
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## Signature

Customer and Contractor have read and agree to the Terms and Conditions below and certify that information provided in this Project Completion Form is accurate and true to the best of their knowledge.

### Customer

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

### Contractor

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

Please check box if you do not wish to receive additional information about SWEPCO's energy efficiency pathways.

## Terms and Conditions

Customer and Contractor acknowledge and agree to the following terms and conditions.

- Incentives will only be received if the equipment installed or services performed qualify in accordance with the pathway standards.
- The incentive from SWEPCO is assigned to help offset the cost to install the energy efficiency upgrades. Customer is responsible for paying the balance of the costs associated with such upgrades including, but not limited to, cost of materials and contractor fees.
- Customer is responsible for paying a contractor for any fees associated with installing the energy efficiency upgrades or performing services and SWEPCO has no part in any agreement between the contractor and homeowner.
- The incentives associated with any project will only be paid to a SWEPCO residential customer (and/or their selected participating contractor) for work performed on a home with a valid SWEPCO electric meter.
- Qualifying new product(s) must be installed in accordance with all applicable federal, state, and local laws, building codes, and manufacturer's specifications.
- Customer and contractor participation in SWEPCO's Residential Energy Improvement Pathway and/or New Construction Pathway is voluntary. SWEPCO has the right to change or modify the pathways at any time.
- The customer agrees to allow SWEPCO access to the smart thermostat/equipment use data as enabled from the thermostat manufacturer.
- Customer will allow, if requested, a representative from SWEPCO or any authorized third-party reasonable access to the project site to verify the installed product before or after an incentive is paid. The verification of installation must be scheduled within 30 days of customer contact by SWEPCO. SWEPCO may contact the contractor, if needed, to verify installation and may provide customer's name and/or address to complete this verification. If SWEPCO is unable to verify the installation of products and/or the performance of work, customer will be required to reimburse SWEPCO for the total amount of the incentive.
- If a tenant, customer is responsible for obtaining the property owner's permission to install measures under this pathway. By providing a signature on the Project Completion Form upon project completion, customer indicates this permission has been obtained.
- Customer and Contractor agree to indemnify SWEPCO and its agents, and employees against all loss, damage, expense, and liability, resulting from injury to, or death of persons; against all injury to property arising out of or in any way connected with any measures installed or services performed.
- Customer understands that to receive an incentive, the equipment installed must qualify in accordance with the pathway guidelines.
- All projects must be installed and/or services must be performed by a contractor participating in SWEPCO's Residential and/or New Construction Pathway. The selection of a participating contractor to perform the work is the sole decision of the property owner or authorized lessee/occupant. Inclusion of a participating company to perform work does not represent an endorsement by Southwestern Electric Power Company (SWEPCO) or CLEAResult of any product, individual, or company. Work performed by participating companies is not guaranteed or subject to any warranty, either expressed or implied, by either SWEPCO or CLEAResult. Neither SWEPCO nor CLEAResult make any guarantee or any other representation as to the quality, cost, or provided effectiveness of the products provided or work performed by any participating company or by its employees, subcontractors, or suppliers.
- Customer and Contractor agree to defend, protect, indemnify, and hold harmless SWEPCO and CLEAResult, its respective officers, directors, agents, and employees (herein referred to as "Indemnified Parties") from and against any and all claims, losses, agents, expenses, attorneys' fees, damages, demands, judgments, causes of action, suits, and liability in tort, contract, or any other basis and of every kind whatsoever (hereinafter referred to as "claims") arising out of contractors, its agents or subcontractors, acts or omissions incident to or related in any way to, directly or indirectly, the services agreement and/or the Pathway. Customer and Contractor acknowledge and agree that with respect to any claims brought against the Indemnified Parties, Customer and Contractor will be required to waive as to the Indemnified Party any defense it may have by virtue of the Worker's Compensation Laws of any state, to the extent allowed by law.

Customer Copy