

Program Staff

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 = New Requirement

Incentive Structure

The Program provides direct payment of financial incentives to Distributors who deliver energy efficient HVAC systems and ENERGY STAR® Smart Thermostats. The incentive structure has been simplified to be a 2-step process.

Step 1: Find the base incentive in the Base Table/Replace-on-Burnout (ROB) Table.

Step 2: Choose any combination of applicable bonus incentives. These can include:

- Early Retirement (up to 15 years old)
- Heat Pump: Either replacing another Heat Pump or replacing an Electric Resistance furnace (strip heat)
- Mini Split: Either an AC or Heat Pump
- ENERGY STAR Smart Thermostats
- Downsizing
- Low/Moderate Income

Helpful Definitions

- **Replace-on-Burnout (ROB):** occurs when the homeowner is replacing a defective, non-functioning, HVAC system.
- **Early Retirement (ER):** occurs when the homeowner electively chooses to replace a functional HVAC system for a new system.
- **ENERGY STAR Smart Thermostat:** Dealer must install an ENERGY STAR certified Wi-Fi smart thermostat with a qualifying system and include it in the incentive application.
- **Downsizing:** The Dealer will need to install a smaller system than was originally installed. On a multiple-system home, each system that is downsized will be eligible for the downsizing incentive.
- **Low/Moderate Income (LMI):** HVAC system must be installed in one of ten qualifying communities and is eligible for double the base incentive.

Home Eligibility Requirements

1. The HVAC unit must be installed within the CenterPoint Energy distribution service territory. There are two methods to determine if a home is eligible:
 - a. Meter must say “CenterPoint Energy”.

- b. Look up the address using this link:
<https://electricityplans.com/texas/esid-lookup/>
2. Equipment must not receive incentives from any other CenterPoint Energy energy-efficiency program.
3. Site must be designated as residential and must also be individually metered. Master-metered properties are not eligible.

System Eligibility Requirements

1. Residential systems must meet or exceed the following efficiency requirements and must be within the following capacity requirements:
 - a. Split and mini-split A/C and heat pump systems:
 - i. 15.2 SEER2/10 EER2/7.5 HSPF2
 - ii. Cooling capacity between 15,000 to 65,000 BTUH (1 to 5 tons).
 - iii. Must be Two Stage or Variable Speed
 - b. Thermostats must be ENERGY STAR® certified
2. Mini-Split - Install a high efficiency mini-split system in the following scenarios:
 - a. New Construction
 - b. Existing Construction – new room addition (conditioning a previously unconditioned room, like a garage or sunroom)
 - c. Existing Construction – replacing Central AC with multiple mini-splits: pre and post tonnage must be within ½ ton.
3. Central Split Systems installed in **New Construction** are eligible to receive incentives at a reduced rate. (Please reach out to ICF Program Staff or your Distributor)
4. All systems must be AHRI-matched.
5. Packaged, window or room air conditioning units are not eligible.
6. Single stage equipment is not eligible to receive incentives.

Dealer/Contractor Required Documentation

For all incentive Requests:

1. Invoice with line item displaying the model and serial numbers of all newly installed equipment (including qualifying ENERGY STAR certified thermostat, if applicable)
2. Invoice with line item with that states “CenterPoint Energy Incentive” with the amount passed on to the customer.
 - a. There is a **minimum incentive passthrough** requirement starting in 2024. Please reach out to your Distributor for exact incentive amounts.
3. AHRI reference number for the newly installed equipment.
4. A completed and signed Incentive Claim Form.
5. Dealer must run an approved load calculation and retain it on file for three years. No need to submit load calculation to distributor.
6. Notify the customer that they are participating in a CenterPoint Energy sponsored energy-efficiency program developed by the Public Utility Commission of Texas. Therefore, the customer may receive a site visit or phone call from CenterPoint Energy personnel to verify install specifications.

Additional documentation needed for **Early Retirement (ER)**:

- Amperage meter photos
- Condenser nameplate photos

Additional documentation needed for **Electric Resistance to Heat Pumps** replacements:

- A photograph of the existing nameplate, including the model and serial numbers. Alternatively, a picture of the electric heat strips can be submitted if the nameplate is inaccessible or obscured.

Additional documentation needed for **Downsizing Incentive Bonus**:

- Summary pages of an ACCA approved Manual J8, including:
 - Retired Outdoor Unit Model and Serial Number
 - Retired Outdoor Unit Manufacturer
 - Estimated Square Footage of Conditioned Floor Area served by retired unit
 - Photograph of Retired Outdoor Unit Nameplate

Additional information needed for **Low/Moderate Income Bonus**:

- Must be located in one of the ten qualifying communities, called Houston Complete Communities:
 - Acres Homes
 - Alief Westwood
 - Fort Bend Houston
 - Gulfton
 - Kashmere Gardens
 - Magnolia Park – Manchester
 - Near Northside
 - Second Ward
 - Sunnyside
 - Third Ward

FAQ

Q: What are the incentives available for the 2024 Program?

A: Incentive amounts will be provided by a participating Distributor.

Q: Where do Dealers submit the completed incentive paperwork?

A: Dealers can either submit all paperwork to their salesperson at any participating Distributor or use our mobile app, Sightline Mobile.

Q: When can I expect my reimbursement?

A: All Distributors have different processing times, but generally, Dealers can expect funds 4 to 12 weeks after the Distributor submits all necessary documentation into the online portal.

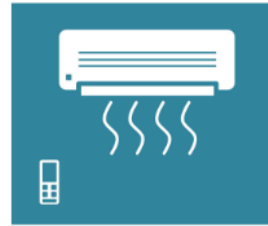
Q: We do not do load calculations. Can we still participate?

A: No, we require load calculations. Your team can get free training on this and other best practices through the ICF energy efficiency training portal. Reach out to your ICF staff for access.

SAMPLE INVOICE

FAKE HVAC, INC. 123 Main St.
Houston, TX 77002

Office: (713) 555-5555



Service Invoice

Date: 02/01/2024
Customer Name: John Doe
Address: 987 Street St.
Houston TX 77002

DESCRIPTION	QUANTITY	COST
Labor	X	\$XXXX
Equipment Model number		
Equipment Serial Number		
ENERGY STAR Thermostat Model and Serial		
CenterPoint Energy Incentive		-\$XXX
Other discounts		-\$XXX
TOTAL	X	\$XX,XXX

SAMPLE INVOICE

HVAC Dealer/Contractor Overview



2024 CenterPoint Energy Midstream MTP - HVAC		Incentive Claim Form	
Type : <input type="checkbox"/> Single Family <input type="checkbox"/> Multifamily Homeowner Name : _____ Homeowner Email : _____ Homeowner Phone # : _____ Street Address, Unit # : _____ City, State, Zip : _____ County : _____		Dealer Name : _____ Dealer Email : _____ Dealer Phone # : _____ Dealer Contact Name : _____ Equipment Distributor : _____ ESID Number : 1 0 0 8 9 0 ESID Lookup: https://electricityplans.com/texas/esid-lookup/	
All incentive requests report the newly installed equipment here			
		System #1	System #2
Date of Installation :			
Type of Unit Replaced :	<input type="checkbox"/> AC/Gas <input type="checkbox"/> AC/Elec. Res. <input type="checkbox"/> Heat Pump	<input type="checkbox"/> AC/Gas <input type="checkbox"/> AC/Elec. Res. <input type="checkbox"/> Heat Pump	
Type of Unit Installed : (Select all that apply)	<input type="checkbox"/> AC <input type="checkbox"/> Heat Pump <input type="checkbox"/> DC Inverter <input type="checkbox"/> Mini-Split <input type="checkbox"/> Central System	<input type="checkbox"/> AC <input type="checkbox"/> Heat Pump <input type="checkbox"/> DC Inverter <input type="checkbox"/> Mini-Split <input type="checkbox"/> Central System	
Compressor Type :	<input type="checkbox"/> Multi <input type="checkbox"/> Variable	<input type="checkbox"/> Multi <input type="checkbox"/> Variable	
AHRI Number :			
New System Tonnage :			
Manufacturer :			
Efficiency Levels :	SEER2 (15.2+) EER2 (10.0+) HSPF2 (7.5+)	SEER2 (15.2+) EER2 (10.0+) HSPF2 (7.5+)	
Outdoor Unit Model # :			
Outdoor Unit Serial # :			
Indoor Coil Model # :			
Indoor Coil Serial # :			
Furnace Model # :			
Bonus Incentive: Downsizing			
Estimated Area Served :			
Original System Tonnage :			
Nameplate photos and Manual J attached :	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Bonus Incentive: ENERGY STAR® Certified Smart Thermostat			
ENERGY STAR® ONLY - Visit ENERGYSTAR.gov for list of qualifying thermostats	Brand :		
	Model # :		
	Serial # :		
Additionally, all incentive requests must submit: 1) The homeowner's invoice that shows: model/serial numbers of all installed equipment. 2) The incentive amount that is passed on to the homeowner- labeled as " CenterPoint Energy Incentive ". 3) Required photos, if applicable.			
Dealer Acknowledgement			
By signing here, the dealer acknowledges that all information entered above is accurate and that the homeowner was informed that he/she may be contacted by CenterPoint Energy for an on-site visit to verify equipment installation.			
Dealer Signature: _____		Date: _____	

Required Fields

Required Fields

Required Fields
New Equipment Info

Bonus: If applicable
required for Electric
Resistance to Heat
Pump

Bonus: Early
Retirement

Bonus: Downsizing
Incentive

Bonus:
Low/Moderate
Income in a
Complete
Community

Bonus: Smart
Thermostat

Required Field:
Homeowner
Acknowledgement
and Signature

Required Field:
Dealer Signature