

## 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 Certified 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. System sized based on ACCA Manual J8 and ACCA Manual S standards
  - 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.
  - d. The following two scenarios apply when installing mini-split systems including Ducted, Non Ducted, Single, and Multi-split, HPs or ACs.

**Scenario 1** –All Mini-Splits – Identify the base incentive amount using the system’s SEER2 & BTUH ratings on Table #1. Mini-Splits are also eligible for a \$300 mini-split bonus incentive per table #3.

**Scenario 2** –All Mini-Split Heat Pump systems replacing electric resistance heating - Identify the base incentive amount using the system’s SEER2 & BTUH ratings on Table #1. When replacing electric resistance heating, the base incentive amount is doubled as indicated on Table #3. Lastly, Mini-Splits are also eligible for a \$300 mini-split bonus incentive per Table #3.

**NOTE: The replacing electric resistance heating doubled incentive bonus can only be claimed for a maximum of 2 Mini-splits per household.**

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.

### 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 2025. Please reach out to your Distributor for exact incentive amounts.



3. AHRI reference number for the newly installed equipment.
4. Incentive Claim Form (Not required but recommended)
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

## HVAC Dealer/Contractor Overview



Q: What are the incentives available for the 2025 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 the mobile app, Sightline Mobile. Please reach out to ICF staff for access.

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 Sightline Learning Center. Reach out to ICF staff for access.

Q: We gave the homeowner more than the **minimum incentive passthrough**. Will that affect the eligibility of my claim?

A: No. The minimum incentive passthrough is required, however, you are allowed and encouraged to pass on more than the minimum incentive passthrough if you wish to do so.

## 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



2025 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 <small>ESID Lookup: <a href="https://electricityplans.com/texas/esid-lookup/">https://electricityplans.com/texas/esid-lookup/</a></small>	
All incentive requests report the newly installed equipment here					
Date of Installation :		System #1		System #2	
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 <a href="http://ENERGYSTAR.gov">ENERGYSTAR.gov</a> 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: _____					
Claim Type : <input type="checkbox"/> Early Retirement <input type="checkbox"/> Replace on Burnout <input type="checkbox"/> New Construction* <small>*Other than mini-splits, New Construction incentives are paid at a reduced rate</small>					
		System #1		System #2	
Bonus Incentive: Electric Resistance to Heat Pump					
1) A clear photo of the existing furnace nameplate, including the model and serial numbers, of the equipment being replaced, OR 2) A picture of the electric heat strips can be submitted if the nameplate is inaccessible or obscured.					
Nameplate photos attached:		<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Bonus Incentive: Early Retirement					
Age of existing outdoor unit: 1) Unit must be 15 years old or less 2) A clear photo of the outdoor unit nameplate, with the model and serial numbers of the equipment being replaced. 3) If the model and serial number cannot be determined by the outdoor unit, a clear photo of the indoor unit nameplate will suffice. 4) A clear photo of the amp meter that shows the existing equipment is operational at the time of replacement. This is recorded as evidence that the system was functional at the time of decommissioning and will be submitted with the Early Retirement incentive request.					
Nameplate & Amp Meter photos:		<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Bonus Incentive: Low/Moderate Income					
Eligible Community Name:					
Zip code:					
Homeowner Acknowledgement					
Congratulations on your new high efficiency HVAC system! We hope that you and your family will benefit from more comfort and greater energy savings; your new system will contribute to reducing energy consumption in our state.					
To comply with the CenterPoint Energy Midstream HVAC Program, please confirm the following:					
Was the old heating equipment an Electric Resistance system and was it replaced with a new Heat Pump system? <span style="float: right;">____ Yes ____ No</span>					
Was your existing system operational at the time of replacement and did the Program incentives motivate you to retire your existing system early by off-setting the cost of higher SEER2 equipment? <span style="float: right;">____ Yes ____ No</span>					
Next, an inspector representing CenterPoint Energy may come by and conduct a quick inspection of the unit to verify the installation. This CenterPoint Energy inspector will contact you to set up an appointment to inspect your unit before arriving at your home. Your signature below is an acknowledgement that the equipment referenced above was installed in your home and that you have read and agreed to the Quality Assurance verification criteria outlined above. Thank you for your participation!					
Incentive Amount Homeowner Received: \$ _____ Homeowner 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

