

# Customer Rebate Application – Sales Tracking Report

Required for heat pump, water heater, thermal storage, and electric vehicle charging station equipment rebates



Please read all program information on the back before completing this form.

OFFICE USE ONLY	
Pre-Request	_____
Request	_____

## Customer Information

Name \_\_\_\_\_ Account number (8 digits found at the center of your bill) \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Address where equipment was installed (if different): \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Contact phone \_\_\_\_\_ Email \_\_\_\_\_

By signing this application, I certify the equipment for which I am claiming a rebate is installed at the address provided and, if requested, I will allow an Otter Tail Power Company representative to physically inspect the installation. I have read and understood all information on the back of this form and have attached my dated receipt specifying the brand and model number purchased. I understand Otter Tail Power Company will calculate the value of the rebate based on the information provided.

Signature \_\_\_\_\_ Date \_\_\_\_\_

## Installing Contractor Information

Installer name \_\_\_\_\_ Business name \_\_\_\_\_

Street address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

## Equipment Information - required

**Air Source or Cold Climate Heat Pump\*** Date installed \_\_\_\_\_ Capacity/tons \_\_\_\_\_ Quantity \_\_\_\_\_  
 Manufacturer/Brand \_\_\_\_\_ Model number \_\_\_\_\_  
 Installed in a newly constructed building or addition  Yes  No — if no, please check one of the following:  
 Primary heating system fuel prior to heat pump installation  Electric  Fuel Oil  Natural Gas  Propane  Other \_\_\_\_\_

**Geothermal Heat Pump\*** Date installed \_\_\_\_\_ Capacity/tons \_\_\_\_\_ Quantity \_\_\_\_\_  
 Manufacturer/Brand \_\_\_\_\_ Model number \_\_\_\_\_  
**Check one**  Closed loop  Open loop **Check one**  Water to air  Water to water  Direct exchange  
 Primary heating system fuel prior to heat pump installation  Electric  Fuel Oil  Natural Gas  Propane  Other \_\_\_\_\_

\*Rebates require equipment AHRI Certificate or manufacturer specification sheets to be attached.

Heat Pump Basic Qualifications			
	MN Premise	ND Premise	SD Premise
Air Source/Cold Climate	Energy Star or 15 SEER/8.5 HSPF/12.5 EER Cold climate min. 10 HSPF  If prior primary heating = natural gas, not eligible for rebate	<b>Air Source Only – see below for Cold Climate</b> On Dual Fuel, Deferred Load, or RDC Rate Premise must include supplemental electric heating such as plenum heater, boiler, baseboard, or heat storage	Energy Star or 15 SEER/8.5 HSPF/12.5 EER Cold climate min. 10 HSPF
Geothermal	Energy Star or qualifying COP Water to air-open 4.1 Water to air-closed 3.6 Water to water-open 3.5 Water to water-closed 3.1 Direct exchange 3.6  If prior primary heating = natural gas, not eligible for rebate	On Dual Fuel, Deferred Load, or RDC rate	Energy Star or qualifying COP Water to air-open 4.1 Water to air-closed 3.6 Water to water-open 3.5 Water to water-closed 3.1 Direct exchange 3.6
Cold Climate	10 HSPF and Dual Fuel, Deferred Load, or RDC Rate	10 HSPF and Dual Fuel, Deferred Load, or RDC Rate	10 HSPF and Dual Fuel, Deferred Load, or RDC Rate
Package Terminal/Rooftop	Energy Star or 12 EER  If prior primary heating = natural gas, not eligible for rebate	On Dual Fuel, Deferred Load, or RDC Rate Premise must include supplemental electric heating such as plenum heater, boiler, baseboard, or heat storage	Energy Star or 12 EER

## Equipment Information - required (continued)

<b>Electric Water Heater*</b>	Date installed _____	Capacity/gallons _____	Quantity _____
Manufacturer/Brand _____		Model number _____	
Water heater type: <input type="checkbox"/> Heat pump <input type="checkbox"/> Grid enabled <input type="checkbox"/> Standard tank/light duty commercial <input type="checkbox"/> Commercial			
<b>Thermal Storage Heating or Cooling</b>	Date installed _____	Capacity/kilowatts _____	Quantity _____
Manufacturer/Brand _____		Model number _____	
<b>Electric Vehicle Charging Station</b>	Date installed _____	Capacity/kilowatts _____	Quantity _____
Manufacturer/Brand _____		Model number _____	

\*Rebates require equipment AHRI Certificate or manufacturer specification sheets to be attached.

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Otter Tail Power Company reserves the right to deny any rebate that does not meet program qualification requirements. Rebate programs may be discontinued or modified at any time.

### Rebate Application Details

- Equipment must be installed where electricity is supplied by Otter Tail Power Company.
- Rebate requests must be received for installations completed during the calendar year no later than March 31 of the following calendar year or will not be accepted.
- A dated sales receipt must be submitted with this rebate request. Bids and quotes do not qualify as a sales receipt.
- Customers must provide proof that equipment installed meets the company's currently available rebate program requirements for efficiency level, size, and/or off-peak rate application.
- Accepted proof of efficiency, where applicable, includes an AHRI certificate or manufacturer specification sheet showing efficiency levels or Energy Star rating for the model installed.
- Customer rebate requests may require review by local Energy Management or Service Representatives.
- Allow 6–8 weeks for processing.
- Rebate limits apply. Rebate programs are subject to change or cancellation without notice. Acceptance of this application does not guarantee payment. You will be notified if your application is not accepted.
- To verify rebate eligibility requirements visit [www.otpco.com](http://www.otpco.com) or call our Idea Center at 800-493-3299.
- Otter Tail Power Company is not responsible for inaccurate information supplied by appliance dealers or contractors.

### Send Completed Customer Rebate Application and required documentation to:

Idea Center  
Otter Tail Power Company  
PO Box 496  
Fergus Falls, MN 56538-0496

**Incomplete rebate applications will be returned and no rebate will be issued until all required information is provided.**

### Did you include the following?

- Your Otter Tail Power Company account number (found on your energy bill)
- Your receipt or invoice
- All equipment information required
- Proof of efficiency levels, where required
- Your signature