

VERMONT CLEAN HEAT CREDIT

Customer Information & Agreement Form

Credits may be associated with the product or service described in this document and recognized by the State of Vermont under Act 18 of 2023.

Clean Heat Credit Qualifying Energy Product Delivered Delivery Date Gallons/Tons

Clean Heat Credit Qualifying Appliance Installed Installation Date Manufacturer/Model

Name of Heating Fuel/Service Company Name of Technician/Delivery Driver

Company Address City/Town State Zip Code

Company Contact Phone E-mail

Customer Type: () Residential () Commercial Customer Name/Business

Customer Address City/Town State Zip Code

Customer Phone Customer E-mail

I hereby grant, convey, transfer, and/or assign all ownership, right, title, interest in such Clean Heat Credits associated with the installation or delivery of the above energy product, appliance, or service described in this document to the Heating Fuel/Service Company identified on this form free of any liens, claims, or security interests.

Customer Name Customer Signature Date

- I attest my household income is less than 60% state median income, according to the guidelines on the other side of this form.
- I attest my household income is less than 120% state median income, according to the guidelines on the other side of this form.
- I decline to state my income.

The information below is needed to satisfy the requirements set forth in Act 18 and the Clean Heat Standard.

Household Size	1 Person	2 Person	3 Person	4 Person	5 Person	6 Person
60% of State Median Income (SMI)	\$34,525	\$45,149	\$55,772	\$66,396	\$77,019	\$87,642
Household Size	1 Person	2 Person	3 Person	4 Person	5 Person	6 Person
120% of State Median Income (SMI)	\$69,050	\$90,298	\$111,544	\$132,792	\$154,038	\$175,284

The Public Utility Commission recommends that the following information be obtained and retained by heating service and heating fuel businesses to substantiate potential clean heat credit early action measures.

Deliverer/Installer Information

- Deliverer/Installer business name
- Deliverer/Installer contact name
- Deliverer/Installer full business address
- Deliverer/Installer full business email address
- Deliverer/Installer business phone number

Customer Information

- Address where measure was delivered/installed
- Primary contact name (customer and business, if applicable)
- Primary contact address (if different from installation/delivery address)
- Primary contact email address
- Primary contact phone number
- Account type (residential or commercial)

Clean Heat Measure Information

- Date of installation/delivery
- Description of Clean Heat Measure delivered/installed with an explanation of the scope of work that may yield Clean Heat Credits

Baseline

- **Equipment**
 - Description of baseline equipment/condition
 - * Make/model (if applicable)
 - * Fuel type (if applicable)
 - * Include any relevant equipment efficiencies and data establishing historical fossil fuel use (if applicable)
 - * Whether equipment will be removed or will remain
- **Weatherization Measures**
 - Energy audit report, initial blower test, if applicable
 - Baseline state of insulation and weatherization in the building(s)

Costs/Incentives

- Total cost of measure documented through invoices for purchase of any equipment, materials, and installation costs (assuming a physical measure has been installed at the location). Invoices should include quantities, make/models, and costs.
- Indicate cost share for the measure, if applicable (e.g., what the recipient paid, what costs were borne by the installer/deliverer, etc.)
- Other consumer incentives provided for energy, equipment or service (if known)

Measure-specific Information

- For heat pumps (all types), water heaters, solar hot water, electrical appliances providing thermal end uses and advanced wood heating, the following should also be provided:
 - * Photos of nameplates with model numbers of any equipment being replaced and of any new equipment after it has been installed
 - * Inspection notes or certifications provided related to the system
- For Renewable Propane, BioHeat, Biodiesel, Renewable Diesel, and wood pellets, the following should also be provided:
 - * Documentation of ongoing deliveries, detailing the dates and amounts (gallons) delivered and the blend provided. In the case of blended biofuels, additional documentation that certifies the actual blend percentage purchased/delivered.
 - * If no equipment is being replaced, then photos of nameplates with model numbers of existing equipment should be documented.

Any other information and supporting documentation that will help an evaluator understand where assumptions came from or other unique aspects of the operations of the measures at the location.