



## RETROFIT PROGRAM

### Get Energy Smart Retrofit Loan Program

#### Participating Contractor Agreement

I, \_\_\_\_\_, as a representative of \_\_\_\_\_, an approved Participating Contractor through the Get Energy Smart Retrofit Program acknowledge that all relevant employees in my company have read the "What to Expect" document below and commit to assist our customers in understanding the Loan Program, to providing all necessary documents that meet program specifications in a timely manner and to working with the customer and the Loan Program Administrator to facilitate the loan process and complete the work in a manner that meets program guidelines and customer expectations.

Signed: \_\_\_\_\_

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

### Loan Component Process – What To Expect

#### For the Contractor

**(Please note: Clients may be on waiting list and may approach you for a bid, while waiting to submit their application.)**

- ❖ Client comes in for a bid/proposal:
  - Client should inform you that they are part of the Get Energy Smart Retrofit Program; Please make it a habit to ask when writing up a quote for your clients
  - If the home was built prior to 1978 you must have your EPA certification to work on the home if you will be disturbing paint, Homeowner will be required to obtain a copy of this certification from you and submit with application packet.
  - Make sure the bid/proposal meets program guidelines - has all required line items. If it's for :

**Solar Water Heater:** Copy of FSEC system approval form

**Gas Tankless Water Heater:** manufacturer & model, ENERGY STAR® qualification

**Lighting Renovation:** ENERGY STAR® qualification



**Energy Star Ceiling Fans:** ENERGY STAR® qualification

**ENERGY STAR Windows and Doors:** ENERGY STAR® designation for each window or door

**Duct Repair/ Sealing:** duct repair/ sealing services provided; post-retrofit duct test to be provided (if cost >\$2000)

**HVAC-Central AC:** Verification of the ENERGY STAR® qualified equipment; Manual J calculation cost included in proposal  
Minimums for SEER/ EER (either include ratings in proposal or attach AHRI Certificate for the system to be installed):

- Split systems must have a SEER of 16 or greater and an EER of 13 or greater.
- Packaged systems must have a SEER of 14 or greater and an EER of 12 or greater.
- For ductless mini-split systems, unit must be greater than or equal to 18,000 BTU to qualify. Ductless mini-split systems must have a SEER of 16 or greater and an EER of 13 or greater.
- Must be sized by the contractor not to exceed 15% more than indicated by a Manual J calculation

**HVAC - Heat Pump:** ENERGY STAR® qualified equipment installed; Efficiency ratings: SEER, EER, HSPF and/ or COP ratings; Manual J calculation cost included in proposal

Minimum ratings for:

Air Source:

- Split systems must have a SEER of 15 or greater, an EER of 12.5 or greater, and a HSPF of 8.5 or greater.
- Package systems must have a SEER of 14 or greater, an EER of 12 or greater, and a HSPF of 8 or greater.

Geothermal:

- Closed Loop systems must have a EER of 14.1 or greater and a COP of 3.3 or greater
- Open Loop systems must have a EER of 16.2 or greater and a COP of 3.6 or greater

Direct Expansion systems must have a EER of 15 or greater and a COP of 3.5 or greater

- ❖ Client can contact proposed contractor as soon as 4<sup>th</sup> business day after their closing to schedule a date to begin work.
- ❖ OHCD sends out “contractor packet” on the 4<sup>th</sup> business day after the client’s scheduled closing date. However, if the work on the home is \$2,500 or \$7,500 for an AC unit, then a Notice of Commencement is required. OHCD will prepare the NOC and record the document. It may take up to two weeks to record the NOC. Once this is done, OHCD will then send the contractor the **Order To Proceed**.
- ❖ The contractor packet includes the **Order To Proceed** and the following which are all required by OHCD for contractor to receive payment:
  - **Rehabilitation Contract**
  - **Hold Harmless Agreement**
  - **Certificate of Payment** (to be signed by both homeowner & contractor)
  - OHCD requests that you attach an **Original Invoice** (for the amount indicated)

- **Affidavit & Release of Lien**
- Submit copy of **W-9**
- **Rebate documentation:**

HVAC:

- AHRI Certificate of product rating
- Manual J report

Duct Repair:

- Only if duct repairs were over \$2,000: Post retrofit duct test results showing on < .06 (Form at <http://www.scgov.net/retrofit/documents/DuctTestReport.pdf>)

Windows/ Doors:

- Copies of NFRC ENERGY STAR product designation labels for each installed window or door.

Insulation:

- Indication of square footage installed

- ❖ Packaging or product information showing final R-value and type of insulation. Also, if applicable all inspections must be completed and proof provided.

**Please note:**

- **The contractor must schedule a building permit inspection once work is complete. OHCD makes sure all work passes inspection and will not send the invoice for payment until there is proof of the work passing inspection.**
- If the client's proposed amount of work is over the maximum amount of the loan, OHCD requires the client to bring a check for the difference, made payable to the contractor, at their closing.
- No payment will be received until work is completed (i.e. **No initial deposits allowed**)
- It is important to send original invoice for the amount indicated by OHCD.
- The homeowner's check is mailed to the contractor as a partial payment once all paperwork has been received by OHCD (as explained above).
- Within 30 days of receiving your completed paperwork, a check for the remaining balance (Original Invoiced Amount) will be forthcoming.