



# HeatSmart Tompkins Checklist for Enrollees

***Solar Tompkins is dedicated to promoting a rapid transition to the use of renewable energy in Tompkins County and beyond. The HeatSmart program advocates all practical means of eliminating fossil fuel use in Tompkins County homes.***

## **Phase one -- The Assessment**

The installer visited my home and performed a home energy assessment that includes:

- A visual inspection of insulation, thermal imaging, and a blower door test to inventory thermal heat loss and air leaks in my home.
- This analysis of my annual heating fuel usage and estimate of my home's current state of insulation, air leaks and thermal heat loss will be detailed as part of the proposal I am presented in Phase two (see below).

## **Phase two -- The Proposal**

I have received a proposal for work to reduce heat loss and/or for installation of a heat pump system, either air source or ground-source geothermal, that includes:

- The estimated current heating demand of my home.
- At least 2 insulation and heat pump package options for me to consider, including an analysis of how increased insulation and air sealing would impact heat pump system size and cost of my project.
- The general location inside my home where work is proposed to be done.
- A list of all major equipment (manufacturer/model), and the depth and expected R-value of any proposed insulation.
- Pricing and details for the equipment and/or the insulation/air sealing products that match those on the HeatSmart pricing guide (available at [www.solartompkins.org](http://www.solartompkins.org)).
- An explanation of how prices were arrived at based on the Installer's base price and HeatSmart-recognized cost adders for each improvement type.
- Pricing detail for electrical, mechanical, or structural considerations that are beyond the pricing guidelines.
- A statement of available incentives and/or tax credits that I may be eligible for to reduce the overall cost of my project.
- The estimated energy and cost savings from at least 2 proposed package options.
- At least one financing option for each proposed package, including the interest rate, term, and resulting monthly payment.

## **Phase three -- The Contract**

I have received a final contract offer that includes:

- The information that was in my proposal, but in final form, based on a complete energy model of my house.
- A diagram of equipment placement (e.g. GSHP loop field or ductless ASHP unit(s))
- An outline of the warranty or warranties for equipment and/or services.
- An estimated installation date for my home energy project once the contract is signed
- A timeline for payments required to complete my home energy improvement project.

***SolarTompkins appreciates your choice to participate in the HeatSmart program as we continue our effort to significantly reduce the use of fossil fuels in our community. You are an important part of this mission and are contributing to its achievement. Thank you!***