

The following Terms and Conditions establish the eligibility requirements for participation in the **Existing Homes Incentive Program** (Program).

Existing homes are defined as any home built more than six (6) months prior to installations, replacements, and/or upgrade of energy efficient home improvement.

Reservation of Funds and Request for Rebate are subject to approval under the Program. A Reservation of Funds or Request for Rebate is neither a guarantee of eligibility for a rebate under the Program, nor payment of the rebate itself, and is subject to the following Terms and Conditions:

1. The Program is between **January 1 and December 15, annually**, with an application window for Reservation of Funds and Request for Rebate open between April 1 and December 15, annually, or until a time in which Program funds are fully subscribed.
2. The Existing Homes Incentive Program has a Reservation of Funds option, or residents can move directly to Request a Refund if all program criteria are met. Reservation of Funds and/or Request for Rebate will be available until Program funds are fully subscribed and/or disbursed.
 - Reservation of Funds works on a ‘first come, first served’ basis, and funds will be reserved in the order the request is received.
 - Reservation of Funds submissions will be declined if they are incomplete, illegible, or do not qualify for program participation, and a new Reservation of Funds submission will be required that will be processed in the order it is received.
3. An approved Reservation of Funds offers security to Existing Homes Incentive Program Participants that rebates will be available at time of Request for Rebate. **If you do not have an approved Reservation of Funds and submit a Request for Rebate, you will only receive a rebate if there are funds available.**

Reservation of Funds request must be submitted to The City’s HAT Smart system for review and approval by the HAT Smart team.

- Applicants will receive notification of Reservation of Funds rejection or confirmation of approval.

- Upon receipt of confirmation of Reservation of Funds, Applicants will be required to complete the following:
 - Submit a valid pre-renovation EnerGuide Home Evaluation within 60 days of confirmation of Reservation of Funds.
 - An EnerGuide Home Evaluation includes the EnerGuide Label, Home Owner Information Sheet, and Renovation Upgrade Report.
 - If a pre-renovation EnerGuide Home Evaluation is not received within 60 days, Reservation of Funds is automatically cancelled, and funds are made available for other program participants.
 - Submit all required Project paperwork within 180 days (6 months) of submission of the EnerGuide Home Evaluation OR before the end date of the Program (December 15, annually), whichever comes first.
 - A new request for Reservation of Funds application is recommended for additional renovations not included on the original application which are intended to be completed within the Program Term. New requests for Reservation of Funds will be processed in the order they are received and are subject to processing as described in these Terms and Conditions.
- If additional renovations are completed, and there is no approved Reservation of Funds for these renovations, you will only receive a rebate if there are funds available.

4. The Existing Homes Incentive Program has a Request for Rebate requirement;

- Requests for Rebate will be declined if they are incomplete or illegible, and a new Request for Rebate submission will be required and will be processed in the order it is received.
- Requests for Rebate must be received on or before the end date of the Program (December 15, annually) in order to qualify for rebates under the Program.

5. Pre-renovation and post-renovation EnerGuide Home Evaluations are required for participation in the Existing Homes Incentive Program.

EnerGuide Home Evaluations must be obtained under the EnerGuide Rating System v.15 and must be completed by a Natural Resources Canada registered energy advisor with a current City of Medicine Hat Business License; a list of service providers can be found on Natural Resource Canada's website.

- The pre-renovation EnerGuide Home Evaluation includes the Homeowner Information Sheet and EnerGuide label plus the Renovation Upgrade Report and describes your homes current energy performance prior to home renovation.
 - The post-renovation EnerGuide Home Evaluation includes a Homeowner Information Sheet and EnerGuide label which verifies and quantifies your homes new energy performance following your home renovation.
6. Applicants are responsible for all costs associated with the EnerGuide Home Evaluation and must pay the Energy Advisor directly.
 7. To be eligible for a rebate under the Program:
 - Only renovations identified in your EnerGuide Home Evaluations Renovation Upgrade Report, and those which are included in the Existing Homes Incentive Program, will be considered eligible for the Existing Homes Incentive Program.
 - All materials associated with the renovation must be purchased and within the annual program term (January 1 to December 15) as evidenced by required documentation attached to any Request for Rebate submitted into The City's HAT Smart system.
 - All equipment must be purchased in Canada. Online purchases are only eligible if they are ordered from an online distributor in Canada
 - Applicants must receive a City of Medicine Hat residential electric and/or natural gas utility statement for the Project address in their name or, for

rental homes, be named as the home owner on the land title or property assessment roll.

- Requests for Rebate must be completed by the home owner as confirmed through the City of Medicine Hat billing system.
 - HAT Smart Incentives are not available for commercial entities. So, if you live in a condo and your utilities are paid for through your condo fees or by the condo association, you would not be eligible for Existing Homes Incentive Program rebates since the condo building itself would be considered a commercial enterprise.
- 8. Funds will be disbursed, to a maximum of \$5,000 over the lifetime of the Existing Homes Incentive Program, based on the total number of upgrades Applicants intend to complete within the Program Term. The Existing Homes webpage has a list of eligible renovations, associated criteria, rebate amounts, and required documentation.
- 9. Rebates are paid based on renovations completed during the Program Term, and rebates will be calculated and paid up to a maximum qualifying amount for individual rebates.
 - If approved, rebates are paid directly to the home utility account or by direct deposit through electronic funds transfer.
 - For rental homes, the legal home owner may contact HAT Smart directly to discuss reimbursement options
 - The Applicant should allow four (4) weeks for The City to process the Request for Rebate and issue payment
 - HAT Smart rebates are paid based on pre-tax amounts.
 - Should the Existing Homes Program be repeated in subsequent years, rebates for installation of additional windows and doors, as well as

insulation, in areas not previously renovated will be eligible. Rebate amounts will be based on the maximum for the application year, less the rebate amount previously paid up to the maximum \$5,000.

10. The Applicant is solely responsible for:

- researching and ensuring they qualify under applicable eligibility criteria as outlined on the Existing Homes Incentive Program webpage;
- meeting all Program requirements and complying with any laws, regulations, or by-laws regarding permits, codes, restrictions, and/or inspections in relation to products or equipment installed;
- any direct or indirect taxes, duties, levies, fees, or like charges incurred as a result of participation in the Program;
- retaining a copy of the Reservation of Funds and Request for Rebate forms and all required documentation; these will not be returned to the Applicant by HAT Smart; and
- ensuring contractors are appropriately certified and qualified to conduct the work.

11. The Applicant acknowledges and agrees that, as a result of projects completed as recommended by a Natural Resources Canada registered energy advisor and described in the EnerGuide Home Evaluation Report, HAT Smart:

- is not responsible for, and accepts no liability nor makes any representations with respect to estimated or potential energy savings;
- is not responsible for, nor liable for, the selection, purchase, installation, and ownership/maintenance of the products included in the Request for Rebate; and
- makes no representation or warranty, whether expressed, implied, direct or indirect, with respect to the products, services or other measures that the Applicant has purchased.

12. The Applicant further agrees:

- Energy efficient home renovations have been completed by a professional contractor in the specified property, and that all service

providers have a current City of Medicine Hat Business License and that purchases and installations are of new condition and for non-commercial use only;

- that HAT Smart is not affiliated in any way with the manufacturer, distributor, dealer, and/or installer of the product(s);
- that combined incentives from government programs shall not exceed 100% of final Project costs;
- to disclose rebate amounts received, or to be received, from complementary municipal, provincial, and/or federal government programs; and
- any other rebate(s), discount(s) and/or incentive(s) offered and/or provided by any government agency, institution, manufacturer, distributor, dealer and/or installer are separate and distinct from the Program and HAT Smart shall not be responsible for the administration or payment of the same nor be responsible for the erroneous submission of other rebate(s), discount(s) and/or incentive(s) to HAT Smart.

13. In submitting a Reservation of Funds and/or Request for Rebate, the Applicant consents:

- to the disclosure of personal information, as well as the rebate amount awarded to the Applicant, to HAT Smart, its contractors, employees, partners and others who have a need to know; and
- to the collection, use, disclosure and retention of such information for five years, following which such information will be destroyed or made anonymous.

14. The Applicant must be in good standing with the City of Medicine Hat. The City of Medicine Hat reserves the right to define what good standing entails, and this includes, but is not limited to:

- The Applicant must have never been in collections for a property in the City of Medicine Hat.

- If the Applicant has any current or previous enforcement, compliance, licensing, legal, or other issues with the City of Medicine Hat they may be deemed ineligible.
15. HAT Smart reserves the right to change or terminate Incentive Programs at any time without notice or explanation. HAT Smart will use reasonable efforts to process any complete Request for Rebate received prior to Incentive Program changes or termination according to individual Incentive Program requirements in effect on the date Reservation of Funds or Request for Rebate was received.