



# Town of Shelter Island

## Water Quality Improvement Rebate

### FLOWCHART AND PROCESS SUMMARY

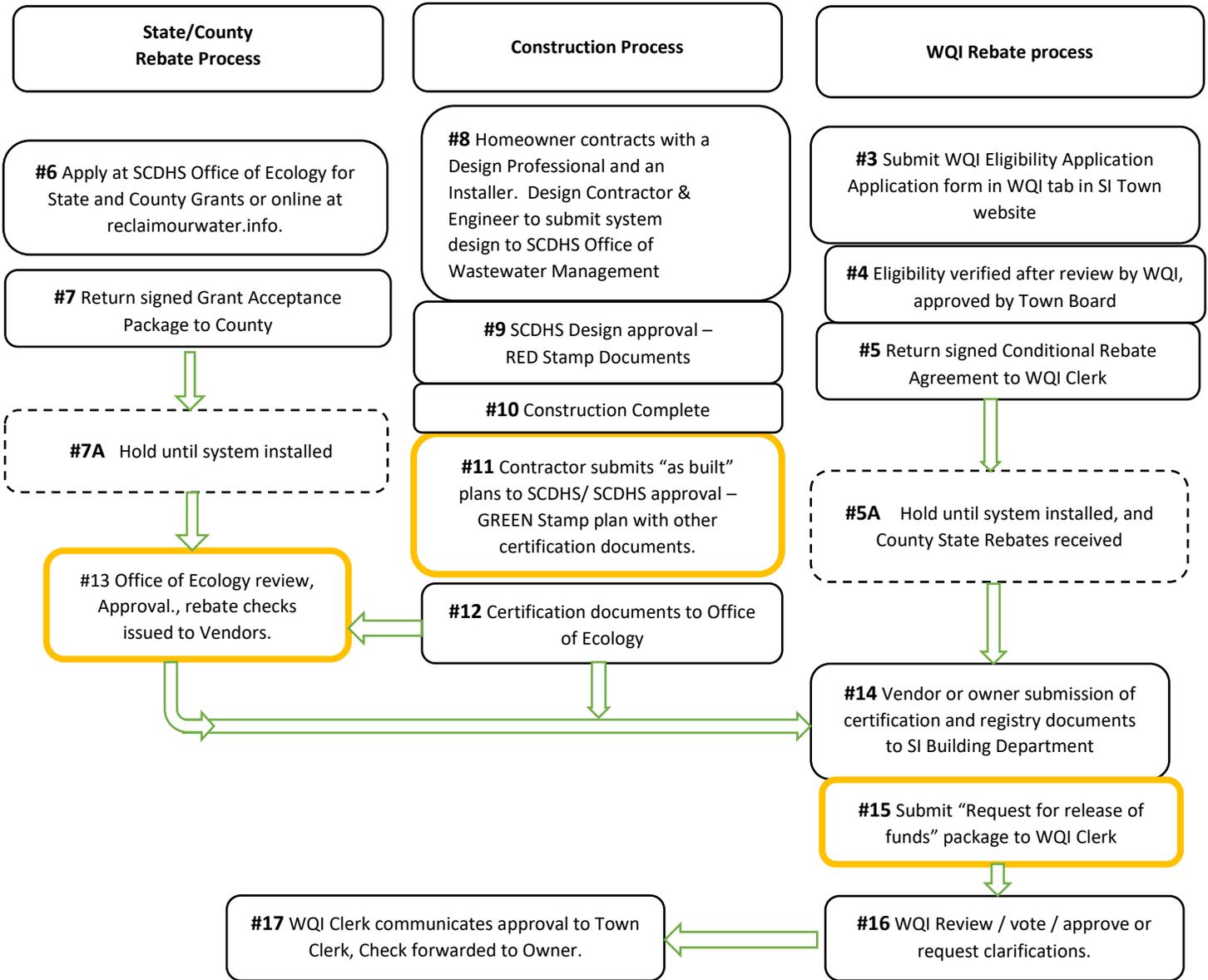
Outlines the full 12 to 18-months Application and Construction Process

**Do Your Homework**

**#1** Voluntary upgrade: Research suppliers / Review WQI Policy / Design Engineer Letter.

*Or*

**#2** Emergency Replacement/ Catastrophic system failure – SCDHS accelerated upgrade.





## Process Summary

There are many organizations involved in this process, including:

- (1) Shelter Island WQI Advisory Board, Building Department, and Town Board,
- (2) SCDHS Office of Wastewater Management [SCDHS Wastewater]
- (3) SCDHS Office of Ecology for State and County Grants [SCDHS Ecology]
- (4) Design Professional (engineer or architect) (designs layout of the system),
- (5) Vendors including the primary I/A installers, plumbers, electricians, and occasionally others.

**1. Voluntary Upgrade** – Do your research on the new low-nitrogen septic treatment systems – talk to a design professional engineer or architect to determine what is the best system for your situation. Contract with a design professional. Discuss your project with a septic system installer. Review the WQI FUNDING POLICY and RESTRICTIONS. This describes the size of potential rebate, what expenses will or will not be covered, and limits to future construction.

**2. Emergency Replacement** – Accelerated design and installation under direct SCDHS engineering supervision, typically for collapsed cesspit/cesspool. See note on page 4.

**3. WQI Rebate Process** – Submit a Shelter Island Town eligibility application to determine if you are eligible for the Shelter Island I/A Rebate Program. Homeowner applies for Shelter Island Town Rebate with assistance from Engineer and Vendor.

The Application forms can be picked up from the Town Clerk's office (hard copy of application) or online on the Shelter Island Town website (under 'Forms'). Submit your Shelter Island application and documentation to the WQI Advisory Board Clerk.

**4. WQI Rebate Process** – The WQI Advisory Board will evaluate your application and make a recommendation to the Town Board whether to allocate funds to support your project. Applications will not be evaluated if any of the required documents are missing from the submission.

**ALL APPLICANTS ARE REQUIRED to apply for the Suffolk County and NY State Grant Septic Improvement Programs.**

Visit <http://www.reclaimourwater.info/Home.aspx> to fill out the application paperwork or call Suffolk County Department of Health Services at 631-852-5811.

**5. WQI Rebate Process** – Conditional Rebate Agreement. If funding support is authorized by the Town Board, the Town Attorney will issue to the applicant the following documents:

1. Low-Nitrogen Sanitary System Conditional Rebate Agreement, and
2. Certified Release of Septic Information.

*These documents must be signed and returned to the Town Attorney within 30 days of receipt.*



If the size, manufacturer, design professional, installation contractor or other details of your application are changed after approval OF THE Conditional Agreement, the homeowner must submit an update explaining the change to the WQI Advisory Board. Failure to accomplish this may impact final authorization of your rebate.

## Process Summary

**5A. WQI Rebate Process – “HOLD” EXPLANATION.** Please note that the release of the Shelter Island rebate is dependent on the speed of the I/A installation and approval. and for the release of funds to vendors from Suffolk County and New York State. This can be a one or two-year process.

**6. State and County Grant Process –** Homeowner applies for the Suffolk County Department of Health Services Office of Ecology (SCDHS Ecology). Online at [reclaimourwater.info](http://reclaimourwater.info) or by paper application.

- a. In 8-12 weeks, the SCDHS Ecology will review the application and either request additional information or send the homeowner a Grant Acceptance Package.
- b. Grant Acceptance Package contains a Grant Certificate, Grant Agreement and Application for the State Grant.

**7. State and County Grant Process –** Homeowner signs and returns Grant Agreement and State Grant Application to the SCDHS Ecology.

**7A. State and County Grant Process – “HOLD” EXPLANATION.** Release of funds from the Office of Ecology to vendors from Suffolk County and New York State can only occur after the installation has been completed and the system has been certified by the Office of Wastewater Management. This can be a one or two-year process.

**8. System Construction –** Homeowner submits Vendor/Installer estimate to the County along with the Assignment of Payment form (which the Homeowner will receive from the County). Homeowner contracts with a Design Professional and a Vendor/Installer. Design Professional completes a permit application (Design) and submits it to the Suffolk County Department of Health Services (SCDHS) Office of Wastewater Management. The system design must be created by a New York State Licensed professional engineer or architect. A SCDHS Wastewater approved I/A OWTS installation contractor hired, any other required permits are secured if necessary (Town/Village/NYSDEC). SCDHS Wastewater issues a permit to construct with a RED STAMP on the plans.

**9. State and County Grant Process –** Homeowner submits Vendor/Installer estimate to the Suffolk County Office of Ecology (SCDHS Ecology) along with the Assignment of Payment form (which the Homeowner will receive from the SCDHS Ecology).

**10. System Construction –** Once the Assignment of Payment form is accepted by SCDHS Ecology the installation of the system can begin. The installation starts and continues to completion.

- a. Pump and Abandon old sanitary system.
- b. Install I/A system and connect to the effluent leaching system (new or existing leaching pool), or a Pressurized Shallow Drainfield (PDS).
- c. Electrician hooks up control panel.



- d. SCDHS Wastewater inspection at startup.
- e. Other vendors

## Process Summary

**11. System Construction** – Engineer submits As-Built Plans to SCDHS office of wastewater management for final approval. If approved, a GREEN STAMP is applied to the plan with other certification documents. The SCDHS Wastewater Management office will issue final approval on the job by returning the As-Built plan with a GREEN stamp.

**12. System Construction** – Engineer submits Certification forms, I/A OWTS Registration Form, Operation and Maintenance (O&M) agreement from the maintenance provider, Payment Vouchers and Invoices to the SCDHS Ecology

**13. State and County Grant Process** – SCDHS Ecology review of documents, approves, and issues rebate checks directly to Vendors.

**14. WQI Rebate Process** – After Green Stamp is issued, the applicant must complete the following items with the Shelter Island Building Department:

- a. A “ Shelter Island Septic Registry” form,
- b. A “Shelter Island Well Registry” form,
- c. A copy of the SCDHS ‘Green’ Stamp” Final Survey cover page (to be included in the Request for Payment submission to the WQI).

**15. WQI Rebate Process** – Upon final completion of your new I/A System complete and submit to the WQIAB Clerk the **Request for Payment and Calculation** Form with Checklist with a copy of each PAID Invoice and any supporting documentation for WQIAB for Payment.

**16. WQI Rebate Process** – The WQI reviews the release of funds information, determines if the funding request is appropriate, or if not appropriate, reviews concerns with the owner.

**17. WQI Rebate Process** – If appropriate the Town Clerk will issue check the owner.

**Emergency Replacement** - An I/A upgrade due to catastrophic failure, typically for an unsafe collapsed cesspit/cesspool or conventional septic system. In this situation an accelerated design and installation under direct SCDHS engineering supervision may be required. This is an abbreviated process from the voluntary upgrade described in this summary. Contact WQI for application requirements for Shelter Island funding. Application to the County and State rebate programs is still required.



## Town of Shelter Island

### Water Quality Improvement Rebate

# FUNDING POLICY AND RESTRICTIONS

***NOTE: Please carefully review the list of regulations and explanation of application requirements***

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## A. INTRODUCTION

The objective of the Shelter Island Innovative/Advanced On-Site Wastewater Treatment System Rebate Program is to provide financial assistance to homeowners to voluntarily replace a cesspool or conventional septic system for the installation of advanced waste reduction systems. Innovative and Alternative Onsite Wastewater Treatment Systems (I/A OWTS) and Pressurized Shallow Drainfields (PSDs) reduce Nitrate contamination in our aquifer by converting it into harmless Nitrogen gas. PSDs also enhance the biologic decomposition of pharmaceuticals, emerging contaminants of concern, and other organic compounds.

The program is administered by the Water Quality Improvement Advisory Board (WQI AB) and the Town Building Department. Funding support must be authorized by the Town Board.

## **B. CATEGORIES OF REBATE GRANTS**

### **B.1. Rebate Categories**

Eligible costs that have not been reimbursed by the State and Suffolk County will be reimbursed up to the Shelter Island Base and Incentive rebate grants allocated to the installation by the Town Board. The three categories for septic improvement installations are 1) the basic I/A system and 2) the installation of a PSD system, and 3) well relocation if mandated by the SCDHS. Authorized rebate grants will be merged as a single sum to represent the maximum reimbursement when calculating the amount that can be authorized for rebate payment.

### **B.2. Base Innovative Advanced OWTS Grant**

The maximum Base Grant that can be allocated to a project is \$12,000. Approval of the Base Grant is based on an evaluation of the benefit (Nitrate reduction) to be provided to the aquifer. The evaluation includes:

1. Location Sensitivity
2. Nitrate Reduction Scoring (Kilograms per year)
3. Type and/or condition of Existing System

### **B.3. Additional Incentives**

To support I/A installation the WQI AB has the discretion to recommend to the Town Board additional incentives, with the goal of encouraging installations in environmentally sensitive areas of the island and/or reimburse unique or unanticipated installation costs.

### **B.4. Pressurized Shallow Drainfield Grant**

Homeowners who install a Pressurized Shallow Drainfield system (rather than installing new or use an existing less effective leaching pool) are eligible for an additional grant. The PSD provides additional reduction of Nitrate contamination and reduces contamination of pharmaceutical and other compounds from the aquifer. This rebate may only be granted in conjunction with an I/A system installation.

To support installations of this system, a \$5,000 grant for the system will be awarded. Per section B.1. above this amount will be in addition to the Base and Well Relocation grants when establishing the maximum rebate for the project.

**B.5. Suffolk County Mandated Private Well Relocation grant.** A \$4,000 rebate will be provided if the Suffolk County Department Health Services (SCDHS) *mandates* relocation of the homeowner's private well to install an I/A system. Payment status of this grant will be determined based on SCDHS and Contractor document evidence to be provided in the "Septic Rebate Release of Funds (Form #2)" at the close of the project. This rebate may only be granted in conjunction with an I/A system installation. Per section B.1. above this amount will be in addition to the Base and PSD grants when establishing the maximum rebate for the project.

## **C) Expenses Eligible or Not Eligible for Rebate**

### **C.1 - Appropriate expenses**

Financial support covers many but not all the costs associated with the replacement of a current ineffective waste system with an I/A OWTS. Covered expenses include equipment, labor, materials, and excavation causally related to the removal of the current sanitary system and installation of the I/A OWTS. Only the expenses deemed to be appropriate and necessary for the replacement of the system on the specific property are covered. In determining whether a cost is appropriate and/or necessary, the WQI AB will consider the usual and customary costs of certain equipment, materials, and labor, as well as any characteristics of the property that may aid or hinder the replacement. No expenditure shall be reimbursed, unless sanctioned by law and authorized by the Town Board. The homeowner must provide a full accounting of such costs for the project to the WQI AB and the Town Board.

#### **Examples of expenses appropriate for rebate:**

- Engineering inspection and design
- Survey maps
- Equipment
- Labor
- Materials
- Excavation or soil sampling required by SCDHS
- Relocation of private well if *mandated* by the SCDHS because of the I/A OWTS installation
- Costs for installation of a Pumped Shallow Drainfield system
- Requirements *mandated* by the SCDHS to meet their system design criteria
- Electrical and Plumbing installation directly associated with the I/A installation
- Salt brine redirection from a water treatment system to a dry well separate from the I/A
- Leveling/grading and seeding after installation
- Abandonment of obsolete septic or leaching pool

### **C.2 - Expenses unsuitable for rebate**

- An I/A OWTS installation mandated by Town Code or the SCDHS.
- Rehabilitation of landscaping other than leveling and seeding of lawn areas (e.g., installation of trees, shrubs, garden areas, etc.)
- Projects which have as their primary purpose the accommodation of new growth as opposed to remediation of water quality.
- Ordinary maintenance or repair of existing facilities
- New construction, including replacement of tear-down buildings.

**D. RESTRICTIONS ON I/A OWTS CAPACITY, MANDATED UPGRADES and TIME LIMIT ON FUTURE HOME IMPROVEMENTS**

**D.1 I/A System Capacity Limitation**

Rebates shall cover only those expenses associated with installation of a Nitrate reducing septic system which is the lowest capacity system recommended by the manufacturer for the current legally existing structure, as determined by the SCDHS (General Guidance Memorandum #19, dated April 12, 2005, subject to change). An applicant may install a higher capacity system using the applicant’s own funds to make up the difference in cost for purchase and installation between the lower and higher capacity system.

**D.2 Homeowner Initiated and SCDHS or Town building code mandated system upgrades**

WQI rebate eligibility may be authorized when the homeowner/applicant *voluntarily initiates* the process for removal of a Cesspool or a Conventional Septic System and upgrades to an I/A OWTS for the purpose of decreasing Nitrate contamination waste effluent. The SCDHS or the requirements of the SI Town Code may initiate a regulatory mandate to upgrade a Cesspool or a Conventional Septic System to an I/A OWTS as part of a review of home construction or other regulated change to the property. WQI policy bars providing rebates for an I/A OWTS when upgrading to an I/A OWTS is mandated by SCDHS or Section 43-10.4, Code of Shelter Island.

By WQI policy, I/A OWTS installation due to Catastrophic Cesspool failure, as defined by the SCDHS, is eligible for rebate support, regardless of the project’s benefit scoring in part B.2. See section D.4 regarding Time Limit on Future Home Improvements.

By WQI policy, replacement of a home after a “tear down-demolition” of an existing home as defined by section 43.8 Demolition Permits in the Shelter Island Code is considered new construction and is not eligible for rebate support.

**D.3 Reserved**

**D.4 Time Limit on Future Home Improvements**

The Conditional Rebate Agreement between the Owner and the Town limits expansion of the property for a three-year time period. This time period is based on the date the “Red Stamp” system design has been issued by the SCDHS. Violation of this agreement may subject the owner to the following penalty.

<b>Three-year Expansion Restrictions</b>		
<b>Expansion without increase in design flow (as determined by SCDHS) (Example #1)</b>	<b>Expansion with increase in Design Flow (as determined by SCDHS) (Example #2)</b>	<b>Any expansion &gt;1500 sq. ft. regardless of Design Flow (Example #3)</b>
OK – rebate agreement remains fulfilled, return not required	Expansion not allowed, rebate must be returned to the Town	Expansion not allowed, rebate must be returned to the Town

Example #1 - Rebate return to SI is not necessary when owner installs a deck, garage, uninhabitable accessory structure, swimming pool, that the SCDHS determines does not change the existing Design Sewage Flow. Addition must be less than 1500 sq. ft. and may be for an I/A appropriately sized or larger than required.

Example #2 - Expansion where owner installs or wishes to install additional space in the structure that the SCDHS determines will INCREASE the Design Sewage Flow of the property. Funding support is not allowed. The rebate must be returned to the Town since the 3-year limitation from the date of the Red Stamp approval by SCDHS is in effect. Examples of disallowed expansion include addition of bedrooms, a change in floor plan that results in the reclassification of non-bedroom rooms causing an increase in the design flow of a home, and accessory structures.

Example #3 - Expansion where owner installs or wishes to install additional space with an expansion greater than 1500 square feet. By Town Code any expansion over 1500 sq. ft. is categorized as “New Construction” and not eligible for a rebate. The rebate must be returned to the Town since the 3-year limitation is in effect.

#### **D.5 Voiding of Rebate Conditional Agreement and Extraordinary Exceptions**

If improvements in section D.4 violate restrictions, the prior rebate approval becomes void. The applicant is not eligible for any portion of the rebates, and any payments made to the applicant pursuant to this grant must be returned to the Town. Should the applicant fail to return the funds when requested, the applicant agrees to pay the Town’s legal fees in connection with the Town's recouping of the funds.

EXCEPTION: If an expansion is for the purpose of creating Affordable Housing the Town Board may rescind the three-year limitation on improvement plans as a variance to this policy. Homeowners must register with the Community Housing Board for this variance to be considered.

EXCEPTION: In the event of a change in ownership, after the WQI rebate has been paid to the prior owner, the three-year limitations on property improvements in section D.4 are canceled. The new owner is not subject to the limits in section D.4.

### **E. DEFINITIONS**

***Block, Brick, or Metal Cesspool as categorized by SCDHS definition*** – An existing cesspool that is fabricated from metal, individual concrete block, brick or material other than precast concrete is considered failed by the SCDHS regulations. Septic system upgrades are eligible for WQI rebates *regardless of the eligibility scoring criteria*, provided the emergency replacement is not associated with expansion of the house or other land use actions that would cause the upgrade to be mandated by SI Town Code Section 43-10.4.

***Catastrophic Emergency Cesspool Failure***– A determination from the SCDHS that an existing cesspool or conventional septic requires accelerated emergency replacement to maintain safety. Emergency cesspool system replacements are eligible for WQI rebates *regardless of*

*the eligibility scoring* criteria, provided the emergency replacement is not associated with expansion of the house or other actions that would cause it to be mandated by SI Town Code Section 43-10.4. Limitations on future home expansion or other timing limits are determined by the Design notice from the SCDHS Wastewater Management (“Red Stamp” engineering plans are not generated for Catastrophic Emergency Cesspool replacements).

**Contractor - Operation and Maintenance (O&M) provider** - A private entity hired by a homeowner to provide tasks required by the SCDHS and/or the manufacturer of the I/A OWTS including, but not limited to, cleaning, inspection, and adjustment of control settings to ensure proper operation of the I/A OWTS and related components.

**Design Professional** – An Engineer or Architect licensed or registered in the State of New York and authorized by the State Education Law to design the installation of an I/A OWTS and Pressurized Shallow Drainfield.

**Homeowner Initiated I/A OWTS Upgrade**– An I/A OWTS upgrade voluntarily initiated by a homeowner for the purpose of decreasing Nitrates and other contaminants from their waste effluent, except for mandatory upgrade pursuant to Section 43-10.4 of the Shelter Island Town Code.

**I/A OWTS Registration** - The approval process by which a Homeowner/Installation Contractor/Design Engineer completes and submits documentation required by the SCDHS to certify ownership and use of an I/A OWTS in accordance with Suffolk County Sanitary Code Section 760-1905 (I/A OWTS Registration Requirements). This includes arrangements for periodic maintenance by the Operation and Maintenance (O&M) provider.

**Leaching Structure, Innovative (“Pressurized Shallow Drainfield”, ‘PSD’)** – A structure placed just below grade which distributes I/A OWTS effluent to a piping system to allow soil organisms to convert Nitrates and other contaminants into less harmful compounds.

**Leaching Structure, Traditional (“Leaching Pool”)** – A concrete or other structure placed significantly below grade which distributes conventional septic tank or I/A OWTS effluent to allow it to infiltrate the surrounding subsoil. Provides poor conversion of Nitrates due to depth of distribution into subsoil.

**Onsite Wastewater Treatment System – Cesspool or Cesspit** - Any “single stage” buried chamber, including, but not limited to a perforated metal tank, perforated concrete or block vault or hollow excavation. A Cesspool receives direct discharge of wastewater for the purpose of collecting solids and releases effluent liquid directly into the surrounding subsoil without the aid of a leaching structure.

**Onsite Wastewater Treatment System – Conventional Septic System** – A “two stage” onsite sanitary system consisting of 1) a watertight chamber “septic tank” used for the settling,

stabilizing and anaerobic decomposition of sewage that does not have any active aeration or mechanical means of treatment or any supplemental filtration components and 2) any associated interconnecting piping, leaching structure(s) and any associated interconnecting piping.

***Onsite Wastewater Treatment System – “Design Sewage Flow” or “Capacity”*** – Gallons of waste a septic system such as an I/A OWTS must be capable of treating is determined by the SCDHS based on the structure and floor plan of the building. Frequently mis-interpreted simply as the number of bedrooms, the floor layout of other rooms may impact the SCDHS count. Determined by the SCDHS per “General Guidance Memorandum #19 Procedures of the Office of Wastewater Management for Classifying Bedrooms within Dwellings”, currently dated April 12, 2005, subject to change.

***Onsite Wastewater Treatment System – Innovative and Alternative Onsite Wastewater Treatment System(s) (I/A OWTS)*** - An advanced onsite “two stage” wastewater treatment system that is designed to reduce total Nitrate in treated effluent to no more than 19 mg/l. The system consists of 1) the primary tank that operates through aeration and mechanical means to reduce Nitrate contamination with other supplemental filtration components and 2) any associated interconnecting piping, leaching structure(s) and any associated interconnecting piping.

***SCDHS or SI Town Initiated I/A OWTS Upgrade***– An upgrade from a Cesspool or Conventional Septic that is mandated as a result of building permit review of the owner’s planned construction for an addition, accessory building, waste system relocation due to the installation of a swimming pool, driveway, deck, shed, patio, or other land use action. SCDHS or SI Town Initiated mandated I/A system upgrades are not eligible for WQI rebate funding.



## Town of Shelter Island

### Water Quality Improvement Rebate

# APPLICATION FORM AND INSTRUCTIONS

## *How to Complete Application to Determine Eligibility*

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This application form is used by the WQIAB to determine eligibility for residential advanced septic treatment system rebates. After the WQIAB has evaluated the information the Town Board must. Payment of rebates for appropriate expenses is provided after the system has been installed and certified by the SCDHS – this may take a year or longer.

### **Filing Instructions:**

One printed hard plus PDF of all documentation, including signed forms must be delivered to Catherine Ryan, WQIAB Clerk. Deliver in-person at 38 N. Ferry Road, Shelter Island, NY, or via USPS: P.O. Box 970, Shelter Island, NY 11964-0970 plus a PDF copy emailed to [cryan@shelterislandtown.gov](mailto:cryan@shelterislandtown.gov).

### **Details on some items**

2e “Occupancy Days” are *estimates* used to determine the mass of Nitrates that will be eliminated by installation of an I/A system – ‘ballpark’ residency numbers are fine.

4h Note that you *must* file for County and State rebates to be eligible for Shelter Island funding support.

5a At this stage of the process it is *not* necessary to have the final design for the I/A system – hand drawn on a copy of the survey is adequate (submit the final design survey page if it has already been completed).

5c This section will be satisfied by either a letter retaining a design engineer or architect, or a copy of the final design (if already done).

# Water Quality Improvement Rebate Application Form

## DOCUMENT ACCESS REQUIREMENT

The applicants authorize the WQIAB and/or the Town of Shelter Island to have access to the Suffolk County Department of Health Service documents regarding septic installation design, grants, and other information pertinent to this application.

Print Name \_\_\_\_\_

Signed \_\_\_\_\_ Date \_\_\_\_\_

## SECTION 1 - CONTACT INFORMATION

 Fill in all sections as appropriate.

- 1a) Owner's name -Click or tap here to enter text.
- 1b) Shelter Island Street Address -Click or tap here to enter text.
- 1c) Shelter Island PO Box, Post office, zip - Click or tap here to enter text.
- 1d) Off-Island address (if applicable) -Click or tap here to enter text.
- 1e) Primary contact cell phone # - Click or tap here to enter text.
- 1f) Shelter Island landline (if applicable) - Click or tap here to enter text.
- 1g) Off Island landline phone (if applicable) - Click or tap here to enter text.
- 1h) Email address(s) - Click or tap here to enter text.

Click or tap here to enter text.

## SECTION 2 RESIDENCE USAGE and DESCRIPTION INFORMATION –

Fill in all sections as appropriate.

- 2a) Year or age of home- Click or tap here to enter text.
- 2b) Number of bedrooms (as determined by your Design Professional) - Click or tap here to enter text.
- 2c) Is this your primary or second home?  Primary Residence  Second home
- 2d) Is this structure owner occupied or a rental property? Click or tap here to enter text.
- 2e) Provide an estimate of the number of people and occupancy days, based on last year's use pattern:

Usage by:	Number of individuals	Days annually
1. Primary residents	Click or tap here to enter text.	Click or tap here to enter text.
2. Guest residents	Click or tap here to enter text.	Click or tap here to enter text.
3. Summer Rental	Click or tap here to enter text.	Click or tap here to enter text.



4e) Name of SCDHS approved Installation Contractor Click or tap here to enter text.

4f) Project Cost (estimated) \$ - Click or tap here to enter text.

4g) Owner's plan for periodic maintenance of system -

installer of the I/A system  other (describe) - Click or tap here to enter text.

4h) Homeowners *must apply* for the Suffolk County and NY State grants *to be eligible for a Shelter Town Rebate*. If the State or County decides that you are not eligible for a grant, you will be asked for proof of that decision when you request payment of the Town Rebate after installation of your I/A OWTS unit.

Have you applied for Suffolk County and NY State Grants for this project?  yes  no

4i) If the project requires a relocation of the well "Well Registry" paperwork must be filed with the SI Building Department before a rebate can be awarded.

### SECTION 5 REQUIRED REFERENCE DOCUMENTS

5a) Attach a draft or final site Survey document illustrating installation area of the I/A. The location of the I/A on the survey can be hand drawn onto a copy of the current survey document. It is not necessary to have an official survey illustrating the system location at this stage of the application. [attach]

5b) Well Water source or municipal water system?  Private Well  Public System

If Private well - If available, please provide a copy of a water quality test report. Not mandatory.

If Public water source - which public system is the property serviced by?

SI Heights  West Neck  Dering Harbor

5c) A letter from a New York State Licensed design professional or professional engineer, or architect who has been retained by the homeowner for design work of the system is required.

[Attach certification letter or design drawing]

5d) Provide specifics (capacity and types) of water treatment systems on site.

- Whole-house Reverse Osmosis  Partial service line Reverse Osmosis  
 Iron/manganese reduction  Water softening  Sediment Filtration  
 pH adjustment system  Chloride (salt) reduction  
 Other (describe) - Click or tap here to enter text.  None

**Note** If an existing osmosis or other water treatment system's backwash/purging fluid is directed into the obsolete existing septic system or cesspool SCDHS will mandate a separate dry well.

Discharge backwash/purging fluid during recycling must be dispersed into a separate dry well from the I/A system.

Document Checklist :

- Site Survey document with septic location noted (see 5a)
- Water test report – if available, not mandatory (5b)
- Engineer certification retention letter or professional engineering design letter (see 5c)

**APPLICATION SUBMISSION:**

Send a PDF of all documents to the email address below, and mail or drop off two hard copies of the APPLICATION, REQUIRED REFERENCE DOCUMENTS and WATER TEST RESULTS to:

Town of Shelter Island  
38 N. Ferry Road  
P.O. Box 970  
Shelter Island, NY 11964-0970  
Attn: Catherine Ryan, WQIAB Clerk  
[cryan@shelterislandtown.gov](mailto:cryan@shelterislandtown.gov)  
631-749-0758



## Town of Shelter Island

### Water Quality Improvement Rebate

# REQUEST FOR PAYMENT FORM / REQUIREMENTS / CHECKLIST

## *The Final Stage of Process*

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### **Instructions for Applicant Request to Release Shelter Island Rebate Funds for Residential Advanced Septic Treatment Systems**

#### **Timing:**

Applicants request funding release after the system is fully installed, approved by Suffolk County Department of Health Services, and County and State grants have been received by the applicant.

#### **Requirements:**

In order to receive funds reserved in the Shelter Island Conditional Rebate Agreement the applicant must complete and submit these forms with supporting documentation to the WQI Advisory Board. Please fill in expenses or payments in all of the pale-yellow fields in the "Request for Payment and Calculation Form".

The current versions are on the WQI website (title "4 – Request for Payment and Calculation Form with Checklist").

A member of the WQIAB may contact you to clarify the type or size of expenses.

#### **Filing Instructions:**

One printed hard plus PDF of all documents listed below, including signed forms, must be delivered to Catherine Ryan, WQIAB Clerk.

Deliver in-person at 38 N. Ferry Road, Shelter Island, NY, or via USPS: P.O. Box 970, Shelter Island, NY 11964-0970 plus a PDF copy emailed to [cryan@shelterislandtown.gov](mailto:cryan@shelterislandtown.gov)

SCDH green stamp approval cover page must be in color.

## Town of Shelter Island Water Quality Improvement Rebate

### Required documentation checklist to be submitted with rebate release request.

- Copies of the Suffolk County Final Survey approval cover page (color copy of the green stamp cover page). The entire file is not required by the WQI. Exception - If this is a rebate for an emergency replacement please submit a copy of the "Design Notice" letter from the SCDHS Wastewater Management Department.
- Copies of vendor expense invoices, showing "paid in full".
- Completed and signed "Owners Certification of Application for Rebate Release and Access".
- Completed and signed "Request for Payment and Calculation Form".
- Copy of Suffolk County and NY State septic upgrade grant rebate check or check stub, or if denied by them a copy of the denial letter.
- Verification that the Shelter Island Well Registry has been filed (a copy of the Well Registry document initialed by the Building Department Clerk is adequate) \*
- Verification that the Shelter Island Septic Registry has been filed (a copy of the Septic Registry document initialed by the Building Department Clerk is adequate). \*
- A summary page listing all expenses that are requested for reimbursement.

\* Note: See the Building Departments Tab in the Town website for the current instructions for completing the Well and Septic Registry forms.

**Directions:** Complete the OWNERS CERTIFICATION OF APPLICATION FOR REBATE RELEASE AND ACCESS contract in ink, original to be forwarded with other documents to the WQI clerk.

**Water Quality Improvement Advisory Board IA System Grant Funding Program**

**OWNERS CERTIFICATION OF APPLICATION FOR REBATE RELEASE**

I/WE, (print full name(s),

Owner #1 \_\_\_\_\_

Owner #2 \_\_\_\_\_

the undersigned, certify that I/We are the legal titled owner(s) of the land identified in this application and that this application, including any appended documentation, constitutes a true statement of facts to the best of my/our knowledge.

Owner #1 signature \_\_\_\_\_ Date \_\_\_\_\_

Owner #2 signature \_\_\_\_\_ Date \_\_\_\_\_

**(Signing this form also authorizes the Town to access to the site to perform an inspection of the system)**

Property Address \_\_\_\_\_

Suffolk County Tax Map # \_\_\_\_\_

Phone \_\_\_\_\_

Email address \_\_\_\_\_

**Directions to complete the REQUEST FOR PAYMENT AND CALCULATION FORM:** Enter information in all of the pale-yellow fields. For expense types that are not being claimed place "none" in the "Vendor Name" field with zero as the expense. Sign and submit the form with the required documentation attached. Submit the original of the forms and xerox copies of other documents to the WQI clerk.

A member of the WQI may contact you to clarify the type or size of expenses.

## TOWN OF SHELTER ISLAND

38 N. Ferry Road, P.O. Box 970, Shelter Island, NY 11964-0970

### Request for Payment and Calculation Form

Date \_\_\_\_\_  
 Owner \_\_\_\_\_  
 Property Address \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 SCTM # \_\_\_\_\_  
 Phone \_\_\_\_\_ Email \_\_\_\_\_

**\* Complete fields with the invoice amount PAID and attached a copy of each invoice to the form. Please fill in costs for expenses or payments in all of the pale-yellow fields.**

Expenses Paid	Vendor Name	Cost	Office Use	WQI Notes
Engineering				
Installer				
Survey				
Water Test				
Backwash line				
Backwash water filter drywell				
Test Hole Boring				
New Well Upgrade				
Other				
Total expenses (submitted/WQI Approved)				
<b>Less: NYS Grant payment amount</b> (Include Copy of Check)				
<b>Less: SCOH grant payment amount</b> (Include Copy of Check)				
Expenses subject to SI Town Rebate (Submitted/WQI Approved)				Expenses minus grants
Conditional Rebate Funding Reserved by Town Board				
<b>Recommended Rebate to be forwarded for Town Board authorization.</b>				

**Property Owners Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**FOR OFFICE USE ONLY: WQIAB Approved on** \_\_\_\_\_ **Total Payment Approved \$** \_\_\_\_\_

WQIAB Chairperson (PrintName) \_\_\_\_\_  
 Signature \_\_\_\_\_ Date \_\_\_\_\_