This is a guide to assist in accurately and completely filling out OPPD Business Rebate Applications.

Table of Contents

First you must be an **OPPD Trade Ally** in order to submit applications. If you are not presently a Trade Ally and would like to become one please go to www.oppd.com/businessrebates to find out more.

The cells in the application that need completed are either **GREEN or BLUE**. GREEN are to be completed by you and BLUE are to be completed by the customer or by you if the customer provides you the information requested.

Section "A. Customer Information"

Each Business Rebate Application is the same for Lighting, ARC and Custom. There are minor additions for HVAC as shown below and underlined.

1. **Customer Company Name*:**	Name of Company you are doing business with
2. **Customer Contact Last Name*:**	Last Name of company contact
3. **First Name*:**	First Name of company contact
4. **Middle Initial:**	Middle Initial of company contact (not required)
5. **Customer Contact Telephone*:**	Phone number for person listed as contact

6. Ext:	Phone extension (if applicable)
7. Customer E-Mail*:	E-Mail address of contact who is listed
8. Project Physical Address*:	Where is the work taking place – Street Address
9. Project Physical Address 2:	If two line address
10. Project City*:	City where the project is taking place
11. Project State*:	NE is filled in for you
12. Project Zip*: (#####)	**Five digit** zip code for the address

New Construction*:

This is a pull down menu **and is only part of the HVAC Application**. Choose **"Yes" or "No".**

IMPORTANCE: if this application is for new construction, then the customer **will NOT have an OPPD account number;** selecting "Yes" will negate the required account number in box 13.

13. OPPD Account Number*:	**Only the OPPD customer** can provide you this information. They can find it on their OPPD bill or by calling OPPD and requesting it. **Only the customer** will *be given any billing information **from OPPD**.
14. Name on OPPD Account*:	(**Same** as #13) – This may be different than the *Customer Name* as many businesses have a DBA name.
15. Property Occupied By*:	**This is a pull down menu. The choices are "Owner" and "Tenant" (Selection required). If you are in doubt ask your customer.**
16. Trade Ally Business Name*:	Your company's name – please use consistent spelling and or abbreviations; IE: "Inc." vs "Incorporated" Inconsistency affects OPPD ability to track your success with the program.
17. Trade Ally Contact Last Name*:	Last name of the person at your company who OPPD should be contacting with questions, pre-approval, or rebate check information.
18. First Name*:	First name of the person at your company who OPPD should be contacting with questions, pre-approval, or rebate check information.
19. Middle Initial:	Middle Initial of the contact from your company (not required)
20. Trade Ally Contact Phone Number*:	Phone number of person listed as Trade Ally Contact

21. Ext:	Phone extension if applicable
22. Trade Ally E-Mail*:	E-Mail address of contact who is listed
23. Trade Ally Street Address*:	Your company location = Street Address
24. Trade Ally Physical Address 2:	Two line address, as needed
25. Trade Ally City*:	City Nambe
26. Trade Ally State*:	State (Select from drop-down)
27. Trade Ally Zip*:	**Five digit** Zip Code

Section "B. Project Information"

Different for each type of Rebate Application.

For "Lighting Rebate Application"

1. **Annual Hours of Operation*:**

   Discuss the annual operating hours with your customer and record it here. This number will auto fill to the column "Annual Hours of Operation"; however, this number can be overridden within each cell of that column as needed to provide accuracy. An example would be if the annual operating hours of an industrial plant was "8,760"; however the office area worked forty hours a week. The lighting retrofits associated with the office area would be changed by the Trade Ally to show "2,080". The vast majority of time you will not need to adjust the numbers that are auto-filled (that is why the column is not green).

2. **Cost per kWh*:**
   You will need to ask your customer for this information, and you may need to assist them in the calculation of this figure. They may also show you their bill in order for you to help. ***OPPD cannot provide this information to anyone but the customer.*** Figures are determined by looking at the customer's most recent OPPD bill.
   > Divide the total amount due (including taxes, ext.) by the number of kWh listed on the bill = *Cost per KWH*.

Part 1 – Prescriptive Lighting:

This is for lighting that is being replace or retrofit with predetermined lighting configurations as shown on the second tab of the **Lighting Rebate Application**. This tab is named "Lighting Configurations" it is also called the "Rebate Reference Sheet" on the program web page.

1. **Current System Tracking #*:**
   This is a pull down menu that references the *Existing System Tracking Number* shown in column "B" of the second tab of the application "Lighting Configurations". Once you select from the pull down menu the **"Type of Fixture"** will autofill.

2. **Current # of Fixtures*:**

This is the number of fixtures that you will be replacing/retrofitting that coincide with the tracking number that was entered. If this is "lamp change out only" then show the total number of lamps.

> **NOTE: Use the pull down menu to identify each listed retrofit that you are installing (if there are lights that you are replacing that are not listed they will be addressed in the custom section of the application).**

3. **Proposed System Tracking #*:**
   This is a pull down menu that references the *Retrofit System Tracking Number* shown in column "B" of the second tab of the application "Lighting Configurations". Once you select from the pull down menu the **"Type of Fixture"** will autofill.

4. **Proposed #of Fixtures*:**
   This is the number of retrofit/replacement fixtures that you will be installing and coincides with the tracking number that was entered. If this is "lamp change out only" then show the total number of lamps.

> **NOTE:** The first line of the "Current System" must coincide with what is being installed and is shown on the first line of the "Proposed System". First Line "Current" = First Line of "Proposed", Second Line of "Current" = Second Line of "Proposed", and so on.

Part 2 – Custom Lighting:

This section is for lighting that is being replace or retrofit with items that **are not shown** on the "Lighting Configurations" list.

Current System:

5. **Type of Fixture*:**
   Fill in the type of fixture or lamp that is being replaced or retrofit. This section is free form. An example would be: "4X4 T12 fixture". The first line of the Custom Section needs to coincide with the first line of the Proposed System.

6. **Current # of Fixtures*:**
   This is the number of fixtures that you will be replacing/retrofitting. If this is "lamp change out only" then show the total number of lamps.

7. **System Watts per Fixture*:**
   Show the number of watts per fixture of the existing system that will be replaced or retrofit. If this is "lamps only" then use the watts per lamp.

Proposed System:

8. **Type of Fixture*:**
   Fill in the type of fixture or lamp that is being replaced or retrofit. This section is free form and should match the cut sheet which is required for each fixture listed in the custom section.

9. **Proposed # of Fixtures*:**

This is the number of fixtures that you will be replacing/retrofitting. If this is "lamp change out only" then show the total number of lamps.

10. **System Watts per Fixture*:**
Show the number of watts per fixture of the retrofit/ replacement. If this is "lamps only" then use the watts per lamp.

11. **LED Fixture*:**
This is a pull down menu select "Yes" or "No" to indicate whether or not LED fixture applies.

12. **Project Cost Without Rebate*:**
This is the total amount that you have quoted the customer for the project. This number should include all material, labor and taxes (if this amount varies slightly from the final invoice, OPPD will make the adjustment and you do not need to be concerned with making the change).

NOTE:
Cut Sheets **showing system or lamp wattage are required for all LED lamps.**
Cut Sheets **are required for all retrofit/replacement fixtures and lamps listed in the** *Custom Section*. **All Lighting retrofits and replacements must comply with the Terms and Conditions and Project Requirements shown in** *Sections C and D*.

For "HVAC Rebate Application"

1. **Cost per kWh*:**
You will need to ask your customer for this information, and you may need to assist them in the calculation of this figure. They may also show you their bill in order for you to help. ***OPPD cannot provide this information to anyone but the customer.*** Figures are determined by looking at the customer's most recent OPPD bill.
> Divide the total amount due (including taxes, ext.) by the number of kWh listed on the bill = *Cost per KWH*.

This number will be used to show the savings associated with buying the higher efficiency cooling equipment. The savings is shown automatically in the ***"Energy Savings"*** box.

2. **Heat Pump*: New Construction or Conversion**
This is a pull down menu. Select "Yes" or "No" as appropriate for the project (New or Conversion). This is important because *all new construction or conversion Heat Pumps* qualify for a $50 per ton rebate *in additio*n to any other rebate amount.

3. **Type of HVAC*:**
This is a pull down menu that references the "HVAC Configuration" types shown in column "C" of the second tab of the application labeled "HVAC Configurations".

4. **EER or kW/ton (chillers only) *:**
This is a pull down menu that references EER or kW/ton on shown in columns "F" and "G" of the "HVAC Configurations" list.

5. **Manufacturer Model Number*:**
This is a free form field; list manufacturer and model number.

6. **AHRI Sheet*:**

This is a pull down menu. Answer "yes" and remember to include the appropriate AHRI sheets for each piece of equipment to the application submission. The manufacturer and model number on the AHRI sheet must match what is listed in the "Manufacturer Model Number" column.

7. **Unit Size (Tons) *:**
This is a free form box. You may use even numbers or go out one decimal place.

8. **Number of Unit*:**
This is the number of units that you will be installing for that manufacturer model number and tonnage.

9. **Project Cost Without Rebate*:**
This is the total amount that you have quoted the customer for the project. This number should include all material, labor and taxes (if this amount varies slightly from the final invoice, OPPD will make the adjustment and you do not need to be concerned with making the change).

For "ARC Rebate Application"

1. **Cost per kWh*:** You will need to ask your customer for the following calculation, and you may need to assist them in the calculation of these figure. They may also show you their bill in order for you to help. ***OPPD cannot provide this information to anyone but the customer.*** Figures are determined by looking at the customer's *most recent* OPPD bill.

   Divide the total amount due (including taxes, ext.) by the number of kWh listed on the bill. This number will be used to show the savings associated with buying the higher efficiency cooling equipment. The savings is shown automatically in the "Energy Savings" box.

1. **Tonnage and Manufacturer Model Number*:**
This is a pull down menu that references the "ARC" types and tonnages shown in column "B" of the second tab of the application labeled "Configurations".

2. **Number of ARC*s:**
This is the number of units that you will be installing for that manufacturer model number and tonnage.

3. **Project Cost Without Rebate*:**
This is the total amount that you have quoted the customer for the project. This number should include all material, labor and taxes (if this amount varies slightly from the final invoice, OPPD will make the adjustment and you do not need to be concerned with making the change).

For "Custom Rebate Application"

1. **Type of Facility*:**
This is a pull down menu, select the most appropriate type of facility from the list.

2. **Year Constructed*:**
This is a free form field. Enter a four digit year of the original construction. Do not be concerned with additions or renovations.

3. **Building Square Footage*:**
   This is a free form field. Enter the entire square footage of the building where the custom project is taking place.
4. **Type of Custom Application*:**
   This is a pull down menu. Select the most appropriate description for each item included in the project.

5. **Life of Measure*:**
   This is a free form field. List the expected life energy savings life of each measure.
   > **NOTE:** If a measure is deemed by OPPD to not be sustainable for at least 5 years the measure cannot qualify for a rebate.
6. **Description:**
   This is a free form field, available if a more in-depth description is needed. (NOT required)

7. **Estimated savings report submittal date*:**
   Custom projects often require long implementation, measurement, and verification periods which affect completion dates. *Estimating as accurately as possible* (to the calendar year) helps with budgeting and asset allocation, especially with rebate amounts expected to exceed $100,000.
8. **Projected Total Energy Savings (%)*:**
   Estimated total energy savings within the building; based on your engineering calculations.
9. **Project Peak Demand Reduction (kW) *:**
   Estimated kW of peak demand expected to be lower due to the project.
10. **Projected Energy Savings*:**
    Show the annual savings you are projecting for each of the following applicable energy types.
    > **Electricity (kWh/yr.):**
    > **Natural Gas (terms/yr.):**
    > **District Chilled Water (ton-HR/yr.):**
    > **District Steam/Hot Water (lbs-steam/yr.):**
11. **Estimated Annual Savings ($)*:**
    Estimated annual financial savings expected as the result of the project.
12. **M&V Method*:**
    This is a pull down menu showing the three acceptable M&V types for custom projects. See M&V types shown in *Section "D" Project Requirements*.
13. **Pre-Project Baseline Information**
    > **Baseline Period*:** Enter start date of the baseline period (MM/DD/YYYY)
    > Enter end date of the baseline period (MM/DD/YYYY)
    > **Peak kW During Baseline*:** Enter the peak demand during the baseline period
14. **Project Implementation Budget without Rebate*:**
    This is the *total amount* that you have quoted the customer for the project, and should include all material, labor and taxes.
    NOTE: There may be changes to orders etc. with large projects so this is considered a budget number. The final invoice at project completion will be the final consideration.
15. **Energy Study Cost*:**

Show the total amount the customer paid for the Energy Study if one was required for the project. We will reconcile this number with the invoice that is also required for payment.

Section "C. Terms and Conditions" of each Business Rebate Application is nearly the same.

As a Trade Ally you are responsible for reading and knowing the program Terms and Conditions.

There are two BLUE boxes at the bottom of this section that need to be initialed by the customer or OPPD will NOT be able to process the application.

Section "D. Project Requirement" of each Business Rebate Application are different.

It is very important that you *read and recall the project requirements* in order to accurately guide your customers on the program. ***The program "quiz" will also reference many of the Project Requirements to ensure you are comfortable with the requirements associated with each of our Business Rebates.***

Section "E. Payment Information"

Each Business Rebate Application is the same.

1. **Make check payable to*:**
   Name of the person or entity who will receive the rebate check.
2. **Attention:**
   Name of identified contact person, as needed (NOT required).
3. **Mailing Address*:**
   Address to which the check will be mailed.
4. **Mailing Address 2:**
   As needed
5. **City*:**
   City of Mailing Address.
6. **State*:**
   Auto Filled with Nebraska (pull down menu where any state may be selected).
7. **Zip*:**
   Five digit zip code of Mailing Address

Section "F. Authorization"

Each Business Rebate Application is the same.

***Required: FIRST - Read and Agree** to the Authorization statement;*

Then the following are needed:

1. **Customer Authorized E-Mail Address*:**
   Email address of the Customer making the authorization.
2. **Date*:**
   Customer Authorization Date (date of issue)
3. **Trade Ally Authorized E-Mail Address*:**
   Email address of the Trade Ally making the authorization.
4. **Date*:**
   Trade Ally Authorization Date (date of issue)

To expedite processing applications OPPD allows the E-mail addresses shown as authorization, in lieu of a signature. The Application and applicable documentation *must also be sent to the customer contact (in the CC: line)* **at the time it is submitted via email to OPPD**. This is to ensure that the customer has documentation of their authorization and of the "Payment Information".

Applications received without the customer shown on the CC: line of the email submission of the application CANNOT be processed.