Business Rebates

TRADE ALLY TRAINING MANUAL
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Account Access
How to Claim Your Account
1. Begin the process of claiming your company’s Trade Ally account by clicking the link below:
   OR
   www.oppd.com/tradeallycentral then click on My Portal Login

3. Then click on CREATE ACCOUNT at the bottom of the page.

4. Complete the information using the name and email address on your present Trade Ally Account.
   NOTE: You must be an active trade ally set up in our system for this step to work properly.

5. Select a password, enter and re-enter.

6. Click on Submit
7. The following screen will appear.

8. Re-Enter the email address and the password you created and click **ACCOUNT LOGIN**.
   If your account Dashboard appears (A. Below), you are ready to submit and review applications.
   If you receive a denied message (B. below), your information has not been set within our system up by OPPD. **NOTE: See B. for further instructions if this occurs**
   A. Dashboard
B. Declined Message

If you received the declined message, you may now choose:

A. Do I want to have my own Trade Ally Account as a sub account of my company?
OR
B. Do I want the one point of contact who has already been established by OPPD to enter all applications?

If you choose A, click on “Contact Us” and email us with your request to be added as a Trade Ally under the umbrella of your company (pending a signed Trade Ally agreement is on file from your company and you have attended annual training). If this criteria has been met OPPD will add you to the system, email you once you have been added and then you will be able to go in with the password you created and submit applications.

Included in your email you will need the following information:

Your first and last name, your email address, your company’s name and address

If you choose B, you do not need to do anything. When you want to submit an application do so though the established contact for your company. They will have access to the Dashboard and be able to track your projects. They will also receive all email correspondence regarding the projects.
Prescriptive Program Overview

Log-In

1. Go to www.OPPD.com/tradeallycentral and click on the Prescriptive Application. The screen below will appear. Click the orange **Begin Application** box to start the process.

2. Enter your **email address** and **password** or create new account.
Application Pre-Approval Process

Project Information

3. Enter the customer validation information below for rebate which is the street address EXACTLY as it is shown on the OPPD bill, (see screen shot on the top of the next page).
   Put the street number (only), in the first box and the street name (only) in the second box.
   NOTE: Putting the street number and street address in one box will not return results.

4. Click Continue

5. Select the address where the project is taking place by clicking the green plus sign.
   NOTE: There may be multiple addresses if there are bays or multiple meters on one bill. You must click directly on the green plus sign.
6. Clicking the green box begins the application process and the following pop up will appear.

7. Click OK

8. Enter a unique Project Name. This will help track projects where there may be more than one application or for customers with multiple projects. Including specific area information and/or phase as applicable. (Ex. ABC Company - Conference Room Ph.2)

9. Click Continue
5. **Enter the customer contact information** on the following screen. Some information will automatically fill in based on the account information. You will also need to add information to this section.

   a. **First Name** enter the first name of the customer contact for the project.
   
   b. **Last Name** enter the last name of the customer contact for the project.
   
   c. **Phone Number** will auto fill with the phone number on the OPPD account. Update the number if necessary to reflect the **contact number of the primary contact** for the project.
   
   d. Enter the **email address** of the customer contact for the project. *(NOTE: This is the email where all status emails will be sent.)*
   
   e. If you will be doing more than one project with this customer you may save their information by checking the “Yes, save this as a new contact in my profile contact list” box. Then, next time you do business with them you can enter their information by accessing it through the pull down menu at the top of the section where is says “Select existing contact”.
   
   **NOTE:** Do not click on Clear Contact or all information will need to be re-entered.

---

**Application Information**

* Indicates required field

Customer Contact Information and Project Physical Address

---

First Name:  *(First & Last or Company)*

- First Name

Last Name:  *(First & Last or Company)*

- Last Name

Company:  *(First & Last or Company)*

- THE GAVILON GROUP LLC

Address:  *(Address)*

- 1333 CAPITOL AVE

Address (cont.):  *(Address continued)*

City:  *(City)*

- OMAHA

State/Province:  *(State/Province)*

- NEBRASKA

Postal Code:  *(Postal Code)*

- 68105-3113

Phone:  *(Phone)*

- 402-689-4163

*Email:  *(Email Address)*

---

Save contact for later use in your contact list?

✓ Yes, save this as a new contact in my profile contact list

---

CLEAR CONTACT
10. The Payee Contact Information will populate based on the account information in the lines below. The Payee Information MUST reflect who will be receiving the check. Make sure to adjust this information as necessary.
   a. The First Name” and Last Name boxes will be blank. They should be filled in ONLY if the check is going to an individual person. If the check is going to a company, leave these blank.
   b. **Company** will auto fill from the OPPD account. If the check is to go to a Trade Ally or another Company *this must be updated to reflect that information*
   c. Enter the **Tax ID** as shown on the W-9 form
   d. If there is a C/O name, enter it in the **Address** field. Then enter the mailing address in the **Address (cont.)** field (See example below)
   e. If there is no C/O, the address should remain in the **Address** field (*NOTE: This must reflect the address where the check is going to be sent*)
   f. If you will be doing more than one project with this customer you may save their information by checking the “Yes, save this as a new contact in my profile contact list” box. Then, next time you do business with them you can enter their information by accessing it through the pull down menu at the top of the section where is says “Select existing contact”.
   *NOTE: Do not click on Clear Contact or all information will need to be re-entered.*

11. Scroll down to the Trade Ally Information section
12. Click on the **CLICK HERE TO SEARCH FOR A CONTRACTOR**
13. A new screen will open with Trade Ally information. Scroll through the list or enter your company name in the 'Company' box to find your information. **NOTE: You must use your company’s name as it is registered in the system.**
   a. Click the **green plus sign** to the left to select your company. Your company’s information will populate in the box below
   
   ![Trade Ally Information](image)

   b. Click **continue**
14. Answer the **Project Information** questions
   a. **Property Occupied By** select the applicable option, owner or tenant.
   b. Enter the **Year of the W-9** that you received from the person or entity who is receiving the rebate check. *The W-9 needs to be the most recent version issued.*
   c. **Project Type** is a pull down menu. Select: Lighting, HVAC or ARC.
   d. **Building Type** is a pull down menu. Select the type that most accurately represents the building.
   e. **Project Cost with Rebate** – enter the total amount expected for the equipment and labor for the entire job.
   f. Click **Continue**

15. **Terms and Conditions**
   a. **Review the terms and conditions***
      *NOTE: See *Terms & Conditions section for specifics, reference the Table of Contents.*
   b. **Check each box if you agree**
   c. Click **Continue**.
Lighting Equipment Entry & Documentation

*NOTE: For HVAC & ARC Equipment entry see program specific sections, reference the Table of Contents.

16. **Equipment Entry – Prescriptive Lighting**
   a. Click on the **green plus sign** to start adding equipment
   b. The “Add Equipment” box will appear

   ![Equipment Entry Image](image)

   c. “Choose Your Equipment” by clicking on the category based upon **Project Type** selected earlier in the application. *(Example below shows Prescriptive Lighting equipment entry)*

   ![Add Equipment Image](image)

   d. A second box will appear for you to select the specific type of lighting. **NOTE:** All prescriptive rebates are under **General Lighting**, custom lighting fixtures under **Custom Lighting** and lighting controls under **Controls**.

   *If your project includes Custom or Controls see specific instructions in section #17 and #18 below.*

   ![Select Equipment Image](image)
e. Click the **green plus sign** next to the **new equipment type** you will be adding (LED exit sign, LED lamp, LED light strip (per strip), LED retrofit kit or new LED fixture). **If your project includes Custom Lighting see specific instructions in section #17 below.**

f. **Quantity:** Enter the **NEW** quantity of fixtures

g. **Existing Fixture:** select the OLD/existing fixture or bulb that is being replaced

h. **KWH Rate:** will be auto-filled but can be adjusted if necessary

i. **Click Submit**

   *If additional equipment needs to be entered repeat steps e. – i. until all equipment has been entered.*

17. **Equipment Entry - Custom Lighting**

   a. Select **Custom Lighting** from the Equipment menu.

   b. [Diagram of Equipment Entry - Custom Lighting]

   c. [Form for entering equipment details]
c. Click the **green plus sign** next to the CUSTOM LIGHTING – OTHER

d. Quantity: Enter the **NEW** quantity of Fixtures

e. New Fixture: Select the new fixture type that best represents what is being installed

f. Existing Fixture: Select the existing fixture type that best represents what is being replaced

g. KWH Rate: will be auto-filled but can be adjusted if necessary

h. Existing # of Fixtures: Enter the number of **EXISTING** fixtures.

i. Existing System Watts Per Fixture: Enter the wattage of the lamp or fixture that is being replaced

j. New System Watts Per Fixture: Enter the wattage of the fixture or lamp as shown on the cut sheet

k. Click **Submit**

*If there is more than one custom upgrade then repeat steps a. – h. until all equipment has been entered.*

18. **Equipment Entry – Controls**

a. Select **Controls** from the Equipment menu.
b. Click the **green plus sign** next to the **new equipment** type you will be installing (Daylight Harvesting Ballast, Embedded Fixture Controls, Occupancy Sensor).

c. **Add the Quantity**

d. **Click Submit**

*If there is more than one custom upgrade then repeat steps a. – h. until all equipment has been entered.*

19. After all the equipment for your project has been entered click **Continue** on the Equipment Entry screen.
20. **Required Supporting Documentation** –

   a. Upload required documents by clicking on the *green plus sign* in each box.  
      *NOTE: The W-9 uploaded must reflect the **Payee information** previously entered within the application and must be the latest version published. (Ex. Rev 2018)*

   ![Required Supporting Documentation Diagram]

   b. Click **Browse**

   c. Select documents and click Open  
      *NOTE: The system only allows one file within each ‘Document Upload’. If you have multiple cut sheets to upload see special instructions below.*

   d. Click **Upload File**

   ![File Upload Diagram]

   e. The Documents will turn green once uploaded

   f. Repeat this step for each required document

   g. Click **Continue**

   ![All Items Have Been Completed Diagram]
*Special Instructions for uploading multiple documents:

1. Open a blank document in Microsoft Word
2. Go to your File Explorer to find your documents saved on your computer (Note: You must save Cut Sheets to your computer prior to this step)
3. Select applicable documents by holding down the **Shift Key** and **left-clicking** on each document

4. Using your mouse, **drag and drop selected documents to the blank Word Document**

5. **File & Save As** (**this is the document you will upload in the cut sheets document box**)
Complete Application

21. **Potential Payment** – Review the Rebate amount, along with other measures based upon the information entered in the application.

### Potential Payment

<table>
<thead>
<tr>
<th>Measure</th>
<th>Quantity</th>
<th>Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>New LED Fixture</td>
<td>15</td>
<td>75.00</td>
</tr>
<tr>
<td><strong>Total Incentive</strong></td>
<td></td>
<td><strong>$75.00</strong></td>
</tr>
</tbody>
</table>

### Lighting Project Information Without Rebates

- **Project Cost Without Rebates**: $2,013.00
- **Simple Payback Period (years) Without Rebate**: 42.7
- **Return On Investment Without Rebate**: 2.3%

### Lighting Project Information With Rebates

- **Project Cost With Rebates**: $1,542.00
- **Simple Payback Period (years) With Rebate**: 41.1
- **Return On Investment With Rebate**: 2.4%

### Lighting Project Information

<table>
<thead>
<tr>
<th>Total Var Difference</th>
<th>Total Annual With Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2</td>
<td>$43</td>
</tr>
<tr>
<td>Annual CO2 Impact ($s)</td>
<td>Total Rebate</td>
</tr>
<tr>
<td>$15</td>
<td>$75.00</td>
</tr>
</tbody>
</table>

a. Click **Continue**
b. Click **Complete Application** and your application will automatically be sent to OPPD for **Preapproval**. Upon preapproval, the Trade Ally email address on file and the customer email address provided will receive an email notification and funds will be set aside. **NOTE**: Project complete and invoice submittal must occur within 120 days of preapproval to ensure rebate funding.

### Final Step!

Please click “Complete Application” button to submit your rebate application.

Applications can take up to 8 weeks to process. You will be notified by email of application status changes.
**Project Completion Process**

**Upload Invoice**

**Next Steps: Uploading the invoice once the project is complete**

1. Log back in and find the project under the **New Tasks** Section of your dashboard
   
   a. Click on the specific project, and it automatically takes you to the **Current Task**
   b. Click within the box **Document Upload: Upload Invoice**
   
   *NOTE: The system only allows one file within each ‘Document Upload’. If you have multiple invoices, either merge them all into one document or see special instructions on page 17 on how to Upload Multiple Documents.*

   c. Click **Browse**, select your document
   d. Click **Upload File**

2. If there have been any changes to the project (Ex. additional fixtures) click on the **Send Us A Message** box and input your changes.
3. Once you have successfully submitted all required documentation, OPPD will review and approve as applicable.

NOTE: Rebate payments will be limited to 50% of the invoiced material/equipment cost of the project as shown on the invoice submitted.
HVAC Equipment Entry & Documentation

1. **Equipment Entry for HVAC**
   a. Click on the **green plus sign** to start adding equipment
   b. The “Add Equipment” box will appear
   c. “Choose Your Equipment” by clicking on the category based upon **Project Type** selected earlier in the application
   d. A second box will appear. Select the appropriate **equipment category** for your project
e. Click the green plus sign next to the new equipment type you will be adding within the appropriate category. NOTE: Equipment listed will vary based on your previous selection.

f. Enter equipment details – based upon equipment specifications. 
   NOTE: Equipment details will vary based on previous selections.

g. Click Submit

   If there is additional equipment within the project, repeat steps a. – f. until all equipment has been entered.
2. After all equipment for the project has been entered click **Continue**

3. **Upload Required Supporting Documentation**
   a. Clicking on the **green plus sign** in each box.
   
   **NOTE:** The W-9 uploaded must reflect the **Payee information** previously entered within the application and must be the latest version published. (Ex. Rev 2018)

   b. Click **Browse**
   c. Select documents and click **Open**
   d. Click **Upload File**

   e. The documents box will turn green once uploaded
f. Repeat this step for each required document

NOTE: The system only allows one file within each ‘Document Upload’. If you have multiple AHRI Certificates see special instructions on page 17.

g. Click Continue

4. Review Potential Payment – Review the rebate amount, along with all other measures based upon information entered in the application.

   a. Click Continue
   c. Click Complete Application and your application will automatically be sent to OPPD for Preapproval. Upon preapproval, the Trade Ally email address on file and the customer email address provided will receive an email notification and funds will be set aside.

   NOTE: Project complete and invoice submittal must occur within 120 days of preapproval to ensure rebate funding. Reference the Project Completion Process on page 20, once you project is completed for next steps.
1. **Equipment Entry for the Advanced Rooftop Unit Controller (ARC) Program**
   a. Click on the **green plus sign** to start adding equipment
   b. The “Add Equipment” box will appear
   c. “Choose Your Equipment” by clicking on the category based upon **Project Type** selected earlier in the application
   d. A second box will appear for ARC. Make your selection again (in this case “ARC”).
   e. Click the **green plus sign** next to the **new equipment** type you will be adding.
f. **Quantity**: Enter the number of ARCs associated with the tonnage of the existing RTU that you enter in “TONNAGE OF EXISTING RTU”. *NOTE: Rebates are based on the tonnage of the RTU so this step will need to be repeated based on the different sizes of RTU’s within the project*

g. **Tonnage of Existing RTU**: Enter the size (in tons) of RTU(s) associated with the ARC quantity entered. Note: If tonnage is not listed round down to the nearest listed tonnage.

h. **KWH Rate**: will be auto-filled but can be adjusted if necessary

i. **Click Submit**

*If additional equipment needs to be entered repeat steps a. – i. until all equipment has been entered.*

2. After all the equipment information for the project has been entered click **Continue**
3. Upload Required Supporting Documentation
   a. Clicking on the **green plus sign** in each box. The **Cut Sheet** is a copy of the manufacturers spec sheet.
      
      **NOTE:** The W-9 uploaded must reflect the **Payee information** previously entered within the application.
   b. Select **Browse**, find your document and click Open
   c. Click **Upload File**

   ![File Upload](image)

   d. Once uploaded, the documents box will turn green
   e. Click **Continue**

4. Review Potential Payment – Review the rebate amount, along with all other measures based upon information entered in the application.
a. Click Continue
d. Click Complete Application and your application will automatically be sent to OPPD for Preapproval. Upon preapproval, the Trade Ally email address on file and the customer email address provided will receive an email notification and funds will be set aside. NOTE: Project completion and invoice submittal must occur within 120 days of preapproval to ensure rebate funding.

Reference the Project Completion Process on page 20, once you project is completed for next steps.
Custom Program Overview

Log-In

1. Go to www.OPPD.com/tradeallyportal and click on the Custom Application button. The screen below will appear. Click the orange Begin Application box to start the process.

2. Enter email address and password or create new account.
Application Pre-Approval Process

Project Information

3. Enter the customer validation information below for rebate which is the street address EXACTLY as it is shown on the OPPD bill. Put only the street number in the first box and the only the street name in the second box. NOTE: Putting the street number and street address in one box will not return results

4. Click continue

5. Select the address where the project is taking place by clicking the green plus sign. NOTE: There may be multiple addresses if there are bays or multiple meters on one bill. Be sure to select the correct location.
6. Clicking the green box begins the application process and the following pop up will appear.
7. Click OK

![Message from webpage]

8. Enter a **unique Project Name**. This will help track projects with multiple phases or projects with the same customer. (Ex. ABC Company - Conference Room Ph.1)
9. Click **continue**

![Project Name]

10. **Enter the customer contact information** on the following screen. Some information will automatically fill in based on the account information. You will also need to add information to this section.
   a. **First Name** of the customer contact for the project.
   b. **Last Name** of the customer contact for the project.
   c. **Phone Number** will auto fill with the phone number on the OPPD account. Update the number if necessary to reflect the contact number of the primary contact for the project.
   d. Enter the **email address** of the customer contact for the project. *(NOTE: This is the email where all status emails will be sent.)*
   e. If you will be doing more than one project with this customer you may save their information by checking the “Yes, save this as a new contact in my profile contact list” box. Then, next time you do business with them you can enter their information by accessing it through the pull down menu at the top of the section where is says “Select existing contact”.

   *NOTE: Do not click on Clear Contact or all information will need to be re-entered.*
11. Scroll down to the Payee Contact Information

12. The Payee Information MUST reflect who will be receiving the rebate check. Some of this information will populate based on the account information in the lines below. Make sure to update this information as necessary.

   g. The First Name and Last Name boxes will be blank. They should be filled in ONLY in if the check is going to an individual person. **If the check is going to a company, leave these blank.**

   h. Company will auto fill from the OPPD account. If the check is to go to a Trade Ally or another Company **this must be updated to reflect that information**

   i. Enter the **Tax ID** as shown on the W-9 form.

   j. If there is a C/O name, enter it in the **Address** field. Then enter the mailing address in the **Address (cont.)** field (See example below)

   k. If there is no C/O, the address should remain in the **Address** field **(NOTE: This must reflect the address where the check is going to be sent.)**

   l. **If you will be doing more than one project with this customer you may save their information by checking the “Yes, save this as a new contact in my profile contact list” box. Then, next time you do business with them you can enter their information by accessing it through the pull down menu at the top of the section where is says “Select existing contact”**.

**NOTE: Do not click on Clear Contact or all information will need to be re-entered.**
13. Scroll down to the Trade Ally Information section
14. Click on the ‘Click here for a Contractor’

15. A new window will open with a list of current Trade Allies. Scroll through the list or enter your company name in the ‘Company’ box to find and select your information. NOTE: You must use your company’s name as it is registered in the system.
   a. Click the green plus sign to select your company. Your company’s information will populate in the box below.
b. Click continue

16. Review **Terms and Conditions** and check the box if you agree.

*NOTE: See Terms & Conditions section for specifics, reference Table of Contents*

17. Answer the **Project Information questions**

   a. **Type of Facility** select the appropriate building type
   b. **Property Occupied By** select the related option, owner or tenant.
   c. Enter the **Year of the W-9** that you received from the person or entity who is receiving the rebate check. *The W-9 needs to be the most recent version issued.*
   d. **Tax ID** enter the number on the W-9
   e. **Year Constructed** enter the year the building was constructed
   f. **Building Square Footage** enter the square footage
   g. **PE First and Last Name or LC Professional** who is overseeing the verification of the project
   h. Click **Continue**
18. Scroll down
19. Answer the **Savings/Cost Information** questions
   a. **Estimated Annual Savings**: enter the estimated annual savings of the project
   b. **Estimated Savings Report Submittal Date**: enter the date the Savings Report is expected to be submitted
   c. **Energy Study Cost**: enter the amount of the Energy Study costs as applicable
   d. **Project Cost with Rebate**: enter the total amount expected for the equipment and labor for the entire job.

20. Click **continue**

**Equipment Entry**

21. **Equipment Entry**: You will see a line for **ENERGY STUDY**. This was automatically added to the application based upon 50% of the dollar amount previously entered in the Energy Study Cost field. If you are not submitting a rebate for an Energy Study Rebate, click the red ‘X’ to remove the line item.

   **NOTE**: The Energy Study Rebate amount will be up to 50% of the cost of the Energy Study with a not to exceed amount of $10,000.
a. Click on the **green plus sign** to start the process

![Equipment Entry](image)

**NEW PROJECT: ADD EQUIPMENT ITEMS**

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Name</th>
<th>Quantity</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>NON-INSTALLED</td>
<td>ENERGY STUDY</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

b. Choose equipment by clicking the **Custom button**

![Add Equipment](image)

Choose Your Equipment:
- Select your equipment through the following categories:
  - Custom
  - Other

![Commercial Custom button](image)

c. Click on the **Commercial Custom button**

![Add Equipment](image)

Please select from the following list of measures:

<table>
<thead>
<tr>
<th>Name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTHER</td>
<td></td>
</tr>
</tbody>
</table>

![Page 1](image)

Please select from the following list of measures:

<table>
<thead>
<tr>
<th>Name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTHER</td>
<td></td>
</tr>
</tbody>
</table>

![Page 1](image)

d. Click on the **green plus sign** next to **OTHER** then enter the required information,

![Add Equipment](image)

Please select from the following list of measures:

<table>
<thead>
<tr>
<th>Name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTHER</td>
<td></td>
</tr>
</tbody>
</table>

![Page 1](image)

e. **Quantity**: auto-filled to 1, do not change this

f. **Type of Custom Project**: select project type from the pull down menu

g. **Description**: provide a detailed description of your project
h. **Life of Measure:** Enter the length of time, in years, that the energy savings from the project will be in effect.

i. **Projected Total Energy Savings (%):** total percentage of projected energy savings each year as a result of the project measured

j. **Projected Peak Demand Reduction:** The peak demand that is projected to be reduced as a result of the project and measured/qualified in kW. *NOTE: The peak for the purposes of the program is determined in a number of ways however if the OPPD bill is the M&V method selected the peak will be determined by taking the peak billed kW for the months of June, July, Aug, and Sept prior to the project and averaged minus the peak billed kW for the months of June, July, Aug, and Sept post project completion and averaged*

k. **Electricity (KWH/YR):** The total energy projected to be saved each year as a result of the project measured/qualified in kWh

l. **M&V Method:** Use the menu to select which approved measurement and verification method you will be using to verify the demand reduction resulting from the project.
   1. Utility Bill Comparison
   2. System Submeter
   3. Individual Submeter

m. **Baseline Period Start Date (MM/DD/YYYY):** Enter the date and year the baseline measurement began

n. **Baseline Period End Date (MM/DD/YYYY):** Enter the date and year the measurement baseline ended

o. **Peak KW During Baseline:** Enter the peak kW from the baseline measurement period (between the start and end date listed above)
22. Add additional equipment if needed, by clicking on the green plus sign and repeat steps a. – o.

23. Click continue
Upload Supporting Documentation

24. Now upload all required the documents
   a. You will need the **Energy Study Report, Customer Commitment Letter, Energy Study Invoice (if applicable), and a W-9**
      **NOTE: The W-9 must match the Payee information previously entered.**
   b. Click on the **green plus sign** to start the upload process
   c. Click **Browse**, select your document
   d. Click **Upload File**
   e. Once successfully uploaded the document upload box will turn green
   f. Repeat steps b. – d. until all required documents have been uploaded

Click **Continue** once all document boxes have turned green
Complete Application

25. The following information will display based on the information entered within the application. Review to ensure accuracy.

26. Click continue

<table>
<thead>
<tr>
<th>Project Estimated Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peak Demand Reduction (kW)</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>Electricity (kWh/yr)</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>Natural gas (therms/yr)</td>
</tr>
<tr>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Cost Without Rebates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Implementation Budget Without Rebate ($)</td>
</tr>
<tr>
<td>$10,000.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Cost With Rebates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Cost with Rebate ($)</td>
</tr>
<tr>
<td>$8,000.00</td>
</tr>
<tr>
<td>Simple Payback Period (years) With Rebate</td>
</tr>
<tr>
<td>8.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Energy Study Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Study Cost ($)</td>
</tr>
<tr>
<td>$1000.00</td>
</tr>
</tbody>
</table>

27. The **Potential Rebate** amount will display

28. Click Continue
29. To submit your application, click **Complete Application**

30. Your application will automatically be sent to OPPD for **preapproval**. Once the project has been reviewed and pre-approved, the Trade Ally email address on file and the customer email address provided will receive an email notification. 

   **NOTE:** After preapproval, all required documents must be submitted to OPPD by the ‘**Estimated Savings Report Submittal Date**’ previously entered on the application to ensure funding is available.
Project Completion Process
Upload Required Documentation

Next Steps: Uploading post project Documentation

1. Next step is to upload the required documents once the project has been completed
2. Required Documents Overview:
   a. Case Study w/ Results – Case study with measured and verified results
   b. Project Invoices – All invoices associated with the project
   c. Customer Satisfaction Documentation – customer acknowledge satisfaction with comfort and/or performance (can be in the form of an email or letter)
   d. Training Documentation – documentation showing staff has been trained to efficiently run equipment

3. Find the project under the New Tasks Section
   a. Click on the project, and it automatically takes you to the Current Task
   b. Click within the box Document Upload: Upload Case Study w/ Results
   c. Click Browse, select your document
   d. Click Upload File

4. Each required document will have an individual task assigned. Once you have uploaded the first document, the next task will appear. Repeat steps a. – d. to ensure the applicable documentation is uploaded in the appropriate Document Upload box.

5. Once you have successfully submitted all required documentation, OPPD will review and approve as applicable. Rebate amounts will be calculated based upon $500 per actual kW of peak demand reduction, based on M&V, and cannot exceed 50% of the total project cost.

6. If there have been any changes to the scope of the project click on the Send Us A Message box and input your changes
Dashboard Overview

Navigating the Dashboard

**Left hand column** – Apply Now, Manage Applications, Contact Us

**Apply Now:** Select this to enter prescriptive applications (you may also enter applications by going to Trade Ally Central and selecting “Prescriptive Application” – You must go to Trade Ally Central to enter Custom Applications and select “Custom Application”).

**Manage Applications:** This will bring up your dashboard.

**Contact Us:** This will send us an email but it will not be stored in the notes section of any application or on your dashboard. If you are communicating about an application that has been entered into the system it is better to utilize the SEND US A MESSAGE option within the specific application as those notes stay with the application for future reference.
Quick Actions:

My Applications: Contains both My Incomplete Applications and My Submitted Applications and allows you to view them individually. You may search within the My Submitted Applications by entering the Project Name, Contract, Project Number or Status.

My Contacts: Lists the contacts you have saved in the system – you may edit or delete them or add a new contact.

My Account: This allows you to change your password.

Log Out: Logs you out of your account.

Analytics:

# of Applications: Total number of applications that have been entered regardless of their status.

Total Rebates Paid: Total amount of all rebates paid on projects you entered. Clicking on this provides a list showing the project, contact name, address of project, amount of rebate, check date and check number. There is also a link to view each project. You can “search” by any of these options.

Tasks:

This will show you all outstanding tasks that need to be completed by you for the rebate to move forward. Most frequently you will see that you need upload invoices as the next step of the rebate process.

Clicking on the customer name next to the green “1 task(s) to complete” will take you to the specific task.
Applications by Status:

Shows the status of each application and the number of applications you presently have in this status. By clicking on any of the statuses it will take you to a list of application in that status.

<table>
<thead>
<tr>
<th>Status</th>
<th># of Apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Completed</td>
<td>16</td>
</tr>
<tr>
<td>Application Denied</td>
<td>10</td>
</tr>
<tr>
<td>Awaiting Invoice</td>
<td>2</td>
</tr>
<tr>
<td>CIES Pre-Approval</td>
<td>1</td>
</tr>
</tbody>
</table>

### Status Definitions

<table>
<thead>
<tr>
<th>Application Completed</th>
<th>Completed and paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Denied</td>
<td>Application has been denied. See notes section within the project for specifics</td>
</tr>
<tr>
<td>Awaiting Invoice</td>
<td>Project needs invoice uploaded</td>
</tr>
<tr>
<td>CIES Pre-Approval PM Pre-Approval</td>
<td>Currently in Pre-Approval process</td>
</tr>
<tr>
<td>Payment Processing CIES Final Approval</td>
<td>Final documents are being reviewed for rebate processing</td>
</tr>
</tbody>
</table>

You Have Messages: Here you will find any messages that OPPD has posted to your applications. Now, these messages will also send you an automated email notifying you when a note has been added. You may click on the “Project Name/Number” to read the message. Once you click on the message to read it the number of messages will decrease and the message will stay with the application.

Below is an example of a message left by OPPD.

<table>
<thead>
<tr>
<th>Date</th>
<th>Message From</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUG 24 2018 3:13PM</td>
<td>DALLON</td>
<td>Rebate limited due to max rebate not to exceed 50% of material cost to the customer.</td>
</tr>
</tbody>
</table>
If you would like to respond to the message, you may do so by clicking on “SEND US A MESSAGE” this message will also be permanently attached with a time and date stamp to the application.

MESSAGES
Below are messages sent between you and the program administrator.

<table>
<thead>
<tr>
<th>Date</th>
<th>Message From</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOV 5 2018 4:32PM</td>
<td>CUSTOMER</td>
<td>MESSAGE EXAMPLE</td>
</tr>
<tr>
<td>AUG 24 2018 3:36PM</td>
<td>DTALLON</td>
<td>REBATE LIMITED DUE TO MAX REBATE NOT TO EXCEED 50% OF MATERIAL COST TO THE CUSTOMER</td>
</tr>
</tbody>
</table>

Viewing Applications
Click My Applications on your Quick Action section of your dashboard. This will bring up saved applications that have not been submitted, as well as completed applications.

Select the application you wish to view under the My Submitted Application section.
The following information will appear:

**Project #:** Unique number assigned to the project to aide in tracking.

**Project Name:** The name you assigned the project when you completed the application

**Program:** This will be BUSINESS PRESCRIPTIVE OR BUSINESS CUSTOM based on application.

**Project Status:** This will match what is shown on your dashboard.

**Customer Contact Information and Project Physical Location:** Shows the customer contact information and premise information entered on the application, (click on it to see).

**Payee Information:** Shows who the rebate was made out and sent to, (click on it to see).

**Trade Ally Information:** Shows your information (click on it to see – update with OPPD if it is incorrect!).

**Your rebate has been approved:** Shows the amount the rebate check was made in. An amount will only appear AFTER a rebate check has been approved prior to that there will be other information in this area.

**NOTE:** To find the preapproved amount of the rebate you will need to look in to the “Documents & Files” section and click on the “Project Pre-Approval Notification”
“MESSAGES” section shows all the correspondence regarding the project. This is also where you can send OPPD a message applicable to the project such as a change in the fixture count, a change in the invoice, ask for an extension or ask a question. You may also comment back on a message that has been posted by OPPD.

**MESSAGES**

Below are messages sent between you and the program administrator.

SEND US A MESSAGE

<table>
<thead>
<tr>
<th>Date</th>
<th>Message From</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUG-21 2018 7:22PM</td>
<td>DTallon</td>
<td>PAR LAMP BEING SPEC'D FOR 100W INCANDESCENT NOT SHOWN ON DOCUMENTATION SUBMITTED TO BE A QUALIFIED PRODUCT.</td>
</tr>
</tbody>
</table>

“CURRENT TASKS” if there are no current tasks nothing will show.

**CURRENT TASKS**

Below are outstanding tasks you currently need to complete. Click on the icon to the right of each task to perform the required activity.

**FORMS**

**FORMS**

Below is a list of all of the forms you’ve filled out for this project. Click on a form below to view its details.

“DOCUMENTS & FILES” shows the documents and files associated with the project.

- **Documents** shows all status emails that have been sent regarding the project (there will be two of each email signifying that one went to the Trade Ally and one went to the listed customer)
- **Files** shows all files that have been uploaded to the project (Ex. AHRI Certificates, Cut Sheets, Invoices)
“EQUIPMENT” shows the equipment entered within the application. 
NOTE: Once an application has been submitted, equipment information cannot be modified from the dashboard. If equipment needs to be updated, Send Us A Message within the Messages section and provide a description of what needs to be edited and your reasoning.

Clicking on the pencil shows more detail (shown below)
Commonly Asked Questions

FAQ’s will be updated periodically on our website, be sure to check on Trade Ally Central for updated questions and tips.

1. Where do I find the rebate amount that has been paid?

For projects that have been completed you will find this when you open the project on the project screen.

![Your rebate has been approved: $2,336.00]

2. Where do I find the rebate amount that has been preapproved?

For projects that have not been completed by looking in “DOCUMENTS AND FILES” and opening the “Project Pre-Approval Notification”. It will open a copy of the pre-approval email stating the pre-approved amount and the invoice due date.
3. How do I change something on the application once it has been submitted?

After the application has been submitted, it can only be changed by OPPD. If you need something changed or updated, leave a message explaining what needs to be done by using the Send Us A Message button.

MESSAGES

Below are messages sent between you and the program administrator.

SEND US A MESSAGE

If a new document needs uploaded explain that in the message and then copy the message into an email, attach the application to the email and send to businessrebates@oppd.com and we will upload it.

4. How do I upload an invoice?

Go to the CURRENT TASKS on the Project Screen and click on the icon. This will take you to a screen where you can upload the invoice.

5. How do I upload multiple cut sheets or multiple invoices for the same project?

The system allows for one document to be uploaded for each required document. Meaning if you have 3 different cut sheets for one lighting project you have to put them in one document and upload. This can be done a number of ways. One of the simplest is to open a WORD document and copy and paste each of the cut sheets into one word document and name it “project cut sheets” then, upload. The example below shows ARHI Certificates instead of Cut Sheets (the process is the same).

Highlight and “copy” the entire document.
Then open a word document and “paste” the documents. Continue until all cut sheets/AHRI certificates are added to the word document.

6. How do I make complicated invoices easier to process?

For multiple page invoices that include items that are not rebated or if the quantities on the invoice do not match the pre-approved quantities on a line by line basis your invoice will be delayed in processing. To help please do the following.

Note the “NEW TRACKING #” on the invoice tying the information back to the pre-approved fixture quantities.

Example:

Below is a 26 line project and the “Name” on the items listed all say CUSTOM LIGHTING-OTHER. If each quantity is not unique or fixture counts have changed it is very difficult to process the invoice.
To help click on the pencil, you will see the “NEW TRACKING #”, add it to the invoice (hand written is fine).

Below is the same application where LED RETROFIT KIT and NEW LED FIXTURE are listed. Again, click on the pencil, to reveal the “NEW TRACKING #” and add it to the invoice.
7. How do I find out which project a rebate is attributed to?

Go into the dashboard under “Analytics” and click on “Total Rebates Paid”

Then enter information from the check (only one item is needed) and click search.

**Amount:** Amount the check is made out for (do not use a comma if the amount if in the thousands, you may or may not use a “$” and you don’t need to include “cents”).
8. **How do I check the status of an application?**

Go to the dashboard under “Applications By Status”

Click on the different statuses to see what projects are included (you can also drill into the projects).

9. **Do I have to upload a W-9?**

Yes. A completed and signed W-9 is a required document for the person or entity receiving the rebate check.

10. **How do I send a message to OPPD?**

Go to the “messages” section of the application and click on SEND US A MESSAGE. You will also see all messages OPPD has posted regarding the application in this area. Do not email businessrebates@oppd.com in regard to projects that have been submitted as those emails will not be attached to the project.
11. I uploaded the wrong invoice. What do I do?

Leave a message stating that you uploaded the wrong invoice then copy that message into an email attach the invoice and send the invoice to businessrebates@oppd.com. Reference the project number in the email Subject line.

12. The fixture counts changed from the original project. What do I do?

Leave a message explaining the situation and we will make the adjustment.

NOTE: Once items have been uploaded and submitted they can only be updated and changed by OPPD. Any requested changes need to be documented in the “Messages” section of the project application.

13. Will funding really be redirected if I don’t submit an invoice by the due date?

Yes, the system is automated to redirect the funding for any project if the due date arrives and an invoice has not been submitted.

14. Are cut sheet required for all LED lighting?

No, cut sheets are only required for LED lighting that you have entered as “Custom”. However, the application must have an upload in order to be accepted. If there are no items that are “Custom” simply upload a document which says “No Cut Sheets Required” or you may still upload cut sheets if you’d like.

```
No Custom lighting items. No Cut Sheets Required.
```

15. Can an occupancy sensor qualify if it controls less than three fixtures?

On its own it can’t but if there are occupancy sensors on each fixture you may count the total number of fixtures controlled by occupancy sensors and divide by three (and deduct any remainder) to come up with a rebate amount. However, if the occupancy sensor controls more than three fixtures you cannot receive a rebate for an increased number of occupancy sensors.

**EXAMPLE 1:** 10 Fixtures installed each with occupancy sensors - 10 fixtures, 10 sensors = 10/3 = 3.33 (deduct the .3 remainder to arrive at a total of 3).

**EXAMPLE 2:** 10 Fixtures installed with a total of 2 occupancy sensors – rebate is for actual number of occupancy sensors (2).
*Program Terms & Conditions and Requirements*

**Lighting Program Terms & Conditions**

*Program rules and details are subject to change without notice.*

**Qualifications for Program**

Participant **must be an OPPD business customer with OPPD accounts in good standing**. A building receiving a Custom Rebate **may not qualify for prescriptive Rebates or vice versa in the same calendar year**. OPPD will exercise its right to limit rebate on any building to ensure that results are not counted twice.

**Rebate Funding Requirements**

All rebates will **require pre-approval by OPPD to ensure payment**. OPPD’s pre-approval is required before ordering any material or starting any work at the project site, including demolition work.

**General Terms and Conditions**

1. This program is subject to change or cancellation without notice.
2. OPPD reserves the right to verify sales transactions and inspect projects prior to and after installation.
3. OPPD reserves the right to install a metering device on existing and new equipment to verify energy savings.
4. Rebates are available on a first come, first served basis.
5. OPPD reserves the right to limit rebates. Refer to “Project Requirements” for established rebate limits.
6. Submitting incomplete or missing information will delay processing of the rebate.
7. The customer/contractor certifies that each energy efficiency measure compiles with all federal, state, and local safety, building and environmental codes.
8. OPPD is granted the right to publicize your participation in the program, unless you specifically state otherwise in writing.
9. Falsifying any information may lead to cancellation of this and future rebate applications, a claim by OPPD for the return of any rebate payments, and/or the exercise by OPPD of available legal remedies.
10. OPPD shall own all rights to existing and future emissions credits, efficiency certificates, renewable energy credits, tradable renewable certificates and/or any and all other environmental benefits associated with the implementation of all projects that receive OPPD rebates.

**Energy Policy Act of 2005 – Tax Credits**

Consult your tax advisor for any applicable federal tax incentives available for installation of energy efficient equipment.

**Nebraska Energy Office Energy Efficiency Loan Program**

Consult the Nebraska Energy Office regarding their 2½% Loan Program as a financing option.

**Disclaimers**

1. OPPD does not offer any warranty or guarantee of any kind, express or implied, as to the performance of any equipment installed by or on behalf of customer.
2. OPPD expressly disclaims all warranties, express or implied by law, including but not limited to any warranty of fitness for a particular purpose or warranty of merchantability with respect to equipment installed by or on behalf of customer.
3. OPPD does not endorse any manufacture, contractor, or vendor, or any product or system design. Customer is solely responsible for the contracting of and payment for any equipment installed on the customer’s premises. There is no contractual relationship, express or implied, created between OPPD and any vendor, contractor or other person or entity hired by customer to design, install, maintain or repair customer equipment.
4. The customer/contractor is responsible for the proper disposal and/or recycling of any waste generated as a result of this project.
5. **OPPD shall not have any liability to customer or to any third party for any injury (including death), loss, damage, cost or expense of any kind (“Liabilities”) arising from or related to any equipment on customer’s premises for which OPPD pays a rebate under this program. Customer shall indemnify, defend and hold harmless OPPD and its directors, officers and employees from any such Liabilities.**

6. **OPPD is not responsible for any tax liability imposed on the customer as a result of rebate funding. Consult your tax advisor for more information.**

**Project Requirements**

1. Project completion shall be within three (3) months of OPPD pre-approval in order for rebate funding to be available. Any project completed after three (3) months may no longer be funded.
2. Rebates must be $100 or greater in order to qualify.
3. The maximum rebate amount will be **$40,000 per facility per calendar year** (there may be more than one lighting project for a facility provided the calendar year total is less than $40,000).
4. OPPD reserves the right to limit any rebate payment to not exceed 50% of the total material/equipment cost for the project.

**Additional Criteria and Disclaimers**

1. **Outdoor lighting projects are not eligible for prescriptive nor custom lighting rebates.**
2. A custom lighting rebate cannot be used if a prescriptive lighting option is listed under “Lighting Configurations.”
3. All LED lamps and fixtures must be currently listed as qualified by [Energy Star](https://www.energystar.gov), [Lighting Design Lab (LDL)](https://www.lightsdlab.org) or [the Design Lights Consortium (DLC)](https://www.designlights.org).
4. Replaced equipment must be removed from service with any and all hazardous waste components recycled.
5. Equipment must be installed and operating prior to submission of invoice to OPPD.
6. Parking garage projects are eligible for rebates.
7. Post installation light levels are expected to meet current IESNA recommendations and comply with all applicable electrical, safety and energy codes.
8. Lighting rebates are for existing buildings only. **New construction projects do not qualify.**
9. Replacements are one for one unless specified and pre-approved by OPPD.
10. LED refrigerated reach-in case lighting requires that existing linear fluorescent lighting be completely removed which includes fluorescent end connectors and ballasts.
11. Occupancy sensors must control a minimum of three fixtures (no maximum), in order to qualify. If a sensor controls less than three fixtures, you may take the total number of fixtures with sensors and divide by three. An Occupancy Sensor rebate CAN be combined with a Daylight Harvesting Sensor rebate OR an Embedded Fixure Control rebate.
12. Any LED fixture that automatically adjusts illumination due to the effect of daylight qualifies as a Daylight Harvesting Sensor for the purposes of OPPD’s 2020 Lighting Controls rebate. Daylight Harvesting Sensors CAN be combined with an Occupancy Sensor rebate but CANNOT be combined with an Embedded Fixture Control rebate.
13. A lighting technology that controls individually addressable lamps and/or a digitally adjustable fixture is considered an Embedded Fixture Control for the purposes of OPPD’s 2020 Lighting Controls rebate. Lamps with embedded control and digitally adjustable fixtures must be DLC approved in order to qualify. Embedded Fixture Controls CAN be combined with an Occupancy Sensor rebate but CANNOT be combined with a Daylight Harvesting Sensor rebate.

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1 If a prescriptive retrofit utilizes more or less fixtures than currently installed, a custom rebate may be used even if a prescriptive option is available, provided the customer rebate is preapproved by OPPD.
2 Parking garage, for the purpose of this rebate program, is defined as a roofed structure that houses vehicles and due to size and/or shape require that lights are on and operational Monday through Friday during daylight hours.
HVAC Program Terms & Conditions

Program rules and details are subject to change without notice.

Qualifications for Program

Participant must be an OPPD business customer with OPPD accounts in good standing. A building receiving a Custom Rebate may not qualify for prescriptive Rebates or vice versa in the same calendar year. OPPD will exercise its right to limit rebate on any building to ensure that results are not counted twice.

Rebate Funding Requirements

All rebates will require pre-approval by OPPD to ensure payment. OPPD’s pre-approval is required before ordering any material or starting any work at the project site, including demolition work.

General Terms and Conditions

11. This program is subject to change or cancellation without notice.
12. OPPD reserves the right to verify sales transactions and inspect projects prior to and after installation.
13. OPPD reserves the right to install a metering device on existing and new equipment to verify energy savings.
14. Rebates are available on a first come, first served basis.
15. OPPD reserves the right to limit rebates. Refer to “Project Requirements” for established rebate limits.
16. Submitting incomplete or missing information will delay processing of the rebate.
17. The customer/contractor certifies that each energy efficiency measure compiles with all federal, state, and local safety, building and environmental codes.
18. OPPD is granted the right to publicize your participation in the program, unless you specifically state otherwise in writing.
19. Falsifying any information may lead to cancellation of this and future rebate applications, a claim by OPPD for the return of any rebate payments, and/or the exercise by OPPD of available legal remedies.
20. OPPD shall own all rights to existing and future emissions credits, efficiency certificates, renewable energy credits, tradable renewable certificates and/or any and all other environmental benefits associated with the implementation of all projects that receive OPPD rebates.


Consult your tax advisor for any applicable federal tax incentives available for installation of energy efficient equipment.

Nebraska Energy Office Energy Efficiency Loan Program

Consult the Nebraska Energy Office regarding their 2 ½ % Loan Program as a financing option.

Disclaimers

7. OPPD does not offer any warranty or guarantee of any kind, express or implied, as to the performance of any equipment installed by or on behalf of customer.
8. OPPD expressly disclaims all warranties, express or implied by law, including but not limited to any warranty of fitness for a particular purpose or warranty of merchantability with respect to equipment installed by or on behalf of customer.
9. OPPD does not endorse any manufacture, contractor, or vendor, or any product or system design. Customer is solely responsible for the contracting of and payment for any equipment installed on the customer’s premises. There is no contractual relationship, express or implied, created between OPPD and any vendor, contractor or other person or entity hired by customer to design, install, maintain or repair customer equipment.
10. The customer/contractor is responsible for the proper disposal and/or recycling of any waste generated as a result of this project.
11. OPPD shall not have any liability to customer or to any third party for any injury (including death), loss, damage, cost or expense of any kind (“Liabilities”) arising from or related to any equipment on
customer’s premises for which OPPD pays a rebate under this program. Customer shall indemnify, defend and hold harmless OPPD and its directors, officers and employees from any such Liabilities.

12. OPPD is not responsible for any tax liability imposed on the customer as a result of rebate funding. Consult your tax advisor for more information.

**Project Requirements**

5. Project completion shall be within three (3) months of OPPD pre-approval in order for rebate funding to be available. Any project completed after three (3) months may no longer be funded.
6. Rebates must be $100 or greater in order to qualify.
7. The maximum rebate amount will be **$100,000 per facility per calendar year** (there may be more than one HVAC project for a facility provided the calendar year total is less than $100,000).
8. OPPD reserves the right to limit any rebate payment to not exceed 50% of the total material/equipment cost for the project.

**Additional Criteria and Disclaimers**

14. Replaced equipment must be removed from service.
15. Equipment must be installed and operating prior to submission of invoice to OPPD.
16. Replacements are one for one unless specified and pre-approved by OPPD.
17. Both new construction and replacement cooling and heat pumps are eligible for HVAC Rebates.
18. Conversion and new construction heat-pumps qualify for an additional rebate of $50 per nominal ton regardless of efficiency level.

**ARC Program Terms & Conditions**

Program rules and details are subject to change without notice.

Qualifications for Program

Participant must be an OPPD business customer with OPPD accounts in good standing. A building receiving a Custom Rebate may not qualify for Prescriptive Rebates or vice versa in the same calendar year. OPPD will exercise its right to limit rebates on any building to ensure that results are not counted twice.

Rebate Funding Requirements

All rebates will require preapproval by OPPD to ensure payment. OPPD’s pre-approval is required before ordering any material or starting any work at the project site, including demolition work.

General Terms and Conditions

21. This program is subject to change or cancellation without notice.
22. OPPD reserves the right to verify sales transactions and inspect projects prior to and after installation.
23. OPPD reserves the right to install a metering device on existing and new equipment to verify energy savings.
24. Rebates are available on a first come, first served basis.
25. OPPD reserves the right to limit rebates. Refer to “Project Requirements” for established rebate limits.
26. Submitting incomplete or missing information will delay processing of the rebate.
27. The customer/contractor certifies that each energy efficiency measure compiles with all federal, state, and local safety, building and environmental codes.
28. OPPD is granted the right to publicize your participation in the program, unless you specifically state otherwise in writing.
29. Falsifying any information may lead to cancellation of this and future rebate applications, a claim by OPPD for the return of any rebate payments, and/or the exercise by OPPD of available legal remedies.
30. OPPD shall own all rights to existing and future emissions credits, efficiency certificates, renewable energy credits, tradable renewable certificates and/or any and all other environmental benefits associated with the implementation of all projects that receive OPPD rebates.

Consult your tax advisor for any applicable federal tax incentives available for installation of energy efficient equipment.

Nebraska Energy Office Energy Efficiency Loan Program
Consult the Nebraska Energy Office regarding their 2 ½ % Loan Program as a financing option.

Disclaimers
13. OPPD does not offer any warranty or guarantee of any kind, express or implied, as to the performance of any equipment installed by or on behalf of customer.
14. OPPD expressly disclaims all warranties, express or implied by law, including but not limited to any warranty of fitness for a particular purpose or warranty of merchantability with respect to equipment installed by or on behalf of customer.
15. OPPD does not endorse any manufacture, contractor, or vendor, or any product or system design. Customer is solely responsible for the contracting of and payment for any equipment installed on the customer’s premises. There is no contractual relationship, express or implied, created between OPPD and any vendor, contractor or other person or entity hired by customer to design, install, maintain or repair customer equipment.
16. The customer/contractor is responsible for the proper disposal and/or recycling of any waste generated as a result of this project.
17. OPPD shall not have any liability to customer or to any third party for any injury (including death), loss, damage, cost or expense of any kind (“Liabilities”) arising from or related to any equipment on customer’s premises for which OPPD pays a rebate under this program. Customer shall indemnify, defend and hold harmless OPPD and its directors, officers and employees from any such Liabilities.
18. OPPD is not responsible for any tax liability imposed on the customer as a result of rebate funding. Consult your tax advisor for more information.

Project Requirements
1. Project completion shall be within three (3) months of OPPD preapproval in order for rebate funding to be available. Any project completed after three (3) months may no longer be funded.
2. Rebates must be $100 or greater in order to qualify.
3. The maximum rebate amount will be $100,000 per facility per calendar year (there may be more than one lighting project for a facility provided the calendar year total is less than $100,000).
4. OPPD reserves the right to limit any rebate payment to not exceed 50% of the total material/equipment cost for the project.
5. OPPD requires a three (3) year service agreement on the RTU in order to qualify for this rebate and reserves the right to request a copy of that service agreement. This service agreement should follow the recommendations of ASHRAE/ACCA Standard 180-2018.
6. OPPD may select the ARC installation for a short term measurement and verification project. This will include the placement of a data logger on the RTU prior to the ARC installation and will remain in place as needed to determine actual installment results. The customer will be notified of this selection prior to preapproval and will have the option to opt out. Participation will validate the savings to the customer and the customer will receive an additional consideration for their participation.

Additional Criteria and Disclaimers
1. Only retrofits devices/controllers expressly shown on the application form are eligible for any rebate.
2. Retrofit devices/controllers must be installed and operating prior to submission of invoice to OPPD.
3. Retrofit devices/controllers are one to one with the RTU unless specified and preapproved by OPPD.

Custom Program Terms & Conditions

Program rules and details are subject to change without notice.

Qualifications for Program

Participant must be an OPPD business customer with OPPD accounts in good standing. A building receiving a Custom Rebate may not qualify for prescriptive Rebates or vice versa in the same calendar year. OPPD will exercise its right to limit rebate on any building to ensure that results are not counted twice.

Rebate Funding Requirements

All rebates will require pre-approval by OPPD to ensure payment. OPPD’s pre-approval is required before ordering any material or starting any work at the project site, including demolition work.

General Terms and Conditions

1. This program is subject to change or cancellation without notice.
2. OPPD reserves the right to verify sales transactions and inspect projects prior to and after installation.
3. OPPD reserves the right to install a metering device on existing and new equipment to verify energy savings.
4. Rebates are available on a first come, first served basis.
5. OPPD reserves the right to limit rebates. Refer to “Project Requirements” for established rebate limits.
6. Submitting incomplete or missing information will delay processing of the rebate.
7. The customer/contractor certifies that each energy efficiency measure complies with all federal, state, and local safety, building and environmental codes.
8. OPPD is granted the right to publicize your participation in the program, unless you specifically state otherwise in writing.
9. Falsifying any information may lead to cancellation of this and future rebate applications, a claim by OPPD for the return of any rebate payments, and/or the exercise by OPPD of available legal remedies.
10. OPPD shall own all rights to existing and future emissions credits, efficiency certificates, renewable energy credits, tradable renewable certificates and/or any and all other environmental benefits associated with the implementation of all projects that receive OPPD rebates.


Consult your tax advisor for any applicable federal tax incentives available for installation of energy efficient equipment.

Nebraska Energy Office Energy Efficiency Loan Program

Consult the Nebraska Energy Office regarding their 2 ½ % Loan Program as a financing option.

Disclaimers

1. OPPD does not offer any warranty or guarantee of any kind, expressed or implied, as to the performance of any equipment installed by or on behalf of customer.
2. OPPD expressly disclaims all warranties, expressed or implied by law, including but not limited to any warranty of fitness for a particular purpose or warranty of merchantability with respect to equipment installed by or on behalf of customer.
3. OPPD does not endorse any manufacture, contractor, or vendor, or any product or system design. Customer is solely responsible for the contracting of and payment for any equipment installed on the customer’s premises. There is no contractual relationship, expressed or implied, created between OPPD and any vendor, contractor or other person or entity hired by customer to design, install, maintain or repair customer equipment.
4. The customer/contractor is responsible for the proper disposal and/or recycling of any waste generated as a result of this project.

5. OPPD shall not have any liability to customer or to any third party for any injury (including death), loss, damage, cost or expense of any kind (“Liabilities”) arising from or related to any equipment on customer’s premises for which OPPD pays a rebate under this program. Customer shall indemnify, defend and hold harmless OPPD and its directors, officers and employees from any such Liabilities.

6. OPPD is not responsible for any tax liability imposed on the customer as a result of rebate funding. Consult your tax advisor for more information.

**Project Requirements**

1. The demand reduction must be deemed by OPPD to be sustainable for no less than five (5) years and not be a demand response strategy.

2. The Energy Study Rebate amount will be up to 50% of the cost of the Energy Study with a not to exceed amount of $10,000.

3. The Custom Rebate amount will be $500 per actual kW of peak demand reduction (see “M&V Guidelines”) and cannot exceed 50% of the total project cost with a not to exceed amount of $100,000* per project.

4. The Energy Study Rebate payment and 30% of the expected kW peak demand rebate will be made upon OPPD review and approval of the following:
   a. Custom Rebate Application
   b. Copy of the Energy Study
   c. Energy Study invoice
   d. Commitment to move forward with Custom implementation project upon OPPD’s pre-approval

5. The Custom Rebate payment will be made, with amount to vary depending on the peak demand reduction attained, and upon OPPD review and approval. If the peak demand reduction attained is less than what has already been paid OPPD may exercise their right to have the overpayment returned.

6. **Eligible Equipment**: Equipment must be new, installed and operational at the customer’s existing facility. **New construction and/or additions do not qualify for the program.**

7. The Trade Ally is responsible for producing the final case study documenting kW reduction.

8. The Custom Rebate is paid post project completion and post OPPD billing months of June-September* and pending OPPD case study approval.

9. **Proof of Purchase**: Sales receipt(s) or invoice(s) itemizing the new equipment and/or labor provided must be submitted to OPPD after installation is completed. Equipment invoices must indicate the size, type, make, model, purchase date, vendor and AHRI Certificate of Product Ratings as applicable.

10. The project must be completed and the required documents (including the case study), submitted by the due date provided on the original application with a maximum of 24 months from the date of preapproval, in order to ensure project rebate funding will be available.

11. A Professional Engineer (PE) will be required for many projects including most optimization projects. For other custom rebates, a Trained Professional in the field of the project will be required. For equipment change outs only, an engineer of record will not be required. If you have questions regarding professional qualifications of the team, please contact us.

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1 For industrial process, lighting and similar projects that generally are steady state throughout the year and NOT affected by seasonal conditions (e.g. unlike thermal conditioning). The average of the peak demand reduction for the four (4) billing months’ post project completion may be utilized instead of the billing months of June – September. **This exception will be documented in the OPPD pre-approval for qualifying projects.**

**M&V Guidelines** are based on IPMVP other M&V options may be available based on the scope of the project:
1. OPPD Bill comparing an average peak demand reduction from the months of June, July, August and September post project completion to the baseline. (This follows IPMVP Option C) weather normalization will not be used at this time for kW savings. This approach may not be approved if it is determined the peak demand reduction is not substantial enough to be accurately captured by bill comparisons (example if the peak demand reduction is expected to be less than 3% of normal annual cyclic variation). The average peak demand reduction from the months of June, July, August and September will be calculated as follows: Add the peak on the OPPD bill for the 4 months, which the majority of the days of these months are shown. Take that number and divide it by 4 to establish the baseline. Add the same four billing periods post project completion and divide that number by 4. Then, deduct the post completion average from the baseline to determine the peak demand reduction.

Assume in both “PRE CONSTRUCTION” cases below, nominal historic year-to-year variation approximates 5kW.

**EXAMPLE: Passes**

<table>
<thead>
<tr>
<th>Bill Dates - Pre</th>
<th>Peak kW</th>
<th>Bill Dates - Post</th>
<th>Peak kW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jun 10 - Jul 8</td>
<td>200</td>
<td>Jun 8 - Jul 7</td>
<td>187</td>
</tr>
<tr>
<td>Jul 8 - Aug 9</td>
<td>257</td>
<td>Jul 7 - Aug 8</td>
<td>220</td>
</tr>
<tr>
<td>Aug 9 - Sep 9</td>
<td>272</td>
<td>Aug 8 - Sep 8</td>
<td>241</td>
</tr>
<tr>
<td>Sep 9 - Oct 10</td>
<td>236</td>
<td>Sep 8 - Oct 9</td>
<td>210</td>
</tr>
<tr>
<td><strong>Total Peak</strong></td>
<td><strong>965</strong></td>
<td><strong>Total Peak</strong></td>
<td><strong>858</strong></td>
</tr>
<tr>
<td><strong>Number of Months</strong></td>
<td><strong>4</strong></td>
<td><strong>Number of Months</strong></td>
<td><strong>4</strong></td>
</tr>
<tr>
<td><strong>Ave Peak Pre</strong></td>
<td><strong>241.25</strong></td>
<td><strong>Ave Peak Post</strong></td>
<td><strong>214.5</strong></td>
</tr>
</tbody>
</table>

**EXAMPLE: Fail (percentage savings too low)**

<table>
<thead>
<tr>
<th>Bill Dates - Pre</th>
<th>Peak kW</th>
<th>Bill Dates - Post</th>
<th>Peak kW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jun 10 - Jul 8</td>
<td>200</td>
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<td>250</td>
</tr>
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<td>Aug 9 - Sep 9</td>
<td>272</td>
<td>Aug 8 - Sep 8</td>
<td>262</td>
</tr>
<tr>
<td>Sep 9 - Oct 10</td>
<td>236</td>
<td>Sep 8 - Oct 9</td>
<td>234</td>
</tr>
<tr>
<td><strong>Total Peak</strong></td>
<td><strong>965</strong></td>
<td><strong>Total Peak</strong></td>
<td><strong>941</strong></td>
</tr>
<tr>
<td><strong>Number of Months</strong></td>
<td><strong>4</strong></td>
<td><strong>Number of Months</strong></td>
<td><strong>4</strong></td>
</tr>
<tr>
<td><strong>Ave Peak Pre</strong></td>
<td><strong>241.25</strong></td>
<td><strong>Ave Peak Post</strong></td>
<td><strong>235.25</strong></td>
</tr>
</tbody>
</table>

**Difference** 27  
kW reduction in % 11%

NOTE: Round the difference up to a whole number.

2. Sub-meter of entire system associated with the Custom measure(s). For permanent sub-meters, a comparison of the months of June, July, August, and September post project completion to the baseline. For short term sub-meters (including a minimum of 3 weeks of hot weather), peak kW reduction is determined by comparison of kW data trended for baseline and post during the hottest weather condition. (This follows IPMVP Option B)

3. Sub-meter individual pieces of equipment included in the project and extrapolate those results to be projected to like pieces of equipment if operated with similar load characteristics. (This follows IPMVP Option A). Typically, a short term sub-meter (including a minimum of 3 weeks of hot weather) is used, peak kW reduction is determined by comparison of kW data trended for baseline and post during the hottest weather condition.

If there are events that set atypical peaks either pre or post those events will be required to be removed from analysis following common engineering practices to set accurate baselines and results.

Raw M&V data may be required to be submitted to OPPD for audit purposes.
*Projects with expected rebate amounts above $100,000 may be approved by OPPD and will be considered on a case by case basis.

What to expect after receiving pre-approval

- After the pre-approval, the remaining Custom Rebate funding will be reserved until the estimated case study/savings report submittal date provided on the initial application, (if there is a need for an extension, you must notify OPPD and have that extension approved to ensure funding).
- Once project is complete, the Custom Rebate payment will be made, with amount to vary depending on the peak demand reduction attained, and upon OPPD review and approval of the following (as applicable):
  a. Trade Ally generated case study/energy savings report comparing baseline energy consumption to post project consumption following approved M&V method for the project, the OPPD billing months of June – September post project completion as determined necessary by the M&V plan and showing energy saving achieved (see “M&V Guidelines”)
  b. Project implementation invoice
  c. Customer’s satisfaction of occupant comfort (as applicable and within the capabilities of the HVAC system for HVAC related projects).
  d. Customers’ receipt of documentation from the Trade Ally
  e. Training of customer facility staff

**NOTE:** Final payment will be made on actual savings attained **NOT** on savings projected in the Energy Study.

- You will be notified via email to remind of the funds reservation expiration; unless OPPD is notified of the need for an extension and grants that extension the funds will no longer be available after the due date provided on the original application. You may re-apply for another project at the same building after the existing funds have no longer been reserved and the application has been removed.