

2017 Energy Efficiency Business Rebates Application



Section 1 > How to Apply

- All rebate applications must be submitted online at sdge.com/bizrebates. All online applications will undergo a 3 day review period. Within 3 days, you will receive a notification providing additional submission instructions for the installation of your products.
Pre-inspections for On-Bill Financing projects, past participation, or a number of products outlined in the rebate catalog will be initiated through the online application. Do not install the equipment until the pre-inspection has been completed and you have received a notice-to-proceed.
- Refer to the Energy Efficiency Business Rebates Product Catalog for terms, conditions, and eligibility prior to purchasing and installing equipment
- Installation must take place prior to submitting an application. If a pre-inspection is conducted because of an On-Bill Financing project, past participation, or the product required a pre-inspection to be conducted, please wait for a Notice to Proceed prior to installing. Use the Rebate Product table to calculate your rebate. Multiply the quantity purchased (Column A) by the rebate amount (Column B) and record the amount in Column C. A sample application is available at www.sdge.com/tradepro
Rebate project applications must be submitted within 30 days of the project's installation date or final invoice date in order to qualify for rebate processing and payment. The program will accept whichever date is latest. Applications submitted outside the application timeframe will be subject to review and disqualification at the program administrator's discretion.
- Your rebate for each product cannot exceed the purchase and installation cost**
- Include the model number and manufacturer of the equipment on the itemized invoice(s) or receipt(s). Invoice must be paid or include payment terms (e.g., Net 30 days). Also, please include manufacturer's specification sheets that illustrate that the criteria necessary to meet the terms and conditions in the rebate application has been met
- Complete, **sign and date the rebate application**. Make and retain a copy of all submitted documents. NOTE: The following guidelines must be adhered to in order to participate in the program:
 - Applications with any sign of liquid paper ("white out") used to change information will be returned to the customer or contractor
 - Pre-made labels with contractor or customer information (name, address, etc.) are not accepted on rebate applications. However, a contractor stamp is acceptable, as long as there is no possibility of covering up existing information beneath the stamp
- Submit your application online at sdge.com/bizrebates

A rebate check for qualified measures will generally be mailed within 35-45 days after SDG&E receives and approves a completed rebate application. Complete rebate applications consist of all required program documentation, invoice(s), and specification sheet(s). Incomplete applications will be returned for revisions.

Section 2 > Eligibility and Bonus Criteria

- Customers eligible for the SDG&E Energy Efficiency Business Rebates Program are defined as nonresidential commercial, industrial and agricultural customers. However, common areas in multi-family properties (i.e. laundry rooms, recreation rooms, offices) are eligible, provided those areas are on a qualified nonresidential rate schedule.
- The total rebate limit is \$1,000,000 per premise.
 - A premise is defined as all of the real property and apparatus employed in a single enterprise on an integral parcel of land undivided, excepting in the case of industrial, agricultural, oil field, resort enterprises and public or quasi-public institutions, by a dedicated street, highway or other public thoroughfare or a railway. Automobile parking lots constituting a part of and adjacent to a single enterprise may be separated by an alley from the remainder of the premises served
- PLEASE NOTE: SDG&E has a Direct Install Program for customers with monthly electrical demand under 100 kilowatts (kW). This program provides a number of energy and money-saving services for qualifying small and medium-sized businesses at no cost. The energy-efficient products offered at no cost may include: fluorescent lighting, refrigeration, LED lamps, HVAC refrigerant charge. For more information visit sdge.com/directinstall or call our Energy Savings Center at 1-800-644-6133**
- Bonus Eligibility & Payment Designation:** Program participants that purchase, install and submit an application between January 1, 2017 and December 8, 2017 are eligible for a 20% bonus based on the value of each qualifying Incentive or Rebate. An Incentive/Rebate qualifies for a bonus when either A) the program participant has received at least 3 Incentives/Rebates in 3 separate categories (see Table 1) or B) 2 Incentives/Rebates in 2 separate categories plus new enrollment in either a Demand Response Program or SDG&E's Retrocommissioning program (see Table 1). Additionally, each individual qualifying Incentive/Rebate payment must equal at least 10% of the total Incentive/Rebate payment. Unlike the Incentive/Rebate payment, the bonus will be issued to the customer of record directly

TABLE 1. COMPREHENSIVE BONUS CATEGORIES

| Measure type | Categories | Minimum Contribution | Measure type | Categories | Minimum Contribution |
|--------------|-------------------|----------------------------------|--------------|---|----------------------------------|
| Electric | Lighting | 10% of Total Incentive or Rebate | Programs | New Participation in SDG&E's Retrocommissioning Program | Participation |
| | HVAC | 10% of Total Incentive or Rebate | | New Enrollment in Demand Response Program | Enrollment |
| | Smart Controls | 10% of Total Incentive or Rebate | Natural Gas | Hot Water/Steam | 10% of Total Incentive or Rebate |
| | Building Envelope | 10% of Total Incentive or Rebate | | Heat Recovery | 10% of Total Incentive or Rebate |
| | Refrigeration | 10% of Total Incentive or Rebate | | Process Heat | 10% of Total Incentive or Rebate |
| | Process | 10% of Total Incentive or Rebate | | | |

*Excludes Clean Gen, Peak Gen, and Peak Time Rebate

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Section 3 > Requirements

- Rebate items must be installed and operational at the San Diego Gas & Electric service account location listed on the rebate application
- All invoices or receipts must be dated between January 1, 2017 and December 8, 2017. All rebate items must be purchased and installed prior to submitting a rebate form
- Customers cannot apply for the same measure through other public goods charge rebates and incentives
- Equipment must meet the requirements and terms and conditions contained in this rebate application. All equipment must be new. Used or rebuilt equipment is not eligible for rebate. Fuel switching and new construction do not qualify. To confirm eligibility and reserve funds before purchasing and installing products, call (800) 644-6133. San Diego Gas & Electric reserves the right to deny payment for products that do not meet the requirements, terms and conditions, as well as installation verification through onsite inspection
- Rebate payments are the property of the applicant (customer). The applicant may assign payment to a third party as outlined on the customer rebate application
- Leased equipment may be eligible for rebate if the agreement term is five years or greater
- **Payers, (Section 10 of this application), must submit a completed W-9 form if you have not already done so for our records, failure to do so could result in your rebate payment being delayed.**

Section 4 > Customer Information

Name of Company

Customer Name as it appears on the SDG&E Bill

Name of Contact Person

Telephone # of Contact Person

Email Address

Company Mailing Address

City

State

Zip

Installation Address

City

State

Zip

Reservation Number

SDG&E Account Number
Please refer to your SDG&E bill for
your Account Number

Section 5 > Project Sponsor Information

Project Sponsor must be listed as a participating Trade Professional with SDG&E's Trade Projection Alliance.

I have entered into a contract with the Project Sponsor indicated below for the installation of energy efficiency measures at the project site listed above. All correspondence will be sent directly to the Project Sponsor specified below. If you are self-sponsoring, correspondence will be directed to the customer.

Company/Business Name of Project Sponsor

Address

City

State

Zip

Name of Contact Person

Title

Telephone # of Contact Person

Email Address

Section 6 > Additional Site Information

Name of Assigned Account Executive (if applicable)

Annual Operating Hours

Check if utilizing OBF Option * Please note: Projects utilizing On-Bill Financing option must submit OBF Application prior to installation.

Sq. Ft. of Building and/or Greenhouse

PROOF OF PURCHASE INCLUDED? YES

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Section 9 > Terms and Conditions

As a qualified San Diego Gas & Electric customer, I certify that I purchased and installed the indicated energy saving products between January 1, 2017 and December 8, 2017 for use in my business facility and not for resale. I have attached documents establishing paid proof of purchase for the items applied for on this rebate application. I agree to verification by San Diego Gas & Electric of both the sales transactions and products installation, and I certify that the information on this rebate application is true and correct, and that the tax ID provided is accurate. I understand that rebate payments are based on related energy benefits over the life of the product. I agree that if:

1. I do not provide San Diego Gas & Electric with 100% of the related energy benefits specified in the rebate application for the life of the product or for a period of five (5) years from receipt of rebate, whichever is less, or
2. I cease to be a distribution customer of San Diego Gas & Electric during said time period I shall refund a prorated amount of rebate dollars to San Diego Gas & Electric based on the actual time period when I provided the related energy benefits as an electric/gas customer of San Diego Gas & Electric.

I understand rebates may be modified or terminated without prior notice. I understand that this rebate application and the paid itemized invoice must be received at San Diego Gas & Electric or postmarked no later than December 8, 2017 and that all equipment must be purchased and installed prior to submission of the rebate application. In no case will the rebate for each product exceed the purchase price and installation cost. The Energy Efficiency Business Rebates Program has a limited budget. Rebate applications will be accepted on a first-come, first-served basis, until allocated funds are spent, or by December 8, 2017, whichever comes first. I agree that I have not received rebates, incentives or services for the same measure(s) from another utility, state, or local program funded by the Public Purpose Program (PPP) or Public Goods Charge (PGC). I have read and understand the requirements and terms and conditions set forth in this rebate application and agree to abide by those requirements. Furthermore, I concur that I must meet all eligibility criteria in order to be paid under this program.

The selection, purchase and ownership of the equipment are the sole responsibility of the customer. San Diego Gas & Electric makes no representation as to the safety, performance, reliability and/or efficiency of the equipment selected or components thereof. San Diego Gas & Electric makes no warranty, whether expressed or implied, including warranty of merchantability or fitness for a particular purpose, use or application of selected equipment or services. It is the customer's responsibility to check with the equipment manufacturer to ensure adherence to state and local building codes and ordinances, as well as the manufacturer's requirements.

Release of Information - If the CPUC requests review of your project, SDG&E will provide the CPUC with all of the information requested without further notification to you. If you refuse to allow the CPUC, its staff or its contractors and/or consultants to have access to your data, you will not be allowed to participate, and you will be ineligible to receive any program rebate. Please note that if you designated a project sponsor, a similar notification has been forwarded to them as well. In the event your project is selected for review, SDG&E will mark your data as confidential before submitting your files to the CPUC in accordance with California Public Utilities Code Section 583 and CPUC General Order 66-C.

On Bill Financing (OBF) - In the event that I qualify and participate in On-Bill Financing offered by San Diego Gas & Electric to obtain financing for the energy saving products listed in this rebate application, I understand that the terms and conditions of participation in On-Bill Financing will supersede the Energy Efficiency Business Rebates program guidelines if there is any conflict between the terms and conditions applicable to participation in Energy Efficiency Business Rebates Program and On-Bill Financing.

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Section 10 > Payment Release Authorization

Please complete this section only if payment is going to someone other than the customer as indicated above.

I AM AUTHORIZING THIS PAYMENT OF MY REBATE TO THE THIRD PARTY NAMED BELOW AND I UNDERSTAND THAT I WILL NOT BE RECEIVING THE REBATE CHECK FROM SDG&E. I UNDERSTAND THAT MY RELEASE OF THE PAYMENT TO THE THIRD PARTY DOES NOT EXEMPT ME FROM THE REBATE REQUIREMENTS OUTLINED IN THIS APPLICATION. I ALSO UNDERSTAND THAT CERTAIN ACCOUNT INFORMATION SUCH AS ACCOUNT NUMBER AND RATE INFORMATION, MAY BE USED BY THE THIRD PARTY AS REQUIRED TO RESOLVE ANY ISSUE PERTAINING TO THIS REBATE. THE LATEST VERSION OF THE W-9 TAX FORM MUST COMPLETED AND SUBMITTED FOR THIRD PARTY PAYMENTS. FAILURE TO DO SO COULD RESULT IN DELAYED REBATE PAYMENT.

| | | | |
|-------------------------------|---------------------|---------------------|-----------|
| Name of Company _____ | | Attention to: _____ | |
| Company Mailing Address _____ | | | |
| | City _____ | State _____ | Zip _____ |
| Telephone # _____ | Email Address _____ | | |

Section 11 > Payee Tax Information

Tax Status: Corporation Exempt Individual/Sole Proprietor Partnership

Tax ID number: Federal Tax ID _____ SSN _____

Tax Liability: The latest version of the W-9 tax form must completed and submitted for customer payments. Failure to do so could result in delayed rebate payment. Rebates are taxable and if greater than \$600.00 will be reported to the IRS. San Diego Gas & Electric will report your rebate as income to you on IRS Form 1099 unless you have checked the Corporation or Exempt tax status above. San Diego Gas & Electric is not responsible for any taxes that may be imposed on your business as a result of your receipt of this rebate.

Section 12 > Sign and Date

HOW DID YOU FIND OUT ABOUT OUR PROGRAM?

CONTRACTOR-INSTALL PROJECTS

I (Project Sponsor) have read and understood the Terms and Conditions. I certify that the information I have provided is true and that I have installed the Energy Efficiency Measures. Additionally, I certify that the equipment has been functionally tested, and are operating in conformity with the requirements of this program. I certify that all applicable permitting requirements were complied with in the installation of this project, and the contractor who performed the work holds the appropriate license for the work performed.

Project Sponsor Signature _____ Company _____ Date _____

SELF-INSTALL PROJECTS

I (Project Sponsor) certify that wage earning employees of the Customer were used to perform the work, pursuant to 7044 exemption in the Contractors' License Law, and all applicable permitting requirements were complied with for this installation. I have read and understood the Terms and Conditions. I certify that the information I have provided is true and that the Energy Efficiency Measures have been installed, functionally tested, and are operating in conformity with the requirements of this program.

ALL PROJECTS

I understand that I am responsible for ensuring Title 24 code compliance of my project. Should SDG&E determine that all of, or portions of a project do not comply with code requirements, SDG&E reserves the right to modify or cancel the rebate amount at any time.

Central Air-Conditioning, Heat Pumps, or Related Fans Installed?

In accordance with California Public Utilities Code section 399.4(b), the customer (or their contractor) must provide SDG&E proof of permit closure before SDG&E will pay any rebate or incentive for the purchase or installation of central air-conditioning, heat pumps, or related fans. Please refer to the Energy Efficiency Rebate Product Catalog for products that require proof of permit closure.

| | | |
|------------------------------------|---------------------------|-------------------------|
| Customer Signature _____ | Date _____ | Installation Date _____ |
| Customer Name (please print) _____ | Total Rebate Amount _____ | |

Note that contractors collecting rebate refunds on behalf of customers are not employed by or working with SDG&E.