

## STEP 1 - RESERVE FUNDS FOR YOUR CUSTOMIZED REBATE

Reserve funds before the materials are purchased and work has begun. Installation may begin after the project is approved and the reservation is confirmed by Roseville Electric Utility.

- Applicants must contact Roseville Electric Utility account representative (916-79-POWER) to discuss the project.
- Complete and submit **RESERVATION REQUEST – FORM A**, including the **RESERVATION CHECK-LIST**, with required information and documentation outlined from contact with account representative and described on **FORM A**.
- Provide the manufacturer's specification sheets for all proposed new equipment.
- **Submit RESERVATION - FORM A**



### BY EMAIL

Scan Application  
(PDF/Worksheet files):  
elecbizrebates@roseville.ca.us



### BY MAIL

Attention Business Rebates  
Roseville Electric Utility  
2090 Hilltop Circle, Roseville, CA 95747

## STEP 2 - INSTALLATION CONFIRMATION

After the installation is complete:

- Submit any changes in quantity or products from what was reserved on an updated **RESERVATION REQUEST – FORM A**, include supporting documentation for those changes with revised peak load reductions (kW) and annual energy (kWh) savings as necessary to meet reservation requirements.
- Complete, sign and submit **INSTALLATION CONFIRMATION – FORM B** to Roseville Electric Utility.
- Roseville Electric Utility will review custom rebate package and perform necessary audits to verify project compliance for rebates.

## STEP 3 - REQUEST REBATE PAYMENT

After the project installation is complete: (Form B and Form C can be submitted at the same time if no changes have occurred.)

- **Complete, sign and submit PAYMENT REQUEST – FORM C to Roseville Electric Utility.**
- Attach the itemized invoices for products, labor and rebates. The manufacturer name and model number of each item installed must appear on the invoice. If the contractor is receiving the incentive, a credit for the rebate amount shall be on final invoice.
- **Rebate payments will only be paid to the customer of record, the installing contractor or their third party corporate office.** Once approved, rebate payments take approximately 6-8weeks.

## ELIGIBILITY

- The Customized Rebate Program is designed to serve customers that are on the GS-2, GS-3 and GS-4 rate schedules. Non demand customers are not eligible to apply.
- Eligible projects must impact energy use during normal business hours to qualify.

## GENERAL REQUIREMENTS

- Projects accepted under the Customized Rebate Program must utilize new, energy-efficient equipment. Used, reconditioned, re-built or restored equipment does not qualify.
- In no case will the utility pay more than 50% of the actual costs for the project.
- The customer agrees to mandatory pre and post project equipment inspections by Roseville Electric Utility, or their representative, for field verification of baseline and replacement project scope of work as defined by the customer's submittal.
- The customer must provide full documentation on anticipated kW and kWh load reductions as outlined on Form A under 'Supporting Documentation'. Customer may be required to provide pre and post data logging at 15 minute or smaller intervals for measurement and verification (M&V) of actual load reductions. The data must be submitted in a format acceptable to Roseville Electric Utility and/or their representative. **The cost of collecting and submitting the data is the responsibility of the customer.**
- Reservations for funds will be accepted on a first-come first-served basis, until funds are depleted or program is closed.
- The Roseville Electric Utility third party process will determine the actual kWh saved, which is the basis for the final incentive payment.
- Rebate items must be installed at the Roseville Electric Utility account listed on the application.
- Rebate reservations are good for up to 90 days for projects with rebates less than \$20,000 and 120 days for larger than \$20,000.
- Equipment must meet the technical requirements listed in this application. Roseville Electric Utility reserves the right to withhold payment for products that do not meet the requirements. All customers and/or contractors must ensure new equipment is compatible with existing equipment and controls, fits into existing equipment and meets required state and local energy codes.

- Installing contractors must follow proper disposal and recycling procedures with removed materials. Resale of removed equipment is prohibited.
- All installing contractors shall provide active contractor license information and agree to Roseville Electric Utility's Contractor Code of Conduct.

## RESERVATION REQUESTS

- Roseville Electric Utility will review the FORM A - REBATE RESERVATION and documentation for rebate eligibility.
- Customer will receive a 'Customized Incentive Offer' or notice of rejection.
- The 'Customized Incentive Offer' will describe the project documentation requirements for measurement and verification of kW and kWh reductions, incentive reserved for the project, completion deadlines and other relevant terms and conditions specifically tailored to the project.
- Funds reserved may not be final project payment. Rebate payment is based on the final energy (kWh) reduction as identified through the project M&V process.
- Customer must sign and return the 'Customized Incentive Offer' letter to accept the offer. Offers expire 90 days after they are issued.

## EQUIPMENT OR SCOPE OF WORK CHANGES

- Equipment or scope of work changes must be reported to the account representative as soon as possible.
- Re-submittal of the supporting documentation with revised peak load reductions (kW) and annual energy (kWh) savings may be required with full methodology and analysis.

## INSTALLATION COMPLETION

- Customer to contact Roseville Electric Utility account representative at 916-79-POWER to schedule final project inspection.



# FORM A - REBATE RESERVATION CUSTOM REBATE PROGRAM

## CUSTOMER INFORMATION

Business Name	Account Number		
Project Address	City	State	Zip
Contact Name	Contact Title		
Phone	Email		

## INSTALLING CONTRACTOR INFORMATION

Check here if project will be customer installed	Proposed Installation Date	Contractor Name	
Mailing Address	City	State	Zip
Contact Name	Contact Title		
Phone	Email		

## PROJECT INFORMATION

Estimated Start Date	Estimated Completion Date	Gross Square Feet
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## PROJECT TYPE - CHECK ALL THAT APPLY

<input type="checkbox"/> The project is for process loads.
<input type="checkbox"/> Title 24 Energy Compliance is not required on this project.
<input type="checkbox"/> Title 24 Energy Compliance is required on this project. Please submit title 24 energy compliance documents.

FORM A CONTINUES ON NEXT PAGE

**REQUIRED SUPPORTING DOCUMENTATION FOR REBATE CONSIDERATION:**

Provide a written description of the proposed project; a clear understanding of the complete project must be projected in this narrative.

Provide manufacturer's specification of proposed equipment.

Provide a description on changes to operational schemes, shifting loads, lock out of equipment or other scope of work measures that affect peak (kW) load reduction and energy (kWh) savings.

Provide methodology and calculations used for estimated peak (kW) load demands on base case, proposed project and estimated peak (kW) load reduction demand savings.

Provide annual energy (kWh) calculations for both base case and proposed equipment.

Provide estimated project costs. Upon completion of the project, contractors' invoices will be required.

Technical requirements for Customized Rebate Program projects will be specific to each project. The technical requirements for each project will be provided in the Customized Incentive Offer.

Roseville Electric Utility and/or its designated technical consultants reserve the right to request additional supporting documentation as deemed necessary to prepare a Customized Incentive Offer. All customer information will be held in confidence.

Roseville Electric Utility will review the Customized Rebate project request and respond with a written response to the request. **If approved, a 'Customized Incentive Offer' will be sent to the applicant.** This incentive offer must be signed by the applicant and returned to reserve funds. If not approved, the applicant will receive a reason for rejection.

# FORM B - INSTALLATION CONFIRMATION CUSTOM REBATE PROGRAM

## CUSTOMER'S PROJECT INFORMATION

Business Name	Project Address
Customer Contact Name	Project Completion Date

**All projects – Customer to complete and sign section (1)  
Contractor Installed – Contractor to complete and sign section (2)**

### (1) CUSTOMER INSTALLATION

Project Manager (PM)	Customer PM Phone Number	Customer PM Email
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- I certify that the products for which rebates are being requested were installed by company employees, and the installed equipment is working properly.
- The project was completed with **no changes** **changes** from the reservation.  
**Changes require re-submittal of FORM A and required project documentation.**
- I have received the warranty information for products that have been installed.
- Attach a copy of the itemized project invoice, include model numbers of installed equipment.

Customer Signature	Date
Print Name	Phone Number
	Email

### (2) CONTRACTOR INSTALLATION

Contractor Business Name:	Contractor Project Manager Name:
Mailing Address:	
Contractor PM Phone Number:	Contractor PM Email:

#### Contractor Agrees:

- Contractors must comply with the Roseville Electric Utility's Contractor Code of Conduct.
- I certify that employees of, or subcontractors to, the Installing Contractor listed above have installed the products for which rebates are being requested, and the installed equipment is working properly.
- The project was completed with **no changes** **changes** from the reservation.  
**Changes require re-submittal of FORM A and required project documentation.**
- Warranty information for products installed has been provided to the customer.
- Attach a copy of the itemized project invoice, include model numbers of installed equipment.

Contractor Signature	Date
Print Name	Phone Number
	Email



# FORM C - PAYMENT REQUEST FORM CUSTOM REBATE PROGRAM

## CUSTOMER INFORMATION

Business Name	Project Address
Customer Contact Name	Project Completion Date

### Customer to check all that apply:

- A copy of the project itemized invoice is attached.
- The equipment on this project was installed and is operating satisfactorily.
- I received warranty information from the contractor for each of the products installed on this project.
- I have the contractor's contact information for warranty questions or issues.
- I am satisfied with the results from this project.

### Rebate Payment Instructions (select one):

- Send check to customer installation address, information provided on **RESERVATION REQUEST - FORM A.**
- Send check to a different customer location or property management firm:

Company Name	Customer Project Reference		
Mailing Address	City	State	Zip

Send check to the **INSTALLING CONTRACTOR**, information provided on **INSTALLATION CONFIRMATION – FORM B.** Contractor invoice must show total cost of project without rebates, rebate amount, permit fees and net balance due from customer. This option is only available when contractors install the items being rebated. Payments shall only be sent to the **INSTALLING CONTRACTOR**, the **CUSTOMER OF RECORD** or their third party corporate office.

### TERMS AND CONDITIONS

I have read and understand the program requirements set forth in these application forms and agree to abide by these requirements. I have attached the required documentation for the program under which I am applying. I certify that the information provided on this application and associated required documentation is true and correct.

As a qualified Roseville Electric Utility customer, I certify that I purchased and installed the indicated energy-saving products for use in my business facility and not for resale, and that all equipment installed is new, not rebuilt, re-manufactured or used equipment. I agree to participate in project evaluation surveys conducted in person, by phone or in writing and to mandatory project inspections by Roseville Electric Utility and/or their designees for installed efficiency measures verification and evaluation.

Additionally, as a program participant I agree to allow Roseville Electric Utility to release my company business name and my contact name as a Roseville Electric Utility business customer that has benefited from receiving rebate funds for energy efficiency improvements.

I agree that the selection, purchase, and ownership of the equipment are my sole responsibility. Roseville Electric Utility makes no representation as to the safety, reliability and /or efficiency of the equipment selected or components selected to meet the programs intent.

I agree that if I cease to be a distribution customer of Roseville Electric Utility, or I do not provide Roseville Electric Utility with 100% of the related energy benefits for the life of the product or for a period of five (5) years from receipt of rebate, whichever comes first, I shall refund a prorated amount of the rebate dollars to Roseville Electric Utility.

Tax Liability—you are urged to consult your tax advisor concerning the tax-ability of rebates. Roseville Electric Utility is not responsible for any taxes that may be imposed on your business as a result of your receipt of this rebate.

I certify that Roseville Electric Utility's rebate influenced the purchase of a higher efficiency product than I otherwise would have purchased.

Customer Signature	Date
Print Name	Phone Number
	Email