

ENERGY EFFICIENCY PARTNERING ("EEP") APPLICATION PROCESS AND INSTRUCTIONS

This Microsoft Excel workbook serves as the "Energy Efficiency Partnering (EEP) Program Application." The workbook will estimate a preliminary EEP rebate based upon the data you provide. This is only an estimate. The actual program funds are not calculated or reserved at this step in the application process. Please first read the "Program Rules" and read the application instructions below before beginning your application. If you require any assistance during the application process, please contact your PWP Account Manager at (626) 744-6970, email the EEP Program Support at PWP_CEE@cityofpasadena.net

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Step 1 Customer/Vendor prepares and submits EEP Rebate Application

- **A.** Download the current version of the EEP Rebate Application from PWP's website at www.PWPweb.com/EEP
- **B.** Save this Excel application to your computer hard drive, then click on the link "**Start Application**" below. Do not make any changes, additions or deletions to the application form other than populating the requested data fields.
- **C.** Fill out all of the fields in the "**Customer Vendor Project Type**" form. Under "PROJECT TYPE" select the appropriate type of equipment you are retrofitting, either "Mechanical" or "Lighting."
- **D.** Enter data about your project in the applicable form and **be sure to save the document periodically** to prevent data loss.

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- 1. For Mechanical Projects: Complete the requested information and the appropriate "Third Party Analysis Form" for your project type. If you choose to provide data on the kWh and kW estimated savings and total project cost, a preliminary rebate estimate will be calculated automatically based on the current incentive rate and will appear at the bottom of the "Rebate Estimate" form. Ultimately PWP's third party savings analysis will be the basis for the final rebate amount.
- 2. For Exit Signs and Lighting Projects: Complete either the "Lighting Installation" or "Exit Signs" form and be sure to provide all requested data on pre- and post-installation conditions and project costs. (The "lumen" column is optional and provided for the customer's benefit.) For lighting projects with sensors, please indicate the total amount of sensors. When the lighting or exit sign form is complete, click on the "Lighting Totals & Rebate Estimate" link at the top to see your estimated rebate. (Note: PWP will conduct a pre- and post-inspection to confirm all project data, the proper incentive rate and calculate the final rebate amount. See Steps 3,5,6,7,8, and 9.)
- E. Save the application and email it as an attachment to your Account Manager or to the EEP Program email at PWP_CEE@cityofpasadena.net. Please put "EEP Rebate Application" in the subject line to be given priority status. Attach an electronic copy of the signed project proposal by the customer. For lighting projects please provide a copy of the cut sheets for the lamps and ballast.

Step 2: PWP provides customer with a "Receipt of Application" form.

Receipt of Application: The "Receipt of Application" form will be sent to the customer for signature once the completed application has been received and reviewed. Customer should read, sign and return the form to PWP promptly.

Step 3: Pre-inspection is requested by customer

When you receive Receipt of Application form from PWP, contact your Account Manager or call (626) 744-6970 to schedule a pre-inspection before equipment removal and project work begins. Removal of any existing equipment prior to PWP's pre-inspection will disqualify the EEP Application and PWP will not reserve any program funds for the project.

Step 4: Savings and rebate calculations are completed

Once the pre-inspection is completed, PWP's designated third party consultant will conduct an engineering analysis on the project to determine the eligible energy and demand savings on which the final rebate amount will be calculated.

Step 5: PWP Issues Rebate Confirmation Letter

Once PWP has received and reviewed the project savings analysis from its consultant, PWP will provide the customer with a signed "Rebate Reservation Confirmation" letter.

 The Rebate Reservation Confirmation letter will state the eligible energy and demand savings and the rebate amount being reserved, subject to PWP's postinspection.

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 Program funds for the EEP eligible project will be reserved for up to six months from the date on the Rebate Reservation Confirmation letter.

Step 6: Project is installed and completed

Customer may commence project work after receiving the Rebate Confirmation Letter.

- The EEP rebate will be limited to the amount shown on the EEP Rebate Reservation Confirmation.
- If customer wishes to increase the scope of a project and receive a larger rebate, a new EEP Rebate Application must be submitted, using the current version posted on PWP's website.

Step 7: Customer Schedules Post Inspection

As soon as the project is complete, contact your Account Manager or call (626) 744-6970 to request a post-inspection. If PWP's post-inspection determines there were substantial changes to the project, either 1) a new project engineering analysis will be required at the customer's expense, or 2) the EEP Application will be denied and the program funds reservation will be cancelled.

Step 8: Customer completes and sends PWP final paperwork.

After PWP's post-inspection, send a copy of the paid invoice(s) from your vendor, contractor or installer to your Account Manager or the EEP Program Manager. If the project was self-installed, provide a copy of the paid equipment invoice(s) and an estimate of installation labor cost printed on company letterhead.

Step 9: Rebate payment

- **A.** Rebate check requests are normally processed within 6-8 weeks; however, It may take longer based on the amount of program requests being processed.
- **B.** EEP rebate checks will be issued by the City of Pasadena and made payable to the PWP electric customer on record, unless the customer assigns the rebate payment to a third party and will be delivered by mail. Customer rebate recipients may be subject to receiving a 1099.
- **C.** EEP Rebate Reassignment:
 - The customer has the right to assign the rebate payment to a third party and must request an "EEP Rebate Reassignment" form from their Account Manager or the EEP Program Manager after the customer receives the "EEP Rebate Reservation Confirmation Letter."
 - An authorized company representative must sign the "EEP Rebate Reassignment" form and return it to your Account Manager along with the representative's business card and letter of authorization on company letterhead.
 - 3. PWP reserves the right to verify the company authorization of the individual who signs all forms related to the application.
 - Assigned vendor/third party rebate recipients may be subject to receiving a 1099.

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