



*Omaha Public Power District*

# BUSINESS REBATES

## 2025 TRADE ALLY TRAINING MANUAL

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**If the information in this document does not match what is in the Program Terms & Conditions, the [Program Terms & Conditions](#) will be the correct version to follow.**

## Trade Ally & Business Rebate Overview

Trade Allies play a pivotal role in the success of utility energy programs. Across the country, utility companies offer cash incentives or rebates to encourage customers to adopt energy-saving solutions. These companies have established extensive networks to promote energy efficiency.

Businesses benefit from the partnership between OPPD and Trade Allies by gaining increased appeal for energy-efficient equipment. Moreover, the cost barriers are lowered due to these incentives, making energy-saving solutions more affordable for customers. It's a win-win situation that fosters sustainability and economic benefits.

OPPD (Omaha Public Power District) is one of many utilities with a Trade Ally network, actively implementing energy solutions within its territory. Trade Allies play a vital role and are integral to OPPD's mission by participating in the Business Rebate program.

A prescriptive or business rebate is an incentive offered by OPPD and utility companies to encourage energy-efficient upgrades. When customers make specific improvements (such as replacing traditional bulbs with LEDs), they become eligible for fixed-dollar rebates.

In June 2024, the prescriptive rebate program at OPPD was updated to Business Rebates. Throughout this manual and training program, all prescriptive rebates will be referred to as **OPPD's Business Rebates Program**.



## Trade Ally Tiers & Requirements

To be eligible to participate in OPPD's Business Rebate program, Trade Allies must complete the required training and sign the application. There are three tiers of Trade Allies, each with its own requirements and benefits. Let's take a moment to review.

### Trade Ally Tiers

1. Trade Ally
2. Silver Trade Ally
3. Gold Trade Ally

### Basic Requirements for All Trade Allies

1. Complete all training modules, and pass the final assessment with an 80% or higher passing grade to receive Trade Ally status
2. Complete and sign the Trade Ally (TA) Application to retain status is by January 1<sup>st</sup> of each year
3. Complete a Request for Information (RFI) for Custom Rebate participation. Note: This will only need to be completed once and not annually
4. Provide no cost, no obligation proposals to OPPD customers (exceptions for Custom projects, and other projects that require Energy Studies, such as, Building Management Systems and Retro-Commissioning) Apply for Business Rebates that would be completed
5. Complete Applications correctly and completely
6. Periodically review Trade Ally Hub (Central)

### Silver Trade Ally Requirements

1. Complete the Trade Ally Basic Requirements.
2. Complete a minimum of 10 projects that achieve "Application Completed" status during the previous calendar year.
3. Have a storefront or home office in the OPPD service territory.
4. Be an OPPD customer.

5. Have a proven track record of understanding the Business Rebate programs and of completing the entire application process without assistance.
6. Have an 80% application approval rate from the first review by OPPD.

### **Gold Trade Ally Requirements**

1. Complete the Trade Ally Basic Requirements.
2. Complete a minimum of 20 projects that achieve "Application Completed" status during the previous calendar year.
3. Have a storefront or home office in the OPPD service territory.
4. Be an OPPD customer.
5. Have a proven track record of understanding the Business Rebate programs and of completing the entire application process without assistance.
6. Have an 80% application approval rate from the first review by OPPD.
7. Provide a written commitment to offer free, no-obligation audits and proposals to all OPPD customers upon request (exceptions for Custom projects and other projects that require Energy Studies, such as Building Management Systems and Retro-Commissioning). While this is already agreed to in the annual Trade Ally agreement, this is a confirmation of the agreement due to the lack of promotion in the past.



## **Trade Ally Benefits**

### **Basic Benefits for All Trade Allies**

1. Included on the OPPD website Trade Ally list
2. Free Annual Trade Ally Summit
3. Able to apply for rebates for business customers
4. Marketing materials

### **Silver Trade Ally Benefits**

1. Trade Ally Basic Benefits
2. 1.5% rebate incentive for organization\*

*\*Rebate incentive is based applications that go into "application completed" status (paid), from Jan 1 through Sept 30 of the present calendar year or are in Payment Processing Status as of September 30 of the present calendar year. Check issues to the Trade Ally Organization and awarded at the Annual Summit.*

### **Gold Trade Ally Benefits**

- Trade Ally Basic Benefits
- Lead generation provided by OPPD
- Advisory Group Seat
- 3% rebate incentive for each application

*\*Rebate incentive is based applications that go into "application completed" status (paid), from Jan 1 through Sept 30 of the present calendar year or are in Payment Processing Status as of September 30 of the present calendar year. Check issues to the Trade Ally Organization and awarded at the Annual Summit.*

Note: Previous year performance is the combination of all individuals for an organization combined. It is the company not the individual that will be recognized in each tier. Trade allies play a pivotal role in the success of utility energy programs. Across the country, utility companies offer cash incentives or rebates to encourage customers to adopt energy-saving solutions. These companies have established extensive trade ally networks to promote energy efficiency.



## Available Rebates

Rebates	Description
<a href="#">Lighting and Lighting Controls</a>	<p>The OPPD Lighting and Controls Business Rebate program helps businesses reduce energy costs by offering rebates for upgrading to energy-efficient LED lighting and advanced control systems. These upgrades not only lower energy consumption but also contribute to sustainability by reducing carbon footprints. Businesses can earn significant rebates, potentially covering up to \$100,000, which supports the implementation of these efficient solutions. Additionally, these energy-efficient lighting systems require less maintenance and have a longer lifespan, translating to further cost savings over time.</p>
<a href="#">Heating, Ventilation &amp; Air Conditioning (HVAC)</a>	<p>The OPPD's HVAC, Split, Chiller, and Heat Pumps Business Rebate program offers financial incentives for businesses to upgrade their heating, ventilation, air conditioning, and cooling systems to more energy efficient models. By implementing these upgrades, businesses can significantly reduce their energy consumption and operational costs. The program supports a variety of energy efficient HVAC solutions, including high-efficiency split systems, chillers, and heat pumps, helping businesses improve their energy performance and sustainability while benefiting from substantial rebates.</p>
<a href="#">Advanced Rooftop Unit Controller (ARC)</a>	<p>The OPPD Advanced Rooftop Unit Controller Business Rebate program provides financial incentives for businesses to upgrade their rooftop HVAC units to advanced, energy-efficient controllers. These upgrades help reduce energy consumption and operational costs, while also improving the overall performance and reliability of the HVAC system. By participating in this program, businesses can earn rebates that support the implementation of these efficient solutions, contributing to both cost savings and environmental sustainability.</p>
<a href="#">Custom</a>	<p>The OPPD Custom Project Business Rebate program provides financial incentives for businesses to implement tailored energy efficiency projects that are uniquely suited to their operations. By identifying specific energy-saving opportunities and optimizing systems such as control systems, compressed air, and motors, businesses can achieve significant reductions in energy consumption and costs. The program supports these custom projects with rebates, offering \$500 for every kilowatt (kW) of peak demand reduction.</p>
<a href="#">Building Management Systems (BMS)</a>  <a href="#">Small Building Management Systems (SBMS)</a>	<p>OPPD's Building Management Business Rebate program offers financial incentives for businesses to adopt advanced building management systems (BMS). These systems help monitor and control building operations, such as heating, ventilation, air conditioning, and lighting. By implementing a BMS, businesses can improve energy efficiency, reduce operational costs, and enhance overall building performance.</p>
<a href="#">Retro-Commissioning</a>	<p>OPPD's Retro-commissioning Rebate program offers incentives for businesses to optimize the performance of their existing building systems. By evaluating and fine-tuning HVAC, lighting, and other systems, businesses can improve energy efficiency and reduce operational costs.</p>
<a href="#">Small-to-Medium Business (SMB) Direct Install</a>	<p>The Small to Medium Business (SMB) Direct Install Program offers rebates on installation labor costs for energy-efficient upgrades, based on the recommendations made by the energy auditor during the free walk-through energy assessment.</p>
<b>ENERGY STAR® Projects</b> <ol style="list-style-type: none"> <li>1. <a href="#">Portfolio Manager Benchmarking</a></li> <li>2. <a href="#">Certification</a></li> <li>3. <a href="#">Building</a></li> </ol>	<p>Energy Efficient upgrades to Lighting, HVAC, Window, Insulation, ENERGY STAR certification helps ensure that products and buildings operate efficiently, saving energy and reducing environmental impacts.</p>
<a href="#">Energy Study</a>	<p>The OPPD Energy Study Business Rebate program offers incentives for businesses to conduct comprehensive energy studies to identify potential energy-saving opportunities. These studies analyze current energy usage and propose tailored solutions to enhance energy efficiency. By participating, businesses can receive financial support for the cost of the study, helping them uncover actionable insights to reduce energy consumption and operational costs, while also contributing to environmental sustainability.</p>

## Business Rebate Program Eligibility and Qualifications

Participants must be OPPD business customers 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 reserves the right to limit rebates on any building or project to ensure that kW and kWh results are not counted twice.

## Rebate Project Requirements

- Projects receiving rebates of less than \$5,000 should be completed before applying for any rebate and must be applied for within 120 days of the invoice date.
- Rebates must be \$100 or greater to qualify.
- The maximum rebate amount will be \$100,000 per facility per calendar year (there may be more than one project for a facility provided the calendar year total is less than \$100,000). Specific project rebate limits are shown in the Project Requirements.
- OPPD reserves the right to limit any prescriptive equipment rebate (HVAC, ARC, and Lighting) payment to not exceed 50% of the total material/equipment cost for the project.

## Rebate Pre-Approvals Guidelines

### Pre-Approval v No Pre-Approval Rebates

Pre-approval must be completed before ordering any material or starting any work at the project site, including demolition work. This protects the OPPD customer and ensures that funding has been set aside and the project meets program requirements.

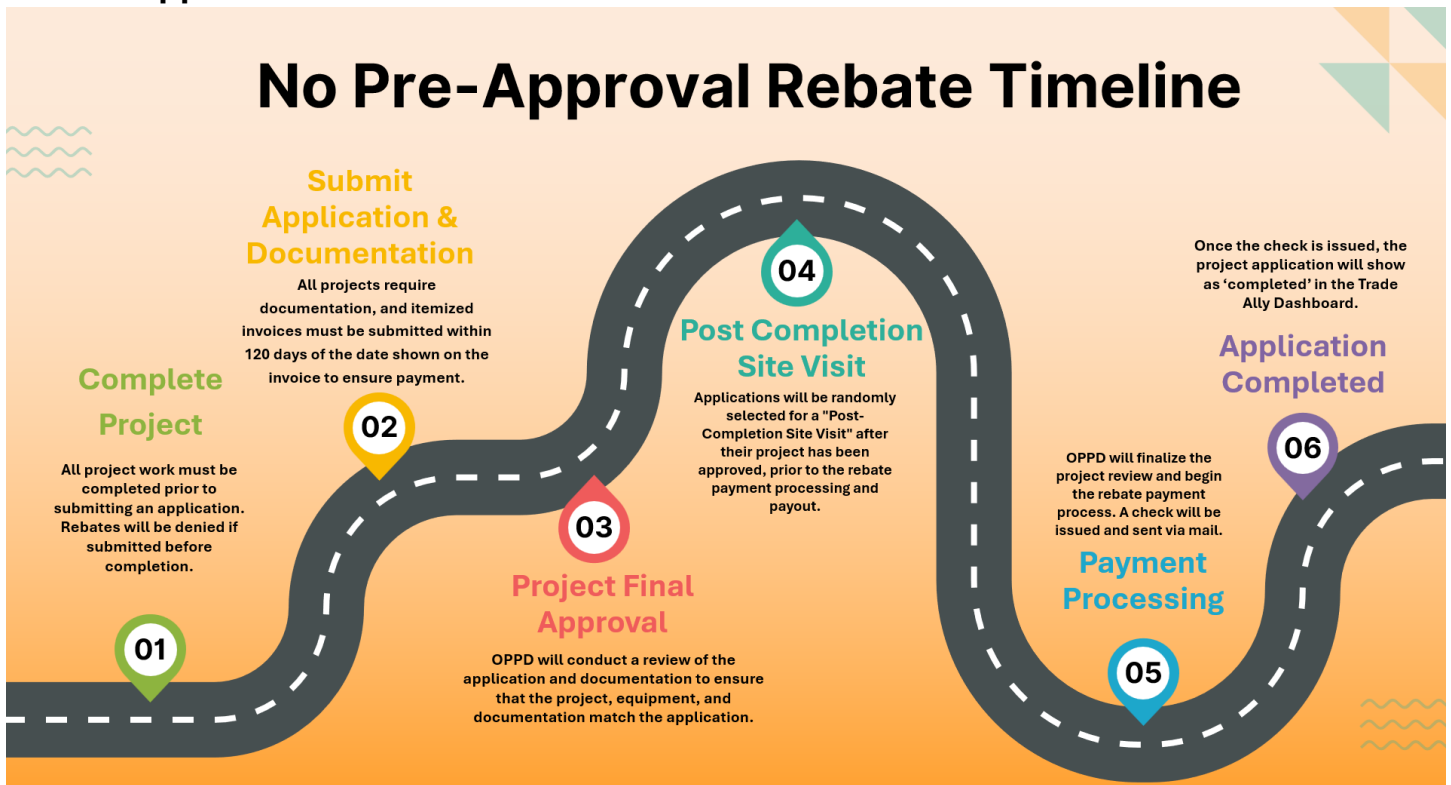
There are 2 primary criteria to determine if the project requires Pre-Approval:

1. Type of Project
2. Cost of project (over or under \$5,000)

<b>No Pre-Approval (NPA) Rebates:</b> Dependent on: Type of project & \$ amount ( <b>less than \$5000</b> )	<b>Pre-Approval (PA) Rebates:</b> Dependent on: Type of project & \$ amount ( <b>\$5,000 or more</b> )
<a href="#">Lighting and Lighting Controls</a>	<a href="#">Lighting and Lighting Controls</a>
<a href="#">HVAC (Heat Pump, Chiller, Split, RTUs)</a>	<a href="#">HVAC (Heat Pump, Chiller, Split, RTUs)</a>
<a href="#">Advanced Rooftop Unit Controller (ARC)</a>	<a href="#">Advanced Rooftop Unit Controller (ARC)</a>
<a href="#">Small Business Building Management System (SBMS)</a>	<a href="#">Small Business Building Management System (SBMS)</a>
<a href="#">Building Management System (BMS)</a>	<a href="#">Building Management System (BMS)</a>
<a href="#">Building Retro-Commissioning</a>	<a href="#">Building Retro-Commissioning</a>

<b>No Pre-Approval (NPA) Rebates:</b> No Pre-Approval Regardless of Cost	<b>Pre-Approval (PA) Rebates:</b> Require Pre-Approval Regardless of Cost
<a href="#">Energy Study</a>	<a href="#">CUSTOM</a>
<a href="#">ENERGY STAR Portfolio Manager Benchmarking</a>	
<a href="#">ENERGY STAR Certification</a>	
<a href="#">ENERGY STAR Building</a>	
<a href="#">Small to Medium Business (SMB) Direct Install</a>	

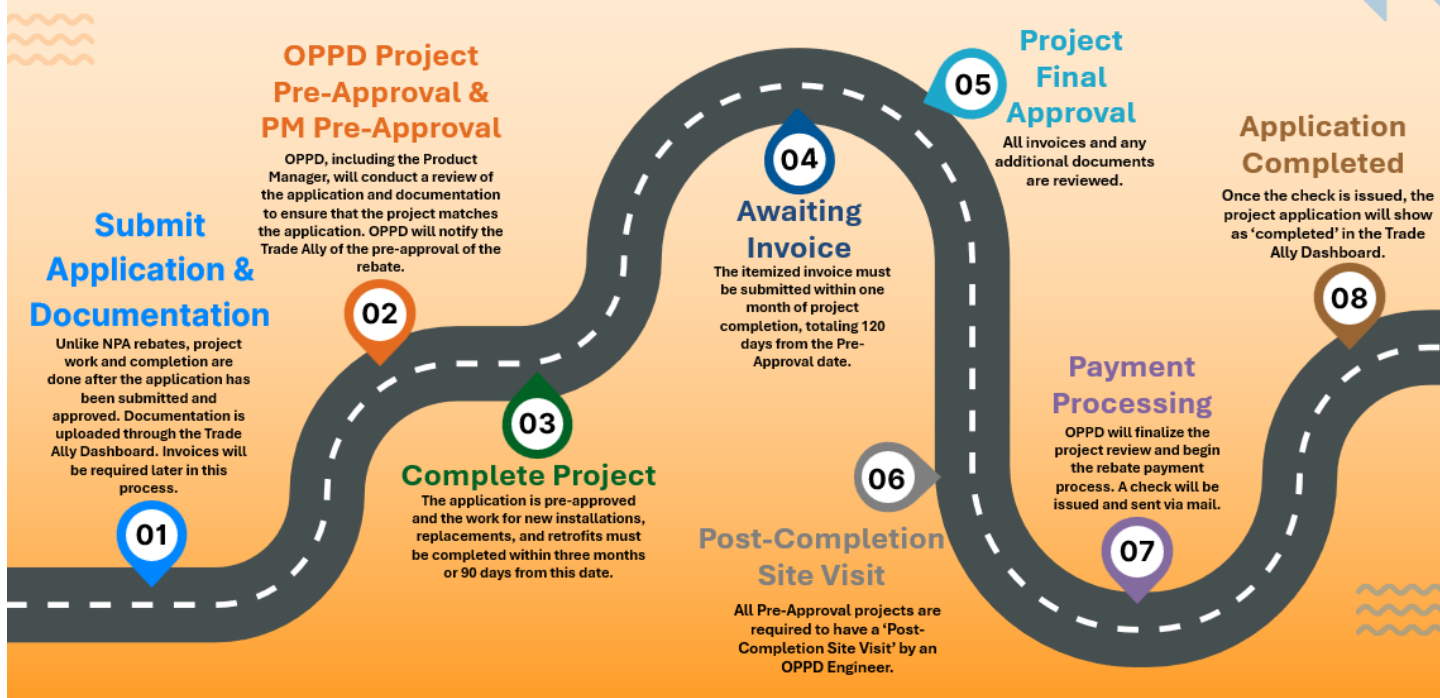
## Rebate Application Workflows & Timelines



## No Pre-Approval (NPA) Project Business Rebate Workflow

- 1. Complete Project:**  
All projects must be complete prior to submitting the application. Applications will be denied if submitted prior to completion.
- 2. Submit Application & Documentation:**  
All projects require documentation, and itemized invoices must be submitted within 120 days of the date shown on the invoice to ensure payment.
- 3. Project Final Approval:**  
OPPD will review the application and documentation to ensure that the project, equipment, and documentation match the application.
- 4. Post Completion Site Visit:**  
No Pre-Approval (NPA) rebate projects are randomly selected for a "Post Completion Site Visit" after their project has been approved and completed.
- 5. Payment Processing:**  
If all information is correct, OPPD will approve and finalize the project and begin the rebate payment process. A check will be issued and sent via mail.
- 6. Application Completed:**  
Once the check is issued, the project application will show as 'completed' in the Trade Ally Dashboard.

# Pre-Approval (PA) Rebate Timeline



## Pre-Approval (PA) Project Business Rebate Workflow

- 1. Submit Application & Documentation:**  
Unlike NPA projects, project work and completion are done after the application has been submitted and pre-approved. Documentation is uploaded through the Trade Ally Dashboard. Invoices will be required later in this process.
- 2. OPPD conducts Internal Review:**  
OPPD, including the Product Manager, will review the application and documentation to ensure that the project matches the application. OPPD will notify the Trade Ally of pre-approval of the project.
- 3. Project Pre-Approval:**  
The application/project is pre-approved and directed to complete the work for new, replacement, and retrofits within 3 months or 90 days from this date.
- 4. Complete Project:**  
The application/project is pre-approved and directed to complete the work for new, replacement, and retrofits within 3 months or 90 days from this date.
- 5. Awaiting Invoice:**  
The itemized invoice must arrive within one month of project completion. Total time of 120 days from pre-approval.
- 6. Project Final Approval:**  
During this status, all invoices and any additional documents are reviewed. Messages will be left on the application if there are outstanding questions to be addressed before the application can move forward, or the application may be denied.
- 7. Post Completion Site Visit:**  
All pre-approval projects are required to have a "post-completion site visit" by an OPPD Engineer.
- 8. Payment Processing & Rebate Payout:**  
OPPD will finalize the project review and begin the rebate payment process. A check will be issued and sent via mail.
- 9. Application Completed:**  
Once the check is issued, the project application will show as 'completed' in the Trade Ally Dashboard.



## Application Timelines

### Rebates less than \$5000

Project work should be completed before applying for any rebate and must be applied for within 120 days of the invoice date. Invoices are submitted at the time of application.

## NO PRE-APPROVAL TIMELINE

BUSINESS REBATES: \$4,999 OR LESS



### Rebates \$5,000 or more

Project completion shall be within three (3) months of OPPD pre-approval, and the invoice must arrive within one (1) month of completion for rebate funding to be available. Any invoice arriving over 120 days from pre-approval may no longer be funded.

## PRE-APPROVAL TIMELINE

BUSINESS REBATES: \$5,000 OR MORE



You'll be notified via email to remind of the funds' expiration; if an extension is needed, you must notify OPPD and have an extension approved for rebate funds to remain reserved. After the 121st day from the preapproval, funds will no longer be reserved, and the project will need to be resubmitted and approved to ensure funding.

## Application Statuses

### Apply to All Rebates

<b>Duplicate</b>	A rebate has already been applied for at this premise. If you see an application, go into this status after you submit it, immediately leave a message further describing the project and/or letting OPPD know this is not a duplicate project. If the project is actually a duplicate, it will be denied ensuring that rebates are not collected more than once for the same project.
<b>Admin Hold</b>	There is an administrative issue that needs to be addressed before the application can be reviewed or processed. OPPD will manage any needed follow up to move the application out of this status. The application may not be able to be moved out of this status and would then be denied.
<b>Application Denied</b>	The application has been denied. An email documenting the denial reason will be sent automatically to the PREMISE CONTACT and the CONTRACTOR as entered on the application. A copy of the denial email will also be available on the dashboard within the application in the documents section. An application can be denied from Duplicate, Admin Hold, Project Pre-Approval, Project Final Approval, Post Completion Site Visit or Payment Processing status. A message explaining the denial may also be added to the messages section of the application.

### No Pre-Approval (NPA) Rebates less than \$5,000

<b>Project Final Approval</b>	This will be the first status for all rebates that are less than \$5,000 or less or do not require a pre-approval. During this status each application and all uploads are reviewed. Messages will be left on the application if there are outstanding questions, or the application may be denied.
<b>Post Completion Site Visit</b>	The project has been selected for a post project completion site visit. Expect a call from OPPD to set the site visit. OPPD will be calling the PREMISE CONTACT to set this visit. The faster the site visit occurs the faster the rebate is paid. Please work with us to expedite site visits.
<b>Payment Processing</b>	The payment is being reviewed for final approval and will then start the payment process. In some instances, an application may be denied in this status. Check the messages section on the application or leave notes in that section if you have questions.
<b>Application Completed</b>	The payment has been sent and the application has been completed within the system.

### No Pre-Approval (PA) Rebates \$5,000 or more

<b>Project Pre-Approval</b>	During this status all applications and documents are reviewed. Messages will be left on the application if there are outstanding questions to be addressed before the application can move forward, or the application may be denied.
<b>Product Manager (PM) Pre-Approval</b>	During this status each application is further reviewed and if approved the Pre-Approval email will be generated, and the application will go into AWAITING INVOICE status. Messages will be left on the application if there are outstanding questions to be addressed before the application can move forward, or the application may be denied.
<b>Awaiting Invoice</b>	The application/project has been pre-approved and is waiting for the invoice and any other required documentation to be uploaded. This status is active for 120 days if the invoice and any other required documentation has not been uploaded the application will automatically go into DENIED status. If the invoice and any other required documentation cannot be uploaded by the deadline, please reach out to OPPD to discuss an extension.
<b>Project Final Approval</b>	During this status all invoices and any additional documents are reviewed. Messages will be left on the application if there are outstanding questions to be addressed before the application can move forward, or the application may be denied.
<b>Post Completion Site Visit</b>	The project has been selected for a post project completion site visit. Expect a call from OPPD to set the site visit. OPPD will be calling the PREMISE CONTACT to set this visit. The faster the site visit occurs the faster the rebate is paid. Please work with us to expedite site visits. NOTE: All rebates \$5,000 or more require a post completion site visit be completed prior to any rebate being approved.
<b>Payment Processing</b>	In some instances, an application may be denied in this status. Check the messages section on the application or leave notes in that section if you have questions.
<b>Application Completed</b>	The payment has been sent and the application has been completed within the system.

# REBATE PROGRAM REQUIREMENTS AND TERMS & CONDITIONS

## General Terms & 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 and/or project 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.

## Tax Credits

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

## Nebraska Department of Environment & Energy (NDEE)

Consult NDEE regarding their low interest 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 manufacturer, 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.

# LIGHTING & LIGHTING CONTROLS REBATES

## Lighting & Lighting Controls: Project Requirements, Terms & Conditions & Required Documentation

[Rebate Combinations](#)

[Pre-Approval Requirements](#)

[Eligible Equipment](#)

[Rebate Amounts](#)

[Project Requirements](#)

[Application Equipment Fields](#)

[Required Documentation](#)

### Rebate Combinations

The following rebates CAN be combined with Lighting & Lighting Controls Business Rebate projects:	The following CAN NOT be combined with Lighting & Lighting Controls Business Rebate projects:
ENERGY STAR® Portfolio Manager Benchmarking ENERGY STAR® Certification HVAC (RTUs, Heat Pumps, Split, Chillers) Advanced Rooftop Unit Controller (ARC) Small to Medium Business (SMB) Direct Install	Small Building Management Systems (BMS) Building Management System (BMS) Retro-Commissioning ENERGY STAR® Building Custom Energy Study
Rebate Amounts	Project Requirements
Rebate Minimum: \$100 Rebate Maximum: \$100,000	Building Sq/Ft: N/A Minimum Conditioned: N/A Minimum Conditioned %: N/A Rebate Per Sq/Ft: N/A Project Cost %: N/A Further Defined: N/A Frequency in Years: Varies

### Pre-Approval Requirements

- Only for Projects \$5,000 or more

### Eligible Equipment

- Lighting Fixtures
- LED Bulbs
- Lighting Controls
- LED Retrofit Kit
- Sensors

### Rebate Amounts

Lighting Rebates		
Existing Lighting	New Lighting	Rebate
<b>Non-LED Exit Sign</b>	<b>LED Exit Sign</b>	<b>\$ 5.00</b>
25 Watt Incandescent	LED Lamp	\$ 2.00
30W to <40W Incandescent		\$ 2.00
40W to <50W Incandescent		\$ 3.00
50W to <60W Incandescent		\$ 3.00
60W to <70W Incandescent		\$ 3.00
70W to <80W Incandescent		\$ 3.00
80W to <90W Incandescent		\$ 3.00
90W to 100W Incandescent		\$ 4.00

100W to 120W Incandescent		\$ 4.00
150 Watt Incandescent		\$ 4.00
200 Watt Incandescent		\$ 4.00
13 Watt CFL (approx.)		\$ 3.00
26 Watt CFL (approx.)		\$ 3.00
32 Watt CFL (approx.)		\$ 3.00
42 Watt CFL (approx.)		\$ 3.00
F54T5HO		\$ 6.00
F17T8		\$ 3.00
PL40 Biax		\$ 3.00
F32T8		\$ 3.00
F32T8 U Bend		\$ 3.00
F40T12		\$ 3.00
F40T12 U Bend		\$ 3.00
F96T12		\$ 3.00
F96T12HO		\$ 12.00
600 to 1000 Watt HI D		\$ 80.00
320 to 400 Watt HI D		\$ 60.00
150 to 250 Watt HI D		\$ 30.00
<150 Watt HI D		\$ 25.00
<b>Fluorescent Case Lighting</b>	<b>LED Light Strip (per strip)</b>	<b>\$ 18.00</b>
4 foot 4 Lamp T8 or T12	LED Retrofit Kit or Fixture	\$ 15.00
4 foot 3 Lamp T8 or T12		\$ 15.00
4 foot 2 Lamp T8 or T12		\$ 8.00
4 foot 1 Lamp T8 or T12		\$ 8.00
2X2 T8		\$ 8.00
2X2 T12		\$ 8.00
8 foot 1 Lamp T12 Slimline		\$ 8.00
8 foot 2 Lamp T12 Slimline		\$ 12.00
8 foot 2 Lamp T12 HO		\$ 15.00
600 to 1000 Watt HI D		\$ 80.00
320 to 400 Watt HI D		\$ 60.00
150 to 250 Watt HI D		\$ 30.00
<150 Watt HI D		\$ 25.00

### Controls Rebates

Occupancy Sensor (must control a minimum of three fixtures)	\$ 25.00
Daylight Harvesting Sensor/Ballast	\$ 30.00
Embedded Fixture Controls	\$ 11.00

### Unlisted Lighting/Other Rebates

Existing Lighting	New Lighting	Rebate
HID	LED Lamp	\$ 0.05
Incandescent	LED Retrofit Kit	\$ 0.05
Linear Fluorescents	LED Fixture	\$ 0.05
Other	Other*	\$ 0.05

\*Unlisted items qualify for a rebate of \$.05 per watt difference/reduced as shown on Trade Ally-provided product sheet(s)

## Project Requirements

1. An unlisted lighting rebate cannot be used if a prescriptive lighting option is listed under Lighting Configurations.
2. All LED lamps and fixtures must be currently listed as qualified by ENERGY STAR, or the Design Lights Consortium (DLC).
3. Replaced equipment must be removed from service with any and all hazardous waste components recycled.
4. Equipment must be installed and operating prior to submission of an invoice to OPPD.
5. Parking garage<sup>2</sup> projects are considered interior lighting.
6. Post installation light levels are expected to meet current IESNA recommendations and comply with all applicable electrical, safety and energy codes.
7. Lighting rebates are for existing buildings only. New construction projects and projects that require current energy code compliance standards do not qualify.
8. Replacements are one for one unless specified and preapproved by OPPD<sup>3</sup>.
9. LED refrigerated reach-in case lighting requires that existing linear fluorescent lighting be completely removed, which includes fluorescent end connectors and ballasts.
10. An Occupancy Sensor rebate CANNOT be combined with a Daylight Harvesting Sensor rebate OR an Embedded Fixture Control rebate.
11. 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 Lighting Controls rebate. Daylight Harvesting Sensors CANNOT be combined with an Occupancy Sensor OR an Embedded Fixture Control rebate.
12. 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 Lighting Controls rebate. Lamps with embedded control and digitally adjustable fixtures must be DLC approved in order to qualify. Embedded Fixture Controls CANNOT be combined with an Occupancy Sensor or with a Daylight Harvesting Sensor rebate. Embedded Fixture Control must be programmed for energy efficiency in order to qualify for a rebate.
13. Embedded Fixture control rebate cannot be combined with lamp retrofits of 100 watts or less.
14. Project completion for all rebates over \$5,000 shall be within three (3) months of OPPD preapproval and invoice must arrive within one (1) month of completion in order for rebate funding to be available. Any invoice arriving over 120 days from preapproval may no longer be funded.
15. Once the project over \$5,000 is complete, a dated and itemized invoice with quantity, manufacturer, model number and cost for each piece of equipment must be submitted within 30 days of invoice date in order to receive a rebate payment. Labor does not have to be itemized on a per piece of equipment basis.
16. Lighting rebate limit per building per calendar year is \$100,000

<sup>2</sup> 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.

<sup>3</sup> 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 custom rebate is preapproved by OPPD.

## Application Equipment Fields

Controls	General Lighting	Unlisted or Custom Lighting
<b>Daylight Harvesting Ballast &amp; Embedded Fixture Controls</b> QUANTITY INTERIOR OR EXTERIOR LIGHTING  <b>Embedded Fixture Controls</b> QUANTITY INTERIOR OR EXTERIOR LIGHTING  <b>Occupancy Sensor</b> QUANTITY INTERIOR OR EXTERIOR LIGHTING	<b>LED Exit Sign</b> QUANTITY EXISTING FIXTURE NON LED EXIT SIGN KWH RATE (CAN BE UPDATED, BUT NOT REQUIRED) INTERIOR OR EXTERIOR LIGHTING  <b>LED Lamp</b> QUANTITY EXISTING FIXTURE KWH RATE (CAN BE UPDATED, BUT NOT REQUIRED) INTERIOR OR EXTERIOR LIGHTING <b>LED Light Strip (per strip)</b> QUANTITY	<b>Unlisted or Custom Lighting</b> <b>Application - Other</b> NEW QUANTITY NEW FIXTURE LED LAMP LED RETROFIT KIT NEW LED FIXTURE OTHER EXISTING FIXTURE LINEAR FLUORESCENTS HIGH INTENSITY DISCHARGE INCADESCENT OTHER KWH RATE (CAN BE UPDATED, BUT NOT REQUIRED)

	<p>EXISTING FIXTURE  FLUORESCENT CASE LIGHTING  KWH RATE (CAN BE UPDATED, BUT NOT REQUIRED)  INTERIOR OR EXTERIOR LIGHTING</p> <p><b>LED retrofit Kit</b>  QUANTITY  EXISTING FIXTURE  KWH RATE (CAN BE UPDATED, BUT NOT REQUIRED)  INTERIOR OR EXTERIOR LIGHTING</p> <p><b>New LED Fixture</b>  QUANTITY  EXISTING FIXTURE  KWH RATE (CAN BE UPDATED, BUT NOT REQUIRED)  INTERIOR OR EXTERIOR LIGHTING</p>	INTERIOR OR EXTERIOR LIGHTING
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**Required Documentation**

<b>No Pre-Approval (NPA) Projects or Rebates Less than \$5000</b>	<b>Pre-Approval (PA) Projects or Rebates \$5,000 or more:</b>
<p>W-9 (MOST CURRENT YEAR, SIGNED AND DATED)  Lighting and controls cut sheet(s)  Dated Invoice as described above</p>	<p><b>For Pre-Approval:</b>  W-9 (MOST CURRENT YEAR, SIGNED AND DATED)  Lighting and controls cut sheet(s)</p> <p><b>For Final Approval:</b>  Dated and Itemized Invoice</p>
<p><b>Upload all documents as one PDF. If you are unable to upload as one PDF:</b>  Email additional documents to <a href="mailto:businessrebates@oppd.com">businessrebates@oppd.com</a> with Project Number in subject line of email.  Submit a message in the Application Dashboard stating that additional documents have been emailed.</p>	

[Sample Documentation](#)

# HEATING, VENTILATION AND AIR CONDITIONING (HVAC)

## Heating, Ventilation and Air Conditioning (HVAC): Project Requirements, Terms & Conditions & Required Documentation

[Rebate Combinations](#)

[Pre-Approval Requirements](#)

[Eligible Equipment](#)

[Rebate Amounts](#)

[Project Requirements](#)

[Application Equipment Fields](#)

[Required Documentation](#)

### Rebate Combinations

The following rebates CAN be combined with HVAC Business Rebate projects:	The following CAN NOT be combined with HVAC Business Rebate projects:
ENERGY STAR® Portfolio Manager Benchmarking ENERGY STAR® Certification Lighting and Lighting Controls Advanced Rooftop Unit Controller (ARC) Small to Medium Business (SMB) Direct Install	Small Building Management Systems (SBMS) Building Management System (BMS) Retro-Commissioning ENERGY STAR® Building Custom Energy Study
Rebate Amounts	Project Requirements
Rebate Minimum: \$100 Rebate Maximum: \$100,000	Building Sq/Ft: N/A Minimum Conditioned: N/A Minimum Conditioned %: N/A Rebate Per Sq/Ft: N/A Project Cost %: N/A Further Defined: N/A Frequency in Years: Varies

### Pre-Approval Requirements

- Only for Projects \$5,000 or more

### Eligible Equipment

1. Rooftop Units
2. Chillers
3. Heat Pumps
4. Split HVAC
5. PTAC

### Rebate Amounts

HVAC Rebates		
Air Cooled	EER	Per Ton
Air Cooled Split System less than 5.4 tons	12.0 to 13.9	\$ 100
	14 and higher	\$ 200
Air Cooled Packaged System less than 5.4 tons	12.9 to 14.5	\$ 100
	14.6 and higher	\$ 200
PTAC less than 2.5 tons	11.1 to 12.4	\$ 100
	12.5 and higher	\$ 200



RTU or Split System 5.4 tons to 11.25 tons	11.85 to 13.74	\$	100
	13.75 and higher	\$	200
RTU or Split System 11.26 tons to 20 tons	11.6 to 13.4	\$	100
	13.5 and higher	\$	200
RTU or Split System 20.1 tons to 63.3 tons	10.5 to 11.9	\$	100
	12.0 and higher	\$	200
RTU or Split System over 63.3 tons	10.25 to 11.4	\$	100
	11.5 and higher	\$	200
<b>Water Cooled</b>	<b>EER</b>	<b>Per Ton</b>	
Water Cooled System less than 5.4 tons	12.8 to 14.24	\$	100
	14.25 and higher	\$	200
Water Cooled System 5.4 tons to 11.25 tons	12.75 to 13.9	\$	100
	14.0 and higher	\$	200
Water Cooled System 11.26 tons to 20 tons	13.2 to 14.4	\$	100
	14.5 and higher	\$	200
Water Cooled System 20.1 tons to 63.3 tons	13.0 to 14.4	\$	100
	14.5 and higher	\$	200
Water Cooled System over 63.3 tons	12.85 to 13.9	\$	100
	14.0 and higher	\$	200
<b>Heat Pump Rebates</b>			
<b>Air Source Heat Pumps</b>	<b>EER</b>	<b>Per Ton</b>	
Air Source Heat Pump Split and Packaged Less than 5.4 tons	12.9 to 13.9	\$	100
	14.0 and higher	\$	200
Packaged Terminal Heat Pump less than 2.5 tons	11.05 to 11.9	\$	100
	12.0 and higher	\$	200
Air Source Heat Pump 5.4 tons to 11.25 tons	11.6 to 12.8	\$	100
	12.9 and higher	\$	200
Air Source Heat Pump 11.26 tons to 20 tons	11.75 to 12.6	\$	100
	12.7 and higher	\$	200
Air Source Heat Pump over 20 tons	10.6 to 11.7	\$	100
	11.8 and higher	\$	200
<b>Water Source Heat Pump</b>	<b>EER</b>	<b>Per Ton</b>	
Water Source Heat Pump - Water to Air less than 1.41 tons California Loop	13.65 to 14.9	\$	100
	15.0 and higher	\$	200
Water Source Heat Pump - Water to Air over 1.41 tons California Loop	14.45 to 15.6	\$	100
	15.7 and higher	\$	200
Water Source Heat Pump - Water to Water any size California Loop	11.75 to 12.9	\$	100
	13 and higher	\$	200
Water Source Heat Pump - Water to Air any size with 59-degree EWT AHRI Rating	20 and higher	\$	100

Water Source Heat Pump - Water to Water Heat Pump Systems any size with 59-degree EWT AHRI Rating	18 and higher	\$	100
Water Source Heat Pump - Water to Air any size with 77-degree EWT AHRI Rating	15.65 to 17.4	\$	100
	17.5 and higher	\$	200
Water Source Heat Pump - Water to Water any size with 77-degree EWT AHRI Rating	13.4 to 14.5	\$	100
	14.6 and higher	\$	200
<b>Chiller Rebates</b>			
<b>Chillers</b>	<b>kW/Ton</b>	<b>Per Ton</b>	
Any Air-Cooled Chiller	.849 and lower	\$	300
	1.04 to .085	\$	200
	1.12 to 1.05	\$	100
Positive Displacement Chiller less than 75 Tons	0.599 and lower	\$	200
	.675 to .60	\$	100
Positive Displacement Chiller up to 150 Tons	.54 and lower	\$	200
	.65 to .55	\$	100
Positive Displacement Chiller 150 to 300 Tons	.49 and lower	\$	200
	.60 to .50	\$	100
Positive Displacement Chiller 300 to 600 Tons	.494 and lower	\$	200
	.55 to .495	\$	100
Positive Displacement Chiller over 600 Tons	.474 and lower	\$	100
	.51 to .475	\$	50
Centrifugal Chiller up to 300 Tons	.49 and lower	\$	100
	.55 to .50	\$	50
Centrifugal Chiller 300 to 600 Tons	.474 and lower	\$	100
	.51 to .475	\$	50
Centrifugal Chiller over 600 Tons	.474 and lower	\$	100
	.51 to .475	\$	50

### Project Requirements

1. Replaced equipment must be removed from service.
2. Equipment must be installed and operating prior to submission of an invoice to OPPD.
3. Equipment must be above the current Nebraska Energy Code<sup>1</sup> requirements for cooling efficiency level in order to qualify for energy efficiency rebate.
4. Performance criteria is based upon standard Air-Conditioning, Heating and Refrigeration Institute (AHRI) conditions for the equipment categories listed. The upload of an AHRI certificate or specification sheet(s) showing such are required.
5. Both new construction and replacement cooling and heat pumps are eligible for HVAC rebates.
6. Conversion and new construction heat pumps of any efficiency level qualify for a rebate of \$50 per nominal ton.

7. Conversion and new construction heat pumps above current Nebraska Energy Code requirements will receive a rebate combined of \$50 per nominal ton and the appropriate rebate associated with the efficiency level.
8. Preapproved new construction rebates will have funding set aside until the date specified by the Trade Ally and noted by the Trade Ally in the project notes located within the application.
9. Itemized invoice variations for projects that are bid as a package may be accepted, provided OPPD is able to obtain all critical invoice information from the Trade Ally.
10. Project completion for replacement and retrofits over \$5,000 shall be within three (3) months of OPPD preapproval and invoice must arrive within one (1) month of completion in order for rebate funding to be available. Any invoice arriving over 120 days from preapproval may no longer be funded.
11. A dated and itemized invoice with quantity, manufacturer, model number and cost for each piece of equipment must be submitted within 30 days of invoice date in order to receive a rebate payment. Labor does not have to be itemized on a per piece of equipment basis.
12. HVAC rebate limit per building per calendar year is \$100,000

<sup>1</sup>The Nebraska Energy Code is currently based on the 2018 International Energy Conservation Code (IECC) and ASHRAE 90.1- 2016.

### Application Equipment Fields

Air Cooled (RTU, Split Systems)	Air Source Heat Pump	Chiller (Air Cooled, Centrifugal, Positive Disp.)
<p><b>Air- Cooled Cooling System</b>            QUANTITY            EER            MANUFACTURER            MODEL NUMBER            TONS            BTUH</p> <p><b>Packaged Terminal A/C &lt;= 30,000</b>            QUANTITY            EER            MANUFACTURER            MODEL NUMBER            TONS</p> <p><b>Packaged/Split AC &lt;= 65,000</b>            QUANTITY            EER            MANUFACTURER            MODEL NUMBER            TONS            SYSTEM TYPE</p>	<p><b>Air Source Heat Pump Systems</b>            QUANTITY            EER            BTUH            MANUFACTURER            TONS            MODEL NUMBER            HEAT PUMP INSTALLATION TYPE</p> <p><b>Package Terminal ASHP &lt;= 30,000</b>            QUANTITY            HEAT PUMP INSTALLATION TYPE            EER            MANUFACTURER            MODEL NUMBER            TONS</p> <p><b>Packaged/Split ASHP &lt;= 65,000</b>            QUANTITY            EER            SYSTEM TYPE                PACKAGED                SPLIT            MANUFACTURER            TONS            MODEL NUMBER            HEAT PUMP INSTALLATION TYPE                NEW CONTRUCTION                CONVERSION                REPLACEMENT</p>	<p><b>Air-Cooled Chiller</b>            QUANTITY            KW PER TON            MANUFACTURER            MODEL NUMBER            TONS</p> <p><b>Centrifugal Chiller</b>            QUANTITY            KW PER TON            MANUFACTURER            MODEL NUMBER            TONS</p> <p><b>Positive Displacement Chiller</b>            QUANTITY            KW PER TON            MANUFACTURER            MODEL NUMBER            TONS</p>

Water Cooled (RTU, Split Systems)	Water Source Heat Pump
<p><b>Water-Cooled Cooling System</b>            QUANTITY            EER</p>	<p><b>Water-To-Air</b>            QUANTITY            EER</p>

MANUFACTURER MODEL NUMBER TONS BTUH	MANUFACTURER MODEL NUMBER EWT 59 77 TONS HEAT PUMP INSTALLATION TYPE NEW CONSTRUCTION CONVERSION REPLACEMENT  <b>Water-To-Air EWT California Loop</b> QUANTITY HEAT PUMP INSTALLATION TYPE NEW CONSTRUCTION CONVERSION REPLACEMENT EER MANUFACTURER MODEL NUMBER EWT TONS  <b>Water-To-Water</b> QUANTITY HEAT PUMP INSTALLATION TYPE NEW CONSTRUCTION CONVERSION REPLACEMENT EER MANUFACTURER MODEL NUMBER EWT TONS
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### Required Documentation

No Pre-Approval (NPA) Projects or Rebates Less than \$5000	Pre-Approval (PA) Projects or Rebates \$5,000 or more:
W-9 (MOST CURRENT YEAR, SIGNED AND DATED) AHRI Certificate or Chiller specifications showing kW/ton at AHRI standard conditions Dated Invoice as described above	<b>For Pre-Approval:</b> W-9 (MOST CURRENT YEAR, SIGNED AND DATED) AHRI Certificate or Chiller specifications showing kW/ton at AHRI standard conditions  <b>For Final Approval:</b> Dated and Itemized Invoice
<b>Upload all documents as one PDF. If you are unable to upload as one PDF:</b> Email additional documents to <a href="mailto:businessrebates@oppd.com">businessrebates@oppd.com</a> with Project Number in subject line of email. Submit a message in the Application Dashboard stating that additional documents have been emailed.	

[Sample Documentation](#)

# ADVANCED ROOFTOP UNIT CONTROLLERS (ARC)

## Advanced Rooftop Unit Controllers (ARC): Project Requirements, Terms & Conditions & Required Documentation

[Rebate Combinations](#)

[Pre-Approval Requirements](#)

[Eligible Equipment](#)

[Rebate Amounts](#)

[Project Requirements](#)

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### Rebate Combinations

The following rebates CAN be combined with Advanced Rooftop Unit Controller (ARC) Business Rebate projects:	The following CAN NOT be combined with Advanced Rooftop Unit Controller (ARC) Business Rebate projects:
ENERGY STAR® Portfolio Manager Benchmarking ENERGY STAR® Certification HVAC (RTUs, Heat Pumps, Split, Chillers) Lighting and Lighting Controls Small to Medium Business (SMB) Direct Install	Small Building Management Systems (BMS) Building Management System (BMS) Retro-Commissioning ENERGY STAR® Building Custom Energy Study

Rebate Amounts	Project Requirements
Rebate Minimum: \$100 Rebate Maximum: \$100,000	Building Sq/Ft: N/A Minimum Conditioned: N/A Minimum Conditioned %: N/A Rebate Per Sq/Ft: N/A Project Cost %: N/A Further Defined: N/A Frequency in Years: Varies

### Pre-Approval Requirements

- Only Projects over \$5,000

### Eligible Equipment

- Rooftop Units

### Rebate Amounts

Advanced Rooftop Unit Controller (ARC)				
Tonnage of existing RTU	Bes-Tech: Digi RTU	Transformative Wave: Catalyst	Pelican Solutions: Pearl w/ Fan Control	NexRev: DrivePak
1	\$ 207.00	\$ 135.00	\$ 135.00	\$ 135.00
2	\$ 414.00	\$ 270.00	\$ 270.00	\$ 270.00
3	\$ 621.00	\$ 405.00	\$ 405.00	\$ 405.00
3.5	\$ 724.50	\$ 472.50	\$ 472.50	\$ 472.50
4	\$ 828.00	\$ 540.00	\$ 540.00	\$ 540.00
5	\$ 1,035.00	\$ 675.00	\$ 675.00	\$ 675.00
6	\$ 1,242.00	\$ 810.00	\$ 810.00	\$ 810.00
6.5	\$ 1,345.50	\$ 877.50	\$ 877.50	\$ 877.50

7	\$ 1,449.00	\$ 945.00	\$ 945.00	\$ 945.00
7.5	\$ 1,552.50	\$ 1,012.50	\$ 1,012.50	\$ 1,012.50
8	\$ 1,656.00	\$ 1,080.00	\$ 1,080.00	\$ 1,080.00
8.5	\$ 1,759.50	\$ 1,147.50	\$ 1,147.50	\$ 1,147.50
9	\$ 1,863.00	\$ 1,215.00	\$ 1,215.00	\$ 1,215.00
10	\$ 2,070.00	\$ 1,350.00	\$ 1,350.00	\$ 1,350.00
11	\$ 2,277.00	\$ 1,485.00	\$ 1,485.00	\$ 1,485.00
12	\$ 2,484.00	\$ 1,620.00	\$ 1,620.00	\$ 1,620.00
12.5	\$ 2,587.50	\$ 1,687.50	\$ 1,687.50	\$ 1,687.50
13	\$ 2,691.00	\$ 1,755.00	\$ 1,755.00	\$ 1,755.00
13.5	\$ 2,794.50	\$ 1,822.50	\$ 1,822.50	\$ 1,822.50
14	\$ 2,898.00	\$ 1,890.00	\$ 1,890.00	\$ 1,890.00
15	\$ 3,105.00	\$ 2,025.00	\$ 2,025.00	\$ 2,025.00
16	\$ 3,312.00	\$ 2,160.00	\$ 2,160.00	\$ 2,160.00
17	\$ 3,519.00	\$ 2,295.00	\$ 2,295.00	\$ 2,295.00
17.5	\$ 3,622.50	\$ 2,362.50	\$ 2,362.50	\$ 2,362.50
18	\$ 3,726.00	\$ 2,430.00	\$ 2,430.00	\$ 2,430.00
19	\$ 3,933.00	\$ 2,565.00	\$ 2,565.00	\$ 2,565.00
20	\$ 4,140.00	\$ 2,700.00	\$ 2,700.00	\$ 2,700.00
25	\$ 5,175.00	\$ 3,375.00	\$ 3,375.00	\$ 3,375.00
30	\$ 6,210.00	\$ 4,050.00	\$ 4,050.00	\$ 4,050.00
35	\$ 7,245.00	\$ 4,725.00	\$ 4,725.00	\$ 4,725.00
40	\$ 8,280.00	\$ 5,400.00	\$ 5,400.00	\$ 5,400.00

### Project Requirements

1. Only retrofit 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.
4. ARC rebates are for existing buildings only. New construction projects do not qualify.
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. Project completion for all rebates over \$5,000 shall be within three (3) months of OPPD preapproval and invoice must arrive within one (1) month of completion in order for rebate funding to be available. Any invoice arriving over 120 days from preapproval may no longer be funded.
7. Once the project over \$5,000 is complete, a dated and itemized invoice with quantity, manufacturer, model number and cost for each piece of equipment must be submitted within 30 days of invoice date in order to receive a rebate payment. Labor does not have to be itemized on a per piece of equipment basis.
8. ACR rebate limit per building per calendar year is \$100,000

### Application Equipment Fields

<b>Air Cooled (RTU, Split Systems)</b>
<b>Bes-Tech Digi RTU</b>
QUANTITY
TONNAGE OF EXISTING RTU
KWH RATE (CAN BE UPDATED, BUT NOT REQUIRED)
SERVICE AGREEMENT COMPANY NAME

**NextRev - DrivePak**

QUANTITY

TONNAGE OF EXISTING RTU

KWH RATE (CAN BE UPDATED, BUT NOT  
REQUIRED)

SERVICE AGREEMENT COMPANY NAME

**Pelican Solutions - Pearl**

QUANTITY

TONNAGE OF EXISTING RTU

KWH RATE (CAN BE UPDATED, BUT NOT  
REQUIRED)

SERVICE AGREEMENT COMPANY NAME

**Transformative Wave - Catalyst**

QUANTITY

TONNAGE OF EXISTING RTU

KWH RATE (CAN BE UPDATED, BUT NOT  
REQUIRED)

SERVICE AGREEMENT COMPANY NAME

**Required Documentation**

<b>No Pre-Approval (NPA) Projects or Rebates Less than \$5000</b>	<b>Pre-Approval (PA) Projects or Rebates \$5,000 or more:</b>
W-9 (MOST CURRENT YEAR, SIGNED AND DATED) ARC Cut Sheet(s) Dated Invoice as described above	<b>For Pre-Approval:</b> W-9 (MOST CURRENT YEAR, SIGNED AND DATED) ARC Cut Sheet(s)  <b>For Final Approval:</b> Dated and Itemized Invoice
<b>Upload all documents as one PDF. If you are unable to upload as one PDF:</b> Email additional documents to <a href="mailto:businessrebates@oppd.com">businessrebates@oppd.com</a> with Project Number in subject line of email. Submit a message in the Application Dashboard stating that additional documents have been emailed.	

[Sample Documentation](#)

## Custom: Project Requirements, Terms & Conditions & Required Documentation

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### Rebate Combinations

The following rebates CAN be combined with Custom Business Rebate projects:	The following CAN NOT be combined with Custom Business Rebate projects:
ENERGY STAR® Portfolio Manager Benchmarking ENERGY STAR® Certification Energy Study	Small Building Management Systems (SBMS) Building Management System (BMS) Retro Commissioning ENERGY STAR® Building Lighting and Lighting Controls HVAC (RTUs, Heat Pumps, Split, Chillers) Advanced Rooftop Unit Controller (ARC) Small to Medium Business (SMB) Direct Install

Rebate Amounts	Project Requirements
Rebate Minimum: \$100 Rebate Maximum: \$5,000	Building Sq/Ft: N/A Minimum Conditioned: N/A Minimum Conditioned %: N/A Rebate Per Sq/Ft: N/A Project Cost %: N/A Further Defined: N/A Frequency in Years: Varies

### Pre-Approval Requirements

- All Custom Rebates require Pre-Approval

### Eligible Equipment

- Envelope
- Other
- Control Systems
- HVAC
- Compressed Air Systems
- Motors

### Rebate Amounts

Custom Project	
Rebate Amounts	
Per kW of Measured and Verified Peak Demand Reduction	\$500



## Project Requirements

1. All CUSTOM Rebates must be preapproved regardless of rebate amount.
2. The CUSTOM REBATE PROJECT NOTIFICATION FORM must be provided to OPPD by the Trade Ally and both must approve prior to the submission of any Custom Project rebate.
3. 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. The project must also show verified, sustainable, energy saving of at least 5%.
4. 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
5. 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.
6. An Energy Study is required for all Custom Projects however applying for an Energy Study rebate is not required.
7. 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.
8. 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 preapproval.
  - e. Written request by the Trade Ally for the advance 30% of expected kW peak demand rebate.
9. 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.
10. 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.
11. The Trade Ally is responsible for producing the final case study documenting kW and kWh reduction.
12. The Custom Rebate is paid post project completion and post OPPD billing months of June through September<sup>1</sup> and pending OPPD case study approval.
13. 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.
14. 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.
15. 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.

<sup>1</sup> 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 Custom Rebate Project Notification Form.**

### **M&V Guidelines are based on IPMVP other M&V options may be available based on the scope of the project:**

1. 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 conditions.
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 conditions. (This follows IPMVP Option B)

3. 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.

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. K-12 school projects to utilize only September data for peak power usage determination.

\*Projects with expected rebate amounts above \$100,000 may be approved by OPPD and will be considered on a case-by-case basis.

EXAMPLE: Passes

Bill Dates - Pre	Peak kW	Bill Dates - Post	Peak kW
Jun 10 - Jul 8	200	Jun 8 - Jul 7	187
Jul 8 - Aug 9	257	Jul 7 - Aug 8	220
Aug 9 - Sep 9	272	Aug 8 - Sep 8	241
Sep 9 - Oct 10	236	Sep 8 - Oct 9	210
<b>Total Peak</b>	<b>965</b>	<b>Total Peak</b>	<b>858</b>
Number of Months	4	Number of Months	4
<b>Ave Peak Pre</b>	<b>241.25</b>	<b>Ave Peak Post</b>	<b>214.5</b>
		Difference	27
		kW reduction in %	11%

**NOTE: Round the difference up to a whole number.**

EXAMPLE: Fail (percentage savings too low)

Bill Dates - Pre	Peak kW	Bill Dates - Post	Peak kW
Jun 10 - Jul 8	200	Jun 8 - Jul 7	195
Jul 8 - Aug 9	257	Jul 7 - Aug 8	250
Aug 9 - Sep 9	272	Aug 8 - Sep 8	262
Sep 9 - Oct 10	236	Sep 8 - Oct 9	234
<b>Total Peak</b>	<b>965</b>	<b>Total Peak</b>	<b>941</b>
Number of Months	4	Number of Months	4
<b>Ave Peak Pre</b>	<b>241.25</b>	<b>Ave Peak Post</b>	<b>235.25</b>
		Difference	6
		kW reduction in %	2%

### What to expect after receiving pre-approval

1. 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).
2. 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.

3. You will be notified via email to remind of the fund's 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.

### Application Equipment Fields

Air Cooled (RTU, Split Systems)
<b>Custom Project</b>
QUANTITY
TYPE OF CUSTOM PROJECT (select from drop down menu)
ENVELOPE
OTHER
CONTROL SYSTEM/COMMISSIONING
HVAC
MOTORS
COMPRESSED AIR
DESCRIPTION
LIFE OF MEASURE
PROJECTED TOTAL ENERGY SAVINGS (%)
ELECTRICITY (KWH/YR)
M&V METHOD
UTILITY BILL COMPARISON
SYSTEM SUBMETER
INDIVIDUAL SUBMETER
BASELINE PERIOD START DATE (MM/DD/YYYY)
PEAK KW DURING BASELINE
ESTIMATED ANNUAL SAVINGS (\$)
ESTIMATED SAVINGS REPORT SUBMITTAL DATE
YEAR BUILT
BUILDING SQUARE FOOTAGE

### Required Documentation

Pre-Approval (PA) Projects or Rebates \$5,000 or more:
<b>For Pre-Approval:</b> Completed and signed Custom Project Notification Form Energy Study W-9 (MOST CURRENT YEAR, SIGNED AND DATED) Confirmation of customer commitment to move forward with the project.
<b>For Final Approval:</b> Case study showing measured and verified peak kW, kWh and therm reduction. Confirmation of Trained Staff Dated Invoice showing equipment installed, may be listed as a lump sum. Documentation of Customer acceptance that project has been completed
<b>Upload all documents as one PDF. If you are unable to upload as one PDF:</b> Email additional documents to <a href="mailto:businessrebates@oppd.com">businessrebates@oppd.com</a> with Project Number in subject line of email. Submit a message in the Application Dashboard stating that additional documents have been emailed.

[Sample Documentation](#)

# SMALL BUILDING MANAGEMENT SYSTEMS (SBMS)

## Small Business Building Management Systems (SBMS): Project Requirements, Terms & Conditions & Required Documentation

[Rebate Combinations](#)

[Pre-Approval Requirements](#)

[Rebate Amounts](#)

[Project Requirements](#)

[Application Equipment Fields](#)

[Required Documentation](#)

### Rebate Combinations

The following rebates CAN be combined with Small Business Management Systems (SBMS) Business Rebate projects:	The following CAN NOT be combined with Small Business Management Systems (SBMS) Business Rebate projects:
ENERGY STAR® Certification Small to Medium Business (SMB) Direct Install	Building Management System (BMS) Retro Commissioning ENERGY STAR® Building ENERGY STAR® Portfolio Manager Benchmarking Custom Energy Study HVAC (RTUs, Heat Pumps, Split, Chillers) Lighting and Lighting Controls Advanced Rooftop Unit Controller (ARC)

Rebate Amounts	Project Requirements
Rebate Minimum: \$100 Rebate Maximum: \$15,000	Building Sq/Ft: 20,000 or less Minimum Conditioned: 1,000 Rebate Per Sq/Ft: \$0.75 Project Cost %: 40 Further Defined: Whichever is Less Frequency in Years: 15

### Pre-Approval Requirements

- Only for Projects over \$5,000

### Rebates Amount

Small Business Building Management System (BMS) Rebate Amounts	
\$ .75 per sq/ft conditioned* or 40% of cost, whichever is less	up to \$15,000

\*Unconditioned space and heating only space will not be included.

### Project Requirements

1. Small Business BMS rebate is for existing buildings only.
2. All applications with projected rebate of \$5,000 or greater must be preapproved.
3. BMS must control a minimum of 1,000 square feet and the space must be conditioned for both heating and cooling.
4. Building must be equal to or less than 20,000 square feet
5. Rebate will be paid based on square feet of fully conditioned space (unconditioned space and heating only space will not be included).
6. BMS must leverage open protocol communication standard: BACnet, Modbus or LonWorks.
7. BMS must be installed, operational and commissioned in order to qualify.

8. Facility staff must be trained prior to any rebate payment being made.
9. The BMS must utilize connected thermostats designed for commercial applications that have the ability to be recruited for demand response activities and do not qualify for any OPPD Residential Thermostat program or are considered for use on residential equipment.
10. The BMS must include the following at a minimum: Individually addressable room controllers and cloud connectivity.
11. A building will not qualify for both a Small Building BMS rebate and a lighting controls rebate if it is determined the energy savings results and demand reduction results would be over counted. These situations will be reviewed on a case-by-case basis and rebate amounts will be adjusted to ensure double counting nor double payment occurs.
12. BMS must be installed within a building not previously controlled, controlled using non-communicating thermostats, controlled via non-communicating electrical controls or as a replacement of pneumatic controls.
13. Any existing controls should be removed as much as practical in order to qualify.
14. Buildings are eligible for a maximum of one BMS rebate per premise every 15 years.
15. An estimate of projected savings in kW, kWh and therms based on the controls implementation and using the existing energy usage and operation as the baseline is required. – A 10% savings over current baseline, may be used if no formal projection of savings has been developed.
16. BMS must meet all applicable state and local energy and building codes and standards.
17. Building must be benchmarked by an approved Trade Ally in Portfolio Manager, the EPA’s free benchmarking tool, and the ENERGY STAR score reported as part of the application process.
18. Savings must be deemed to be sustainable for a period of five years. In order to complete this requirement, the ENERGY STAR rating/Portfolio Account Tracking needs to be maintained for a period of three years by the customer or the Trade Ally (OPPD may also provide this service at a nominal cost to the customer and customer must agree to provide gas or other, non-electric, utility data proactively to OPPD for the three year duration). This tracking must be determined prior to any payment being made.
19. OPPD must be granted Portfolio Manager viewing rights to the building to confirm the score and for a period of up to three years post rebate payment\*.
20. If building ownership changes and the party responsible for paying the OPPD bill at the building changes within the three year follow up period the benchmarking requirement will no longer be enforced however, OPPD will continue to have the right to monitor OPPD bills for the three-year duration.
21. BMS for Small Business rebate amount will be 40% of the total project cost or \$.75 per square feet of conditioned space whichever is less and with a rebate limit of \$15,000 per building.
22. Project completion for rebates over \$5,000 shall be within three (3) months of OPPD preapproval and invoice must arrive within one (1) month of completion in order for rebate funding to be available. Any invoice arriving over 120 days from preapproval may no longer be funded. Contact OPPD if an extension is needed for project completion.
23. Projects receiving rebates less than \$5,000 should be completed before applying for any rebate and must be applied for within 120 days of invoice date.
24. Projects committed to or completed prior to November 1, 2024 do not qualify for this rebate.

\*18 - This is done to ensure BMS savings results are sustainable for five years and is intended to assist the customer by not requiring they proactively provide that information each year.

### Application Equipment Fields

Building Management System
<b>Buildings: &lt;= 20,000 sq. ft.</b>
QUANTITY
BUILDING SQUARE FOOTAGE
CONDITIONED SPACE SQUARE FOOTAGE
YEAR BUILT
TOTAL PROJECT COST
ENERGY STAR PORTFOLIO MANAGER SCORE BEFORE INSTALLATION
KW PEAK DEMAND BEFORE INSTALLATION
12 MONTHS KWH USAGE BEFORE INSTALLATION
12 MONTHS THERM USAGE BEFORE INSTALLATION

PROJECTED ANNUAL SAVINGS KW  
 PROJECTED ANNUAL SAVINGS KWH  
 PROJECTED ANNUAL SAVINGS THERMS  
 BMS MANUFACTURER  
 BMS MODEL  
 WHO WILL BE MAINTAINING ENERGY STAR SCORE IN PORTFOLIO MANAGER  
     TRADE ALLY  
     CUSTOMER  
     OPPD  
 HAS PORTFOLIO MANAGER VIEWING PRIVILEGES BEEN GRANTED TO OPPD  
     YES  
     NO

### Required Documentation

No Pre-Approval (NPA) Projects or Rebates Less than \$5000	Pre-Approval (PA) Projects or Rebates \$5,000 or more:
<p>W-9 (MOST CURRENT YEAR, SIGNED AND DATED)</p> <p>Controls cut sheet verifying compliance</p> <p>Dated Invoice showing itemized list of equipment installed. Total project cost may be listed as a lump sum</p> <p>Confirmation of Trained Staff</p>	<p><b>For Pre-Approval:</b> W-9 (MOST CURRENT YEAR, SIGNED AND DATED)</p> <p>Controls cut sheet verifying compliance</p> <p><b>For Final Approval:</b> Confirmation of Trained Staff</p> <p>Dated Invoice showing equipment installed, may be listed as a lump sum.</p>
<p><b>Upload all documents as one PDF. If you are unable to upload as one PDF:</b>            Email additional documents to <a href="mailto:businessrebates@oppd.com">businessrebates@oppd.com</a> with Project Number in subject line of email.            Submit a message in the Application Dashboard stating that additional documents have been emailed.</p>	

[Sample Documentation](#)

# BUILDING MANAGEMENT SYSTEMS (BMS)

## Building Management Systems (BMS): Project Requirements, Terms & Conditions & Required Documentation

[Rebate Combinations](#)

[Pre-Approval Requirements](#)

[Rebate Amounts](#)

[Project Requirements](#)

[Application Equipment Fields](#)

[Required Documentation](#)

### Rebate Combinations

The following rebates CAN be combined with Business Management Systems (BMS) Business Rebate projects:	The following CAN NOT be combined with Business Management Systems (BMS) Business Rebate projects:
ENERGY STAR® Certification	Retro Commissioning ENERGY STAR® Building ENERGY STAR® Portfolio Manager Benchmarking Custom Energy Study HVAC (RTUs, Heat Pumps, Split, Chillers) Lighting and Lighting Controls Advanced Rooftop Unit Controller (ARC) Small to Medium Business (SMB) Direct Install

Rebate Amounts	Project Requirements
Rebate Minimum: \$100 Rebate Maximum: \$100,000	Building Sq/Ft: 20,000 to 300,000 Minimum Conditioned: 10,000 Rebate Per Sq/Ft: \$0.60 Project Cost: 30 Further Defined: Whichever is Less Frequency in Years: 15

### Pre-Approval Requirements

- Only Projects over \$5,000

### Rebate Amounts

Building Management System (BMS) Rebate Amounts	
\$ .60 per sq/ft conditioned* or 30% of cost, whichever is less	\$100,000 Max

\*Unconditioned space and heating only space will not be included.

### Project Requirements

1. BMS rebate is for existing buildings only.
2. All applications with projected rebate of \$5,000 or greater must be preapproved.
3. BMS must control a minimum of 10,000 square feet and the space must be conditioned for both heating and cooling.
4. Building must be 20,000 to 300,000 square feet in order to qualify.
5. Rebate will be paid based on square feet of fully conditioned space (unconditioned space and heating only space will not be included).
6. BMS must leverage open protocol communication standard: BACnet, Modbus or LonWorks.
7. BMS must be installed, operational and commissioned in order to qualify.

8. Facility staff must be trained prior to any rebate payment being made.
9. The BMS must utilize direct digital controls.
10. BMS must be installed within a building not previously controlled, controlled using non-communicating thermostats, controlled via non-communicating electrical controls or as a replacement of pneumatic controls.
11. The BMS must include the control of all HVAC equipment and some portion of indoor lighting at a minimum
12. A building will not qualify for both a BMS rebate and a lighting controls rebate if it is determined the energy savings results and demand reduction results would be over counted. These situations will be reviewed on a case-by-case basis and rebate amounts will be adjusted to ensure double counting nor double payment occurs.
13. Existing controls must be removed as much as practical in order to qualify.
14. Buildings are eligible for a maximum of one BMS rebate per premise every 15 years.
15. Projected savings in kW, kWh and therms are required to be provided as part of the application process.
16. BMS must meet all applicable state and local energy and building codes and standards.
17. Building must be benchmarked by an approved Trade Ally in Portfolio Manager, the EPA's free benchmarking tool, and the ENERGY STAR score reported as part of the application process.
18. Savings must be deemed to be sustainable for a period of five years. In order to complete this requirement, the ENERGY STAR rating/Portfolio Account Tracking needs to be maintained for a period of three years by the customer or the Trade Ally (OPPD may also provide this service at a nominal cost to the customer and customer must agree to provide gas or other, non-electric, utility data proactively to OPPD for the three year duration). However, this tracking must be determined prior to any payment being made.
19. OPPD must be granted Portfolio Manager viewing rights to the building to confirm the score and for a period of up to three years post rebate payment\*.
20. If building ownership changes and the party responsible for paying the OPPD bill at the building changes within the three year follow up period the benchmarking requirement will no longer be enforced however OPPD will continue to have the right to monitor OPPD bills for the three-year duration.
21. For buildings with over 20,000 square feet of conditioned space the following documentation is required:
  - a) Proposed Control System: Submit a detailed scope of work that includes the following information about the proposed BMS:
    - A list of new control points, including all AO, AI, DO and DI.
    - A list or cut sheets of new controls hardware to be installed.
    - Sequences of operation.
    - If available, provide controls diagrams.
    - Provide both material and labor costs to implement the proposed control strategies.
  - b) Equipment to be Controlled: Submit documentation of the existing equipment that will be controlled via the new BMS, including:
    - Mechanical schedules, drawings or other technical information for the Air Handlers, Chillers, Pumps, Cooling Towers, Heat Exchangers and other equipment, that includes the capacities, flow rates, etc.,
  - c) Energy Study: An engineering analysis of the estimated energy savings based on implementation of the proposed measure. Use the existing system operation as the baseline.
    - In cases where a project includes multiple ECMS, the engineering analysis must ensure the interactive effects of energy savings measures are accounted for and do not overlap. For example, if one measure is time of day shutdown, and the next measure is static pressure reset, the baseline energy consumption for the static pressure reset measure shall use the reduced hours of time-of-day shutdown.
22. BMS rebate amount will be 30% of the total project cost or \$.60 per square feet of conditioned space whichever is less and with a rebate limit of \$100,000 per building.
23. Project completion for rebates over \$5,000 shall be within twelve (12) months of OPPD preapproval and invoice must arrive within one (1) month of completion in order for rebate funding to be available. Any invoice arriving over this time limit may no longer be funded.
24. Projects committed to or completed prior to November 1, 2024 do not qualify for this rebate.

\*18 - This is done to ensure BMS savings results are sustainable for five years and is intended to assist the customer by not requiring they proactively provide that information each year.



## Application Equipment Fields

Building Management System
<p><b>Buildings: &lt;20,000 sq. ft.</b></p> <p><b>EQUIPMENT</b></p> <p>Quantity</p> <p>BUILDING SQUARE FOOTAGE</p> <p>CONDITIONED SPACE SQUARE FOOTAGE</p> <p>YEAR BUILT</p> <p>TOTAL PROJECT COST</p> <p>ENERGY STAR PORTFOLIO MANAGER SCORE BEFORE INSTALLATION</p> <p>KW PEAK DEMAND BEFORE INSTALLATION</p> <p>12 MONTHS KWH USAGE BEFORE INSTALLATION</p> <p>12 MONTHS THERM USAGE BEFORE INSTALLATION</p> <p>PROJECTED ANNUAL SAVINGS KW</p> <p>PROJECTED ANNUAL SAVINGS KWH</p> <p>PROJECTED ANNUAL SAVINGS THERMS</p> <p>BMS MANUFACTURER</p> <p>BMS MODEL</p> <p>WHO WILL BE MAINTAINING ENERGY STAR SCORE IN PORTFOLIO MANAGER</p> <p>TRADE ALLY</p> <p>CUSTOMER</p> <p>OPPD</p> <p>HAS PORTFOLIO MANAGER VIEWING PRIVILEGES BEEN GRANTED TO OPPD</p> <p>YES</p> <p>NO</p> <p><b>ADDITIONAL EQUIPMENT INFORMATION</b></p> <p>General summer temperature set point pre-project - occupied</p> <p>General summer temperature set point pre-project - unoccupied</p> <p>General summer temperature set point post project - occupied</p> <p>General summer temperature set point post project - unoccupied</p> <p>Hours of Operation (Opening &amp; Closing)</p>

## Required Documentation

No Pre-Approval (NPA) Projects or Rebates Less than \$5000	Pre-Approval (PA) Projects or Rebates \$5,000 or more:
<p>W-9 (MOST CURRENT YEAR, SIGNED AND DATED)</p> <p>Proposed Control System</p> <p>Equipment to be Controlled</p> <p>Energy Study</p> <p>Dated Invoice showing equipment installed, may be listed as a lump sum</p> <p>Confirmation of Trained Staff</p>	<p><b>For Pre-Approval:</b></p> <p>W-9 (MOST CURRENT YEAR, SIGNED AND DATED)</p> <p>Proposed Control System</p> <p>Equipment to be Controlled</p> <p>Energy Study</p> <p><b>For Final Approval:</b></p> <p>Dated Invoice showing equipment installed, may be listed as a lump sum</p> <p>Confirmation of Trained Staff</p>
<p><b>Upload all documents as one PDF. If you are unable to upload as one PDF:</b></p> <p>Email additional documents to <a href="mailto:businessrebates@oppd.com">businessrebates@oppd.com</a> with Project Number in subject line of email.</p> <p>Submit a message in the Application Dashboard stating that additional documents have been emailed.</p>	

[Sample Documentation](#)

# RETRO-COMMISSIONING

## Retro-Commissioning: Project Requirements, Terms & Conditions & Required Documentation

- [Rebate Combinations](#)
- [Pre-Approval Requirements](#)
- [Rebate Amounts](#)
- [Project Requirements](#)
- [Additional Equipment Fields](#)
- [Required Documentation](#)

### Rebate Combinations

The following rebates CAN be combined with Retro-Commissioning Business Rebate projects:	The following CAN NOT be combined with Retro-Commissioning Business Rebate projects:
ENERGY STAR® Certification	Retro Commissioning ENERGY STAR® Building ENERGY STAR® Portfolio Manager Benchmarking Custom Energy Study HVAC (RTUs, Heat Pumps, Split, Chillers) Lighting and Lighting Controls Advanced Rooftop Unit Controller (ARC) Small to Medium Business (SMB) Direct Install
Rebate Amounts for less than 20,000 sq/ft	Rebate Amounts for less than 20,000 sq/ft
Rebate Minimum: \$100 Rebate Maximum: \$4,000	Building Sq/Ft: less than 20,000 Minimum Conditioned: 1,000 Rebate Per Sq/Ft: \$0.20 Frequency in Years: 10
Rebate Amounts for 20,000 or 300,000 sq/ft	Project Requirements 20,000 or 300,000 sq/ft
Rebate Minimum: \$100 Rebate Maximum: \$30,000	Building Sq/Ft: 20,000 or 300,000 Minimum Conditioned: 10,000 Rebate Per Sq/Ft: \$0.10 Frequency in Years: 10

### Pre-Approval Requirements

- Only Projects over \$5,000

### Rebate Amounts

<b>Retro-Commissioning Rebate Amounts</b>	
Buildings 20,000 and less \$0.20 per sq/ft fully conditioned	\$4,000 Max
Buildings over 20,000, \$0.10 per sq/ft conditioned*	30,000 Max

\*Unconditioned space and heating only space will not be included.

### Project Requirements

1. Building Retro-Commissioning rebate is for existing buildings only.
2. All applications with projected rebate of \$5,000 or greater must be preapproved.
3. Cannot be combined with a Small BMS rebate, BMS rebate or an ENERGY STAR Building rebate.
4. Must be completed by a licensed Professional Engineer or Certified Commissioning Agent/Professional.

5. For the purposes of this rebate Retro-Commissioning also includes Optimization, Re-Commissioning and Continuous Commissioning.
6. Building must be less than 300,000 square feet
7. Rebate will be paid based on square feet of conditioned space (unconditioned space and heating only space will not be included).
8. Building must have a direct digital control system or connected room controllers for spaces 20,000 and less.
9. Mechanical equipment must be in relatively good condition and properly maintained.
10. Buildings are eligible for a maximum of one Retro commissioning project rebate per premise every 10 years.
11. A retro commissioning rebate cannot be applied for If building has received a Small Business BMS Rebate, a BMS Rebate or an ENERGY STAR Building rebate within 10 years.
12. Projected savings in kW, kWh and therms are required to be provided as part of the application process.
13. Control sequence of operation must be provided for building regardless of size
14. Modeling required for buildings over 20,000 square feet
15. Building must be Benchmarked by an approved Trade Ally in Portfolio Manager, the EPA's free benchmarking tool, and the ENERGY STAR score reported as part of the application process.
16. Savings must be deemed to be sustainable for a period of five years. In order to complete this requirement, the ENERGY STAR rating/Portfolio Account Tracking needs to be maintained for a period of three years by the customer or the Trade Ally (OPPD may also provide this service at a nominal cost to the customer and customer must agree to provide gas or other, non-electric, utility data proactively to OPPD for the three-year duration). However, this tracking must be determined prior to any payment being made.
17. OPPD must be granted Portfolio Manager viewing rights to the building to confirm the score and for a period of up to three years post rebate payment\*.
18. If building ownership changes and the party responsible for paying the OPPD bill at the building changes within the three year follow up period the benchmarking requirement will no longer be enforced however OPPD will continue to have the right to monitor OPPD bills for the three year duration.
19. For buildings with over 20,000 square feet of conditioned space the following documentation is required:
  - d) Control System: Submit a detailed scope of work that includes the following information as applicable:
    - A list of existing and new control points, including all AO, AI, DO and DI.
    - A list or cut sheets of existing controls hardware and new controls hardware to be installed.
    - Sequences of operation.
    - If available, provide controls diagrams.
    - Provide both material and labor costs to implement the proposed control strategies.
  - e) Equipment to be Retro-Commissioned: Submit documentation of the existing equipment that is being controlled by the existing BMS including:
    - Mechanical schedules, drawings or other technical information for the Air Handlers, Chillers, Pumps, Cooling Towers, Heat Exchangers and other equipment, that includes the capacities, flow rates, etc.,
  - f) Energy Study: An engineering analysis of the estimated energy savings based on implementation of the proposed measure. Use the existing system operation as the baseline.
    - In cases where a project includes multiple ECMs, the engineering analysis must ensure the interactive effects of energy savings measures are accounted for and do not overlap. For example, if one measure is time of day shutdown, and the next measure is static pressure reset, the baseline energy consumption for the static pressure reset measure shall use the reduced hours of time-of-day shutdown.
20. Retro Commissioning rebate amount will be \$.20 per square feet of conditioned space for buildings less than 20,000 square feet and with a rebate limit of \$4,000 and \$.10 per square feet for buildings 20,000 to 300,000 square feet and less and with a rebate limit of \$30,000 per building.
21. Project completion for rebates over \$5,000 shall be within twelve (12) months of OPPD preapproval and invoice must arrive within one (1) month of completion in order for rebate funding to be available. Any invoice arriving over this time limit may no longer be funded.
22. Projects committed to or completed prior to November 1, 2024 do not qualify for this rebate.

## Application Equipment Fields

Retro-Commissioning
<p>QUANTITY</p> <p>BUILDING SQUARE FOOTAGE</p> <p>CONDITIONED SPACE SQUARE FOOTAGE</p> <p>YEAR BUILT</p> <p>TOTAL PROJECT COST</p> <p>NAME OF CERTIFIED COMMISSIONING AGENT/PROFESSIONAL OR PROFESSIONAL ENGINEER</p> <p>LICENSE NUMBER</p> <p>ENERGY STAR PORTFOLIO MANAGER SCORE BEFORE INSTALLATION</p> <p>KW PEAK DEMAND BEFORE RETRO-COMMISSIONING</p> <p>12 MONTHS KWH USAGE BEFORE RETRO-COMMISSIONING</p> <p>12 MONTHS THERM USAGE BEFORE RETRO-COMMISSIONING</p> <p>PROJECTED ANNUAL SAVINGS KW</p> <p>PROJECTED ANNUAL SAVINGS KWH</p> <p>PROJECTED ANNUAL SAVINGS THERMS</p> <p>BMS MANUFACTURER</p> <p>BMS MODEL</p> <p>WHO WILL BE MAINTAINING ENERGY STAR SCORE IN PORTFOLIO MANAGER</p> <p>TRADE ALLY</p> <p>CUSTOMER</p> <p>OPPD</p> <p>HAS PORTFOLIO MANAGER VIEWING PRIVILEGES BEEN GRANTED TO OPPD</p> <p>YES</p> <p>NO</p> <p><b>ADDITIONAL EQUIPMENT INFORMATION</b></p> <p>General summer temperature set point pre-project - occupied</p> <p>General summer temperature set point pre-project - unoccupied</p> <p>General summer temperature set point post project - occupied</p> <p>General summer temperature set point post project - unoccupied</p> <p>Hours of Operation (Opening &amp; Closing)</p>

## Required Documentation

No Pre-Approval (NPA) Projects or Rebates Less than \$5000	Pre-Approval (PA) Projects or Rebates \$5,000 or more:
<p>W-9 (MOST CURRENT YEAR, SIGNED AND DATED)</p> <p>Detailed Scope of Work</p> <p>Equipment to be Retro Commissioned</p> <p>Energy Study</p> <p>Dated Invoice showing itemized equipment installation and commission services as provided, may be listed as a lump sum.</p> <p>Confirmation of Trained Staff</p>	<p><b>For Pre-Approval:</b></p> <p>W-9 (MOST CURRENT YEAR, SIGNED AND DATED)</p> <p>Detailed Scope of Work</p> <p>Equipment to be Retro Commissioned</p> <p>Energy Study</p> <p><b>For Final Approval:</b></p> <p>Dated Invoice showing itemized equipment installation and commission services as provided, may be listed as a lump sum.</p> <p>Confirmation of Trained Staff</p>
<p><b>Upload all documents as one PDF. If you are unable to upload as one PDF:</b></p> <p>Email additional documents to <a href="mailto:businessrebates@oppd.com">businessrebates@oppd.com</a> with Project Number in subject line of email.</p> <p>Submit a message in the Application Dashboard stating that additional documents have been emailed.</p>	

[Sample Documentation](#)

# ENERGY STAR® PORTFOLIO MANAGER BENCHMARKING

## ENERGY STAR® Portfolio Manager Benchmarking: Project Requirements, Terms & Conditions & Required Documentation

[Rebate Combinations](#)

[Pre-Approval Requirements](#)

[Rebate Amounts](#)

[Project Requirements](#)

[Application Equipment Fields](#)

[Required Documentation](#)

### Rebate Combinations

The following rebates CAN be combined with ENERGY STAR® Portfolio Manager Benchmarking Rebate projects:	The following CAN NOT be combined with ENERGY STAR® Portfolio Manager Benchmarking Business Rebate projects:
ENERGY STAR® Building Custom Energy Study Lighting and Lighting Controls HVAC (RTUs, Heat Pumps, Split, Chillers) Advanced Rooftop Unit Controller (ARC)	ENERGY STAR® Certification Building Management System (BMS) Small Management Systems (SBMS) Retro-Commissioning ENERGY STAR® Certification Small to Medium Business (SMB) Direct Install
Rebate Amounts	Project Requirements
Rebate Minimum: \$100 Rebate Maximum: \$500	Building Sq/Ft: N/A Minimum Conditioned: N/A Project Cost %: 100 Rebate Per Sq/Ft: N/A Further Defined: Whichever Is Less Frequency in Years: 5

### Pre-Approval Requirements

- N/A: No Pre-Approval Required, regardless of cost

### Rebate Amounts

ENERGY STAR® Portfolio Manager Benchmarking	
Rebate Amounts	
Actual Cost of the benchmark with a not to exceed amount of	\$500

### Project Requirements

1. Can only receive one rebate per building every 5 years.
2. A building cannot receive both a Benchmarking and ENERGY STAR Building, Retro Commissioning, Small BMS or BMS rebate within 5 years.
3. A building cannot receive the ENERGY STAR Benchmarking rebate AND the ENERGY STAR Certification Rebate in the same calendar year.
4. Building must be benchmarked in ENERGY STAR Portfolio Manager, the EPA's free benchmarking tool, by an approved Trade Ally or a company representative who has completed Portfolio Manager Training, also provided free by the EPA's ENERGY STAR program (Portfolio Manager 101, 102).
5. The ENERGY STAR score received must be reported as part of the application process.
6. OPPD must be granted [Portfolio Manager viewing rights](#) to the building to confirm score.
7. Rebate maximum will be \$500 and may cover up to 100% of the cost of the benchmark.
8. Benchmarking committed to or completed prior to November 1, 2024, do not qualify for this rebate.

## Application Equipment Fields

ENERGY STAR® Portfolio Manager Benchmarking
QUANTITY
BUILDING SQUARE FOOTAGE
CONDITIONED SPACE SQUARE FOOTAGE
YEAR BUILT
TOTAL PROJECT COST
ENERGY STAR PORTFOLIO MANAGER SCORE
INVOICE AMOUNT
CURRENT KW PEAK DEMAND
12 MONTHS KWH USAGE
12 MONTHS THERM USAGE
HAS PORTFOLIO MANAGER VIEWING PRIVILEGES BEEN GRANTED TO OPPD
YES
NO

## Required Documentation

No Pre-Approval (NPA) for ENERGY STAR® Portfolio Manager Benchmarking
Dated Invoice showing cost of benchmarking of performed by a Trade Ally. If performed by a company representative the name of the individual must be uploaded with a request for the rebate amount to cover their labor with a not to exceed amount of \$500.00.  Proof of Score (screen shot of Score or kBtu per square foot).
<b>Upload all documents as one PDF. If you are unable to upload as one PDF:</b> Email additional documents to <a href="mailto:businessrebates@oppd.com">businessrebates@oppd.com</a> with Project Number in subject line of email. Submit a message in the Application Dashboard stating that additional documents have been emailed.

[Sample Documentation](#)

# ENERGY STAR® BUILDING

## ENERGY STAR® Building: Project Requirements, Terms & Conditions & Required Documentation

[Rebate Combinations](#)

[Pre-Approval Requirements](#)

[Rebate Amounts](#)

[Project Requirements](#)

[Application Equipment Fields](#)

[Required Documentation](#)

### Rebate Combinations

The following rebates CAN be combined with ENERGY STAR® Building Business Rebate projects:	The following CAN NOT be combined with ENERGY STAR® Building Business Rebate projects:
ENERGY STAR® Portfolio Manager Benchmarking ENERGY STAR® Certification	Building Management System (BMS) Small Management Systems (SBMS) Retro-Commissioning Custom Energy Study Lighting and Lighting Controls HVAC (RTUs, Heat Pumps, Split, Chillers) Advanced Rooftop Unit Controller (ARC) Small to Medium Business (SMB) Direct Install
Rebate Amounts	Project Requirements
Rebate Minimum: \$100 Rebate Maximum: \$40,000	Building Sq/Ft: As Applicable Minimum Conditioned: N/A Rebate Per Sq/Ft: \$0.25-0.75 Further Defined: Whichever Is Less Frequency in Years: 10

### Pre-Approval Requirements

- N/A: No Pre-Approval Required, regardless of cost

### Rebate Amounts

ENERGY STAR Building Rebate Amounts	
Based on ENERGY STAR Portfolio Manager Score and ranges from \$.25 to \$.75 per sq/ft fully conditioned	up to \$40,000

### Project Requirements

1. ENERGY STAR Building rebate is for existing buildings only.
2. While ENERGY STAR Building rebates do not need to be pre-approved, OPPD will carefully review each application to ensure no other rebates have been paid at the building which would result in paying for energy efficiency and demand reduction results more than once.
3. If the projects completed to attain ENERGY STAR Building status qualify for another prescriptive rebate, those rebates must be applied for in lieu of the ENERGY STAR Building Rebate.
4. Must have previously received the ENERGY STAR Benchmarking Rebate and initial score as provided for that rebate must be less than 75. Can't have ever achieved ENERGY STAR status!
5. Initial score must be submitted from Benchmarking Rebate and rebate paid prior to any submission for an ENERGY STAR Building Rebate. Initial score must be below 75 in order to qualify for this rebate. Meaning if

the score comes back over 75 you will get the benchmark rebate and would qualify for the certification rebate but not the energy star building rebate.

6. May be combined with ENERGY STAR Certification rebate.
7. Building must have attained ENERGY STAR Status before application for rebate but after program introduction of January 1, 2025.
8. Buildings are disqualified from receiving this rebate if they have ever attained ENERGY STAR building status in a year(s) previous to 2025.
9. Buildings are eligible for a maximum of one ENERGY STAR Building rebate per premise every 10 years.
10. An ENERGY STAR Building rebate cannot be applied for if building has received a Small Business BMS Rebate, a BMS Rebate, a Retro Commissioning Rebate or a Custom Project Rebate within 10 years.
11. Building must be Benchmarked by an approved Trade Ally in Portfolio Manager, the EPA's free benchmarking tool, and the ENERGY STAR score reported as part of the application process.
12. Savings must be deemed to be sustainable for a period of five years. In order to complete this requirement, the ENERGY STAR rating/Portfolio Account Tracking needs to be maintained for a period of three years by the customer or the Trade Ally (OPPD may also provide this service at a nominal cost to the customer and customer must agree to provide gas or other, non-electric, utility data proactively to OPPD for the three-year duration). This tracking must be determined prior to any payment being made.
13. OPPD must be granted Portfolio Manager viewing rights to the building for a period of up to three years post rebate payment\*.
14. If building ownership changes and the party responsible for paying the OPPD bill at the building changes within the three year follow up period the benchmarking requirement will no longer be enforced however OPPD will continue to have the right to monitor OPPD bills for the three year duration.
15. Energy Star Building rebate amount will be based on the Professional Engineer or Registered Architect verified Portfolio Manager Score. A score of 75 results in a rebate of \$.25 per square feet of conditioned space each point above 75 increases the rebate per square feet by \$.02 with a maximum per square feet of \$.75 for a score of 100. Maximum rebate amount for this rebate is \$40,000.
16. Projects committed to or completed prior to November 1, 2024 do not qualify for this rebate.

\*12 - This is done to ensure savings results are sustainable for five years and is intended to assist the customer by not requiring they proactively provide that information each year.

### Application Equipment Fields

ENERGY STAR® Building
QUANTITY
BUILDING SQUARE FOOTAGE
CONDITIONED SPACE SQUARE FOOTAGE
YEAR BUILT
TOTAL PROJECT COST
ENERGY STAR PORTFOLIO MANAGER SCORE
CURRENT KW PEAK DEMAND
12 MONTHS KWH USAGE
12 MONTHS THERM USAGE
BMS MANUFACTURER
BMS MODEL
WHO WILL BE MAINTAINING ENERGY STAR SCORE IN PORTFOLIO MANAGER
HAS PORTFOLIO MANAGER VIEWING PRIVILEGES BEEN GRANTED TO OPPD
<b>ADDITIONAL EQUIPMENT INFORMATION</b>
General summer temperature set point pre-project - occupied
General summer temperature set point pre-project - unoccupied
General summer temperature set point post project - occupied
General summer temperature set point post project - unoccupied
Hours of Operation (Opening & Closing)



## Required Documentation

### No Pre-Approval (NPA) for ENERGY STAR® Building

W-9 (MOST CURRENT YEAR, SIGNED AND DATED)

List of energy related projects and invoices showing energy efficiency measures completed since receiving Benchmarking Score and Rebate.

Mechanical and lighting equipment schedule(s) (HVAC, lighting, etc.)

Control sequence of operation presently being utilized by the BMS

Documentation of how Staff is Trained on the existing systems to ensure energy savings in maintained or improved.

#### **Upload all documents as one PDF. If you are unable to upload as one PDF:**

Email additional documents to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with Project Number in subject line of email.

Submit a message in the Application Dashboard stating that additional documents have been emailed.

[Sample Documentation](#)

## ENERGY STAR® Certification: Project Requirements, Terms & Conditions & Required Documentation

[Rebate Combinations](#)

[Pre-Approval Requirements](#)

[Rebate Amounts](#)

[Project Requirements](#)

[Application Equipment Fields](#)

[Required Documentation](#)

### Rebate Combinations

The following rebates CAN be combined with ENERGY STAR® Certification Business Rebate projects:	The following CAN NOT be combined with ENERGY STAR® Certification Business Rebate projects:
Building Management System (BMS) Small Management Systems (SBMS) Retro-Commissioning Energy Study Lighting and Lighting Controls HVAC (RTUs, Heat Pumps, Split, Chillers) Advanced Rooftop Unit Controller (ARC) Custom	ENERGY STAR® Portfolio Manager Benchmarking Small to Medium Business (SMB) Direct Install

Rebate Amounts	Project Requirements
Rebate Minimum: \$100 Rebate Maximum: \$500	Building Sq/Ft: 5,000 Minimum Conditioned: N/A Project Cost %: 50 Rebate Per Sq/Ft: N/A Further Defined: Whichever Is Less Frequency in Years: 1

### Pre-Approval Requirements

- N/A: No Pre-Approval Required, regardless of cost

### Rebate Amounts

ENERGY STAR Certification	
Rebate Amounts	
50% of the cost of the Certification with a not to exceed amount of	\$500

### Project Requirements

1. The ENERGY STAR Certification Rebate amount will be up to 50% of the cost of the ENERGY STAR Certification with a not to exceed amount of \$500 per building per calendar year.
2. ENERGY STAR Certification must be applied for by a qualified industry professional.
3. Rebate must be applied for, and invoice uploaded within 120 days of invoice date.
4. Building must attain ENERGY STAR status in order to qualify for this rebate.
5. A building cannot receive the ENERGY STAR Certification rebate AND the ENERGY STAR Benchmarking Rebate in the same calendar year.

## Application Equipment Fields

ENERGY STAR® Certification
QUANTITY
ENERGY STAR CERTIFICATION COST
ENERGY STAR SCORE
YEAR BUILT
BUILDING SQUARE FOOTAGE
WAS THIS BUILDING PREVIOUSLY ENERGY STAR CERTIFIED
YES
NO

## Required Documentation

No Pre-Approval (NPA) for ENERGY STAR® Certification
W-9 (MOST CURRENT YEAR, SIGNED AND DATED)
Dated Invoice
Signed Copy of the ENERGY STAR Certification Application
<b>Upload all documents as one PDF. If you are unable to upload as one PDF:</b> Email additional documents to <a href="mailto:businessrebates@oppd.com">businessrebates@oppd.com</a> with Project Number in subject line of email. Submit a message in the Application Dashboard stating that additional documents have been emailed.

[Sample Documentation](#)

# ENERGY STUDY

## ENERGY Study: Project Requirements, Terms & Conditions & Required Documentation

- [Rebate Combinations](#)
- [Pre-Approval Requirements](#)
- [Rebate Amounts](#)
- [Project Requirements](#)
- [Application Equipment Field](#)
- [Required Documentation](#)

### Rebate Combinations

The following rebates CAN be combined with Energy Study Business Rebate projects:	The following CAN NOT be combined with Energy Study Building Business Rebate projects:
ENERGY STAR® Portfolio Manager Benchmarking ENERGY STAR® Certification Custom	Building Management System (BMS) Small Management Systems (SBMS) Retro-Commissioning ENERGY STAR® Building Lighting & Lighting Controls HVAC (RTUs, Heat Pumps, Split, Chillers) Advanced Rooftop Unit Controller (ARC) Small to Medium Business (SMB) Direct Install

Rebate Amounts	Project Requirements
Rebate Minimum: \$100 Rebate Maximum: \$5,000	Building Sq/Ft: N/A Minimum Conditioned: N/A Project Cost %: 50 Rebate Per Sq/Ft: N/A Further Defined: Whichever Is Less Frequency in Years: Varies

### Pre-Approval Requirements

- N/A: No Pre-Approval Required, regardless of cost

### Rebate Amounts

Energy Study Rebate Amounts	
50% of the cost of the Study with a not to exceed amount of	\$10,000

### Project Requirements

1. The Energy Study rebate is exclusively for CUSTOM PROJECTS and cannot be combined with any other rebate.
2. In order to receive this rebate the customer must have committed in writing to moving forward with a CUSTOM PROJECT as shown within the ENERGY STUDY.
3. The CUSTOM REBATE PROJECT NOTIFICATION FORM must be provided to OPPD by the Trade Ally and both OPPD and the Trade Ally must approve that form prior to the submission of any Energy Study rebate.
4. An Energy Study rebate is NOT a prerequisite to qualify for a Custom Rebate. Meaning you may still apply for a Custom Project rebate without applying for an Energy Study Rebate.
5. 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.
6. Only one Energy Study Rebate per building per calendar year.

### Application Equipment Fields

### Energy Study (Found under Custom Rebate)

QUANTITY  
TYPE OF CUSTOM PROJECT (select from drop down menu)  
Envelope  
Other  
Control System/Commissioning  
HVAC  
Motors  
Compressed Air  
DESCRIPTION  
LIFE OF MEASURE  
PROJECTED TOTAL ENERGY SAVINGS (%)  
PROJECTED PEAK DEMAND REDUCTION (KW) \*  
ELECTRICITY (KWH/YR)  
M&V METHOD  
BASELINE PERIOD START DATE (MM/DD/YYYY)  
PEAK KW DURING BASELINE  
YEAR BUILT  
BUILDING SQUARE FOOTAGE  
ESTIMATED ANNUAL SAVINGS (\$)  
ENERGY STUDY COST  
ESTIMATED SAVINGS REPORT SUBMITTAL DATE

### Required Documentation

#### No Pre-Approval (NPA) for Energy Study

W-9 (MOST CURRENT YEAR, SIGNED AND DATED)

Invoice showing the cost of the Energy Study

Custom Rebate Project Notification Form

Energy Study

Customer commitment to move forward with the custom project.

#### Upload all documents as one PDF. If you are unable to upload as one PDF:

Email additional documents to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with Project Number in subject line of email.  
Submit a message in the Application Dashboard stating that additional documents have been emailed.

[Sample Documentation](#)

# SMALL AND MEDIUM-SIZED BUSINESS (SMB) DIRECT INSTALL

## Small and Medium-Sized Business Direct Install: Project Requirements, Terms & Conditions &

### Required Documentation

- [Rebate Combinations](#)
- [Pre-Approval Requirements](#)
- [Rebate Amounts](#)
- [Project Requirements](#)
- [Application Equipment Field](#)
- [Required Documentation](#)

### Rebate Combinations

The following rebates CAN be combined with SMB Direct Install Business Rebate projects:	The following CAN NOT be combined with SMB Direct Install Business Rebate projects:
Small Management Systems (SBMS) Lighting & Lighting Controls HVAC (RTUs, Heat Pumps, Split, Chillers) Advanced Rooftop Unit Controller (ARC)	Retro-Commissioning ENERGY STAR® Building ENERGY STAR® Portfolio Manager Benchmarking ENERGY STAR® Certification Custom

### Rebate Amounts

- Lighting & Lighting Controls: Up to \$1,500
- HVAC (RTUs, Heat Pumps, Split, Chillers): Up to \$2,500
- Advanced Rooftop Unit Controller (ARC): Up to \$1,000
- Small Management Systems (SBMS): Up to \$1,000
- Comprehensive Level 2 Energy Assessment: Up to \$1,500

### Pre-Approval Required

- N/A: No Pre-Approval Required, regardless of cost

### Rebate Amounts

SMB Direct Installation Rebate	
Measure Installation Labor Rebate	Rebate Amount
Lighting Upgrades	70% up to \$1,500
HVAC Upgrades	70% up to \$2,000
Small Building Management System Installation	70% up to \$1,000
ARC installation	70% up to \$1,000

### SMB Direct Install Energy Audit Rebate

Energy Audit Level	Rebate Amount
Comprehensive Level 2 Energy Assessment	50% up to \$1,500

### Qualifications for Program

Participant must be an OPPD business customer **on Rate 230 or 231 and have an annual peak demand equal to or less than 100kW**. Pres-screening for customer's eligibility will be conducted. Customer must also have OPPD account(s) in good standing. OPPD will exercise its right to limit rebate on any building or project to ensure that kW and kWh results are not counted twice.

## Prescriptive Rebate Project Requirements

1. Projects receiving rebates less than \$5,000 should be completed before applying for any rebate and must be applied for within 120 days of invoice date.
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 project for a facility provided the calendar year total is less than \$100,000). Specific project rebate limits are shown in the Project Requirements.
4. OPPD reserves the right to limit any prescriptive equipment rebate (HVAC, ARC and Lighting), payment to not exceed 50% of the total material/equipment cost for the project.
5. Custom projects are not eligible for the SMB Direct Install rebate program.

## Additional Rebate Project Requirements- Small to Medium Business (SMB) Direct Install

1. This rebate is for existing buildings only
2. This is a rebate program for **labor installation cost** for energy-efficient measures upgrades.
3. This rebate must be combined with at least one of the following OPPD Business Rebates:
  - Lighting and Lighting Controls
  - HVAC/Chiller/Heat Pump
  - Advanced Rooftop Unit Controller (ARC)
  - Small Business Building Management System (BMS)
4. Customers who are part of a national chain or franchise may only participate with a maximum of 3 premises per calendar year.
6. Each business owner may only participation with a maximum of 3 premises per calendar year.
7. Each interested customer must request a free energy audit via OPPD website.
8. A free energy audit must be completed and at least one identified energy efficiency measure installed prior to applying for this rebate.
9. Energy-efficient measure(s) installed MUST be measure(s) identified in the energy audit report.
10. Installation must be carried out by an OPPD Trade Ally. Only OPPD Trade Allies can apply for rebates as part of this program.
- 11. Business Rebate(s) applications must be submitted prior to applying for this rebate.**
12. Free (level 1) and Comprehensive (level 2) energy audit can ONLY be conducted and completed by an OPPD Trade Ally which has been approved to submit custom project application in addition to fulfilling and completing the requirements in the statement of work (SOW) with OPPD.
13. All Terms and Conditions and Project Requirements for the accompanying energy efficiency measures must be followed on order to qualify for this rebate.
14. Projects committed to or completed prior to November 18<sup>th</sup>, 2024, do not qualify for this rebate.

## Project Requirements- Small to Medium Business (SMB) Energy Audit Rebate

1. This rebate is for existing buildings only
2. This rebate is for a comprehensive (Level 2) energy audit which must be completed prior to any energy-efficient measure upgrades.
3. To qualify for this rebate the following must be completed:
  - a. Free (Level 1) energy audit
  - b. Comprehensive (Level 2) energy audit
  - c. Customer would need installation of at least one identified measure from the level 2 audit. A customer agreement for installation would be required.
4. Customers who do not proceed with the installation of at least one of the recommended energy-efficient measures are not eligible to receive this rebate and may have to pay in full for the level 2 energy audit.
5. Customers can receive the SMB Direct Install Rebate and Business Rebate(s) in addition to this rebate, subject to both programs' T&Cs.
6. This rebate must be combined with at least one of the following OPPD Business Rebates:
  - Lighting and Lighting Controls
  - HVAC/Chiller/Heat Pump
  - Advanced Rooftop Unit Controller (ARC)

- Small Business Building Management System (BMS)
- Customers who are part of a national chain or franchise may only participate with a maximum of 3 premises per calendar year.
  - Each business owner may only participation with a maximum of 3 premises per calendar year.
  - Each interested customer must request a free energy audit via OPPD website.
  - Energy-efficient measures installed HAS to be at least one of the recommended measures in the energy audit report.
  - Installation works and must be carried out by OPPD Trade Ally. Only OPPD Trade Ally can apply the rebate for this program.
- 12. Business Rebate(s) applications must be submitted prior to applying for this rebate.**
- Free (level 1) and Comprehensive (level 2) energy audit can ONLY be conducted and completed by an OPPD Trade Ally which has been approved to submit custom project application in addition to fulfilling and completing the requirements in the statement of work (SOW) with OPPD.
  - All Terms and Conditions and Project Requirements for the accompanying energy efficiency measures must be followed on order to qualify for this rebate.
  - Projects committed to or completed prior to November 18<sup>th</sup>, 2024, do not qualify for this rebate

**Application Equipment Fields**

Direct Install Rebate
QUANTITY KW PEAK DEMAND LAST 12 MONTHS DATE OF FREE ENERGY AUDIT COMPLETED (MUST BE 11/15/24 AND AFTER) COMPANY THAT COMPLETED THE INSTALLATION TOTAL PROJECT COST LABOR COST DATE OF INVOICE OR INSTALLATION TYPE OF EQUIPMENT INSTALLED LIGHTING HVAC SMALL BMS ARC PRESCRIPTIVE APPLICATION PROJECT #

**Application Equipment Fields**

Energy Audit
QUANTITY KW PEAK DEMAND LAST 12 MONTHS DATE OF FREE ENERGY AUDIT COMPLETED (MUST BE 11/15/24 AND AFTER) COMPANY THAT COMPLETED THE INSTALLATION TOTAL PROJECT COST LABOR COST DATE OF INVOICE OR INSTALLATION *

**Required Documentation**

No Pre-Approval (NPA) for SMB Direct Install
W-9 (MOST CURRENT YEAR, SIGNED AND DATED)  Invoices: Detailed, itemized invoices showing the equipment installed, with an itemized costs associated with materials AND an itemized labor cost.  Energy Assessment Report: An energy audit report that includes the recommendation of the measures that would improve energy efficiency from the free energy walkthrough need to be uploaded.



## No Pre-Approval (NPA) for SMB Direct Install Energy Audit

W-9 (MOST CURRENT YEAR, SIGNED AND DATED)

Invoices: Detailed invoices listing the service and scope associated with energy audit conducted.

Energy Assessment Report: A detailed energy audit report that includes the recommendation of the measures, amount of kW and kWh savings, bill reading and other efforts that would improve energy efficiency from the level 2 energy audit need to be uploaded.

Customer Agreement: A signed and dated customer agreement to follow up with the installation process after the Energy audit will be required for rebate payment processing.

### **Upload all documents as one PDF. If you are unable to upload as one PDF:**

Email additional documents to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with Project Number in subject line of email.

Submit a message in the Application Dashboard stating that additional documents have been emailed.

Upload all documents as one PDF.

If you are unable to upload as one PDF:

1. Email additional documents to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with Project Number in subject line of email.
2. Submit a message in the Application Dashboard stating that additional documents have been emailed.

[Sample Documentation](#)

# TRADE ALLY HUB AND DASHBOARD

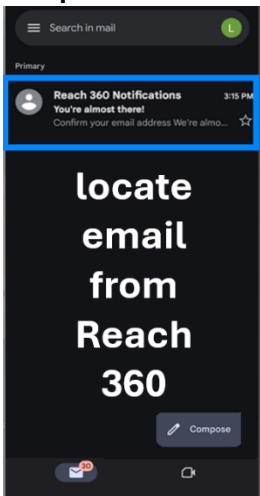
## Create a Trade Ally Account

**Step 1:** Email [businessrebates@oppd.com](mailto:businessrebates@oppd.com) to register for the training course.

Include what pathway or specialty that you would like to complete.

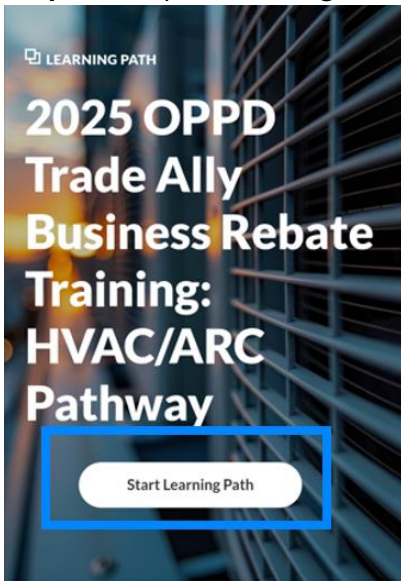
- **Lighting and Lighting Controls-** Includes foundation training on Trade Ally program, applications and best practices, in addition to, a lighting walkthrough and a New Rebates overview.
- **HVAC & ARC-** Includes foundation training on Trade Ally program, applications and best practices, in addition to, a HVAC + ARC walkthrough and a New Rebates overview.
- **New Rebates-** Includes foundation training on Trade Ally program, applications and best practices, in addition to, a New Rebates overview.
- **All Rebates-** Includes foundation training on Trade Ally program, applications and best practices, in addition to, Lighting & Lighting Controls, HVAC+ ARC, Custom & New Rebates.

**Step 2:** Locate the Reach360 email address & verify address



**Step 3:** Create Account (Password, First & Last Name, Preferred Language and Agree to Terms & Conditions)

**Step 4:** Complete Training.



Description

**Step 4:** Email [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with a screenshot of your completion certificate. \*Note: If you are unable to take a screenshot, email [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with your score % located on your completion certificate and to get your account started.



If you lose access to your training access, email [businessrebates@oppd.com](mailto:businessrebates@oppd.com).

# Trade Ally Hub Dashboard

The screenshot shows the Trade Ally Hub Dashboard for the Omaha Public Power District (OPPD). At the top, there is a navigation bar with links for 'My applications', 'Contacts', 'My profile', 'Change password', 'Change email', and 'Logout'. Below this is the OPPD logo and a secondary navigation bar with links for 'RESIDENTIAL', 'BUSINESS', 'OUTAGES', 'ENVIRONMENT', 'NEWS & RESOURCES', 'ABOUT', and 'COMMUNITY'. A third navigation bar contains 'PAY MY BILL', 'REPORT AN OUTAGE', 'OUTAGE INFORMATION', 'START/STOP SERVICE', and 'MYACCOUNT'. The main content area is titled 'My Applications' and includes filters for 'All 3', 'Bookmarked', and 'Incomplete'. A search bar and a 'With to-do tasks' toggle are also present. A table lists applications with columns for Project Number, Project Name, Program Name, Contact, Status, Created, and Actions. One application is shown with a 'Duplicate' button and a right-pointing arrow in the Actions column. A notification bell icon and 'Total payments \$0.00' are in the top right corner.

Project Number	Project Name	Program Name	Contact	Status	Created	Actions
OPCPPS1	OPPD Product Training	Business Rebates	Trey Neen OPPD FACILITIES MGMT ACCOUNT 444 S 16 ST OMAHA, NE 68102-2608	Duplicate	Sep 14, 2024 • 04:26 pm	→

- 1. Home:** Click Apply Now to get the application started.
- 2. Contact Us:** Send an email to OPPD. For questions about a specific application, use the Message Platform within the rebate. To access, double click on the application line and click arrow under Actions column.
- 3. Dashboard:** List of all submitted application, current and completed.
- 4. Project Number:** Every submitted application will have a project number. When communicating with OPPD, list this number in the subject line if sending an email to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) or include in the message, if using the Contact Us link.
- 5. Contact:** Customer contact of the project.
- 6. Application Status:** [Click Here for Full List.](#)
- 7. Application Details:** Click arrow to application details **or** double click the application line.
- 8. Total Payments:** Total payment amount for completed applications.

# Dashboard Application Detail View

The screenshot shows the 'OPPD Product Training' application detail view. At the top, there is a navigation bar with links for 'My applications', 'Contacts', 'My profile', 'Change password', 'Change email', and 'Logout'. Below this is the OPPD logo and a navigation menu with links for 'RESIDENTIAL', 'BUSINESS', 'OUTAGES', 'ENVIRONMENT', 'NEWS & RESOURCES', 'ABOUT', and 'COMMUNITY'. A secondary orange navigation bar contains links for 'PAY MY BILL', 'REPORT AN OUTAGE', 'OUTAGE INFORMATION', 'START/STOP SERVICE', and 'MYACCOUNT'. Below these are links for 'Apply Now', 'Manage Applications', and 'Contact Us'. The main content area shows the application title 'OPPD Product Training' and 'Business Rebates'. A table lists application details: Status (Duplicate), No. (OPCPPS), and Created (Sep 14, 2024 - 04:26 pm). To the right is a 'Premise Contact' card for 'Trey Neen' with email, phone, and address information. A navigation bar at the bottom of the application view includes 'Tasks', 'Inbox & Mail', 'Equipment', 'Forms', 'Files', 'Payments', and 'Contacts', with numbered callouts 1 through 7 highlighting each tab.

- 1. Tasks:** The 'Tasks' tab is a list of tasks submitted by OPPD to be completed by the Trade Ally. An example is 'Upload Document'.
- 2. Inbox & Mail:** The 'Inbox & Mail' tab houses the communication platform between the Trade Ally and OPPD. By clicking the Message Box to submit and send a message to OPPD. Messages from OPPD will be designated with a user name from the OPPD representative. In addition, by clicking the 'Mail Correspondence' box, email communication to and from OPPD will be available to be viewed.
- 3. Equipment:** The 'Equipment' tab has the information entered into the application. The "View" hyperlink on the right side, will display the equipment.
- 4. Forms:** The 'Forms' tab has the information entered into the application. The hyperlink on the right side take to the different portions of the application. Once an application is submitted the information cannot be edited or updated.
- 5. Files:** The 'Files' tab has the uploaded documents as part of the application. Download capabilities are located on the right side.
- 6. Payments:** The 'Payments' tab will show the amount of the rebate and payment processing status.
- 7. Contacts:** The 'Contacts' tab has Premise Contact, Primary Contact and Contractor Contact information.

# Application Walkthrough

**Step 1:** Navigate to [OPPD.com](https://oppd.com) and click **Trade Ally Hub (Central)** & **Step 2:** Click **'Business Rebate Application'**.

<https://oppd-busprescriptive.customerapplication.com/>

The screenshot shows a navigation menu on the left with 'Trade Ally Hub' highlighted. The main content area displays two circular gauges: 'Current Solar Rebates Available \$XXX,XXX' and 'Current Business Rebates Available \$XXX,XXX', both showing 'XX%' completion. Below the gauges are two buttons: 'Business Rebate Application' (highlighted with a blue box) and 'Begin Solar Application'. Text below the gauges states '\*Funds available as of May 1st, 2023'. At the bottom, a text block explains that every custom project must be preapproved and provides the email [BusinessRebates@oppd.com](mailto:BusinessRebates@oppd.com) for more information.

**Step 3:** Click the orange **Begin Application** box to start the process.

The screenshot shows the OPPD logo and navigation menu. The main heading is 'BUSINESS REBATES'. Below the heading, there is a welcome message and instructions for users. A list of required information for rebates is provided, including Trade Ally login information, project location, entity name, equipment list, W9, and project invoice. A link is provided for additional documents. At the bottom, a blue box highlights the 'Begin Application' button.

## Step 4: Use Email & Password to Login for Trade Ally Account



RESIDENTIAL | BUSINESS | OUTAGES | ENVIRONMENT | NEWS & RESOURCES | ABOUT | COMMUNITY

PAY MY BILL | REPORT AN OUTAGE | OUTAGE INFORMATION | START/STOP SERVICE | MYACCOUNT

Apply Now | Manage Applications | Contact Us

## Step 5: Enter address as on the OPPD bill.

My applications | Contacts | My profile | Change password | Change email | Logout



RESIDENTIAL | BUSINESS | OUTAGES | ENVIRONMENT | NEWS & RESOURCES | ABOUT | COMMUNITY

PAY MY BILL | REPORT AN OUTAGE | OUTAGE INFORMATION | START/STOP SERVICE | MYACCOUNT

Apply Now | Manage Applications | Contact Us

Thank you for your interest in this program.

Please enter your **street address** exactly as it appears on your OPPD bill. **Do not include the city/state/zip.** If what you enter does not match your OPPD bill exactly, then you will not be able to move forward.

Please [click here](#) for a [bill example](#) to locate the street address.

0311  
Page 1 of 1

Account Number	Due Date	Total Amount Due
1234567890	Jul 9, 2020	\$116.84

For bill inquiries call the Omaha Office (402) 536-4131. See back for toll-free number. Customer Name: BILLPAY, ELECTRA O  
Statement Date: June 19, 2020

Billing Information for service address: 2134 MAIN ST, OMAHA NE

Rate	Billing Period		Meter Number	Meter Reading				Usage	
	From	To		Previous	Present	Difference	Multiplier		
Residential	6-11-20	6-10-20	2127000	56033	56879 Actual	846	1	kWh	846

- 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.

## Step 6: Enter Project Name

The screenshot shows the top navigation bar with links for My applications, Contacts, My profile, Change password, Change email, and Logout. Below is the OPPD logo and a navigation menu with links for RESIDENTIAL, BUSINESS, OUTAGES, ENVIRONMENT, NEWS & RESOURCES, ABOUT, and COMMUNITY. A secondary menu includes PAY MY BILL, REPORT AN OUTAGE, OUTAGE INFORMATION, START/STOP SERVICE, and MYACCOUNT. The main content area is titled 'Project Name' and contains a form with a text input field labeled 'Project Name' and a sub-label 'Name this project \*'. Below the input field are two buttons: 'Continue' and 'Save & Complete Later'.

- 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)

## Step 7: Enter Premise Contact Information. This is the contact at the physical location of project

The screenshot shows the same top navigation and menu as Step 6. The main content area is titled 'Premise Contact' and contains a form with a sub-label 'Premise Contact' and a description: 'Premise Contact is the contact at the physical location of project.' The form includes four text input fields: 'First Name \*', 'Last Name \*', 'Email Address \*', and 'Phone Number \*'. Below the input fields are three buttons: 'Back', 'Continue', and 'Save & Complete Later'.

- **First Name** enter the first name of the customer contact for the project.
- **Last Name** enter the last name of the customer contact for the project.
- **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.
- Enter the **email address** of the customer contact for the project. (NOTE: This is the email where all status emails will be sent.) 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 it says "Select existing contact". NOTE: Do not click on Clear Contact or all information will need to be re-entered.



## Step 8: Enter Payee Information, Contractor Information (includes Tax ID, Name, Address, Contractor)

### Application Information

**Payee Information**

Same as home/business information

Choose existing contact

-- SELECT --

First Name and Last Name or Company Name is Required

First Name	Address *
<input type="text"/>	<input type="text"/>
Last Name	Address (cont)
<input type="text"/>	<input type="text"/>
Company	City *
<input type="text"/>	OMAHA
	State/Province *
	NEBRASKA
	Postal Code *
	68102-2608
	Tax ID *
	<input type="text"/>

Save this as a new contact in my profile contact list

**Trade Ally Information**

\* Required

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.

- 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.
- 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
- Enter the **Tax ID** as shown on the W-9 form 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) 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). 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 it says "Select existing contact".
- NOTE: Do not click on Clear Contact or all information will need to be re-entered.

## Step 9: Enter Project Type and Agree to Terms & Condition.

### Prescriptive Application

#### Project Information

Property Occupied By \*

- Owner  
 Tenant

Project Type \*

Building Type \*

Project Cost Without Rebates \*

#### Terms and Conditions

Please review the [Terms and Conditions](#) and acknowledge below.

I agree to the Terms and Conditions \*

Yes

-OR-

Answer the Project Information questions

- **Property Occupied** By select the applicable option, owner or tenant.
- **Project Type** is a pull-down menu
- **Building Type** is a pull-down menu. Select the type that most accurately represents the building.
- Project Cost without Rebate — enter the total amount expected for the equipment and labor for the entire job.
- Review the **Terms and Conditions** hyperlink.
- Check the **Yes** box if you agree.
- Click Continue.

### Step 10: Enter Equipment.

## Equipment Entry

### Equipment Entry

To add equipment, click "Add Equipment". When finished, click "Continue" to move on to the next section and upload supporting documentation.

No equipment added.

Add Equipment

Back

Continue

-OR-

Save & Complete Later

After Adding **Equipment**, review information before moving to next screen.

- Edit, Delete and Add more Equipment options available.

## Equipment Entry

### Equipment Entry

To add equipment, click "Add Equipment". When finished, click "Continue" to move on to the next section and upload supporting documentation.

Equipment	Quantity	Action
LED Lamp Product Category: General Lighting	200	<a href="#">Edit</a> <a href="#">Delete</a>

Add Equipment

Back

Continue

-OR-

Save & Complete Later

### Step 10: Upload Required Documentation

## Required Supporting Documentation

### Required Supporting Documentation

The following items need action by you. Click each item to complete.

#### Document Upload

W-9 (most current year, signed and dated)

#### Document Upload

Cut Sheets

#### Document Upload

Itemized Paid Invoice or Sales Receipt

Back

Continue

-OR-

Save & Complete Later

# Required Supporting Documentation

## Required Supporting Documentation

The following items need action by you. Click each item to complete.

<b>Document Upload</b> W-9 (most current year, signed and dated) Completed: Oct 14, 2024, 10:23:43 AM	<b>Document Upload</b> Cut Sheets Completed: Oct 14, 2024, 10:23:55 AM	<b>Document Upload</b> Itemized Paid Invoice or Sales Receipt Completed: Oct 14, 2024, 10:24:02 AM
---	--	--

[Back](#) [Continue](#) - OR - [Save & Complete Later](#)

## Step 11: Confirm Potential Payment (based on equipment and rebate amounts)

### Potential Payment

#### Potential Payment

Below is your potential rebate. Please click the *Back* button if any changes are necessary. Otherwise, click *Continue* button.

<b>Equipment Name</b>	<b>Estimated Total Incentive</b>
LED Lamp	\$600.00
<b>ESTIMATED TOTAL PROJECT INCENTIVE</b>	<b>\$600.00</b>

[Back](#) [Continue](#) - OR - [Save & Complete Later](#)

### Lighting Project Information

#### Potential Payment

Potential Payment

Measure	Quantity	Incentive
LED Lamp	200	600.00
<b>Total Incentive</b>		<b>\$600.00</b>

#### Lighting Project Information Without Rebates

Project Cost Without Rebates \$9,999.00	Simple Payback Period (years) Without Rebate 27.2
	Return On Investment Without Rebate 3.7%

#### Lighting Project Information With Rebates

Project Cost with Rebates \$9,399.00	Simple Payback Period (years) With Rebate 25.6
	Return on Investment With Rebate 3.9%

#### Lighting Project Information

Total kW Difference 1.6	Total Annual kWh Difference 4,226
Annual CO2 Impact (lbs) 6,339	Total Rebate \$600.00

[Back](#) [Continue](#) - OR - [Save & Complete Later](#)

## Step 12: Complete Application

### Final Step!

#### Final Step!

Please click "Complete Application" button to submit your rebate application.

Applications can take up to 6 weeks to process. You will be notified by email of application status changes.

[Back](#) [Complete Application](#) - OR - [Save & Complete Later](#)

### Application submitted

Project number OPCPPS15:

[Return to Account overview](#)

## Required Documentation for All Rebates

All Rebates Require:

1. A current signed and dated W-9 for the check recipient
2. A dated invoice (with additional information as specified in the T&Cs document)

Additional Required Documents by Project Type

### HVAC, Heat Pumps and Chillers:

- AHRI Certificate (if applicable)
- If the unit does not have an AHRI Certificate, then provide:
  - Chiller Specifications with kW per ton
    - NOTE: Full specifications are not required just documentation of the kW per ton of the applicable unit.
  - HVAC specifications with EER highlighted in yellow.
    - NOTE: Full specifications are not required just documentation of the EER of the applicable unit.

### Lighting, Lighting Controls and Unlisted/Custom Lighting:

- Product sheet(s) showing ENERGY STAR, or DLC certification (as applicable) and lamp model
  - NOTE: Full cut sheets are not required just the portion of the specification showing ENERGY STAR or DLC certification and the lamp used in the project.

### Energy Study:

- Custom Project Notification Form
- Copy of the energy study highlighting:
  - Projected energy savings in KW, KWH and THERMS
  - Peak KW used for baseline
  - Baseline M&V dates
- Customer's commitment to implement the project upon OPPD approving the rebate (for an example see sample forms on Trade Ally Hub)

### Custom Project (all projects require preapproval):

- Needed for Preapproval
  - Signed Custom Project Notification Form
  - Energy Study
  - Customer Commitment to move forward
- Needed for Final Approval
  - Case study/energy savings report (as defined in project requirements) and highlighting energy savings in KW, KWH and THERMS
  - Documentation of customer/staff training
  - Documentation of customer acceptance that project has been completed

### Small Business Building Management System (BMS) (all rebates over \$5,000 require preapproval)

- Controls cut sheet verifying compliance
- Confirmation of trained staff

### Building Management System (BMS) (all rebates over \$5,000 require preapproval):

- Needed for Preapproval
  - Proposed Control System
  - Equipment to be Controlled
  - Energy Study
- Needed for Final Approval
  - Confirmation of Trained Staff

### Retro Commissioning (all projects over \$5,000 require preapproval):

- Needed for rebates less than \$5,000 (buildings under 20,000 sq/ft)
  - Detailed Scope of work
  - Equipment to be retro-commissioned
  - Energy Study
  - Documentation of customer/staff training
- Needed for Preapproval (buildings over 20,000 sq/ft)
  - Detailed Scope of work
  - Equipment to be retro-commissioned
  - Energy Study
- Needed for Final Approval
  - Confirmation of Trained Staff

**ENERGY STAR Building:**

- List of energy related projects completed to gain the required energy efficiency level and invoices showing energy efficiency measures completed and completion date.
- Mechanical equipment schedule (HVAC, etc.)
- Control sequence of operation presently being utilized by the BMS
- Documentation of how Staff is Trained on the existing systems to ensure energy savings in maintained or improved.

**ENERGY STAR Benchmarking**

- Proof of Score (screen shot of Score or kBTU per square foot).

**ENERGY STAR Certification**

- Signed Copy of the ENERGY STAR Certification Application

**SMALL TO MEDIUM BUSINESS (SMB) Direct Installation (DI)**

- Invoice: Itemized Invoice or Sales Receipt (must itemize labor and equipment costs separately)
- Professional Free Energy Audit Report (Lighting Audit, BMS Specs, etc.) which includes recommendations of energy efficiency retrofit upgrades

**SMALL TO MEDIUM BUSINESS SMB Comprehensive Energy Audit**

- Invoice: Itemized Invoice or Sales Receipt
- Comprehensive (Level 2) Energy Audit Report
- Customer Agreement to follow up with the proposed installation plan after the level 2 energy audit is completed.

## Sample Documentation

[Invoice](#)

[Labor Invoice](#)

[AHRI Certificate](#)

[W-9](#)

[Cut Sheet](#)

[ARC Cut Sheet](#)

[Custom Project Notification Form](#)

[Energy Study](#)

[Customer Commitment to Move Forward](#)

[Confirmation of Trained Staff](#)

[Case Study Report/Custom Rebate Energy Savings](#)

[Customer Acceptance that Project has been Completed](#)

[ENERGY STAR® of Portfolio Manager Benchmarking Score & Sharing](#)

# Invoice

Invoice or statement must appear on all invoice uploads – spreadsheets with pricing, estimates or price quotes are not acceptable.

1. Equipment should be **itemized** with equipment name, quantity and price.
2. Equipment **quantities** listed on invoice must **match** the quantities on the **application**.
3. **Highlight, label, or notate equipment** that are subject to the rebate.

\*Best Practice: Highlight or circle on your documents

The system allow for one document to be uploaded for each required document. When submitting multiple pages for documentation, it is best practice to merge into one PDF and upload as one document. The system allow for one document to be uploaded for each required document.


**If you are unable to upload in one document:**

1. Email additional documents to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with Project Number in subject line of email.
2. Submit a message in the Application Dashboard stating that additional documents have been emailed.



## OPP D Business Rebates INVOICE SUBMISSION CHECKLIST

Equipment invoices are required documentation for rebates. Projects receiving rebates less than \$5,000 should be completed before applying for any rebate and must be applied for within 120 days of invoice date. Project completion for rebates over \$5,000 shall be within three months of OPPD preapproval and invoice must arrive within one (1) month of completion for rebate funding to be available. Take a moment to review the sample invoice using the checklist prior to submission. Failure to submit a correct invoice, may cause a delay in rebate disbursement or denial of rebate.



Electric Supply Co  
123 Main St  
Omaha, NE 68100

Invoice or statement must appear on all invoice uploads. Spreadsheets with pricing, estimates or price quotes are not acceptable

**Sample INVOICE**

Invoice Date	Invoice Number
6MAY2024	000123PRB
<b>Return To:</b> Electric Supply Co PO Box 5675309 Omaha, NE 68100	Total Due:
US Tax ID 12-123456789	

ORDER QTY	DESCRIPTION	UNIT PRICE	TOTAL PRICE
20	ABC-321-ZYZ-546 12K LUMEN DIE CAST HIGHBAY	39.95	799.00
Equipment should be <b>itemized</b> with equipment name, quantity and price.			
11	ABC-789-ZYZ-654 4x6 LED LIGHTING FROSTED TYPE LB	39.95	439.45
Equipment <b>quantities</b> listed on invoice must <b>match</b> the quantities on the <b>application</b> .			
20	EURI-135-WWW-246 150 WF 200K LED UFO DLC DIM	75.95	1519.00
Highlight, label, or notate equipment that are subject to the rebate.			

Upload all invoice documents as one PDF. If you are unable to upload:

1. Email additional documents to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with Project Number in subject line of email.
2. Submit a message in the Application Dashboard stating that additional documents have been emailed.

Messages and Correspondence

No messages yet

Send Message

# INVOICE

All lights Inc  
LINCOLN, NE 68542-2159

SHIP TO:  
OMAHA, NE 68132-2114

**INVOICE**

SPC NUMBER	INVOICE DATE	INVOICE NO.
000000	9-30-24	
	P.O. NO.	PAGE #
	COMMING RETROP IT	1
	REFERENCE	

BILL TO:  
OMAHA, NE 68132-2114

For Questions Regarding Your Order, Please Call ...  
402

LINE NO.	PRODUCT AND DESCRIPTION	QUANTITY ORDERED	QUANTITY SHIPPED	UNIT PRICE	AMOUNT (NET)
1	1105 9.18.24 0001SP340L8C3ALW00M DAY 120P350L8C3-4-10W- DIM 1X4' LED PANEL *** MATT DELIVERED LINE COMPLETE TO HILLER ON 8/12 ***	2		65.79	131.58
2	REYNOLDED404P350L8C3ALW00M KT-GAL544P35-4-8C3A-10W0M *** PHBC DELIVERED LINE COMPLETE ON 8/7 ***	32		114.54	3665.28
3	0001SP350L8C3ALW00M DAY 250P350L8C3-4-10W- DIM 2X4' LED PANEL *** PHBC DELIVERED LINE COMPLETE ON 8/6 ***	59		60.41	3564.19
4	0001SP350L8C3ALW00M DAY 250P350L8C3-4-10W- DIM 2X4' LED PANEL *** PHBC DELIVERED LINE COMPLETE ON 8/6 ***	20		60.41	1208.20
5	000FPENB13100W DAY FP0KLE100W 10W EMERGENCY KIT *** PHBC DELIVERED 14 EACH ON 8/6 ***	17		159.21	2706.57
6	SAT6559791 SAT 65-59791 234 YTRFRM 12W: 04507555647	11		53.06	583.66

# APPLICATION

Application	Quantity	Date
Aug 15, 2024, 11:20 AM	32	
Aug 15, 2024, 11:19 AM	2	
Aug 15, 2024, 11:19 AM	20	
Aug 15, 2024, 11:18 AM	59	






## Labor Invoice

Invoice or statement must appear on all invoice uploads – spreadsheets with pricing, estimates or price quotes are not acceptable.

1. Equipment should be **itemized** with equipment name, quantity and price.



### INVOICE

<b>NO.</b>		<b>WORK DATE</b>	11/2/2023	<b>CUST. ORDER NO.</b>	
<b>INV. DATE</b>	11/22/2023	<b>S.O. #</b>		<b>DATE DUE</b>	12/22/2023

**SOLD TO:**

Omaha, NE 68102

**JOB#** Service#1      **JOB NAME & LOCATION**

Omaha, NE 68105

QUANTITY	DESCRIPTION	AMOUNT
	LIGHTING RETROFIT: SUPERIOR IS RETROFITTING ALL OF THE : STORES. EXCEPT THE WAREHOUSE. WE ARE ADDING (7) EXTERIOR FIXTURES USING PRE-EXISTING POWER. ALL NEW TUBES REQUIRE BALLAST BYPASS. SUPERIOR IS PROVIDING ALL OF THE LADDERS, AND RECYCLING FOR THIS JOB.	
170	LED15T8L4l	\$ 1,458.60
	Labor to install	\$ 2,975.00
10	LED15T8	\$ 208.30
	Labor to install	\$ 210.00
4	LED32T8L	\$ 272.00
	Labor to install	\$ 210.00
1	Non-Rebatable Material	\$ 1,410.17
1	Non-Rebatable Labor	\$ 389.50
	Quoted Labor	\$ 3,784.50
	Quoted Material	\$ 3,349.07
	Tax	\$ 234.43
	<b>Project Total</b>	<b>\$ 7,368.00</b>
	<b>Less Rebate</b>	<b>\$ (552.00)</b>
	<b>PLEASE PAY THIS AMOUNT</b>	<b>\$ 6,816.00</b>

1 **Highlight or notate labor costs**

LIGHTING \* SIGN ERECTION \* SIGN SERVICE \* ELECTRICAL \* LIGHTING RETROFITS \* LAMP & BALLAST SALES

## AHRI Certificate

Only submit **cut sheets** for equipment that aligns or **matches the invoice and application.**

Equipment on AHRI certificate must match the application

Include **Product Type, Brand Name, Model #**

Highlight or Circle the **Certificate Number**



# OPPDP Business Rebates AHRI CERTIFICATE CUT SHEET SUBMISSION CHECKLIST

Submit equipment that aligns or **matches the invoice and application.**

## 1 INVOICE

- Equipment should match equipment on AHRI Certificate and application

**AHRI CERTIFIED**  
www.ahridirectory.org

### Certificate of Product Ratings

AHRI Certified Reference Number : 208142046    Date : 05-10-2024    Model Status : Active  
Old AHRI Reference Number :  
Brand Name : Valent  
Product Type : Wheel  
Model Number : VXE-212-52B

Ratings generated using the following shall be in accordance with the latest edition of AHRI Standard 1090-2018 (I-P) Performance Rating of Air-to-Air Exchangers for Energy Recovery Ventilation Equipment and are subject to rating accuracy by AHRI-sponsored, independent, third-party testing.  
Selection Software Name : CAPS  
Selection Software Version : 4.43

**AHRI CERTIFIED**  
www.ahridirectory.org

"Active" Model Status are those that an AHRI Certification Program Participant is currently producing AND selling or offering for sale, OR new models that are being marketed but are not yet being produced. "Production Stopped" Model Status are those that an AHRI Certification Program Participant is no longer producing BUT is still selling or offering for sale.  
**Model that are accompanied by WAP indicate an inventory re-rate. The new published rating is shown along with the previous (i.e. WAP) rating.**

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**CERTIFICATE VERIFICATION**  
The information for the model cited on this certificate can be verified at [www.ahridirectory.org](http://www.ahridirectory.org), click on "Verify Certificate" link and enter the AHRI certified reference number and the date on which the certificate was issued, which is listed above, and the certificate no., which is listed at bottom right.

©2024 Air-Conditioning, Heating, and Refrigeration Institute

**CERTIFICATE NO.:** 533615541

## 2 PRODUCT INFORMATION

- Product Type
- Brand Name
- Model #

## 3 CERTIFICATE

- Certificate #

Upload all documents as one PDF. If you are unable to upload:

1. Email additional documents to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with Project Number in subject line of email.
2. Submit a message in the Application Dashboard stating that additional documents have been emailed.

## W-9

The OPPD Business Rebate requires a completed and signed W-9 form for the person or entity receiving the rebate check. Take a moment to review the sample W-9, prior to submission. Ensure the 4 items listed below are completed and included on the W-9. Failure to submit a completed W-9 form, may cause a delay in rebate disbursement or denial of rebate.

Submit the W-9 current year version (2024) [IRS.gov](https://www.irs.gov)

Include Business Name, as filed with the IRS

EIN is entered, legible and matches the Business

W9 is signed and dated



## OPP D Business Rebates W-9 SUBMISSION CHECKLIST

- The OPPD Business Rebate requires a completed and signed W-9 form for the person or entity receiving the rebate check.
- Take a moment to review the sample W-9, prior to submission. Ensure the 4 items listed below are completed and included on the W-9.
- Failure to submit a completed W-9 form, may cause a delay in rebate disbursement or denial of rebate.

1

Submit the W-9 current year version (2024) [IRS.gov](https://www.irs.gov)

**W-9**  
Form (Rev. March 2024)  
Department of the Treasury  
Internal Revenue Service

**Request for Taxpayer  
Identification Number and Certification**

Go to [www.irs.gov/FormW9](https://www.irs.gov/FormW9) for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

**Before you begin.** For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

**1** Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

**Business Name- as filed with the IRS**

**2** Business name/disregarded entity name, if different from above.

**3a** Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor     C corporation     S corporation     Partnership     Trust/estate

LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership).  
**Note:** Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

Other (see instructions)

**3b** If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions.

**4** Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) \_\_\_\_\_

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) \_\_\_\_\_

(Applies to accounts maintained outside the United States.)

**5** Address (number, street, and apt. or suite no.). See instructions.  
**Business Address**

**6** City, state, and ZIP code  
**Include City, State and Zip**

**7** List account number(s) here (optional)

**Requester's name and address (optional)**

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

**Sign Here**    Signature of U.S. person    **4**    Date    **4**

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9

2

Include Business Name, as filed with the IRS

3

EIN is entered, legible and matches the Business

4

W9 is signed and dated



For questions or assistance, email [businessrebates@oppd.com](mailto:businessrebates@oppd.com) or leave messages via the Application Dashboard.



## Cut Sheet

Only submit **cut sheets** for equipment that aligns or **matches the invoice and application.**

Equipment quantities listed on invoice and cut sheet must match the quantities on the application.



# OPPD Business Rebates LIGHTING CUT SHEET SUBMISSION CHECKLIST

Only submit **cut sheets** for equipment that aligns or **matches the invoice and application.**

### 1 INVOICE

- Equipment should match equipment on cut sheet and application

ORDER QTY	DESCRIPTION	UNIT PRICE	TOTAL PRICE
11	ABC-321-ZYZ-546 12K LUMEN DIE CAST HIGHBAY	39.95	799.00

### 2 CUT SHEET

- Ensure lamp, tube or fixture information is listed
- Highlight, circle or notate equipment that is part of the application
- Highlight or circle the DLC or Energy Star Logo



Origin Series  
Selectable Die Cast High Bay



ORDERING INFORMATION																																
ORHB	S	22-30L	COLOR TEMP.	CONTROLS	VOLTAGE	FIXTURE COLOR																										
ORHB = Die Cast High Bay	S = Selectable	12-21L = 12,000 - 21,000 Lumens Selectable 22-30L = 22,000 - 30,000 Lumens Selectable	Blank = Selectable 4000K, 5000K	Blank = Dimming (0-10V)	Blank = 120-277	Blank = White																										
				<table border="1"> <thead> <tr> <th>W</th> <th>H</th> <th>DEPTH</th> <th>POWER</th> <th>QTY</th> <th>WGT</th> <th>FINISH</th> <th>QTY</th> </tr> </thead> <tbody> <tr> <td>S</td> <td>3500</td> <td>82</td> <td>4000</td> <td>50000</td> <td>200</td> <td>46</td> <td>Glass</td> <td>25</td> </tr> <tr> <td>S</td> <td>3500</td> <td>82</td> <td>5000</td> <td>50000</td> <td>200</td> <td>46</td> <td>Glass</td> <td>25</td> </tr> </tbody> </table>	W	H	DEPTH	POWER	QTY	WGT	FINISH	QTY	S	3500	82	4000	50000	200	46	Glass	25	S	3500	82	5000	50000	200	46	Glass	25		
W	H	DEPTH	POWER	QTY	WGT	FINISH	QTY																									
S	3500	82	4000	50000	200	46	Glass	25																								
S	3500	82	5000	50000	200	46	Glass	25																								



### 3 APPLICATION

- Equipment quantities listed on invoice and cut sheet must match the quantities on the application.

OPPD Application			
Category	Name	Date	Qty
General Lighting	New LED Fixture	Jul 8, 2024, 2:07 PM	4
General Lighting	LED Exit Sign	Jul 8, 2024, 2:07 PM	20
Controls	Occupancy Sensor	Jul 8, 2024, 2:07 PM	35
General Lighting	New LED Fixture	Jul 8, 2024, 2:05 PM	11
General Lighting	New LED Fixture	Jul 8, 2024, 2:05 PM	4

Upload all documents as one PDF. If you are unable to upload:

- Email additional documents to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with Project Number in subject line of email.
- Submit a message in the Application Dashboard stating that additional documents have been emailed.

# ARC Cut Sheet

Only submit **cut sheets** for equipment that aligns or **matches the invoice and application.**

Equipment should match equipment on cut sheet and application

Include Tonnage

Manufacturer

Model

Energy Efficiency Ratio (EER)



## OPPD Business Rebates ARC CUT SHEET SUBMISSION CHECKLIST

Only submit **cut sheets** for equipment that aligns or **matches the invoice and application.**

### 1 INVOICE

- Equipment should match equipment on cut sheet and application

**Model: IEZA43D**

Product Dimensional Drawing

**PAUL MUELLER COMPANY**  
3630 W. Phelps Street • Springfield, MO 65802 U.S.A.  
417-875-9000 • 1-800-MUELLER • paulmueller.com

*\*Includes (Model OC43D)  
Outdoor Condenser*

**Dimensional & Electrical Table (Dual Circuit)**

Chiller Model#	Length Inches	Width Inches	Height Inches	Power			Compressor Qty	HP	RLA	LRA	Fan Motor		MCA	M.O.P.	Chiller Full Code	Weight LBS	Condenser Solution
				Voltage	Phase	Freq.					Sp.	FLA					
IEZA43DFB				208/230V	3	60Hz			89.7	300	7	230	300				
<b>ICZA43DHE</b>	<b>55</b>	<b>34</b>	<b>42</b>	<b>480V</b>	<b>3</b>	<b>60Hz</b>	<b>8</b>	<b>25</b>	<b>43.6</b>	<b>250</b>	<b>8</b>	<b>3.3</b>	<b>120</b>	<b>150</b>	<b>2</b>	<b>1700</b>	<b>OC43D</b>
IEZA43DB				480V	3	60Hz			32.7	198	2.8	95	110				

**Capacity Table (Refrigerant R407C)**

Model	Compressor	LRT	50°F			55°F			60°F			65°F			70°F		
			T	TONS	KW	EER	TONS	KW	EER	TONS	KW	EER	TONS	KW	EER	TONS	KW
43D	ZK309NCE	42.0	42.8	37.7	11.5	41.1	41.4	10.2	40.2	43.4	9.6	39.3	45.4	9.0	38.4	47.7	8.4
		44.0	44.2	38.1	11.8	42.5	41.8	10.5	41.6	43.7	9.8	40.8	45.8	9.3	39.8	48.1	8.7
		<b>46.0</b>	<b>45.0</b>	<b>38.3</b>	<b>11.9</b>	<b>43.3</b>	<b>42.0</b>	<b>10.8</b>	42.3	44.3	10.0	<b>41.4</b>	<b>46.3</b>	<b>9.4</b>	40.4	48.3	8.8
		48.0	48.8	38.4	12.6	46.8	43.0	11.2	45.8	46.3	10.8	44.9	48.8	10.3	43.8	49.2	9.4

1. Capacities on this chart are based on refrigerant R407C. Lower bearing water or low ambient can require the use of a glycol solution or other fluid blends. These solutions affect unit capacities. Please consult the factory on these or other special fluids.  
 2. kW input is for compressor(s) only.  
 3. EER = Energy Efficiency Ratio (BTU/wh-hr). Power inputs include compressor (s), condenser fan motor (s) and control power.

### 2 CUT SHEET

- Include Tonnage
- Manufacturer
- Model
- Energy Efficiency Ratio (EER)

Upload all documents as one PDF. If you are unable to upload:  
 1. Email additional documents to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) with Project Number in subject line of email.  
 2. Submit a message in the Application Dashboard stating that additional documents have been emailed.



# Custom Project Notification Form

Includes the following:

- **Scope of Project:** High-level explanation of the project that mentions the systems to be included in the rebate
- **Proposed M & V:** Describe how plan to establish the baseline for the project and measure the savings against the baseline
- **Agreed upon Certifications:** List of qualifications needed on the baseline and on the case study. This document is part of the Pre-Approval Process required documentation.



**CUSTOM REBATE PROJECT NOTIFICATION FORM**  
 Complete this form and email to [businessrebates@oppd.com](mailto:businessrebates@oppd.com) before submitting a Custom Rebate application.

**PROJECT INFORMATION & ADDRESS:**

**Scope of project:** This is a high-level explanation of the project that mentions the systems to be included in the rebate.

[Empty text box for Scope of project]

**Proposed M&V:** Please describe how you plan to establish the baseline for the project and how you will measure the savings against the baseline.

[Empty text box for Proposed M&V]

**Agreed upon Certifications:** This will list the qualifications needed on the baseline and on the case study.

[Empty text box for Agreed upon Certifications]

**THIS SECTION FOR OPPD USE ONLY**

**M&V Plan Comments:** The final M&V plan will be agreed upon after OPPD has reviewed the final project scope of work.

**TO BE ACKNOWLEDGED BY THE PARTIES BELOW.**

CHECK BOX TO ACKNOWLEDGE REVIEW

**TRADE ALLY:** \_\_\_\_\_  
 NAME COMPANY

**CUSTOMER:** \_\_\_\_\_  
 NAME COMPANY

**OPPD**

DATE RECEIVED BY OPPD: \_\_\_\_\_

VERSION NUMBER: 03132020

**Disclaimers:**

- If the final scope and/or measurement and verification deviate from what is outlined in this form a new form must be submitted and acknowledged as the original will be null and void.
- The Custom Rebate paid will be based on the final, OPPD-approved M&V report
- The OPPD Custom Rebate Program requires sustainable demand reduction achieved solely through improved energy efficiency, not demand response measures.

## Energy Study

Includes the following:

- **Copy of the Energy Study** with the Firm Name of Firm and Name of Person Responsible for Study with Signature & Date
- **Energy Study Invoice**

**SAMPLE Energy Study**

**Customer Name**  
 Name of City, Nebraska

Date

*Presented By*

Name of Firm

Name of Person Responsible for Study

\_\_\_\_\_  
 Signature (P.E.)

\_\_\_\_\_  
 Date

## Customer Commitment to Move Forward

Commitment can be the upload of a letter, email, signed agreement, etc. any documentation showing the customer is going to move forward with the project. Included the following on the form:

- Customer Information on letterhead
- Date
- Written statement as acceptance of Custom Energy Project proposal
- Project Number

**XYZ Company**

123 N 120 St, Anytown, NE 68822

(531) 226-3526

---

December 1, 2024

Please let this letter serve as acceptance of the Custom Energy Project proposal submitted by ABC Company. The PO for this project will be: 123456

## Confirmation of Trained Staff

Confirmation can be the upload of a letter, email, training “sign in sheet” any documentation showing the staff has been trained on the equipment and/or how to maintain energy efficiency gained by the project.

**XYZ Company**

123 N 120 St, Anytown, NE 68822

(531) 226-3526

---

January 14, 2025

Please let this letter serve as confirmation the following staff members have been trained on how to operate and maintain the energy savings from the recently installed and commissioned building management system.

Judy Emswiler

Matt Taylor

Paul Fortney

Training was provided by the vendor and took place the week of January 2<sup>nd</sup>.

## Case Study Report/Custom Rebate Energy Savings

All reports must include the following six sections: If you have questions please direct them to [businessrebates@oppd.com](mailto:businessrebates@oppd.com)

## Example: Custom Rebate Energy Savings/Case Study Report

All reports must include the following six sections: If you have questions please direct them to [businessrebates@oppd.com](mailto:businessrebates@oppd.com)

### Facility Information:

- Facility Name and address
- Square footage
- Year Built
- Number of stories
- Description of system included in the project
- Other items as deemed appropriate

### Custom Measures Completed:

- List each measure individually and date of completion – can be very brief

### M&V Method Used

- List approved M&V method and any additional qualifying information in regard to M&V

### Energy Performance & Savings Table:

The table below summarizes the Energy and Demand Savings originally estimated by the Energy Study conducted in --date---- and compares those estimates to actual realized savings during the first summer (or other agreed upon time period) of operation following implementation of the custom project described above and using the preapproved M&V protocol.

*See Footnote	Study Estimated Savings	Actual Savings (post completion)	% of Estimate Realized
Electric Consumption (kWh)			
Electric Demand (kW)			
Natural Gas Consumption (therms)			
Total Energy Saved (MMBTU)			
Utility Savings (\$\$)			

*\*Please provide as an addendum, for the approved M&V methodology, supporting documentation; summary of data; calculations; other information as appropriate to support the actual savings numbers you have entered in the table above.*

## Customer acceptance that project has been completed

### XYZ Company

123 N 120 St, Anytown, NE 68822  
(531) 226-3526

January 14, 2025

Project has been completed.



# ENERGY STAR® of Portfolio Manager Benchmarking Score & Sharing

## Set up your Account

Go to: [ENERGYSTAR.GOV](https://energystar.gov) and set up your account

[https://portfoliomanager.energystar.gov/pm/signup?\\_gl=1\\*if7li5\\*\\_ga\\*MTg5MjY0NjE5Mi4xNjg3OTg1MzAw\\*\\_ga\\_S0KJTVVLQ6\\*MTczMDE0ODIyMy4xNjguMS4xNzMTQ4MjI3LjAuMC4w](https://portfoliomanager.energystar.gov/pm/signup?_gl=1*if7li5*_ga*MTg5MjY0NjE5Mi4xNjg3OTg1MzAw*_ga_S0KJTVVLQ6*MTczMDE0ODIyMy4xNjguMS4xNzMTQ4MjI3LjAuMC4w)

**ENERGY STAR® Portfolio Manager®**

Help | Login  
Language: English | Français | Español

### Create an Account

Already have an account? [Sign In Here](#)

#### Accessing Your Account

Username:

Password:

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as \*, #, %, etc.).

Confirm Password:

#### About Yourself

First Name:

Last Name:

Job Title:

Email:

Confirm Email:

Note: We never share your email address with third parties.

Phone:

Country:

Language:

Reporting Units:  
 Conventional EPA Units (e.g., kBtu/ft²)  
 Metric Units (e.g., GJ/m²)

Street Address:

City/Municipality:

State/Province:

Postal Code:

#### About Your Organization

Organization Name:

Primary Business or Service of Your Organization:

Is your organization an ENERGY STAR Partner?  
 Yes  
 No

What type of Partner?

#### Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?

Do you want your username to be searchable by other Portfolio Manager users? You must select "Yes" if you want to connect with other users to allow automatic upload of utility data or to share properties.  
 Yes  
 No

#### Primary Business or Service

If you have more than one "primary business," just pick the best option. Portfolio Manager will determine your category for a score based on the information, like square footage, that you enter for each of your property uses.

#### Selecting a Username

You cannot change your username, so choose wisely. For organizations with multiple properties, we recommend you create a "corporate" account which "owns" all of the properties and have an administrator share properties with employees' individual accounts as necessary.

#### First & Last Name for Organizations

If you are creating a corporate account, you can enter your organization's name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division

**Create account** [Forgot password?](#)

**Log In**

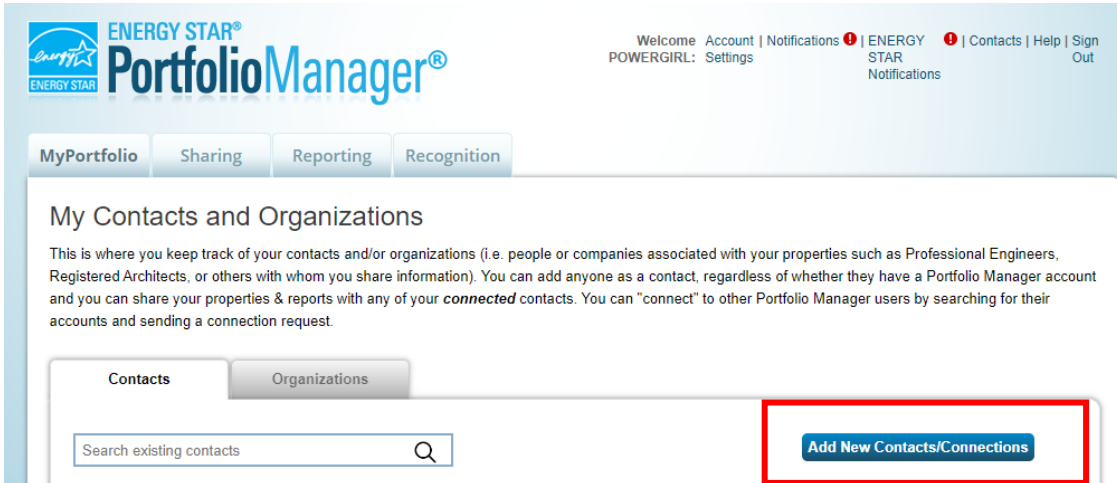
Or

**Sign in with LOGIN.GOV**

## Log in to your account and go to Contacts:



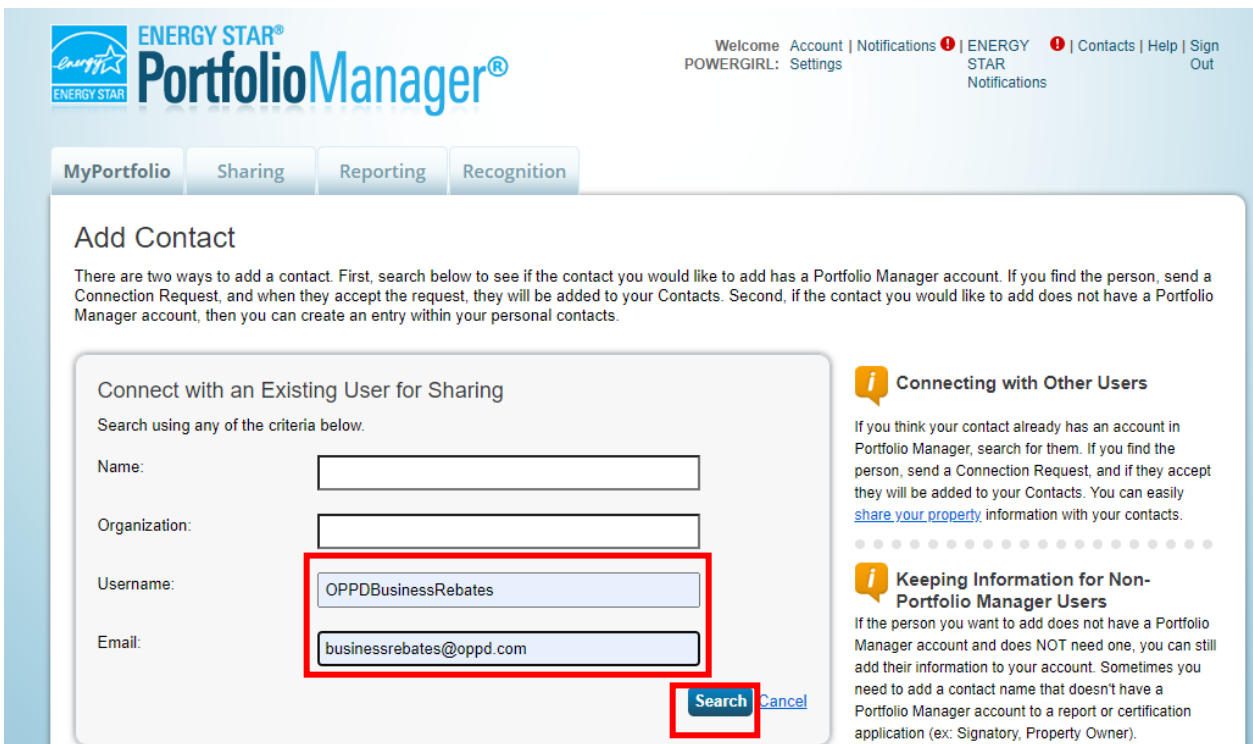
## Add New:



## Search for:

**Username: OPPDBusinessRebates**


**Email Address: businessrebates@oppd.com then: SEARCH**



## Once OPPD is found select CONNECT

### Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

<b>Your Search Criteria</b> Name: <input type="text"/> Organization: <input type="text"/> Username: <input type="text" value="OPPDBusinessRebates"/> Email Address: <input type="text" value="businessrebates@oppd.com"/> <input type="button" value="Search"/>	 Omaha Public Power District Business Rebates Team (OPPDBusinessRebates) Rebate Program Administration with Omaha Public Power District <input type="button" value="Connect"/> Page 1 of 1 1 - 1 of 1
--	--

#### Tip

Can't find what you are looking for? Try adjusting your search criteria.

## OPPD will check our account and accept your invite.


terria



**A connection request has been sent to Omaha Public Power District Business Rebates Team**

When Omaha Public Power District accepts your request, you will be able to share property information

OPPDBusinessRebates

## In the meantime you'll see CONNECTION PENDING on the screen



Welcome Account | Notifications  | ENERGY STAR  | Contacts | Help | Sign Out  
POWERGIRL: Settings Notifications

MyPortfolio | Sharing | Reporting | Recognition

### Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

#### Your Search Criteria


Name:

Organization:


Username:





Email Address:

[Search](#)

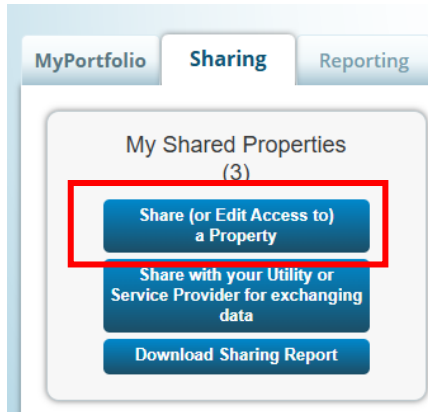
 Omaha Public Power District Business Rebates Team (OPPDBusinessRebates) Rebate Program Administration with Omaha Public Power District	Connection Pending <a href="#">Cancel</a>
---	--

Page 1 of 1 | 50 | 1 - 1 of 1

 **Tip**  
Can't find what you are looking for? Try adjusting your search criteria.

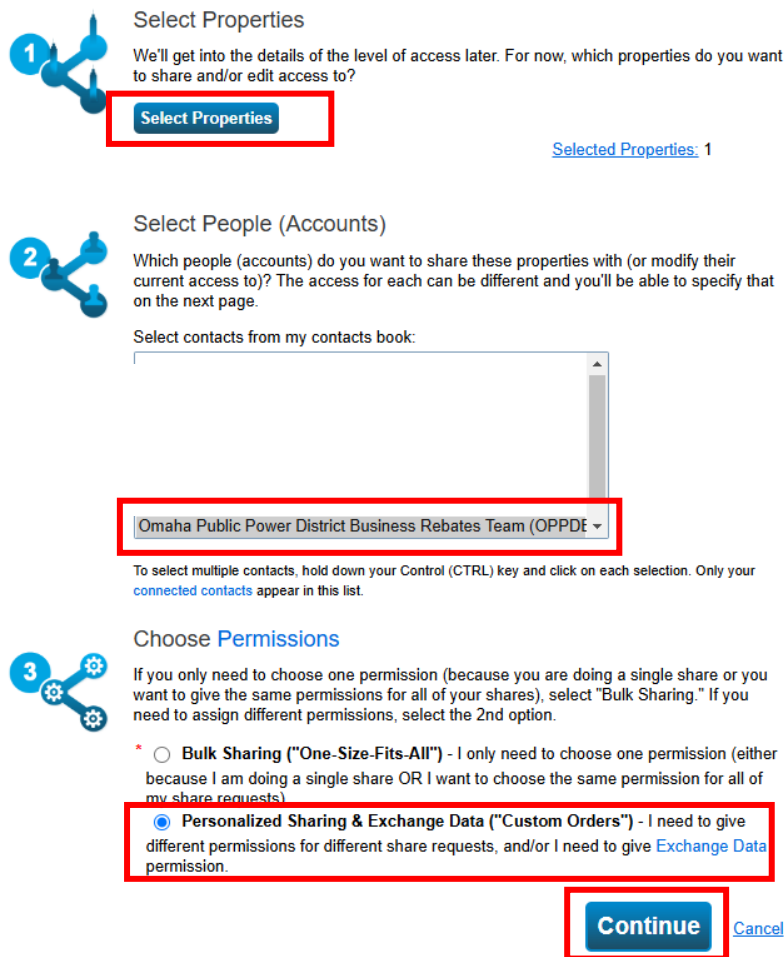
Follow Us     [Contact Us](#) | [Privacy Policy](#) | [Accessibility Statement](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)

Once OPPD accepts your connection you'll need to go into your account and click on the SHARING TAB. A list of your properties will show. Click on the one(s) you want to share.



This screen will appear:

1. SELECT PROPERTIES: click and it will take you to your list of properties select the one(s) you want to share
2. SELECT PEOPLE: OPPD from your contacts book
3. CHOOSE PERMISSIONS: Personalize Sharing CONTINUE



- SELECT:**
1. Read Only (usually this is what you will choose)
  2. Full Access or Custom Access (if OPPD will be maintaining the building's account)

**SHARE PROPERTIES**

### Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

**Who gets to Share Forward?**

- Full Access** - Automatically includes "Share Forward" rights
- Read Only** - Automatically does NOT include "Share Forward" rights
- Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
- Exchange Data** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

#### Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

Sort by: Property Name

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
8712 (1463210)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Omaha Public Power District Business Rebates Team	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Share Property(ies)** Cancel