



# 2018 Customer Participation Manual

01/01/2018

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# 1 Introduction

## 1.1 Overview

JEA is pleased to offer the 2018 InvestSmart with JEA portfolio of energy efficiency programs for commercial and industrial customers. This 2018 Customer Participation Manual, designed for use by customers and Trade Allies, details participation requirements and procedures for the following measures:

- HVAC (includes most HVAC equipment)
- Cool Roof and Window Film
- Refrigeration Solutions
- Water Heating
- Lighting
- Custom

These programs promote the implementation of high-efficiency energy conservation measures, which may involve installation of high efficiency equipment, servicing of equipment for optimized performance, or other activities aimed at reducing energy consumption. Rebates promoted through these programs serve to reduce JEA customers' incremental cost of selecting high-efficiency equipment over standard efficiency equipment. Rebates for qualifying measures are available for new construction/major renovation and retrofit applications, unless otherwise noted in the relevant Equipment Catalog.

To be eligible to participate, a customer must be served by one of JEA's three commercial and industrial electric rate schedules: General Service (GS), General Service Demand (GSD), or General Service Large Demand (GSLD).

Customers (as defined by a single FEID number) will be subject to a maximum rebate cap of \$100,000 per program year for participation in the Business Energy Upgrades and/or Custom Business Energy Upgrades programs.

The 2018 InvestSmart programs are available from January 1, 2018 to December 31, 2018. Applications will be processed on a first-come, first-served basis while funding is available. Once all available funds are committed, subsequent applicants may elect to be placed on a waiting list until more funding is made available. All applications must be received complete, with all required supporting documentation, by December 31, 2018 to be eligible for rebates during the 2018 program year. Completed applications MUST be submitted within 90 days of project completion to be eligible for a rebate. While JEA anticipates the InvestSmart programs to be an integral part of its future resource plan, it reserves the right to cancel or modify the programs at any time.

## 1.2 Contact Information

For questions about the InvestSmart programs, please visit [jea.com/investsmart](http://jea.com/investsmart), call the Customer Service Center at 888-345-4609 between 9am – 7pm, or email [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com).

## 1.3 Customer Complaints

JEA wishes to maintain the highest level of customer satisfaction and has therefore developed a customer complaint resolution process to address the needs of participating customers at any point in the rebate application process.

Customers who wish to dispute any decision or action performed by JEA during the course of processing rebate applications should contact the InvestSmart Customer Service Center at 888-345-4609 or [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com). Phone calls will be accepted immediately during the operating hours of the Customer Service Center; acknowledgement of receipt of customer emails or after hours voicemails will be delivered within two business days of initial receipt of customer email or voicemail, respectively.

## 2 Preparation

In order to apply for rebates under the Business Energy Upgrades or Custom Business Energy Upgrades programs, customers must first identify applicable energy conservation opportunities in their facilities. To help facilitate this initial step, JEA is currently supporting the following approach.

The approach involves the development of a Trade Alliance consisting of manufacturers, manufacturer's representatives, distributors, engineering firms, contractors, and other industry stakeholders involved anywhere in the life cycle of an energy conservation project (identifying opportunities, selling qualifying equipment, installing qualifying equipment, etc.). Participating Trade Allies have been screened by JEA and identified as reputable and capable of meeting the needs of customers wishing to implement qualifying energy conservation measures.

Trade Allies have access to training seminars and materials that enable them to walk customers through the entire program participation process from start to finish. While use of a participating Trade Ally is not required for participation in the Business Energy Upgrades or Custom Business Energy Upgrades programs customers are strongly encouraged to select participating Trade Allies when shopping for qualifying products and services, as their knowledge of the program and their access to program materials will prove invaluable to customers wishing to participate in these programs.

While JEA cannot explicitly or legally guarantee the work of any of its Trade Allies, the Trade Alliance is actively managed by JEA via quality control processes and customer complaint management. Trade Allies may be removed from the Alliance by JEA under certain circumstances at the discretion of JEA. Factors influencing such removal may involve customer complaints and the results of random inspections of rebated equipment performed by and at the discretion of JEA. For more information on identifying and selecting Trade Allies to implement your qualifying energy conservation measures, please visit [jea.com/investsmart](http://jea.com/investsmart).

### 3 Business Energy Upgrades

The Business Energy Upgrades program includes two distinct channels: Standard and Lighting. The Standard path may be used when customers are applying for rebates for typical standard measures that are explicitly listed in the Standard Equipment Catalogs (see appendices H,I,J,K). The Lighting path may be used when customers are applying for rebates for typical lighting measures that are explicitly listed in the Lighting Equipment Catalog (see appendix G).

#### 3.1 Standard Path

The following list of steps is visually represented in the diagram of **Figure 3-1 (below)**.

- Identify Energy Efficiency Project Opportunities  
As explained in Section 2 “Preparation”, JEA has provided the Trade Alliance as a valuable resource to help customers identify potential energy conservation measures at their facilities that may be eligible for rebates.
- Optional: Submit Rebate Reservation Request  
The Standard path is a post-purchase process in which customers apply for rebates *following* the purchase and installation of rebated equipment or the purchase and completion of upgrade services (e.g. the HVAC tune-up measure). Because of limited funding and the nature of a post-purchase application process, JEA and its customers could find themselves in the unfortunate position of customers having paid for the implementation of their measures and having submitted their application, only to have funds reach depletion while their application remains in the processing queue. The unfunded applications at the time of fund depletion would immediately be placed on a waiting list pending replenishing of rebate funds.

Because JEA is very aware of this possibility and wishes to avoid such a situation entirely, this optional pre-purchase Rebate Reservation Request step is being implemented to allow customers the option of reserving funds for a limited time *prior* to the purchase of qualifying equipment and services (see the Rebate Reservation Request Form in Appendix B). While this step will remain optional as long as the possibility of early fund depletion is remote, JEA will be monitoring the rate of rebate disbursements closely and reserves the right to *require* the Rebate Reservation Request if low levels of rebate funds are reached early in a program year. This would ensure customers know whether they will be able to receive their expected rebate(s) *before* they purchase qualifying equipment or services.

Until JEA provides notice of such a change to customers and Trade Allies through various communication channels upon reaching low levels of rebate funds prematurely, customers should consider the Rebate Reservation Request optional and should not be concerned about availability of rebate funds. Customers who do decide to submit the Rebate Reservation Request Form should follow the instructions in the form regarding required information and

submission processes. Customers submitting the Request Form may expect an approval notice from JEA within seven days of Request Form submittal.

- Purchase and Install / Perform Upgrades

Once potential Upgrades have been identified, customers may proceed with purchase and implementation. Although required documentation varies by measure, most measures will require submission of invoices and/or receipts at a minimum. Consult the Equipment Catalogs for specific requirements for each measure prior to implementation so that necessary documentation can be collected throughout the purchase and implementation process. Participating Trade Allies should be well versed in documentation requirements for measures which they support and will prove very helpful to customers on this step.

- Submit Standard Rebate Application

Once measures have been purchased and implemented, customers should compile all associated documentation and complete the Standard Rebate Application. This may be done in one of the following ways:

1. emailing PDF files to [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com), including the application (see Appendix C; completed fillable form or a scanned version filled out by hand) and copies of supporting documentation
2. mailing a hard copy application (see Appendix C) with all necessary documentation to: InvestSmart Business Energy Upgrades, 6620 Southpoint Drive South, Suite 630, Jacksonville, FL 32216

While both methods are acceptable, customers are encouraged to use them in the order shown above, recognizing that emailed applications will be placed in the queue immediately whereas hard copy applications will require additional travel and data entry time before landing in the processing queue. Thus emailed applications can expect faster processing times than hard copy applications sent through the mail.

JEA will review all applications for completeness and will validate application information with submitted invoices, receipts, and any other required documentation. Should questions or concerns arise, JEA will contact the customer directly and will work to obtain any missing or incomplete information prior to approval and placement into the rebate check processing queue. The time associated with such communications will be prior to and separate from the expected rebate check delivery time stated below.

JEA may, at its discretion, request access to the relevant equipment for the purposes of inspection related to quality control. By signing an application, the customer agrees to provide JEA reasonable access during normal business hours to the facilities where rebated equipment resides. Furthermore, the customer agrees to allow JEA reasonable access to inspect and unobtrusively monitor any and all equipment related to the application. The results of this post-installation inspection may affect application approval and rebate amounts if discrepancies are

discovered between observations and application details.

The customer also agrees to participate in brief telephone surveys or email surveys aimed at monitoring program quality and customer satisfaction.

- Receive Rebate Check

Customers should allow 4-6 weeks following submission of a complete application, including all required supporting documentation, to receive their rebate check. Rebates will be mailed to the address associated with the JEA account listed on the application unless otherwise noted in the Payment Release Information contained in the application.

Should customers not receive their rebate check or other application related communication from JEA in the timeframe stated above or should they have any concern at any time throughout the application process, they are encouraged to contact the InvestSmart Customer Service Center at 888-345-4609 or [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com).

- Allow Reasonable Access to Rebated Equipment for Follow-Up Inspection

Similar to the post-installation inspection that may be performed during the application review process, JEA may wish to conduct follow-up quality control after disbursement of rebates. Customers agree to allow JEA reasonable access during normal business hours for up to two years following receipt of rebates. These follow-up inspections are aimed at overall program performance, will be performed after disbursement of rebate checks, and will not affect said disbursements in any way.



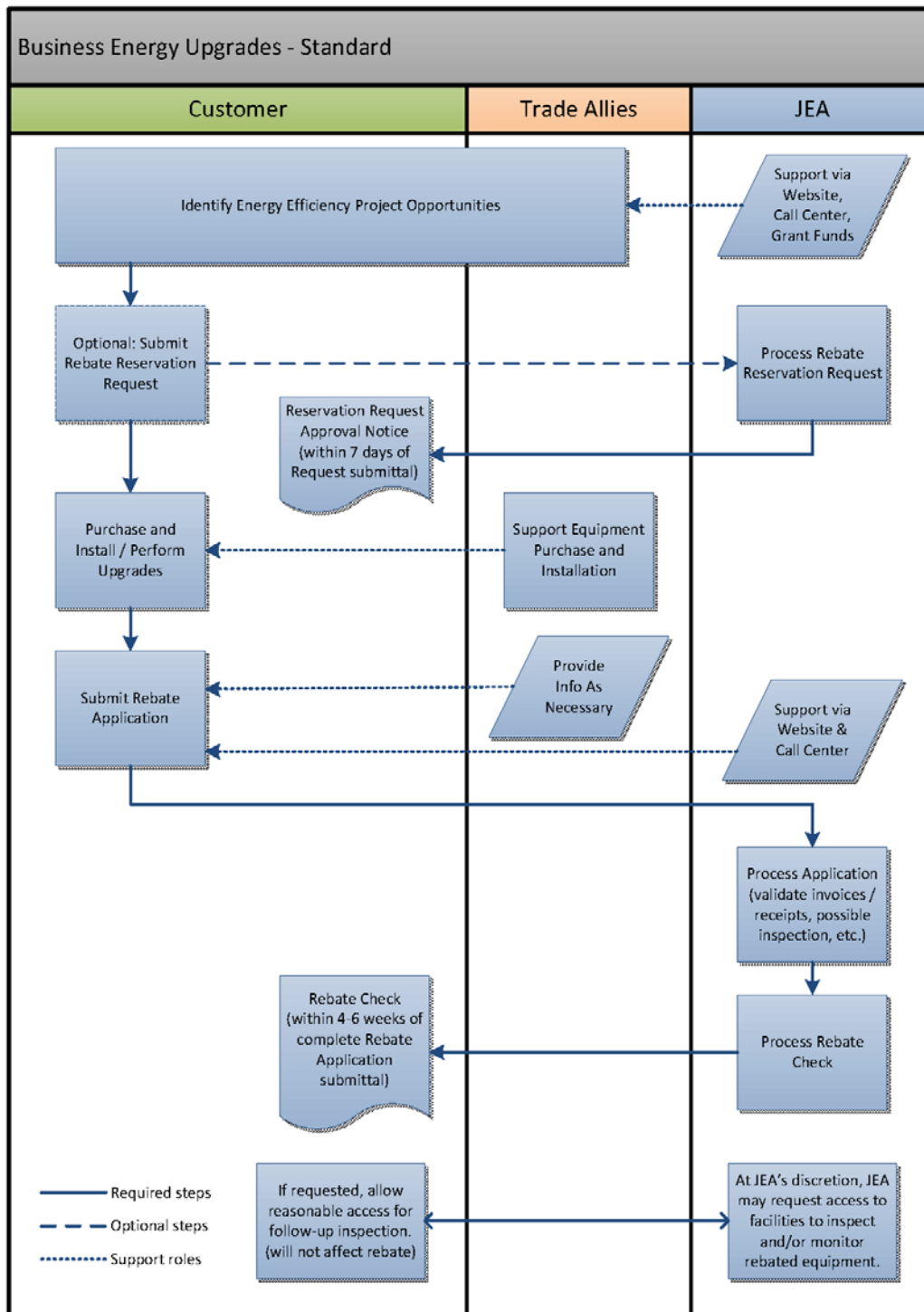


Figure 3-1: Standard Customer Participation Path

## 3.2 Lighting Path

The following list of steps is visually represented in the diagram of **Figure 3-2 (below)**.

- Identify Energy Efficiency Project Opportunities  
As explained in Section 2 “Preparation”, JEA has provided the Trade Alliance as a valuable resources to help customers identify potential energy conservation measures at their facilities that may be eligible for rebates.
- Submit “As Planned” Lighting Workbook  
*Prior* to the purchase of any qualifying lighting equipment, customers must submit the “As Planned” Lighting Workbook, a Microsoft Excel file which can be obtained by contacting InvestSmart with JEA at [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com), or 888-345-4609, or a participating Trade Ally. Detailed instructions for completing the Workbook are included in the Workbook. Customers should also read the Lighting Equipment Catalog (see Appendix G).

Required information for the Lighting Workbook includes facility details, operating schedules, and existing and proposed lighting equipment details. Equipment is selected from extensive lists resident within the Workbook. Customers will need to know the details of both the existing and the proposed lighting equipment in order to select the appropriate entries from the list. Given these inputs, the Workbook automatically calculates the reduction in installed wattage and the associated rebate amount.

The “As Planned” Lighting Workbook may be submitted the following way:

1. emailing [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com), including the “As Planned” Lighting Workbook and a scanned copy of the signed Terms and Conditions page from the Workbook

**Note that the Lighting Workbook must be submitted as a Microsoft Excel file; it cannot be submitted as a PDF.**

While all three methods are acceptable, customers are encouraged to use them in the order shown above, recognizing that emailed submissions will be placed in the queue immediately whereas mailed submissions will require additional travel and data entry time before landing in the processing queue.

JEA will review all submissions for completeness and will validate application information with supporting documentation. Should questions or concerns arise, JEA will contact the customer directly and will work to obtain any missing or incomplete information in a timely manner.

- Allow Reasonable Access to Existing Equipment for Pre-Installation Inspection



Because of the wide variety of lighting equipment and controls that may be present in existing facilities, all lighting projects require a pre-installation inspection. Once a customer submits the “As Planned” Lighting Workbook, JEA will contact the customer to schedule the pre-installation inspection. The customer agrees to provide JEA reasonable access to the relevant facilities and equipment during normal business hours.

JEA will not approve rebates for lighting projects in which equipment was installed *prior* to this mandatory pre-installation inspection. Customers who *purchase* equipment prior to the pre-installation inspection but delay *installation* until after the pre-installation inspection and the receipt of the Pre-Approval Notice ***do so at their own risk*** by not waiting for the results of JEA’s review of the “As Planned” Lighting Workbook and the results of the inspection. The results of this review/inspection process may lead to adjustments of rebate amounts if incorrect information was determined to have been present in the “As Planned” Lighting Workbook. The Pre-Approval Notice will explain any such adjustments and the reasons for them. Customers are therefore, strongly urged to delay both purchase and installation of qualifying lighting equipment until JEA has delivered the Pre-Approval Notice following review of the “As Planned” Lighting Workbook and the pre-installation inspection.

- Receive Pre-Approval Notice

Once JEA has reviewed the “As Planned” Lighting Workbook and performed the pre-installation inspection, a Pre-Approval Notice will be sent to the customer providing the details of the measures being approved. The Notice may approve the original submission as-is or may contain modifications or adjustments to equipment specifications and/or rebate amounts based on the initial review and the pre-installation inspection. (See Section 1.3 Customer Complaints in this manual for details on available recourse should a customer disagree with modifications made to an original “As Planned” Lighting Workbook submittal.)

The Pre-Approval Notice represents the reservation of rebate funds in the amounts stated in the Notice and contingent on the installation of equipment as stated in the original submission, including any modifications indicated in the Notice based on the review and the pre-installation inspection.

- Purchase and Install / Perform Upgrades

Upon receipt of the Pre-Approval Notice, customers may proceed with purchase and implementation of approved measures. Consult the Lighting Equipment Catalog for specific documentation requirements prior to implementation so that necessary documentation can be collected throughout the purchase and implementation process. Participating Trade Allies should be well versed in documentation requirements for measures which they support and will prove very helpful to customers on this step.

- Submit “As Installed” Lighting Workbook



Upon implementation of qualifying lighting measures, customers should submit an “As Installed” Lighting Workbook along with all relevant receipts/invoices and manufacturer specification sheets as indicated in the Lighting Equipment Catalog and the Lighting Workbook. The “As Installed” Lighting Workbook will be the same as the “As Planned” Lighting Workbook except for any changes to the project scope made since the submission of the “As Planned” Lighting Workbook. For example, if supplier stock limitations resulted in selection of a different replacement bulb type than originally planned, the actual bulb type that was purchased and installed should be included in the “As Installed” Lighting Workbook. The “As Installed” Lighting Workbook should be submitted in the same manner as the “As Planned” Lighting Workbook as described above.

JEA may, at its discretion, request access to the relevant equipment for the purposes of inspection related to quality control. By signing an application, the customer agrees to provide JEA reasonable access during normal business hours to the facilities where rebated equipment resides. Furthermore, the customer agrees to allow JEA reasonable access to inspect and unobtrusively monitor any and all equipment related to the application. The results of this post-installation inspection may affect application approval and rebate amounts if discrepancies are discovered between observations and application details.

The customer also agrees to participate in brief telephone surveys or email surveys aimed at monitoring program quality and customer satisfaction.

- Receive Rebate Check

Customers should allow 4-6 weeks following submission of the “As Installed” Lighting Workbook, including all required supporting documentation, to receive their rebate check. Rebates will be mailed to the address associated with the JEA account listed on the application unless otherwise noted in the Payment Release Information contained in the Terms and Conditions section of the Lighting Workbook.

Should customers not receive their rebate check or other application related communication from JEA in the timeframe stated above or should they have any concern at any time throughout the application process, they are encouraged to contact the InvestSmart Customer Service Center at 888-345-4609 or [jeaefficiencyrebates@nexant.com](mailto:jeaefficiencyrebates@nexant.com).

- Allow Reasonable Access to Rebated Equipment for Follow-Up Inspection

Similar to the post-installation inspection that may be performed during the application review process, JEA may wish to conduct follow-up quality control after disbursement of rebates. Customers agree to allow JEA reasonable access during normal business hours for up to two years following receipt of rebates. These follow-up inspections are aimed at overall program performance, will be performed after disbursement of rebate checks, and will not affect said disbursements in any way.

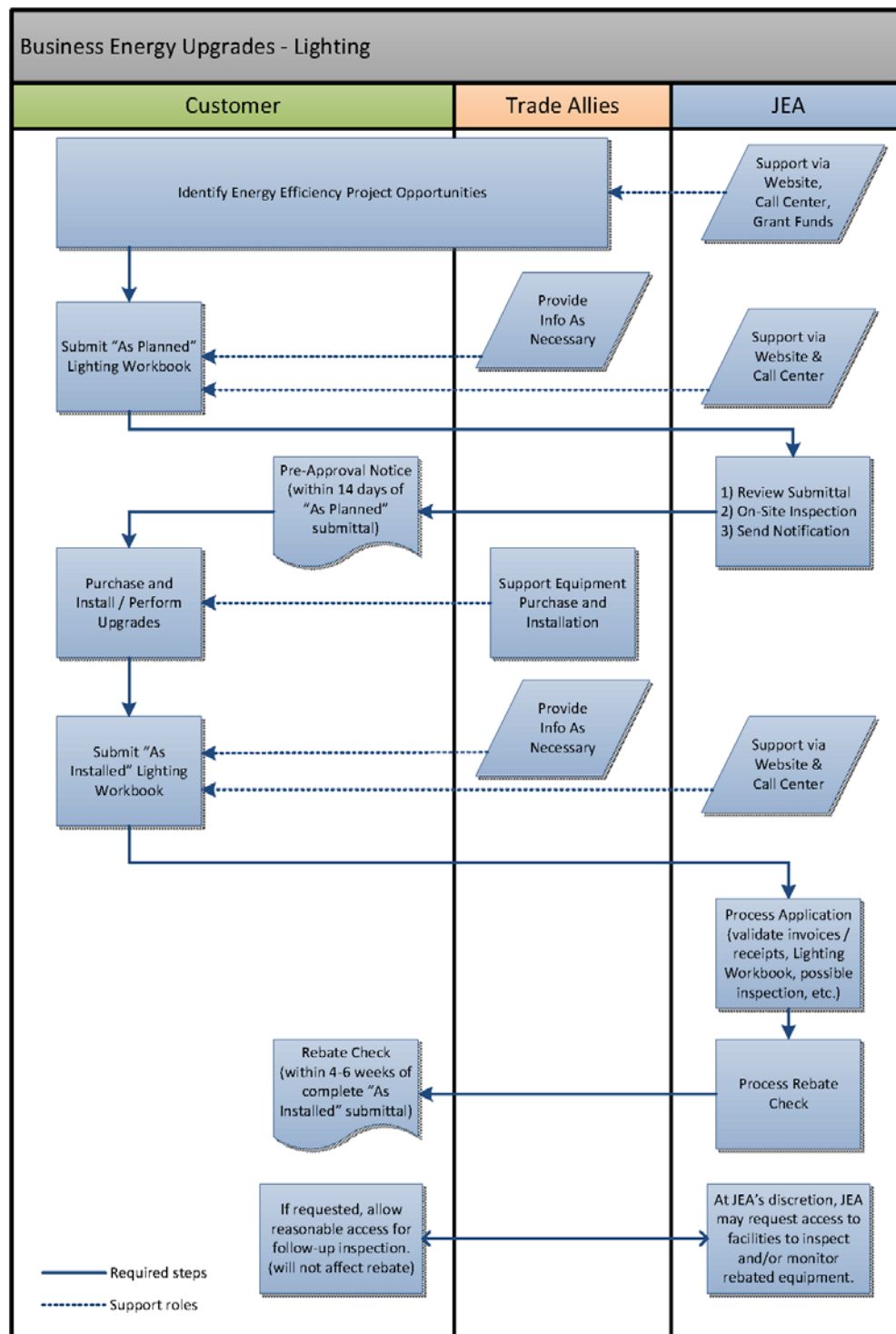


Figure 3-2: Lighting Customer Participation Path

## 4 Custom Business Energy Upgrades

Custom Business Energy Upgrades covers large or more complex projects that do not qualify under the Business Energy Upgrades program.

The following list of steps is visually represented in the diagram of **Figure 4-1 (below)**.

- Identify Energy Efficiency Project Opportunities  
As explained in Section 2 “Preparation”, JEA has provided the Trade Alliance as a valuable resource to help customers identify potential energy conservation measures at their facilities that may be eligible for rebates.
- Submit Pre-Approval Application  
Customers should read the Custom Equipment Catalog (see Appendix L) for requirements and exclusions related to measures that will be allowed to participate via the Custom path. *Prior* to the purchase and implementation of qualifying measures, customers should submit the Custom Application (see Appendix D) in one of the following ways:
  1. emailing PDF files to [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com), including the application (see Appendix D) completed fillable form or a scanned version filled out by hand and copies of supporting documentation
  2. mailing a hard copy application (see Appendix D) with all necessary documentation to: InvestSmart Business Energy Upgrades, 6620 Southpoint Drive South, Suite 630, Jacksonville, FL 32216

While all both

methods are acceptable, customers are encouraged to use them in the order shown above, recognizing that emailed submissions will be placed in the queue immediately whereas hard copy submissions will require additional travel and data entry time before landing in the processing queue. Thus emailed submissions can expect faster processing times than hard copy submissions sent through the mail.

JEA will review all submissions for completeness and will validate application information with supporting documentation. Should questions or concerns arise, JEA will contact the customer directly and will work to obtain any missing or incomplete information in a timely manner.

- Allow Reasonable Access to Existing Equipment for Pre-Installation M&V  
Because of their unique nature, all Custom projects require pre-installation measurement and verification (M&V). Once a customer submits the Custom Application, JEA will contact the customer to schedule the pre-installation M&V. The customer agrees to provide JEA reasonable access to the relevant facilities and equipment during normal business hours for the purposes of equipment inspection and unobtrusive installation of monitoring equipment to measure the performance of existing equipment slated for upgrade. Monitoring may be necessary for an

extended period of time depending on the technical nature of the measure under consideration. JEA reserves the right to decide how much and what types of monitoring are necessary to provide sufficient confidence in the Custom measure's ability to produce the claimed energy savings.

JEA will not approve rebates for Custom projects in which equipment was installed *prior* to mandatory pre-installation M&V activities. Customers who *purchase* equipment prior to pre-installation M&V but delay *installation* until after pre-installation M&V and after the receipt of the Pre-Approval Notice ***do so at their own risk*** by not waiting for the results of JEA's review of the original Custom Application and the results of the M&V activities. The results of this review/M&V process may lead to adjustments of rebate amounts if incorrect information was determined to have been present in the Custom Application. The Pre-Approval Notice will explain any such adjustments and the reasons for them. Customers are therefore, strongly urged to delay both purchase and installation of qualifying Custom equipment until JEA has delivered the Pre-Approval Notice following review of the Custom Application and the pre-installation M&V findings.

- Receive Pre-Approval Notice

Once JEA has reviewed the Custom Application and performed the pre-installation M&V, a Pre-Approval Notice will be sent to the customer providing the details of the measures being approved. The Notice may approve the original submission as-is or may contain modifications or adjustments to equipment specifications and/or rebate amounts based on the initial review and pre-installation M&V. (See Section 1.3 Customer Complaints in this manual for details on available recourse should a customer disagree with modifications made to an original Custom Application submittal.)

The Pre-Approval Notice represents the reservation of rebate funds in the amounts stated in the Notice and contingent on the installation of equipment as stated in the original submission, including any modifications indicated in the Notice based on the review and the pre-installation M&V.

- Purchase and Install / Perform Upgrades

Upon receipt of the Pre-Approval Notice, customers may proceed with purchase and implementation of approved measures. Consult the Custom Equipment Catalog (see Appendix L) for specific documentation requirements prior to implementation so that necessary documentation can be collected throughout the purchase and implementation process. Participating Trade Allies should be well versed in documentation requirements for measures which they support and will prove very helpful to customers on this step.

- Submit Post-Installation Application

Upon implementation of qualifying Custom measures, customers should submit a Custom Installation Notice (see Appendix E) along with all relevant receipts/invoices and manufacturer

specification sheets as indicated in the Custom Equipment Catalog. The Custom Installation Notice should be submitted in the same manner as the Custom Application per the instructions above and in the Custom Equipment Catalog.

The Custom Installation Notice should contain any details related to departures from the plans submitted in the Custom Application and should clearly state the reasons for such departures. It must also show updated rebate calculations. Detailed instructions may be found in the Custom Equipment Catalog.

- Allow Reasonable Access to Rebated Equipment for Post-Installation M&V

The same allowances must be given for post-installation M&V that are explained in the pre-installation M&V section above. If Custom Installation Notice documentation reviews or post-installation M&V reveals discrepancies between the actual measures installed and the measures as indicated in the Custom Application or the Custom Installation Notice, JEA will make the necessary modifications and adjustments to measure details and any corresponding rebate amounts and notify the customer of such changes. (See Section 2.9 Customer Complaints in this manual for details on available recourse should a customer disagree with modifications made to an original Custom Installation Notice submittal.)

- Receive Rebate Check

Customers should allow 4-6 weeks following submission of the Custom Installation Notice, including all required supporting documentation, to receive their rebate check. Rebates will be mailed to the address associated with the JEA account listed on the application unless otherwise noted in the Payment Release Information in the application.

Should customers not receive their rebate check or other application related communication from JEA in the timeframe stated above or should they have any concern at any time throughout the application process, they are encouraged to contact the InvestSmart Customer Service Center at 888-345-4609 or [jeaefficiencyrebates@nexant.com](mailto:jeaefficiencyrebates@nexant.com).

- Allow Reasonable Access to Rebated Equipment for Follow-Up M&V

Because of interest in the long term performance of energy conservation measures sponsored by Business Energy Upgrades, JEA reserves the right to request reasonable access to rebated equipment and the facilities in which they reside to perform inspections and M&V related to energy savings persistence for up to two years following customer receipt of rebate checks. These persistence inspections will follow rebate check disbursement and will not affect said disbursements in any way.



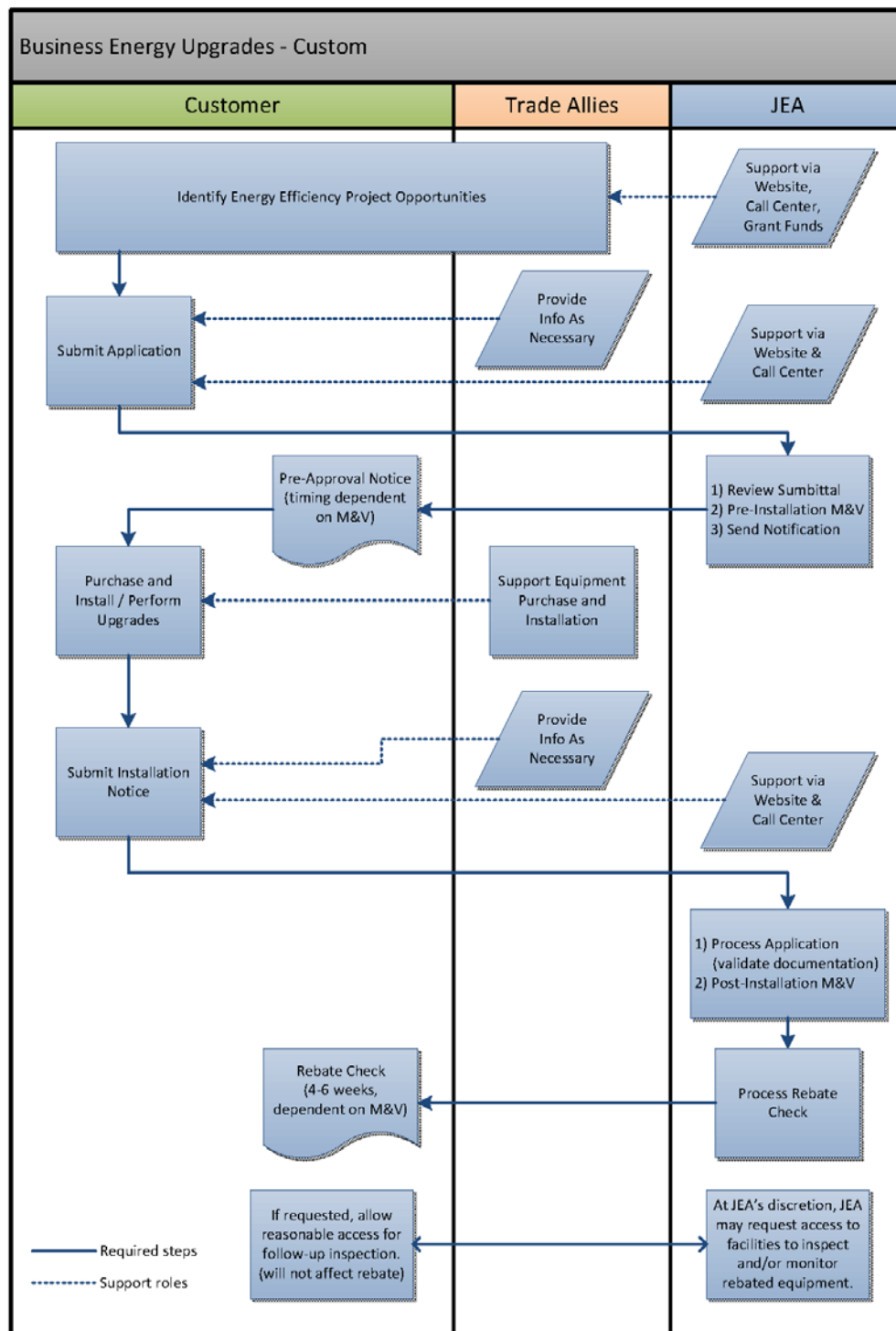


Figure 4-1: Custom Customer Participation Path

## Appendix A - Frequently Asked Questions

- Is my facility eligible for this program?

The facility is eligible for the program if it is served by JEA under one of the commercial or industrial electric rates (General Service, General Service Demand, or General Service Large Demand). New construction and retrofit projects are eligible for the majority of rebates; see Equipment Catalogs for details.

- When will I receive my rebate from JEA?

After an eligible measure is installed and the completed rebate application (for standard measures) or final documentation (for lighting measures) is received, you will receive your rebate within 4-6 weeks.

- What if I am installing a measure in a leased property and my tenant is responsible for the electric bill?

Eligibility is determined based on the information on the electric account for the building where the equipment is installed. Rebates will be paid to the name and address on the electric account unless otherwise indicated in the Rebate Payment Information section of the Rebate Application.

- How long will this program be available?

The 2018 Rebate Program is available from January 1, 2018 to December 31, 2018. Applications for this program year must be received no later than December 31, 2018. While JEA anticipates InvestSmart to be an integral part of its future resource plan well beyond 2018, it reserves the right to cancel or modify the program at any time.

- Where can I find out more about this program?

Customers can learn more about InvestSmart by visiting [jea.com/investsmart](http://jea.com/investsmart), calling 888-345-4609, or emailing [jeaefficiencyrebates@nexant.com](mailto:jeaefficiencyrebates@nexant.com).



## Appendix B - Rebate Reservation Request Form

**Customer Information**

Business Name (as it appears on JEA Bill)			
JEA Account Number(s) where measure(s) to be installed			
JEA Meter Number(s) where measure(s) to be installed			
Mailing Address	City	State	Zip
Installation Address (if different from the mailing address)	City	State	Zip
Contact Name	Contact Phone Number	Contact Fax Number	Email
Electric account billing address (if different from the installation address)	City	State	Zip

**Energy Efficient Measure Information**Installation Type ☐ Retrofit ☐ New Construction

Estimated measure installation date: \_\_\_\_\_

If rebate funds are not available, do you wish to be placed on a waiting list? ☐ Yes ☐ No**Standard Measures<sup>1</sup> (attach additional sheets as necessary)**

Parameter	Measure 1	Measure 2	Measure 3	Measure 4	Measure 5
Measure Type:					
Quantity:					
Estimated Rebate:					

<sup>1</sup>Eligible choices include: Heating; Cooling and Air Handling; Insulation and Windows; Refrigeration Solutions; Water Heating and Appliances.**Terms and Conditions**

InvestSmart provides eligible customers with rebates to facilitate the installation and service of qualifying energy efficient equipment. Rebates will be reserved on a first-come, first-served basis for approved requests. This Rebate Reservation Request allows customers:

1. to request rebate funds be reserved for up to 60 days during which the purchase, installation, and submittal of a completed Rebate Application for eligible standard measures will be completed.

Approved rebate reservation amounts will expire according to the schedule outlined above unless alternative timelines are approved in writing by JEA. Additional rebate funds for qualifying measures will be based on funding availability and rules. Allow seven (7) days for processing and notification of rebate reservation status. Approved funds reservations do not guarantee final acceptance of rebate application.

Program procedures, requirements, and rebate levels are subject to change or cancellation without notice.

## Appendix C - Standard Rebate Application



### Application Instructions

This application is required for participation in InvestSmart Business Energy Upgrades for customers installing qualifying measures other than lighting. The Lighting Workbook required for application of lighting rebates can be obtained by email at [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com) or by calling 888-345-4609. Complete participation information and eligibility specifications are included in the Customer Participation Manual, also available at [jea.com/investsmart](http://jea.com/investsmart).

This application packet contains the following forms:

- General Information
- Building Information
- Rebate Payment Information
- Rebate Worksheet
- Program Agreement

To participate in InvestSmart Business Energy Upgrades, please review the following steps:

1. Read the Customer Participation Manual for a complete description of program eligibility requirements and the participation process.
2. Read the Terms and Conditions found online at [jea.com/investsmart](http://jea.com/investsmart).
3. Complete the following forms included with this Rebate Application:
  - General Information – Include all required customer and account information.
  - Building Information – Include the type of structure to which the energy efficiency measures were applied.
  - Rebate Payment Information – Rebates will be mailed to customer's electric account billing address. If customer would prefer the check be designated to someone other than the customer, complete the Payment Release Information on page 2.
  - Rebate Worksheet – Include all required product information including: product type, install date, dealer name, manufacturer, model number(s), serial number, efficiency, size, quantity, and rebate amount. Dealers or contractors may assist with the completion of the rebate worksheet.

Signing this form accepts the terms and conditions of InvestSmart Business Energy Upgrades.

4. Complete any required supplemental forms for the energy efficiency measures being installed, if applicable.
5. Retain a copy of all completed application forms and all required documentation, such as invoices and contracts. Submitted applications will become the property of JEA.
6. Submit the completed application forms and required documentation including dated sales receipt or invoices by email to [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com).

For more information contact us at:

InvestSmart Business Energy Upgrades  
6620 Southpoint Drive South, Suite 630  
Jacksonville, FL 32216

Online: [jea.com/investsmart](http://jea.com/investsmart) | Phone: (888) 345-4609 | Email: [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com)

### General Information

Important: Energy efficiency measures must be purchased, installed, and/or completed at a qualifying customer facility prior to submitting the Rebate Application unless otherwise noted in the Equipment Catalog. Please allow 4-6 weeks for application and rebate processing following complete documentation submittal. Rebates will not be paid for ineligible or incomplete applications.

Business Name (as it appears on JEA Bill)

Federal Tax ID (EIN) (Must be 9 digits)

Business Classification (Check ONE. Required for all businesses, including non-profits):

☐ Individual/sole proprietor ☐ Corporation ☐ Partnership ☐ LLC ☐ Exempt ☐ Other (please describe): \_\_\_\_\_

JEA Account Number(s) where measure(s) to be installed (located on JEA bill)

Mailing Address City State Zip

Installation Address City State Zip

Contact Name Phone Number Fax Number Email

Electronic account billing address (if different from the installation address) City State Zip

## General Information, continued

How did you hear about InvestSmart Business Energy Upgrades?

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Account Executive | <input type="checkbox"/> Newspaper Ad   | <input type="checkbox"/> Vendor/Contractor |
| <input type="checkbox"/> Bill Insert       | <input type="checkbox"/> JEA Electronic | <input type="checkbox"/> Newsletter/Other  |
| <input type="checkbox"/> Magazine Ad       | <input type="checkbox"/> JEA Website    |  |

## Building Information

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Automotive Facility         | <input type="checkbox"/> Hotel                   | <input type="checkbox"/> Police/Fire Station       |
| <input type="checkbox"/> Convention Center           | <input type="checkbox"/> Library                 | <input type="checkbox"/> Post Office               |
| <input type="checkbox"/> Court House                 | <input type="checkbox"/> Manufacturing Facility  | <input type="checkbox"/> Religious Building        |
| <input type="checkbox"/> Dining: Bar Lounge/Leisure  | <input type="checkbox"/> Motel                   | <input type="checkbox"/> Retail                    |
| <input type="checkbox"/> Dining: Cafeteria/Fast Food | <input type="checkbox"/> Motion Picture          | <input type="checkbox"/> Theater School/University |
| <input type="checkbox"/> Dining: Family              | <input type="checkbox"/> Multi-Family Housing    | <input type="checkbox"/> Sports Arena              |
| <input type="checkbox"/> Dormitory                   | <input type="checkbox"/> Museum                  | <input type="checkbox"/> Town Hall                 |
| <input type="checkbox"/> Exercise Center             | <input type="checkbox"/> Office                  | <input type="checkbox"/> Transportation            |
| <input type="checkbox"/> Gymnasium Parking           | <input type="checkbox"/> Garage                  | <input type="checkbox"/> Warehouse                 |
| <input type="checkbox"/> Health Care - Clinic        | <input type="checkbox"/> Penitentiary            | <input type="checkbox"/> Workshop                  |
| <input type="checkbox"/> Hospital                    | <input type="checkbox"/> Performing Arts Theater | <input type="checkbox"/> Other _____               |

Building Size (sq. ft.) : \_\_\_\_\_

Number of Floors: \_\_\_\_\_

Year Built: \_\_\_\_\_

Percent Conditioned: \_\_\_\_\_

Annual Operating Hours: \_\_\_\_\_

Temperature Set-points:

Heating: \_\_\_\_\_ °F      Cooling: \_\_\_\_\_ °F

Occupied \_\_\_\_\_ °F      \_\_\_\_\_ °F

Un-Occupied \_\_\_\_\_ °F      \_\_\_\_\_ °F

## Rebate Payment Information

Mail rebate check to: ☐ JEA Billing Address ☐ Other (complete release below)

Rebate check reference (15 character maximum) \_\_\_\_\_

## Payment Release Information

Check should be payable to:

Payee: Business Name \_\_\_\_\_ Contact Phone Number \_\_\_\_\_

Payee Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Important: Complete this section only if rebate check is to be directed to someone other than the customer indicated on Page 1.

## Rebate Worksheet

Important: This form is to be completed and submitted to JEA as part of the Rebate Application. Please refer to the Equipment Catalog(s) for measure eligibility requirements, rebate amounts and equipment codes. Dealers or contractors may assist in the completion of this form. Attach additional sheets as necessary.

Parameter	Measure 1	Measure 2	Measure 3
Equipment Code			
Project Type (Retrofit or New Construction)			
Installation Date			
Equipment Location (e.g. Roof, Mechanical Room)			
Equipment End Use (e.g. Supply Fan, CHW Pump)			
Age of Replaced Equipment (for retrofits)			
Dealer Name			
Manufacturer			
Model Number			
Serial Number			
Annual Operating Hours <sup>2</sup>			
Efficiency (ies) (as described in Equipment Catalog)			
Measure Size (as described in Equipment Catalog)			
Measure Rebate (\$) (e.g. HVAC: \$50/ton x 10 tons = \$500)			
Number of Measures			
<b>Total Rebate (\$)</b> (# of Measures x Measure Rebate)	\$	\$	\$

Please list contractors/vendors used  
for the installation of this project:

---



---



---



---

## Application Checklist:

Before submitting this application please verify the following:

- Did you read and understand the eligibility requirements in the Equipment Catalog?
- Have you included a dated sales invoice?
- Did you attach any additional documentation listed in the Equipment Catalog?
- Did you include your account number?
- Did you sign the Terms and Conditions Form?

<sup>2</sup> If VFD installation is included, please specify the equipment schedule(s).



## Prescriptive Program Agreement

This Program Agreement sets forth the participation requirements for customers applying for rebates through the InvestSmart Business Energy Upgrades Prescriptive Program ("Program"). By signing below, the customer named in the Program Application ("Customer") is agreeing to comply with and be bound by these terms.

**Program Administrator:** The Program is sponsored by JEA and administered by Nexant, Inc. ("Program Administrator"). Customer stipulates and agrees that Nexant acting on behalf of JEA to otherwise administer the Program is the intended third party beneficiary of this Agreement, who will be protected by and benefit from this Agreement in the same manner as JEA with the right to enforce those provisions and this Agreement against Customer directly, in the same fashion as a party hereto.

**Eligibility:** To qualify for rebates, Customer must be a commercial or industrial JEA electric customer and purchase and install qualifying measures. In the case of a leased facility, Customer certifies that Customer has obtained appropriate permission from the building owner. Customer represents and warrants that it is eligible and authorized to participate in the Program, and that Customer's participation in the Program will not result in the violation or breach by Customer of law, Customer's contractual obligations, or other duties to or rights of any third party.

The InvestSmart Business Energy Upgrades Equipment Catalogs ("Equipment Catalog"), available online at [jea.com/Ways\\_to\\_Save/Commercial\\_Rebates](http://jea.com/Ways_to_Save/Commercial_Rebates), describe the eligibility requirements for the various measures and equipment eligible for rebates through the Program and are incorporated in and constitute a part of this Agreement. Only qualified equipment that meets the requirements specified in the respective Equipment Catalog will be eligible for Program consideration. Qualifying equipment receiving rebates under the Program are not eligible for purchase and installation rebates or credits under any other JEA programs.

### Program Participation Steps:

1. Customers interested in participating in the Program may or may not utilize a Program approved JEA contractor ("Trade Ally") to perform the installation of eligible measures. A list of Program approved Trade Ally contractors is available at [JEA.com/investsmart](http://JEA.com/investsmart). Pre-qualification of Program eligible measures is not required for prescriptive measures except for retrofit lighting equipment and occupancy sensors, as specified in more detail below.
2. To be considered for rebates offered by the Program, Customer must submit a fully completed Rebate Application, applicable attachments, and required measure documentation ("Rebate Application"), incorporated herein by reference after installing the Program eligible measures. Measure specific documentation required to be submitted with the Rebate Application and specific instructions for completing the Rebate Application related to the measure are outlined in the respective Equipment Catalog. As part of the Rebate Application review process, JEA or Program Administrator may request additional documentation and conduct any and all site inspection activities necessary to confirm the installation and operability of measures. Failure to provide or complete any of the requested information or Program requirements may result in the return of the Rebate Application.
3. **For retrofit lighting equipment and occupancy sensors:** Retrofit lighting and new and retrofit occupancy sensor project applicants must submit a Lighting Workbook **prior to equipment purchase and installation**. The Lighting Workbook will serve as a customer's application. A Lighting Workbook can be obtained by contacting InvestSmart with JEA at [jeaefficiencyrebates@nexant.com](mailto:jeaefficiencyrebates@nexant.com), or 904-551-3739, or a participating Trade Ally. Upon receipt of all required documentation from Customer and completion of any pre-inspections at the Facility, JEA will review Customer's Lighting Workbook and issue Customer a preapproval notice (email is sufficient) including the preapproved rebate amount. As part of the review process, JEA may conduct any site inspection activity necessary to confirm the baseline conditions and anticipated project scope. After JEA provides written preapproval of the Lighting Workbook, Customer may purchase and install the identified measures. Upon completion of the project and as a condition of payment, Customer must submit the Rebate Application to JEA along with all documentation specified in the Equipment Catalog. Customer must also submit an updated Lighting Workbook if the project scope has changed from the original submittal. Any amount in excess of the preapproved rebate amount will be subject to availability of Program funds. JEA reserves the right to return or reject any Lighting Workbook for a project that has not submitted all required supporting documentation within 90 days of the receipt of the initial Lighting Workbook.

**Program Rebate:** The Program offers rebates for the installation of eligible measures and rebate information including rebate amounts and rebate caps are specified in the applicable Equipment Catalog. Payment of a final rebate amount will be based on JEA's review of the completed project and satisfaction of all eligibility and Program requirements, including without limitation, verified energy savings and project cost-effectiveness and may differ from any preapproved or reserved rebate amounts. Customer understands that submission of an application or Lighting Workbook, even if correct and complete, does not guarantee payment of rebates. JEA will enforce a \$100,000 rebate cap per customer per program year across all InvestSmart programs. Customer acknowledges that receipt of any rebate pursuant to the Program Agreement may result in taxable income to the Customer, even if Customer does not directly receive a payment, and that Customer is solely responsible for payment and reporting with respect to Customer's taxes.

**Project Installations:** Customer hereby certifies that 1) the equipment has been installed and is operational at the Facility address provided above in compliance with approved specifications and Program requirements and has been accepted by Customer; 2) Customer has complied with all federal, state, and local codes and regulations for this installation and used a licensed contractor, if required. If Customer has received a project pre-approval or rebate reservation notice from JEA, Customer acknowledges that any changes in the pre-approved project scope may result in the recalculation of the pre-approved rebate identified in the notice and approval of all changes is at JEA's sole discretion. Additional rebates in excess of the pre-approved or reserved rebate amount may be subject to availability of Program funds.

**Program Funding:** Program funds are limited and rebates are subject to funding availability. Rebate applications are accepted on a first-come, first-served basis until the conclusion of the Program term, or until Program funds are no longer available, whichever occurs first.

**Terms and Conditions:** This Program Agreement incorporates by reference the JEA General Terms and Conditions ("General Terms and Conditions") located at [jea.com/investsmart](http://jea.com/investsmart). The General Terms and Conditions set forth additional terms governing Customer's participation in the Program including but not limited to limiting the liability of JEA and the Program Administrator, establishing the laws that govern this Program Agreement, and the process for disputes.

**Prescriptive Program Agreement, continued**

**Program Changes:** JEA reserves the right to change or cancel the Program or its terms and conditions at any time by providing Customer with notice via mail, fax transmission, or email at the address provided in the Customer's application, provided that material changes will only be effective if Customer communicates their assent directly or indirectly by the acceptance of Program benefits or by failing to opt out of the Program or terminate its Agreement within ten (10) business days of its receipt of notice of the proposed change, update or modification. Preapproved applications, for which a customer has completed the required Program requirements, will be processed to completion under the terms and conditions in effect at the time of the pre-approval by JEA. The terms of this section, Program Changes, will no longer be applicable after a Customer receives a rebate payment, if any.

**Entire Agreement:** The terms and conditions set forth herein, including all attachments and incorporated references, constitute a complete statement of the terms and conditions applicable to the Program and supersede all prior representations or understandings, whether written or oral. The Program Agreement may be terminated by JEA, Program Administrator or Customer at any time without cause.

**Customer Authorizations**

☐ Select if Trade Ally will submit documentation on behalf of Customer

As the Customer Representative, I acknowledge the following:

I have selected the below named Trade Ally for the installation of energy efficiency measures at the Facility listed in this Application and upon approval of the project, if such pre-approval is required, Trade Ally is authorized to submit the required documentation on my behalf for the application of rebates applicable to my project through the Program. I understand that 1) JEA and Program Administrator make no warranty or representation about the Trade Ally's qualifications 2) I am solely responsible for selecting the Trade Ally to implement the project on my behalf; 3) the Trade Ally is an independent contractor and is not authorized to may any representations on behalf of JEA or Program Administrator; and 4) that JEA and Program Administrator will have no role in resolving any disputes between me and the Trade Ally and/or any other third parties.

☐ Select to release the rebate payment to the third party listed below.

I AM AUTHORIZING JEA/PROGRAM ADMINISTRATOR TO ISSUE THE REBATE PAYMENT TO THE THIRD PARTY NAMED BELOW AND I UNDERSTAND THAT I WILL NOT BE RECEIVING THE REBATE PAYMENT CHECK FROM JEA/PROGRAM ADMINISTRATOR. I ALSO UNDERSTAND THAT MY RELEASE OF PAYMENT TO THE THIRD PARTY DOES NOT EXEMPT ME FROM THE REBATE REQUIREMENTS OUTLINED IN THE PROGRAM TERMS AND CONDITIONS. I ALSO ACKNOWLEDGE THAT ASSIGNMENT OF APPLICABLE REBATES TO ANOTHER PARTY MAY NOT AFFECT MY TAX LIABILITY FOR REBATES PAID BY THE PROGRAM.

Payee: Business Name

Contact Phone Number

Payee Mailing Address

City

State

Zip

**Signatures**

By signing below, I, the Customer Representative (and Trade Ally, if applicable) certify that:

1. I have the authority to enter into this Agreement;
2. I have read, understand, and agree to be bound by and comply with the terms set forth in this Program Agreement and such other terms as set forth in the JEA General Terms and Conditions;
3. The information provided to JEA or Program Administrator in and as part of the Rebate Application or Lighting Workbook is true and correct and I will notify JEA immediately of any changes to the information.
4. I understand and agree that the project meets all eligibility requirements for which I am applying and JEA reserves the right to request additional information to verify Customer's eligibility.
5. If I have acquired a rebate payment on the basis of an inaccurate or fraudulent application or if I mistakenly receive an amount greater than I was authorized to receive, I will refund the money back to JEA.

By signing below, Customer authorizes the selections made in the Authorizations above, if any.

Customer Representative Printed Name

Signature

Title

Date

Trade Ally Representative Printed Name

Signature

Title

Date

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, and The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct

Customer Representative Printed Name

Signature

Title

## Appendix D - Custom Application





### Application Instructions

This application is required for participation in InvestSmart Business Energy Upgrades for Custom projects with qualifying measures not found in the Lighting or Standard Programs. Complete participation information and eligibility specifications are included in the Customer Participation Manual, also available at [jea.com/investsmart](http://jea.com/investsmart).

This application packet contains the following forms:

- General Information
- Building Information
- Rebate Payment Information
- Rebate Worksheet
- Program Agreement

To participate in InvestSmart Business Energy Upgrades, please review the following steps:

1. Read the Customer Participation Manual for a complete description of program eligibility requirements and the participation process.
2. Read the Terms and Conditions found online at [jea.com/investsmart](http://jea.com/investsmart).
3. Complete the following forms included with this Rebate Application:
  - General Information – Include all required customer and account information.
  - Building Information – Include the facility type and operational characteristics to which the energy efficiency measure(s) will be applied.
  - Rebate Payment Information – Rebates will be mailed to customer's electric account billing address. If the customer would prefer the check to be designated to someone other than the customer, complete the Payment Release Information.
  - Rebate Worksheet – Include all required information including: savings calculations, supplemental documentation, and eligible project costs.
4. Purchase and Install qualifying equipment after receiving written approval from JEA. Equipment and measure eligibility is listed in the Equipment Catalog and in the Customer Participation Manual, available at [jea.com/investsmart](http://jea.com/investsmart).
5. Notify JEA of the completed project by submitting a Custom Installation Notice available for download at [jea.com/investsmart](http://jea.com/investsmart).
6. Retain a copy of all completed application forms and all required documentation, such as invoices and product specifications. Submitted applications will become the property of JEA.
7. Application forms and required documentation may be submitted by email to [jeaeficiencyrebates@bYIUbhcom](mailto:jeaeficiencyrebates@bYIUbhcom).

For more information contact us at:

InvestSmart Business Energy Upgrades  
6620 Southpoint Drive South, Suite 630  
Jacksonville, FL 32216

Online: [jea.com/investsmart](http://jea.com/investsmart) | Phone: (888) 345-4609 | Email: [jeaeficiencyrebates@bYIUbhcom](mailto:jeaeficiencyrebates@bYIUbhcom)

### General Information

Important: Please allow 4-6 weeks for your application processing following complete documentation submittal. Written approval by JEA for Custom measures rebates is required prior to equipment purchase and installation. Rebates will not be paid for ineligible or incomplete applications.

Business Name (as it appears on JEA Bill)

Federal Tax ID (EIN) (Must be 9 digits)

JEA Account Number(s) where measure(s) to be installed

Address where measure(s) to be installed

City

State

Zip

Contact Name

Phone Number

Fax Number

Email

Contact Address (if different from the installation address)

City

State

Zip

Business Classification (Check ONE. Required for all businesses, including non-profits):

☐ Individual/sole proprietor ☐ Corporation ☐ Partnership ☐ LLC ☐ Exempt ☐ Other (please describe): \_\_\_\_\_

**General Information, continued**

How did you hear about InvestSmart Business Energy Upgrades?

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Account Executive | <input type="checkbox"/> Newspaper Ad   | <input type="checkbox"/> Vendor/Contractor |
| <input type="checkbox"/> Bill Insert       | <input type="checkbox"/> JEA Electronic | <input type="checkbox"/> Newsletter/Other  |
| <input type="checkbox"/> Magazine Ad       | <input type="checkbox"/> JEA Website    |  |

**Building Information**

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Automotive Facility         | <input type="checkbox"/> Hotel                   | <input type="checkbox"/> Police/Fire Station       |
| <input type="checkbox"/> Convention Center           | <input type="checkbox"/> Library                 | <input type="checkbox"/> Post Office               |
| <input type="checkbox"/> Court House                 | <input type="checkbox"/> Manufacturing Facility  | <input type="checkbox"/> Religious Building        |
| <input type="checkbox"/> Dining: Bar Lounge/Leisure  | <input type="checkbox"/> Motel                   | <input type="checkbox"/> Retail                    |
| <input type="checkbox"/> Dining: Cafeteria/Fast Food | <input type="checkbox"/> Motion Picture          | <input type="checkbox"/> Theater School/University |
| <input type="checkbox"/> Dining: Family              | <input type="checkbox"/> Multi-Family Housing    | <input type="checkbox"/> Sports Arena              |
| <input type="checkbox"/> Dormitory                   | <input type="checkbox"/> Museum                  | <input type="checkbox"/> Town Hall                 |
| <input type="checkbox"/> Exercise Center             | <input type="checkbox"/> Office                  | <input type="checkbox"/> Transportation            |
| <input type="checkbox"/> Gymnasium Parking           | <input type="checkbox"/> Garage                  | <input type="checkbox"/> Warehouse                 |
| <input type="checkbox"/> Health Care - Clinic        | <input type="checkbox"/> Penitentiary            | <input type="checkbox"/> Workshop                  |
| <input type="checkbox"/> Hospital                    | <input type="checkbox"/> Performing Arts Theater | <input type="checkbox"/> Other _____               |

Building Size (sq. ft.) : \_\_\_\_\_

Number of Floors: \_\_\_\_\_

Year Built: \_\_\_\_\_

Percent Conditioned: \_\_\_\_\_

Annual Operating Hours: \_\_\_\_\_

Temperature Set-points:

Heating: \_\_\_\_\_ °F Cooling: \_\_\_\_\_ °F

Occupied \_\_\_\_\_ °F

Un-Occupied \_\_\_\_\_ °F

**Rebate Payment Information**Mail rebate check to: ☐ JEA Billing Address ☐ Other (complete release below)

Rebate check reference (15 character maximum) \_\_\_\_\_

**Payment Release Information**

Check should be payable to:

Payee: Business Name \_\_\_\_\_ Contact Phone Number \_\_\_\_\_

Payee Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Important: Complete this section only if rebate check is to be directed to someone other than the customer indicated on Page 1.

## Rebate Worksheet

Important: This form is to be completed and submitted as part of the Custom Application. Attach additional sheets as necessary.

Parameter	Measure 1	Measure 2	Measure 3
Project type (Retrofit or New Construction)			
Estimated Installation Date			
Dealer/Contractor Name			
Energy Efficiency Measure (type and description)			
Estimated baseline usage (kWh/yr)			
Estimated post-retrofit use (kWh/yr)			
Estimated savings (kWh/yr)			
Estimated annual operating hours			
Estimated installation costs (\$)			
Estimated rebate			
Measure Rebate (\$) (e.g. HVAC: \$50/ton x 10 tons = \$500)			
Number of Measures			
<b>Total Rebate (\$)</b> (# of Measures x Measure Rebate)	\$	\$	\$

For each energy efficiency measure listed, please list all assumptions and show all formulas used to calculate the estimated energy savings. In addition, please provide descriptions of all variables used in these formulas and example calculations for each measure. Please attach copies of site plans identifying the location of each identified energy efficiency measure. For alterations to mechanical or electrical systems, one line schematic drawings are required. Drawings shall include existing and post-retrofit conditions clearly outlining the scope of work. Please attach documentation detailing eligible project costs. Electronic copies of all files, spreadsheets, or computer simulation input files should be included with this application.

Please list contractors/vendors used \_\_\_\_\_  
for the installation of this project: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Application Checklist:

Before submitting this application please verify the following:

- Did you read and understand the eligibility requirements in the Equipment Catalog?
- Have you included a dated sales invoice?
- Did you attach any additional documentation listed in the Equipment Catalog?
- Did you include your account number?
- Did you sign the Terms and Conditions Form?

### Custom Program Agreement

This Custom Program Agreement sets forth the participation requirements for customers applying for rebates through the InvestSmart Business Energy Upgrades Custom Program ("Program"). By signing below, the customer named in the application ("Customer") is agreeing to comply with and be bound by these terms.

**Program Participation Steps:** Customers interested in participating in the Program may or may not utilize a Program approved JEA contractor ("Trade Ally") to perform the installation of eligible measures. A list of Program approved Trade Ally contractors is available at [JEA.com/investsmart](http://JEA.com/investsmart).

To be considered for rebates offered by the Program, Customer must submit a fully completed InvestSmart Business Energy Upgrades Custom Program Application, applicable attachments, and required measure documentation ("Rebate Application"), incorporated herein by reference, prior to purchasing or installing any energy efficiency equipment. Upon receipt of all required documentation from Customer and completion of any pre-inspections at the Facility, JEA will review Customer's Application and issue Customer a preapproval notice including the preapproved rebate amount. As part of the Rebate Application review process, JEA may conduct site inspection activities necessary to confirm the baseline conditions and anticipated project scope. Customer acknowledges that JEA calculates rebate amounts utilizing the project-specific data which Customer has provided on this Rebate Application and that implementation rebates for similar measures may vary from customer to customer based upon specific costs and savings. Failure to provide or complete any of the requested information or program requirements may result in the return of the Rebate Application.

**Program Funding:** Program funds are limited and rebates are subject to funding availability. Rebate applications are accepted on a first-come, first-served basis until the conclusion of the Program term, or until Program funds are no longer available, whichever occurs first.

**Terms and Conditions:** This Program Agreement incorporates by reference the JEA General Terms and Conditions ("General Terms and Conditions") located at [JEA.com/investsmart](http://JEA.com/investsmart). The General Terms and Conditions set forth additional terms governing Customer's participation in the Program including but not limited to limiting the liability of JEA and the Program Administrator, establishing the laws that govern this Program Agreement, and the process for disputes.

### Customer Authorizations

☐ Select if Trade Ally will submit documentation on behalf of Customer

As the Customer Representative, I acknowledge the following:

I have selected the below named Trade Ally for the installation of energy efficiency measures at the Facility listed in this Rebate Application and upon approval of the project, if required, Trade Ally is authorized to submit the required documentation on my behalf for the application of rebates applicable to my project through the Program. I understand that 1) JEA and Program Administrator make no warranty or representation about the Trade Ally's qualifications 2) I am solely responsible for selecting the Trade Ally to implement the project on my behalf; 3) the Trade Ally is an independent contractor and is not authorized to make any representations on behalf of JEA or Program Administrator; and 4) that JEA and Program Administrator will have no role in resolving any disputes between me and the Trade Ally and/or any other third parties.

☐ Select to release the rebate payment to the third party listed below.

I AUTHORIZE JEA/PROGRAM ADMINISTRATOR TO ISSUE THE REBATE PAYMENT TO THE THIRD PARTY NAMED BELOW AND I UNDERSTAND THAT I WILL NOT BE RECEIVING THE REBATE PAYMENT CHECK FROM THE PROGRAM. I ALSO UNDERSTAND THAT MY RELEASE OF PAYMENT TO THE THIRD PARTY DOES NOT EXEMPT ME FROM THE REBATE REQUIREMENTS OUTLINED IN THE PROGRAM TERMS AND CONDITIONS. I ALSO ACKNOWLEDGE THAT ASSIGNMENT OF APPLICABLE REBATES TO ANOTHER PARTY MAY NOT AFFECT MY TAX LIABILITY FOR REBATES PAID BY THE PROGRAM.

Payee: Business Name

Contact Phone Number

Payee Mailing Address

City

State

Zip

**Signatures**

By signing below, I, the Customer Representative (and Trade Ally, if applicable) certify that:

1. I have the authority to enter into this Agreement;
2. I have read, understand, and agree to be bound by and comply with the terms set forth in this Program Agreement and such other terms as set forth in the JEA General Terms and Conditions;
3. The information provided to JEA or Program Administrator in and as part of the Rebate Application or Lighting Workbook is true and correct and I will notify JEA immediately of any changes to the information.
4. I understand and agree that the project meets all eligibility requirements for which I am applying and JEA reserves the right to request additional information to verify Customer's eligibility.
5. If I have acquired a rebate payment on the basis of an inaccurate or fraudulent application or if I mistakenly receive an amount greater than I was authorized to receive, I will refund the money back to JEA.

By signing below, Customer authorizes the selections made in the Authorizations above, if any.

Customer Representative Printed Name	Signature	Title	Date
Trade Ally Representative Printed Name	Signature	Title	Date

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, and The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct

Customer Representative Printed Name	Signature	Title
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## Appendix E - Custom Installation Notice

**General Information**

**Important:** Please allow 4-6 weeks for your application processing following complete documentation submittal. Written approval by JEA for Custom measures rebates is required prior to equipment purchase and installation. Rebates will not be paid for ineligible or incomplete applications.

Business Name (as it appears on JEA Bill)

JEA Account Number(s) where measure(s) to be installed

Address where measure(s) to be installed

City

State

Zip

Contact Name

Phone Number

Fax Number

Email

Contact Address (if different from the installation address)

City

State

Zip

**Payment Release Information**

**Important:** Complete this section only if rebate check is to be directed to someone other than the customer indicated above.

I AM AUTHORIZING THIS REBATE PAYMENT TO THE THIRD PARTY NAMED BELOW AND I UNDERSTAND THAT I WILL NOT BE RECEIVING THE REBATE PAYMENT CHECK FROM JEA. I ALSO UNDERSTAND THAT MY RELEASE OF PAYMENT TO THE THIRD PARTY DOES NOT EXEMPT ME FROM THE REBATE REQUIREMENTS OUTLINED IN THE APPLICATION.

Authorized by (please print)

Signature of Authorized

Date

Check should be payable to:

Payee: Business Name

Contact Phone Number

Federal Tax ID (EIN) or Social Security number

Payee Mailing Address

City

State

Zip

**Customer Signature**

By signing below, Applicant represents, warrants, acknowledges and agrees that:

- I have read and understand all Terms and Conditions, customer eligibility, measure eligibility, and participation procedures for Custom Business Energy Upgrades.
- I hereby certify that the energy efficiency measure(s) described in the approved Custom Application has/have been installed on \_\_\_\_\_ (date) following all approved specifications.
- Changes in scope of the installed measure(s) from the approved Custom Application, if any, have been included with this
- Custom Installation Notice in the form of an updated Custom Application. I understand that the approval of any changes is at JEA's sole discretion and is subject to program rules and rebate funding availability.
- I certify that all the information contained within is true and factual.

**Business Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Name (please print):** \_\_\_\_\_

**Title:** \_\_\_\_\_

This Custom Installation Notice may be submitted by email to: [jeaeficiencyrebates@jea.com](mailto:jeaeficiencyrebates@jea.com)

InvestSmart Business Energy Upgrades  
6620 Southpoint Drive South, Suite 630  
Jacksonville, FL 32216  
(888) 345-4609

## Appendix F - HVAC Tune-up Form



# InvestSmart with JEA Business Energy Upgrades HVAC Tune-up Form



## INSTRUCTIONS

- 1) HVAC tune-ups must be serviced and tested in accordance with the requirements specified within the 2018 Customer Participation Manual (e.g. refrigerant charge requirements, etc.).
- 2) HVAC contractors are required to complete the appropriate sections of this form as applicable. This rebate requires quality work and accurate documentation.
- 3) This form must be signed by the service technician who performed the system measurements and verified all data and the business owner/representative.
- 4) InvestSmart with JEA must receive a completed copy of this form along with all required supplemental documentation prior to release of a rebate check.
- 5) Actions taken during HVAC tune-ups are intended to reduce energy consumption through improved efficiency. All deficient items must be repaired or replaced in order to qualify for rebate.

## CONTRACTOR'S INFORMATION

HVAC Contractor's Name \_\_\_\_\_

Technician's Name (printed) \_\_\_\_\_

Certification# (if applicable) \_\_\_\_\_

License # \_\_\_\_\_

Date of tune-up \_\_\_\_\_

## CUSTOMER'S INFORMATION

Customer's Name \_\_\_\_\_

Premise# or Service Address \_\_\_\_\_

Customer's Phone # (\_\_\_\_\_) \_\_\_\_\_

Number of units tuned-up \_\_\_\_\_

JEA Account # \_\_\_\_\_

## STEP 1- CONDENSING UNIT (SPLIT SYSTEMS) OR PACKAGE UNIT INFORMATION (REQUIRED)

Unit No.	Make (Brand)	Model Number	Serial Number	Unit Location or Designation & Area Served (Identifying it from other units at this location)	Age (yrs)	Cooling (BTU/ton)	HP Heating (BTUh)
1							
2							
3							
4							

## STEP 2- MATCHING AIR HANDLER (FAN/COIL) OR FURNACE INFORMATION (REQUIRED)

Unit No.	Make (Brand)	Model Number	Serial Number	Air Handler Unit Location	Furnace Fuel Input (BTUh)	Nat. Gas or LP	Strip Heat kW
1							
2							
3							
4							

## STEP 3- CONTROLS (REQUIRED)

Unit No.	Measured Control Volts	Type Thermostat Manual/Auto/Prog.	Clg Set Point	Htg. Set Point	T'stat turns unit on/off at set points	If no, t'stat must be repaired	T'stat mounted on outside wall or near a heat source	If yes, heat source must be moved or t'stat insulated from outside wall
1								
2								
3								
4								

**STEP 4 – ELECTRICAL POWER (REQUIRED)**

Unit No.	System Operating Voltage	Phase	Compressor Rated Amps	Compressor Actual Amps	Cond. Fan Rated Amps	Cond. Fan Actual Amps	Evap. Fan Rated Amps	Evap. Fan Actual Amps	All Connections Tightened
1									
2									
3									
4									

**STEP 5 – FANS AND AIR FLOW (REQUIRED)**

Unit No.	Measured TD Across Indoor Coil**	Indoor Coil Cleaned & Inspected	Outdoor Coil Cleaned & Inspected	Fan Motor Bearings Lubricated	Filter Cleaned or Replaced	Clean Cond. Drains flows freely
1						
2						
3						
4						

**STEP 6 – REFRIGERANT CHARGE (REQUIRED)**

Unit No.	Refrigerant Type	Outdoor Temp.	Suction Pressure	Discharge Pressure	Repair any leaks and properly recharge	Is Suction Line fully insulated	Refrigerant Added or removed
1							
2							
3							
4							

**STEP 7 – TECHNICIAN'S & OWNER'S/REP. SIGNATURE (REQUIRED)**

I hereby certify that all HVAC equipment has been serviced in accordance with the manufacturer's/program guidelines, and that all the above information is accurate. I understand that JEA requires a completed copy of this document and all essential supplemental information prior to final processing of rebate requests.

Signature Service Technician:

\_\_\_\_\_

Date: \_\_\_\_\_

Signature of Business Owner/Rep:

\_\_\_\_\_

Date: \_\_\_\_\_

## Appendix G - Lighting Equipment Catalog

2018



# **InvestSmart Business Energy Upgrades Lighting Equipment Catalog**

*01/01/2018*

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## 1 Lighting Improvement Measures

This Equipment Catalog describes the eligibility requirements and rebate amounts for qualifying Lighting technologies under the InvestSmart Business Energy Upgrades. It also includes information regarding any required additional documentation. JEA provides rebates for many types of energy efficient technologies. Please read the following sections carefully to ensure that you purchase and install qualifying equipment.

In order to be eligible for rebates through InvestSmart, all equipment must meet the following requirements:

- Equipment must be new and installed in a manner that meets or exceeds code regulations and adheres to industry standards.
- Equipment may be installed in either retrofit or new construction/major renovation applications.
- Replaced equipment must be disposed of in accordance with local, state, or federal codes and regulations and cannot be re-installed elsewhere.
- Rebates will be capped at 50% net customer cost and a possible rebate buy-down to a simple payback of no less than 1 year. Rebates will be capped at \$100,000 per customer per program year.

Pre-qualification of Business Energy Upgrades eligible measures is required for **retrofit lighting equipment and occupancy sensors**. Additional eligibility and submittal requirements for **Lighting** technologies are outlined in this Equipment Catalog.

For more information about rebates, eligibility requirements, rebate levels, other JEA energy efficiency programs, or general inquiries, visit [jea.com/investsmart](http://jea.com/investsmart), email [jeaefficiencyrebates@nexant.com](mailto:jeaefficiencyrebates@nexant.com), or contact the Customer Service Center at 888-345-4609.

### 1.1 Lighting

#### Measure Description:

InvestSmart offers rebates for qualifying lighting equipment and energy efficiency improvements. The eligibility requirements and rebate levels for lighting equipment are described below.

#### Applicability:

Rebates are available for lighting equipment installed as part of a new construction or retrofit project. Lighting retrofit project applicants must submit a Lighting Workbook prior to equipment purchase and installation.



**Eligibility:**

Lighting equipment that results in a verifiable installed wattage reduction is eligible for a rebate, provided that the following criteria are met:

**Retrofit Lighting:**

- LED lights must be qualified as Premium Design Light Consortium (DLC) or Energy Star. The list of DLC qualified products are found in the following web site [www.designlights.org/QPL](http://www.designlights.org/QPL). New DLC qualifying equipment must be DLC Premium. DLC standard is not acceptable.
- The LED lights must be a complete retrofit. Screw-in LEDs are not allowed as they do not provide the commitment to the upgrade that JEA requires to confidently report the energy savings. LED tube lights that are installed into existing fixtures must have the ballasts removed and replaced with a dedicated LED driver in order for it to be an acceptable retrofit. Integrated LED tubes (Type "A") and Bypass LED tubes (Type B") will not be accepted.
- New T8 or T5 fluorescent lamps retrofitted to existing fixtures must be rated at 80 CRI or higher and 90 lumens or higher per watt with associated ballasts having a power factor of at least 0.90 and a total harmonic distortion of less than 20% or be a qualifying lamp under the Consortium for Energy Efficiency (CEE) High-Performance Commercial Lighting Systems Initiative<sup>1</sup>. Fixture replacements must also meet these minimum eligibility standards.
- Retrofit work involving de-lamping is eligible provided that the capability to re-install additional lamps into a fixture is eliminated (this includes permanent removal of lamp, ballast, socket, and/or luminaires) and is accompanied by an upgrade to qualifying lighting equipment at the same time.
- Eligible HID fixtures include pulse start metal halide.

**Ineligible Lighting Measures:**

- Measures with energy savings due solely to behavioral changes.
- T12 fluorescent lighting.
- Incandescent and screw-in compact fluorescent lamps (CFLs) and screw in LED lamps.
- Standard metal halide, mercury vapor, or any high pressure sodium lighting.
- De-lamping without upgrading to qualifying lighting equipment.
- Pin based LED replacing compact fluorescent using fluorescent ballasts
- Exit sign replacement

**Items to submit prior to equipment purchase and installation:**

- Lighting Workbook.

**Items to submit after equipment purchase and installation:**

- Lighting Workbook (if project scope changed from the original submittal).
- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not

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<sup>1</sup> Qualifying lamps are listed on CEE's website at [www.cee1.org/com/com-lt/com-lt-main.php3](http://www.cee1.org/com/com-lt/com-lt-main.php3).

submitted all required supporting documentation within 90 days of the receipt of the initial lighting workbook.)

**Instructions for Rebate Application:**

The application process for **Lighting** measures is not the same as the application submittal for the Standard Measures in the other Equipment Catalogs: HVAC Equipment; Refrigeration Equipment; Cool Roof and Window Film; and Water Heating Equipment. Lighting projects require the submittal of a Lighting Workbook which can be obtained by contacting InvestSmart with JEA at [jeaefficiencyrebates@nexant.com](mailto:jeaefficiencyrebates@nexant.com), or 888-345-4609 or a participating Trade Ally. Follow the instructions accompanying the spreadsheet to determine the electrical reduction and rebate amount expected from your lighting project.

**Measure Rebate:**

- Rebates for lighting equipment are paid at \$0.15 per watt of reduced installed wattage. The Lighting Workbook computes the wattage reduction when the required product (existing and proposed) information is entered into the spreadsheet. Rebates will be capped at 50% net customer cost and a possible rebate buy-down to a simple payback of no less than 1 year. Rebates will be capped at \$100,000 per customer per program year.

## 1.2 Occupancy Sensors

**Measure Description:**

Lighting occupancy sensors can reduce electrical energy consumption by turning off lighting equipment when occupants are not present.

**Applicability:**

Retrofit and New Construction installations, where not required by ASHRAE 90.1-2004, are eligible.

**Eligibility:**

Incentives will be offered to customers installing lighting controls as a part of retrofit or new construction / major renovation projects provided the measures meet the following requirements:

- Sensors must be new and installed in a manner that meets or exceeds code regulations
- Sensors or control must be hard-wired and permanently installed (no plug-based sensors)
- Installations must comply with manufacturer's guidelines on coverage and maximum controlled watts

The eligibility criteria for lighting occupancy sensors are:

- Sensors can be passive infrared, ultrasonic, or dual-technology
- Wall or fixture mounted sensors must control a minimum of 200 watts
- Ceiling mounted sensors must control a minimum of 400 watts
- Sensors or installations with the ability to disable sensor function (other than for maintenance) are NOT eligible

**Items to submit prior to equipment purchase and installation:**

- Lighting Workbook

**Items to submit after equipment purchase and installation:**

- Lighting Workbook (if project scope changed from the original submittal)
- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial lighting workbook.)
- Manufacturer's equipment specification sheet demonstrating compliance with equipment eligibility requirements

**Instructions for Rebate Application:**

The application process for **Lighting** measures is not the same as the application submittal for the Standard Measures in the other Equipment Catalogs: HVAC Equipment; Refrigeration Equipment; Cool Roof and Window Film; and Water Heating Equipment. Lighting projects require the submittal of a Lighting Workbook which can be obtained by contacting InvestSmart with JEA at [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com), or 888-345-4609, or a participating Trade Ally. Follow the instructions accompanying the spreadsheet to determine the electrical reduction and rebate amount expected from your lighting project.

**Measure Rebate:**

Rebate amounts for qualifying occupancy sensors are located in the following **Table 1-1**.

Measure	Rebate
Switch-Mounted or Fixture Mounted Lighting Occupancy Controls (Infrared or Dual Technology)	\$10/sensor
Ceiling-Mounted Lighting Occupancy Controls (Infrared or Dual Technology)	\$20/sensor

**Table 1-1 Lighting Controls Rebate Amounts**

## Appendix H - HVAC Equipment Catalog

2018



# **InvestSmart Business Energy Upgrades HVAC Equipment Catalog**

*01/01/2018*

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# 1 HVAC Measures

This Equipment Catalog describes the eligibility requirements and rebate amounts for qualifying HVAC measures under the InvestSmart Program Business Energy Upgrades. It also includes instructions on how to complete the Rebate Application and information regarding any required additional documentation. JEA provides rebates for many types of energy efficient technologies. Please read the following sections carefully to ensure that you purchase and install qualifying equipment.

In order to be eligible for rebates through InvestSmart, all equipment must meet the following requirements:

- Equipment must be new and installed in a manner that meets or exceeds code regulations and adheres to industry standards.
- Equipment may be installed in either retrofit or new construction/major renovation applications, except where indicated in individual measures.
- Replaced equipment must be disposed of in accordance with local, state, or federal codes and regulations and cannot be re-installed elsewhere.
- Rebates will be capped at 50% net customer cost (with the exception of PTAC units, which are capped at 90% net customer cost) and a possible rebate buy-down to a simple payback of no less than 1 year. Rebates will be capped at \$100,000 per customer per program year.

Pre-qualification of Business Energy Upgrades eligible measures is not required **except** for retrofit lighting equipment and occupancy sensors. Additional eligibility and submittal requirements for **HVAC** technologies are outlined in this Equipment Catalog.

Rebates for additional measures may be available. For more information about rebates, eligibility requirements, rebate levels, other JEA energy efficiency programs, or general inquiries, visit [jea.com/investsmart](http://jea.com/investsmart), email us at [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com), or contact Customer Service Center 888-345-4609.

## 1.1 Unitary Air Conditioners and Air Cooled Heat Pumps

### Measure Description:

JEA offers rebates for higher efficiency air-cooled unitary HVAC equipment based on the Air-Conditioning, Heating, and Refrigeration Institute (AHRI) standards. The eligibility requirements and rebate levels are described below.

### Equipment Eligibility:

- Heat pumps and unitary air conditioners are eligible for rebates if they are air-cooled units that meet or exceed all of the applicable efficiency ratings shown in **Table 1-1** for air conditioning units and **Table 1-2** and **1-3** for heat pump units at AHRI Standard Rating Conditions.
- Equipment must be efficiency rated by AHRI, meet applicable AHRI standards, be UL listed and use a minimum ozone-depleting refrigerant.





- Split system equipment components must comprise a matched system per AHRI.
- Units located within  $\frac{1}{2}$  mile of the oceanfront, or within the distance recommended by the equipment manufacturer, whichever is greater, must have corrosion resistant outside coil materials or coils coated with a factory-applied (or equal), anti-corrosive coating. Corrosion resistance must meet or exceed ASTM B117.85 standards.

#### Exclusions:

Window and room air conditioners are **not** eligible for these rebates.

#### Rebates:

Two levels of rebates are available for three-phase air-cooled unitary air conditioners and heat pumps based on the AHRI-rated cooling capacity of the installed equipment. Rebates will be paid for the highest efficiency for which the unit qualifies (Level 1 or Level 2, not both). A flat \$150/unit rebate is available for qualifying single-phase air-cooled unitary heat pumps based on the AHRI-rated cooling capacity of the installed equipment.

The rebate levels are as follows (1 ton = 12,000 Btu/h):

Level 1: \$25/ton and \$20/ton of cooling capacity for unitary air conditioners and heat pumps, respectively

Level 2 (for units <65,000 Btu/h): \$40/ton + [(\$15/ton) x (SEER – SEER<sub>min</sub>)] of capacity for air conditioners  
\$30/ton + [(\$15/ton) x (SEER – SEER<sub>min</sub>)] of capacity for heat pumps

Where: SEER is the efficiency rating of the installed unit

SEER<sub>min</sub> is the minimum efficiency requirement for Level 2 in **Tables 1-1 & 1-2**

Level 2 (for units ≥65,000 Btu/h): \$40/ton + [(\$15/ton) x (IEER – IEER<sub>min</sub>)] of capacity for air conditioners  
\$30/ton + [(\$15/ton) x (IEER – IEER<sub>min</sub>)] of capacity for heat pumps

Where: IEER is the efficiency rating of the installed unit

IEER<sub>min</sub> is the minimum efficiency requirement for Level 2 in **Tables 1-1 & 1-2**

#### Examples:

- 10 ton, 12.4 EER, 12.5 IEER AC Unit qualifies for “Level 1” \$25/ton rebate:  
\$25 x 10 tons = \$250 rebate
- 10 ton, 12.9 EER, 13.0 IEER AC Unit qualifies for “Level 2” \$40/ton rebate:  
\$40 x 10 tons = \$400 rebate
- 10 ton, 13.0 EER, 13.1 IEER AC Unit qualifies for “Level 2” \$40/ton rebate plus bonus rebate for exceeding Level 2 minimum efficiency requirement:  
\$40 x 10 tons = \$400 base rebate, plus  
\$15/ton x (13.0 IEER – 13.5 IEER) = \$7.50 x 10 tons = \$75 bonus rebate  
Total: \$400 + \$75 = \$475 rebate



**Items to submit with Rebate Application:**

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturers specification sheets documenting efficiency or unit AHRI reference number(s).

**Instructions for Rebate Application:**

In the Rebate Application, fill in the following:

- “Efficiency” as the AHRI SEER or IEER and EER value (whichever applies)
- “Measure Size” as the AHRI-rated cooling capacity at Standard Test Conditions in tons (1 ton = 12,000 Btu/h).

**Table 1-1 Three Phase Air-Cooled Unitary Air Conditioners**

**Eligibility Requirements and Rebate Amounts**

AC Size	System Type	Equipment Code	Level 1 \$25/ton Requirements	Level 2 \$40/ton+ Requirements
<65,000 Btu/h	Split System	AC3SS65	14.0 SEER 12.0 EER	≥15.0 SEER ≥12.5 EER
	Single Package	AC3SP65	14.0 SEER 11.6 EER	≥15.0 SEER ≥12.0 EER
≥65,000 Btu/h and <135,000 Btu/h	Split System and Single Package	AC135	12.4 EER 12.5 IEER	≥12.9 EER ≥13.0 IEER
≥135,000 Btu/h and <240,000 Btu/h	Split System and Single Package	AC240	12.0 EER 12.1 IEER	≥12.5 EER ≥12.6 IEER
≥240,000 Btu/h and <760,000 Btu/h	Split System and Single Package	AC760	11.0 EER 11.1 IEER	≥11.3 EER ≥11.4 IEER
≥760,000 Btu/h	Split System and Single Package	ACL	10.2 EER 10.3 IEER	≥10.7 EER ≥10.8 IEER

**Table 1-2 Three Phase Air-Cooled Unitary Heat Pumps****Eligibility Requirements and Rebate Amounts**

HP Size	System Type	Equipment Code	Level 1 \$20/ton Requirements	Level 2 \$30/ton+ Requirements
<65,000 Btu/h	Split System	HP3SS65	14.0 SEER 12.0 EER 8.0 HSPF	≥15.0 SEER ≥12.5 EER ≥9.0 HSPF
	Single Package	HP3SP65	14.0 SEER 11.6 EER 8.0 HSPF	≥15.0 SEER ≥12.0 EER ≥8.5 HSPF
≥65,000 Btu/h and <135,000 Btu/h	Split System and Single Package	HP135	12.4 EER 12.5 IEER 3.5 COP	≥12.9 EER ≥13.0 IEER ≥3.6 COP
≥135,000 Btu/h and <240,000 Btu/h	Split System and Single Package	HP240	12.0 EER 12.1 IEER 3.3 COP	≥12.5 EER ≥12.6 IEER ≥3.5 COP
≥240,000 Btu/h and <760,000 Btu/h	Split System and Single Package	HP760	11.0 EER 11.1 IEER 3.3 COP	≥11.3 EER ≥11.4 IEER ≥3.3 COP

**Table 1-3 Single Phase Air-to-Air Unitary Heat Pumps & Single Phase Air Conditioners****Eligibility Requirements and Rebate Amounts**

HP/AC Size	System Type	Equipment Code	Minimum Efficiency Requirements	Rebate (\$/system)
<65,000 Btu/h (single phase)	Split System and Packaged	HP1SS65	15.0 SEER 12.5 EER 8.5 HSPF	\$150/System

## 1.2 Chillers

### Measure Description:

Chillers are commonly used to provide cooling for a variety of building HVAC cooling loads and process loads. Chillers come in different types (centrifugal, rotary, screw, scroll, and reciprocating) and reject heat either through air-cooled or water-cooled condensers. High efficiency chillers can yield significant long term energy cost savings compared to standard efficiency units.

### Equipment Eligibility:

Chillers must:

- Be purchased and installed.
- Equal or exceed the minimum efficiency requirements per **Table 1-4** below as rated in accordance with ARI Standard 550/590.
- Reflect Variable Frequency Drives (VFD) installed on the chiller compressor in the Integrated Part Load Value (IPLV) kW/ton rating, if applicable.
- Not be a backup service unit.
- Air-cooled condensers located within  $\frac{1}{2}$  mile of the oceanfront, or within the distance recommended by the equipment manufacturer, whichever is greater, must have corrosion resistant outside coil materials or coils coated with a factory-applied (or equal), anti-corrosive coating. Corrosion resistance must meet or exceed ASTM B117.85 standards.

### Items to submit with Rebate Application:

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer's equipment specification sheet showing the unit's Full Load and IPLV kW/ton ratings at ARI rated conditions.

### Instructions for Rebate Application:

In the Rebate Application, fill in the following:

- "Efficiency" as the AHRI-rated IPLV kW/ton rating (including impacts of compressor VFD if applicable)
- "Measure Size" as the AHRI-rated cooling capacity at Standard Test Conditions in tons (1 ton = 12,000 Btu/hr)

### Measure Rebate:

Equipment that meets the minimum Full Load and IPLV (in kW/ton) efficiency requirements shown in **Table 1-4** will be paid an equipment rebate of \$5/ton.

For units **exceeding** the minimum efficiency requirements, an **additional rebate** of \$175/ton times the IPLV efficiency increase in kW/ton above the minimum efficiency is paid using the following equation (lower



IPLV kW/ton = higher efficiency):

$$\text{Chiller Rebate} = (\text{Tons} \times \$5/\text{ton}) + (\text{Tons} \times \$175/\text{kW} \times (\text{Min Eligible IPLV kW/ton} - \text{Chiller rated IPLV kW/ton}))$$

**Example:** The rebate for a 200 ton air-cooled chiller with an IPLV kW/ton of 0.79 kW/ton is:

$$(200 \text{ tons} \times \$5/\text{ton}) + (200 \text{ tons} \times \$175/\text{kW} \times (0.910 \text{ kW/ton} - 0.79 \text{ kW/ton})) = \$5,200$$

Chiller Type	Size (Tons)	Equipment Code	Minimum Program Requirements				Rebate
			Path A		Path B		
			Full Load (kW/Ton)	IPLVmin (kW/Ton)	Full Load (kW/Ton)	IPLVmin (kW/Ton)	
Air Cooled With Condenser	All	CHAC	1.255	0.910	NA	NA	\$5 * Tons + \$175 * Tons * (IPLVmin - IPLV)
Air Cooled Without Condenser	All	CHNC	1.255	0.910	NA	NA	
Water Cooled Positive Displacement (Rotary, Screw, Scroll, Reciprocating)	< 75	CHWC-SC075	0.780	0.590	0.800	0.560	
	≥ 75 & < 150	CHWC-SC150	0.775	0.580	0.790	0.551	
	≥ 150 & < 300	CHWC-SC300	0.680	0.550	0.718	0.510	
	≥ 300	CHWC-SCL	0.620	0.510	0.639	0.460	
Water Cooled Centrifugal	< 300	CHWC-CE300	0.634	0.570	0.639	0.424	
	≥ 300 & < 600	CHWC-CE600	0.576	0.520	0.600	0.371	
	≥ 600	CHWC-CEL	0.570	0.510	0.590	0.371	

**Table 1-2 – Chiller Eligibility Requirements and Rebate Amounts**

### 1.3 Packaged Terminal Units

#### Measure Description:

Packaged Terminal Air Conditioners (PTACs) and Packaged Terminal Heat Pumps (PTHPs) are designed primarily to provide cooling (and heating for heat pumps) for a room or small zone and are specifically for permanent through-the-wall installations. These electrically-powered units are generally sized under 13,500 Btu/hr, are typically designed to be installed in a separate through-the-wall sleeve on an exterior wall, and are typically found in hotels. This is not the same as a window unit air conditioner or heat pump adapted for through-the-wall use.

#### Equipment Eligibility:

- PTAC and PTHP units must have AHRI-certified efficiencies that meet or exceed the minimum requirements shown in **Table 1-5**. Heat Pumps must meet both efficiency requirements.

- All units located **within ½ mile of the oceanfront, or within the distance recommended by the equipment manufacturer, whichever is greater**, must have corrosion resistant outside coil materials or coils coated with a factory-applied (or equal), anti-corrosive coating. Corrosion resistance must meet or exceed ASTM B117.85 standards.

#### Items to submit with Rebate Application:

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturers specification sheets documenting unit ARI reference number(s) and efficiency(ies).

#### Instructions for Rebate Application:

In the Rebate Application, fill in the following:

- “Efficiency” as the AHRI SEER and EER value (whichever applies)
- “Measure Size” as the AHRI-rated tons of the unit (1 ton = 12,000 Btu/hr)

#### Measure Rebate:

Rebate amounts for qualifying measures are listed below in **Table 1-5**.

Table 1-5 – Packaged Terminal Units Eligibility Requirements and Rebate Amounts

Equipment Type	Size Category	Equipment Code	Minimum Efficiency Requirements	AHRI Standard	Rebate (\$/ton)
Package Terminal Air Conditioners (PTAC)	≤ 8,000 Btu/hr	PTAC80	11.8 EER	310/380	\$50/ton
	> 8,000 and ≤ 10,000 Btu/hr	PTAC105	11.4 EER		
	> 10,000 and ≤ 13,000 Btu/hr	PTAC135	10.7 EER		
	> 13,000 Btu/hr	PTACL	10.0 EER		
Package Terminal Heat Pumps (PTHP)	≤ 8,000 Btu/hr	PTHP80	11.8 EER & 3.0 COP Heating	310/380	
	> 8,000 and ≤ 10,000 Btu/hr	PTHP105	11.4 EER & 2.9 COP Heating		
	> 10,000 and ≤ 13,000 Btu/hr	PTHP135	10.7 EER & 2.8 COP Heating		
	> 13,000 Btu/hr	PTHPL	10.0 EER & 2.7 COP Heating		

## 1.4 Air Conditioner and Heat Pump Tune-Ups

### Measure Description:

JEA offers rebates for “Tune-Ups” of existing air conditioning and heat pump systems. The eligibility requirements and rebate levels are described below. PTACs and PTHPs are not eligible for these rebates.

### Equipment Eligibility:

The requirements for eligibility for an Air Conditioner and Heat Pump “Tune-up” rebate are:

- Equipment must meet refrigerant charge requirements.
- The Air Conditioner and Heat Pump Tune-Up form must be completed by a qualified technician.
- Equipment must be a minimum of 3 years old and not received a tune up rebate in the last 3 years.

### Items to submit with Rebate Application:

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer’s specification sheets documenting efficiency or unit AHRI reference number(s).
- Heat pump tune-up form which can be found at [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com), or by contacting Customer Service Center at 888-345-4609.

### Instructions for Rebate Application:

In the Rebate Application, fill in the following:

- “Measure Size” as the AHRI-rate cooling capacity at Standard Test Conditions in tons (1 ton=12,000Btu/h).
- “Efficiency” as the AHRI SEER or IEER value (whichever applies)

The rebate for air-cooled unitary air conditioners and heat pumps will be paid according to **Table 1-6** below.

**Table 1-6 – Air Conditioner and Heat Pump Tune-Up Rebate Amount**

Rebate Measure	Equipment Code	Rebate (\$/system)
Air Conditioner and Heat Pump Tune-Up	HPTU	\$50/system

## 1.5 Variable Frequency Drives (VFDs) For HVAC Equipment

### Measure Description:

Variable Frequency Drives (VFDs) are electronic controls that regulate motor speed and torque, resulting in reduced energy consumption under variable load conditions.



**Equipment Eligibility:**

Incentives are offered to customers installing VFDs on HVAC equipment in a retrofit or new construction application provided that the following criteria are met:

- VFDs are installed on motors capable of reduced speed operation.
- VFDs are installed on fan or pump motors greater than or equal to 1 HP and less than or equal to 200 HP, and these motors are serving HVAC loads (e.g. air handling units, chilled water pumps, etc.).
- Previously installed throttling or bypass devices used as system load controls such as inlet vanes, bypass dampers, three-way valves, or throttling valves are permanently removed, retrofitted, or disabled temperature.
- VFD speed is automatically controlled by appropriate means, such as differential pressure, flow, or temperature.

**Exclusions:**

The following VFD measures are excluded from consideration for rebates:

- Variable frequency drives required by IECC 2006 (e.g., VAV fan motors greater than 25 HP in New Construction projects)
- VFDs on chillers or air compressors
- Fan and pump motors that would otherwise be regulated by on/off cycling
- Used or rebuilt VFDs
- Motors with less than 2,000 annual operating hours

VFDs larger than 200 HP and VFDs installed on chillers, air compressors, or non-HVAC equipment may qualify as Custom Business Energy Upgrades. For more information, visit the InvestSmart website at [jea.com/investsmart](http://jea.com/investsmart) before you purchase your equipment.

**Items to submit with Rebate Application:**

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)

**Instructions for Rebate Application:** In the Rebate Application, fill in the following:

- “Efficiency” as “NA”
- “Measure Size” as the nameplate motor HP

**Measure Rebate:**

The rebate amount for qualifying measures is listed below in **Table 1-7**.





Table 1-7– VFD Eligibility Requirements and Rebate Amount

Equipment Code	Measure Description	Rebate (\$/unit)
VFD	VFD $\geq$ 1 HP and $\leq$ 200 HP	\$50/HP

## 2 Sample Rebate Worksheet

The following is an example for (2) 4-ton, Single Package, High Efficiency (14 SEER) Unitary Air Conditioner and (2) newly installed 10 HP VFDs.

Parameter	Measure 1	Measure 2	Measure 3
Equipment Code	AC3SP65	VFD	
Project Type (Retrofit or New Construction)	Retrofit	New Construction	
Installation Date	1/1/2012	1/1/2012	
Equipment Location (e.g. Roof, Mechanical Room)	Roof	Mechanical Room	
Equipment End Use (e.g. Supply Fan, CHW Pump)	Heating & Cooling – Office Space	Supply Fan	
Age of replaced equipment (for Retrofits)	25	NA	
Dealer Name	Acme HVAC	Acme VFDs	
Manufacturer	Widget, LLC	Widget VFD, LLC	
Model Number	MNABC123	ABC123	
Serial Number (if no serial number, use NA)	X14G234789356	Y2499475023857	
Annual Operating Hours	4,000	5,304 (see Schedule)	
Efficiency(ies) (as described in Equipment Catalog)	14.0 SEER		
Measure Size (as described in Equipment Catalog)	4 tons	10HP	
Measure Rebate (\$) (as found in equipment catalog at <a href="http://jea.com">jea.com</a> )	\$25/ton x 4 tons	\$500	
Number of Measures	2	2	
Total Rebate (\$) (# of Measures * Measure Rebate)	\$200	\$1000	

Please refer to the appropriate table in the HVAC Equipment Catalog

Your company's name or Installing Contractor

8,760= Refrigeration  
4,320= HVAC, etc 12hrs/day

**Cooling ONLY—3 phase**  
 <65,000 Btu = SEER & EER  
 >65,000 Btu = EER & IEER  
**Heat pumps ONLY—3phase**  
 <65,000 Btu = SEER, EER & HSPF  
 >65,000 Btu = EER, IEER & COP rating  
 <65,000 Btu = SEER, EER & HSPF

### Equipment Schedule for VFD's

Days	Hours	Annual Hours
Monday - Friday	6am - 8pm	3,640
Saturday - Sunday	6am - 10pm	1,664
	<b>Total</b>	<b>5,304</b>

**\*\*Be sure to include a copy of the invoice indicating the total project cost (differentiating the labor and material)\*\***



#### To locate equipment catalog:

- [www.jea.com/InvestSmart](http://www.jea.com/InvestSmart)
- Select HVAC
- Select HVAC Rebate Details and Eligibility

## Appendix I - Cool Roof and Window Film Equipment Catalog

2018



# **InvestSmart Business Energy Upgrades Cool Roof and Window Film Equipment Catalog**

*01/01/2018*

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## 1 Cool Roof and Window Film

This Equipment Catalog describes the eligibility requirements and rebate amounts for qualifying Cool Roof and Window Film measures under the InvestSmart Business Energy Upgrades. It also includes instructions on how to complete the Rebate Application and information regarding any required additional documentation. JEA provides rebates for many types of energy efficient technologies. Please read the following sections carefully to ensure that you purchase and install qualifying equipment.

In order to be eligible for rebates below through InvestSmart, all work and equipment must meet the following requirements:

- Equipment must be new and installation must be performed in a manner that meets or exceeds code regulations and adheres to industry standards.
- Eligible energy efficiency improvements may be installed in either retrofit or new construction/major renovation applications, except where noted in the individual measures.
- Replaced equipment or materials must be disposed of in accordance with local, state, or federal codes and regulations and cannot be re-installed elsewhere.
- Cool Roof projects will be capped at \$5,000 per project.
- Window Film projects will be capped at \$1,000 per project.
- Rebates will be capped at \$100,000 per customer per program year.

Pre-qualification of eligible Business Energy Upgrades measures is not required **except** for retrofit lighting equipment and occupancy sensors. Specific eligibility and submittal requirements for **Cool Roof and Window Film** measures are outlined below in this Equipment Catalog.

Rebates for additional efficiency measures may be available. For more information about rebates, eligibility requirements, rebate levels, other JEA energy efficiency programs, or general inquiries, visit [jea.com/investsmart](http://jea.com/investsmart), email [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com), or contact Customer Service Center 888-345-4609.

## 1.1 Cool Roof

### Measure Description:

Dark colored roofing absorbs considerable heat from the sun in the summer. A reflective “cool roof” can greatly reduce this undesirable solar heating of the building. Installing an ENERGY STAR® reflective cool roof reduces hot weather cooling needs which saves air conditioning energy costs and can improve comfort.

### Eligibility:

The eligibility criteria for the cool roof measure are:

- The roofing must be installed over occupied spaces with mechanical cooling.
- The roofing must comply with ENERGY STAR® reflective roof products requirements. Specific products eligible for the rebate are listed in the “Products > Roof Products” section of the EPA ENERGY STAR® website ([www.energystar.gov](http://www.energystar.gov)).

### Exclusions:

- New construction is NOT eligible for this rebate.
- Facilities with no mechanical cooling are NOT eligible.
- The roofing area must not be permanently shaded

### Items to submit with Rebate Application:

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer’s specification sheets demonstrating compliance with rebate eligibility requirements.

### Instructions for Rebate Application:

In the Rebate Application, fill in the following:

- “Efficiency” as the solar reflectance of the roof installed.
- “Measure Size” as the square footage of the roof installed.

### Measure Rebate:

The rebate amount for qualifying measures is listed below in **Table 1-1**.

**Table 1-1 Cool Roof Rebate Amounts**

Equipment Code	Measure Description	Rebate (\$ / unit)
ENCR	Cool Roof	\$0.10/sq ft.

## 1.2 Reflective Window Film

### Measure Description:

Window film can reduce solar heat gain and increase solar reflectance, reducing space cooling energy consumption.

### Eligibility:

The eligibility criteria for the reflective window film measure are:

- The installed window film must have a Solar Heat Gain Coefficient (SHGC) rate of 0.39 or less.
- Only windows with eastern, southern, or western exposure are eligible.
- The windows cannot be more than 50% shaded by external elements (such as trees, buildings, awnings etc.) during the cooling season.
- The windows must be part of or directly affect the mechanically-cooled space.

### Exclusions:

- New construction is NOT eligible for this rebate
- Facilities with no mechanical cooling are NOT eligible.

### Items to submit with Rebate Application:

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material.
- Manufacturer's specification sheets demonstrating compliance with eligibility requirements.

### Instructions for Rebate Application:

In the Rebate Application, fill in the following:

- "Efficiency" as the SHGC rating of the window film.
- "Measure Size" as the square footage of the glazing covered by the installed film.

### Measure Rebate:

The rebate amount for qualifying measures is listed below in **Table 1-2**.

**Table 1-2 Reflective Window Film Rebate Amounts**



Equipment Code	Measure Description	Rebate (\$ / unit)
ENWIFL	Reflective Window Film	\$0.40/sq ft.

## 2 Sample Rebate Worksheet

### SAMPLE REBATE WORKSHEET

The following is an example for 50,000 sq. ft. of cool roof added to an existing building.

Parameter	Measure 1	Measure 2	Measure 3
Equipment code	ENCR	Please refer to Tables 1-1 or 1-2 above for the appropriate code.	
Project type (Retrofit or New Construction)	Retrofit		
Installation date	1/15/2013		
Equipment location (e.g. roof, mechanical room)	Roof		
Equipment end use (e.g. supply fan, CHW pump)	Cool Roof		
Age of replaced equipment (for retrofits)	30		
Dealer name	Acme		
Manufacturer	Acme		
Model number	X14G234789356		
Serial Number (if no serial number, use NA)	NA		
Annual operating hours	4,380		
Efficiency(ies) (as described in Equipment Catalog)	.65		
Measure size (as described in Equipment Catalog)	50000	Should be measured in sq. ft.	
Measure rebate (\$) (e.g. HVAC: \$50/ton x 10 tons = \$500)	$\$0.10 * 50000 = \$5,000$		
Number of measures	1	Per sq. ft. as described in Section 1 above.	
Total rebate (\$) (# of Measures * Measure Rebate)	\$5000		

**\*\*Be sure to include a copy of the invoice indicating the total project cost (differentiating the labor and material)\*\***

#### To locate equipment catalog:

- www.jea.com/InvestSmart
- Select Cool Roof and Window Film equipment catalog
- Select Cool Roof and Window Film Rebate Details and Eligibility

## Appendix J - Refrigeration Solutions Equipment Catalog

2018



# **InvestSmart Business Energy Upgrades Refrigeration Solutions Equipment Catalog**

*01/01/2018*

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# 1 Refrigeration Solutions

This Equipment Catalog describes the eligibility requirements and rebate amounts for qualifying **Refrigeration** equipment under the InvestSmart Business Energy Upgrades. It also includes instructions on how to complete the Rebate Application and information regarding any required additional documentation. JEA provides rebates for many types of energy efficient technologies. Please read the following sections carefully to ensure that you purchase and install qualifying equipment.

In order to be eligible for rebates through InvestSmart, all equipment must meet the following requirements:

- Equipment must be new and installed in a manner that meets or exceeds code regulations and adheres to industry standards.
- Equipment may be installed in either retrofit or new construction/major renovation applications, except where indicated in the individual measure.
- Replaced equipment must be disposed of in accordance with local, state, or federal codes and regulations and cannot be re-installed elsewhere.
- Rebates will be capped at 50% net customer cost (with the exception of gaskets and door closers which are capped at 90% net customer cost) Rebates will be capped at \$100,000 per customer per program year.

Pre-qualification of Business Energy Upgrades eligible measures is not required **except** for retrofit lighting equipment and occupancy sensors. Additional eligibility and submittal requirements for **Refrigeration** measures are outlined in this Equipment Catalog.

Rebates for additional measures may be available. For more information about rebates, eligibility requirements, rebate levels, other JEA energy efficiency programs, or general inquiries, visit [jea.com/investsmart](http://jea.com/investsmart), email [jeaefficiencyrebates@nexant.com](mailto:jeaefficiencyrebates@nexant.com), or contact Customer Service Center 888-345-4609.

## 1.1 Anti-Sweat Heater Controls

### Measure Description:

When a refrigerator operates at a temperature below the dew point temperature of the surrounding air, condensation will form on the outside of the case. Anti-sweat heaters (ASH) prevent condensation from forming on display cases by heating the display case frame. This is necessary to allow customers to see inside cases and prevent excess moisture build-up. Anti-sweat heaters are generally set to run all the time, regardless of the relative humidity and dew point of the surrounding air. In addition to causing a significant electrical draw, the heat from the anti-sweat devices causes an increased refrigeration load. ASH controls are devices that sense the relative humidity in the air or condensation on the refrigerator's glass and turn the heater on only when it is needed.



**Eligibility:**

The eligibility criteria for the anti-sweat heater controls measure are:

- The ASH controller must sense humidity or condensation and cycle the heater accordingly.

**Exclusions:**

- Rebates are not available when installed in conjunction with the “High Efficiency Doors for Low Temperature Display Cases” measure.

**Items to submit with Rebate Application:**

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer’s specification sheets demonstrating compliance with equipment eligibility requirements.

**Instructions for Rebate Application:**

In the Rebate Application, fill in the following:

- “Efficiency” as “NA”
- “Measure Size” as the total linear feet of enclosed case

**Measure Rebate:**

Rebate amounts for qualifying measures are listed below in **Table 1-1**.

**Table 1-1 Anti-Sweat Heater Controls Rebate Amounts**

Equipment Code	Measure Description	Rebate (\$ /linear ft of case)
RFASHL	Anti-Sweat Heater Controls Low Temperature Applications ( $\leq 0^{\circ}\text{F}$ )	\$15/linear ft
RFASHM	Anti-Sweat Heater Controls Medium Temperature Applications ( $> 0^{\circ}\text{F}$ )	\$15/linear ft

## 1.2 Door Gaskets for Glass and Solid Doors

**Measure Description:**

Gaskets provide a seal around the cooler or freezer door to prevent outside air from entering the cooler when the door is closed. Old or damaged door gaskets can lead to outside air leaks, resulting in higher refrigeration loads and excess frost build up on the evaporator. Replacing the damaged gasket can achieve a stronger seal and help reduce refrigeration load.

**Eligibility:**

The eligibility criteria for the door gasket measure are:

- Only retrofit projects are eligible.
- Must replace a worn gasket on a reach-in or walk-in door serving a cooler or freezer.
- Replacement gaskets must meet or exceed the manufacturer's specifications including dimensions, materials, attachment method, style, compression, and magnetism.

**Items to submit with Rebate Application:**

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer's specification sheets demonstrating compliance with equipment eligibility requirements.

**Instructions for Rebate Application:**

In the Rebate Application, fill in the following:

- "Efficiency" as "NA"
- "Measure Size" as the door perimeter in linear feet

**Measure Rebate:**

Rebate amounts for qualifying measures are listed below in **Table 1-2**.

**Table 1-2 Door Gasket for Glass and Solid Doors Rebate Amounts**

Equipment Code	Measure Description	Rebate (\$ / Unit)
RFDGGL	Door Gaskets for Glass Doors Low Temperature Application ( $\leq 0^{\circ}\text{F}$ )	\$5/linear ft
RFDGGM	Door Gaskets for Glass Doors Medium Temperature Application ( $> 0^{\circ}\text{F}$ )	\$5/linear ft
RFDGSL	Door Gaskets for Solid Doors Low Temperature Application ( $\leq 0^{\circ}\text{F}$ )	\$5/linear ft
RFDGSM	Door Gaskets for Solid Doors Medium Temperature Application ( $> 0^{\circ}\text{F}$ )	\$5/linear ft

### 1.3 High-Efficiency Doors for Low Temperature Display Cases

**Measure Description:**

High-efficiency doors generally include double or triple paned glass that helps prevent conductive heat loss from the display case. These doors also minimize the need for anti-sweat heat.



**Equipment Eligibility:**

The eligibility criteria for the high efficiency display case door measure are:

- Only retrofit projects are eligible.
- Only available for low temperature applications ( $\leq 0^{\circ}\text{F}$ ).
- Must be a low/no anti-sweat door with total heater amperage less than 0.90 amps per door at 120 volts.

**Exclusions:**

- This rebate is not available in conjunction with the “Anti-Sweat Heater Controls” measure.

**Items to submit with Rebate Application:**

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer’s specification sheets demonstrating compliance with equipment eligibility requirements.

**Instructions for Rebate Application:**

In the Rebate Application, fill in the following:

- “Efficiency” and “Measure Size” as “NA”

**Measure Rebate:**

The rebate amount for qualifying measures is listed below in **Table 1-3**.

**Table 1-3 High-Efficiency Doors for Low-Temperature Display Cases Rebate Amounts**

Equipment Code	Measure Description	Rebate (\$ / Unit)
RFHEDL	High-efficiency Doors for Display Case Low Temperature Applications ( $\leq 0^{\circ}\text{F}$ )	\$75/door

## 1.4 Night Covers for Open Vertical and Horizontal Display Cases

**Measure Description:**

Refrigerated display cases in food stores are often left open to allow customers to easily see and access the contents of the case. This causes the refrigerator compressors to work longer to compensate for the warming caused by the infiltration of store air. Night covers are blinds that can be used to cover the open display case during the night time when it is not necessary for the contents of the case to be visible.

**Applicability:**

Both new construction and retrofit installations are eligible.

**Equipment Eligibility:**

The eligibility criteria for the night cover measure are:

- Night covers must be in use for at least 6 hours nightly.
- Customer should consider resetting to higher suction temperatures when covers are applied.
- Case manufacturer must not object to this measure.

**Items to Submit with Rebate Application:**

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer's specification sheets demonstrating compliance with equipment eligibility requirements

**Instructions for Rebate Application:**

In the Rebate Application, fill in the following:

- "Efficiency" as "NA"
- "Measure Size" as the length of the installed cover in feet

**Measure Rebate:**

Rebate amounts for qualifying measures are listed below in **Table 1-4**.

**Table 1-4 Night Cover for Open Vertical and Horizontal Display Cases Rebate Amounts**

Equipment Code	Measure Description	Rebate (\$ / Unit)
RFVONC	Night Covers for Vertical Open Display Cases	\$3.50/linear ft
RFHONC	Night Covers for Horizontal Open Display Cases	\$3.50/linear ft

## 1.5 Strip Curtains for Walk-In Coolers and Refrigerated Warehouse Spaces

**Measure Description:**

Strip curtains or plastic swinging doors are flexible (typically clear plastic) barriers that cover the door to a walk-in cooler or refrigerated warehouse. They are used to allow spaces to be easily accessed with equipment or products, while reducing the infiltration of warm outside air. Strip curtains generally



replace direct openings to unrefrigerated spaces, or worn or torn curtains older than 5 years.

**Equipment Eligibility:**

The eligibility criteria for the strip curtain measure are:

- Only retrofit projects are eligible.
- Install strip curtains or plastic swinging doors on doorways of walk-in coolers or freezers, or doorways to refrigerated warehouses.

**Exclusions:**

- Strip curtains or plastic doors replacing existing curtains purchased within the past 5 years are not eligible.

**Items to submit with Rebate Application:**

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)

**Instructions for Rebate Application:**

In the Rebate Application, fill in the following:

- “Efficiency” as “NA”
- “Measure Size” as the square footage of the affected doorway

**Measure Rebate:**

The rebate amount for qualifying measures is listed below in **Table 1-5**.

**Table 1-5 Strip Curtains for Walk-In Coolers and Refrigerated Warehouse Spaces Rebate Amounts**

Equipment Code	Measure Description	Rebate (\$ / Unit)
RF SCTN	Strip Curtains for Walk-in & Refrigerated Warehouse Spaces	\$2.50/square ft

## 1.6 Auto Closers for Walk-In and Reach-In Cooler and Freezer Doors

### Measure Description:

An auto closer is a device that automatically closes a cooler or freezer door. This may be applied to the main insulated door of a walk-in unit or the door of a reach-in display case. It prevents excess heat from entering the cooler, thereby reducing the load on the compressor. Auto closers typically close a door completely, even if left open as little as one inch.

### Applicability:

New construction and retrofit installations are eligible.

### Eligibility:

The eligibility criteria for the door auto-closer measure are:

- Auto closer for main insulated doors of walk-in coolers or freezers must firmly close door when door is within 1" of full closure.
- Auto closer for reach-in refrigerator doors must be applied to a door with a minimum perimeter of 16' and must firmly close door when door is within 1" of full closure.

### Items to submit with rebate Application:

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer's specification sheets demonstrating compliance with equipment eligibility requirements.

### Instructions for Rebate Application:

In the Rebate Application, fill in the following:

- "Efficiency" and "Measure Size" as "NA"

### Measure Rebate:

Rebate amounts for qualifying measures are listed below in **Table 1-6**.

**Table 1-6 Auto Closers for Walk-In and Reach-In Cooler and Freezer Doors Rebate Amounts**

Equipment Code	Measure Description	Rebate (\$ / Unit)
RFWACL	Auto Closer Main Walk-in Unit Doors Low Temperature Application ( $\leq 0^{\circ}\text{F}$ )	\$100/closer
RFWACM	Auto Closer Main Walk-in Unit Doors Medium Temperature Application ( $> 0^{\circ}\text{F}$ )	\$100/closer
RFRACL	Auto Closer Reach-In Doors Low Temperature Application ( $\leq 0^{\circ}\text{F}$ )	\$100/closer



RFRACM	Auto Closer Reach-In Doors Medium Temperature Application (> 0 °F)	\$100/closer
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## 1.7 Electronically Commutated Motors (ECM)

### Measure Description:

An electronically commutated motor (ECM) is a fractional horsepower direct current (DC) motor used most often in commercial refrigeration applications such as refrigeration and display cases. ECMs use less electricity than standard motors.

### Eligibility:

The eligibility criteria for the electronically commutated motors are:

- Only retrofit projects are eligible.
- All ECMs installed in existing refrigeration cases up to 1 HP in size may qualify for an incentive.

### Exclusions:

- Cannot be installed in conjunction with the “Evaporator Fan Controller for Walk-In Coolers and Display Cases” measure.

### Items to submit with Rebate Application:

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer’s equipment specification sheet.

### Instructions for Rebate Application:

In the Rebate Application, fill in the following:

- “Efficiency” and “Measure Size” as “NA”

### Measure Rebate:

The rebate amount for qualifying measures is listed below in **Table 1-7**.

**Table 1-7 Electronically Commutated Motor (ECM) Rebate Amount**

Equipment Code	Measure Description	Rebate (\$ / Unit)
ECMREF	EC Motor	\$50/motor

## 2 Sample Rebate Worksheet

### SAMPLE REBATE WORKSHEET

The following is an example for newly installed anti-sweat heater controls on (2) refrigerated doors, as well as a replacement of a cooler with (1) 20-foot, high efficiency, low-temperature, reach-in cooler.

Parameter	Measure 1	Measure 2	Measure 3
Equipment code	RFASHM		
Project type (Retrofit or New Construction)	New Construction		
Installation date	7/1/2011		
Equipment location (e.g. supply fan, CHW pump)	Retail Area		
Equipment end use (e.g. supply fan, CHW pump)	Refrigerated Cases		
Age of replaced equipment (for retrofits)	NA		
Dealer name	Acme Anti Sweat Controls		
Manufacturer	Widget ASHC, LLC		
Model number	ABC123		
Serial Number (if no serial number, use NA)	X14G234789356		
Annual operating hours	8,760		
Efficiency(ies) (as described in Equipment Catalog)	NA		
Measure size (as described in Equipment Catalog)	16		
Measure rebate (\$) (e.g. HVAC: \$50/ton x 10 tons = \$500)	\$240		
Number of measures	2		
Total rebate (\$) (# of Measures x Measure Rebate)	\$480		

Indicate if it is a new construction or a retrofit

**\*\*Be sure to include a copy of the invoice indicating the total project cost (differentiating the labor and material)\*\***

#### To locate equipment catalog:

- [www.jea.com/InvestSmart](http://www.jea.com/InvestSmart)
- Select Refrigeration Solutions
- Select Refrigeration Rebate Details and Eligibility



## Appendix K - Water Heating Equipment Catalog

2018



# **InvestSmart Business Energy Upgrades Water Heating Equipment Catalog**

*01/01/2018*



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# 1 Water Heating

This Equipment Catalog describes the eligibility requirements and rebate amounts for qualifying Water Heating Equipment under the InvestSmart Business Energy Upgrades. It also includes instructions on how to complete the Rebate Application and information regarding any required additional documentation. JEA provides rebates for many types of energy efficient technologies. Please read the following sections carefully to ensure that you purchase and install qualifying equipment.

In order to be eligible for rebates through InvestSmart, all equipment must meet the following requirements:

- Equipment must be new and installed in a manner that meets or exceeds code regulations and adheres to industry standards.
- Equipment may be installed in either retrofit or new construction/major renovation applications, except where indicated in individual measures.
- Replaced equipment must be disposed of in accordance with local, state, or federal codes and regulations and cannot be re-installed elsewhere.
- Rebates will be capped at 50% net customer cost and a possible rebate buy-down to a simple payback of no less than 1.0 year. Rebates will be capped at \$100,000 per customer per program year.

Pre-qualification of Business Energy Upgrades eligible measures is not required **except** for retrofit lighting equipment and occupancy sensors. Additional eligibility and submittal requirements for **Water Heating Equipment** measures are outlined in this Equipment Catalog.

Rebates for additional measures may be available. For more information about rebates, eligibility requirements, rebate levels, other JEA energy efficiency programs, or general inquiries, visit [jea.com/investsmart](http://jea.com/investsmart), email [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com), or contact Customer Service Center 888-345-4609.

## 1.1 Heat Pump Water Heater

### Measure Description:

A qualifying Heat Pump Water Heater is a newer technology that is 50% more efficient than a standard electric water heater by reclaiming energy from the air, water, and ground to directly heat water.

### Applicability:

Best for businesses that require a large flow of heated water and continuous air cooling and/or dehumidification, such as hotels, hospitals, and certain manufacturing facilities.



**Eligibility:**

The eligibility criteria for the heat pump water heater are:

- Must have a minimum Coefficient of Performance (COP) of 3.0, based on 120 degree (or greater) leaving water temperature.
- Must be installed with a pre-heat tank or special tank controls, in order to minimize back-up strip element use and to maximize efficiency.
- Must be compliant with all local, state and national codes regarding the installation and operation of water heating equipment.

**Items to submit with Rebate Application:**

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer's specification sheets demonstrating compliance with eligibility requirements.

**Instructions for Rebate Application:**

In the Rebate Application, fill in the following:

- "Efficiency" as the unit's COP rating (3.0 or better to qualify).
- "Measure Size" as the rated cooling ton(s) of the installed unit.

**Measure Rebate:**

The rebate amount for qualifying measures is listed in **Table 1-1**.

Equipment Code	Measure Description	Rebate (\$ / Unit)
HWHPWH	Heat Pump Water Heater	\$60/ton

**Table 1-1 Heat Pump Water Heater Rebate Amount**

## 1.2 High-Efficiency Electric Storage Water Heaters

**Measure Description:**

High-efficiency electric storage water heaters can offer a 10-20% energy savings compared to heaters with lower Energy Factors (EF).

**Eligibility:**

The eligibility criteria for the high-efficiency electric storage water heater are:

- Must replace an existing electric water heater.



- Must have an EF of 0.91 or greater, and be a residential-style electric storage water heater. Go to [www.ahridirectory.org](http://www.ahridirectory.org) for a list of qualifying water heaters and the corresponding EF.
- Must be 40 gallons or more.
- Must be compliant with all local, state and national codes regarding the installation and operation of water heating equipment.

**Exclusions:**

- New construction is NOT eligible for this rebate.

**Items to Submit with Rebate Application:**

- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)
- Manufacturer's specification sheets demonstrating compliance with eligibility requirements.

**Instructions for Rebate Application:**

On the Rebate Application, fill in the following:

- "Efficiency" as the EF value listed for efficiency.
- "Measure Size" as the gallon(s) of the unit installed.

**Measure Rebate:**

The rebate amount for qualifying measures is listed in **Table 1-2**.

Equipment Code	Measure Description	Rebate (\$ / Unit)
HWESWH	High-Efficiency Electric Storage Water Heater	\$30/heater

**Table 1-2 High Efficiency Electric Storage Water Heater Rebate Amount**

## 2 Sample Rebate Worksheet

### SAMPLE REBATE WORKSHEET

The following is an example for a newly installed 40 gallon electric storage water heater

Parameter	Measure 1	Measure 2	Measure 3
Equipment code	HWESWH		
Project type (Retrofit or New Construction)	Retrofit		
Installation date	1/15/2013		
Equipment location (e.g. roof, mechanical room)	Mechanical Room		
Equipment end use (e.g. supply fan, CHW pump)	Water Heating		
Age of replaced equipment (for retrofits)	NA		
Dealer name	Acme		
Manufacturer	Widget, LLC		
Model number	ABC123		
Serial Number (if no serial number, use NA)	X14G234789356		
Annual operating hours	8,760		
Efficiency(ies) (as described in Equipment Catalog)	.91		
Measure size (as described in Equipment Catalog)	40		
Measure rebate (\$) (e.g. HVAC: \$50/ton*10 tons=\$500)	\$30		
Number of measures	1		
Total rebate (\$) (# of Measures*Measure Rebate)	\$30		

**\*\*Be sure to include a copy of the invoice indicating the total project cost (differentiating the labor and material)\*\***

#### To locate equipment catalog:

- www.jea.com/InvestSmart
- Select Water Heating
- Select Water Heating Rebate Details and Eligibility



## Appendix L - Custom Equipment Catalog

2018



# **InvestSmart Business Energy Upgrades Custom Equipment Catalog**

*01/01/2018*

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## 1 Custom Measures

This Equipment Catalog describes the eligibility requirements and rebate amounts for qualifying Custom measures under InvestSmart Business Energy Upgrades. It also includes instructions on how to complete the Rebate Application and information regarding any required additional documentation. InvestSmart provides rebates for many types of energy efficient technologies. Please read the following sections carefully to ensure that you purchase and install qualifying equipment.

In order to be eligible for rebates through Business Energy Upgrades, all equipment must meet the following requirements:

- Equipment must be new and installed in a manner that meets or exceeds code regulations and adheres to industry standards.
- Equipment may be installed in either retrofit or new construction/major renovation applications, except where indicated in individual measures.
- Replaced equipment must be disposed of in accordance with local, state, or federal codes and regulations and cannot be re-installed elsewhere.
- Rebates will be capped at 50% net customer cost and a possible rebate buy-down to a simple payback of no less than 3.0 years. Rebates will be capped at \$100,000 per customer per program year.

Pre-qualification of eligible measures under Business Energy Upgrades is required for all Custom projects. Additional eligibility and submittal requirements for **Custom** technologies are outlined in this Equipment Catalog.

Rebates for additional measures may be available. For more information about rebates, eligibility requirements, rebate levels, other JEA energy efficiency programs, or general inquiries, visit the InvestSmart website at [jea.com/investsmart](http://jea.com/investsmart), email [jeaeficiencyrebates@nexant.com](mailto:jeaeficiencyrebates@nexant.com), or contact the Customer Service Center at (888) 345-4609.

### 1.1 Custom Measures

#### Measure Description:

Custom measures are projects that apply to many end-uses to increase energy efficiency and reduce annual electrical use. The program does not explicitly specify eligible measures to provide program participants maximum flexibility in identifying potential projects. Participants may propose the inclusion of any measure that:

- Involves a capital expenditure for project(s) that have an energy savings component;
- Produces a verifiable reduction in annual electric energy consumption without creating an increase in summer peak demand usage
- Is installed in either a retrofit or new construction application
- Is cost-effective as determined by JEA's internal cost-benefit test(s)

**Qualifying Measure Examples:**

Examples of eligible measures are listed below. Program participants are free to propose measures not included below, so long as the above requirements are met.

- HVAC upgrades (e.g. constant volume systems upgraded to variable air volume system)
- VFDs larger than 200 HP
- VFDs installed on chillers, pumps, air compressors, or non-HVAC equipment
- Increased compressed air system efficiencies (e.g. installation of VFD's, added storage)
- Control applications (e.g. installation of a building energy management control system)
- Process improvements
- Induction lighting
- Heat Recovery Units

JEA will review all measures for their eligibility and appropriateness to participate in Custom Business Energy Upgrades. JEA retains the right to determine, at their sole discretion, eligible measures and reject applications or request additional information as necessary.

**Exclusions:**

The following measures are excluded from consideration for Custom rebates:

- Any projects that are eligible under the Lighting or Standard Programs
- Retro-commissioning measures
- Projects without a capital purchase of new equipment
- Projects that receive a rebate through any other energy efficiency program offered by JEA
- Rely solely on changes in customer behavior
- Merely terminate existing processes, facilities, operations, or vacancies
- Relocate existing processes, facilities, or operations out of JEA's service territory
- Are required by local, state, or federal law; building or other codes, or are standard industry practice
- Produce an electric energy reduction through substitution of another energy source for electricity
- Generate electricity, including cogeneration or renewable energy generation
- Energy Conservation Measures that apply duty cycling technology in air conditioning or heating units
- Energy Conservation Measures are subject to provide 3<sup>rd</sup> party lab results according to JEA's discretion to qualify for a rebate
- Projects that have a projected pay-back of less than three years.

**Items to submit with Custom Application:**

- Energy savings calculations and explanations of the savings methodologies
- Lighting workbook not required for Induction lighting projects

**Items to submit with Custom Installation Notice:**

- Revised energy savings calculations and explanations of the changes to the original submittal (if applicable)
- Dated sales receipt or detailed invoice indicating the total project cost, differentiating the labor and material. (Please note: JEA reserves the right to cancel any project that has not submitted all required supporting documentation within 90 days of the receipt of the initial application.)

**Measure Rebate:**

The rebate amount for qualifying measures is listed in **Table 1-1**. The rebate may be capped at 50% of incremental cost, or a possible rebate buy down to no less than 3.0 year payback, whichever is less. Projects must also pass JEA's cost effectiveness tests.

Measure Description	Rebate (\$/unit)
Eligible Custom measures	\$0.05 / kWh

**Table 1-1: Rebate Amount for eligible Custom Measures**

## 2 Sample Rebate Worksheet

The following is an example for a VFD air compressor.

Parameter	Measure 1	Measure 2	Measure 3
Project type (Retrofit or New Construction)	Retrofit		
Estimated installation date	2/1/13		
Dealer/contractor name	ACME		
Energy efficiency measure (type and description)	Replace an existing 20HP air compressor with a new 20 HP VFD compressor.		
Estimated baseline usage (kWh/yr)	250,000		
Estimated post-retrofit usage (kWh/yr)	200,000		
Estimated savings (kWh/yr)	50,000		
Estimated annual operating hours	8760		
Estimated Project Incremental costs (\$)	\$10,000		
Estimated rebate (\$)	\$2,500		

The annual operation hours of the equipment being replaced

The cost related to this project: equipment, labor, installation

\$0.05 x Estimated Savings  
Or  
50% of Incremental cost  
whichever is lesser

**\*\*Be sure to include a copy of the invoice indicating the total project cost (differentiating the labor and material)\*\***

### To locate equipment catalog:

- [www.jea.com/InvestSmart](http://www.jea.com/InvestSmart)
- Select Custom Business Energy Upgrades
- Select Custom Equipment Catalog

## Appendix M - Glossary of Acronyms, Units, and Definitions

**ACCA:** Air Conditioning Contractors of America

**AHRI:** Air-Conditioning, Heating, and Refrigeration Institute

**ANSI:** American National Standards Institute

**ARI:** Air-Conditioning and Refrigeration Institute, which has become AHRI. ARI standards have been renamed as AHRI standards and compliance with AHRI standards is inclusive of ARI standards.

**ASHRAE:** American Society of Heating, Refrigerating, and Air-Conditioning Engineers

**Btu/h (British thermal units per hour):** energy that is produced or rejected from a system.

**CEE:** Consortium for Energy Efficiency

**CFM (cubic feet per minute):** measurement of airflow.

**COP (coefficient of performance):** the ratio of heating or cooling to energy consumption, in consistent units.

**CRI (color rendering index):** a measure of a lamp's ability to render colors accurately.

**EA (Energy Analyst):** an energy modeler with a qualified PE, CEM, BEMP certification or equivalent with experience in whole building energy modeling to provide services to the New Construction Program

**ECM (electronically commutated motor):** ultra high-efficiency programmable brushless DC motor.

**EER (energy efficiency ratio):** the ratio of net cooling capacity in Btu/hour to total rate of electric input in watts.

**Glazing:** the glass portion of a window

**HID (high intensity discharge):** a general group of lamps consisting of mercury, metal halide, high pressure sodium, and low pressure sodium lamps.

**hp (horsepower):** unit of power equal to 746 watts.

**HSPF (heating seasonal performance factor):** a single number figure of merit expressing the seasonal heating efficiency of heat pumps, in Btu/watt-hour. The term is generally applied to heat pump systems less than 65,000 Btu/hour.

**HVAC:** heating, ventilation, and air-conditioning

**IECC:** International Energy Conservation Code

**IEER (integrated energy efficiency ratio):** a single number figure of merit expressing cooling part-load EER efficiency for commercial unitary air-conditioning and heat pump equipment on the basis of weighted operation at various load capacities for the equipment. As of 1/1/10, IEER superseded IPLV for unitary HVAC equipment greater than or equal to 65,000 Btu/hour in ASHRAE standard 90.1-2007.

**IPLV (integrated part load value):** a single-number figure of merit based on part-load EER, COP, or kW/ton expressing part-load efficiency for air-conditioning and heat pump equipment on the basis of weighted operation at various load capacities for the equipment.

**IECC:** International Energy Conservation Code



**Lbs:** pounds

**LED:** light-emitting diode

**LEED (Leadership in Energy and Environmental Design):** an internationally recognized green building certification system developed by the U.S. Green Building Council (USGBC).

**PTAC:** packaged terminal air-conditioner

**PTHP:** packaged terminal heat pump

**R-value:** a measure of thermal resistance used in the building and construction industry.

**SEER (seasonal energy efficiency ratio):** the total cooling output of an air conditioner or heat pump during its normal annual usage period for cooling, in Btu, divided by the total electric energy input during the same period, in watt hours.

**SF:** square foot

**SHGC (Solar Heat Gain Coefficient):** a measurement of the amount of solar radiation through a piece of glass or door material.

**T12, T8, T5:** types of fluorescent lamps.

**UL:** Underwriters Laboratories Inc.

**VAV (variable air volume):** a technique for controlling the capacity of a heating, ventilating, and/or air-conditioning (HVAC) system.

**VFD (variable frequency drive):** a system for controlling the rotational speed of an alternating current electric motor by controlling the frequency of the electrical power supplied to the motor.