



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 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.

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/investsmartterms.
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. Complete a Form W9 (required). The latest version can be obtained from the IRS website (www.irs.gov/forms-pubs/about-form-w-9).
6. 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.
7. Submit the completed application forms and required documentation including dated sales receipt or invoices by email to jeaeficiencyrebates@nexant.com.

For more information contact us at:

InvestSmart Business Energy Upgrades
4651 Salisbury Road, Suite 410
Jacksonville, FL 32258

Online: jea.com/investsmart | Phone: (888) 345-4609 | Email: 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)
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



**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> <b>(# of Measures x Measure Rebate)</b>	\$	\$	\$

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/Business\\_Resources/Rebates\\_for\\_Businesses](http://jea.com/Business_Resources/Rebates_for_Businesses), 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.

**Prescriptive Program Agreement, continued**

**Terms and Conditions:** This Program Agreement incorporates by reference the JEA General Terms and Conditions (“General Terms and Conditions”) located at [jea.com/investsmartterms](http://jea.com/investsmartterms). 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.

**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