

Savings Central Trade Ally Online Rebate Form Training Manual

Navigating the Site

URL: <http://chtradeallyonline.programprocessing.com/>



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At the top of the page you will see a series of links:

- **Program Home** – Returns you to the home page.
- **Apply Now** – The online application form. If you have not logged in, you will be automatically redirected to the login page before you can start a new application.
- **Customer Login** – Log in to the site using your username and password. If you do not have a username and password, you can also create a username from this page as well.
- **Contact Us** – This page contains a form to fill out to contact the program administrator.

Home Page



Energy Efficiency Savings from Central Hudson Gas & Electric

[Program Home](#)

[Apply Now](#)

[Customer Login](#)

[Contact Us](#)

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The home page provides information on what documentation you will need to complete your rebate as well as links to the AHRI database and our Online Rebate Training Manual.

Customer Login



Energy Efficiency Savings from Central Hudson Gas & Electric



Returning User? Please Log In:

Email Address: *

Password: *

Forgot your password? Click [HERE](#) to retrieve it

New User? Please Create An Account:

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The **Customer Login** link will bring you to the above page. If you have already signed up, you can log in using your Email Address and Password. If you forgot your password you can choose to have a temporary password emailed to you so you can log in. Successfully logging in with your existing username and password will bring you back to your unique **Program Application Center**. We will provide an overview of this section later on in manual.

If you are a new user to the Online Rebate site, please click **Create Account** under the New User heading.

Creating a New Account



Energy Efficiency Savings from Central Hudson Gas & Electric



CREATE USER ACCOUNT	
First Name:	<input type="text"/> *
Last Name:	<input type="text"/> *
eMail Address:	<input type="text"/> *
Utility Account Number:	<input type="text"/> *
Password:	<input type="password"/>
Repeat Password:	<input type="password"/>

Submit

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To create a new account, please fill in all of the information in the form.

Important Note: In the Utility Account Number field, please enter your company's main telephone number.

Once you have submitted your information you will be automatically redirected to your personalized **Program Application Center**. This section does not have any information until applications have been submitted so we will review how to submit an application before we discuss the application center in detail.

***Remember to store your username and password for later use.**

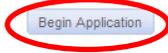
Apply Now



Energy Efficiency Savings from Central Hudson Gas & Electric



Are you ready to begin your application?



To begin a new application click the **Apply Now** link and then click on **Begin Application**.

Your Home/Business Information
Where Is The Work Being Completed?

**PLEASE FILL THIS SECTION
OUT WITH THE CONTACT
INFORMATION FOR THE
REBATE APPLICANT**

First Name: * FIRST & LAST OR COMPANY

Last Name: * FIRST & LAST OR COMPANY

Company: * FIRST & LAST OR COMPANY

Acct # *

Address: *

City: *

State: ▼ *

Zip: *

Phone: *

eMail:

Save contact for later use? Yes, save this as a new contact in my profile contact list

Step 1: Fill out the contact information for the **Rebate Applicant**.

Your Contact Information

Who is the person we should contact regarding this application?

PLEASE FILL THIS SECTION
OUT WITH THE CONTACT
INFORMATION FOR THE
REBATE APPLICANT

Same as Home/Business Information:

First Name: * FIRST & LAST OR COMPANY

Last Name: * FIRST & LAST OR COMPANY

Company: * FIRST & LAST OR COMPANY

Acct # *

Address: *

City: *

State: *

Zip: *

Phone: *

eMail:

Save contact for later use? Yes, save this as a new contact in my profile contact list

Fill out the contact information for the **Rebate Applicant**. If this person is the same as the rebate applicant, click "Same as Home/Business information" to automatically fill this section in with the information from the rebate applicant above.

Contractor Information

Who is installing or completing the work/installation?

Select Contractor From Pick List: *

-- Select Contact To Assign --

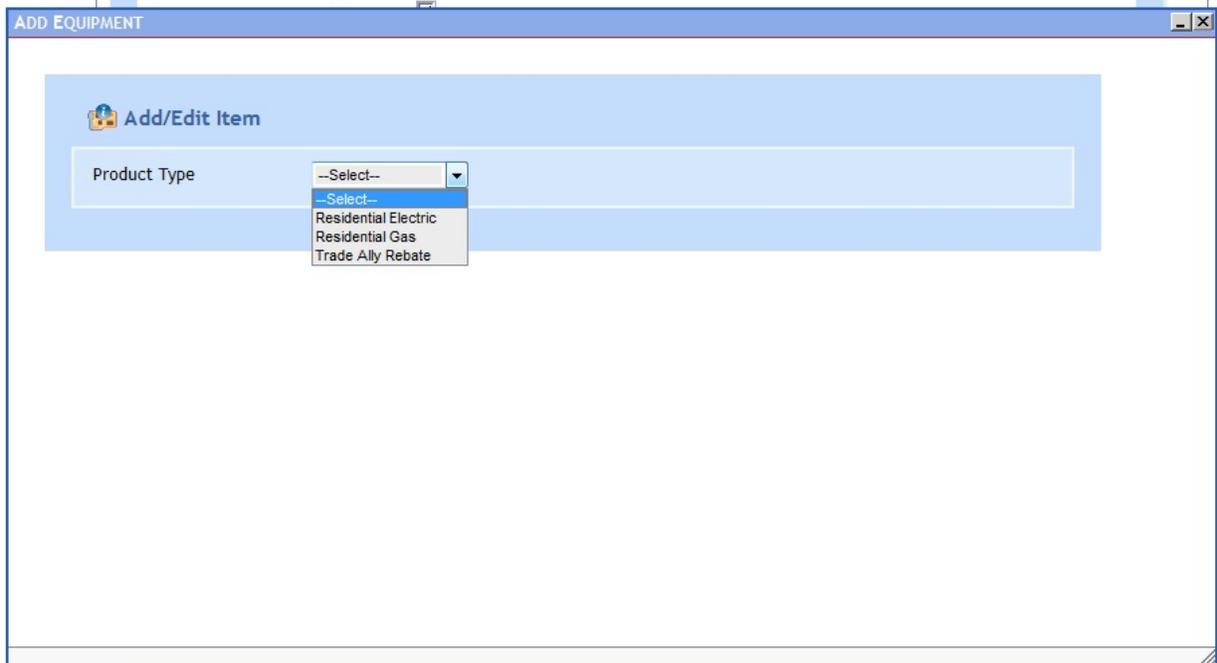
Finally, select your company from the Trade Ally drop down box. If you're company does not appear on the drop down list, please contact Frank Nitti at Frank.Nitti@icfi.com.

Central Hudson

Applicant's Name (if different than account holder)	<input type="text"/>
Date Installed (mm/dd/yyyy) *	<input type="text" value="11/21/2012"/>
Additional Information Required for Rebate Application:	<input checked="" type="checkbox"/> Dated sales receipt from SavingsCentral Trade Ally <input checked="" type="checkbox"/> Manufacturer's specification sheet, including model numbers and performance ratings
Existing Heating Fuel Type *	<input type="text" value="Gas"/>
Heating System Type *	<input type="text" value="Furnace"/>
Location of Air Handler (only required if applying for duct sealing rebate)	<input type="text" value="-Select-"/>
Does the customer have Central AC? *	<input type="text" value="Yes"/>
How did the customer hear about this program? *	<input type="text" value="Contractor"/>
If source other, please specify:	<input type="text"/>
If customer heard about this program from Central Hudson Employee, please provide name:	<input type="text"/>
What type of residence does the customer live in? *	<input type="text" value="Single Family Detached"/>
Was a Manual J performed?	<input type="text" value="-Select-"/>

Step 2: Fill out the Application Information. The questions with red asterisks are the only fields that are mandatory.

Please note: We require a dated sales receipt and an AHRI Certificate (or manufacturer spec sheet in the event an AHRI certificate cannot be provided). Please check off the boxes for "Additional Information Required for Rebate Application" if you are able to provide that documentation when submitting the application. Not submitting this required paperwork may delay the processing of your customer's rebates until the documentation can be obtained by our processing team.



Step 3: Click on the Add: New Equipment button to open up the **Add Equipment** window.

Please choose the category that your product falls under; **Residential Electric**, **Residential Gas**, or **Trade Ally Rebate** category. Commercial Gas projects cannot be submitted online and must be mailed to the processing center address on the application.

Residential Electric equipment categories include:

- Air Source Heat Pumps
- Central A/C
- Duct and Air Sealing
- ECM¹
- Water Heater
- Controls

¹ Please note that ECM's generate electric savings and are listed under Residential Electric. To submit a gas furnace with an ECM, the gas furnace should be submitted under Residential Gas and the ECM as Residential Electric. Please see the example detailed in this guide.

Residential Gas equipment categories include:

- Boilers
- Duct and Air Sealing
- Furnace
- Controls
- Water Heater

The **Trade Ally Rebate** category is selected for a Quality Install and requires a Trade Ally Terms and Conditions sheet to be submitted.

The screenshot shows a web application window titled "ADD EQUIPMENT". At the top, there are tabs for "Additional Information Required" and "Data Date Receipt from SavingsCentral Trade Ally". The main content area is titled "Add/Edit Item" and contains a form with the following fields:

- Product Type: Residential Gas (dropdown)
- Category: Furnace (dropdown)
- Product: Gas Furnace AFUE >= 94 (dropdown)

Below these fields is an "Attributes" section with a table of input fields:

Attribute	Value
AFUE	98.0
AHRI REF NUMBER * Required	5555555
ANNUAL THERMS SAVED	
GAS UTIL CUST INCENTIVE	280
INCREMENTAL INSTALLED COST	
KBTUH * Required	116
MANUFACTURER * Required	
MEASURE LIFE	20
MODEL * Required	
NUMBER UNITS	1
QUANTITY	1
SERIAL NUMBER * Required	

At the bottom of the form is a blue "SUBMIT" button. Below the form, there is a red "Action" bar.

After you have selected your product type and category, the product box will generate which lists the rebate tier levels. When you have chosen the qualifying rebate tier level the **Attributes** box will generate below it.

In the **Attributes** box, please ONLY fill in the sections with the red asterisk as they are required. DO NOT change the auto generated fields such as Incentive or Measure Life.

As the above image shows, if you are missing information from a required field and try to submit the application, the **Attributes** box will automatically update with an error message next to the required fields that are missing.

When you are done, click the submit button. Continue this process for any remaining equipment rebates you wish apply for.

How did the customer hear about this program? * Contractor ▾

If source other, please specify:

If customer heard about this program from Central Hudson Employee, please provide name:

What type of residence does the customer live in? * Single Family Detached ▾

Was a Manual J performed? -Select- ▾

Step 3: EQUIPMENT INFORMATION

PROJECT: EQUIPMENT REFRESH

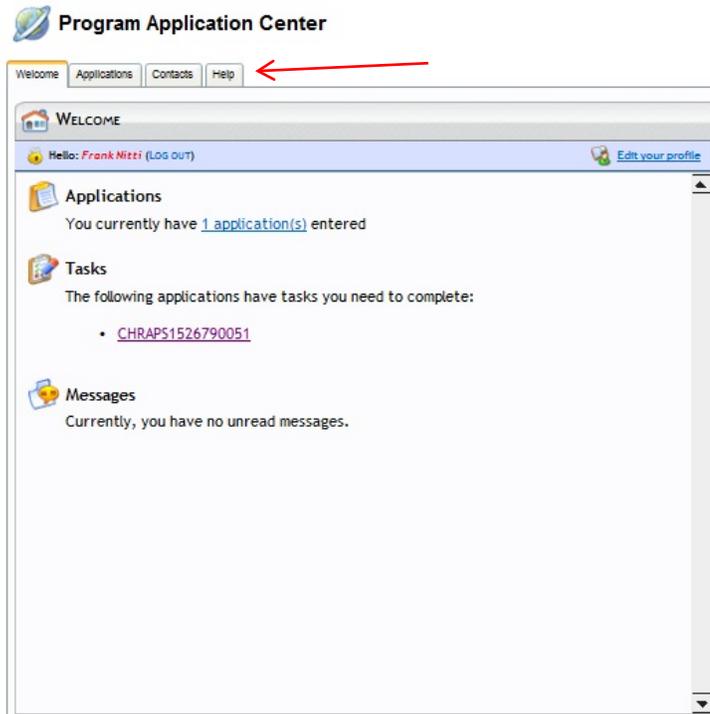
Category	Product type	Name	Quantity	Entered	Action
ECM	RESIDENTIAL ELECTRIC	ECM FURNACE FAN	1	NOV-21 2012 10:52AM	
FURNACE	RESIDENTIAL GAS	GAS FURNACE AFUE >= 94	1	NOV-21 2012 10:51AM	

PAGE 1 Viewing 1 - 2 of 2 Records



After you have finished entering all the Equipment Information, click submit.

Program Application Center



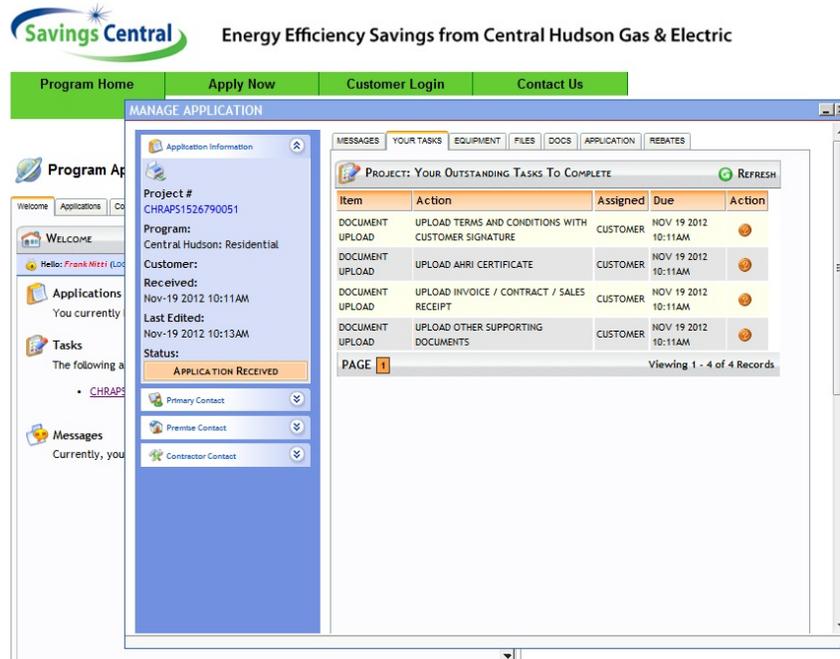
Please note that more detailed information is available under the Help tab in the Program Application Center.

The **Program Application Center** will provide you with easy accessibility to applications that you have submitted in the past, your open tasks, and messages sent to you from our processing team.

- **Applications** will list all of the applications that you have pending. Clicking on the link will automatically take you to the Applications tab above.
- **Tasks** will list projects that require additional information or files to be uploaded before we can complete the processing of your application.
- **Messages** will list any messages from the processing team on follow-up that is needed on your application before we can proceed with processing.

Clicking on the project link under **Tasks** will open up the **Manage Application** window.

Manage Application



On the left side of the window, you will see the general information on the project such as submitted date, project number, and contact information.

On the right is a box with multiple tabs. These will be reviewed below but the most important tab to pay attention to is **Your Tasks**.

Messages – Lists all of the notes and messages made on the account.

***Your Tasks** – Lists the tasks that have to be completed for the application to be moved forward in processing.

The Savings Central program requires specific documentation for each application including:

- signed copy of the customer terms and conditions
- itemized sales receipt or invoice
- AHRI certificate or manufacturer's spec sheet if no AHRI Certificate is available. AHRI certificates are available through <http://www.ahridirectory.org/ahridirectory/pages/home.aspx>. If you require assistance in searching for your equipment's certificate, please reach out to one of the Program contacts below.

IMPORTANT NOTE – Not all of the tasks listed here are required. The above documentation can be uploaded in one file if convenient. The number of file uploads cannot exceed four.

After you upload a document, click Refresh in the upper right corner, this will refresh the page, updating the task to complete.

Equipment – Lists the equipment that was submitted on the application.

Files – Lists the documents that have been uploaded for the application. These can be downloaded and reviewed.

Docs – Lists documents that were created and uploaded by the processing team.

Application – Electronic version of the application that was submitted.

Rebates – Lists the rebate amount approved for this project after review. This is created by the processing team.

Please feel free to provide feedback on your experience using the online rebate process by clicking on Contact Us and filling out the form.

For questions about using the online rebate form please contact Frank Nitti at frank.nitti@icfi.com or by phone at 617-250-4269.

Thank you very much and we welcome your feedback on how we can improve our systems to work best for you.

FOR YOUR USE

Username: _____

Password: _____