

Residential Smart \$aver Incentive Application – Health Check

Preliminary Information

Whom should we contact with questions? Customer Trade Ally Total Project Cost: \$ 500.00
 The customer has been notified that an incentive is dependent upon the successful completion of the Health Check.*

Customer Information *(All information must match the information on the electric utility bill.)*

Duke Energy Electric Account #: 123456789
 Customer Name on Duke Energy Account: John Q. Customer
 Contact Person: John or Mary Email: johnq@gmail.com
 How did you hear about this program (mailing, email, web, Trade Ally, word of mouth, etc.)? _____
 By providing my email address, I acknowledge that I'm signing up to receive email messages from Duke Energy.

| |
|---|
| Service Address Address 1: <u>123 Anywhere Street</u> Address 2: _____ City: <u>Anytown</u> State, Zip Code: <u>OH, 12345</u> Phone: (<u>654</u>) <u>456-7890</u> |
|---|

| |
|---|
| Mailing Address <input type="checkbox"/> <i>(Same as Service Address)</i> Address 1: <u>PO Box 1234</u> Address 2: _____ City: <u>Anytown</u> State, Zip Code: <u>OH, 12345</u> Alternate Phone: (____) _____ |
|---|

Trade Ally Information

Company Name: ABC HVAC Contact Person: John Q. Technician
 Mailing Address 1: 987 Main Street Telephone: (654) 123-4567
 Mailing Address 2: Suite C Fax: (987) 654-3211
 City, State, Zip: Anytown, OH 12345 Email: johnq@abchvac.com

Application Checklist

Complete all sections Agree to Terms & Conditions Include Invoice Submit within 90 days of service

Send signed application and all required documents to:
 Smart \$aver Incentive Program, P.O. Box 525, Snellville, GA 30078
Or Fax: 1.866.728.8293 **Or Email:** incentives@dukeressmartsaver.com
 Questions? Visit duke-energy.com/smartsaver or call 1-866-785-6209.

Terms and Conditions

I have read and hereby agree to the Program Requirements as stated on the Smart \$aver Trade Ally Registration Form on file with Duke Energy. I hereby certify that the information contained on this application is true and accurate to the best of my knowledge.
 John Q. Technician April 24, 2013

Trade Ally Signature

Date

*If repairs are required before the Health Check can be completed, the customer has the option to pay for these repairs or forfeit the Health Check incentive.

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| Air Conditioner / Heat Pump | Make - Outdoor Unit | Model Number - Outdoor Unit | Serial Number - Outdoor Unit | Make - Indoor Unit | Model Number - Indoor Unit | Serial Number - Indoor Unit |
|-----------------------------|---------------------|-----------------------------|------------------------------|--------------------|----------------------------|-----------------------------|
| Heatpump | Lennox | HP223113P | 5192M06149 | Lennox | H2351341A | 687L21536 |
| AC | Lennox | AP223113P | 5192M06149 | Lennox | A2351341A | 687L21536 |
| | | | | | | |

| SEER | EER | HSPF | COP | Date Serviced | Number of Tons | Approximate System Age |
|------|-----|------|-----|---------------|----------------|------------------------|
| 11 | | 7.7 | | 4/22/2013 | 3.5 | 20 Years |
| 11 | 8 | | | 4/22/2013 | 3.5 | 20 Years |
| | | | | | | |
| | | | | | | |

Home Characteristics:

Residence Type:

- Single Family Detached
 Townhome/Condo
 Multi-family (2-4 Units)
 Multi-family (5+ Units)

Year of Construction: 1980

Heated Square Footage of Home: 1800

Number of HVAC systems in home: 1

Number of stories above grade: 1

Foundation Type: Slab Crawlspace Basement

Duct Location: Attic Unconditioned Basement/Crawlspace Conditioned Basement/Closed Crawlspace

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Instructions

Important: The application must be submitted within 90 days of service completion. Incomplete or illegible applications will not be processed and will be returned to the submitting party for correction. Also, specialized or Trade Ally's forms will not be accepted in lieu of this application form.

Please review all items listed below prior to the submission of this application:

1. Complete all parts of the incentive applications. Note the following required information that is often overlooked:
 - a. Customer information as shown on your electric bill including account number and name.
 - b. Trade Ally signature
 - c. Serviced measure information in the chart on page 2 (other charts or tables are not acceptable).
2. Additional information about this program and other programs offered by Duke Energy may be found by:
 - a. Visiting the program website at duke-energy.com/smartsaver.
 - b. Calling the program at 1-866-785-6209.
 - c. Emailing the program at incentives@dukeressmartsaver.com
3. Make a copy of all application documents for your records.

Program Rules and Equipment Eligibility Requirements

1. Work must be completed by a Participating Trade Ally. If you do not have a Trade Ally, please visit duke-energy.com/smartsaver to view a list of Participating Trade Allies.
2. A Smart \$aver incentive will only be paid upon successful completion of a Health Check, which includes an initial system test that identifies operating improvement opportunities, successful remediation of these opportunities, and a final system test evidencing that the unit is operating efficiently within all areas tested. *If repairs are required before the Health Check can be completed, the customer has the option to pay for these repairs or forfeit the Health Check incentive.
3. Customer must be served under a Duke Energy residential electric rate and have an active electric account with Duke Energy to qualify for the incentive.
4. The approved incentive will be processed and mailed within 45 days of the application's receipt.
5. All applications are subject to on-site inspection and payment will be mailed after the passed inspection (if inspection was required).
6. Incentive checks will only be mailed to the customer's mailing address as indicated on this application.
7. The amount and availability of incentives are subject to change. The program funding is limited and available on a first come, first served basis.
8. Only one account number per application is accepted. If upgrades are made across multiple account numbers, then separate applications must be made reflecting the quantities associated with each account number.
9. The incentive recipient assumes all responsibilities for any tax consequences resulting from incentive payment.
10. Incentives may not exceed the cost of the service.
11. Additional programs available from Duke Energy include the Smart \$aver Insulate and Seal, Smart \$aver HVAC Install along with the Power Manager program. Visit duke-energy.com and duke-energy.com/smartsaver for additional information.
12. The Trade Ally technician must fulfill all program requirements prior to performing a Health Check on behalf of the program. Visit duke-energy.com/smartsaver for additional information on becoming a Participating Trade Ally.