



Commercial & Industrial Incentive Application

Hawaii Energy

Effective from December 2010 and subject to availability of funding lasts.
This Program is available for and funded by the Commercial and Industrial Electric Utility Customers of Hawaii, Lanai, Maui, Molokai and Oahu and is administered under the direction of the Hawaii Public Utilities Commission.

Applications must be filled out completely, legibly and when possible submitted before the installation of the equipment.
Submission of a complete application must be within six (6) months of invoice/sales receipt date to be considered for a rebate.

Account Name: _____ Project / Building Name: _____

Account No _____

Installation Address _____ City _____ State ____ Zip _____

Building ID or Project Ref. (will be printed on the check statement) _____

No of Employees at the Install address _____ Facility Size (approx Sq. Ft.) _____ Year Built _____

Contact Person (for questions on application) _____ Title _____

Mailing Address _____ City _____ State ____ Zip _____

Phone _____ Cell _____ Fax _____ Email _____

Trade Ally / Installing Company _____

Contact Person (for questions on equipment) _____ Title _____

Mailing Address _____ City _____ State ____ Zip _____

Phone _____ Cell _____ Fax _____ Email _____

Application is for (select one) Existing Building Newly Constructed Building
Technology Selection (Check ONLY ONE per Application) Lighting Motors Air Conditioning Window Film
 Domestic Water Booster Pumps VFD for HVAC Engineering Study Other _____

Equipment installed at the service address is used for this type of operation (select one)
 AOAO/Condo Cold Storage Education Grocery Health Hotel/Motel
 Industrial Office Restaurant Retail Warehouse Other _____

Incentive Check to be paid to this Payee (select one)
 Account Holder at Service Address Account Holder at Contact's Address
 Trade Ally Third Party* (complete information below) Government Special Handling (additional authorization form required)

***If Third Party Payee – Company Name** _____

Third Party Contact Person _____ Title _____

Third Party Mailing Address _____ City _____ State ____ Zip _____

Third Party Phone _____ Fax _____ Email _____

Federal Tax ID of Payee (SSN/FEIN): _____ **Tax Status:** Corporation Government Non-corporation

Anticipated Project Dates Start Date _____ Completion / Install Date _____

Estimated Incentive Amount (from the worksheet, subject to validation, qualification and verification) \$ _____

I have **read, understood, and agree** to the **Terms and Conditions** and the application procedure detailed **on the front and back** of this **Application**. I further understand that Hawaii Energy may report the Incentive payment on IRS Form 1099 unless I have checked the corporation tax status above. I am advised to consult my tax advisor concerning the taxability of the Incentive. Hawaii Energy is not responsible for any taxes that may be imposed on me or my business as a result of my receipt of this Incentive. By signing this document you are declaring that **Hawaii Energy is authorized to direct the Incentive payment to the Payee** as listed above. **I understand Incentives are not guaranteed**, available on a first-come, first-served basis and **subject to the availability of funds without notice**.

PRINT NAME _____ TITLE: _____

SIGNATURE _____ DATE: _____
Name / Title of the Company/Account Holder official responsible for authorizing project

FOR HAWAII ENERGY USE ONLY: _____ Application No. _____
Received Date _____ Processor _____ Commitment Date _____ Submitted for approval _____
Approved Amount \$ _____ 1st Approval _____ 2nd Approval _____ 3rd Approval _____



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General Information for applying for Hawaii Energy's Commercial and Industrial Incentives

- Applications must be filled out completely, legibly and when possible submitted before the installation of the equipment.
- Submission of a completed application must be within six (6) months of invoice/sales receipt date to be considered for a rebate.
- Program approval is not required prior to the purchase and installation of equipment; however, **prior approval is strongly recommended** to check if funding is still available and that the equipment qualifies for an incentive. **Applications for Energy Studies require written pre-approval from the Program.** Applications will be processed on a first-come, first-serve basis. Projects that receive program approval before the purchase and installation of equipment will have funds reserved for a limited period of time.
- The Program reserves the right to verify all projects, regardless of incentive level, via on-site inspection or data logging to verify energy savings.
- At any time, Applicants may contact the Program's staff to discuss a project, get assistance in preparing an application, or with any program related questions at 808-537-5577 (Oahu) or toll free at 877-231-8222

Proof of Purchase

The Applicants **must provide proof of purchase** of qualifying equipment prior to incentive payment. Proof will include an itemized invoice and equipment specification sheets. **Invoices must clearly show the manufacture, model number, and quantity of the equipment purchased.** Equipment specification sheets **must have the appropriate energy efficiency ratings data circled.** Incentives can only be paid for the equipment installed and placed into operation.

Application Process

Step 1: Applicant may fill out a Incentive application as soon as a project has been funded or authorized by their organization. Worksheets should be fill-in with the best known project scope and maybe adjusted after installation by contacting Hawaii Energy. Applicant may purchase and install equipment that meets or exceeds the efficiency requirements shown on the worksheets.

Step 2: Applicants must complete the Incentive application form and worksheet and attach invoice and all required supporting documentation to verify that installed equipment meets program efficiency levels. Incomplete applications will not be considered and will be returned to the applicant for completion. *For applications requesting program approval prior to the purchase and installation of equipment, the program will notify the Applicants when the review is complete and funds have been reserved.*

Step 3: Email/Mail/Fax Application to: **Hawaii Energy**
1132 Bishop St. Ste. 1800
Honolulu, HI 96813
Fax Number (808) 441-6068 or email signed document to: HawaiiEnergy@saic.com

Step 4: Applications and supporting technical documentation will be reviewed by program staff, and may conduct an onsite inspection to verify the installation of eligible equipment. Upon receipt and verification of all required documentation, the Incentive check will be issued. Please allow 6-8 weeks for processing, longer if documentation is unclear and/or has missing information.

Hawaii Energy's Commercial and Industrial Terms and Conditions

- 1) Incentives:**

Subject to these Terms & Conditions, Hawaii Energy (the Program) will pay incentives for the installation of qualified and verified Energy Efficiency Measures (EEMs) that meet eligibility.
- 2) Eligibility:**
 - a) "Applicant"** is a commercial rate schedule account holder of an electric utility on the islands of Hawaii, Lanai, Maui, Molokai, and Oahu that contribute into the Public Benefit Fund where the electricity-saving Energy Efficiency Measure has been installed. Incentives are awarded only to an eligible Account Holder. The Account Holder can reassign the incentive payment to the Trade Ally or designated Third Party. Applicants are ultimately responsible for the compliance with these Terms and Conditions.
 - b) "Qualifying EEMs"** are those electricity-saving Energy Efficiency Measures (EEMs) that are identified in the Program applications and associated materials for the various Standard/Prescriptive and Custom Incentives. Unless explicitly approved before installation by the Program, all installed equipment must be new, meet Program specification requirements and be fully in operation prior to the incentive being paid.
 - c) Incomplete and/or unsigned applications** will be returned unprocessed.
 - d) For completed projects,** a completed application, worksheets, invoices and other need support documents must be received within six months of the installation date/invoice date to be considered for incentive.
- 3) Installation Verification and Data Collection:**
 - a) The Program** may conduct an inspection of the facility to verify pre-installation conditions or confirm installation prior to incentive payment, at any time after receipt of the application and up to 5 years after the payment of Incentive.
 - b) The Applicant** must provide reasonable access to the facility, the installed equipment, related documentation and data need to verify the application.
 - c) The Program** may install metering devices on EEMs for program data collection, measurement and verification purposes.
- 4) Compliance:**

The Applicant is responsible to abide by all applicable laws, rules and regulations, and to comply with all federal, state, and local codes. Applicant agrees that if the EEM specified in this application is not still in full effect for a period of five years, will return to Hawaii Energy the prorated portion of the incentive dollars based on the expected life (as determined by Hawaii Energy) of the measure for which Incentives were provided.
- 5) Program Availability:**

Incentives are available on a first-come, first-served basis, based upon the received date of a fully completed and signed application of which is subject to the availability of funds without notice. Program availability, program terms and equipment eligibility may change. **Receiving an incentive is not guaranteed.**
- 6) Publicity:**
- 7) Disclaimers:**
 - a) The Program** is not responsible for any tax liability imposed on the Applicant as a result of the payment of incentives.
 - b) The Program** is not responsible for obtaining any missing information, signatures, invoices or going to the installation site or contacting the Applicant to inform Applicant of incomplete or missing documentation.
 - c) The Program** does not expressly or implicitly warrant the performance of installed equipment, the quality of any contractor's work, or that the EEMs will result in any energy or cost savings.
 - d) The Program** is not responsible for the proper disposal or recycling of any waste generated as a result of this project.
 - e) The Program** does not endorse any particular market provider, trade ally, manufacturer, product, laborer or system design by offering this program.
 - f) The Program does not guarantee that funding will be available for payment of Incentives** until this application has been verified and approved by Hawaii Energy. **Submission of the Application does not warrant payment** under any circumstances should the application not be approved or funding is not available.
 - g) Applications for Energy Studies** require written pre-approval from the Program. Studies are not used to show the competitive advantage of one vendor versus another vendor, or to take inventory of an applicant's equipment. See Energy Studies worksheet for more details.
- 8) Indemnification and Limits of Liability:**
 - a) Applicant** shall hold harmless the Program and the Program's agents, contractors, employees, officers and directors from any and all liability, claims, loss, damage, death or injury including reasonable attorneys' fees and costs, arising out of or relating to the installation, use and maintenance of the equipment, designs, practices or methods involved in this Customer's project.
 - b) In no event** shall either the Program, or any other indemnified party be liable for any punitive, exemplary, special, indirect, incidental or consequential damages (including, but not limited to, lost profits, lost business opportunities, loss of use or equipment down time, and loss of or corruption to data) arising out of or relating to this Agreement, regardless of the legal theory under which such damages are sought.
- 9) Entire Agreement:**

The entire agreement between the Applicant and the Program is composed of an approved, a fully-executed application, these Terms and Conditions, and, as applicable, pre-installation approval letters, invoices, receipts and any and all such other documentation as required.