

## Program Rebate Application

**Instructions:**

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| <p>1. Please complete all steps below. Incomplete applications will delay the review process. This application is for energy efficiency improvements installed at ONE eligible residential address. Please complete separate applications if applying for rebates at more than one address.</p> | <p>2. To set up an optional Home Energy House Call, contact a Santee Cooper Energy Advisor by phone at 843-347-3399 ext. 3910 (Horry and Georgetown counties) or 843-761-8000 ext. 3910 (Berkeley County) or by e-mail at <a href="mailto:energy.advisor@santeecooper.com">energy.advisor@santeecooper.com</a>.</p> <p>3. All necessary documents and information must be submitted no later than November 30 of the program year.</p> |
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### Step 1 Customer Information

Customer Name (as it appears on Santee Cooper bill)	Last 4 Digits of Social Security Number
Installation Address	City State Zip
Electric Account Billing Address (if different from Installation Address)	City State Zip
Santee Cooper Account Number(s) associated with Installation Address (located on Santee Cooper bill)	
Contact Name	Contact Phone Number Email

## Step 2

### Rebate Estimator

Calculate the rebate value for each measure using the table below. Add the totals in the “Rebate Amount” column to calculate the “Total Application Rebate.” Note: The home must be all electric, excluding hybrid heat pumps, gas cooktops and gas fireplaces. If customer has a gas water heater, they do not qualify for a rebate. Please reference the Program Manual for all other eligibility requirements.

Energy Efficiency Upgrades	Unit Type	Quantity of Units		Rebate Rate		Rebate Amount (\$)
Variable Speed Mini-Split Heat Pump (≥16 SEER, ≥ 8.5 HSPF) <sup>1</sup>	# of Systems		x	\$75 Per System	=	
Variable Speed Mini-Split Heat Pump (≥18 SEER, ≥ 9.5 HSPF) <sup>1</sup>	# of Systems		x	\$175 Per System	=	
Single Phase Heat Pump (≥15 SEER, ≥ 8.5 HSPF) <sup>1</sup>	# of Systems		x	\$200 Per System	=	
Single Phase Heat Pump (≥17 SEER, ≥ 9.0 HSPF) <sup>1</sup>	# of Systems		x	\$600 Per System	=	
Geothermal Heat Pump (ENERGY STAR Qualified) <sup>1</sup>	# of Systems		x	\$600 Per System	=	
Hybrid Heat Pump (≥15 SEER, ≥ 8.5 HSPF) <sup>1</sup>	# of Systems		x	\$500 Per System	=	
Hybrid Heat Pump (≥17 SEER, ≥ 9.0 HSPF) <sup>1</sup>	# of Systems		x	\$700 Per System	=	
Whole Home Duct Sealing <sup>2</sup>	# of Systems		x	\$250 Per System	=	
Whole Home Duct Replacement <sup>2</sup>	# of Systems		x	\$500 Per System	=	
Ceiling Insulation – Existing ≤ R-19; Post-Improvement ≥ R-38	Sq. Ft.		x	\$6 per 100 Sq. Ft.	=	
Ceiling Insulation – Existing ≤ R-11; Post-Improvement ≥ R-38	Sq. Ft.		x	\$13 per 100 Sq. Ft.	=	
Air Infiltration Improvement – CFM50 Leakage Reduced by ≥ 10%	CFM50		x	\$15 per 100 CFM50	=	
Single Family Smart Thermostat <sup>3</sup>	# Systems		x	\$125 Per System	=	
Heat Pump Water Heater <sup>4</sup>	# Systems		x	\$400 Per System	=	
Solar Water Heater <sup>4</sup>	# Systems		x	\$700 Per System	=	
Smart Energy Existing Home Bonus <sup>5</sup>				\$200 Per Customer	=	
				<b>Total Application Rebate</b>		

<sup>1</sup>Maximum of two (2) HVAC rebates per residence.

<sup>2</sup>Maximum of two (2) Duct Improvement rebates per residence.

<sup>3</sup>Maximum of two (2) qualifying thermostats per home. Thermostat must be Wi-Fi enabled and either self-learning or occupancy sensing.

<sup>4</sup>Maximum of two (2) Water Heater rebates per residence.

<sup>5</sup>Install three or more of these measures within 60 days to be eligible for the Smart Energy Existing Home Bonus: Air Infiltration Improvement, Heat Pumps, Whole Home Duct Sealing, Whole Home Duct Replacement, Smart Thermostat, Heat Pump Water Heater, Solar Water Heater and Ceiling Insulation.

## Step 3

### Rebate Payment Information

The rebate(s) will be made payable and mailed to the person and address as indicated below (check one):

- Customer Billing Address     Third Party Payee (Complete the Rebate Release Information section below)

### Rebate Release Information (Authorizing payment to be sent to someone other than the Customer)

**Important:** Complete this section only if rebate payment is to be directed to someone other than the Customer indicated above. Please note that the federal government may require that a Form 1099 be issued to you, the Customer, for the rebate amount paid to your contractor. Please consult with your tax professional for tax implications.

I am authorizing this rebate payment to the individual or business named below and I understand that I will not be receiving the rebate payment check from Santee Cooper. I also understand that my release of payment to the individual or business named below does not exempt me from the rebate requirements outlined in the application.

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Customer Authorization (please print)	Signature	Date
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Check should be made payable to:

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Third Party Payee	Contact Phone Number
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Payee Mailing Address	City	State	Zip
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## Step 4

### Terms and Conditions

Santee Cooper is implementing a Smart Energy Existing Homes program ("Program") to provide qualifying Customers with rebates to facilitate the installation of energy efficient equipment, products, upgrades and services at their existing residential facilities. These Terms and Conditions set forth the participation requirements for Customers applying for rebates through the Program. By signing below, the Customer named in the Rebate Application ("Customer") is agreeing to comply with and be bound by these terms.

**Program Administrator.** Santee Cooper has contracted and authorized Nexant, Inc. ("Program Administrator") to administer this Program including such activities, but not limited to; facilitate project information requests from Customers and Trade Allies; Trade Ally recruitment, training and management; and conducting measurement and verification activities.

**Trade Allies.** Customers are required to use a vendor or installer who is a member of Santee Cooper's Residential Trade Ally network ("Trade Ally") for the purchase and installation of all the energy efficiency measures offered by the Program except Heat Pump Water Heaters, Solar Water Heaters, and Smart Thermostats. Trade Allies are independent contractors with respect to the Program, and are not authorized to make representations or incur obligations on behalf of Santee Cooper. Participation as a Trade Ally does not constitute an endorsement by Santee Cooper, nor does it certify or guarantee the quality of work performed. A listing of Trade Allies is available online at <https://www.santeecooper.com/Residential/Reduce-the-Use-and-Save/Trade-Ally-List.aspx> or by contacting the Program Administrator at [SCTradeAlly@nexant.com](mailto:SCTradeAlly@nexant.com).

**Program Funding.** This Rebate Program is available for 2 consecutive Program Years beginning December 1, 2016 to November 30, 2018. The 2017 Program Year runs from December 1, 2016-November 30, 2017. The 2018 Program Year runs from December 1, 2017 to November 30, 2018. 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. Customers requesting rebates after all available Program funding for the Program term is committed, will be offered the option to be placed on a waiting list, in the order that the applications are received by Santee Cooper, for consideration should the Program term be extended or additional funding becomes available.

**Customer and Measure Eligibility.** To be eligible for the Program, applicants must meet the customer and equipment eligibility requirements as set forth in the Santee Cooper Smart Energy for Existing Homes Program Manual ("Program Manual") incorporated herein by reference. Customer must be the owner of the home or be authorized by the owner(s) to implement the Program qualifying upgrades and installations. Customers who have received rebates through the Program for eligible measures are not eligible to receive rebates related to those measures through any other program for the period specified in the Measure Ineligibility Periods table as provided in the Program Manual.

**Program Participation Process.** Customer must complete the Program participation process as outlined in more detail in the Program Manual. This process includes, but is not limited, to Customer complying with the following:

1. Customer must submit a SEEH Home Energy Evaluation Application

and receive an evaluation conducted by a Santee Cooper Energy Advisor prior to the completion of Air Infiltration Improvement measures or any Heat Pump installation

2. Customer must use a Trade Ally to purchase and complete the installation of qualifying measures offered by the Program, with the exception of Heat Pump Water Heater, Solar Water Heater and Smart Thermostats
3. Customer must complete and submit the Rebate Application and all required documentation as specified in the Required Documentation section above (collectively the "Rebate Application") within 10 business days after the measures are installed or completed in order to be eligible for rebates. The Rebate Application is incorporated herein by reference.

**Rebate Application.** Customers applying for measures installed during the 2017 Program Year must submit the Rebate Application and required documentation by November 30, 2017 and in accordance with Program requirements. Customers applying for measures installed during the 2018 Program Year must submit the Rebate Application and required documentation by November 30, 2018 and in accordance with Program requirements. Please see the Program Manual for details regarding required documentation. Customer understands that submission of an application, even if correct and complete, does not guarantee payment of rebates.

**Rebate Payments.** Rebates for the implementation of the qualifying equipment are listed in Rebate Estimator table of this Rebate Application and in the Program Manual. Rebate payments are one-time only and are capped at 50% of the eligible project costs. Eligible project costs are defined as the actual costs incurred by the customer for the evaluation, construction, installation, implementation, and commissioning of eligible energy-efficiency measures. Rebates will be in the form of a check and made out to customer or its designated assignee and will be mailed within two to three weeks after the final approval of the customer's rebate application. Program rebates for Heat Pump Tune-Ups are paid directly to the Trade Ally. Payment of the final rebate amount is based on Santee Cooper's approval of installed measures and Customer meeting all eligibility and Program requirements. Customer understands that Customer is responsible for paying the Trade Ally any fees associated with installing the qualifying energy efficiency measures and that Santee Cooper has no part in any agreement between Customer and the Trade Ally which Customer selects to complete the work.

**Inspections.** As part of the Rebate Application review process and for up to two (2) years after a rebate payment, Santee Cooper may request additional documentation and conduct any site inspection activities necessary to confirm eligibility. Failure to provide or complete any of the requested information or program requirements may result in the return of the Rebate Application and denial of rebates through the Program. The site visit is not a safety review and is not intended for any other purposes than verifying equipment rebate eligibility. Customer agrees to cooperate and provide Santee Cooper or its designated agents access to the equipment, upgrades and meters for as long as the equipment or upgrades are installed. Customer will provide any requested information relating to the facilities, systems, and installed equipment or upgrades, as requested by Santee Cooper or Program Administrator to allow for verification of compliance with Program terms, accuracy of project documentation, and for verification of energy consumption. In the case of a rented or leased residence, Customer certifies that Customer has obtained appropriate permission from the building owner(s).

**Tax Liability.** Customer acknowledges that receipt of any rebate pursuant to the Terms and Conditions 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. Customer should consult his or her own tax advisor with respect to the tax treatment of rebates provided pursuant to the Terms and Conditions. Nothing in these Terms and Conditions is intended to constitute tax advice and cannot be used for the purpose of avoiding penalties under the Internal Revenue Code.

**Customer Information.** By signing the Rebate Application, Customer authorizes and acknowledges that Santee Cooper may duplicate, disseminate, release and disclose Customer's information relating to Customer's Rebate Application (including the entirety of its contents), and any other information related to the Customer's participation in the Program, including but not limited to account information and billing data, energy usage, and tax identification numbers to Program Administrator and Trade Allies, as applicable, and any other third party utilized by Santee Cooper for the purposes of processing the Rebate Application, to verify or audit Program records or system installation, operation and results, or as required to comply with state and/or federal law, fraud prevention, regulation, and other legal action; in those cases, Santee Cooper and its subcontractors shall comply with all legal requirements of the jurisdiction of the individual whose Customer data would be disclosed before making such disclosure.

**Project Installations.** Customer acknowledges that while the Program may provide rebates for the installation of qualifying equipment and upgrades, neither Santee Cooper nor Program Administrator will install any equipment. Customer is solely responsible for the selection of equipment/upgrade to be installed and for the selection of a Trade Ally to complete the installation or service of equipment. Customer acknowledges that responsibility for delivery and workmanship related to any equipment or services the Customer procures with a Trade Ally or third party installer exclusively rests with that Trade Ally or third party installer.

**Fraud.** 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. Any person who knowingly files an application containing any materially false information or who purposely or misleadingly conceals information subjects such person to criminal and civil penalties. Any and all funds determined to have been acquired on the basis of inaccurate or fraudulent information must be returned to Santee Cooper. This section shall not limit other remedies that may be available for the filing of a false or fraudulent application, including, but not limited to, referral to law enforcement authorities.

**No Warranties.** Santee Cooper and Program Administrator do not make any warranties, and both Santee Cooper and Program Administrator expressly disclaim all warranties or representations of any kind with respect to the design, manufacture, construction, safety, performance or effectiveness of any potential energy savings, equipment installed, and/or services rendered by any person or entity in connection with the Program.

**SANTEE COOPER AND PROGRAM ADMINISTRATOR DISCLAIM ALL WARRANTIES, EXPRESS OR IMPLIED, TO THE MAXIMUM EXTENT PERMITTED UNDER LAW, WHETHER STATUTORY OR OTHERWISE, INCLUDING WITHOUT LIMITATION ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.**

**Limitation of Liability.** To the fullest extent allowed by law, Santee Cooper, Program Administrator, and their respective employees' total liability, regardless of the number of claims, is limited to the amount of the rebate payment approved in accordance with the Program Terms and Conditions, and Santee Cooper, Program Administrator and its affiliates and their respective directors, employees, contractors, agents, and service providers shall not be liable to the Customer or any other party for any other obligations.

Notwithstanding anything in these Terms and Conditions to the contrary, Santee Cooper, Program Administrator, and their respective directors, officers, employees and/or agents shall not be liable hereunder for any type of damages, whether indirect, incidental, consequential, exemplary, reliance, punitive or special damages, including damages for loss of use regardless of the form of action, whether in contract, indemnity, warranty, strict liability or tort, including negligence of any kind.

**Compliance with Law.** Customer, at its own expense, is responsible for meeting all requirements and complying with all local and state laws, rules and codes concerning the Program, including without limitation, the installation and maintenance of eligible equipment. Customer shall, at its own expense, obtain and maintain licenses and permits needed to install eligible equipment.

**Governing Law.** The laws of the State of South Carolina shall govern the interpretation, validity, and effect of these Terms and Conditions, the parties' performance thereunder, and all matters incident thereto. Any legal action associated with the Program must be initiated with any South Carolina circuit court of competent jurisdiction.

**Program Changes.** Santee Cooper reserves the right to change or cancel the Program or its Terms and Conditions at any time without notice. Preapproved applications, for which the 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 Santee Cooper. The Terms and Conditions may be terminated by Santee Cooper, Program Administrator or Customer at any time without cause.

**Entire Agreement.** The terms 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. Santee Cooper and Program Administrator shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind that is not set forth herein. To the extent there is any conflict between the language of the Program Manual and these Terms and Conditions, these Terms and Conditions shall prevail.

## Acceptance of Terms and Conditions

By signing below, I certify that:

1. I have the authority to bind the Customer to the Terms and Conditions
2. I have read, understand, and agree to be bound by and comply with the terms set forth herein and such other terms as set forth in the Program Manual
3. The information provided to Santee Cooper or Program Administrator in and as part of the Customer Application is accurate and complete and I will notify Santee Cooper immediately of any changes to the information.
4. I have used a licensed contractor, as appropriate, and have complied with applicable permitting requirements for applicable installations.

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Authorized by (please print)

Signature of Authorized

Date

### Send Completed Rebate Application and Required Documentation to Your Energy Advisor or to:

Santee Cooper Energy Support Services  
305A Gardner Lacy Rd  
Myrtle Beach, SC 29579  
Email: [Energy.Advisor@santeecooper.com](mailto:Energy.Advisor@santeecooper.com)  
Fax: (843) 347-8781

Please allow up to 2-3 weeks to receive your rebate payment after the final approval of your Rebate Application.