

# Trade Ally Network

## Frequently Asked Questions



### What is the difference between an instant discount, rebate, and incentive?

- An **instant discount**, sometimes referred to as “midstream,” is provided at the point of sale, such as from the distributor to the contractor, with limited paperwork. This discount is provided by the utility to encourage energy efficient purchases where an application to the utility would not be feasible. Instant discounts are expected to be passed on to the end-use customer.
  - o Examples include residential and commercial heat pumps < 5.4 tons, heat pump water heaters < 120 gallons, electronically commutated (EC) circulation pumps, and ultra-low temp freezers.
  - o Heat pump water heaters include a \$100 spiff (a supplemental incentive for participating in our program) for contractors.
- A **rebate** is a flat, “deemed” payment for installing a piece of equipment, and savings are already pre-calculated. These payments are issued after proof of installation, such as through an invoice, and typically are quick to issue.
  - o Examples include an array of commercial-only items such as advanced rooftop controls (ARC), commercial kitchen equipment, ice machines, and demand control ventilation (DCV) fans.
- An **incentive**, sometimes referred to as “downstream,” is a payment that City Light issues after the completion of a project. Incentive payments are estimated prior to installation, then issued (paid) based on the as-built energy savings provided by the project, calculated by an Energy Management Analyst (EMA).
  - o Note that incentives are for commercial, industrial, and multifamily- projects and require a contract (participation agreement) to be signed before the installation can begin.

### Should I apply for an instant discount, rebate, or incentive?

Navigate to [Energy Efficiency Program Tools and Resources](#) to find out which program is best suited for your project.

### What are the options for applying for a project incentive?

Apply [online](#), e-mail [SCEnergyAdvisor@seattle.gov](mailto:SCEnergyAdvisor@seattle.gov), or contact an EMA you have worked with previously. Contact an EA at 206-684-3800 if you have any questions.

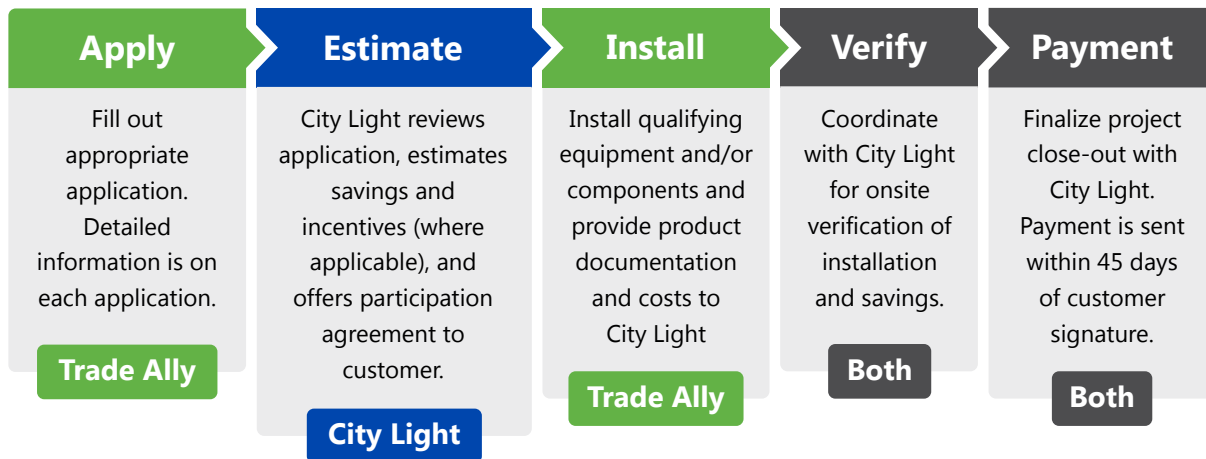
### What is the difference between an EA and an EMA?

An Energy Advisor (EA) can answer any general questions about City Light and energy related topics, incentives, the incentive process, how to access additional information prior to submitting a project, and technical questions. The EAs do not develop projects, but can direct the inquirer to where to get started, and connect them to the Energy Management Analysts (EMAs). EMAs are assigned to each project and can advise on project-specific questions and status updates.



## What does a typical incentive process include?

The following graphic provides a general overview of the incentive process steps, which vary depending on the incentive and project type. For example, some incentives include a partial payment after savings are verified post-installation.



## How long does it take to receive approval for a submitted project?

Once all the information provided by a customer or contractor is complete to help determine estimated project costs, savings, and incentive payment, then City Light will send the customer a Participation Agreement within 5–10 business days. We will let you know when the customer has signed the Participation Agreement and you can start the install.

## What documentation is required to verify a project?

- Detailed estimate of project cost
- Cut sheets and/or technical specs
- Final invoice
- W-9 (signed under 2 years ago with the latest version of the W9 form for the entity receiving the incentive - customer or contractor).

The documentation needed varies depending on the type of incentive, and more complex projects may require additional documentation. Work with your EMA during the application process to confirm.

## Can I submit multiple projects at once?

Yes! Just not for the same equipment or project. Each submission must be for a different measure to be implemented.

## Can I get incentives from both City Light and PSE at the same time?

For specific products like a heat pump or lighting control system that uses City Light electricity, only City Light incentives apply. But for larger custom incentive projects for customers that use both City Light electricity and Puget Sound Energy natural gas, you may qualify for incentives from both utilities. Check with your assigned EMA for details. Whole building programs may be more common in this scenario.

## I've already purchased and/or installed qualifying equipment — can I still receive payment?

For commercial equipment that qualifies for rebates, invoices must be submitted within 90 days of purchase date in our online form for "Simple Business Rebates." Custom incentive projects must first receive approval from City Light to proceed; we do not offer incentives retroactively. As a municipal utility that uses ratepayer dollars to fund

incentives, we must be able to prove that the incentive was a factor in the conservation project moving forward. We aim to be good stewards of our ratepayer funds.

If you've purchased equipment from a participating distributor in our midstream program and are not sure if you received the discount, you may contact the distributor within 90 days to ensure the discount was received.

### **What are common reasons for delays in project approval and/or payment?**

Common reasons for delays are missing documentation highlighted in the Participation Agreement or Project Specifications and needing to submit requested information or corrections. Complex projects typically take longer to process for contracting and issuing payment.

### **Can I update project details after submission?**

We understand there sometimes may be changes to the scope of projects or the selected measures. Work with your EMA as soon as possible after identifying a change to update the details that impact energy savings and incentive estimates. Documentation on the source of the change may be required to be able to verify and pay the as-built implementation.

### **How are incentives disbursed after project close-out?**

A payment request is sent to the customer for signature. If the incentive is directed to the contractor, a payment assignment of funds is sent to the customer, then the contractor, for signature.

### **When should I expect my check?**

After a customer signs a payment request, it can take up to 45 days to receive an incentive check. Projects must be completed and savings verified before payment request is sent.

### **Can I receive progress payments?**

Yes, but only for specific projects. Typical incentive projects are paid after final installation verification. However, some incentive project types (including multi-phased projects), such as major HVAC controls upgrades, provide a base incentive after installation verification as well as a performance incentive after 12 months and meeting minimum savings target.

### **How can I provide feedback about the process or provide input to your programs?**

Your feedback is very important to us! Starting soon, you will receive a more dedicated survey after the project completion. You can also fill in the "[Connect with Us](#)" form.



**Scan the QR code to visit the Trade Ally Hub and access more tools and resources to complete your energy projects.**