

Rocky Mountain Power - All States
Wattsmart[®] Business
Trade Ally Handbook

Effective: April 1, 2025
v 03/25/25

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SECTION 1 – INTRODUCTION / OVERVIEW

1.1 COMMON TERMS USED IN HANDBOOK

The table below lists several commonly used terms included in this handbook, along with the respective alternative forms of the terms. Both versions of each term can/will be used interchangeably throughout the handbook.

Formal Name	Alternative Form
Rocky Mountain Power	Utility
Wattsmart Business	program
Program Implementer (Evergreen)	Program Administrator
Wattsmart Business Trade Ally Network	Trade Ally Network, Network
Wattsmart Business Trade Ally	trade ally
Wattsmart Business Pro Network	Pro Network
Wattsmart Business Pro Network Trade Ally	Pro Network Trade Ally
Wattsmart Business Program Coordinator	Coordinator
Wattsmart Business Trade Ally Application Agreement	Agreement
Wattsmart Business Trade Ally Network Application	Application

1.2 WATTSMART® BUSINESS TRADE ALLY NETWORK

Rocky Mountain Power (“Utility”) makes available the Wattsmart Business Trade Ally Network (“network”) for qualifying participants (each a “Wattsmart Business Trade Ally” or “trade ally” and collectively, “Wattsmart Business Trade Allies” or “trade allies”) to promote Utility’s Wattsmart Business Program (“program”) to Utility’s customers. Contractors, distributors and other trade professionals who sell, install or specify energy-efficient products can apply to participate in Rocky Mountain Power’s Wattsmart Business Trade Ally Network. The network enables Rocky Mountain Power and trade allies to collectively serve their mutual customers. Rocky Mountain Power assists trade allies in marketing the advantages of high-efficiency electrical equipment to eligible customers by providing materials such as brochures and case studies, identifying cost-effective installation opportunities and assisting customers with obtaining incentives.

1.2.1 OTHER PROGRAM NETWORKS

This handbook is designed for use by approved Wattsmart Business Trade Allies and outlines the benefits, criteria, and expectations of the Wattsmart Business Trade Ally Network.

Trade allies may participate in other Wattsmart Business program offers including: Lighting Instant Incentives, HVAC Instant Incentives and Small Business, all of which are not outlined herein.

<p>Wattsmart Business Pro Network</p>	<p>The program may recognize top-performing trade allies as Pro Network contractors based on the level of program participation, project quality, application submission quality, industry training and customer and program feedback.</p>	<p>See Section 4 for</p> <ul style="list-style-type: none"> - How to apply - Benefits - Additional requirements
<p>Small Business Enhanced Lighting</p>	<p>Approved participating trade allies will work with eligible small business customers identify and install efficiency upgrades. Incentives will be paid directly to participating trade allies to directly reduce customers' up-front cost of eligible high-efficiency lighting equipment.</p>	<p>Submit an online application to wattsmartbusiness.com/SBE OR Submit a request to wattsmartbusiness@evergreen.energy</p> <p>Must be a Wattsmart Business Trade Ally in good standing in order to apply.</p>

SECTION 2 – NETWORK BENEFITS

2.1 TRADE ALLY BENEFITS

The benefits table below provides an example of possible benefits available by participating in the Wattsmart Business Trade Ally Network. In order to receive benefits, Wattsmart Business Trade Allies shall comply with any and all requirements as described in the Network Requirements section below.

BENEFITS	
<p>Program Recognition</p>	<ul style="list-style-type: none"> • Trade ally name and contact information listed in the Rocky Mountain Power “Find a Trade Ally” search tool promoted to Rocky Mountain Power customers. • Notification of Participation as Wattsmart Business Trade Ally. • Eligible to receive Wattsmart Business Trade Ally awards.
<p>Instant Project Updates</p>	<ul style="list-style-type: none"> • Access to project status via the online trade ally portal.
<p>Incentive Calculators</p>	<ul style="list-style-type: none"> • Access to proprietary incentive calculator tools.
<p>Project Support</p>	<ul style="list-style-type: none"> • Dedicated Wattsmart Business coordinator to support your business efforts.
<p>Marketing Support</p>	<ul style="list-style-type: none"> • Wattsmart Business program marketing materials. • Use of Wattsmart Business Trade Ally logo as described in Marketing Guidelines section.
<p>Training Opportunities</p>	<ul style="list-style-type: none"> • Technology and program training.
<p>Program Communication</p>	<ul style="list-style-type: none"> • Be the first to know about program changes with program eblasts and quarterly newsletters.

2.1.1 WATTSMART BUSINESS TRADE ALLY NETWORK ONLINE RESOURCES

The Wattsmart Business Trade Ally [website](#) provides valuable resources including:

- Project portal access for project status.
- Privileged access to on-demand incentive calculator tools.
- Easy-to-find forms and program materials including marketing collateral.

- Resources page with access to our learning management system, video tutorials and trainings.
- Pro Network storefront with branded materials (for approved Pro Network Trade Allies only).
- News page.
- Find-a-Trade-Ally tool.
- Contact information.

SECTION 3 – NETWORK REQUIREMENTS

As an approved Wattsmart Business Trade Ally, the Wattsmart Business Trade Ally shall provide support and assistance in the identification of energy efficiency opportunities available to customers within the program. Trade allies shall comply with any and all requirements as described here including, but not limited to, the following:

3.1 PARTICIPATION REQUIREMENTS

- Maintain current company contact information in program systems.
- Project completion requirements:
 - Complete at least one project installation in the past 12 months, or
 - Submit at least one valid new project in the past 12 months, or
 - Have at least one active project in the current year.
- Utilize current version of incentive calculator.
- Recommend and install energy-efficient technologies in accordance with Rocky Mountain Power and program/network standards.
- Meet project submission standards as listed below in Section 3.10.
- Meet project satisfaction requirements including positive customer and coordinator feedback as listed in Section 3.10.1.
- Positively promote the utility and program to all eligible customers.
- Successfully complete and submit program-program-related documents as requested by the utility or Program Administrator.

3.2 TRAINING REQUIREMENTS & INDUSTRY KNOWLEDGE

- Attend and require applicable representatives to attend utility -sponsored training and/or seminars at a minimum of one (1) annual trade ally event and one (1) periodic meeting per year or two (2) periodic meetings per year. The Program Administrator and the utility have the right to terminate the Agreement if the training requirements are not met.
- Possess experience selling and/or installing energy efficient equipment.
- Maintain a positive program performance history that program staff deems satisfactory.
- Lighting trade allies will be given preference in the selection of the Pro Network by having one full-time staff person holding a qualifying certification including:
 - [Lighting Certification \(LC\)](#)
 - [Certified Lighting Management Consultant \(CLMC\)](#)
 - [The Certified Lighting Efficiency Professional Program \(CLEP™\)](#).
 - [Certified Apprentice Lighting Technician™ \(CALT™\)](#)
 - [Certified Energy Manager® - CEM®](#)

3.3 REFERENCES

The program will review publicly available reference sources. Additionally, the program may request additional customer or trade ally references as necessary. Ongoing Wattsmart Business Trade Ally status will be contingent upon continued positive customer reviews of provided energy efficiency services.

3.4 PROGRAM MARKETING

Adhere to program marketing guidelines as listed in Section 9 including distribution of program -approved marketing materials and use of a utility logo.

3.5 LICENSE REQUIREMENTS

The Wattsmart Business Trade Ally shall maintain any and all applicable license(s) and insurance coverage(s) appropriate for the type of work the organization performs and in accordance with prudent business and construction industry practices and as required by federal, state or local law.

The Wattsmart Business Trade Ally shall provide proof of such licenses and insurance coverages, as applicable and if requested by the utility or Program Administrator.

3.6 INSURANCE REQUIREMENTS

Each Wattsmart Business Trade Ally who provides installation and/or contracting services to utility customers, either directly or through its subcontractors, is required to maintain minimum insurance coverages and limits specified below and provide proof of such insurance with their application. Upon approval to the network, and on an annual basis, the Wattsmart Business Trade Ally shall cause its insured to deliver a Certificate of Insurance to the Program Administrator documenting that the Wattsmart Business Trade Ally maintains such minimum insurance coverages. Such insurance is to be written by companies reasonably satisfactory to the utility and Program Administrator. Wattsmart Business Trade Ally shall have insurance coverages in effect prior to commencing work on a customer project and throughout the duration of its participation in the network and cover the actions of any subcontractors providing program services. The required coverages are:

- Business Automobile Liability Insurance for coverage of owned, non-owned, hired or rented autos with minimum combined single limits of \$1,000,000 per accident for bodily injury, including death and property damage.
- Workers' Compensation Insurance in compliance with applicable Federal and State laws. Employers' liability with limits in the amount, if any, required by law but in no event less than \$1,000,000 Bodily Injury of Each Accident; \$1,000,000 Bodily Injury by Disease for Each Employee; \$1,000,000 Bodily Injury Disease Aggregate, and for a Small Business limit no less than \$500,000 Bodily Injury for Each Accident; \$500,000 Bodily Injury by Disease for Each Employee and \$500,000 Bodily Injury Disease Aggregate. A "Small Business" is defined as a company with under \$1,000,000 in annual revenue.
- Commercial General Liability Insurance on an occurrence basis including bodily injury and property damage, personal and advertising injury, contractual liability, and products and completed operation coverage with limits no less than \$1,000,000 each occurrence; \$1,000,000 General Aggregate; \$1,000,000 Products/Completed Operations Aggregate.

PacifiCorp, its parent, divisions, affiliates, subsidiary companies, co-lessees, or co-ventures, agents, directors, officers, employees, and servants shall be named as additional insureds in each of trade ally partner's insurance policies, except statutory Workers' Compensation. The Commercial General Liability additional insured endorsement will be ISO Form CG 20 10 or its equivalent. This language should be added to the Certificate of Insurance: *PacifiCorp, its parent, divisions, affiliates, subsidiary companies, co-lessees, or co-venturers, agents, directors, officers, employees, and servants, shall be named as additional insureds on*

Commercial General Liability and Automobile Liability policies.

The Certificate of Insurance shall provide that such insurance policies contain, or are endorsed to contain, the following provisions:

- Auto Liability and Commercial General Liability policies shall name PacifiCorp and Program Administrator and their respective directors, officers, and employees as an additional insured.
- Wattsmart Business Trade Ally insurance coverage shall be primary to any insurance carried by utility and Program Administrator and provide a severability of interests clause.
- Wattsmart Business Trade Ally hereby grants to the utility and Evergreen a waiver of any right@ to subrogation which any insurer of said Wattsmart Business Trade Ally may acquire against Utility and Evergreen by virtue of the payment of any loss under such insurance. Wattsmart Business Trade Ally agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the utility and Evergreen have received a waiver of subrogation endorsement from the insurer.

Trade ally shall provide not less than thirty (30) days' notice to the utility and the Program Administrator prior to any material change to its insurance coverage or to its insurer.

3.7 EVALUATION PERIOD

At any time, program staff reserves the right to require an evaluation period and to limit a trade ally's access to the network benefits described in Section 2. This may include, but is not limited to, excluding the trade ally from the Rocky Mountain Power "Find a Trade Ally" tool. The evaluation period may include having the trade ally complete a minimum number of program projects, complete program and network training, and obtain a satisfactory review of customer testimonials regarding the trade ally's services.

3.8 PROGRAM SERVICE EXPECTATIONS

- Familiarity with the current program, its processes, offerings and requirements.¹
- Servicing customers and promoting the program positively.
- Performing quality workmanship.
- Delivering customer satisfaction and education.
- Responding promptly to customer and utility inquiries.
- Informing customers of 1099 reporting related to incentive payments.
- Informing customers that they may be asked to respond to calls from program evaluators up to three (3) years after project completion. Trade allies are to cooperate with evaluators and answer questions as requested.
- Recommending and delivering quality energy efficiency upgrades to customers based on the applicable state energy code and/or program requirements per state and IES guidelines for the facility type.
- Providing a safe work environment.
- Correctly disposing of all hazardous waste materials, including ballasts, fluorescent tubes, refrigerants and any other items in compliance with the laws and regulations of the location in which the project is completed.²
- Conducting business in an honest and ethical manner and in accordance with all applicable laws and program

¹ Include in trade ally's contract with the customer the minimum technology/industry/manufacturer standard warranty **for the equipment installed.**

² In the event that any applicable statute, regulation, ordinance or code conflicts with those standards, it shall have **precedence over those standards.**

requirements.

- Invoicing customers with a breakout of material costs, labor costs, and other costs identifying the materials and services provided. If the incentive is assigned to the trade ally, the incentive discount is line-itemed on the invoice.
- Applying sales tax in accordance with laws and regulations of the state in which the project is completed.
- Correcting, at the trade ally's cost and expense, problems/defects relating to equipment warranties according to minimum technology/industry standards.

3.9 CODE OF CONDUCT / ETHICS REQUIREMENTS

- Build trust with customers and program staff: Establish and maintain a positive track record of excellent customer service, install high quality energy efficiency projects and equipment, submit accurate and complete incentive applications, and provide rapid response in correcting mistakes.
- Advertise honestly: Adhere to the established marketing and advertising standards and guidelines.
- Tell the truth: Honestly represent the Wattsmart Business program, trade ally's program, trade ally's involvement with the program and the program requirements/processes.
- Be transparent: Openly identify the nature, location and ownership of trade ally business, and clearly disclose all policies, guarantees and procedures that bear on a customer's decision to conduct an energy efficiency project.
- Honor promises: Abide by all requirements, expectations and guidelines indicated in this trade ally handbook. Correct any mistakes as quickly as possible.
- Be responsive: Address any disputes, concerns or questions quickly, professionally and in good faith.
- Embody integrity: Approach all business dealings, transactions and commitments with integrity.

3.10 PROJECT SUBMISSION STANDARDS

Expectations of a complete project submission and a satisfactory inspection are described below:

- All trade allies shall provide complete and accurate project submissions in compliance with the program documentation submission requirements. Any variance found between the initial project submission and the information provided when the project is completed, will be used to assess trade ally performance in the network. Any discrepancies found during application reviews or inspections will be viewed as poor performance and may be cause for additional action, a reduction in network benefits, or removal from the network. All trade allies shall cooperate fully with the review and inspection process and provide further information or documentation as requested.

Additional standards include, but are not limited to, the processes and procedures in Section 6.

3.10.1 PROJECT SATISFACTION REQUIREMENTS

Elements of a satisfactory project, including positive customer and coordinator feedback are described below:

- At any time during the submission process of a project or after it has been completed, feedback may be obtained from the customer or the coordinator about their experience with the trade ally who performed work on the project. This feedback will be used to assess trade ally performance in the network.

3.11 NON-COMPLIANCE

Becoming a Wattsmart Business Trade Ally Network member is a distinction which is only allowed to those trade allies willing to adhere to Rocky Mountain Power's values, policies, and requirements. Trade allies shall meet the program service expectations which include, but are not limited to (i) commitment to servicing customers and promoting the program positively, (ii) customer satisfaction and education, (iii) accurate and timely project documentation submissions, (iv) performing

quality workmanship, (v) providing a safe work environment, and (vi) conducting business in an honest and ethical manner and in accordance with all applicable laws and program requirements.

Trade allies will be reviewed periodically for compliance with the network and program requirements. If, at any time, program staff determine or suspect that a trade ally has violated a requirement as specified in the Network Requirements or failed to comply with any program requirements, the trade ally may be required to complete a correction action process, and may be put in evaluation status. Certain violations or repeated poor performance may result in a trade ally's removal from the network and termination of the trade ally's Wattsmart Business Trade Ally Application Agreement.

If the utility determines, at its sole discretion, that Wattsmart Business Trade Ally is involved in fraudulent activity, the utility may immediately terminate the Wattsmart Business Trade Ally's Agreement and remove Wattsmart Business Trade Ally from the network indefinitely. Such fraudulent activity that may result in immediate termination and permanent removal includes but is not limited to:

- Falsifying invoicing;
- Providing inaccurate information in a customer application, project documentation, or about existing or installed equipment;
- Forgery of customer signatures; or
- Misrepresenting the program requirements or Wattsmart Business Trade Ally relationship to customers or other third parties.
- Wattsmart Business Trade Ally fails to submit project documentation or deliverables in accordance with program documentation submission requirement.
- Wattsmart Business Trade Ally fails to submit project documentation or deliverable in accordance with program documentation submission requirements;
- Nonconforming or defective work has not been corrected in a timely fashion; or
- The utility has reasonable suspicion that Wattsmart Business Trade Ally is involved in misrepresentation or fraudulent activity.

In addition to or as an alternative to such termination, the utility may, at its option, offset any payment due to Wattsmart Business Trade Ally to reflect amounts owing from Wattsmart Business Trade Ally to the utility. The utility may withhold payment to be issued to a Wattsmart Business Trade Ally for any of the foregoing reasons. The utility shall give Wattsmart Business Trade Ally written notice, by email is sufficient, stating the specific reasons for withholding payment. When the reason for withholding payment is removed, payment will be made.

3.12 WATTSMART BUSINESS TRADE ALLY REMOVAL

1. In the event the Wattsmart Business Trade Ally is removed from the network, the Wattsmart Business network:
 - Shall cooperate with the utility in close-out activities specified in writing by the utility or Program Administrator and shall designate one contact person that will be responsible for all such close-out activities and this person shall attend all inspections and meetings as required by program staff.
 - Shall immediately cease promoting its participation in the network and in any utility program and shall return (at its own expense) any marketing material provided by the utility.
2. The utility, at its own discretion, may not accept any new customer incentive application in which a removed Wattsmart Business trade ally is listed as the contractor or as an assignee or as a subcontractor to an Wattsmart Business Trade Ally.
3. A removed Wattsmart Business Trade Ally is eligible to reapply to the network after twelve (12) calendar months from the date of notification of removal; however, (a) A Wattsmart Business Trade Ally who is

removed from the network due to fraudulent activity is considered permanently removed and may not reapply to the network at any time. A Wattsmart Business Trade Ally removed from the network more than once may be removed permanently from the network.

4. The utility reserves the right to extend a removal decision to any entities in common ownership with the removed Wattsmart Business Trade Ally.
5. The above remedies are in addition to any other remedies that are available to the utility or Program Administrator under the Wattsmart Business Trade Ally's agreement or by law.

SECTION 4 – PRO NETWORK BENEFITS & REQUIREMENTS

4.1 PRO NETWORK BENEFITS

The program may recognize top-performing trade allies participating in the program as Pro Network Trade Allies based on program participation, project quality, application submission quality, industry training and customer and program feedback.

Pro Network trade allies may enjoy these enhanced network benefits:

BENEFITS	
Program Recognition	<ul style="list-style-type: none"> • Elevated Listings on the online Find a Trade Ally tool
Project Support	<ul style="list-style-type: none"> • May receive exemptions from some project inspections.
Marketing Support	<ul style="list-style-type: none"> • Online training and resources. • Listed on the Find-a-Trade-Ally search tool. • Custom marketing requests. • Use of the Pro Network logo. • Customized cobranded program brochures, as requested. • Use of utility name in pre-approved program language – see the marketing guidelines for reference.

4.2 PRO NETWORK REQUIREMENTS

Trade allies must meet the following minimum prerequisites to be considered for Pro Network status:

1. Be an approved Wattsmart Business Trade Ally for a minimum of one year.
2. Have a local office within the state in which you are working.
3. Have completed five or more Wattsmart Business typical incentive projects year-to-date.
4. Be in the top 15% of participating trade allies within your state. Trade Allies are ranked and selected based on the following criteria.
 - Industry certifications
 - Accurate Submittals
 - Professional representation of the Wattsmart offering
 - Total number of projects submitted
 - Total kWh savings submitted
 - Use of industry leading technologies such as advanced network lighting controls (ANLC) or advanced rooftop controls (ARC)

All trade allies are evaluated quarterly based on program participation, project quality, application submission quality, industry training and customer and program feedback. The top-performing trade allies are then designated Pro Network trade allies and notified of their status annually.

SECTION 5 – BECOMING A TRADE ALLY

5.1 TRADE ALLY APPLICATION

To qualify for the Wattsmart Business Trade Ally Network, applicants must submit a completed and signed network Application and provide all requested documentation (collectively referred to as “Application”). Program Administrator, in coordination with the utility, will review the Application to determine if applicant meets the network participation requirements network participation requirements, and if approved, in Program Administrator’s and utility’s judgment and discretion, provide applicant a written approval notice.

Applicant agrees to provide Program Administrator and the utility with any information requested to process its application. Once approved, the Wattsmart Business Trade Ally is responsible for notifying Program Administrator of any changes or additions to the initial application when the changes occur either by updating its account through the trade ally portal or by notifying the program in writing at wattsmart@evergreen.energy.

The Wattsmart Business Trade Ally is responsible for all required network documentation annually. Participation in the network does not guarantee that a Wattsmart Business trade will receive any customer referrals or imply any guaranteed minimum level of work.

5.2 HOW TO APPLY

1. Review, become familiar with, and abide by the details in the Network Requirements, **Wattsmart Business Trade Ally Application Agreement and Terms and Conditions**.
2. Submit a Wattsmart Business network application [network application](#) for review and approval.

SECTION 6 – WATTSMART BUSINESS PROGRAM & PROCEDURES

6.1 WATTSMART BUSINESS PROGRAM

This section provides an overview of the available Wattsmart Business incentives, eligibility requirements, and provides a description of the expected participation steps to complete customer projects within the Wattsmart Business program.

The Wattsmart Business program offers a variety of services and incentives designed to encourage Rocky Mountain Power customers to incorporate energy efficiency into their businesses.

- The program is available to qualifying non-residential facilities receiving electric service from Rocky Mountain Power on a qualifying rate schedule as listed in Section 6.3.
- Incentives may be available for qualifying equipment that increases electric energy efficiency. Customers should contact the program or a Wattsmart Business Trade Ally before purchasing equipment to see if incentives may be available for equipment installed as part of retrofit, major renovation, or new construction projects.
- Incentives are paid directly to qualifying customers following the installation of qualifying equipment and approval by Rocky Mountain Power. Qualifying customers include building owners and electricity users whose projects are completed at an eligible business customer facility that receives electric service from Rocky Mountain Power on a qualifying rate schedule. Incentives may be assigned to a third- party, such as a trade ally, designated by the eligible participant when the appropriate payment release form is completed.
- Available incentives and requirements differ by state. Click below to see what incentive options may be available in

each state served by Rocky Mountain Power.

- [Utah](#)
- [Idaho](#)
- [Wyoming](#)

6.2 HANDLING INQUIRIES

Trade allies must respond to all inquiries from Rocky Mountain Power, program staff, and Wattsmart Business Trade Ally Network customers within two (2) business days. Inquiries may include responding to program staff project submission questions and documentation requests, answering customer questions, or scheduling inspections of a customer's facility where work has been performed related to a requested incentive.

6.3 VERIFYING ELIGIBILITY

Trade allies are responsible for verifying that the project site, applicant, project, and equipment are eligible for incentives. The definitions below explain who is eligible for energy efficiency incentives:

- **Energy Efficiency Incentive:** Payments of money made by the utility (Rocky Mountain Power) to the owner/customer for installation of an energy efficiency measure pursuant to an executed Incentive Offer Letter or approved application.
- **Customer:** Any party who has applied for, been accepted and receives service at the real property, or is the electricity user at the real property.
- **Owner:** The person who has both legal and beneficial title to the real property, is the mortgager under a duly recorded mortgage of real property, or the trustor under a duly recorded deed of trust.

6.3.1 VERIFYING CUSTOMER ELIGIBILITY ON ELECTRIC BILL

Customer eligibility can be verified by reviewing a copy of the customer's recent Rocky Mountain Power electric bill and confirming their receipt of electric service on a qualifying rate schedule as provided above. Figure 3 provides an example of where to find customer information including account number, facility address, rate schedule, and meter number on a typical Rocky Mountain Power customer bill.

Account Number

Meter Number

**Rate Schedule/
Facility Address**

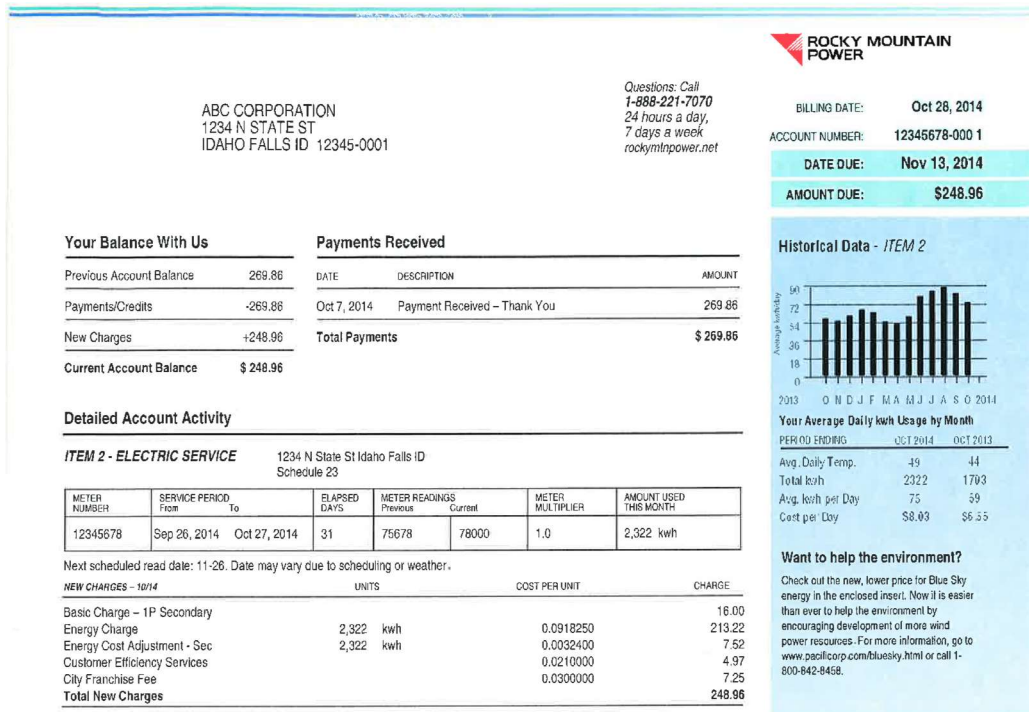


FIGURE 3-1: ROCKY MOUNTAIN POWER CUSTOMER BILL

Requesting a copy of the customer’s recent Rocky Mountain Power bill is the quickest and easiest way to determine customer eligibility. In the event that a customer bill is unavailable, for example with new construction projects, trade allies may contact their coordinator or call 385-300-0150 to obtain assistance confirming customer eligibility. Be prepared to provide the customer name, facility address where the equipment will be installed, and account and/or meter number if available.

6.3.2 VERIFYING ELIGIBLE RATE SCHEDULES

Eligible project sites include both existing and new construction commercial, industrial, and agricultural facilities within the states of Utah, Idaho, and/or Wyoming. In order to be eligible, the facility must receive electrical service from Rocky Mountain Power on one of the eligible electric service rate schedules. Click on the appropriate state tariff below to find rates schedule lists.

- [Idaho Schedule 140](#)
- Utah Non-residential rate schedules listed on [Schedule 193](#) per [Schedule 140](#)
- [Wyoming Non-residential Schedules](#) listed under DSM Balancing Account Category 2 and Category 3 per the 3-Year DSM Plan

6.3.3 VERIFYING EQUIPMENT ELIGIBILITY

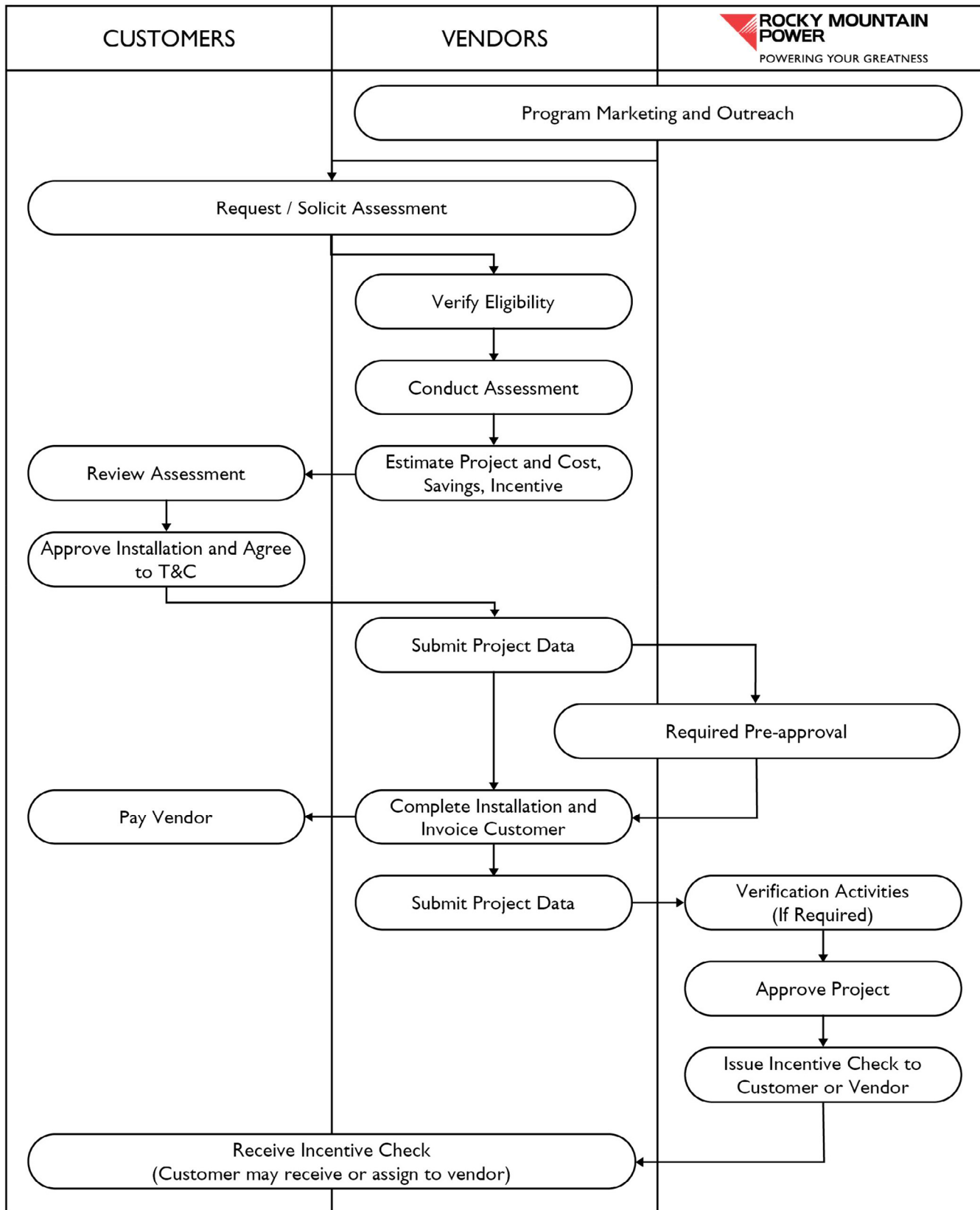
Minimum equipment efficiency requirements have been developed for high-efficiency Lighting, HVAC, Motors and Variable Frequency Drives, Building Envelope, Food Service, Appliances and other measure categories. This information can be found by going to the program website: www.Wattsmart.com.

6.4 CUSTOMER PARTICIPATION PROCESS

This section provides an overview of the trade ally’s role in assisting the customer to receive incentives for qualifying

equipment under the Wattsmart Business program. Incentive assignment is an option, but customers may choose to receive incentives directly.

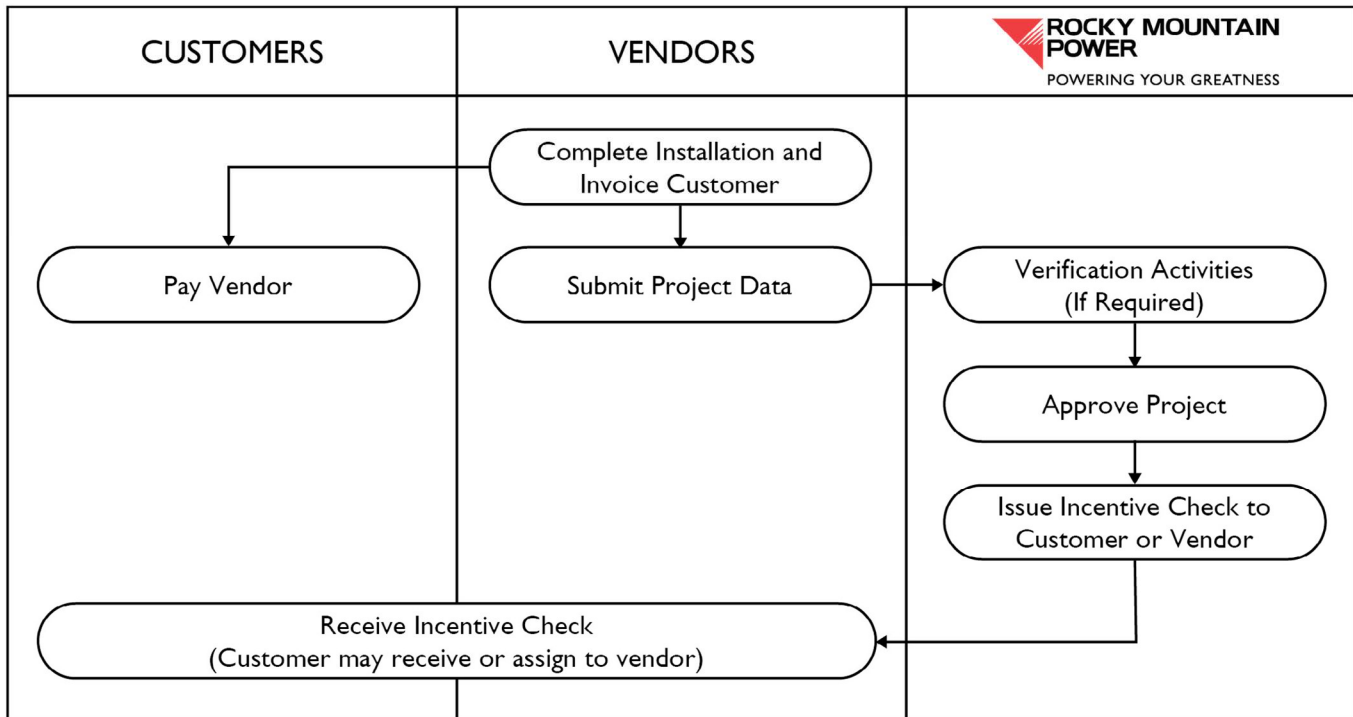
FIGURE 3-2 WATTSMART BUSINESS TRADE ALLY PRE-PURCHASE INCENTIVE PROCESS



Incentive Process for Lighting & Custom Measures

FIGURE 3-3 WATTSMART BUSINESS TRADE ALLY POST-PURCHASE INCENTIVE PROCESS

Incentive Process All Other Typical Measures: (except lighting and custom measures as noted above)



6.5 PROJECT CHANGES

During the course of a construction project, there are often changes and complications that arise. Make sure to notify Coordinator immediately of any changes that materially alter the implementation schedule, the measure or equipment costs, or the project’s estimated kWh savings. Failure to do so may result in the rejection of project or a lower than anticipated incentive.

6.6 PROJECT SUBMISSION FOLLOW-UP

The program will confirm receipt of trade ally submission. It is the trade ally’s responsibility to follow-up with the program to confirm receipt if correspondence is not received.

6.7 PROJECT INSPECTION POLICY

All projects are subject to inspection. Inspection staff will verify that a project has been completed, and that the equipment installed aligns with the information submitted on the incentive application. If errors and discrepancies are found, trade allies may be required to fix errors before an incentive is paid.

Please note that if a project is inspected, both trade allies and customers will need to be available for questions and inspection support. Site visits may be required, where inspectors will be looking at a variety of items as a part of the inspection process. This process may also include verification of items like invoice amounts, equipment installation totals and hours of operation.

SECTION 7 – TRADE ALLY QUESTIONS, CONCERNS, AND ESCALATIONS

Trade allies may have questions that are not specifically answered in this handbook or the Network Requirements or Agreement. The following is a high-level guideline to follow when seeking additional program support:

1. **Work with your outreach coordinator**
 - a. Contact your outreach coordinator to discuss questions and concerns relating to the Wattsmart Business program. This can be via phone, in person, or via email. Your outreach coordinator can route your inquiry to the appropriate channel and facilitate a response to you in three to four (3-4) business days.
2. **Contact the outreach supervisor in writing:**
 - a. If further clarification is needed, you may provide a written statement of your concerns to be escalated to an outreach supervisor. You can send this to your outreach coordinator directly, or, you may email wattsmart@evergreen.energy to be routed to the appropriate supervisor. You will be provided a written response by the program within three (3) business days.
3. **Request a meeting with the utility:**
 - a. Some questions involving topics beyond the scope of the Wattsmart Business Trade Ally Network may necessitate input directly from the utility. If questions remain after working with the outreach coordinator and supervisor and receiving a written response, you can elevate your concerns by emailing your coordinator or wattsmart@evergreen.energy and requesting a meeting with the utility.
4. **Written notice to the utility:**
 - a. You may further concerns with the utility by providing written notice to wattsmart@evergreen.energy. You will be provided a written response by the utility. If there are any legal disputes with the administrator or company, then it will go to arbitration.

SECTION 8 – LIGHTING PROJECT REQUIREMENTS & BEST PRACTICES

8.1 HOURS OF OPERATION BEST PRACTICES

This section describes how to ensure the accurate reflection of lighting usage patterns in the lighting calculator of the lighting project for which they are submitted.

On-site Considerations

1. Posted business hours should not be assumed to represent the actual lighting usage patterns. Confirm business hours
2. with the customer representative.
3. Facilities rarely have a single lighting usage schedule for the entire building. Facility occupant(s) with knowledge of the lighting patterns, such as facility, office managers or business owners should be interviewed. Here's a list of sample questions to ask a customer:
 - a. Do you have different space types with differing lighting usage patterns?
 - b. What controls your lights?
 - i. Manual switches?
 - ii. Occupancy sensors?
 - iii. Time clocks? Schedule?
 - c. When do lights typically turn on/off?
 - i. Does this differ depending on:
 1. Day?

2. Weekend?
3. Season?
- ii. Does this include after-hours activities (janitorial, other)?
4. The following common space types typically have differing lighting usage patterns:
 - a. Restrooms
 - b. Storage rooms
 - c. Vaults
 - d. Cold storages
 - e. Hotel/motel guest rooms
 - f. 24-hour facilities

Holidays and annual weeks of operation differ by business

Lighting Calculator Tool Considerations

1. Spaces within the facility with differing lighting usage patterns should each have a separately defined operating schedule.
2. Fixtures need to be assigned to the correct operating schedules as defined in the lighting tool.
3. For facilities with differing lighting usage patterns depending on seasonal schedule, make sure to define the seasonal schedule using the seasonal schedule tab in the lighting tool and assign the applicable fixtures.

8.2 LIGHTING DESIGN LAYOUTS

Wattsmart Business trade allies who participate in the typical lighting program are evaluated on the quality of their projects. One criterion to evaluate project quality is whether a lighting design layout has been submitted with the lighting tool and application when obtaining project pre-approval. Consideration of lighting design is an indicator of a quality lighting project. A well-designed lighting layout can distribute light well, separate task lighting from ambient lighting and provide good controllability to meet the unique needs of a Wattsmart Business customer.

8.3 QUALIFIED LIGHTING EQUIPMENT POLICY

Lighting equipment must meet qualifying criteria as outlined in the Lighting Catalog for all projects with a valid incentive offer, or lighting incentive application.

8.4 LIGHTING INSPECTIONS

Note that operating hours, and the resulting energy savings calculations, are subject to inspection for verification and adjustment, if necessary. The Coordinator may use lighting loggers to verify hours of operation at a customer's facility.

SECTION 9 – MARKETING GUIDELINES

9.1 MARKETING GUIDELINES AND STANDARDS

Trade allies on the trade ally [website](#).

Rocky Mountain Power provides trade allies with the opportunity to promote the sale and installation of energy efficiency. Trade allies promote the availability of incentives from the Wattsmart Business program to customers who wish to upgrade their building or equipment. Guidelines and requirements for marketing the program can be found on the trade ally [website](#).

For additional questions regarding logos, fonts and appropriate styles, contact your coordinator.

SECTION 10 – TRADE ALLY AGREEMENT, TERMS AND CONDITIONS

10.1 TRADE ALLY APPLICATION AGREEMENT, TERMS AND CONDITIONS

Text

SECTION 11 – RESOURCES

11.1 HELPFUL LINKS

- Program Website: <https://www.rockymountainpower.net/savings-energy-choices/business.html>
- Trade Ally Network Website: wattsmartbusiness.com
- [Find a Trade Ally Search Tool](#)

11.2

Text

11.2 SAMPLE INVOICE



1234 ABC Street

INVOICE

Somewhere, UT 84101
Phone: 800-XXX-XXXX
Fax: 800-XXX-XXXX
Website: info@xxx.com

DATE	3/8/2017
INVOICE #	[123456]
CUSTOMER ID	[123]
DUE DATE	4/7/2017

BILL TO

Salt Lake City Rec Center 123 Main Street
Salt Lake City, UT 84102 800-XXX-XXXX

DESCRIPTION	AMOUNT
<i>Materials</i>	
Product A - 300	\$5,000.00
Product B - 200	\$4,500.00
Product C - 100	\$3,500.00
<i>Labor</i>	
Other chargers - lift equipment	\$7,095.00
Non-program costs	\$150.00
Replace bad wiring, cosmetic fixes/upgrades, cleaning	\$2,000.00
	<i>Subtotal</i>
	\$22,245.00
OTHER COMMENTS	<i>Tax rate</i>
	7.000%
1. Total payment due in 30 - 35 days	<i>Tax due</i>
2. Please include the invoice number on your check	\$1,557.15
	Less Rocky Mountain Power Wattsmart Business Incentive
	\$(11,597.63)
	TOTAL
	\$12,204.52
	Make all checks payable to Crossed Wires Electric
Equipment Warranty from Invoice Date 3 years - fluorescent lamps 5 years - fluorescent fixtures 5 years - LED fixtures and lamps/ drivers 5 years - electronic ballasts 5 years - occupancy sensors	If you have any questions about this invoice, please contact Crossed Wires Electric Thank You For Your Business!