



Business Energy Solutions 2024 Program Application

Existing Facilities, Custom and New Construction Information & Agreement

Application Process

1. Submit a Pre-approval Application.
2. Receive a reservation notification.
3. Meet project specifications and program guidelines.
4. Complete the applicable measure worksheets.
5. Submit a completed and signed Final Application with all documentation and measure worksheets within 60 days of the project completion.
6. Receive your incentive check within 6 weeks of Final Application approval.

FOR MORE INFORMATION OR TO SEE IF YOU ARE ELIGIBLE

Call us at **1-866-540-4315** or email us at
UniSourcebes@franklinenergy.com

Franklin Energy is a UniSource Energy Services authorized contractor responsible for implementing this program through December 31, 2024.

The Business Energy Solutions Program (Program) is approved by the Arizona Corporation Commission and implemented by UniSource Energy Services (UniSource). UniSource in turn contracts with Franklin Energy to administer the Program. The Program is funded by UniSource customers as a part of their utility rates. Program funds, including any funds utilized for rebates or incentives, will be allocated on a first-come, first-served basis until such funds are no longer available. This Program may be modified or terminated without prior notice. Customers who choose to participate in this Program are not obligated to purchase any goods or services offered by Franklin Energy or any other third party. The selection, purchase, and ownership of goods and/or services are the sole responsibility of customer. UniSource makes no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods or services selected by customer. UniSource does not endorse, qualify, or guarantee the work of Franklin Energy or any other third party. Eligibility requirements apply; see the Program conditions for details.

Application Process

Follow the steps below to submit an application.

1. A Pre-approval Application is required prior to the start of work on all projects. Customers can choose from a prescriptive list of measures with set incentives or submit a custom project proposal with incentives based on kWh savings achieved.
2. Project funding is reserved for pre-approved projects.
3. Install equipment according to the terms and conditions described for the eligible measures. Ensure the measures meet all requirements detailed in the corresponding measure worksheet under the specifications section and in the Policies & Procedures.
4. Submit the Final Application with all required documentation within 60 days of project completion. Application shall include manufacturer's specification sheets for equipment installed, engineering calculations and architectural/engineering plans (where required), W9, lighting room count sheet (if 30 fixtures or more), copies of all invoices and receipts, which detail the specific equipment purchases, the services provided and other costs. Any final applications submitted more than 60 days after construction completion will be deemed ineligible for payment.

The location and business name on the invoice must be consistent with the application information. The project invoice must provide sufficient detail to separate the cost of the measures from the cost for other services such as repairs and building code compliance. In cases where the contractor will receive the incentive payment directly, the submitted invoices must include the full cost of and not simply show the portion of the project cost that the UniSource customer will pay.

5. UniSource and its representatives reserve the right to request additional supporting documentation as deemed necessary to ensure measure eligibility and verify that the expected energy savings will occur. All project-specific customer information will be held in confidence. Requested information may include: HVAC sizing calculation, equipment purchase dates, installation dates, proof that the equipment is operational, manufacturer specifications, warranty information, and proof of customer co-payment. Final applications must be submitted less than 60 days from the provided project completion date that is no later than December 1 of the same program year or from the reservation expiration date, whichever is earlier.
6. The final project documentation will be reviewed for eligibility and completeness. Applicants who submit incomplete applications will be notified of deficiencies within three (3) business days. Applicants with incomplete applications lose their place in the review process until all requested information is received. Applicants will have ten (10) business days to respond from the date of notice to provide the requested information in full or the application will be canceled. Incentives cannot be processed for payment until the complete application and all required documentation is received and approved.
7. Final, complete applications must be submitted by December 15.
8. Projects for which applications have been received in 2024 must be completed within the program year; applications for projects that are not completed within the year will be canceled.
9. Incentives will be paid within four to six weeks after the final application is approved.

Terms and Conditions

UniSource Energy Services (UniSource) is offering incentives under the Business Energy Solutions program to promote energy efficiency improvements. The program is funded by UniSource customers and is approved by the Arizona Corporation Commission (ACC). Franklin Energy implements this program on behalf of UniSource.

UniSource makes no representations and provides no express or implied warranty or guarantee with respect to design, manufacture, construction, safety performance or effectiveness of newly installed equipment or installation contractors, including any warranties of merchantability or fitness. Customers are responsible for disposing of equipment and materials according to federal, state and local code requirements. UniSource reserves the right to make changes to the Business Energy Solutions program without prior notice.

ELIGIBILITY

Final application and all required supporting documentation must be submitted within 60 days of project completion. The energy savings from installed measures must occur on a meter with an eligible rate schedule. The measures included in this program are not designed to promote fuel-switching. Equipment must be purchased for existing facilities. Eligible pricing plans include:

PRICING PLAN DESCRIPTIONS	RATE CODES
Large General Service Time-of-Use	EGLGST
Large Power Service Time-of-Use	EILPST
Large Power Service Time-of-Use High Voltage	EILPSTHV
Traffic Signal and Street Lighting Service	EPTSL
Water Pumping Service	EGGSWP
Lighting Service	EGLTG

PRICING PLAN DESCRIPTIONS	RATE CODES
Small General Service	EGSGS, EGSGSD
Small General Service Time-of-Use	EGSGST, EGSGSDT
Medium General Service	EGMGS, EGMGSC
Medium General Service Time-of-Use	EGMGST, EGMGSC
Mobile Home Park Electric Services (Common Areas)	EGGSMHP-F
Large General Service	EGLGS

INCENTIVE CAPS

The total incentive paid cannot exceed the incremental cost thresholds approved by the ACC.

If the customer intends to apply for local, state or federal tax credits, the estimated amount of those credits must be disclosed on the application agreement form. The Arizona Corporation Commission may require UniSource to deduct the value of your tax incentive when calculating your maximum rebate. The incremental cost of the measure may be reduced by these anticipated credits prior to applying the applicable custom cap cost.

The total incentive paid for a project at a single premise cannot exceed 20% of the total assigned Commercial & Industrial incentive budget.

PRE-APPROVAL APPLICATION

All projects and those projects with a \$10,000 incentive or more are required to submit a Pre-approval Application to reserve funds; de-lamping projects require a Pre-approval Application and pre-inspection. Funds will be reserved for 90 days unless an applicant requests, and is granted, an extension. Custom projects must pass the Arizona Corporation Commission-mandated Societal Cost Test (SCT). Project costs, incremental equipment costs, energy savings and equipment lifespans are all factored into the SCT. Projects that do not pass the SCT are not eligible for a rebate.

FINAL APPLICATION

A complete final application package with all supporting documentation should be submitted within 60 days of project completion. Project documentation includes copies of all itemized, paid invoices, W9, lighting room count sheet (if 30 fixtures or more), receipts detailing the specific equipment purchased, the services provided, and other costs. Any final applications submitted more than 60 days following construction completion will be deemed ineligible for payment. Customer responses to all final application requests for additional information by UniSource or Franklin Energy must be completed within 10 business days of request or the project will be ineligible for payment.

INSPECTIONS

Program staff reserves the right to inspect all projects to verify compliance with the program rules and verify the accuracy of project documentation. This may include pre-installation and/or post-installation inspections, detailed lighting layout descriptions, metering, data collection, interviews and utility bill data analyses. The customer must allow access to records and installation sites for a period of three years after receipt of incentive payment.

TAX LIABILITY

Incentives are taxable. If incentives exceed \$600 and you have indicated "Other" as your tax status, Franklin Energy may report your incentive as income to you on IRS Form 1099.

Business Energy Solutions Program

Application Form



Application Information

Application Type Pre-Approval Final Application

Submission Date

Project Completion Date

Building Type

Building Sq Ft.

HVAC Type

Building Permit Number (optional)

Project Type Custom Lighting HVAC Motors and Fans Refrigeration New Construction Other Measures

CUSTOMER INFORMATION

Legal Name (as shown on the UniSource customer's W9)

Project Name

UniSource Account Number

UniSource Account Name

Contact Name

Contact Title

Phone

Ext.

Contact Email

Installation Address

City

State

ZIP

Taxpayer ID

W-9 Tax Status

TRADE ALLY INFORMATION

Company Name

Contact Name

Title of Contact

Mailing Address

City

State

ZIP

Phone

Ext.

Contact Email

Taxpayer ID

W-9 Tax Status

REBATE CHECK INFORMATION

Issue Rebate Check to Customer (as listed above) Trade Ally (as listed above) Third Party (list below)

Name of Third Party receiving check

Name of Third Party Contact Person

Mailing Address

City

State

ZIP

Phone

Ext.

Contact Email

Taxpayer ID

-

W-9 Tax Status

DESIGN TEAM

Architect Firm

Contact Name

Phone

Mechanical Engineer

Contact Name

Phone

Electrical Engineer

Contact Name

Phone

Application Agreement

As an eligible UniSource Energy Services (UniSource) customer, I have attached documentation establishing proof of payment for the items installed according to this application. I agree to verification by the utility or their representatives of both sales transactions and equipment installation.

I certify that the information on this application is true and correct, and that the Taxpayer ID Number is representative of the applicant and that UniSource, UNS Energy Corporation and Franklin Energy are not responsible for any taxes that may be imposed on my business as a result of receipt of this incentive. I understand that incentive payments assume related energy benefits over a period of five years or for the life of the product, whichever is less.

I agree that if: (1) I do not install the related product(s) identified in my application, or (2) I remove the related product(s) identified in my application before a period of five years or the end of the product life, whichever is less, then I shall refund a prorated amount of incentive funds to UniSource on the actual period of time in which the related product(s) were not installed and operating (or the full amount if the product was never installed). This is necessary to assure that the project's related energy benefits will be achieved.

I understand that the program may be modified or terminated without prior notice. The program has a limited budget. Applications will be processed on a first-come, first-served basis until allocated funds are spent. I understand that the Final Application and all required documentation should be received by UniSource within 60 days of project completion. All equipment must be purchased and installed prior to submitting the Final Application. I also understand that all materials removed must be disposed of properly and taken out of service. All work shall be performed in accordance with all applicable professional standards and comply with all applicable federal, state, and local laws, ordinances, codes and regulations.

In no case will UniSource pay more than the approved thresholds of the incremental measure costs. I will disclose below if I intend to apply for local, state or federal tax credits and understand that the incremental measure cost will be reduced by these anticipated credits prior to applying the applicable cap. I understand that UniSource or its representatives have the right to ask for additional information. The UniSource Business Energy Solutions program will make the final determination of incentive levels for this project.

In return for the payment by UniSource under the Business Energy Solutions program, I understand that any energy efficiency credits and all resultant associated environmental credits from the energy efficiency measures for which the rebate is paid, are assigned to UniSource and/or UNS Energy Corporation. I understand that my company may be recognized as a program participant in promotional materials; however, project details will not be released without prior consent. If I choose to opt-out of any recognition, I will indicate my choice in a written letter. I acknowledge and agree that I may voluntarily provide the personal information required to complete this application agreement and associated documents. UniSource uses this information to fulfill the purpose for which it was obtained. I can obtain more information regarding the categories of personal information UniSource collects and the purposes for which such information will be used in UniSource's Privacy Policy located at <https://www.uesaz.com/privacy/>.

I have read and understand the program requirements, measure specifications, Terms and Conditions and policies and procedures and agree to abide by those requirements. Furthermore, I concur that I must meet all eligibility criteria in order to be paid under this program.

Customer Initials: _____

Trade Ally or Third Party Initials (if applicable): _____

The Arizona Corporation Commission may require UniSource to deduct the value of your tax incentive when calculating your maximum rebate.

Please indicate if your business intends to file for tax incentives associated with this application: Yes No

If you answered "Yes," please indicate the amount of tax incentive your business will receive: _____

APPLICATION SIGNATURES

Customer Signature

Project Completion Date

Trade Ally or Third Party Signature
(Required if receiving check)

Print Name

Project Cost

Print Name

Date

Total Incentive Requested
(From incentive worksheet)

Customer Signature
(Required if requesting check to be issued to Trade Ally or Third Party listed on page 4)