

Program Rebate Application

Instructions:

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.
2. To set up an optional Home Energy House Call, contact a Santee Cooper Energy Advisor at:
 Phone: (843)347-3399 ext. 3910 (Horry and Georgetown Counties)
 and (843)761-8000 ext. 3910 (Berkeley County)
 Email: residential.energy@santeecooper.com.
3. All necessary documents and information must be submitted no later than **November 30, 2023**.

Step 1

Customer Information

Customer Name (as it appears on Santee Cooper bill)	Last 4 Digits of Customer 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	
Installing Contractor			
Year Home was Built	Home Square Footage	Number of Heat Pumps in Home	

Step 2

Home Information

Please reference the online Program Manual for details regarding program participation and eligibility requirements.

The number of Electric and/or Non-Electric is REQUIRED for each appliance.

Appliance	Number of Electric	Number of Non-Electric
Water Heater		
HVAC Equipment (Heating)		

**Additional verification may be required*

Step 3

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.” Please reference the Program Manual for all eligibility requirements.

- Single Family – non-stacked residences, dedicated HVAC / water heating (Detached, Duplexes, and Townhomes)
- Multi-Family – stacked residences, dedicated HVAC / water heating systems (Apartments and Condominiums)

Energy-Efficiency Upgrades	Dwelling Type	Unit Type	Quantity of Units	Rebate Rate	Rebate Amount (\$)
Variable Speed Mini/Multi-Split HP¹ Before 1/1/2023 ⁵ : ≥ 16.1 SEER, ≥ 9.2 HSPF After 1/1/2023 ⁵ : ≥ 15.3 SEER2, ≥ 7.8 HSPF2	Single Family Multi-Family	Tonnage	x	\$80 Per ½ ton	=
Variable Speed Mini/Multi-Split HP¹ Before 1/1/2023 ⁵ : ≥ 19.3 SEER, ≥ 10.3 HSPF After 1/1/2023 ⁵ : ≥ 18.4 SEER2, ≥ 8.7 HSPF2	Single Family Multi-Family	Tonnage	x	\$160 Per ½ ton	=
Single Phase Heat Pump¹ (Before 1/1/2023⁵) Split System: ≥ 16.1 SEER, ≥ 9.2 HSPF Packaged System: ≥ 15.0 SEER, ≥ 8.2 HSPF	Single Family Multi-Family	# of Systems	x	\$300 Per System	=
Single Phase Heat Pump¹ (After 1/1/2023⁵) Split System: ≥ 15.3 SEER2, ≥ 7.8 HSPF2 Packaged System: ≥ 14.4 SEER2, ≥ 6.9 HSPF2	Single Family Multi-Family	# of Systems	x	\$300 Per System	=
Single Phase Heat Pump¹ (Before 1/1/2023⁵) Split System: ≥ 17.2 SEER, ≥ 9.7 HSPF Packaged System: ≥ 16.0 SEER, ≥ 8.2 HSPF	Single Family Multi-Family	# of Systems	x	\$400 Per System	=
Single Phase Heat Pump¹ (After 1/1/2023⁵) Split System: ≥ 16.3 SEER2, ≥ 8.2 HSPF2 Packaged System: ≥ 15.3 SEER2, ≥ 6.9 HSPF2	Single Family Multi-Family	# of Systems	x	\$400 Per System	=
Geothermal Heat Pump (ENERGY STAR [®] Qualified) ¹	Single Family Multi-Family	# of Systems	x	\$600 Per System	=
Hybrid Heat Pump (≥15 SEER, ≥ 8.5 HSPF) ¹	Single Family Multi-Family	# of Systems	x	\$500 Per System	=
Hybrid Heat Pump (≥17 SEER, ≥ 9.0 HSPF) ¹	Single Family Multi-Family	# of Systems	x	\$700 Per System	=
Whole Home Duct Replacement²	Single Family Multi-Family	# of Systems	x	\$500 Per System	=
Smart Thermostat³	Single Family	# of Systems	x	\$50 Per System	=
	Multi Family	# of Systems	x	\$30 Per System	=
Heat Pump Water Heater⁴	Single Family Multi-Family	# of Systems	x	\$400 Per System	=
Heat Pump Pool Water Heater¹	Single Family Multi-Family	# of Systems	x	\$225 Per System	=
Dual Speed Pool Pump¹	Single Family Multi-Family	# of Systems	x	\$100 Per System	=
Variable Speed Pool Pump¹	Single Family Multi-Family	# of Systems	x	\$275 Per System	=
ENERGY STAR[®] Refrigerator¹	Single Family Multi-Family	# of Units	x	\$30 Per Unit	=
ENERGY STAR[®] Clothes Washer¹	Single Family Multi-Family	# of Units	x	\$20 Per Units	=
Total Application Rebate					\$

¹Maximum of two (2) rebates per residence. (Refrigerator size must be greater than or equal to 7.75 cu ft)

²Maximum of two (2) rebates per residence. Trade Ally must also complete and submit the 2023 SEEH Duct Replacement Form.

³Maximum of two (2) rebates per residence.

⁴Maximum of two (2) rebates per residence. Trade Ally must also complete and submit the 2023 SEEH Heat Pump Water Heater Form.

⁵Manufacture date of equipment. AHRI definition of SEER/HSPF changed for equipment manufactured on or after January 1st, 2023.

Step 4 – Required Documentation

Variable Speed Mini-Split Heat Pumps or Variable Speed Multi-Split Heat Pumps

1. Completed Rebate Application form
2. Mini split/Multi-split AHRI certificate
3. Detailed Invoice
4. Equipment Manufacturer Warranty Installation form

Single Phase, Geothermal, and Hybrid Heat Pumps

1. Completed Rebate Application form
2. Heat Pump's AHRI certificate
3. Detailed Invoice
4. Equipment Manufacturer Warranty Installation form

Whole Home Duct Replacement

1. Completed Rebate Application form
2. Completed Duct Improvement Form to include Blower Door test or Duct Blaster test showing the pre- and the post-CFM leakage values

Smart Thermostat (see page 6 for a list of eligible thermostats)

1. Completed Rebate Application form
2. Picture(s) of installed Smart Thermostat(s)
3. Proof of purchase (Receipt must be dated between December 1, 2022 and November 30, 2023)

Heat Pump Water Heater

1. Completed Rebate Application Form
2. Heat Pump Water Heater Installation Form
3. Heat Pump Water Heater's AHRI Certificate
4. Picture(s) of installed Heat Pump Water Heater(s)
5. Proof of purchase (Receipt must be dated between December 1, 2022 and November 30, 2023)

Heat Pump Pool Water Heater

1. Completed Rebate Application Form
2. Heat Pump Pool Water Heater's AHRI Certificate
3. Picture(s) of installed Heat Pump Pool Heater(s)
4. Proof of purchase (Receipt must be dated between December 1, 2022 and November 30, 2023)

Dual and Variable Speed Pool Pump

1. Completed Rebate Application Form
2. Picture(s) of installed Pool Pump Motor(s)
3. Proof of purchase (Receipt must be dated between December 1, 2022 and November 30, 2023)

ENERGY STAR® Refrigerator and Clothes Washer

1. Completed Rebate Application Form
2. Picture(s) of installed ENERGY STAR® Appliance(s)
3. Proof of purchase (Receipt must be dated between December 1, 2022 and November 30, 2023)

If the application is for ENERGY STAR® Refrigerators or Clothes Washers, please provide:

Appliance	Manufacturer	Model Number	Serial Number
Refrigerator #1			
Refrigerator #2			
Clothes Washer #1			
Clothes Washer #2			

If the application is for Smart Thermostats, please provide:

Appliance	Manufacturer	Model Number	Serial Number
Smart Thermostat #1			
Smart Thermostat #2			

Step 5 Terms and Conditions

Santee Cooper is implementing a Smart Energy Existing Homes program ("Program") to provide qualifying Customers ("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.

Santee Cooper has contracted with and authorized Resource Innovations, Inc. ("Resource Innovations") to assist with this Program as needed to include, but not limited to the following activities: facilitating project information requests from Customers and Trade Allies and offering technical support to Santee Cooper 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 and Smart Thermostats. Contractors installing heat pump water heaters must have a South Carolina Plumbing Contractor's License. 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 www.santeecooper.com/ResidentialTradeAlly.

Program Funding. The 2023 Program Year runs from December 1, 2022 to November 30, 2023. 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 use a Trade Ally to purchase and complete the installation of qualifying measures offered by the Program, with the exception of Heat Pump Water Heaters and Smart Thermostats
2. Customer must complete and submit the Rebate Application and all required documentation (collectively the "Rebate Application") within 30 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 2023 Program year must submit the Rebate Application and required documentation by November 30, 2023, 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 the *Rebate Estimator* table of this Rebate Application and in the Program Manual. Rebate payments are one-time only. 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 and will be mailed within two to three weeks after the final approval of the customer's rebate application. 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 he/she 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 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 he/she 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 Resource Innovations and Trade Allies, and any other third party, as applicable, 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 Resource Innovations 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. Santee Cooper shall be entitled to rely upon said documentation and certification and shall have no duty to independently verify that the Trade Ally meets all program requirements.

Fraud. Customer represents and warrants that he/she 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 RESOURCE INNOVATIONS DO NOT MAKE ANY WARRANTIES, AND BOTH SANTEE COOPER AND RESOURCE INNOVATIONS 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 RESOURCE INNOVATIONS 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.

Responsibility for delivery and workmanship related to any materials or equipment that participant procures under the rebate program exclusively rests with participant, contractor or other third party. Neither Santee Cooper nor Resource Innovations assumes any responsibility for the representations, warranties or guarantees with respect to the quality, design, manufacture, construction, safety, performance, installation, or effectiveness of the equipment or oversight of contractor services utilized by participant. Neither Santee Cooper nor Resource Innovations guarantees that installation and operation of the equipment will result in reduced energy usage or cost savings.

Limitation of Liability. Notwithstanding anything in these Terms and Conditions and to the fullest extent allowed by law, Santee Cooper, Resource Innovations 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, Resource Innovations 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, Resource Innovations 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.

Indemnification. Participant will indemnify and hold harmless Santee Cooper and its affiliates, subsidiaries, joint ventures, officers, directors, employees, agents (including Resource Innovations), successors, and assigns (collectively the "Indemnified Parties") from and against all liability

claims and demands, including any damages, losses, liabilities or expenses (including without limitation court costs and reasonable attorneys' fees) which arise as a result of the Participant's action or inaction which relates in any way to this Rebate Program, including the submission of fraudulent rebates. Notwithstanding the foregoing, this indemnification is in addition to any indemnity and/or insurance obligations between the Participant and the Indemnified Parties.

IN NO EVENT SHALL THE INDEMNIFIED PARTIES BE LIABLE TO PARTICIPANT FOR ANY CONSEQUENTIAL, INCIDENTAL, PUNITIVE, OR DIRECT DAMAGES, INCLUDING LOST PROFITS, ARISING FROM OR OTHERWISE IN CONNECTION WITH THIS REBATE PROGRAM.

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. Trade Ally 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, Resource Innovations 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 Resource Innovations 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 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.
2. The information provided to Santee Cooper 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.
3. I have used a licensed contractor, as appropriate per Rebate Program requirements, and have complied with applicable permitting requirements for applicable installations.

Authorized by (please print)

Signature of Authorized

Date

Send Completed Form to:

Mail: Santee Cooper Energy Support Services
305A Gardner Lacy Rd
Myrtle Beach, SC 29579

Email: residential.energy@santeecooper.com

Please enter in email subject line – **SECURE: Rebate Application**

Santee Cooper Prequalified Smart Thermostat List – V1.2023 – FEB2023

Please check the Santee Cooper website at www.santeecooper.com/thermostats to see the most up-to-date prequalified smart thermostat list.

Manufacturer	Thermostat	Model Number
Amazon	Amazon Smart Thermostat	S8ED3R
Bryant	HouseWise	T6-WEM01-A
Cielo	Cielo Breez Eco	Cielo Breez Eco
	Cielo Breez Plus	Cielo Breez Plus
Ecobee	Ecobee 3 Lite with Separate Motion Sensors	SG_B07K2GTKQ5_US
		EB-STATE3LTVP-01
	Ecobee3 Lite Pro	EB-STATE3LTBR-01
	Ecobee Premium	Premium
	Ecobee Enhanced	Enhanced
	Ecobee 4	EB-STATE4-01
	SmartThermostat with Voice Control	EB-STATE5-01
Emerson	Sensi Touch / Sensi Wi-Fi	ST75W ST75
		ST75S ST55
	Sensi™ smart thermostat	1F87U-42WF ST75SU
		1F95U-42WF 1F95U-42WFS
Greenlite	Airz	Airz
Honeywell	The Round Smart Thermostat-2 nd Generation	RCH9310WF
	T5 Smart Thermostat	RCHT8610WF2006
	T8 Pro Smart Thermostat Multi-Stage 2 Heat/2 Cool	TH6220WF2006/U
	T8 Pro Smart Thermostat Multi-Stage 3 Heat/2 Cool	TH6320WF2003/U
	T9 (with or without sensor)	RCHT9610WFSW2003/U
	T10	THX321WFS2001W
Lennox	iComfort E30	ICOMFORT E30
	iComfort M30	ICOMFORT M30
Lux	Kono Smart Wi-Fi Thermostat	KN-S-MG1-B04
	CS1	CS1
	GEO	GEO (WH, BL)
Momentum	Meri Smart-Learning	MO-STAT01
Nest	Learning Thermostat	Any Model Number
theSimple	The Simple Thermostat	Simple S100 B
Sensibo	Sensibo Sky AC Controller	Sensibo Sky
	Sensibo Air Pro AC Controller	Sensibo Air Pro
	Sensibo Air AC Controller	Sensibo Air
Venstar Inc	Explorer Mini (residential)	T2100
	Explorer IAQ	T3950_IAQ
Wyze	Programmable Smart Wi-Fi Thermostat	Programmable Smart Wi-Fi Thermostat