

# **Instant Lighting Incentive Program Participating Contractor Handbook**

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## Definitions

**Customer:** The end-use commercial customer, or an agent who works on behalf of the end-use commercial customer.

**Incentive:** The dollar amount Con Edison will reimburse participants for qualified sales submitted through the Program, determined by product measure and sales date.

**Instant Lighting Incentive Program (ILIP, or Program):** The branded name of the Con Edison midstream point of purchase program.

**Minimum Customer Contribution (MCC):** The minimum allowable amount that Participating Contractors must charge customers per unit for each sale. Products are never to be given away for free.

**Minimum Customer Discount (MCD):** The minimum mandatory incentive amount that Participating Contractors must provide to customers per unit for each sale. (Previously known as Incentive Pass-Through.)

**Participating Contractor (Participant, or PC):** An approved organization registered in the Program.

**Participation Agreement (PA):** The contract each Participating Contractor must sign to state they agree to adhere to the Program rules and regulations.

**Sales Date:** Date that the product is delivered to, or in possession of, the customer.

## **Program Overview**

In support of New York’s clean energy goals, the Instant Lighting Incentive Program is the primary channel for instant incentives on commercial LED lamps. The Con Edison Program Team advances the clean energy mission through this Program by embracing direct partnerships with our Participants and prioritizing a streamlined incentive process.

**What:** The Instant Lighting Incentive Program (ILIP) provides point of purchase discounts on qualified commercial measures when purchased through a Participating Contractor.

**Why:** To benefit Participating Contractors and their customers by making LED upgrades affordable. The Program stimulates increased sales for Participating Contractors, while reducing material, installation, and operating costs for their customers.

**Who:** Con Edison commercial and multi-family customers are eligible to receive incentives. Participating Contractors deliver these incentives to customers at the point of sale.

**How:** Participating Contractors submit their qualified sales in the Con Edison ILIP Portal for reimbursement.

## ***Program Contacts***

**Charles Tannous**

*Program Manager*

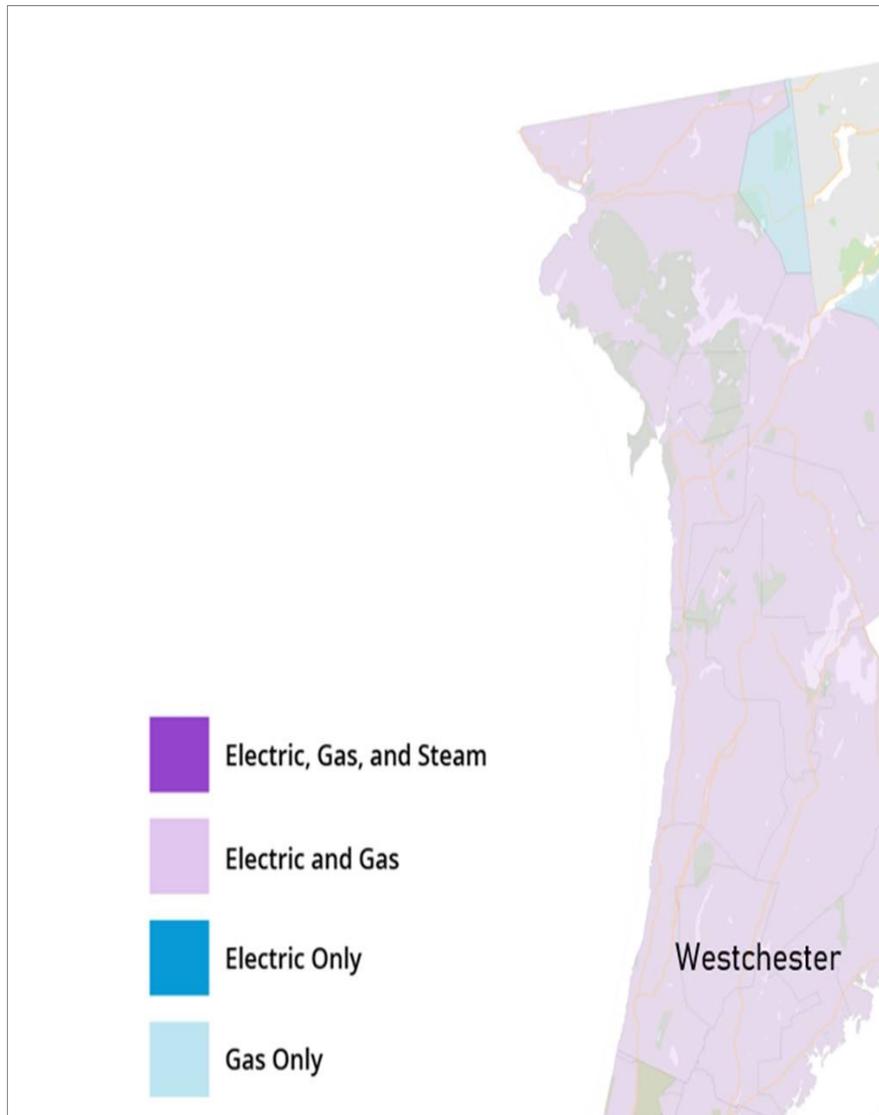
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## ***Eligible Customer Base***

Con Edison Program territory map:



Most commercial and multifamily customers in the Con Edison Program territory are eligible for the incentives.

## ***Eligible Measures***

The following measures are eligible to receive incentives through the Program (updated Sept 2020):

- All ENERGY STAR listed screw-in or pin-based lamps.
- All DesignLights Consortium (DLC) listed TLED's, and CFL & HID replacement lamps.

For specific measures and the latest incentive rates, refer to [coned.com/InstantLighting](https://coned.com/InstantLighting).

## Becoming a Participant

### ***Contractor Eligibility***

To be considered eligible, contractors must fulfill the following requirements:

- Completed at least two years of business.
  - Exceptions made for applicants with less than 2 years of business if they can provide proof of existing project(s) consisting of products that would sum to at least \$1000 of incentives if submitted to ILIP.
- Purchase directly from a lighting manufacturer or their rep agency, or be a lighting manufacturer making direct sales.
- Have and maintain liability insurance coverage of at least \$1 million.
- Maintains good standing with other Con Edison programs, if currently or previously enrolled

### ***Enrollment***

Eligible contractors may apply to enroll in the Program:

1. Submit the enrollment form, found at [coned.com/InstantLighting](http://coned.com/InstantLighting). Some requested items include:
  - a. Organization definition
  - b. Reference checks
  - c. Certificate of Insurance
2. The Program Team will advise if the initial enrollment form has been accepted or rejected.
  - a. If rejected, the applicant may resubmit after six months from the original application.
3. If accepted, the applicant must:
  - a. Sign the Participation Agreement, which outlines the Program terms and conditions

### ***Training***

Contractors are required to complete the training by Con Edison within 30 days of their enrollment acceptance. If contractors do not complete the training within 30 days, their pending Participant status will be denied.

A minimum of one employee of the contractor who will be engaging with the program must partake in the training. If the trained member leaves the participating organization, Participating Contractors must inform the Con Edison Program Team, and another member of the contractor must complete the training. Additional training may be provided at the request of participants or for participants who are in danger of falling out of good standing.

The training consists of a thorough review of all items in this handbook. On behalf of their employer, the trained members must understand the entirety of the handbook, including the consequences of non-compliance with the handbook.

If members of the contractor have questions or concerns at any time, they should immediately contact a member of the Con Edison Program Team. Failure to comply with the program structure as laid out in this handbook may result in reimbursement denial and/or suspension from the Program.

Participants may begin to sell measures for reimbursement upon successful completion of training. Sales made prior to the date of training will be ineligible for reimbursement.

Participants must provide financial information within 15 business days of training completion. The information must be submitted and approved *prior to submission* for reimbursement

- For ACH:
  - Latest version of W9 available on IRS website
  - A bank letter on letterhead with supplier name, remittance address, and banking details; or a voided check with routing and account numbers
  - Completed ACH Payment Authorization Form
- For check:
  - Latest version of W9 available on IRS website
  - An invoice with supplier name and remittance address; or a letter on company letterhead with supplier name and remittance address signed by an officer of the company

## Portal Registration

Participating Contractors must have a user profile to gain access to the online Portal. Up to two members per Participating Contractor may have user profiles with dashboard access containing insight into their organization's performance, in addition to submission access. The remaining members (up to ten) may have profiles with submission access.

## Earning Incentives

Following the completion of the enrollment, training, and registration processes, applicants are officially considered Participating Contractors and will be listed as such on Con Edison's website. At this point, the contractors are permitted to earn incentives through the Program.

### ***Validation of Sale***

**Customer Validation:** Participating Contractors must confirm customer eligibility prior to every sale.

Please note: If a customer is purchasing products for multiple locations, the eligibility of each individual location must be verified. When submitting the sales in the Portal, they must be separated by location.

1. Log into the Portal with your approved user credentials
2. Select "Customer Validation" tab
  - a. Or, if you've recently searched for the customer, select "Recently Viewed Customers"
3. Search by Customer Name, Account Number, Service Address, or Mailing Address
4. Select "View Details" for the customer

## 5. Record Confirmation Code

Please note: Customers may not be eligible if there is a current or previous project with measures similar to those of ILIP in the Con Edison system for these customers (including in Multifamily, Small Business, C&I programs, etc.). When a Participant searches for a customer with a current or previous project that has measures like those of ILIP, the Portal will display a message telling the participant to contact the Program Team to determine eligibility.

**Product Validation:** Participating Contractors must confirm product eligibility prior to every sale.

1. Select “Product Validation” tab
  - a. Or, if you’ve recently searched for the product, select “Recently Viewed Products”
2. Use the search bar to enter part number
3. Select “View Details” for the product
4. Find the valid incentive amounts

### **Sales Requirements:**

- Charge MCC – Participating Contractors must charge customers a minimum of \$0.50 for each unit sold. Products are never to be given away for free.
- Provide MCD – Participating Contractors must provide customers a minimum discount of \$1.00 for each unit sold.
- Spares – No spares permitted for reimbursement.
- Each sale incentivized only once – If you purchase material from another Participating Contractor, only one organization may claim incentives on that sale.
- Unique sale – Sales are only eligible if the products have not and will not be used to receive incentives from another Con Edison program.
- Budget cap – Reimbursement is offered on a first come, first served basis. Con Edison reserves the right to issue budget caps and/or suspend incentives based on the availability of funding.

Please note: The participant will be reimbursed the incentive amount that is effective at the time of sale, not at the time of installation or submission.

## **Submission**

### **Submission Requirements:**

- Submit within 90 days of sale – Sales must be submitted within 90 days after the sales date. If sales are not submitted within the 90-day timeframe, the project may be denied for reimbursement, unless an exception was made by the program team.
- Submit upon installation – After the participant confirms that the installation is complete and the project fulfills all program requirements, they should submit the sale within the Portal as soon as possible.
- Submit any day of the week – Sales will be accepted by the Portal any day of the week.
- Remain active – Participants are expected to remain active by requesting *at least* \$5000 of approved incentives every 6 months. Failure to remain active is subject to actions up to suspension from the Program.

- Appropriate customer contact – Participants are prohibited from listing members of their own organization as the customer or purchaser contact on a sales submission. Listing members of your own organization may result in a delayed or denied incentive reimbursement.

**Sales and Invoicing Submission:** Once the installation is complete, the participant will record sales information and submit for reimbursement. A template will be provided for the invoice to Con Edison. Invoices to Con Edison must match sales details exactly, or they will need to be resubmitted. Invoices should be for the full incentive amount of each measure sold.

1. Select the “Submit Sales” tab
2. Sales can be submitted as single or multiple sales
  - a. Single Sales- manually enter all required fields
  - b. Multiple Sales-complete excel spreadsheet with all required fields and upload
    - i. Note: Multiple Sales spreadsheet accepts up to 100 lines of sale per upload
3. A successful submission will automatically prompt the participant to attach associated invoices
  - a. Attach the customer invoice(s) and itemized invoice to Con Edison
  - b. Submit invoices in one of the following formats: Word, csv, excel, pdf
  - c. Note: Payment will not be processed unless invoices are submitted
4. If you need to submit the invoice later, select the “Invoice Attachments” tab

**Reimbursement Schedule:** Invoices will be processed by Con Edison on a weekly basis. For jobs that are inspected prior to reimbursement, Con Edison will make every effort to issue payments within 30 days of a passing inspection.

**Partner Goals:** Partner goals may be established for enrolled Participants. Check with the Program Team for details.

## Assuring Quality

### *Inspections*

**Post-Inspections:** All sales submitted for reimbursement are subject to post-inspection.

- Copy of customer invoice must be submitted by the customer upon inspection.
- Customer must grant access to the Con Edison Program Team for verification purposes.
- All information for the inspection must be provided by the customer, not by the participant. If needed, the participant should assist the inspections teams with reaching the customer.
- During inspections, the Program Team will verify: customer installation address, product category, unit count, invoice amount of incentivized product, and discount noted on invoice, among other items.
- Completed inspections will yield one of the following results:
  - **Pass-** Inspection determines 100% of material submitted matches reported sales and has been installed in accordance with this handbook.

- **Partial Pass**- Inspection determines <100% of material submitted matches reported sales and/or has been installed in accordance with this handbook.
- **Fail**- Inspection cannot be completed, or inspection determines none of material submitted matches reported sales and/or has been installed in accordance with this handbook.

All projects are subject to post-inspection prior to reimbursement. In these cases, payments will be issued once the project passes inspection.

Customer or participant refusal to cooperate with requests for post-inspection will result in a failed inspection, and the reimbursement funds will be denied. If a customer does not respond to the inspector within 30 days of the initial outreach attempt, then the program team will consider this non-response to be a refusal to cooperate with the inspection. Before failing the inspection due to a customer's lack of response, the program team will make one request to the participant to facilitate the communication between the inspector and customer and/or provide updated customer contact info to complete inspection.

**Re-Inspections:** A Participant can request one re-inspection if all of the following conditions are true:

- The missing incentives are greater than or equal to \$1,000.
- The project will be complete within 30 days of initial inspection.
  - a. In some cases, exceptions to this requirement may be made by the program team.
- The customer permits the re-inspection.

**Minimum 95% installation rate** – Participating Contractors must maintain a rolling average of 95% installation rate or above.

- If the Participant's installation rate falls below 95%, they will be prohibited from claiming reimbursement on new sales until they increase their installation rate to 95% or greater via sales returns or re-inspections.
- Participants are expected to process all returns in the Portal. Multiple failures to maintain a 95% installation rate may result in actions up to and including suspension from the Program (see *ILIP Code of Conduct* for details).

**Program Evaluation:** With advance notice to the customer, following completion of the project and in order to provide Con Edison with an opportunity to review the operation of the energy-efficiency measures for program evaluation purposes, the customer must agree to cooperate with any effort by Con Edison or its contractors and subcontractors, to make or to have made follow-up visits to customer facilities, and the customer shall provide building energy system data, supporting documentation, and otherwise cooperate fully in support of this effort.

## **Returns**

**Returns and Reconciliations:** All returns (including those to rectify incorrect data submitted on a sales submission) must be recorded and reconciled in the Portal.

Returns are processed in the same way as sales (see *Sales and Invoicing Submission* section), with the quantity values recorded as negative. Except for the quantity field, all other fields should match the fields in the associated sales submission.

After processing a return, Participating Contractors may have a negative balance.

Refund outstanding incentives – If outstanding incentives exceed \$5,000, the Participant must refund the incentives back to Con Edison within 30 days of notice. Until the Participating Contractor refunds all of the outstanding incentives, the Participant will be prohibited from claiming reimbursement on new sales. This restriction will be effective on the day that the Participant is notified of their outstanding incentives, until the situation is resolved.

- If the participant chooses to leave the program or is suspended from the program, they are required to refund *all* outstanding incentives.

## ***Compliance***

Participating Contractors are expected to comply with all sections of this handbook and the *Participation Agreement*. Participating Contractors that do not comply with the rules and regulations of ILIP may be subject to a warning, probationary period, or suspension from the Program.

Participating Contractors are subject to review at the discretion of the Program Team.

### **Participant Statuses:**

- **Introductory:** Participant is new to the program, having submitted their first ILIP sale within the last 3 months.
- **Probationary:** Defined in *Participation Agreement*.
- **Suspended:** Defined in *Participation Agreement*, not eligible for reinstatement for 12 months.
- **In Good Standing:** Participant is compliant with all Program rules in this handbook and the *Participation Agreement* and does not fit into any other status.

## **Maintaining Communication**

Participants are encouraged and expected to maintain open communication with the Program Team. If they have any feedback, concerns, or questions regarding the Program, they should reach out to one of the Program Team members.

Participants must return Program Team communications in a timely manner (within 2 business days).

## ***Change Management***

At Con Edison discretion, the Program may change temporarily or permanently. Participants should make the necessary adjustments to update internal systems, train staff, and order product as applicable. The most recent version of the handbook is available at on the Portal.

### ***Participant/Con Edison Partnership***

**Documentation:** The Program Team reserves the right to request additional sales documentation at any time and for any reason from a Participating Contractor. Failure to produce documentation may result in disapproval of invoice, failed inspection, probation, and/or suspension from the Program.

**Marketing and Con Edison Logo Usage Guidelines:** All pieces containing co-branding must adhere to Con Edison's *Participating Contractor Badge Usage Guidelines*. They must be submitted to and approved by the Program Team prior to usage. Unauthorized use of co-branding may result in suspension of a Participating Contractor from the Program.

## Highlighted Program Rules

**Qualifying Sales:** Contractors must also be fully enrolled and trained in the Program before making their first sale. Prior to every sale, Participating Contractors must use the Portal to validate eligibility of both the customer and the product. Furthermore, sales are only eligible if the products have not and will not be used to receive incentives from another Con Edison program. No spares permitted for reimbursement. Pre-inspections are not required.

**Purchasing Material:** Participating Contractors may purchase qualified products from manufacturers, rep agencies, or distributors; however, each sale will be incentivized only once. If one Participant purchases from another Participant, only one organization can claim incentives on that sale.

**Minimum Customer Contribution (MCC):** The Program requires Participants charge customers a minimum of \$0.50 for each unit sold. Products are never to be given away for free.

**Minimum Customer Discount (MCD):** The Program requires Participants provide a minimum discount of \$1.00 for each unit sold.

**Participation:** Participants are expected to remain active by requesting *at least* \$5000 of approved incentives every 6 months. Failure to remain active is subject to actions up to suspension from the Program.

**Sales Submission and Invoices:** The Program requires all sales be submitted within 90 days after the sales date, and upon participant's confirmation that the installation is complete. If sales are not submitted within the 90-day timeframe, the project may be denied for reimbursement, unless an exception was made by the program team. Sales information is to be submitted via the Portal with the customer invoice and an itemized incentive invoice to Con Edison. Sales will be accepted on the Portal any day of the week. Invoices to Con Edison must match sales details exactly. Invoices should be for the full incentive amount of each measure sold.

**Post-Inspections:** All projects are subject to post-inspection prior to reimbursement. Projects selected for post-inspection will require a copy of customer invoice from the customer and access to the installation site. Refusal to cooperate with these requests, including a customer's lack of response within 30 days of the initial outreach attempt, will result in a failed inspection and the reimbursement funds will be denied. If a Participant's average installation rate falls below 95%, the Participant will be prohibited from claiming reimbursement on new sales until they increase their installation rate to 95% or greater via sales returns or re-inspections. Additionally, if a Participant's outstanding incentives exceed \$5,000, the Participant will be prohibited from claiming reimbursement on new sales until they refund all of the outstanding incentives.

**Communication:** Participants must return Program Team communications within 2 business days. The Program Team reserves the right to request additional sales documentation at any time and for any reason from a Participating Contractor. Failure to produce documentation may result in disapproval of invoice, failed inspection, probation, and/or suspension from the Program.

**Marketing and Con Edison Logo Usage Guidelines:** All pieces containing co-branding must adhere to Con Edison's *Participating Contractor Badge Usage Guidelines* and be approved by the Program Team prior to usage.