

# **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 of the purchase order.

## Program Overview

The Instant Lighting Incentive supports New York's clean energy goals by providing instant incentives on commercial LED lamps and 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:** The Program helps make LED upgrades affordable, which increases sales for Participating Contractors, while reducing material, installation, and operating costs for their customers.

**Who:** Con Edison commercial and multifamily customers are eligible for 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.

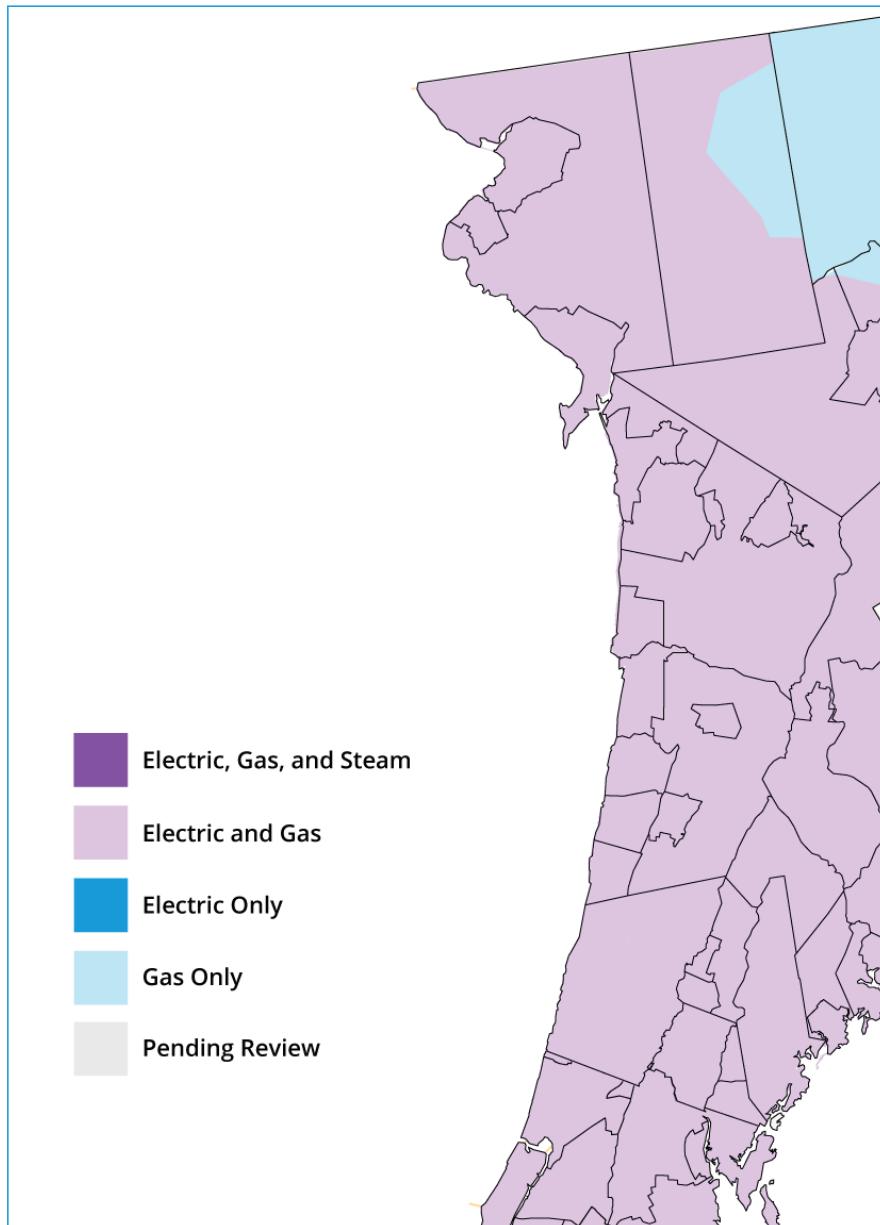
Approval from the Program is required for every fixture and retrofit kit sale.

## Program Contacts

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## Eligible Con Edison Program Territory Map



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

### Eligible Measures for Incentives

- All ENERGY STAR® listed screw-in or pin-based lamps.
- All DesignLights Consortium (DLC) listed TLEDs and CFL & HID replacement lamps.

For specific measures and the latest incentive rates, visit [conEd.com/InstantLighting](http://conEd.com/InstantLighting).

## Becoming a Participant

### Contractor Eligibility

To be considered eligible, contractors must:

- Have been in business at least two years.
  - Exceptions can be made for applicants with less than two years of business if they provide proof of existing project(s) with products totaling at least \$1000 in 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.
- Maintain good standing with other Con Edison programs, if currently or previously enrolled.

### Enrollment Process

1. Complete and 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. If rejected, the applicant may resubmit after six months from the original application.

3. Sign the Participation Agreement, which outlines the Program terms and conditions.

### Training

Contractors are required to complete Con Edison's training within 30 days of their Program acceptance, or their pending Participant status will be denied.

At least one of the contractor's employees 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 employee must complete the training. Additional training may be provided at the participant's request 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 and trained members must understand the entirety of the handbook, including the consequences of noncompliance with the handbook.

If Participants have questions or concerns at any time, they should immediately contact 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 check:
  - Latest version of Form W-9 available on the 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 can have a maximum of two user profiles with access to the portal dashboard that provides insight into their organization's performance, in addition to submission access. The remaining members (up to ten) may have profiles with submission access only.

## Earning Incentives

Once the enrollment, training, and registration process are complete, 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

Customers may not be eligible if they have a current or previous project with a Con Edison program with measures similar to ILIP. If they do, 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 qualified lamp sold, and \$2.00 for each qualified fixture and kit. Products are never to be given away for free.
- **Provide MCD** – Participating Contractors must provide customers a minimum discount of \$1.00 for each qualified lamp sold and \$2.00 for each qualified fixture and kit 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 funding availability.

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 Rules**

- **Submit within 90 days of sale** – Sales must be submitted within 90 days of the sales date, or the project may be denied for reimbursement, unless an exception was made by the Program Team.
- **Submit upon installation** – The participant should submit the sale within the portal as soon as the installation is complete and all program requirements have been fulfilled.
- **Submit any day of the week** – The portal accepts sales Monday-Sunday.
- **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 & Invoicing Submission:** Once the installation is complete, the participant will record sales information and submit for reimbursement. You will receive a Con Edison invoice template. 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 only be submitted as multiple sales
  - a. Complete Excel spreadsheet with all required fields and upload  
**Note:** Multiple Sales spreadsheet accepts up to 20 lines per sales 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. Invoices should be submitted in CSV format  
**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:** Con Edison will review invoices 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.

- Customer must submit a copy of their invoice 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 contacting the customer.
- During inspections, the Program Team will verify: customer installation address, product category, unit count, invoice amount of incentivized product, discount noted on invoice, and 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 a refusal to cooperate with the inspection. The Program Team will make one more request to the Participant to facilitate communication between the inspector and customer and/or provide updated customer contact info to complete inspection before failing the inspection due to the customer's lack of response.

**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:** In order to provide Con Edison with an opportunity to review the installed energy efficiency measures for program evaluation purposes, the customer will receive advance notice and agrees 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 provide building energy system data, supporting documentation, and otherwise cooperate fully in support of this effort.

## Returns

**Returns & 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**. All fields (except for the quantity field) 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. The Participant will be prohibited from claiming reimbursement on new sales until the outstanding incentives have been refunded. This restriction will be in effect from the day 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 one year.
- 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 contact the Program Team.

Participants must return Program Team communications within two business days.

## Change Management

At Con Edison's 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.

## Program Rules Summary

**Qualifying Sales:** Contractors must 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 qualified lamp sold and \$2.00 for each qualified fixture and kit 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 qualified lamp sold and \$2.00 for each qualified fixture and kit 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 of 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 and 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.