

Appendix E: Program Participation Guide

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Program Overview

Energy-efficient Commercial Food Service appliances can produce 10-50% energy savings without degrading production capacity or other usability criteria. Increased energy efficiency is typically the result of more sophisticated design; efficient appliances usually cost more, ranging from a \$140–\$400 difference for reach- in refrigerators and freezers to a \$1,000–\$3,000 difference for cooking equipment.

The AEP Texas Commercial Food Service Market Transformation Program (“AEP Texas CFS”, “AEP Texas CFS Program”, or “Program”) offers eligible customers midstream and downstream rebates to help offset the increased cost of efficient appliances. A sales performance incentive fund (SPIF) incentive is also provided to the Participating Supplier to promote the efficient option and handle all rebate paperwork.

During the purchase, Participating Suppliers will issue a rebate to eligible customers – writing off the cost of the rebate to the utility customer directly as a credit on their invoice. Participating Suppliers will then use an online portal to submit for rebate reimbursement from the Program, along with the SPIF paid directly to the Participating Supplier to cover the administrative burden.

Participating Customers and Authorized Customer Representatives are also eligible to receive rebates - providing the sales invoice and any other required documentation to Frontier Energy. Frontier will then use an online portal to submit for rebate reimbursement from the Program, paid directly to the Customer or Authorized Customer Representative.

Program Requirements

AEP Texas CFS Program Equipment Eligibility Requirements

The Program provides incentives for new commercial food service equipment contained within the AEP Texas CFS Qualified Products List (QPL). The QPL contains all categories and qualifying models that are eligible for rebates under the Program. The QPL is updated monthly. The current version of the QPL should always be consulted to determine questions of eligibility for the rebate program, with the definitive version located on the AEP Texas CFS Program website.

For the most up-to-date version of the QPL, please visit the AEP Texas Commercial Food Service Market Transformation Program website: [Qualifying Equipment - AEP Texas Commercial Food Service Program](#).

Customer Eligibility

Commercial Food Service (CFS) Customers (“Participating Customer, Customer, or End-User”) are eligible for rebates by purchasing eligible CFS equipment from a Participating Supplier, providing the sales invoice and any other required documentation via an Authorized Customer Representative, or providing the sales invoice and any other required documentation directly to Frontier Energy. Utility customers must be located within the service territory of AEP Texas. Locations eligible for rebates under this Program can be confirmed using the Customer Eligibility link on the AEP Texas CFS program website and the search function on the Texas Electric Service Identifier website to verify the address is in the AEP territory.

Additional customer eligibility requirements include:

- Equipment must be listed on the Qualified Product List (QPL).
- Eligible CFS equipment must be purchased from a Participating Supplier.
- Customer installation address(s) must have a commercial Utility account.
- Customers must not have opted out of an AEP Texas energy efficiency program.
- Customers must have a valid Tax Identification Number and W-9.
- The Customer agrees to program terms and conditions, including:
 - Providing feedback regarding the Program's influence on their purchase decisions.
 - Providing the required information as required in the Application Submission section of this guide.
 - Upon request, comply with the Inspection of Completed Sales procedure outlined in this guide.
 - Rebate eligibility for an appliance is limited to one approved application submission. Additional rebates or incentives provided by a related program are subject to the terms and conditions of that Program, the discretion of AEP Texas, and/or the Program Implementer (“Frontier”).
- Participating Authorized Customer Representatives must be authorized to conduct business in Texas and meet all requirements outlined in the Program Participation Agreement.

Participating Supplier Eligibility

Prospective AEP Texas CFS Participating Suppliers (“Supplier, Dealer, Manufacturer, or Participant”) must meet the eligibility requirements specified within. Upon approval by Frontier, the CFS Equipment dealer is considered an active Program Participant and authorized to submit

applications for rebate reimbursement.

Additional Supplier eligibility requirements include:

- Participating Suppliers must be authorized to conduct business in Texas and meet all requirements outlined in the Program Participation Agreement.
- Participating Suppliers must complete and submit the Program enrollment application provided by the Authorized Program Implementor.

Claims Submission & Processing Guidelines

Incentive Claim Terms & Payment

Each Incentive Claim submitted or submitted on behalf of a Participant shall be subject to the terms and conditions outlined in the Program Participation Agreement. Incentive Claims are accepted on a first-come, first-served basis until the Program Term ends or when allocated funds are exhausted. Applicants are assigned a first-come, first-served status according to the date and time their incentive claim is submitted through the P3 Database.

Sales Program Incentive Fund (SPIF) for CFS Equipment Dealers

Dealer SPIF amounts are listed in a "dealer version" of the QPL. SPIF amounts are designated within each equipment rebate category and are subject to change. For the most recent version of the Dealer SPIF QPL, please contact Frontier at foodservice-aeptx@frontierenergy.com.

Step 1: Claim Processing Information

1. Sign-in to the claim submission online portal at <https://aeptexas.p3.enertrek.com/>
2. All claims in the queue for the Program are listed here. A claim can flow through different statuses, per below:
 - **Created:** The claim record is entered but not submitted.
 - **Submitted:** The claim was submitted to Frontier Energy for review, pending a change to approved, denied, or requires corrections.
 - **QA Pending:** Pending a second review.
 - **Requires Corrections:** The claim has been returned to the Participant for corrections (or revisions).
 - **Approved:** Payment for the claim was approved.
 - **Paid/Completed:** The claim was approved and paid.
 - **Rejected:** This claim was denied and will not be paid.
3. Filter submitted claims by selecting "Submitted" under Status on the Project List table.

Step 2: Verify Claim Data and Supporting Documentation

It is a requirement to upload a copy of the Customer's invoice and, if applicable, a credit note to quality for the rebates. An invoice and credit note must list the following information and match the claim:

1. **Installation Site Information:** Address, City, State, ZIP Code, Easy ID Number, and Meter Number
 - Use the *Texas Easy ID* website - Address must be found and in the AEP territory and have an active Easy ID number.
 - The business name on the claim must match the install address business name.
 - The installation name on the claim and invoice must match.
 - For invoices that show multiple addresses (i.e. bill-to, ship-to, install, end-user) the installation address must be clearly indicated and match the claim address.
2. **Sale Information:** Invoice Number and Invoice/Sales Date
 - Claims must include the entire invoice number.
 - The invoice date on the claim and invoice must match.
 - Invoice numbers may include identifying markers, such as the salesperson's initials (sold equipment), or a business store number (location) as part of the invoice number on the claim.
3. **Rebate Line Item:** Rebate listed as a discounted line item, containing all the words:
 - Confirm the rebate line item appears on the invoice.
 - AEP Texas, Rebate (or Incentive). E.g. AEP Texas Rebate or AEP Texas Incentive.
2. **Equipment Information:** Manufacturer, Brand, Model Number, and Quantity
 - Equipment manufacturer, model number, rebate line item, and quantity – invoice must match the rebate data entered on the claim form.
 - Confirm the rebate line item appears on the invoice, per rebate instructions above.
 - Some participants may have a different model number noted or abbreviated model number in their sales system and on the invoice. Search the internet, contact the QPL team, or the Participant to see if there is an alternative model number belonging to the model number on the invoice.
 - Utilize the **Program QPL** to look up models and ensure the rebate amounts and model numbers match: [Qualifying Equipment - AEP Texas Commercial Food Service Program](#)

3. **Credit Note Information:**

- In cases where a Participant is unable to show the rebate as a line item, they must submit the invoice and a credit note showing the rebate. The Credit Note must meet the following requirements:
 - **Credit Note Designation:** Must be designated as "Credit", "Credit Note", or "Credit Memo".
 - **Credit Note Number:** Must be unique and easily identifiable.
 - **Credit Note Date:** Must list the date issued.
 - **Installation Site Data:** Business name, Address, City, State, and ZIP Code must match what is listed on the invoice.
 - **Invoice Data:** Exact Invoice Number and Customer Number must be referenced on the credit note.
 - **Equipment Data:** Brand, Model Number, and Quantity must match what is listed on the invoice.
 - **Rebate Line Item:** Rebate listed as a discounted line item showing credit has been applied to the eligible piece/s of equipment, containing all the words: AEP Texas (or TX), and Rebate (or Incentive). E.g. AEP Texas Rebate or AEP Texas Incentive.

Any unclear or mismatched data will require the claim to enter the Requires Corrections status. An email will be sent to the participant, requesting they update the invoice and/or claim with the correct information.

Acceptable Errors

1. **Installation Address**

- Using acronyms to designate street types: Blvd vs. Boulevard vs. BLVD.
- Additional zip code numbers: 90061 vs. 90061-3075
- Variances in how unit number is listed: Suite #A vs. #A vs. Suite A

2. **Equipment**

- The model number on the invoice is abbreviated or an alternative version to the model number on the claim.
- The claim may show a simplified model number, while the invoice shows a more complex one. However, the simplified model number on the claim and the complex model number on the invoice must have the same base numbers. Most of the time, this is acceptable.

Unacceptable Errors

Unacceptable errors usually require editing due to typographical errors or missing information that could make it difficult for inspectors or evaluators to locate the installation site. Here are some examples that would send a claim back for Requires Corrections.

1. Installation Address

- Claim lists a different address than installation address
- Incorrect, incomplete, or missing Street #
- Incorrect, incomplete, or missing street name and street designation (i.e. Rd, Blvd, Ave, etc.)
- Incorrect, incomplete, or missing Suite/Unit # for relevant addresses
- Incorrect, incomplete, or missing 5-digit-Zip Code

2. Claim Details

- Incorrect invoice number
- Incorrect invoice date

3. Equipment

- Incorrect Manufacturer
- Incorrect Model Number
- Incorrect Quantity
- The wrong rebate amount is listed on the invoice/claim

Claim Application Process

Verifying Customer Eligibility

1. If a rebate is offered to a customer, verify that the ESID/Meter for the installation address is eligible.
 - CIS Lookups will be performed automatically in the P3 Database
2. To ensure that your equipment complies with the most current QPL, please check the AEP Texas CFS website for a list of qualifying products.
3. Verify that the installation address is a commercial account. Food trucks are not acceptable.

Application Submission

1. Log in to the AEP Texas P3 Database,
<https://aeptexas.p3.enertrek.com/Users/Account/LogOn>
2. Click "+ New Project."

3. Select "AEP Texas Foodservice Equipment Rebates" in the New Project Modal.
4. Enter all required information in the corresponding fields:
 - ESID/Meter number Lookup, First and Last Name, Customer's email address (the person purchasing the equipment), and Business Name as listed for the address.
 - Restaurant Type, Building Type, and Sector Type of the business in which the equipment will be installed.
 - Estimated Install Date.
 - Agreement to participate in visual inspection to verify installed equipment meets program terms and answer questions about how rebates influenced their purchase.
 - Invoice number.
 - Invoice Date.
 - Project Type.
5. Upload the required documentation.
 - Sales invoice.
 - If the make & model are not listed on the *Qualified Products List*, documentation must be provided to verify minimum eligibility requirements are met for each piece of equipment submitted for a rebate.
6. Click "Submit".

Program Contact Information

The Program offers a website, hotline, and email inbox for equipment suppliers and other stakeholders to contact the program team.

- Website: [AEP Texas Commercial Food Service Program](#)
- Phone: 833-731-1843
- Email: foodservice-aeptx@frontierenergy.com