



Evergy Heating Cooling and Home Comfort Program

Selecting the Right Rebate Measure and Condition of Old Outdoor Unit



Introduction

Selecting the right rebate category, or measure, is critical for several reasons:

- Provides **accurate energy savings** that Evergy can claim over the old system
- Assures customers get the **correct incentive \$**
- Assures **accurate reporting** of whether old outdoor unit was Operating or Failed when replaced

The screenshot shows the Evergy online intake tool interface. At the top, there is a navigation bar with the Evergy logo and links for Home, Create, Applications, Documents, Help, Administration, and Your Account. The main heading is "WELCOME TO THE ONLINE INTAKE TOOL". Below this, there is a paragraph of instructions: "Use this site to submit customer rebate applications according to program eligibility requirements. To avoid delays in processing, please be sure to have the customer's invoice, equipment commissioning report, installation report for air infiltration and/or windows with invoice, AHRI certificate, and terms and conditions before beginning your application. Click the Help Center link if you require assistance submitting rebates." Below the instructions is a link for the "Trade Ally Portal". A horizontal bar below the text contains three sections: "Create New Application" with a plus icon, "In Progress" with a document icon, and "Submitted" with a document icon and a checkmark. On the right side, there is a "News & Announcements" section dated 5/7/2021, containing a notice about new Terms and Conditions available in Documents. Below that is a section titled "Operating vs. Failed Rebate Selections" with detailed instructions on how to choose between Early Retirement (Operating) or Failed based on the condition of the old outdoor unit.



Checklist and Terms

For many trade allies, the rebate application is entered by someone other than field or sales personnel, therefore:

- Good communication is essential in making sure that person knows the correct selection
- Use the Checklist and assure it is filled out accurately
- Be sure the Terms and Conditions has a “condition” box checked

Primary Heating Fuel Type and Equipment:

Natural Gas (including propane, wood, etc.): Furnace Boiler

Electricity: Air Source Heat Pump Ground Source Heat Pump Elect. Resist

Primary Water Heating Fuel Type: Natural Gas Electricity

Existing Cooling System Type: Central A/C Air Source Heat Pump Ground Source
 No A/C (can include window units)

Est. SEER Rating of Old Outdoor Unit: _____ Unit Model # (optional): _____

Condition of Old Outdoor Unit: Operating Failed

Rebate Reassignment

Reassignment: Send check to customer's billing address

CUSTOMER COMPLETION REQUIRED

If you are replacing an existing central air conditioning system or heat pump, the outdoor unit that is being replaced (please pick one):

Runs when the AC is turned on, even if it doesn't cool the home. Does not run at all when the AC is turned on

Account Number: _____ Email Address: _____

Signature: _____ Date: _____

By signing the Terms & Conditions you will automatically be enrolled in Evergy's email subscription.



Equipment/Measure List

The screenshot shows the Evergy web application interface. The top navigation bar includes 'Home', 'Create', 'Applications', 'Documents', 'Help', 'Administration', and 'Your Account'. The main content area is titled 'Project Name: aad' and 'Project Type: Evergy Energy Savings (EVERGYHVAC1_154006)'. Under the 'Improvements' section, there is a sub-section 'Add Heating & Cooling'. Below this, there is a 'Select Equipment Type:' label and a dropdown menu currently showing '-- Select --'. A red arrow points from the dropdown menu to the right, towards the 'Equipment List Drop Down Menu' table.

Changes were made to the drop down menu in the OIT's Improvements section to help simplify the selections.

Actual measures and rebate amounts did not change.

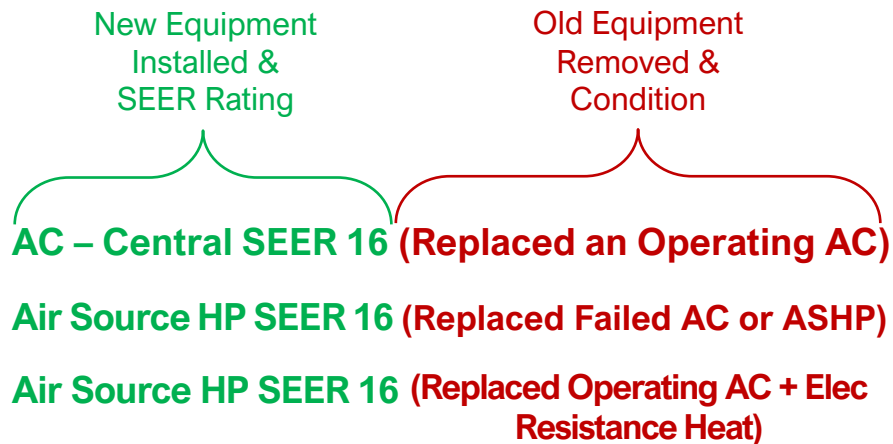
Equipment List Drop Down Menu
AC - Central SEER 15 (Replace An Operating AC)
AC - Central SEER 15 (Replace Failed AC)
AC - Central SEER 16 (Replace An Operating AC)
AC - Central SEER 16 (Replace Failed AC)
AC - Central SEER 17 (Replace An Operating AC)
AC - Central SEER 17 (Replace Failed AC)
Air Source HP SEER 15 (Replace Operating AC + Electric Resistance Heat)
Air Source HP SEER 15 (Replace An Operating AC or ASHP)
Air Source HP SEER 15 (Replace Failed AC + Electric Resistance Heat)
Air Source HP SEER 15 (Replace Failed AC or ASHP)
Air Source HP SEER 16 (Replace Operating AC + Electric Resistance Heat)
Air Source HP SEER 16 (Replace An Operating AC or ASHP)
Air Source HP SEER 16 (Replace Failed AC+ Electric Resistance Heat)
Air Source HP SEER 16 (Replace Failed AC or ASHP)
Air Source HP SEER 17 (Replace Operating AC + Electric Resistance Heat)
Air Source HP SEER 17 (Replace An Operating AC or ASHP)
Air Source HP SEER 17 (Replace Failed AC + Electric Resistance Heat)
Air Source HP SEER 17 (Replace Failed AC or ASHP)
Ductless Mini-Split (Replace An Operating or New Add to any system)
Ductless Mini-Split (Replace Failed Mini-Split)
Ground Source HP (Replace An Operating ASHP or AC + Elec Resis. Heat)
Ground Source HP (Replace An Operating AC or ASHP)
Ground Source HP (Replace An Operating GSHP)
Ground Source HP (Replace Failed AC, GSHP, ASHP)
GSHP New Construction Addition



Understanding the Equipment/Measure List

The Equipment/Measure list shows all of the rebate options and each selection **identifies two different things**:

- The first part tells us what *new* equipment was installed and the SEER rating
- The second part tells us what *old* equipment was replaced *and* it's condition at that time





Equipment/Measure List – Elect. Resistance Heat

Heat pump options also each have a category that includes a reference to **Electric Resistance Heat**:

- If the old equipment you replaced is a heat pump, the heat pump is considered the primary source of heat, NOT the kW strips in the air handler
- So these categories **ONLY** apply when the **NEW** equipment is a heat pump and you replaced a standard air conditioner with the primary source of heat for the home being electric resistance

Air Source HP SEER 15 (Replace Operating AC + Electric Resistance Heat)
Air Source HP SEER 15 (Replace An Operating AC or ASHP)
Air Source HP SEER 15 (Replace Failed AC + Electric Resistance Heat)
Air Source HP SEER 15 (Replace Failed AC or ASHP)
Air Source HP SEER 16 (Replace Operating AC + Electric Resistance Heat)
Air Source HP SEER 16 (Replace An Operating AC or ASHP)
Air Source HP SEER 16 (Replace Failed AC+ Electric Resistance Heat)
Air Source HP SEER 16 (Replace Failed AC or ASHP)
Air Source HP SEER 17 (Replace Operating AC + Electric Resistance Heat)
Air Source HP SEER 17 (Replace An Operating AC or ASHP)
Air Source HP SEER 17 (Replace Failed AC + Electric Resistance Heat)
Air Source HP SEER 17 (Replace Failed AC or ASHP)
Ductless Mini-Split (Replace An Operating or New Add to any system)
Ductless Mini-Split (Replace Failed Mini-Split)
Ground Source HP (Replace An Operating ASHP or AC + Elec Resis. Heat)



Understanding Operating vs Failed

Incentives for Failed and Operating **are the same**, but we **must still report condition** of the **old outdoor unit** and approximate year it was installed

- **Operating**

- ✓ Compressor motor still comes on
- ✓ Equipment **min. 5 years old**
- ✓ Nameplate SEER rating **no greater than 12**
- ✓ If greater than 12, or newer than 5 years old, **submit under “Failed”**

- **Failed**

- ✓ Compressor motor does not operate
- ✓ No min. age or max. SEER requirement on old outdoor unit





Summary

In conclusion:

- Operating and Failed refer **ONLY** to the outdoor unit
- The **Checklist Operating/Failed** selection should *match* the box checked on the **Terms and Conditions**
- Terms doc should **match the drop-down selection** in the OIT – application is **Flawed** if they do not match
- Examples at right for *illustrative purposes only* – there should only be one checkmark on each form
 - If you installed two systems and one was Operating and one was Failed, write a note on the form or invoice

Primary Heating Fuel Type and Equipment:
 Natural Gas (including propane, wood, etc.): Furnace Boiler
 Electricity: Air Source Heat Pump Ground Source Heat Pump Elect. Resist

Primary Water Heating Fuel Type: Natural Gas Electricity

Existing Cooling System Type: Central A/C Air Source Heat Pump Ground Source
 No A/C (can include window units)

Est. SEER Rating of Old Outdoor Unit: 15 16 17 18

Condition of Old Outdoor Unit: Operating Failed

Unit Model # (optional): _____

Rebate Reassignment
Assignment: Send check to customer's billing address

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CUSTOMER COMPLETION REQUIRED

I am replacing an existing central air conditioning system or heat pump. I am replacing an existing unit that is being replaced (please pick one).
 I am replacing the A/C, even if it doesn't cool the home. I am not replacing the A/C, even if it doesn't cool the home.

Account Number: _____ Email Address: _____
 Signature: _____ Date: _____

By signing the Terms & Conditions you will automatically be enrolled in Evergy's email subscription.

AC - Central SEER 15 (Replace An Operating AC)	✓	✓
AC - Central SEER 15 (Replace Failed AC)		✓
AC - Central SEER 16 (Replace An Operating AC)	✓	
AC - Central SEER 16 (Replace Failed AC)		✓
AC - Central SEER 17 (Replace An Operating AC)	✓	
AC - Central SEER 17 (Replace Failed AC)		✓
Air Source HP SEER 15 (Replace Operating AC + Electric Resistance Heat)		
Air Source HP SEER 15 (Replace An Operating AC or ASHP)		
Air Source HP SEER 15 (Replace Failed AC + Electric Resistance Heat)		
Air Source HP SEER 15 (Replace Failed AC or ASHP)		
Air Source HP SEER 16 (Replace Operating AC + Electric Resistance Heat)		
Air Source HP SEER 16 (Replace An Operating AC or ASHP)		
Air Source HP SEER 16 (Replace Failed AC+ Electric Resistance Heat)		
Air Source HP SEER 16 (Replace Failed AC or ASHP)		
Air Source HP SEER 17 (Replace Operating AC + Electric Resistance Heat)		
Air Source HP SEER 17 (Replace An Operating AC or ASHP)		
Air Source HP SEER 17 (Replace Failed AC + Electric Resistance Heat)		
Air Source HP SEER 17 (Replace Failed AC or ASHP)		



Questions? Just Ask...



Your Outreach Specialist
is a valuable resource
and welcomes your
questions at any time!

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Thank you!

