

# OG&E A/C Tune-up Program Manual

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## Program Description

The OG&E portfolio of home and commercial energy efficiency programs (HEEP and CEEP) includes considerable energy-saving opportunities to OG&E's residential and commercial customers. The A/C Tune-up program primarily focuses on improving the energy efficiency of customer's HVAC systems. It does this by training participating Trade Allies on A/C Tune-up best practices and how to apply them.

The A/C Tune-up Program is designed to address market barriers that prevent customers from receiving high-performance A/C and heat pump tune-ups or system replacements. Energy savings are captured through identifying adjustments required in the HVAC system and correcting them.

### A/C Tune-up Key Concept

*Provide high-performance DX system A/C tune-ups*

## Program Objectives

The program focuses on training Trade Allies on industry best practices through use of the program toolkit, and applying these practices in the marketplace. To motivate the quick adoption of these practices, the program's focus, requirements and incentives are as follows:

- Achieve cost-effective and significant electricity savings through the use of local HVAC contractors
- Transform these markets over time by addressing the following market barriers:
  1. Lack of maintenance practices and replacement of low SEER/EER equipment
  2. Lack of easy access to qualified vendors to deliver these services
  3. Lack of awareness, benefits of properly tuned air conditioning systems
  4. Properly operating HVAC system energy efficiency by improving indoor cooling and humidity
- Develop a trained group of contractors capable of providing A/C Tune-up services in the market
- Provide educational and marketing support for customers and contractor to promote the implementation of energy efficiency measure

## Program Management & Contacts

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## Program Roles and Responsibilities

### Sponsor (Oklahoma Gas & Electric):

- Provide customer database, which allows implementer to verify the eligibility of participants
- Provide the implementer with the necessary incentive funds
- Oversee the Program Implementer (CLEAResult)

### Program Implementer (CLEAResult):

- Plan and design the program
- Market the program to customers and contractors
- Approve customer eligibility and enrollment
- Recruit, train and mentor Trade Allies
- Process qualifying coupons and rebates
- Maintain a database of all necessary program information
- Quality control and quality assurance activities
- Assist contractor in procuring the program toolkit(s) access to reporting software

### Program Participant (Customer):

- Provide the program or Trade Ally with the necessary account information to determine participation and eligibility
- Choose a Trade Ally from the approved Contractor list to install eligible measures
- Allow CLEAResult to access the home or business to verify completed A/C Tune-ups and installed measures (where applicable)

### Trade Ally:

- Complete Trade Ally Agreement, acquire program toolkit and register for training
- Complete program required training and adhere to program guidelines outlined in the HEEP/CEEP Program Manual
- Respond to customer requests in a professional and timely manner
- Perform A/C Tune-up(s) at qualifying customer site(s) and submit appropriate documentation with each application
- Perform all work to the required standards of the program
- Provide qualifying customers with an instant discount for services rendered on Contractor's signed invoice

## Program Changes

The HEEP/CEEP program has evolved from previous years to include the following changes:

- Continued updates enhancements and streamlining of the A/C Tune-up measures and procedures allow for easier contractor implementation and participation.
- A/C Tune-ups are now cross-promoted with other energy savings programs channels in the HEEP and CEEP programs to increase participation in multiple energy efficiency programs by each participant.
- In 2018, the program technician can promote from an M&V (test-in/test-out) approach to a “Modeled,” or deemed savings approach in order to decrease the time required to perform a tune-up and allow contractors to increase the volume of Tune-ups performed. This also increases scheduling flexibility due to outdoor temperature limitations, since the test-in is not required.
- The incentive amount is applied by the contractor as an “instant discount” to the customer’s invoice for the A/C Tune-up service. The program will then reimburse the contractor for the discount, upon approval of the submitted documentation.
- For Program Year 2018, Commercial DX air conditioning systems above 26 tons, and up to and including 80 tons, can be qualified through the program, pending case-by-case approval by CLEAResult to ensure that the controls on the system will allow for a valid test-in and test-out under similar load conditions. All systems above 26 tons MUST be performed as full M&V (test-in and test-out).

## Program Eligibility

### Customer Eligibility

All residential and commercial customers of OG&E with HVAC systems, up to and including 25 tons in size, are eligible to receive incentives from the HEEP/CEEP programs. Systems between 26 and 80 tons MAY or MAY NOT be eligible, pending case-by case pre-approval by CLEAResult as long as funding is available. Accurate Pre- and Post-testing for capacity and efficiency can be performed on the system. Systems that have received an incentivized A/C Tune-up in the past five years are not eligible to receive A/C Tune-up incentives.

### Trade Ally Eligibility

Please see the Program Participation section at the end of this document for enrollment information and application. Contractors that meet all program qualifications and standards (listed below) are eligible to participate in the program. Trade Allies may continue as part of the program as long as they maintain compliance with all program requirements, achieve satisfactory customer satisfaction scores and pass quality control inspections and validations.

To participate, contractors must sign the Trade Ally Agreement at the end of this document and attend in-classroom, on-site and in-field training as required by program guidelines. Follow-up training and mentoring will be provided as needed to ensure contractor proficiency. Contractors will not be assigned a Technician Qualification number or included on the program’s website until they demonstrate proficiency in the skills required to be a contractor in the program and complete requirements. Details on the training, tools and performance are listed below:

- Technical Requirements:
  - Licensed HVAC contractors
  - EPA Refrigerant Handling Certification per each technician
  - Completion of program-required training(s)
  - Achievement of “Qualified Technician” status
- Business Requirements:
  - Demonstrate the capability to conduct business successfully by providing ONE of the following:
    - ✓ Satisfactory Dun and Bradstreet Rating
    - ✓ BBB rating
    - ✓ Three qualified business references
- Insurance coverage:
  - Maintain general liability insurance coverage of at least \$1 million and produce proof of current coverage with CLEARResult as an additional insured, using the corporate office address: 4301 Westbank Dr., Bldg. A, Suite 250 Austin, TX 78746.
- Tools:
  - Trade allies must own or purchase a required toolkit in order to perform A/C Tune-ups and replacements to program standards.
  - The purpose of the toolkit is to ensure uniform measurements, diagnostic procedures and verification of system performance.
  - The tool kit consists of:
    - 1 each: iManifold (900-M) or iConnect (900-C)
    - 2 each: Easy wrap line temperature probes (901-M)
    - 1 each: Wireless temperature/repeater probe (912-M)
    - 3 each: Wireless temperature/humidity probes (911-M)
    - 1 each: Set of 3x 5 ft. ball valve hoses (RYB) (955-MRS)
  - Additional tools that may be needed by the contractors’ tech are digital Vane Anemometer, qualified electric meter with clamp amp function and a qualified digital manometer.
  - A/C Tune-ups on multiple circuit systems require additional remote wireless temperature and pressure probes.
  - Program participation also requires (contact program manager or trainer prior to purchase to ensure version selected is program supported):
    - Apple iOS smart device (phone or tablet; 4<sup>th</sup> generation or newer)
    - Download and installation of free app
- Quality Performance
  - Trade Ally, upon request from CLEARResult, and at no additional cost to the customer, shall make reasonable repairs or corrections to work that the Trade Ally

has performed to bring such work up to the program standards. The repairs or corrections are to be completed within the time frame specified by CLEAResult. Trade Ally also agrees to take steps to ensure that future work will comply with the program standards.

## Program Incentives

### Measure and Incentive Levels

The program promotes the optimization of performance of existing central air conditioning systems, resulting in more efficient cooling of residential and commercial properties, thus reducing energy consumption.

Measure Level	Incentive Level	Measure Description
HEEP/CEEP A/C Tune-up	<p>The customer will receive a discount of:</p> <ul style="list-style-type: none"> <li>\$175 All Residential A/C Units</li> <li>\$100 All Multi-Family A/C Units</li> <li>Commercial \$150 on 5 Ton or less</li> <li>Commercial \$250 for 6 to 25 tons</li> <li>Commercial \$400 for 26 to 80 tons</li> </ul> <p>Cleaning evaporator coil            Cleaning blower assembly            Cleaning condenser coil            Adjusting air flow            RCA to manufacturer or CLEAResult specifications</p>	<p>Program-required test data is measured and collected by a Qualified Technician. Pending customer approval, typical improvement measures include: airflow adjustments, cleaning of indoor blower, evaporator coils, condenser coils, and refrigerant charge using program-required tools and procedures.</p>
HEEP/CEEP A/C or H/P Replacement	<p>The customer will receive a discount of:</p> <ul style="list-style-type: none"> <li>1.5 to 2 Ton A/C or H/P \$250.00</li> <li>2.5 to 3 Ton A/C or H/P \$300.00</li> <li>3.5 to 4 Ton A/C or H/P \$400.00</li> <li>5 Ton A/C or H/P \$500.00</li> </ul>	<p>Program-required commissioning is measured and collected by the qualifying Contractor/Technician. A copy of the AHRI sheet confirming efficiency and the contractors invoice showing the incentive has been applied as discount from the gross total of the invoice.</p>

### Incentive Basis

High-performance A/C Tune-up savings are determined by M&V IPMPV Option D, based on historical M&V data collection in the program. More information on this process can be found in the “CLEAResult M&V Plan.”

## Project Application Requirements

To receive reimbursement for A/C Tune-up incentive, Trade Ally must submit the following:

- The completed digital application which includes



- The customer invoice showing the incentive subtracted from the total
- A description of the work completed
- The customer's name and signature
- Date of completion
- All technical data required in the A/C Tune-up protocol, submitted via electronic data collection

## Project Application Process

Upon receipt of a signed, completed A/C Tune-up project application, CLEAResult will review the application for completeness, eligibility and then process the reimbursement for distribution to the Trade Ally.

Incentives are subject to availability and are offered on a first-come, first-served basis with no guarantee of availability to all customers. Applications for incentives must be sent within 10 business days of the tune-up completion date.

## Incentive Payment Process

Project incentives are paid to the Trade Ally that is represented as a discount on their invoice presented to customers.

CLEAResult will pay all eligible project applications within 30 days after verification of eligibility. If applications are received after 30 days following the actual service, contractors are required to contact CLEAResult to request a waiver due to their late submission. Program management will make the final decision whether to accept or deny late submissions.

## Limits on Participation

Both the cash incentives budgets and non-cash benefits available through the program are limited, based upon the Oklahoma Corporation Commission (OCC)-approved annual budgets, and are made available to customers on a first-come, first-served basis.

Trade Allies are encouraged to submit their applications as soon as possible to shorten processing time and to be sensitive of funding forecasts, which may determine the availability of program incentive funds.

CLEAResult will make all possible communication to contractors if incentive amounts change or if the program is ending before the official ending date. Notice will be given at least ten business days before that change is made.

## Overall Program Process

The A/C Tune-up program relies on interaction between the customer, Trade Ally and CLEAResult. The incentive is given as a discount to the customer from the Trade Ally, limiting the steps required to enjoy the benefits of the program. After review and approval of each submitted project to the program, the Trade Ally will be mailed reimbursement for the approved incentive provided to the customer.

## A/C Tune-up

The participation process begins with a residential or commercial customer choosing a Trade Ally to perform an A/C Tune-up, or with a Trade Ally approaching a customer to offer the tune-up service.

Contractors not yet participating in the program are welcome to enroll if they meet the requirements, are willing to complete the necessary training, and purchase the required toolkit. All contractors must be enrolled before performing any A/C Tune-ups on any systems they wish to be included in the program. The following process is outlined in Figure 2, below.

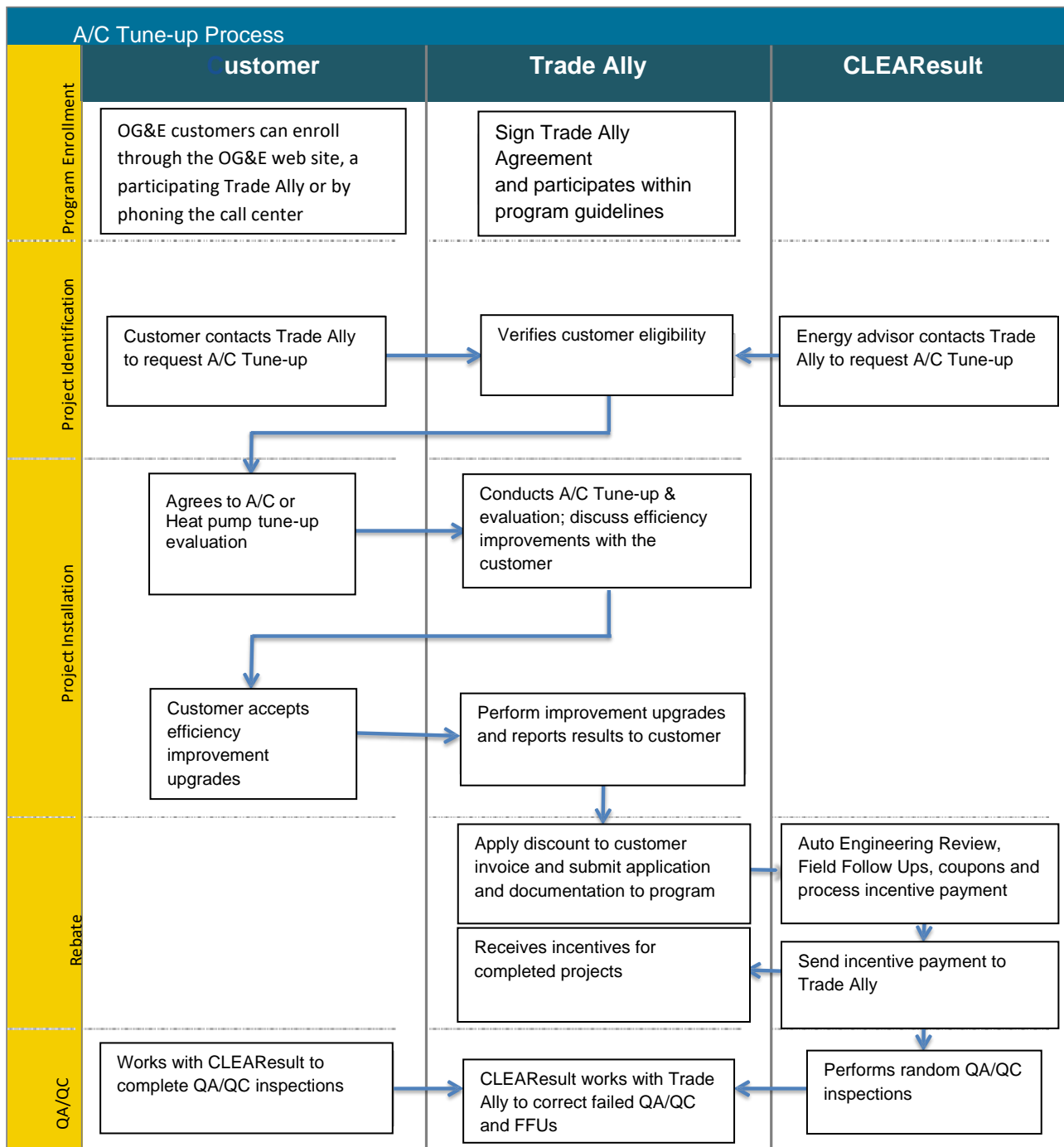
The Trade Ally discusses energy efficiency methods offered in the program. Once the customer has completed an A/C Tune-up or other measures, the discount is applied to the customer invoice, completing the customer's participation, unless optional QA/QC verification is implemented.

The Trade Ally then submits project data (including all applicable discounts) to CLEAResult. Upon review and verification of the application by CLEAResult, the payment is processed and submitted to the Trade Ally thus reimbursing them for the aforementioned discounts. If the project is selected for a QA/QC review, then CLEAResult will make direct contact with the customer to verify the system was serviced according to the program requirements.

## **ROB**

The participation process begins with a residential or commercial choosing a Trade Ally that is an authorized participating contractor, to perform a replacement on burn out. The efficiency in SEER rating has to be at least 16 or above. There is a commissioning process within the application of the approved tools, detailed in the Trade Ally agreement. The completed application including but not limited to the old and new equipment nomenclature of the indoor coil, air handler, and condenser information. The AHRI sheets and a copy of the contractors invoice signed by the OG&E customer showing the instant discount applied to the signed invoice. This is then submitted for review process, and QAQC.

Figure 2: A/C Tune-up Process



## Quality Performance

The Trade Ally, upon request from implementer, and at no additional cost to the customer, agrees to make reasonable repairs or corrections to work performed ensuring it meets the program standards. The repairs or corrections are to be completed within the time frame specified by implementer. The Trade Ally also agrees to take steps to ensure that future work will comply with the program standards. If the contractor fails to complete the required repairs within the specified time frame for any reason, the incentive payment may be withheld and/or probationary status may result.

## Quality Assurance

The implementer will perform post-installation/completion verifications on a statistically significant sample of all projects. CLEARResult reserves the right to site verify installations prior to approval and incentive payment for any project. Over time, as Trade Allies exhibit consistently high performance verifications for those Trade Allies may be reduced. Trade Allies who exhibit poor performance will be re-trained and have an increased number of their projects verified for a period of time and can be removed from the program if poor performance continues.

Figure 3: Quality Assurance Metrics

Program Process Trainings (QA)	HEEP/CEEP HVAC Training Class to be completed prior to becoming a Trade Ally for the programs.
Application Review (QA)	<ul style="list-style-type: none"> <li>▪ All submitted applications are reviewed for accuracy.</li> <li>▪ A percentage of installations and A/C Tune-ups will be field verified.</li> </ul>

Figure 4: Quality Control Inspection Metrics

QA Inspection Metric HEEP/CEEP A/C Tune-ups	<ul style="list-style-type: none"> <li>▪ All submitted data is reviewed for eligibility and accuracy prior to payment. If required information is missing the appropriate party is contacted.</li> </ul>
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## Complaint Resolution/Feedback

### Customer Complaints

Trade Allies are required to submit their customer complaint resolution process to CLEARResult for reference.

If a Trade Ally becomes involved in a dispute with a customer over business practices, the Trade Ally should work with CLEARResult to resolve the dispute amicably. If such discussion does not produce an outcome acceptable to the customer and the Trade Ally, the Trade Ally shall settle the dispute per their submitted customer complaint resolution process. Additional customer dispute information is contained in the Trade Ally Agreement (attached).

## Contractor Complaints

There is no formal process for Trade Ally complaints; CLEAResult handles these on a case-by-case basis.

## Customer Feedback

Customers that receive program quality control verification will be asked to fill out a satisfaction survey. 10% of customers that participate in the program will receive customer satisfaction surveys.

## Contractor Feedback

CLEAResult annually surveys Trade Allies for their feedback on the program's operation.

## Contractor Performance Standards

### Requirements for Participation

Trade Allies are required to submit the signed Trade Ally Agreement located at the end of this document, including all documents required therein to CLEAResult.

### Probation and/or Suspension

- CLEAResult will handle issues that may require a Trade Ally's probation, suspension, or program exclusion on a case-by-case basis.
- Contractor acknowledges that failure to follow program requirements and procedures, including processing of required documents, will result in a forfeiture of incentive reimbursement and possible disciplinary action.
- CLEAResult may suspend or terminate a Trade Ally's participation in the program for any reason, including failure to maintain the requirements set forth in this document. In all cases involving a Trade Ally's participation status, or denial of incentive reimbursement, CLEAResult's written decision is final. It is further understood that the Trade Ally can suspend or terminate the participation agreement at any time.
- Suspended or terminated Trade Allies shall surrender all promotional materials (i.e. cards, vehicle signs, yard signs, etc.) representing their participation in the program to CLEAResult, and shall cease and desist from further use of said materials.
- OG&E and/or CLEAResult are not responsible for any costs incurred by the Trade Ally due to probation or suspension from the program.

### Ethics/Fair Business Practices

- The Trade Ally acknowledges that participation in the program is a privilege.
- Trade Ally should not employ as a sub-contractor or employee, any firm or individual that has been suspended or terminated from this program or any other OG&E or CLEAResult program without OG&E's or CLEAResult's prior written permission.

- Trade Ally should not directly or indirectly disparage another Trade Ally. This includes, but is not limited to, in conversation with a customer or in print.
- Trade Ally should treat program clients fairly and respectfully, and deliver promised services in a timely and responsible manner.
- Trade Ally should properly represent his or her relationship with OG&E and/or CLEARResult (i.e. the Trade Ally is an independent contractor). Further, the Trade Ally should not make false claims about performance or savings, nor engage in fraudulent or deceitful conduct in the sale or installation of measures.
- Trade Ally commits to follow-up on customer inquiries to ensure satisfaction.
- Trade Ally will provide prompt, courteous and reliable service, while attempting to perform services at the customer's convenience, including the initial phone call, setting appointment times, and follow-up visits.

## Customer Service

It is the goal of OG&E and CLEARResult to provide the highest quality service and to maintain a high level of customer satisfaction. Expectations of Trade Allies include:

- Professionalism: All staff is expected to respond professionally to inquiries at all times.
- Reliability: Always provide accurate up-to-date information to customers. Be sure that follow-up activities are completed as promised.
- Responsiveness: Have all program or related information available for customers, obtain and relay answers to program-related requests in a timely manner.

## Customer Service Policies

To achieve the high levels of customer satisfaction that the program demands, the following customer service policies must be followed at all times:

- Do not
  - Smoke on customer premises
  - Contact customers when in any way under the influence of drugs or alcohol
  - Engage in unethical behavior or practices, including misrepresentation of delivered service
  - Do not give out incorrect information. If you cannot answer a question, inform the customer and get back to them with the correct answer.
- Do
  - Look, act and be professional
  - Wear protective covers at all times when working inside the customers' home
  - Treat customers with respect; the ultimate goal of this program is ZERO customer complaints. However, you should always notify the CLEARResult of any that occur.
  - Maintain the confidentiality of customer information

## Measure Standards

Performing a “Modeled” A/C Tune-up means that you are verifying to us that, upon completion, the blower, the evaporator and the condenser is clean, the airflow has been adjusted to proper CFM per ton and the refrigerant is adjusted properly. The condenser coils **MUST** always be cleaned. Inspect to determine if there is any dirt accumulation on the indoor blower assembly or evaporator coil. Any dirt that can be removed or that decreases performance must be cleaned, as long as the cleaning process will not cause further damage. Once these steps are complete, you are ready to “test out” and adjust the refrigerant charge.

The following steps are covered in training, along with detailed information about how and where to obtain measurements, tools and data collection requirements.

1. Turn on System to make sure everything operates.
2. Set up Project in the application, perform pre-inspection and confirm eligibility.
3. Perform professional cleanings: condenser/evaporator/blower.
4. Change or clean the indoor air filters.
5. Complete customer information in the application.
6. Set up tools to receive verified measurements.
7. Measure airflow with vane anemometer or approved static pressure method.
8. Measure and record # of returns and size of each if using air flow method 1.
9. Adjust/verify airflow to proper CFM per ton.
10. Adjust/verify refrigerant. Weigh in or out, enter in application.
11. Fill out condenser and compressor information and input length of line set.
12. Let system stabilize so that condenser is dry and performance measures are accurate.
13. Indoor temperature measurements should be taken from the return and supply plenums and be stable.
14. Liquid line is above the ODA and stabilized.
15. Take test-out snap shot.
16. Review test-out snap shot and correct any hard stops indicated in red and retake test-out snap shot.
17. Review the Field review page, take test-out snap shots as needed, or leave explanations for each field required. Explanations will be reviewed by the Engineering teams of CLEARResult for approval.
18. Reset the thermostat. Modeled test-out is complete.
19. Complete data submission to CLEARResult for processing.

Remember all components must be within program standards, we will inspect for a professionally clean condenser, blower, evaporator coil, and proper refrigerant charge. Each modeled A/C Tune-up indicates that this unit is operating in its best capacity.

## Training Standard

Training to be completed prior to a contractor participating in the program:

- HVAC Training Class
- In order to conduct and submit A/C Tune-ups in the program, technicians must attain “Qualified Technician” status and be issued a Qualification Number by demonstrating field competency, mastery of tools and techniques.

## DISCLAIMER

### Customer

The selection of a Trade Ally to perform the work is the sole decision of the property owner or authorized tenant. Inclusion of a Trade Ally to perform work does not represent an endorsement by OG&E or CLEAResult of any product, individual or company. Work performed by Trade Ally is not guaranteed or subject to any warranty, either expressed or implied, by either OG&E or CLEAResult. Neither OG&E nor CLEAResult make any guarantee or any other representation as to the quality, cost or effectiveness of the products provided or work performed by any Trade Ally, its employees, sub-contractors or suppliers.

## FREQUENTLY ASKED QUESTIONS (FAQS) - HEEP/CEEP A/C Tune-up Program

Q: When did this program start?

A: OG&E allowed contractors to start enrolling in this program and started marketing the program to HVAC contractors through industry channels in 2018.

Q: Where can contractors find out more information about this program?

A: Contractors can contact the CLEAResult implementation team for further information

Q: When will someone contact me after signing up to be a Trade Ally in this program?

A: Contractors will receive a welcome email in 1-2 business days with next steps after they have submitted a Trade Ally Agreement and it has been processed.

Q: When do the customers receive their discount?

A: Trade Allies provide customers with the discount at the time of the service. Trade Allies will be reimbursed for these discounts within 30 days after they have submitted complete documentation, and passed review from the Engineering team.

Q: What documentation do I need to send in to receive the incentive reimbursement and where should I send it?

A: Trade Allies using the iManifold toolkit and App will upload their completed A/C Tune-up file to CLEAResult when the tune-up is completed. Those using manual data entry forms will need to enter all field form data into the QuickBase Contractor Portal for every completed A/C Tune-up and attach a copy of the customer's invoice and data collection sheet with the correct amount discounted. Trade Allies will be instructed on the data submission process during technical training sessions.

Q: What are the incentive amounts?

A: Customers will receive an instant rebate from Trade Ally of \$175 per residential A/C unit, \$100 per multi-family A/C unit, Commercial customer will receive an instant rebate of \$150 per system up to and including 9 tons capacity, \$250 for systems 10 to 25 tons and \$400 on systems above 26 up to 80 tons. These systems may be eligible upon a case-by-case PRE-APPROVED basis by the implementer. This amount must be documented as a discount on the customer's invoice.



Q: What are the A/C Tune-up repairs that receive discounts?

A: The required and qualified efficiency repairs include: cleaning the condenser, evaporator coil, blower, measuring airflow, and refrigerant. Make adjustments to CFM and refrigerant levels to manufacturer's specifications and /or CLEAResult program standard.