

TRI-STATE GENERATION AND TRANSMISSION ASSOCIATION, INC.

ELECTRIFY AND SAVE PROGRAM GUIDE

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ELECTRIFY AND SAVE PROGRAM GUIDE

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General Program Information for Member Systems

- Information within this document serves to provide detailed incentive information, application procedures along with product guidelines and requirements to guide Tri-State Members in Electrify and Save (E&S) program participation. The term “Member”, or alternatively the term “Member System”, as used herein refers to an electric cooperative or public power district that is a current member of Tri-State Generation and Transmission Association, Inc. (“Tri-State”), and together with its staff.
- The newly enacted Colorado Privacy Act goes into effect in Colorado July 1, 2023. Member Systems are urged to get appropriate programs and procedures in place prior to said effective date to ensure their compliance with the Act in their collection and management of member-consumer information for this rebate program.
- Participating Member Systems may implement additional incentives and/or restrictions on any product. If additional incentives are implemented, please report those to program staff or input information on to each incentive form.
- The installation or purchase of used and/or refurbished equipment is not eligible for any rebate incentives under the E&S program. All E&S rebate payments are for new equipment installations only. New equipment purchases can be made direct from a contractor, retailer, distributor or manufacturer. If purchases are made from a source that also sells significant amounts of used equipment, such as Facebook Marketplace, validation of new equipment by Member System staff will be required.
- E&S rebate payments are for completed purchases or installation of a project with demonstrable, itemized and paid receipt(s) and/or appropriate attachments.
- Receipt(s) must be legible and clearly show detailed product make & model information, associated labor costs, consumer name, date and verification of purchase/payment unless otherwise noted.
- E&S rebate payments for on-line market purchases also require a proper receipt that is legible and clearly shows product make & model information, consumer name, date and verification of purchase/payment. Electronic order confirmations are not acceptable without clear indication of payment being received.
- Tri-State reserves the right to modify and/or stop this program at any time.
- Please direct questions regarding the program to the department contacts listed below:

E&S Program Support		
Edie Crespin	720-872-7114	ecrespin@tristategt.org
Mike Frailey	720-872-7054	mfrailey@tristategt.org
Mary Kuenn	303-254-3366	mkuenn@tristategt.org
Pete Rusin	720-872-7176	prusin@tristategt.org
Program Email		EEPrebates@tristategt.org

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Application Form Requirements Overview

- Under the 2023 program structure, Tri-State relies on the Member Systems' verification and submission of required information for the accurate and efficient implementation of the E&S program. If at any point during the application submittal process there are questions, please contact a member of the program support team.
- Application submittal for the E&S program is available through electronic forms located on the Member Information Center (MIC) website under the Member System's Collaboration page or under the *Products & Programs* and *Electrify and Save* drop down menus.
- Member Manager/CEO written approval is required for new access requests to the MIC website. If you need access to the MIC, please direct this request to your relationship manager or Mary Kuenn, mkuenn@tristategt.org.
- Review the required information in the application form before going on-site or into the field to gather Member consumer information.
- To qualify for rebate incentive, products and/or services must be purchased by a Member's retail electric customer ("consumer"), and must be connected and used on the Member's power distribution system.
- A participating Member consumer may complete and submit an application to the Member System up to 90 days after (1) the date of product purchase or (2) the issuance date on the Certificate of Occupancy or (3) delivery /installation date, whichever occurs later (delivery/installation date does not apply to residential LED rebate requests), but in all cases within the applicable rebate period. Member Systems have an additional 14 days to submit application to Tri-State. Please review the Project Documentation and Application Attachment section in this program guide prior to attaching documents to an application.
- An application is complete when the required fields are filled out and required documentation is attached and submitted.
- A preliminary rebate incentive will be calculated when the application form is completed. Please note this amount is only an estimate and may vary from the actual rebate payment based on application review and confirmation that qualification criteria are met. The actual rebate amount will reflect the value for the calendar year in which it is submitted. **Rebate calculations will not be modified to reflect prior year incentives.**
- All E&S programs are subject to a \$20,000 per consumer account

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- When an application is submitted, a system generated email with the application information will be sent to the email address entered in the “Member System Contact e-mail” field on the form. To enhance communication and for record keeping purposes, multiple Member System staff emails separated by a semicolon will provide confirmation and status change emails to each staff member included. This feature is intended for communication with Member System staff only. Please do not include email addresses outside Member System staff (See Figure 1 for example).

Electric Vehicle Charging Equipment

Member System Contact e-mail: afrancone@pvrea.coop; mwagner@pvrea.coop

Figure 1

- Additional application status emails will follow as needed, applications which can't be approved when reviewed will be given a rejected or pending status. Please review all application status emails to ensure the required application information is provided and the final approved application is correct.
- If a hard copy of the application form is desired at the time of entry, click the *Print* button at the bottom of the form before clicking *Submit*.
- Each Member System's application form, must include the following language: “The Electrify and Save Program is administered in conjunction with Tri-State Generation and Transmission Association, Inc. (“Tri-State”). The undersigned applicant, by electing to participate in the Electrify and Save Program, and in consideration of such participation, accepts and agrees to the following terms and conditions:
 1. Tri-State makes no representation or warranty whatsoever regarding any product installation or service in connection with the Electrify and Save Program, including without limitation, installation services or workmanship of vendors installing products or providing services in connection with the program, performance of installed equipment or products qualifying for rebates, and energy savings derived from participation in the Electrify and Save Program.
 2. Applicant does hereby RELEASE, WAIVE, DISCHARGE, AND COVENANT NOT TO SUE Tri-State and officers, agents, and employees (hereinafter referred to as “Releasees”) from any and all liability, claims, demands, actions, and causes of action whatsoever arising out of or related to any loss, damage or injury, including death, that may be sustained by you, or any of the property belonging to you, whether caused by the negligence of the Releasees, or otherwise, in any way arising from participation in the Electrify and Save Program.
 3. Applicant understands that it is participating in the Electrify and Save Program at its own risk, and that it is Applicant's responsibility to independently research the products and services covered

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by the program, and to further exercise care and diligence in selecting vendors and installation contractors.

4. Tri-State’s review of rebate applications for the Electrify and Save Program may subject Tri-State to certain requirements of the Colorado Consumer Privacy Act (CRS § 6-1-1301, et. seq.). Tri-State’s collection of data for the Electrify and Save Program is limited to data provided on rebate applications, or otherwise provided for rebate qualification, and is used for the sole purpose of evaluating compliance with the requirements of the Electrify and Save Program. Tri-State will not share applicant data with third parties other than with the applicable Member System in connection with the administration of the Electrify and Save Program; or otherwise as may be required by law or governmental regulation. Questions regarding Tri-State’s use of applicant data may be directed to ee rebates@tristategt.org.

Project Documentation and Application Attachment Information

- Most E&S product incentives require project documentation to complete the application. E&S applications that are missing required documentation are considered incomplete and will not be approved until the required documentation is submitted. Information on what is needed to complete the application will be communicated via the status update email.
- Please attach all required documents via the attachments field on the electronic application.
- If you receive an error or have difficulty submitting an application with attachments, it is likely due to the attachment file name. Please use the naming guidelines below for best results.
 - File names **cannot contain any of the special characters** noted after sub-bullet below
 - <, >, :, /, \, |, ?, *
 - To keep file names short, use the E&S product abbreviations (noted in Table 1) and the following naming convention
 - **Member System Initials “space” Member Name “space” E&S Product Abbreviation**
 - Examples
 - Mountain View Electric Association, member John Doe, air-source heat pump
 - **MVEA JDoe HP**
 - Niobrara Electric Association, member Sioux County School District, LED retrofit
 - **NEA SiouxCountySD CLED**

Table 1: Electrify and Save Product Abbreviation Examples

E&S Product	Abbreviation
Residential	
LED Lamps	RLED

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EnergyStar® Appliances	APPL
Low Income Weatherization	LIW
Residential and Commercial	
Electric and Heat Pump Water Heaters	WH
Whole House Fan	WF
Smart Thermostats	ST
Electric Thermal Storage & Slabs	ETS
Heat Pumps (Air & Ground-source)	HP
Outdoor Power Equipment	OP
Electric Vehicle Chargers	EV
Commercial	
LED Lighting	CLED
Irrigation Motors	IM
Variable Speed Drives	VSD
Document Types	
Receipt	RCPT
Product Specifications	SPEC

- If an attachment is not accepted using the online application, please email attachment to EEPrebates@tristategt.org. Attachments will be reviewed and verified by the approver.
- Use the “Comments” field on the application to indicate any additional information or special circumstances surrounding the application. For example, adding a note when multiple applications are submitted for the same product category under one consumer name/account can help program staff determine if the applications are duplicates.
- Multiple consumer applications for the same rebate category should be combined where possible. For example, if one consumer purchases several items qualifying under the Outdoor Power Equipment rebate, these should be combined into one application form. Multiple applications without reason may be rejected and require a re-submission to be made.

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- Member Systems are expected to verify required metrics for each rebate application.
- If additional product verification is needed - vendors, designers or contractors should be contacted to assist Member Systems in gathering the requested information.

E&S Rebate Processing and Payments

- Tri-State will send a single rebate payment to a Member System for all approved E&S incentive applications during a specific period. The Member System is responsible for distribution to their member consumers and/or installation contractors.
- Member Systems are expected to retain receipts, applications, or other information related to rebate payments. This can be done electronically or with hard copies.
- **PLEASE NOTE:** The Member System is responsible for complying with all applicable IRS reporting and record-keeping in connection with the administration of the E&S rebate payment, including the issuance of all required IRS 1099 forms. Please be aware that certain rebate thresholds and exemptions may apply, such as for residential rebates versus non-residential rebates. See IRS Instructions for Form 1099, and other applicable IRS instructions and publications, for more details. Please also consult a tax professional if you have questions.

Rebate Correction Process

Errors within rebate applications that flow through into the payment process must be corrected in a specific manner to ensure data accuracy and reduce audit vulnerability for both Tri-State and our Members. While there may be variances on a case-by-case basis, the outline below indicates the general process that must be followed.

Pre-Payment Rebate Corrections

- If an error is discovered after the rebate has been submitted, but prior to payment, please contact program staff immediately. Program staff should be able to revise the rebate application prior to running the monthly “AP Report”.
- For efficient application processing, program staff request that member systems review all confirmation and status update notification emails and respond in a timely manner to complete the rebate application.
- Tri-State’s AP report is provided to members prior to the payment issuance. If an error is noticed at this time, contact program staff immediately.

Post-Payment Rebate Corrections

- The full amount of the member-consumer rebate needs to be reimbursed to Tri-State regardless if the payment amount the Member System received on behalf of the member-consumer is too much or too little. The member-consumer rebate must be returned in full as documented by the share point record/AP Rebate Report to provide a verifiable and correct auditing trail.

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- Checks should be sent to:
 - Attn: Mary Kuenn
 - Tri-State Generation and Transmission Association, Inc.
 - P.O. Box 33695, Denver, CO 80233-0695
- The check must be accompanied with a memo or note to identify what it is for, at a minimum it should note:
 - Member System name
 - Member-consumer name
 - The electrification and/or efficiency product in question
- If the original application can be corrected by Tri-State program staff, no further action will be required by the Member System and the application will be reapproved and paid in the rebate process cycle that occurs after Tri-State's receives the returned funds
- If the application must be resubmitted, Tri-State program staff will advise the Member System. The resubmittal of the application is the responsibility of the Member System
- For questions or clarifications of this process, please contact Mike (mfrailey@tristategt.org) or Mary (mkuenn@tristategt.org)

Residential and Small Commercial Products

Residential LED Lamps and Fixtures

Incentive

- 50% of lamp or fixture cost
- Capped at \$8 per lamp or fixture

Product & Application Requirements

- Lamps or fixtures must have a minimum output of 500 lumens
- No attachments required

Product Guidelines

- Maximum of 50 lamps per account per year, unless prior authorization is received from Tri-State
- Medium base (standard residential base), GU24 base, other residential oriented base or, fixtures with integrated LEDs that meet the above criteria qualify
- LED fixtures with multiple light sources (e.g., multiple LED tubes, rope-light, or under counter lighting) are designated as one fixture
- Applies only to equipment that is purchased by the Member System, member-consumer or a state authorized Low Income Weatherization Agency

Electric Appliances and Recycling

Incentive

- Energy Star® Certified Clothes Dryer
 - \$30 per unit for clothes dryer
 - \$90 per unit for heat pump clothes dryer (vent-less)
- Induction cooktops/range measuring 30" or larger
 - \$100 per unit for electric-to-induction replacements
 - \$350 per unit for gas-to-induction replacement or new construction
- Refrigerator and/or Freezer Recycling
 - \$60 per unit

Product & Application Requirements

- Itemized receipt (please see p.3 for clarification on acceptable receipts)
- EnergyStar® certified make & model number (for clothes dryer purchases only)
- Replacement of existing gas cooktop/range units require verification; photographs of the old unit are sufficient.
- Limit of two (2) full-size refrigerator or freezer recycle incentives per consumer per year
 - Refrigerators and freezers are considered full-size at 7.75 cubic feet or greater
- Proof of recycling preferred but not required

Smart Thermostats

Incentive

- \$25
- \$50 when member-consumer is participating in managed member system program

Product & Application Requirements

- Product make & model number
- Itemized receipt (please see p.3 for clarification on acceptable receipts)

Product Guidelines

- Limit 2 thermostats per member-consumer account, except for line voltage
- Line voltage Smart thermostats limit is 5 per member-consumer account
- Smart Thermostat must be WiFi network capable and installed at the consumer account location
- Managed programs include Member System led demand response control or time of use rate

Whole House Fans

A whole house fan is a type of fan, commonly venting into a home's attic, designed to circulate outside air into a home. This should not be confused with powered attic ventilation or in-line duct fans. For any interpretation on the qualification of an item as a whole house fan, please contact program staff.

Incentive

- \$100

Product & Application Requirements

- Product make & model information
- Itemized receipt (please see p.3 for clarification on acceptable receipts)

Product Guidelines

- Replacement or new installations qualify
- Limit 2 per member account

Evaporative Cooler

An evaporative cooler is a device that cools through the evaporation of water via integrated water media pad(s) and a fan. For any interpretation on the qualification of an evaporative cooler, please contact program staff.

Incentive

- \$200

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Product & Application Requirements

- Itemized receipt (please see p.3 for clarification on acceptable receipts)
- Product make & model information
- Minimum 2,500 CFM

Product Guidelines

- Replacement or new installations qualify
- Limit 2 per member-consumer account
- No window or portable units

Outdoor Power Equipment Electrification

Incentive

- Electric riding mower- 25% of cost up to \$1,000
- 2-stage/motor snow blower- 25% of cost up to \$250
- Electric snow blower, walk-behind mower and bicycles- 25% of cost up to \$150
- Electric chainsaws- 25% of cost up to \$100
- Electric Trimmers, pruners, leaf blowers and power-washers- 25% of cost up to \$50
- Additional batteries- 50% of cost up to \$25

Product & Application Requirements

- New battery or corded electric equipment only
- Minimum purchase price of \$50
- Itemized receipt (please see p.3 for clarification on acceptable receipts)

Product Guidelines

- Equipment not listed under incentives above is not eligible for a rebate
- Retrofit kits and/or do-it-yourself electric equipment builds are not eligible, including add-on kits for bikes
- Other than electric bikes, member-consumers are limited to one rebate per product type per year. Requests for considerations around this may be made for commercial landscape providers, but this must be done prior to the rebate being filed.
- An aggregated maximum rebate of \$300 per member account applies to listed equipment except riding lawnmowers (stand-alone \$1,000 cap per member account)
- Additional batteries purchased with and for qualifying equipment can be included with original purchase rebate application (one additional battery per product limit).
- Replacement or battery-only purchases are not eligible.

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- Multi-piece equipment combinations are eligible for individual rebate amounts provided \$50 cost minimum is met
- Additional battery rebates will be considered in multi-piece combinations if the number of batteries exceeds the number of products
- Battery chargers do not qualify for any incentives

Electric Water Heaters

Incentive

- Electric Resistance Water Heater
 - \$50/unit for either member system managed water heater programs, fuel-switching from natural gas or propane or Demand Response (DR) capable water heaters
 - \$30/unit for new construction
- Air-Source Heat Pump Water Heater
 - \$350/unit

Product & Application Requirements

- 30-gallon tank minimum
- Air-source heat pump water heaters must be EnergyStar® rated
- DR capability must be verifiable in product specifications
- Itemized receipt (please see p.3 for clarification on acceptable receipts)

Product Guidelines

- Managed programs include Member System led demand response control or time of use rate
- A unit serving as backup for another source such as solar water heating or ground-source heat pump does not qualify. Please note, desuperheater equipment incentives can be found in the ground-source heat-pump section and in the ground-source heat pump application on the MIC
- EnergyStar® certified model number only required for Heat Pump Water Heaters

EnergyStar® Rated Split System Air-Conditioners

Incentive

- \$100/unit

Product & Application Requirements

- Itemized receipt, including breakout of equipment and labor (please see p.3 for clarification on acceptable receipts)
- Must be EnergyStar® rated
- Minimum 16 SEER or 15.2 SEER2
- Minimum qualifying equipment size is 1 ton

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- Window units do **not** qualify

Product Guidelines

- EnergyStar® rating – A complete list of qualified equipment is available at www.energystar.gov
- SEER and SEER2 are an industry performance indicator of cooling performance for air conditioners and heat pumps based on the matched set of indoor and outdoor equipment

Electric Thermal Storage (ETS) and Thermal Slab Units (TSU)

Incentive

- Controlled Off-Peak Heating ETS
 - \$16/kW
- Controlled Off-Peak Heating TSU
 - \$12/kW

Product Requirements

- Units must be controlled by timers or a master control system
- Minimum qualifying load for ETS is 1 kW

Electric Heat Pump – Air Source

PLEASE NOTE- All air-source heat pump incentives are based on the total “size” of the heat pump system’s outdoor unit or (in some cases) units, specifically the outdoor unit coil capacity in tons; while the indoor unit(s) impact the system efficiency ratings, indoor exchange unit capacities are not to be included in the total system size on the rebate application. One ton is defined as 12,000 BTUs for this purpose.

Incentive

- Tier 1- Efficient Air Source Heat Pump
 - Required HSPF ≥ 9.0 and SEER ≥ 15 or, HSPF2 ≥ 7.8 and SEER2 ≥ 15.2
 - ≤ 2 tons = \$675 (not to exceed 50% equipment cost)
 - > 2 tons = \$1800 (not to exceed 50% equipment cost)
- Tier 2 - Cold-Climate Certified Air Source Heat Pump
 - HSPF ≥ 10.0 and SEER ≥ 16 or, HSPF2 ≥ 8.1 and SEER2 ≥ 15.2 ; variable speed compressor or a minimum of 3 stages (settings for fan speed)
 - ≤ 2 tons = \$1000 (not to exceed 50% equipment cost)
 - > 2 tons = \$2400 (not to exceed 50% equipment cost)
- Air-to-water heat pump units will be taken on a case-by-case basis. Please include manufacturer, product model number, the rated capacity/size (in tons) and any efficiency specifications available. Program staff will validate specifications and calculate rebate using the same tier structure as air source heat pumps.
- \$100/unit additional incentive for central air source with integrated controlled ETS backup in lieu of a separate ETS incentive

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Product & Application Requirements

- Equipment manufacturer and model number identification
- Relevant equipment metrics (e.g. SEER, HSPF or, HSPF2)
- Itemized receipt, including breakout of equipment and labor (please see p.3 for clarification on acceptable receipts)

Product Guidelines

- Accounts may be eligible for more than one rebate depending on project scope or building type and will be handled on a case-by-case basis
- SEER and SEER2 is an industry performance indicator of cooling performance for air conditioners and heat pumps based on the matched set of indoor and outdoor equipment
- HSPF and HSPF2 is an industry performance indicator of heating performance for heat pumps based on the matched set of indoor and outdoor equipment

Air Source Heat Pump Quality Install Incentive

- Up to \$250 per installation for certified installers

Product & Application Requirements

- Installer applications must be submitted with the application for the member-consumer heat pump rebate application
- Attachments – completed forms should be attached to the heat pump application form

Product Guidelines

- Contact Tri-State staff to enroll interested contractors
- Installers must complete training and complete required application to qualify for incentives
- Multiple units installed at one account are subject to a limit of one (1) installer incentive. Tri-State staff should be contacted for interpretation or approval prior to installation
- Installer application spreadsheet is available on the MIC for Member System

Electric Heat Pump – Ground Source Incentive

- \$500 per ton for new systems
- \$250 per ton for replacement systems
- \$100 per unit for ground source heat pump powered hot water (a.k.a. desuperheater)

Product & Application Requirements

- Manufacturer and model number identification
- Relevant equipment metrics (EER, COP)

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- Itemized receipt, including breakout of equipment and labor (please see p.3 for clarification on acceptable receipts)

Product Guidelines

- EnergyStar® rating not required
- New or replacement ground source heat pumps with closed-loop or open-loop water source heat pumps qualify
- A desuperheater is an optional heat transfer device for domestic water-heating from a ground source heat pump
- Back-up and/or hot water storage tanks associated with a desuperheater are not eligible for additional rebates
- EER is an industry standard ratio of the cooling capacity to the power input
- COP is an industry standard ratio of useful heating or cooling provided to work required

Electric Vehicle Charging Equipment Rebates

Note: EV Charging installations for multifamily housing units and fleets please contact program administration staff

Level 2 (Residential/Commercial/Public)

Incentive

- 50% of total equipment and electric service installation costs up to \$500 for non-managed chargers
- 50% of total equipment and installation costs up to \$1,000 for Member System managed chargers

Qualifying Installations

- Residential (limit 2 chargers per member account)
- Commercial (private fleet)
- Public (no fees for energy)

Product & Application Requirements

- **All equipment and installation costs are required to be on one application to be eligible for full rebate amount**
- EVSE manufacturer and model number identification
- Itemized receipt, including breakout of equipment and labor (please see p.3 for clarification on acceptable receipts)
- Note- if an itemized receipt is not available, rebate amounts may be reduced
- Member System is responsible for verification of installation
- Attach photo(s) of installation

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Product Guidelines

- It is the responsibility of the installer to ensure that all local and national building and electrical codes are met
- Managed programs include member system led demand response control or time of use rate

Level 2 (with network and fee for charge capability)

Incentive

- 50% of EV charging equipment and electric service installation costs up to \$1,000

Qualifying Installations

- Must be accessible to the general public, private installations do not qualify

Product & Application Requirements

- **All equipment and installation costs are required to be on one application to be eligible for full rebate amount**
- EVSE manufacturer and model number identification
- Itemized receipt, including breakout of equipment and labor (please see p.3 for clarification on acceptable receipts)
- Note- if an itemized receipt is not available, rebate amounts may be reduced
- Member System is responsible for verification of installation
- EV charging equipment is required to be network capable
- One rebate per installed charger; multiple charge connectors/ports associated with a single charger do not qualify for multiple rebates
- Attach photo of installation

Product Guidelines

- It is the responsibility of the installer to ensure that all local and national building and electrical codes are met
- Managed programs include Member System led demand response control or time of use rate

Direct Current Fast Charger (DCFC)

Incentive

- 50% of EV charging equipment and electric service installation costs up to \$3,000 for 50 - 75 kW maximum station output
- 50% of EV charging equipment and electric service installation costs up to \$5,000 for 76 - 149 kW maximum station output
- 50% of EV charging equipment and electric service installation costs up to \$7,500 for 150 & above kW peak output

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Product & Application Requirements

- **All equipment and installation costs are required to be on one application to be eligible for full rebate amount**
- Publicly accessible installations only
- Proprietary technology (IE – Tesla) requires pre-approval from program staff and will be limited to 50% of rebate value
- EVSE manufacturer and model number identification
- Itemized receipt, including breakout of equipment and labor (please see p.3 for clarification on acceptable receipts)
- Note- if an itemized receipt is not available, rebate amounts may be reduced
- Member System is responsible for verification of installation
- One rebate per installed charger; multiple charge connectors/ports associated with a single charger do not qualify for multiple rebates
- Attach photo of installation

Product Guidelines

- It is the responsibility of the installer to ensure that all local and national building and electrical codes are met
- EV charging equipment is required to be network capable
- One rebate per installed charger; multiple charge connectors/ports associated with charger do not qualify for multiple rebates
- Maximum station output is defined by a single charger output, and excludes paired charger/inverter design construction.

Low- and Moderate-Income Program

This program is intended to facilitate lowering the energy burden for low- and moderate-income (LMI) members. Eligible measures are listed below along with application requirements. (Note— LMI incentives apply only to equipment, materials and labor provided by a state authorized local low-income weatherization agency. Self-directed LMI rebates are planned for later in 2023.)

Weatherization Incentive

- Tri-State will reimburse local Weatherization Agency approved installation measures up to:
 - \$500 for labor & material cost per household with electric heat source
 - \$250 for labor & material cost per household with non-electric heat source

Product & Application Requirements

- Itemized receipt from state authorized agency for equipment, materials and labor provided
- All required application form fields

Product Guidelines

- The Weatherization incentive applies only to materials and labor provided by a state authorized local low-income Weatherization Agency not covered by other Tri-State incentives (e.g., EnergyStar® appliances, LED lighting, heat pumps, etc.)
- Items covered under the Weatherization incentive
 - Insulation for walls, attics, floors, pipes, and ducts
 - Storm windows and doors
 - Replacement windows and doors
 - Caulking, sealing, and weather-stripping
 - Electric water heater insulation
- Multi-family housing may have a special case where only a portion of the units are occupied by low-income qualified participants. Tri-State adheres to Federal guidelines that indicate the percentage of low-income units that must qualify before all units may be retrofitted under the program.
- Consumers must meet the income and other qualifications of the Federal Weatherization Assistance Program as implemented in their state and be participating in the program or they must meet the income and qualifications of a Member System income qualified program (Member System program income guidelines not to exceed 80% of Area Median Income). They may own or rent their residences: single family homes, multi-family units, duplexes, and other rental locations where at least 66% of the units qualify under the low-income guidelines.

LED Lamps and Fixtures

Incentive

- \$1.50 per lamp
- Specialty/higher value lamps can be applied for on Residential LED application

Product & Application Requirements

- Lamps or fixtures must have a minimum output of 500 lumens
- No attachments required

Product Guidelines

- Maximum of 50 lamps per account per year, unless prior authorization is received from Tri-State
- Medium base (standard residential base), GU24 base, other residential oriented base or, fixtures with integrated LEDs that meet the above criteria qualify
- LED fixtures with multiple light sources (e.g., multiple LED tubes, rope-light, or under counter lighting) are designated as one fixture

Energy Star® Appliances

Incentive

- Energy Star® Certified full-size Refrigerators and Freezers
 - \$30 per unit
- Refrigerator and/or Freezer Recycling
 - \$60 per unit
- Energy Star® Certified Clothes Washers
 - \$30 per unit for top load washers
 - \$40 per unit for front load washers
- Energy Star® Certified Clothes Dryer
 - \$30 per unit for clothes dryer
 - \$90 per unit for heat pump clothes dryer (vent-less)
- Energy Star® Certified Dishwashers
 - \$20 per unit

Product & Application Requirements

- Itemized receipt (please see p.3 for clarification on acceptable receipts)
- EnergyStar® certified make & model number
- Replacement of existing gas cooktop/range units require verification; photographs of the old unit are sufficient.
- Limit of two (2) full-size refrigerator or freezer recycle incentives per consumer per year
- Refrigerators and freezers are considered full-size at 7.75 cubic feet or greater
- Proof of recycling preferred but not required

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Smart Thermostats

Please see p.10 for product information

Electric Water Heaters

Please see p.13 for product information

Electric Heat Pump – Air Source

Please see p.13 for product information

Commercial and Industrial Products

Commercial LED Lighting

There is one Commercial LED lighting application with multiple LED lighting categories:

- LED Lamps Only
- LED Fixtures
- LED Indoor Agricultural Lighting
- Exit Signs and Occupancy Sensors
- Refrigerated Case Lighting
- Pole Mounted Lighting

Incentive

- The incentive will be the lower of:
 - As outlined on the Application Form or;
 - 50% of fixture and lamp material cost or;
 - Per project caps as outlined in individual product requirement sections below

Product & Application Requirements

- Itemized receipt (please see p.3 for clarification on acceptable receipts)
- Provide product specification sheets from contractor or consumer to validate all product requirements
- Use notes field on application to reference all individual product numbers included in a lighting category (e.g. if there a 3 different models of 4' wrap fixtures the application note needs to reference all 3 different model numbers and quantities)
- LEDs must be Design Light Consortium (DLC) certified (<https://www.designlights.org>)
- Some LEDs are not rated by DLC (e.g. can lights), EnergyStar is acceptable in these cases

Product Guidelines

- Incentives apply to permanent lighting installations at any commercial location
- LED-to-LED retrofits do not qualify
- LED message/sign boards do not qualify
- Battery-powered, emergency-only lighting systems do not qualify
- Motion-activated security lights do not qualify
- Due to evolving LED technology, member system personnel should contact the program support staff or email EEPrebates@tristategt.org to validate lighting product qualification or category prior to the start of construction
- No authorization is required from Tri-State prior to the submittal for the lighting project prior to the start of construction

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- Per project cap of \$20,000, unless approval is received by Tri-State prior to application submittal
- Applications will be reviewed after project is completed and product verification will be based on the as-built information provided
- Final incentive calculations are subject to this review
- A project is considered to apply to all fixtures and lamps contained in the application, excluding pole mounted lighting and refrigerated case lighting, which have their own project caps defined below
- Retrofit is defined as lighting changes that do not require moving or adding to the existing electrical circuits and junction box locations
- Lighting that requires new or relocated junction boxes is considered new construction
- See individual product incentive, application requirements, guidelines and potential rebate caps in sections below

LED Lamps Only - Product Requirements

- High Output (HO) lamps must be defined as such in the lamp model number and/or specifications
- Type C lamps must be defined as such in the lamp model number and/or specifications
- All lamps must be a minimum of 500 lumens to qualify

LED Fixtures - Product Requirements

- Items submitted under fixtures must be a complete fixture replacement
- Fixtures purchased without lamps do not qualify; lamps should be submitted under LED lamps
- All fixtures must be a minimum of 500 lumens to qualify
- Retrofit kits are required to include a reflector to be eligible for fixture rebate and should be submitted under the appropriate fixture type
- Retrofit kits without a reflector can be submitted as a lamp-only replacement

Exit Signs and Occupancy Sensors Incentive

- Exit signs- \$7 each
- Occupancy sensor- \$15 each

Product & Application Requirements

- Include product make and model information
- Exit Signs must be illuminated and hard-wired

Refrigerated/Freezer Case LED Lighting Incentive

- Reach-in cases: \$60 per door
- \$10 per linear foot for top lighting of multi-deck open cases
- Per Project Cap of \$3,000 (50 doors or equivalent)

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- Capped at 50% of the fixture material cost

Product Guidelines

- New construction and retrofit projects qualify
- Incentive applies to medium and low temperature reach in refrigerated cases and multi-deck open cases

Pole Mounted LED Lighting Incentive

- The incentives will be the lower of:
 - 25% of the material cost for each head,
 - Per project cap of \$20,000 applies only to Pole Mounted Lighting Category

Product Guidelines

- Only new LED fixtures qualify
- Minimum Lumens as stated in the application
- Lighting directly attached to buildings, signs, parking garages, or off-street pedestrian lighting, bollards or lamps of less than 2,100 lumen output do not qualify as Pole Mounted Lighting
- Screw-in LED lamps and LED retrofit kits do not qualify as Pole Mounted Lighting. Please see the *LED Lamps Only* section on the Commercial LED Lighting application form

Commercial & Industrial Electric Motors Incentive

- \$8 per Horsepower (hp)
- Wiring assistance for electric irrigation motors that replace a fossil-fuel engine or new installation
 - \$1.50/hp

Product & Application Requirements

- Itemized receipt (please see p.3 for clarification on acceptable receipts)
- Motors must be a minimum of 10 horsepower

Product Guidelines

- The Member System and consumer must certify that the motor is new and neither re-wound or moved from another location
- Per project cap of \$20,000

Variable Speed Drive Retrofit Incentive

- New and retrofit application
- The incentives will be the lower of:

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- 50% of the cost of the VSD unit or,
- Project cap of \$20,000
- Reference table:

Motor	
Nameplate hp	Incentive
Less than 25	No Incentive
25	\$1,600
30	\$1,750
40	\$2,050
50	\$2,350
60	\$2,650
75	\$3,100
100	\$3,800
125	\$4,600
150	\$5,300
200	\$6,800
250	\$6,800
Larger than 250	\$6,800

Product & Application Requirements

- Itemized receipt (please see p.3 for clarification on acceptable receipts)

Product Guidelines

- If a new motor is installed at the same time, it may qualify for a separate motor incentive
- Replacement of existing VSDs, for maintenance or other purposes, does not qualify
- Soft start kits added to existing motors are not eligible for this rebate

Forklift Electrification

Incentive

- Up to \$5,000 for electric forklifts
- Up to \$1,500 for electric pallet jacks
- Project cap of \$20,000
- Program cap of \$150,000

Product & Application Requirements

- Itemized receipt (please see p.3 for clarification on acceptable receipts)

Irrigation Audits

Incentive

- 75% of irrigation audits cost up to \$1,000

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Product & Application Requirements

- Itemized receipt (please see p.3 for clarification on acceptable receipts)
- A post-installation report should include any comments from the Member System or the consumer regarding the perceived value of the audit, whether the consumer intends to move forward with implementation of particular audit recommendations, and whether there had been a drop in overall energy use, including fossil fuel consumption, which could be attributed to the audit or implemented measures

Product Guidelines

- Only applies to audits of irrigation systems
- Audits can be performed by certified energy auditors with irrigation experience, certified well or irrigation system servicers, or other knowledgeable entities verified with program support staff
- Irrigation audit funding is subject to implementation of at least one audit item, verified by Member System staff
- Implemented items may qualify for additional Tri-State E&S products

Energy Audits

This program facilitates commercial, industrial, and agricultural producers' access to professional energy audits at a fraction of the cost. Further, qualified equipment installations are eligible for existing measure incentives.

Incentive

- This product involves Tri-State providing up to 75% funding of audits for industrial and agricultural processing-focused businesses using a Tri-State approved auditor such as EPRI, Industrial Assessment Center (IAC), or a qualified commercial auditor. IAC specific eligibility requires annual energy bills greater than \$100,000 and no more than \$2,500,000. Tri-State reserves the right to limit participation and audit funding.

Product Requirements

- A post-audit report should include any comments from the Member System or the consumer regarding the perceived value of the audit, whether the consumer intends to move forward with implementation of particular audit recommendations

Product Guidelines

- Limited Tri-State funding may be made available to implement audit recommendations, particularly if there is matching Member System participation. It is highly recommended to contact program staff to see if funds remain before scheduling your audit.
- Note – irrigation system audits qualify for incentives under the Irrigation Audit product, but can also be included in an overall agricultural process audit

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Partnership Program

Incentive

- Tri-State may fund one or more Partnership Project(s)
- Member Systems and the consumer are expected to match Tri-State's incentive

Product Guidelines

- Tri-State's Partnership Projects program is designed to be supplemental to our existing energy efficiency and electrification measures and enable support of Utility Members who are working on efficiency projects or grant applications that may be specific to their local areas. Efforts are considered on a case-by-case basis and are driven by Utility Member staff.