



Energy Management Systems

Rebate application and project worksheet

To obtain rebate preapproval for qualifying Energy Management Systems, **you must complete and submit this form, along with the vendor's project proposal or statement of work, AND proposed equipment design specs/feature sheet. Including as much detail as possible to help you obtain a more accurate analysis and maximize your savings!**

Business customer information

Company name _____ Date submitted _____

Billing address _____ City _____ State _____ ZIP _____

Facility address (if different) _____ City _____ State _____ ZIP _____

Contact name _____ Phone _____

Contact email* _____ Fax _____

Send rebate check to: Billing address Facility address Alternate rebate recipient (see below)

Technical project contact (if different) Name _____ Phone _____ Fax _____

Customer preapproval signature (customer tied to Xcel Energy premises number) _____ Date _____

By signing here, I acknowledge the information in this application is accurate and complete. I confirm I have read, agree with and understand the rules and requirements on page 5 of this application.

Please indicate here if you DO NOT want this project's preapproval or denial status given to the vendor providing the product and/or service.

Alternate rebate recipient

Note: Complete this section only if customer wants rebate check to go to someone other than the company tied to the premises number.

Company name (alternate recipient) _____ Contact name _____

Address _____ City _____ State _____ ZIP _____

Customer signature _____ Date _____

Equipment supplier

Vendor name _____ Contact name _____

Address _____ City _____ State _____ ZIP _____

Phone _____ Fax _____ Email* _____

*By providing your email address, you are granting Xcel Energy permission to send further emails regarding our programs and services.

INTERNAL USE ONLY – DO NOT WRITE IN THIS SECTION Business group: BSC Account manager

Account manger /BSC representative _____ Project Number _____

Customer is an Xcel Energy Electric customer Gas customer Electric and gas customer

Electric premises number: Natural gas premises number:

Note: Both natural gas and electric premises numbers are required for natural gas and electric customers.

Customer's electric rate code _____ Primary Secondary

Customer's natural gas rate code _____ Note: list only the gas rate code for this equipment

ISOC Customer Yes No

If yes, contract firm demand: _____ Advance notice: _____ Controllable hours: _____

Part 1 – Project information

Describe project including detail of energy savings measure (please attach proposal):

Expected completion date _____

Please answer each question

Yes	No	
		Is the existing equipment operational?
		Is this EMS for a building currently being designed? If yes, then our EDA program may be applicable.
		Is this system replacing an existing pneumatic control system?
		Is this project adding functionality to an existing system?
		Is this system replacing an existing DDC system that is functioning, but obsolete? If yes, identify additional savings.
		Is this project repairing, re-programming or enhancing an existing EMS? If yes, then our Recommissioning program may be applicable.
		Is this project controlling manufacturing or industrial processes or refrigeration equipment?
		Was the project identified in a recommissioning study funded by Xcel Energy?

For heating, the controlled space uses:

- Xcel Energy gas
 Transport (other provider) gas
 Electricity
 Both gas and electricity

Part 2 – Project costs

Item	Cost
Engineering	\$
Materials	\$
Hardware/software	\$
Labor	\$
Taxes/freight (if any will be invoiced)	\$
Optional items – extra graphical or diagnostic software; fire detection, security, etc.	\$
TOTAL	=

Part 3 – Building information

Building square footage _____ Year built _____

Square footage to be controlled _____

- Type of facility**
 School/higher education
 Data center
 Grocery
 Office
 Retail
 Warehouse
 Hospital
 Other

Part 4 – HVAC equipment information - equipment to be controlled

Ventilation — Important: this section is for ventilation without heat. Describe any AHUs/RTUs with heat in Heating section.

Unit	Qty.	Description	HP
AHU/RTU #			
AHU/RTU #			
AHU/RTU #			
Exhaust fan #			
Exhaust fan #			

Cooling*

Unit	Qty.	Description	Tons	kW/Ton
Chiller #				
Chiller #				
Condensing unit #				
Condensing unit #				
Heat pumps				
Heat pumps				

*Typical Existing Cooling Systems
 kW/Ton Without Auxiliaries
 Reciprocating (Dx) 1.3-1.7 kW/Ton
 Screw 1.2-1.3 kW/Ton
 Centrifugal 0.5-0.8 kW/Ton
 kW/ton = 12/EER

Heating

Unit	Qty.	Description	kW/Unit	Input BTUH
Heating unit #				
Heating unit #				
Heating unit #				
Heat pumps				
Heat pumps				
Heat pumps				
AHU/RTU with heat				
AHU/RTU with heat				

Water pumps

Unit	Description
Hot water pump #	
Hot water pump #	
Hot water pump #	
Chiller water pump #	
Chiller water pump #	

Lighting

Unit	Watts

Proposed controls

Check all that apply to the proposed system and specify temperatures when requested. For any items that are operational in the existing system, check the "existing" box to the right of the item.

- Unoccupied space temperature setback during winter heating months ____ °F Setback Existing
- Unoccupied space temperature setup during summer cooling months ____ °F Setup Existing
- Hot water temperature reset (Outdoor reset control) ____ °F Reset Existing
- Chilled water temperature reset during spring and fall months when cooling loads are light ____ °F Reset Existing
- Condenser water temperature reset ____ °F Reset Existing
- Discharge air temperature reset during spring, fall and winter months to reduce terminal reheat ____ °F Reset Existing
- Outside air optimization with minimum outside air damper adjustment* Existing
- Outside air optimization with carbon dioxide sensors* Existing
- Prevention of simultaneous heating and cooling Existing
- New temperature and humidity sensors Existing
- Conversion of VAV Boxes from local pneumatic control to electronic (DDC) EMS control. Existing

Please specify:

- Total number VAV boxes _____ Existing
- Number of VAV w/ hot water reheat (gas) _____ Existing
- Number of VAV boxes w/ electric reheat _____ Existing
- Fan operating hours per year _____ Existing

*Adding outside air optimization can result in summer time kW reduction that may improve your project payback.

Demand Limiting Strategy

Set as _____ kW and controlling the following equipment:

PART 5 – Building temperature set points: Temperature controls for space setup/setback

Specify building temperature set points for:

		Existing system*		Proposed system	
		Summer	Winter	Summer	Winter
Occupied		<input type="text" value="°F"/>	<input type="text" value="°F"/>	<input type="text" value="°F"/>	<input type="text" value="°F"/>
Unoccupied		<input type="text" value="°F"/>	<input type="text" value="°F"/>	<input type="text" value="°F"/>	<input type="text" value="°F"/>

*Describe any system deficiencies that prevent current set points from being achieved.

Part 6 – HVAC, lighting and other electrical equipment - existing and proposed operating hours (run time reduction)

Complete this section if the proposed system will reduce operating hours of HVAC, Lighting Systems and Electrical Equipment.

	Existing operating hours				Proposed operating hours			
	Occupied		Unoccupied		Occupied		Unoccupied	
Equipment	Mon – Fri	Sat & Sun	Mon – Fri	Sat & Sun	Mon – Fri	Sat & Sun	Mon – Fri	Sat & Sun
HVAC								
LIGHTING								
OTHER ELECTRICAL EQUIP.								

Rules and requirements

Customer qualifications

- Rebates are available to Xcel Energy electric and natural gas business customers in Colorado only.
- Projects submitted for review should be for facilities with annual energy consumption of at least 80,000 kWh or 750 Dth.
- Gas transport customers are not eligible for gas rebates.
- EMS projects consist of new or upgraded integrated controls systems.

How to apply and receive your rebate

1. Contact your Xcel Energy account manager or call the energy efficiency specialists 855.839.8862.
2. Submit your application and vendor proposal to your Xcel Energy representative.
3. Obtain preapproval from Xcel Energy, and then proceed with your project. Preapprovals are typically issued within 10 calendar days (as long as all information is provided to analyze the project).
4. Contact your Xcel Energy representative after you have completed your project to verify that your project is installed and operational.
 - Provide copies of project invoices, including all controls equipment and installation labor.
6. Upon receipt of your project completion, allow up to eight weeks to receive your rebate check.

Program requirements and guidelines

- Please include vendor’s project proposal or statement of work that describes proposed equipment and changes to the system.
- Please provide vendor or customer savings estimates. If the savings estimates show a 10% difference from the Company’s savings analysis, the Company will offer the opportunity to discuss the calculations with the customer/vendor.
- The Xcel Energy EMS program offers rebates of up to \$600/kW (using and implied kW calculation method) and \$4/Dth. EMS projects might qualify for additional rebates on a promotional basis.
- Preapproval is required before equipment purchase to be eligible for a rebate. The Xcel Energy preapproval date must be before any/all purchase order dates, equipment order dates, equipment ship dates and invoice dates.
 - The customer may incur engineering costs prior to our preapproval date to identify implementation alternatives. Please notify Xcel Energy of these costs prior to our preapproval analysis so we can include the itemized costs in our analysis.
- Preapproval letters are valid for two years from preapproval date stated on the letter. After this time, the customer must contact their Xcel Energy representative to determine if the project will qualify for another year. Please note that project qualification parameters are subject to change.

Program requirements and guidelines cont'd

- Projects might need to be reanalyzed to verify if they still qualify for a rebate if any of the following changed (notify your Xcel Energy representative):
 - Customer's rate structure changes
 - Completed project cost varies by 10% from estimate used in preapproval analysis
 - Installation of project is greater than two years from preapproval date
 - Manufacturer of equipment changes
 - Project scope, operating hours, quantities or cost breakout changes.
- Customers are responsible for ensuring that equipment installed for this program meets all applicable codes, standards and regulatory requirements.
- Energy management system projects must meet all other guidelines of the Custom Efficiency program.
- Stand-alone control systems (i.e., thermostats and process controls) are not eligible for the EMS program, but may be eligible under the Custom Efficiency program.
- EMS rebates are not available for new construction, but projects may be eligible through our Energy Design Assistance program.

Xcel Energy rebate program rules

- Customer signature for EMS application should be the person financially responsible for the project.
- Xcel Energy will issue rebates in the form of checks, not utility bill credits.
- Rebates apply to new equipment only. Used equipment does not qualify.
- Rebate qualifications do not imply any representation or warranty by Xcel Energy of such equipment, design or installation. Xcel Energy shall not be responsible or liable for any personal injury or property damage caused by the equipment.

- Notifications related to program changes and continuation will be posted on our Internet site. The customer is responsible for verifying program parameters:
 - Call energy efficiency specialists at **855.839.8862**
 - Visit **xcelenergy.com** or
 - Email to **energyefficiency@xcelenergy.com**
- Xcel Energy reserves the right to:
 1. Perform pre- and post-installation energy testing or to request customer to provide energy savings verification, such as trend logs or other outputs from their energy management system.
 2. Verify equipment installation and operation.
 3. Adjust rebate amount to correct incentive calculations; deny or request a return of rebate amount if Xcel Energy finds that the application does not comply with Xcel Energy rules and qualifications.
 4. Conduct a random audit of your project before or after issuing a rebate. Please note the following:
 - Audits may be performed up to one year after the rebate has been received by the customer.
 - The customer agrees to provide reasonable access to inspect the installation.
 5. Publicize your participation in this program, unless you specifically request otherwise.
- Fraudulent submission of this form may result in prosecution for mail fraud pursuant to 18 USC sections 1341, 1342.

Project verification – complete the following AFTER project completion and installation.

Once the project is installed and operational, the Xcel Energy representative will verify the installation and include a copy of the invoice(s) from the customer. The customer must also provide a printout of controlled set points, schedules, etc. for installation verification.

Customer signature _____ Date _____

By signing here, I confirm that this project is installed and operational.

Project number _____ Account manager signature _____ Date _____

The Xcel Energy account manager's signature above verifies that the installation is complete and copies of the project invoice(s) from the customer are attached. If the application and installation are complete, Xcel Energy will issue a rebate.

Rebate operations

Signature _____ Date _____

Date sent to rebate processing _____

