

**Instructions:**

1. Heat Pump Water Heater must be installed according to the requirements specified within the Smart Energy Existing Homes Program Guidelines (e.g. ENERGY STAR qualified, installed in an unconditioned space, etc.).
2. Heat Pump Water Heater must replace an existing electric Water Heater. Rebates are not available for fuel switching (e.g. switching from a gas system to an electric system).
3. Santee Cooper must receive a completed copy of this form, as well as all required supplemental documentation prior to release of a loan and/or rebate payments and thirty (30) business days after the equipment is installed. Scheduling of final inspections, if applicable, shall be contingent upon the notification of completion of all essential home improvements and submittal of all required documentation.
4. All data must be properly recorded and submitted by the technician. NOTE: Incomplete information cannot be processed under the Smart Energy Existing Homes Program.
5. The technician must sign this form.
6. Maximum of three (3) Heat Pump Water Heater rebates per residence.
7. All necessary documents and information must be submitted no later than November 30, 2024.

\* Note: Contractors installing Water Heater must have a South Carolina Plumbing Contractor's License.

**Step 1**

**Contractor Information**

Contractor Name	Installation Technician's Name (print)
Contractor Phone Number	Date of Start-Up
South Carolina Plumbing Contractor's License Number	

**Step 2**

**Customer Information**

Customer Name	Customer Phone Number		
Street Address	City	State	Zip
Electric Meter Number / Meter Base		Year House was Built	

**Step 3**

**System Information**

Equipment Selection Information					
Unit No.	Energy Factor	Capacity (Gallons)	Manufacturer	Model Number	Serial Number
1					
2					
3					

Equipment Selection Information				
Unit No.	Location of Equipment	Installation Room Size (feet)	Installation Clearances	Installation Checklist
1	<input type="checkbox"/> Garage <input type="checkbox"/> Attic <input type="checkbox"/> Basement <input type="checkbox"/> Other (please explain):	Length _____ x width _____ x height _____ = _____ cu. ft.	Air Inlet Side (ft.) _____ Air Outlet Side (ft.) _____ Back (in.) _____ Front (ft.) _____ Top (in.) _____	<input type="checkbox"/> There is adequate clearance to remove the air filter. <input type="checkbox"/> Installation complies with code and manufacturer specifications. <input type="checkbox"/> Condensate line drains at a slope to a drain or exterior. <input type="checkbox"/> Temperature and pressure relief valve is properly installed and not plugged. <input type="checkbox"/> Homeowner is aware of cooling effect and noise levels to expect in installation area. <input type="checkbox"/> Homeowner understands maintenance requirements. <input type="checkbox"/> Homeowner understands the safety instructions.
2	<input type="checkbox"/> Garage <input type="checkbox"/> Attic <input type="checkbox"/> Basement <input type="checkbox"/> Other (please explain):	Length _____ x width _____ x height _____ = _____ cu. ft.	Air Inlet Side (ft.) _____ Air Outlet Side (ft.) _____ Back (in.) _____ Front (ft.) _____ Top (in.) _____	<input type="checkbox"/> There is adequate clearance to remove the air filter. <input type="checkbox"/> Installation complies with code and manufacturer specifications. <input type="checkbox"/> Condensate line drains at a slope to a drain or exterior. <input type="checkbox"/> Temperature and pressure relief valve is properly installed and not plugged. <input type="checkbox"/> Homeowner is aware of cooling effect and noise levels to expect in installation area. <input type="checkbox"/> Homeowner understands maintenance requirements. <input type="checkbox"/> Homeowner understands the safety instructions.
3	<input type="checkbox"/> Garage <input type="checkbox"/> Attic <input type="checkbox"/> Basement <input type="checkbox"/> Other (please explain):	Length _____ x width _____ x height _____ = _____ cu. ft.	Air Inlet Side (ft.) _____ Air Outlet Side (ft.) _____ Back (in.) _____ Front (ft.) _____ Top (in.) _____	<input type="checkbox"/> There is adequate clearance to remove the air filter. <input type="checkbox"/> Installation complies with code and manufacturer specifications. <input type="checkbox"/> Condensate line drains at a slope to a drain or exterior. <input type="checkbox"/> Temperature and pressure relief valve is properly installed and not plugged. <input type="checkbox"/> Homeowner is aware of cooling effect and noise levels to expect in installation area. <input type="checkbox"/> Homeowner understands maintenance requirements. <input type="checkbox"/> Homeowner understands the safety instructions.

#### Step 4

#### Quality Assurance Agreement

I hereby certify that I am a South Carolina licensed plumbing contractor and have completed the installation or replacement of HVAC equipment in accordance with the manufacturer's guidelines and Program requirements and have complied with all permitting requirements, as applicable. The information provided in this form is accurate and complete. I understand that Santee Cooper requires this form to be fully completed and all required documentation submitted in order to process related loans and/or rebate requests.

Technician Signature and Printed Name \_\_\_\_\_ Date \_\_\_\_\_

#### Send Completed Form to:

Mail: Santee Cooper Energy Support Services  
 305A Gardner Lacy Rd  
 Myrtle Beach, SC 29579

Email: [residential.energy@SanteeCooper.com](mailto:residential.energy@SanteeCooper.com)

Please enter in email subject line – **SECURE: Heat Pump Water Heater Rebate**

## Step 5 Terms and Conditions

Santee Cooper is implementing a Smart Energy Existing Homes program ("Program") to provide qualifying Customers ("Customers") with rebates to facilitate the installation of energy-efficient equipment, products, upgrades and services at their existing residential facilities. These Terms and Conditions set forth the participation requirements for Customers applying for rebates through the Program. By signing below, the Customer named in the Rebate Application ("Customer") is agreeing to comply with and be bound by these terms.

Santee Cooper has contracted with and authorized Resource Innovations, Inc. ("Resource Innovations") to assist with this Program as needed to include, but not limited to the following activities: facilitating project information requests from Customers and Trade Allies and offering technical support to Santee Cooper and conducting measurement and verification activities.

**Trade Allies.** Customers are required to use a vendor or installer who is a member of Santee Cooper's Residential Trade Ally network ("Trade Ally") for the purchase and installation of all the energy-efficiency measures offered by the Program, except Heat Pump Water Heaters and Smart Thermostats. Contractors installing heat pump water heaters must have a South Carolina Plumbing Contractor's License. Trade Allies are independent contractors with respect to the Program and are not authorized to make representations or incur obligations on behalf of Santee Cooper. Participation as a Trade Ally does not constitute an endorsement by Santee Cooper, nor does it certify or guarantee the quality of work performed. A listing of Trade Allies is available online at [www.santeecooper.com/ResidentialTradeAlly](http://www.santeecooper.com/ResidentialTradeAlly).

**Program Funding.** The 2024 Program Year runs from December 1, 2023 to November 30, 2024. Program funds are limited and rebates are subject to funding availability. Rebate applications are accepted on a first-come, first-served basis until the conclusion of the Program term, or until Program funds are no longer available. Customers requesting rebates after all available Program funding for the Program term is committed will be offered the option to be placed on a waiting list in the order that the applications are received by Santee Cooper for consideration should the Program term be extended or additional funding becomes available.

**Customer and Measure Eligibility.** To be eligible for the Program, applicants must meet the customer and equipment eligibility requirements as set forth in the Santee Cooper Smart Energy for Existing Homes Program Manual ("Program Manual") incorporated herein by reference. Customer must be the owner of the home or be authorized by the owner(s) to implement the Program qualifying upgrades and installations. Customers who have received rebates through the Program for eligible measures are not eligible to receive rebates related to those measures through any other program for the period specified in the *Measure Ineligibility Periods* table as provided in the Program Manual.

**Program Participation Process.** Customer must complete the Program participation process as outlined in more detail in the Program Manual. This process includes, but is not limited to, Customer complying with the following:

1. Customer must use a Trade Ally to purchase and complete the installation of qualifying measures offered by the Program, with the exception of Heat Pump Water Heaters and Smart Thermostats
2. Customer must complete and submit the Rebate Application and all required documentation (collectively the "Rebate Application") within 30 business days after the measures are installed or completed in order to be eligible for rebates. The Rebate Application is incorporated herein by reference.

**Rebate Application.** Customers applying for measures installed during the 2024 Program year must submit the Rebate Application and required documentation by November 30, 2024 and in accordance with Program requirements. Please see the Program Manual for details regarding required documentation. Customer understands that submission of an application, even if correct and complete, does not guarantee payment of rebates.

**Rebate Payments.** Rebates for the implementation of the qualifying equipment are listed in the *Rebate Estimator* table of this Rebate Application and in the Program Manual. Rebate payments are one-time only. Eligible project costs are defined as the actual costs incurred by the customer for the evaluation, construction, installation, implementation, and commissioning of eligible energy-efficiency measures. Rebates will be in the form of a check and made out to customer and will be mailed within two to three weeks after the final approval of the customer's rebate application. Payment of the final V1.2024 - (12/01/2023)

rebate amount is based on Santee Cooper's approval of installed measures and Customer meeting all eligibility and Program requirements. Customer understands that he/she is responsible for paying the Trade Ally any fees associated with installing the qualifying energy-efficiency measures and that Santee Cooper has no part in any agreement between Customer and the Trade Ally which Customer selects to complete the work.

**Inspections.** As part of the Rebate Application review process and for up to two (2) years after a rebate payment, Santee Cooper may request additional documentation and conduct any site inspection activities necessary to confirm eligibility. Failure to provide or complete any of the requested information or program requirements may result in the return of the Rebate Application and denial of rebates through the Program. The site visit is not a safety review and is not intended for any other purposes than verifying equipment rebate eligibility. Customer agrees to cooperate and provide Santee Cooper, or its designated agents access to the equipment, upgrades and meters for as long as the equipment or upgrades are installed. Customer will provide any requested information relating to the facilities, systems, and installed equipment or upgrades, as requested by Santee Cooper to allow for verification of compliance with Program terms, accuracy of project documentation, and for verification of energy consumption. In the case of a rented or leased residence, Customer certifies that he/she has obtained appropriate permission from the building owner(s).

**Tax Liability.** Customer acknowledges that receipt of any rebate pursuant to the Terms and Conditions may result in taxable income to the Customer, even if Customer does not directly receive a payment, and that Customer is solely responsible for payment and reporting with respect to Customer's taxes. Customer should consult his or her own tax advisor with respect to the tax treatment of rebates provided pursuant to the Terms and Conditions. Nothing in these Terms and Conditions is intended to constitute tax advice and cannot be used for the purpose of avoiding penalties under the Internal Revenue Code.

**Customer Information.** By signing the Rebate Application, Customer authorizes and acknowledges that Santee Cooper may duplicate, disseminate, release and disclose Customer's information relating to Customer's Rebate Application (including the entirety of its contents), and any other information related to the Customer's participation in the Program, including but not limited to account information and billing data, energy usage, and tax identification numbers to Resource Innovations and Trade Allies, and any other third party, as applicable, utilized by Santee Cooper for the purposes of processing the Rebate Application, to verify or audit Program records or system installation, operation and results, or as required to comply with state and/or federal law, fraud prevention, regulation, and other legal action; in those cases, Santee Cooper and its subcontractors shall comply with all legal requirements of the jurisdiction of the individual whose Customer data would be disclosed before making such disclosure.

**Project Installations.** Customer acknowledges that while the Program may provide rebates for the installation of qualifying equipment and upgrades, neither Santee Cooper nor Resource Innovations will install any equipment. Customer is solely responsible for the selection of equipment/upgrade to be installed and for the selection of a Trade Ally to complete the installation or service of equipment. Customer acknowledges that responsibility for delivery and workmanship related to any equipment or services the Customer procures with a Trade Ally or third-party installer exclusively rests with that Trade Ally or third-party installer. Santee Cooper shall be entitled to rely upon said documentation and certification and shall have no duty to independently verify that the Trade Ally meets all program requirements.

**Fraud.** Customer represents and warrants that he/she is eligible and authorized to participate in the Program, and that Customer's participation in the Program will not result in the violation or breach by Customer of law, Customer's contractual obligations, or other duties to or rights of any third party. Any person who knowingly files an application containing any materially false information or who purposely or misleadingly conceals information subjects such person to criminal and civil penalties. Any and all funds determined to have been acquired on the basis of inaccurate or fraudulent information must be returned to Santee Cooper. This section shall not limit other remedies that may be available for the filing of a false or fraudulent application, including, but not limited to, referral to law enforcement authorities.

**No Warranties.** SANTEE COOPER AND RESOURCE INNOVATIONS DO NOT MAKE ANY WARRANTIES, AND BOTH SANTEE COOPER AND RESOURCE INNOVATIONS EXPRESSLY DISCLAIM ALL WARRANTIES OR REPRESENTATIONS OF ANY KIND WITH RESPECT TO THE DESIGN, MANUFACTURE, CONSTRUCTION, SAFETY, PERFORMANCE OR EFFECTIVENESS OF ANY POTENTIAL ENERGY SAVINGS, EQUIPMENT INSTALLED, AND/OR SERVICES RENDERED BY ANY PERSON OR ENTITY IN CONNECTION WITH THE PROGRAM. SANTEE COOPER AND RESOURCE INNOVATIONS DISCLAIM ALL WARRANTIES, EXPRESS OR IMPLIED, TO THE MAXIMUM EXTENT PERMITTED UNDER LAW, WHETHER STATUTORY OR OTHERWISE, INCLUDING WITHOUT LIMITATION ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

Responsibility for delivery and workmanship related to any materials or equipment that participant procures under the rebate program exclusively rests with participant, contractor or other third party. Neither Santee Cooper nor Resource Innovations assumes any responsibility for the representations, warranties or guarantees with respect to the quality, design, manufacture, construction, safety, performance, installation, or effectiveness of the equipment or oversight of contractor services utilized by participant. Neither Santee Cooper nor Resource Innovations guarantees that installation and operation of the equipment will result in reduced energy usage or cost savings.

**Limitation of Liability.** Notwithstanding anything in these Terms and Conditions and to the fullest extent allowed by law, Santee Cooper, Resource Innovations and their respective employees' total liability, regardless of the number of claims, is limited to the amount of the rebate payment approved in accordance with the Program Terms and Conditions, and Santee Cooper, Resource Innovations and its affiliates and their respective directors, employees, contractors, agents, and service providers shall not be liable to the Customer or any other party for any other obligations.

Notwithstanding anything in these Terms and Conditions to the contrary, Santee Cooper, Resource Innovations and their respective directors, officers, employees and/or agents shall not be liable hereunder for any type of damages, whether indirect, incidental, consequential, exemplary, reliance, punitive or special damages, including damages for loss of use regardless of the form of action, whether in contract, indemnity, warranty, strict liability or tort, including negligence of any kind.

**Indemnification.** Participant will indemnify and hold harmless Santee Cooper and its affiliates, subsidiaries, joint ventures, officers, directors, employees, agents (including Resource Innovations), successors, and assigns (collectively the "Indemnified Parties") from and against all liability

claims

and demands, including any damages, losses, liabilities or expenses (including without limitation court costs and reasonable attorneys' fees) which arise as a result of the Participant's action or inaction which relates in any way to this Rebate Program, including the submission of fraudulent rebates. Notwithstanding the foregoing, this indemnification is in addition to any indemnity and/or insurance obligations between the Participant and the Indemnified Parties.

IN NO EVENT SHALL THE INDEMNIFIED PARTIES BE LIABLE TO PARTICIPANT FOR ANY CONSEQUENTIAL, INCIDENTAL, PUNITIVE, OR DIRECT DAMAGES, INCLUDING LOST PROFITS, ARISING FROM OR OTHERWISE IN CONNECTION WITH THIS REBATE PROGRAM.

**Compliance with Law.** Customer, at its own expense, is responsible for meeting all requirements and complying with all local and state laws, rules and codes concerning the Program, including without limitation, the installation and maintenance of eligible equipment. Trade Ally shall, at its own expense, obtain and maintain licenses and permits needed to install eligible equipment.

**Governing Law.** The laws of the State of South Carolina shall govern the interpretation, validity, and effect of these Terms and Conditions, the parties' performance thereunder, and all matters incident thereto. Any legal action associated with the Program must be initiated with any South Carolina circuit court of competent jurisdiction.

**Program Changes.** Santee Cooper reserves the right to change or cancel the Program or its Terms and Conditions at any time without notice. Preapproved applications, for which the Customer has completed the required Program requirements, will be processed to completion under the Terms and Conditions in effect at the time of the pre-approval by Santee Cooper. The Terms and Conditions may be terminated by Santee Cooper, Resource Innovations or Customer at any time without cause.

**Entire Agreement.** The terms set forth herein, including all attachments and incorporated references, constitute a complete statement of the Terms and Conditions applicable to the Program and supersede all prior representations or understandings, whether written or oral. Santee Cooper and Resource Innovations shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind that is not set forth herein. To the extent there is any conflict between the language of the Program Manual and these Terms and Conditions, these Terms and Conditions shall prevail.

## Acceptance of Terms and Conditions

By signing below, I certify that:

1. I have read, understand, and agree to be bound by and comply with the terms set forth herein and such other terms as set forth in the Program Manual.
2. The information provided to Santee Cooper in and as part of the Customer Application is accurate and complete and I will notify Santee Cooper immediately of any changes to the information.
3. I have used a licensed contractor, as appropriate per Rebate Program requirements, and have complied with applicable permitting requirements for applicable installations.

Authorized by (please print)

Signature of Authorized

Date

### Send Completed Form to:

Mail: Santee Cooper Energy Support Services  
305A Gardner Lacy Rd  
Myrtle Beach, SC 29579

Email: [residential.energy@santeecooper.com](mailto:residential.energy@santeecooper.com)

Please enter in email subject line – **SECURE: Rebate Application**