



NEW CUSTOMER SIGNATURE AND APPROVAL PROCEDURE

As we adapt to new procedures to protect the health and safety of our Trade Allies, your employees and our customers, we are revising some of the processes associated with our energy efficiency rebate programs. Understanding the need to minimize customer interaction and contact, we have implemented a new approval process for forms that previously required customers to handle paperwork or mobile devices to provide approval via signature.

Effective immediately, the Heating, Cooling and Water Heating (HVAC) program will now enable verbal approvals for all documents that previously required a customer's signature.

This new approval process will eliminate the exchange of paperwork or handling of mobile submission devices between your employees and your customers and allow you to maintain social distancing while performing work in customers' homes.

The following forms are now eligible for a customer to give a verbal approval without having to sign or touch any documents or devices:

- Rebate reassignment
- Certificate of completion
- Mobile submission tools such as Power Rebate and Sightline Mobile Apps

As a Trade Ally you are expected to describe the document that would otherwise be signed and explain to the customer that you are offering alternate approval processes and can proceed with verbal confirmation. To note the verbal approval from the customer, the Trade Ally will now be able to add the word VERBAL in front of your own employee's signature on the signature line.

For Example:

Signature: VERBAL *John Smith*

Please note that rebate reassignments will ONLY be processed if the amount being rebated is clearly discounted on the invoice, which confirms the customer is aware of the upfront benefit they had already received. Submissions that do not meet this requirement will be flawed and follow up will be requested.

If you have questions or need additional assistance, please contact your Account Manager or the HVAC Account Advocate Team.

HVAC Account Advocate Team

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