

Welcome!

We will begin the presentation shortly.

Trade Ally Training

Small Business Direct Install (SBDI)
Business Energy Solutions (BES)
Custom Commercial & Industrial
Home Performance (HP)

2025



Agenda

- Introductions
- Meet the Team
- Why Become a Trade Ally (TA)
- Small Business Direct Install Program (SBDI)
- Business Energy Solutions Program (BES)
- Custom C&I Program (CCIP)
- Home Performance Program (HP)
- Home Performance with Energy Star (HPwES)
- TA Expectations
- TA Resources
- Q/A



Appalachian Power Program Management

Home Performance and SBDI Programs



Danielle Catron
EE & Consumer Programs Coordinator
Phone: 540-985-2988
Email: pdcatron@aep.com

BES and Custom Programs



Malcolm Saunders
Associate EE & Consumer Programs Coordinator
Phone: 304-792-2328
Email: ssaunders@aep.com

TRC Program Implementation Team



Deborah Hill
Program Manager



Fran Phillips
Operations Manager



Peter Hynson
Project Engineer III



Todd Ewald
Commercial Account Manager



Kaleigh Mason
Commercial Account Manager



Kennedy Nwabia
Commercial Account Manager

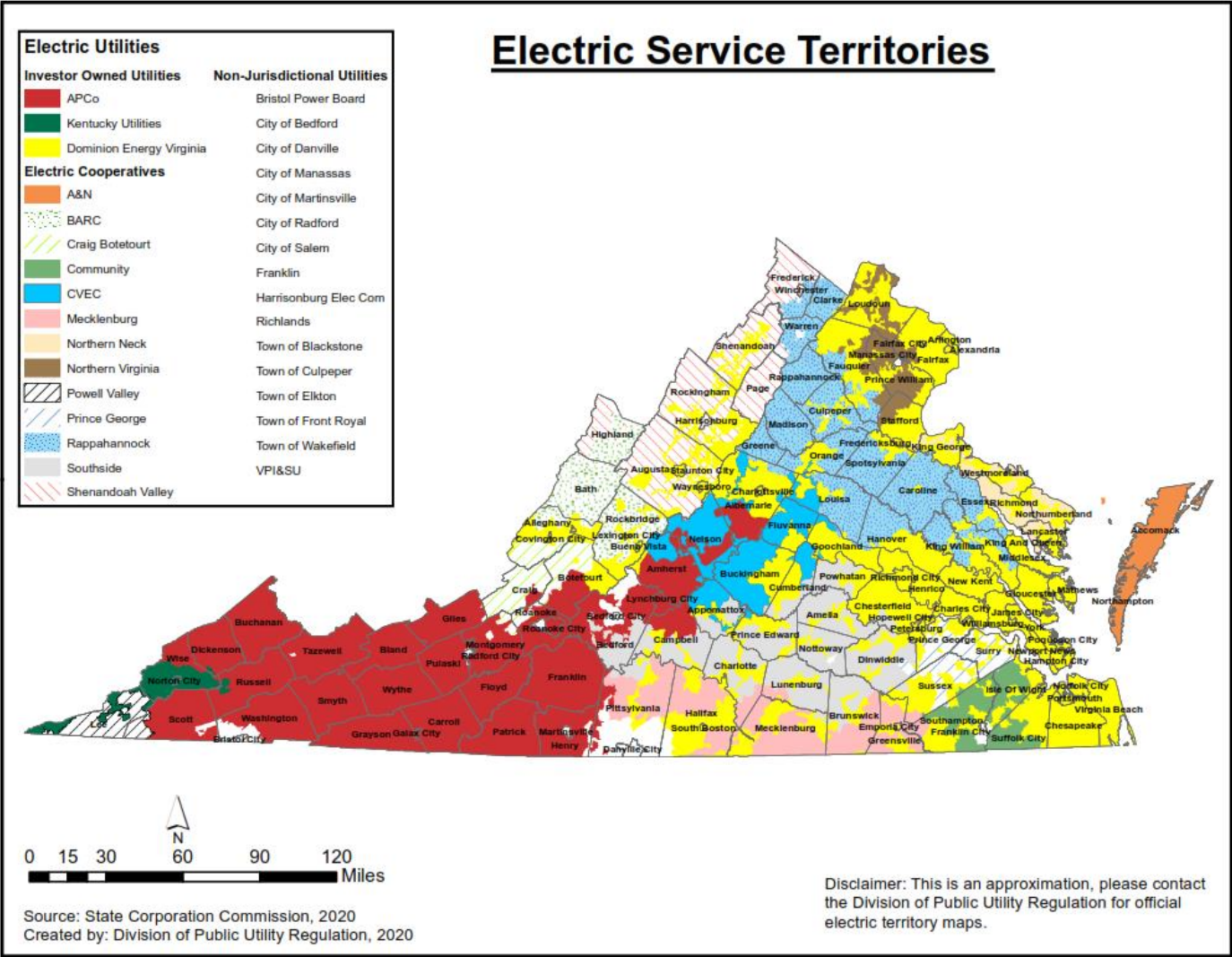


Jeff Lineberry
Residential Account Manager

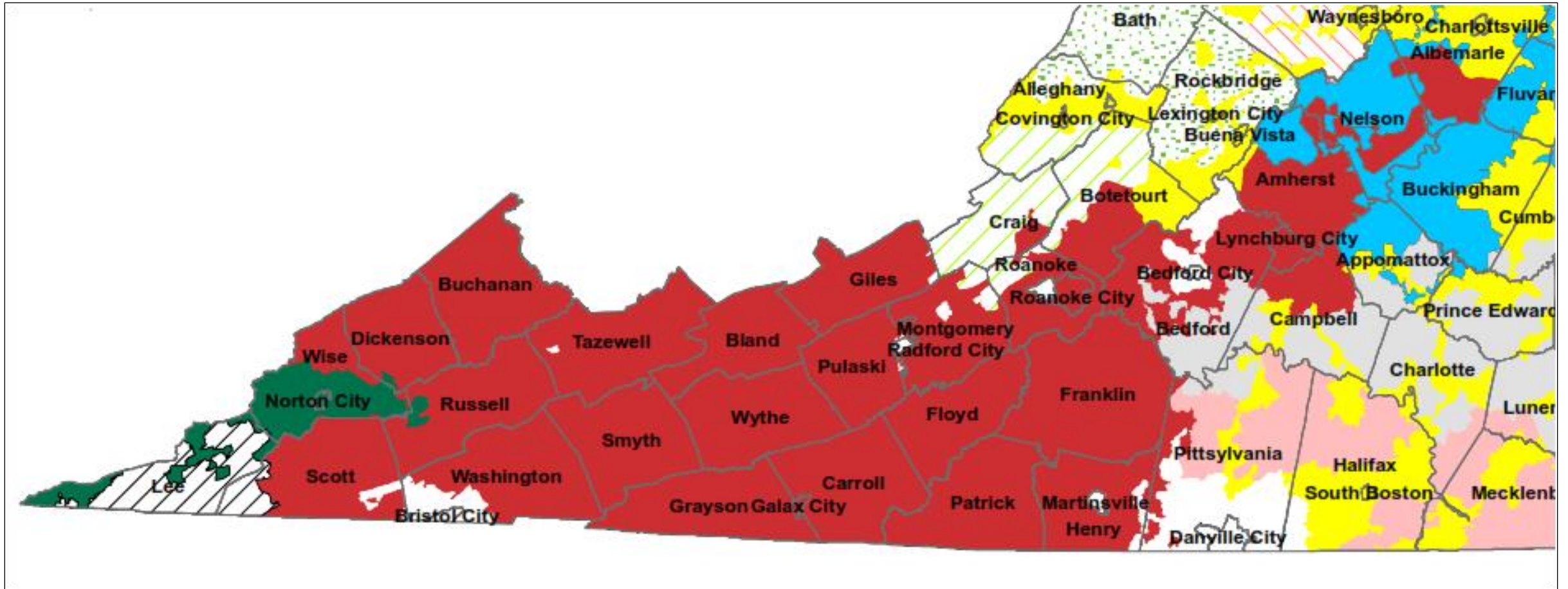
Trade Ally Relationship Chart



Coverage Area Map



Coverage Area Map (cont.)



Why Become a Trade Ally?

By becoming a Trade Ally with Appalachian Power and the TakeCharge VA programs, you will be on a list of professionals that residential and business customers can call to get updates to their homes or business facilities.

Program Benefits

- Increased Exposure
 - Access to a broad base of customers eager to engage in energy efficiency projects for their businesses.
- The Potential for Business Growth
 - Opportunities to expand your services and increase your market reach.
- Support & Resources
 - Availability of marketing materials and technical resources to help you along the way.



An AEP Company

TAKE CHARGE™
VIRGINIA

Small Business Direct Install Program



SBDI Overview

Program Benefits

- Cost-effective energy efficiency measures to small businesses
- Small business owners save money and lower energy use.
- Easy upgrades reduce operating costs and maintenance
- Can improve productivity by providing a more comfortable work environment.
- Direct install measures = immediate savings
- Quick Energy Checkup (QEC), a no cost walk-through to identify energy and cost-saving opportunities

Program Eligibility

- Commercial customers with a peak demand of 200 kW or less are eligible except for:
Public Authority and Commonwealth of Virginia governmental customers
- Work must be completed by an approved Trade Ally



TAKE CHARGE™
VIRGINIA

TakeChargeVA.com



TAKE CHARGE™

Small Business Direct Install Program



INCENTIVES

Appalachian Power offers cash incentives for energy efficiency improvements, in addition to reliable electric service at a reasonable cost and can help your small business grow. You can boost your bottom-line while getting free quick energy efficiency upgrades and rebates for larger projects that improve your space.

Incentives are available for various projects, including:



LIGHTING



PRE-RINSE
SPRAYERS



PIPE
INSULATION



KITCHEN
EQUIPMENT

Get started today!

TakeChargeVA.com

Small Business Direct Install Program

2024 Incentive Guide

TakeChargeVA | Small Business
Direct Install



TAKE CHARGE™
VIRGINIA

SBDI Lighting

Lighting	Description	Incentive
Screw-in Omnidirectional¹	LED, Bug, Marine, Infrared: <1,500 lumens	\$5 per lamp
	LED, Bug, Marine, Infrared: 1,500 or above	\$8 per lamp
Screw-in Directional¹	LED R20 Short (450-750 lumens)	\$4 per lamp
Screw-in Decorative¹	LED Decorative (Shapes B, BA, C, CA, DC, F, G, any base, <310 lumens)	\$3 per lamp
	LED Globe (any base, <310 lumens)	\$3 per lamp
	LED Globe (any base, G8, G11, G12)	\$8 per lamp
Pin-based¹	LED Pin Based: < 1,499 lumens	NEW \$8 per lamp
	LED Pin Based: 1,500-2,999 lumens	NEW \$20 per lamp
	LED Pin Based: 3,000 lumens or above	NEW \$35 per lamp
Troffer Luminaire and Retrofit Kit¹	1x4 Tube or Strip LED Troffer	\$9 per fixture
	1x8 Tube or Strip LED Troffer	NEW \$12 per fixture
	2x2 Tube or Strip LED Troffer	\$9 per fixture
	2x4 Tube or Strip LED Troffer	\$24 per fixture
	2x8 Tube or Strip LED Troffer	NEW \$24 per fixture
	1x4 LED Troffer Retrofit Kit	\$17 per kit
	1x8 LED Troffer Retrofit Kit	NEW \$12 per kit
	2x2 LED Troffer Retrofit Kit	\$17 per kit
	2x4 LED Troffer Retrofit Kit	\$33 per kit
	2x8 LED Troffer Retrofit Kit	NEW \$24 per kit

SBDI Lighting (cont.)

Linear Lamp¹	LED Linear Replacement Lamp: 2ft	NEW	\$4.50 per lamp
	LED Linear Replacement Lamp: 4ft	NEW	\$6.75 per lamp
	LED Linear Replacement Lamp: 8ft	NEW	\$9 per lamp
	LED Linear Replacement Lamp: 2 ft - Controlled by Occupancy Sensor	NEW	\$8 per lamp
	LED Linear Replacement Lamp: 4 ft - Controlled by Occupancy Sensor	NEW	\$12 per lamp
	LED Linear Replacement Lamp: 8 ft - Controlled by Occupancy Sensor	NEW	\$16 per lamp
Exterior Lighting	LED Luminaires: 5,000 - 9,999 Lumens		\$15 per fixture
	LED Luminaires: 10,000 - 19,999 Lumens		\$30 per fixture
	LED Luminaires: 20,000 - 29,999 Lumens		\$50 per fixture
	LED Luminaires: 30,000 - 39,999 Lumens	NEW	\$70 per fixture
	LED Luminaires: 40,000 Lumens or above	NEW	\$90 per fixture
Refrigerated Case Lighting¹	Refrigerated Case Lighting: 4ft- Cooler	NEW	\$33 per fixture
	Refrigerated Case Lighting: 5ft- Cooler	NEW	\$41 per fixture
	Refrigerated Case Lighting: 6ft- Cooler	NEW	\$49 per fixture
Delamping	Delamping	NEW	\$225 per 1000 watts removed
Lighting Controls	Description	Incentive	
Controls	Dual daylight & occupancy sensor	15¢ per watt controlled	
	Daylight continuous dimming control	12¢ per watt controlled	
	Luminaire level lighting control - with local or cloud server	18¢ per watt controlled	

SBDI Non-Lighting

Kitchen	Description	Incentive
Pre-Rinse Spray Valve ²	Pre-Rinse Spray Valve 1.6 GPM: Electric Water Heating: Full Service Restaurant	\$54 each
	Pre-Rinse Spray Valve 1.6 GPM: Electric Water Heating: Limited Service (fast food) Restaurant	\$54 each
	Pre-Rinse Spray Valve 1.6 GPM: Electric Water Heating: Other Facility	\$54 each
	Pre-Rinse Spray Valve 1.28 GPM: Electric Water Heating: Full Service Restaurant	\$100 each
	Pre-Rinse Spray Valve 1.28 GPM: Electric Water Heating: Limited Service (fast food) Restaurant	\$100 each
	Pre-Rinse Spray Valve 1.28 GPM: Electric Water Heating: Other Facility	\$100 each
	Pre-Rinse Spray Valve 1.15 GPM: Electric Water Heating: Full Service Restaurant	\$200 each
	Pre-Rinse Spray Valve 1.15 GPM: Electric Water Heating: Limited Service (fast food) Restaurant	\$200 each
	Pre-Rinse Spray Valve 1.15 GPM: Electric Water Heating: Other Facility	\$200 each
Commercial Hot Food Holding Cabinet ²	Commercial Hot Food Holding Cabinets: 0 < Volume < 13CF	NEW \$200 each
	Commercial Hot Food Holding Cabinets: 13 ≤ Volume < 28CF	NEW \$400 each
	Commercial Hot Food Holding Cabinets: Volume ≥ 28	NEW \$600 each
Commercial Griddle ²	Electric Commercial Griddle	NEW \$700 each
Commercial Fryer ²	Electric Fryer: Standard Size	NEW \$230 each
	Electric Fryer: Large Vat	NEW \$230 each
Commercial Steam Cooker ²	Steam Cooker: Steam Generator Baseline	NEW \$1,300 each
	Steam Cooker: Boiler Based Baseline	NEW \$1,300 each

SBDI Non-Lighting (cont.)

Refrigeration	Description	Incentive
Vending Machine Controls ³	Vending Machine Control: Refrigerated	\$120 each
	Vending Machine Control: Non Refrigerated NEW	\$25 each
Night Cover ⁴	Night Cover for Vertical Refrigerated Case	\$29 linear foot
Display Case Doors	Display Case Doors on Open Display Cases NEW	\$30 linear foot
Automatic Door Closer	Refrigeration Automatic Door Closer Automatic Door Closer: Cooler NEW	\$125 each
	Refrigeration Automatic Door Closer Automatic Door Closer: Freezer NEW	\$150 each
Controls	Glass Front Refrigerated Cooler Control NEW	\$90 each
	Floating Head Pressure Controls NEW	\$65 ton
	Evaporator Fan Motor Control Walk-in or Reach-in Cooler NEW	\$60 per motor
	Evaporator Fan Motor Control Walk-in or Reach-in Freezer NEW	\$75 per motor
Compressor	Variable Speed Refrigeration Compressor NEW	\$250 ton
Hot Water	Description	Incentive
Water Heater	Hot Water ENERGY STAR Heat Pump Electric Storage Water Heater ≤ 55 Gallons NEW	\$100 each
	Hot Water ENERGY STAR Heat Pump Electric Storage Water Heater > 55 Gallons NEW	\$120 each
Water Heater Setback	Water Heater Setback: Electric	\$5 each
Low Flow Showerhead ⁵	Low Flow Showerhead	\$12 each
Insulation	Description	Incentive
HW Pipe Insulation ⁶	Insulate exposed water heater pipes	\$13 each
Outlet Gasket ⁶	Install insulation gaskets on switch and outlet plates on exterior walls	\$2 per gasket
Reduce Air Infiltration ⁶	Reduce air infiltration using caulk and spray foam	25¢ linear foot

SBDI Non-Lighting (cont.)

HVAC	Description		Incentive
Packaged Terminal Heat Pumps	Packaged Terminal Heat Pumps < 7 kBtu/h	NEW	\$20 unit
	Packaged Terminal Heat Pumps ≥ 7 and < 15 kBtu/h	NEW	
	Packaged Terminal Heat Pumps ≥ 15 kBtu/h	NEW	
Packaged Terminal Air Conditioners	Packaged Terminal Air Conditioners < 7 kBtu/h	NEW	\$15 unit
	Packaged Terminal Air Conditioners ≥ 7 and < 15 kBtu/h	NEW	
	Packaged Terminal Air Conditioners ≥ 15 kBtu/h	NEW	
Vertical Heat Pumps	Single Package Vertical Heat Pumps ≤ 5.4 tons	NEW	\$20 per ton
	Single Package Vertical Heat Pumps > 5.4 and ≤ 11.25 tons	NEW	
	Single Package Vertical Air Conditioners ≤ 5.4 tons	NEW	\$15 per ton
	Single Package Vertical Air Conditioners > 5.4 and ≤ 11.25 tons	NEW	
Air Source Heat Pumps	Air Source Heat Pumps - Split and Single Package ≤ 5.4 tons	NEW	\$20 per ton
	Air Source Heat Pumps - Split and Single Package > 5.4 and ≤ 11.25 tons	NEW	\$25 per ton
	Air Source Heat Pumps - Split and Single Package > 11.25 and ≤ 20 tons	NEW	
	Air Source Heat Pumps - Split and Single Package > 20 tons	NEW	
Air Conditioners	Air Conditioners - Split and Single Package ≤ 5.4 tons	NEW	\$20 per ton
	Air Conditioners - Split and Single Package > 5.4 and ≤ 11.25 tons	NEW	
	Air Conditioners - Split and Single Package > 11.25 and ≤ 20 tons	NEW	
Ductless, Mini Split	Ductless, Mini Split Air Conditioners ≤ 5.4 tons	NEW	\$12 per ton
	Ductless, Mini Split Heat Pumps ≤ 5.4 tons	NEW	\$18 per ton

SBDI Pre-Rinse Spray Valve (PRSV)

Pre-Rinse Spray Valve Incentives

Benefits

- Commercial kitchens can save more than **\$900** annually
- Additionally, you can get up to **\$200** to help with the cost of a new valve

Qualifications

- Facility must use electric hot water
- PRSV must meet GPM requirement

Category	Flow	Incentive	Potential Annual Water Savings	Potential Energy Savings
1	1.6 gpm	\$54	70,000 gallons	\$400- \$700
2	1.28 gpm	\$100	90,000 gallons	\$525- \$825
3	1.15 gpm	\$200	100,000 gallons	\$600- \$900

SBDI New Measures!

Power Strips

- Advance Power Strip: \$2 each

Appliances

- Commercial Ice Machines: \$12 -\$100 based on size
- Vending Machine Control – non-refrigerated: \$25 each

Office Equipment

- ENERGY STAR® Computers: \$10 each
- ENERGY STAR Imaging: \$20 each
- ENERGY STAR Uninterruptable Power Supplier (UPS): \$15/kVA
- Small Network PC Controller: \$30/PC controlled



SBDI New Measures!

Hot Water

- ENERGY STAR Heat Pump Electric Storage Water Heater: \$100 -\$120

HVAC

- Packaged Terminal Heat Pumps: \$20 per unit | Packaged Terminal ACs: \$15 per unit
- Notched V-belts: \$40 each | Synchronous HVAC belts: \$90 each
- Vertical Heat Pumps: \$15 – \$20 per ton
- Air Source Heat Pumps: \$20 – \$25 per ton
- Ductless, Mini Split ACs and Heat Pumps: \$12-18 per ton
- Air Conditioners: \$20 per ton
- HVAC Controls (11 new measures, e.g. hydronic heating pumps between 1HP & 10HP at \$320/hp controlled)
- HVAC Tune-up: \$5.50 per ton

SBDI New Measures!

Lighting

- Lighting Controls: \$0.12 - \$0.18 per Watt Controlled
- Troffer Luminaire and Retrofit kits: \$12 - \$24 per fixture or kit
- Exterior Lighting: \$15 - \$90 per fixture
- Linear Lamps with Occ Sensor or Controls: \$8 -\$16 per lamp

Refrigeration

- Display Case Doors: \$30 per linear foot
- Refrigeration Controls: various
- Automatic Door Closers (freezers/coolers): \$125 -\$150 each
- Variable Speed refrigeration compressor: \$250 per ton



SBDI Incentive

Incentives

- Projects with incentives totaling:
 - > \$1000 must have program pre-approval
 - <\$1,000 will have 30 days after install to submit applications
- \$25,000 annual incentive cap per account



Quick Energy Check-Up (QEC)

SBDI customers participate in the QEC to identify energy and cost saving opportunities. The QEC and select measures are provided to the customer at no cost.

QEC

- Visual inspection identifying energy measures
- Review existing business equipment such as lighting, HVAC, controls, refrigeration and kitchen equipment
- Discuss the customer's energy usage
- Educate the customer on best practices
- Develop a comprehensive work scope based on the QEC
- Identify additional savings

QEC

Company and Site Information

Customer Contact Information

QEC

Trade Ally/Project Contributor

Payee Information

Measures

File Upload

Review and Submit

Quick Energy Check

QEC Submission Date *

Lighting QEC

Add Lighting QEC

Space	Fixture Type	Lighting Type	Qty	Approx. Age	Condition	
<input type="text"/>	Select	LED	0	Select	Select	

Recommendations

Recommended for You

Kitchen and Refrigeration Measures

Install pre-rinse spray valves

Replace worn gaskets on refrigerators or freezers

Install night covers on refrigerators or freezers

QEC

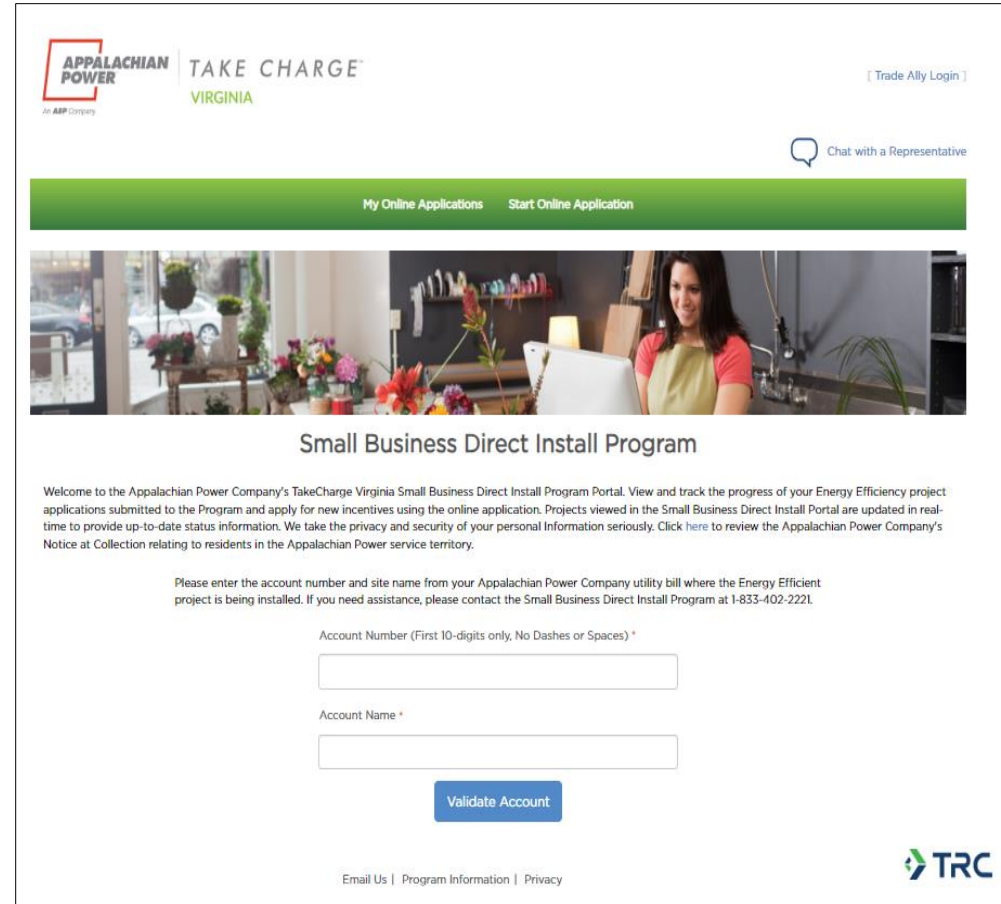
Quality Energy Check (QEC) Audit Information					
Lighting					
Space	Fixture Type	Lighting Type	Quantity	Age	Condition
Heating					
Heating Type		Heating Capacity	Quantity	Age	Condition
Cooling					
Cooling Type		Cooling Capacity	Quantity	Age	Condition
Controls					
Space	Control Type	Control Details	Quantity	Age	Condition
Refrigeration					
Refrigeration Type	Sub Type	Size	Quantity	Age	Condition
Refrigeration					
Fuel Type	Type	Commercial/Industrial	Quantity	Age	Condition

Quality Energy Check (QEC) Audit Recommendations	
No Cost Recommendations	
Open window blinds to allow natural light to fill an area instead of artificial lights	
Check and adjust thermostat's programmable settings	
Activate energy-saving features of computers, monitors and copiers	
Install reminder signs to turn off lights when not in use and in daylighted areas	
Check outdoor light controls for proper operation and settings	
Low Cost Recommendations	
Apply sensors or controls to existing lighting	
Install timers on coffee makers and water coolers	
Install Smart Strips for computer equipment and associated multiple plug-in loads	
Replace worn weather stripping on exterior doors	
Clear blocked supply and return air distribution vents	
Clean or replace air filter and exposed/accessible condenser coils associated with A/C and refrigeration units	
Add external insulation blanket to electric water heater	

SBDI Online Application

Online Application (OLA) Submittal

- Application *must* be submitted by an approved Trade Ally
- Web Portal: [TakeCharge VA | Programs For Your Business](#)
- [TakeCharge VA | Small Business Direct Install Program](#)
 - “Submit Your Application”



The screenshot shows the 'Small Business Direct Install Program' portal. At the top, there are logos for 'APPALACHIAN POWER' (An AEP Company) and 'TAKE CHARGE VIRGINIA'. A 'Trade Ally Login' link is in the top right. Below the logos is a green navigation bar with 'My Online Applications' and 'Start Online Application' links. A chat bubble icon with the text 'Chat with a Representative' is also present. The main content area features a photo of a woman in a shop. Below the photo is the title 'Small Business Direct Install Program'. A welcome message states: 'Welcome to the Appalachian Power Company's TakeCharge Virginia Small Business Direct Install Program Portal. View and track the progress of your Energy Efficiency project applications submitted to the Program and apply for new incentives using the online application. Projects viewed in the Small Business Direct Install Portal are updated in real-time to provide up-to-date status information. We take the privacy and security of your personal information seriously. Click [here](#) to review the Appalachian Power Company's Notice at Collection relating to residents in the Appalachian Power service territory.' Below this is a form with two input fields: 'Account Number (First 10-digits only, No Dashes or Spaces) *' and 'Account Name *'. A blue 'Validate Account' button is positioned below the fields. At the bottom, there are links for 'Email Us | Program Information | Privacy' and the 'TRC' logo.

APPALACHIAN POWER
An AEP Company

TAKE CHARGE
VIRGINIA

[Trade Ally Login]

Chat with a Representative

My Online Applications Start Online Application

Small Business Direct Install Program

Welcome to the Appalachian Power Company's TakeCharge Virginia Small Business Direct Install Program Portal. View and track the progress of your Energy Efficiency project applications submitted to the Program and apply for new incentives using the online application. Projects viewed in the Small Business Direct Install Portal are updated in real-time to provide up-to-date status information. We take the privacy and security of your personal information seriously. Click [here](#) to review the Appalachian Power Company's Notice at Collection relating to residents in the Appalachian Power service territory.

Please enter the account number and site name from your Appalachian Power Company utility bill where the Energy Efficient project is being installed. If you need assistance, please contact the Small Business Direct Install Program at 1-833-402-2221.

Account Number (First 10-digits only, No Dashes or Spaces) *

Account Name *

Validate Account

Email Us | Program Information | Privacy

TRC

SBDI Online Application

Required Supporting Documents

- Project cost estimate (include labor cost, equipment cost, model number(s) and quantity)
 - If project installation is complete at time of application submittal, then upload final invoice instead of cost estimate
- Equipment Specification sheets
- Before Pictures (Pre-Rinse Spray Valve)
- On-site T&C with Customer signature (Pre- Rinse Spray Valve)

Once Installation is Complete

- For final review and approval, *email* program staff the following:
 - After Pictures (Pre-Rinse Spray Valve)
 - Final Invoice (include labor cost, equipment cost, model number(s) and quantity)



SBDI Online Application

Example of an incomplete invoice:

Trade Ally LOGO

Invoice

Date: 8/10/2024

Trade Ally: Name
Address
Phone number / Fax number

Invoice #
123456789

Project Site / Ship To
Company Name
Address
City, State, Zip

Customer
Company Name
Address
City, State, Zip

QTY	Product	Memo	Unit Cost	Amount
1	Electrical	Remove old flood light heads Purchase and installed 5 new flood light heads for Parking and storage area around factory	\$ x.xxx.xx	\$ x.xxx.xx
TOTAL			\$	x.xxx.xx

SBDI Online Application

Example of a complete invoice:

Trade Ally LOGO

Trade Ally: Name
Address
Phone number / Fax number

Project Site / Ship To	
Company Name	
Address	
City, State, Zip	

Project	Project Name
Message	Final Invoice
Terms	
DUE ON RECEIPT	

Invoice

Date: 8/10/2024

Invoice #
123456789

Customer
Company Name
Address

QTY	Product	Memo	Unit Cost	Amount
2	Project Material	TMFL LED 7L W HV DIM 50 BZA	\$ xxx.xx	\$ xxx.xx
18	Project Material	TMFL LED 7L W UNV DIM 50 BZA	\$ xxx.xx	\$ x,xxx.xx
9	Project Material	LBK 4FT 1 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ xxx.xx
115	Project Material	LBK 4FT 2 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ x,xxx.xx
19	Project Material	LBK 4FT 2 4000LMHE 80CRI 50K MVOLT	\$ xx.xx	\$ x,xxx.xx
164	Project Material	LBK 4FT 2 8000LMHE 80CRI 50K MVOLT	\$ xx.xx	\$ x,xxx.xx
2	Project Material	ES40P-A1-17K-4MS-50-80-CL-LV-CRM-QDC-10V	\$ xxx.xx	\$ xxx.xx
3	Project Material	LL-SL1-MD-200WD-50K-F60-HV-G2-BRN-SF	\$ xxx.xx	\$ x,xxx.xx
102	Project Material	HHSL2215LUNVFD85011W	\$ xxx.xx	\$ x,xxx.xx
47	Project Material	HHSL2218L480FD85011W	\$ xxx.xx	\$ x,xxx.xx
1	Deferred Incentive	APCo Incentives Deferred to Trade Ally name	\$ (x,xxx.xx)	\$ (x,xxx.xx)
1	Installation Cost	Installation of Materials and Incidental materials (includes recycle, lifts and permits)	\$ x,xxx.xx	\$ x,xxx.xx

	Subtotal	\$ xx,xxx.xx
	Sales Tax Rate	
	Sales Tax Total	\$ x,xxx.xx
	Total	\$ xx,xxx.xx
	Payments	\$ -
	Balance Due	\$ xx,xxx.xx

All invoices are due and payable upon presentation. Statements are generally issued semi-monthly. All fees and charges are based upon prompt payment. A service charge/price adjustment in an amount equal to 1.5% per 30 day period. In any action of suit relating to the amounts due hereunder, the prevailing party shall be entitled to an award of its reasonably incurred attorney fees in addition to all other remedies.

www.tradeally.com



TAKE CHARGE™
VIRGINIA

Trade Ally LOGO

Trade Ally: Name
Address
Phone number / Fax number

Project Site / Ship To
Company Name
Address
City, State, Zip

Project	Project Name
Message	Final Invoice

Terms	Rep	Ship	Due Date
DUE ON RECEIPT			/ / 2024

QTY	Product	Memo	Unit Cost	Amount
2	Project Material	TMFL LED 7L W HV DIM 50 BZA	\$ xxx.xx	\$ xxx.xx
18	Project Material	TMFL LED 7L W UNV DIM 50 BZA	\$ xxx.xx	\$ x,xxx.xx
9	Project Material	LBK 4FT 1 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ xxx.xx
115	Project Material	LBK 4FT 2 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ x,xxx.xx
19	Project Material	LBK 4FT 2 4000LMHE 80CRI 50K MVOLT	\$ xx.xx	\$ x,xxx.xx
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2	Project Material	ES40P-A1-17K-4MS-50-80-CL-LV-CRM-QDC-10V	\$ xxx.xx	\$ xxx.xx
3	Project Material	LL-SL1-MD-200WD-50K-F60-HV-G2-BRN-SF	\$ xxx.xx	\$ x,xxx.xx
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	Subtotal	\$ xx,xxx.xx
	Sales Tax Rate	
	Sales Tax Total	\$ x,xxx.xx
	Total	\$ xx,xxx.xx
	Payments	\$ -
	Balance Due	\$ xx,xxx.xx

All invoices are due and payable upon presentation. Statements are generally issued semi-monthly. All fees and charges are based upon prompt payment. A service charge/price adjustment in an amount equal to 1.5% per 30 day period. In any action of suit relating to the amounts due hereunder, the prevailing party shall be entitled to an award of its reasonably incurred attorney fees in addition to all other remedies.

www.tradeally.com

Invoice

Date: 8/10/2024

Invoice #
123456789

Customer
Company Name
Address
City, State, Zip

TakeChargeVA.com

SBDI Application

After Application Submittal

- A 7-digit OLA # will be assigned – SBDI_1234567
- An e-signature request will be emailed to the customer
 - APCO VA Prod
[EXTERNAL] Signature requested on "SBDI_66341..."
This is an EXTERNAL email. Do not click links or
 - The *customer* is the one who signs the Terms and Conditions, not the TA (unless an LOA is given)
- Once the customer completes the e-signature, program staff will review the on-line application (OLA)



SBDI Application

Terms and Conditions:

Terms and Conditions

These Terms and Conditions require a signature from the authorized Appalachian Power TakeCharge Virginia Small Business Direct Install Program Customer (Customer) responsible for the project. The details of this application and the Terms and Conditions will be sent via email to the project Primary Contact shown below for acceptance and signature. If the contact below is not authorized to sign the Terms and Conditions, there is an option in the email to delegate the signature to another contact.

Primary Contact Name:

Primary Contact Email:

Program Rules, Requirements, Terms and Conditions

- PROGRAM OFFER:** The Appalachian Power TakeCharge Virginia Small Business Direct Install Program (Program) application covers all Small Business Program projects that qualify for incentives. TRC Solutions, Inc. (TRC) is the Program administrator for Appalachian Power Virginia. Projects with incentives less than \$1,000 have 30 days after installation to submit applications and all documentation for reimbursement. Projects \geq \$1,000 in incentives require pre-approval prior to the purchase of products and installation. Projects must be installed and completed per the date included in the pre-approval letter. The Program may cancel this application without liability if the Customer has: 1) not completed the pre-approved project by the required installation date, and 2) has not applied for a project extension 30-days prior to pre-approval expiration date. NOTE FOR ALL PROJECTS: Customer must provide required post-installation documentation as described elsewhere in these Terms and Conditions. Customer as used herein is the account holder registered with Appalachian Power Company, for which the responsibilities of Customer may be delegated to a Trade Ally.
 - ELIGIBILITY:** Incentives are available to Appalachian Power Company Virginia commercial and industrial Small Business electric customers for the purchase and installation of qualifying Energy Efficiency Measures (EEMs), subject to these Terms and Conditions. Accounts with a demand of 200 kW or less over the previous 12 months qualify for the Small Business Program except for: 1) Customers who have opted out of Appalachian Power Virginia's energy efficiency Programs as of July 1, 2021, or 2) Customers served under the Public Authority or Commonwealth of Virginia tariffs, or 3) Projects that include fuel switching (e.g., electric to gas or gas to electric), on-site electricity generation, gas-driven equipment, or used or rebuilt equipment. Vacant/empty/non-operating facilities are not eligible for incentives.
 - PROJECT VERIFICATION:** The Program is not obligated to pay any incentives until it has performed a satisfactory desk review or post-installation verification. If the Program determines that EEMs were not installed in a manner consistent with the application, not consistent with codes, unsightly, if unapproved EEMs
4. through 14. (cont.)

Customer Information Release Terms and Conditions Acknowledgement

By my signature below (type your name below for electronic signature), and as a condition of participating in the Program, I represent, certify, acknowledge, and/or agree, as applicable:

- I am the owner or an authorized representative of the Customer, which is the owner or operator of the facility associated with the Appalachian Power account number(s) on the application.
- By signing the Participation Agreement, Customer agrees to participate and authorizes Trade Ally to perform an energy assessment and provide a report with eligible EEMs to Customer.
- TRC and Appalachian Power are authorized to include Customer's name, city, or county of business, Program services/incentives, and resulting energy savings in reports or other documents submitted to regulators and agencies administering energy efficiency Programs.
- This participation agreement includes complete and accurate information about the Customer, and the Customer is eligible for the Program.
- I have read and understand, and, in exchange for the benefit of participating in the Program, Customer accepts and will comply with, the Program Rules, Requirements, Terms and Conditions, including, but not limited to, the release, disclaimer of warranty, limit of liability, waiver, and indemnity provisions.
- Upon submission of this Agreement, an agreement is formed between the Program and Customer, which incorporates the Program Rules, Requirements, Terms and Conditions.
- Program offerings, including Program funding and availability, are subject to change without notice.

Appalachian Power TakeCharge VA Small Business Direct Install Program



Signature:

Email:



TAKE CHARGE[™]
VIRGINIA

TakeChargeVA.com

SBDI Application

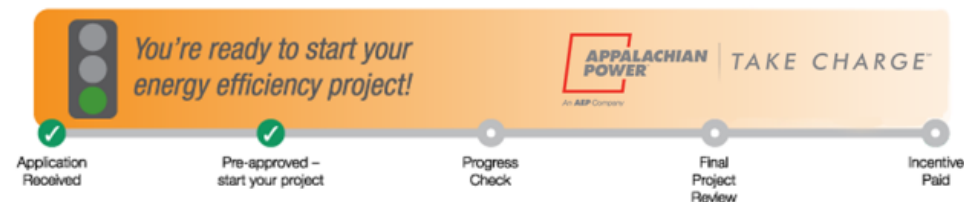
Automatic emails

- Automatic emails will be sent to the TA at the following stages:
 - Application received
 - Project pre-approved – *note: a new Project number will be assigned (SBDI2024_005123)
 - Progress Check
 - Final Project Review
 - stating we have received the final paperwork, it has completed final review and is now approved for payment
 - Incentive Paid
 - Payment has been sent

SBDI Automatic Email

APCo SBDI Pre-Approval Email

Subject Line: Appalachian Power TakeCharge VA SBDI Pre-Approval Project Name
TO: [Trade Ally Email]



[DATE]

TRADE ALLY NAME
CUSTOMER COMPANY NAME
CUSTOMER SITE ADDRESS

RE: Appalachian Power TakeCharge VA Small Business Direct Install (SBDI) Project Pre Approval – OLA ID

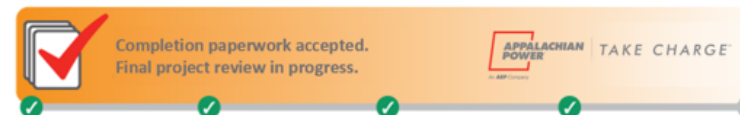
Dear CUSTOMER NAME

Thank you for your interest in participating in the TakeCharge VA SBDI Program. We are pleased to inform you that your SBDI LIGHTING project, Online Application ID (OLA ID) SITE NAME, ADDRESS to install energy efficient measures has been pre-approved and incentives reserved in the amount of INCENTIVE AMOUNT Your new Project number is PROJECT NUMBER.

The incentive check will be sent to TRADE ALLY NAME per your signed authorization on the project application.

SBDI Final Project Approved-Completion Paper Received Email

Subject Line: Appalachian Power TakeCharge VA SBDI Final Approval- Project Name



[DATE]

TRADE ALLY NAME
CUSTOMER COMPANY NAME
CUSTOMER SITE ADDRESS

RE: Appalachian Power TakeCharge VA Small Business Direct Install (SBDI) Project Final Approval – Project Number

Dear CUSTOMER NAME

We have received the final paperwork for your SBDI PROJECT TYPE project for the facility located at PROJECT ADDRESS Your project has completed final review and is now approved for payment.

You will receive another email with payment status.

If you have any questions or concerns, please feel free to contact us at | TakeChargeSavings@trccompanies.com. Any communication about this project should include your Project ID and NAME
Thank you for participating in the Appalachian Power TakeCharge VA Program.

Appalachian Power TakeCharge VA Program | TakeChargeSavings@trccompanies.com | <https://takechargeva.com> | 833-402-2221

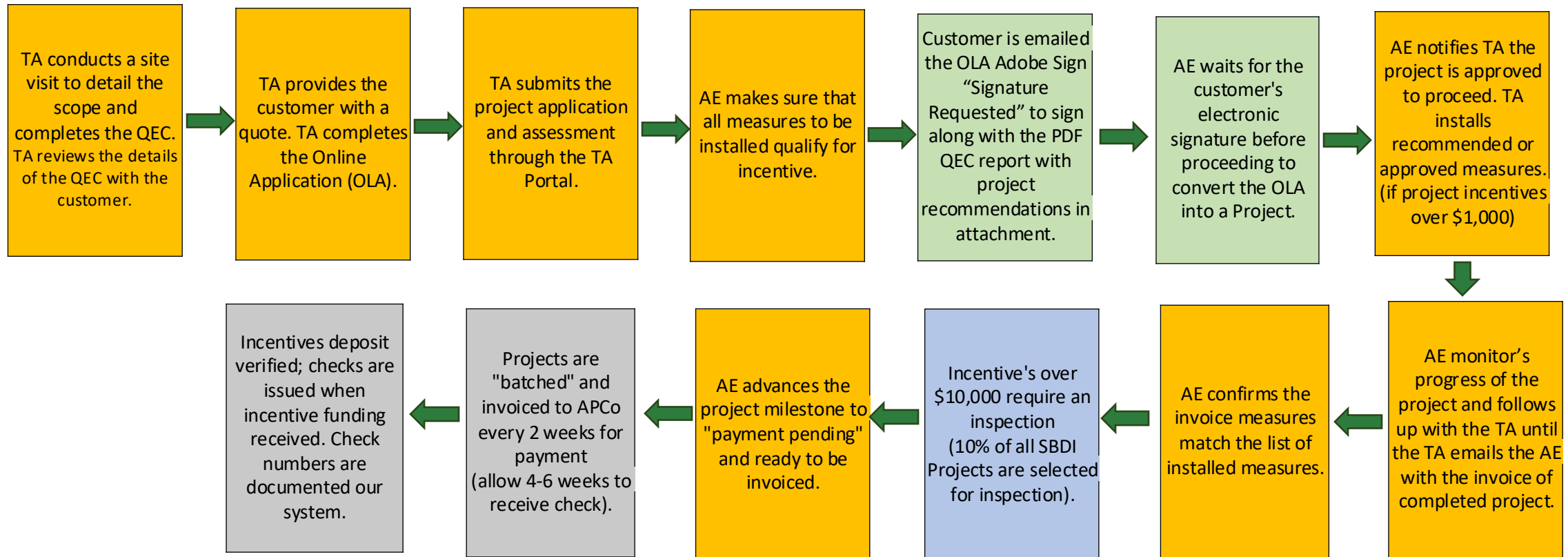
To learn more about TakeCharge Virginia and how you can participate, go to [TakeCharge VA | Home](#).

SBDI Inspections

Inspections

- The first 5 projects of new TAs are required to be inspected
- All projects \$10,000 and over will be inspected
- All projects subject to random inspection

SBDI Project Process



Business Energy Solutions Program



BES Overview

Benefits

- Provides cash incentives and technical assistance for energy efficiency projects at businesses for improvements to facility lighting, HVAC, VFDs, kitchen equipment, and more.
- Reduce operating costs and maintenance
- Can improve productivity by providing a more comfortable work environment.

Eligibility

- All commercial customers except for:
 - a) Public Authority and Commonwealth of Virginia governmental customers
 - b) Customers who have opted out of the TakeCharge VA Programs

NEW
LOOK



TAKE CHARGE™

Business Energy Solutions Program



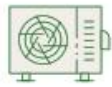
INCENTIVES

Appalachian Power offers cash incentives for energy efficiency improvements that, in addition to reliable electric service at a reasonable cost, can make your place of business comfortable, productive and safe. You can help your bottom-line while being an environmental leader with our energy saving tips and programs.

Businesses can receive up to \$25,000 each for lighting and non-lighting projects, for a total of \$50,000. Incentives are available for various projects, including:



LIGHTING



HVAC



COMPRESSED
AIR



REFRIGERATION



KITCHEN
EQUIPMENT

Get started today!

TakeChargeVA.com

Business Energy Solutions Programs

2024 Incentive Guide

TakeChargeVA | Business Energy Solutions



TAKE CHARGE™
VIRGINIA

BES Lighting

Lighting	Description	Incentive
Exit Sign	LED Exit Sign	\$10 each
Recessed Downlight	LED Recessed Downlight Luminaire: < 1,500 Lumens	\$3 per fixture
	LED Recessed Downlight Luminaire: 1,500 - 2,999 Lumens	\$9 per fixture
	LED Recessed Downlight Luminaire: 3,000 Lumens or above	\$16 per fixture
Screw-in Omnidirectional	LED Standard A-Type (medium-base): < 1,500 Lumens	\$2 per lamp
	LED Standard A-Type (medium-base): 1,500 - 2,999 Lumens	\$4 per lamp
	LED Standard A-Type (medium-base): 3,000 Lumens or above	\$6 per lamp
	LED 3-Way, Bug, Marine, Rough Service, Infrared: < 1,500 Lumens	\$2 per lamp
	LED 3-Way, Bug, Marine, Rough Service, Infrared: 1,500 or above	\$4 per lamp
Screw-in Directional	LED Reflector (medium base w/ bulb diameter \leq 2.25"): 400 - 1,199 Lumens	\$2 per lamp
	LED ER30, BR30, BR40, or ER40 (bulb diameter > 2.26" and \leq 2.5"): 400 - 649 Lumens	\$2 per lamp
	LED BR30, BR40, or ER40 (bulb diameter > 2.26" and \leq 2.5"): 650 - 1419 Lumens	\$3 per lamp
	LED R20 (bulb diameter > 2.26" and \leq 2.5"): 400 - 719 Lumens	\$2 per lamp
	LED Other R, PAR, ER, BR, BPAR, or similar bulb diameter > 2.26" and \leq 2.5": 540-999 Lumens	\$2 per lamp
	LED Other R, PAR, ER, BR, BPAR, or similar bulb diameter > 2.26" and \leq 2.5": 1,000-2,189 Lumens	\$4 per lamp
	LED Other R, PAR, ER, BR, BPAR, or similar bulb diameter > 2.26" and \leq 2.5": 2190 Lumens and above	\$7 per lamp
	LED Other R, PAR, ER, BR, BPAR, or similar bulb diameter >2.5": 640-1179 Lumens	\$2 per lamp
	LED Other R, PAR, ER, BR, BPAR, or similar bulb diameter >2.5": 1,180-2,579 Lumens	\$4 per lamp
	LED Other R, PAR, ER, BR, BPAR, or similar bulb diameter >2.5": 2,580 Lumens or above	\$6 per lamp
	LED All Reflector Lamps below Lumen ranges specified above	\$1 per lamp
Screw-in Decorative	LED Decorative (Shapes B, BA, C, CA, DC, F, G, any base, < 500 lumens)	\$1 per lamp
	LED Decorative (medium-base, \geq 500 lumens)	\$3 per lamp
	LED Decorative (candelabra or intermediate base, \geq 500 lumens)	\$3 per lamp
	LED Globe (any base, <500 lumens)	\$1 per lamp
	LED Globe (medium-base, \geq 500 lumens)	\$3 per lamp
	LED Globe (candelabra or intermediate base, \geq 500 lumens)	\$3 per lamp

BES Lighting (cont.)

Pin-Based	LED Pin Based: < 1,499 Lumens	NEW	\$6 per lamp
	LED Pin Based: 1,500 - 2,999 Lumens	NEW	\$15 per lamp
	LED Pin Based: 3,000 Lumens or above	NEW	\$30 per lamp
Troffer Luminaire and Retrofit Kit	1x4 Tube or Strip LED Troffer		\$6 per fixture
	1x8 Tube or Strip LED Troffer	NEW	\$9 per fixture
	2x2 Tube or Strip LED Troffer		\$6 per fixture
	2x4 Tube or Strip LED Troffer		\$12 per fixture
	2x8 Tube or Strip LED Troffer	NEW	\$18 per fixture
	1x4 LED Troffer Retrofit Kit		\$7 per kit
	1x8 LED Troffer Retrofit Kit	NEW	\$9 per kit
	2x2 LED Troffer Retrofit Kit		\$7 per kit
	2x4 LED Troffer Retrofit Kit		\$14 per kit
	2 x 8 LED Troffer Retrofit Kit	NEW	\$18 per kit
Linear Lamp	LED Linear Replacement Lamp: 2 ft	NEW	\$4 per lamp
	LED Linear Replacement Lamp: 4 ft	NEW	\$6 per lamp
	LED Linear Replacement Lamp: 8 ft	NEW	\$8 per lamp
	LED Linear Replacement Lamp: 2 ft - Controlled by Occupancy Sensor	NEW	\$7 per lamp
	LED Linear Replacement Lamp: 4 ft - Controlled by Occupancy Sensor	NEW	\$11 per lamp
	LED Linear Replacement Lamp: 8 ft - Controlled by Occupancy Sensor	NEW	\$14 per lamp

BES Lighting (cont.)

Lighting	Description	Incentive
High/Low Bay Luminaire	High-Bay Luminaires: 5,000 - 9,999 Lumens	NEW \$25 per fixture
	High-Bay Luminaires: 10,000 - 19,999 Lumens	NEW \$50 per fixture
	High-Bay Luminaires: 20,000 - 29,999 Lumens	NEW \$100 per fixture
	High-Bay Luminaires: 30,000 - 39,999 Lumens	NEW \$150 per fixture
	High-Bay Luminaires: 40,000 Lumens or above	NEW \$200 per fixture
Exterior Lighting	LED Omnidirectional: < 1,499 Lumens	\$2 per lamp
	LED Omnidirectional: 1,500 - 2,999 Lumens	\$6 per lamp
	LED Omnidirectional: 3,000 Lumens or above	\$10 per lamp
	LED Directional: < 1,499 Lumens	\$2 per lamp
	LED Directional: 1,500 - 2,999 Lumens	\$6 per lamp
	LED Directional: 3,000 Lumens or above	\$10 per lamp
	LED Decorative: < 1,499 Lumens	\$2 per lamp
	LED Decorative: 1,500 - 2,999 Lumens	\$6 per lamp
	LED Decorative: 3,000 Lumens or above	\$10 per lamp
	LED Luminaire: 5,000 - 9,999 Lumens	\$13 per fixture
	LED Luminaires: 10,000 - 19,999 Lumens	\$25 per fixture
	LED Luminaires: 20,000 - 29,999 Lumens	\$50 per fixture
	LED Luminaires: 30,000 - 39,999 Lumens	\$75 per fixture
	LED Luminaires: 40,000 Lumens or above	\$100 per fixture
Refrigerated Case Lighting	Refrigerated Case Lighting: 4 ft - Cooler	\$25 per fixture
	Refrigerated Case Lighting: 5 ft - Cooler	\$31 per fixture
	Refrigerated Case Lighting: 6 ft - Cooler	\$37 per fixture
Delamping	Delamping	\$200 per 1000 watts removed

BES Non-Lighting

HVAC	Description	Incentive
Packaged Terminal Heat Pump ²	Packaged Terminal Heat Pump NEW	\$20 each
Packaged Terminal Air Conditioners	Packaged Terminal Air Conditioners < 7 kBtu/h NEW	\$15 unit
	Packaged Terminal Air Conditioners ≥ 7 and < 15 kBtu/h NEW	
	Packaged Terminal Air Conditioners ≥ 15 kBtu/h NEW	
Vertical Heat Pumps	Single Package Vertical Heat Pumps ≤ 5.4 tons NEW	\$15 ton
	Single Package Vertical Heat Pumps > 5.4 and ≤ 11.25 tons NEW	
	Single Package Vertical Air Conditioners ≤ 5.4 tons NEW	\$12 ton
	Single Package Vertical Air Conditioners > 5.4 and ≤ 11.25 tons NEW	
Air Source Heat Pumps	Air Source Heat Pumps - Split and Single Package ≤ 5.4 tons NEW	\$15 ton
	Air Source Heat Pumps - Split and Single Package > 5.4 and ≤ 11.25 tons NEW	\$20 ton
	Air Source Heat Pumps - Split and Single Package > 11.25 and ≤ 20 tons NEW	
	Air Source Heat Pumps - Split and Single Package > 20 tons NEW	
Water Source Heat Pumps	Water Source Heat pump ≤ 1.4 tons NEW	\$15 ton
	Water Source Heat pump > 1.4 and ≤ 5.4 tons NEW	
	Water Source Heat pump > 5.4 and ≤ 11.25 tons NEW	

BES Non-Lighting (cont.)

HVAC	Description	Incentive
Air Conditioners	Air Conditioners - Split and Single Package \leq 5.4 tons	NEW \$15 per ton
	Air Conditioners - Split and Single Package $>$ 5.4 and \leq 11.25 tons	NEW
	Air Conditioners - Split and Single Package $>$ 11.25 and \leq 20 tons	NEW
	Air Conditioners - Split and Single Package $>$ 20 and \leq 63.3 tons	NEW
Chillers	Air Cooled Chillers \leq 150 tons	NEW \$8 per ton
	Water Cooled Chillers - Positive Displacement \leq 75 tons	NEW \$5 per ton
	Water Cooled Chillers - Positive Displacement $>$ 75 and \leq 120per tons	NEW \$5 per ton
	Water Cooled Chillers - Centrifugal \leq 150 tons	NEW \$10 per ton
Ductless, Mini Split	Ductless, Mini Split Air Conditioners \leq 5.4 tons	NEW \$10 per ton
	Ductless, Mini Split Heat Pumps \leq 5.4 tons	NEW \$15 per ton
HVAC Controls	Description	Incentive
Economizers	Dual Enthalpy Economizer \leq 5 tons	NEW \$18 per control
	Dual Enthalpy Economizer $>$ 5 tons	NEW \$55 per control
Smart Thermostats	Smart Thermostat - AC and Electric Resistance Heat	NEW \$30 each
	Smart Thermostat - AC and Heat Pump	NEW \$20 each
	Smart Thermostat - AC and Gas Heat	NEW \$12 each
EC Motors	EC Motors-Hydronic Heating Pumps $<$ 1 HP	NEW \$85 each
	EC Motors-Hydronic Heating Pumps \geq 1HP and \leq 10 HP	NEW \$275 HP
	EC Motors-Hydronic Cooling Pumps $<$ 1 HP	NEW \$35 each
	EC Motors-Hydronic Cooling Pumps \geq 1HP and \leq 10 HP	NEW \$115 HP
	EC Motors-Hydronic DHW Pumps $<$ 1 HP	NEW \$45 each
	EC Motors-Hydronic DHW Pumps \geq 1HP and \leq 10 HP	NEW \$140 HP
HVAC Misc.	Description	Incentive
Fan Belts	Notched Belt for HVAC	NEW \$30 each
	Synchronous Belt for HVAC	NEW \$80 each
Tune-Ups	Chiller Tune-up	NEW \$3 per ton
	HVAC Tune-up	NEW \$4 per ton

BES Non-Lighting (cont.)

VFD	Description	Incentive
VFD for HVAC Application ³	VFD: Fan or Pump	NEW \$150 per HP
Hot Water	Description	Incentive
Water Heater	Hot Water ENERGY STAR Heat Pump Electric Storage Water Heater ≤ 55 Gallons	NEW \$80 each
	Hot Water ENERGY STAR Heat Pump Electric Storage Water Heater > 55 Gallons	NEW \$90 each
Compressed Air	Description	Incentive
Condensate Drains ⁴	Compressed Air No-Loss Condensate Drains	NEW \$225 each
VSD Air Compressor ⁵	VSD Air Compressor	NEW \$4,250 each
Air Nozzle ⁶	Air Nozzle	NEW \$50 each
Thermal Mass Dryer ⁷	Cycling Refrigerated Thermal Mass Dryer	NEW 12¢ per kWh saved
Storage Tank ⁸	Storage Tanks for Load/No Load Screw Compressors	NEW 12¢ per kWh saved

BES Non-Lighting (cont.)

Kitchen	Description	Incentive
Pre-Rinse Spray Valve ⁹	Pre-Rinse Spray Valve 1.6 GPM: Electric Water Heating: Full Service Restaurant	\$54 each
	Pre-Rinse Spray Valve 1.6 GPM: Electric Water Heating: Limited Service (Fast food) Restaurant	
	Pre-Rinse Spray Valve 1.6 GPM: Electric Water Heating: Other Facility	
	Pre-Rinse Spray Valve 1.28 GPM: Electric Water Heating: Full Service Restaurant	\$75 each
	Pre-Rinse Spray Valve 1.28 GPM: Electric Water Heating: Limited Service (Fast food) Restaurant	
	Pre-Rinse Spray Valve 1.28 GPM: Electric Water Heating: Other Facility	
	Pre-Rinse Spray Valve 1.15 GPM: Electric Water Heating: Full Service Restaurant	\$100 each
	Pre-Rinse Spray Valve 1.15 GPM: Electric Water Heating: Limited Service (Fast food) Restaurant	
	Pre-Rinse Spray Valve 1.15 GPM: Electric Water Heating: Other Facility	
Commercial Griddle ¹⁰	Electric Commercial Griddle NEW	\$500 each
Commercial Fryer ¹⁰	Electric Fryer: Standard Size NEW	\$200 each
	Electric Fryer: Large Vat NEW	
Commercial Steam Cooker ¹⁰	Steam Cooker: Steam Generator Baseline NEW	\$1,200 each
	Steam Cooker: Boiler Based Baseline NEW	
Commercial Oven ¹⁰	Electric Commercial Ovens: Convection, Half Size NEW	\$100 each
	Electric Commercial Ovens: Convection, Full Size NEW	\$400 each
	Electric Commercial Ovens: Combination, Pans <15 NEW	\$800 each
	Electric Commercial Ovens: Combination, Pans ≥15 NEW	\$1,000 each
Commercial Dishwasher ¹⁰	Dishwasher: Low Temperature Under Counter (Electric hot water only) NEW	\$280 each
	Dishwasher: Low Temperature Stationary Single Tank Door (Electric hot water only) NEW	\$1,000 each
	Dishwasher: Low Temperature Single Tank Conveyor (Electric hot water only) NEW	\$1,200 each
	Dishwasher: Low Temperature Multi Tank Conveyor (Electric hot water only) NEW	\$1,500 each
	Dishwasher: High Temperature Under Counter (Electric hot water only) NEW	\$350 each
	Dishwasher: High Temperature Stationary Single Tank Door (Electric hot water only) NEW	\$1,300 each
	Dishwasher: High Temperature Single Tank Conveyor (Electric hot water only) NEW	\$1,000 each
	Dishwasher: High Temperature Multi Tank Conveyor (Electric hot water only) NEW	\$2,000 each
	Dishwasher: Pot, Pan, and Utensil (Electric hot water only) NEW	\$370 each

BES New Measures!

Agriculture

- Engine block heat timer: \$50 per unit
- Automatic milker takeoff: \$225 each
- Dairy scroll compressor: \$450 each
- Heat reclaimers: \$1,000 each
- Dairy Vacuum Pump VSD Controls: \$330

Appliances and Plug loads

- Commercial Ice machines: \$9 -\$80 each
- Advanced Power strip: \$2 each
- ENERGY STAR computers, imaging, and uninterruptable power supplier: \$8 -\$14



BES New Measures!

Hot Water

- Heat pump water heaters: \$80 - \$90 each

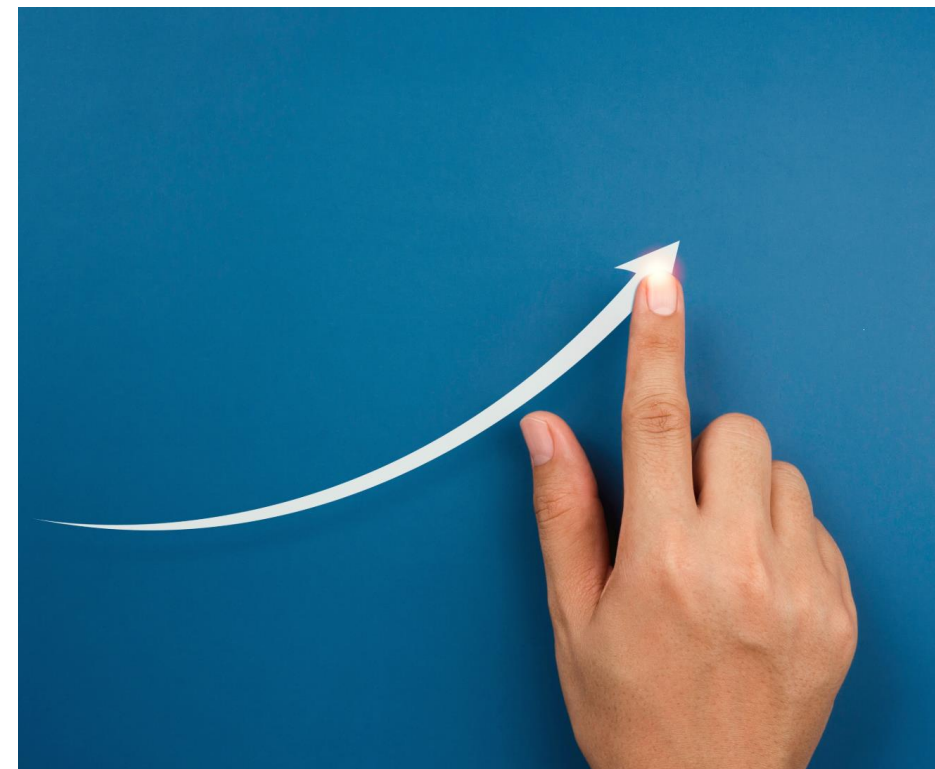
HVAC

- Fan belts: \$30 - \$80
- Packaged terminal ACs (\$15/unit) and Vertical Heat Pumps (\$12/ton)
- Air Source Heat Pumps: \$15 - \$20 per ton
- Water source heat pumps: \$15 per ton
- ACs (split and single package): \$15 per ton
- Water cooled chillers: \$5 - \$10 per ton
- HVAC controls
- Tune-ups: \$3- \$4 per ton



BES Increased Incentives

Equipment	Previous Incentive	NEW! Incentive
Pin-based lighting	\$2 - \$10	\$6 - \$30
High-Bays	\$13 - \$100	\$25 - \$200
Refrigeration Motor Retrofits	\$30 - \$458	\$75 - \$550
Griddles, fryers, steam cookers, ovens	\$50 - \$735	\$100 - \$1,200



BES Incentives

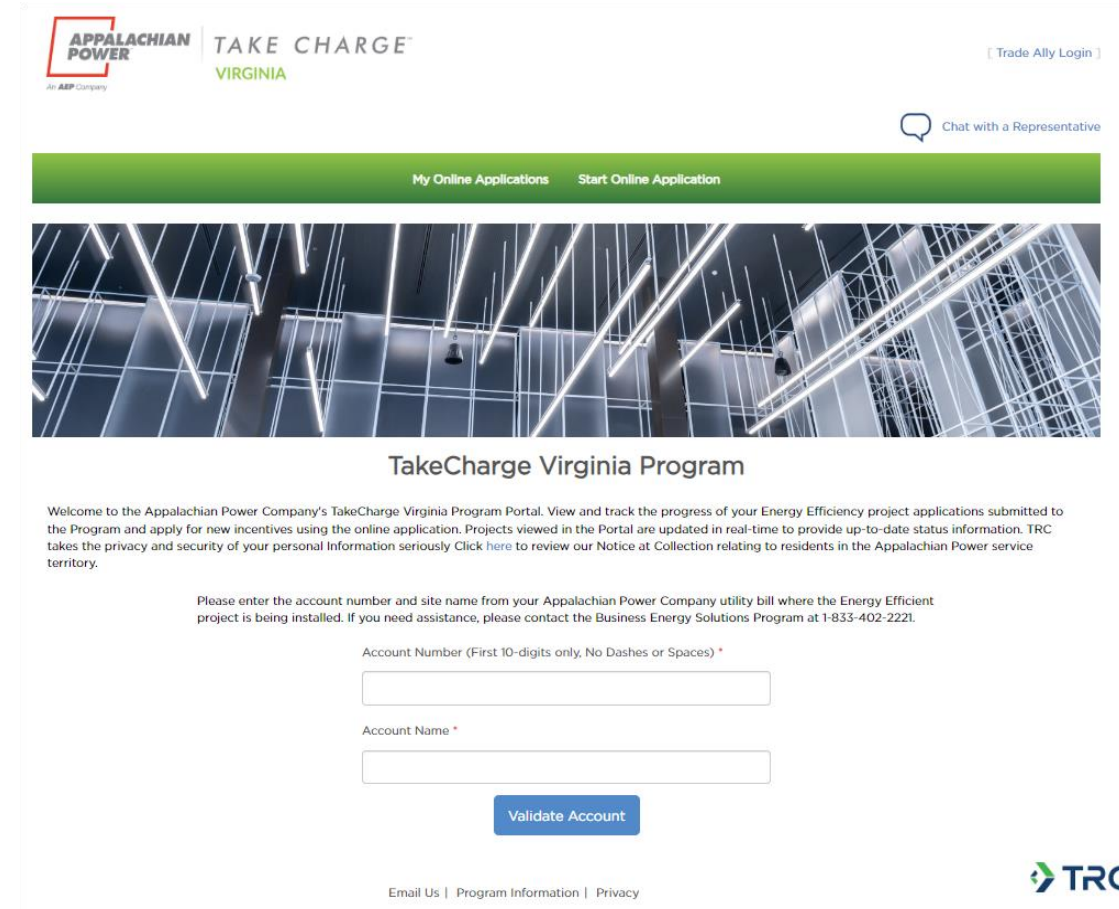
Program Incentives

- Businesses can receive up to \$25,000 each for lighting and non-lighting measures, for a total of \$50,000
- Eligible for up to \$50,000 incentive per calendar year
- Capped at 30% of total project cost (sales tax is excluded)

BES Online Application

Online Application (OLA) Submittal

- Measure installs can be performed by both the customer and TA.
- All projects must be entered into the TA portal
- Web Portal: [TakeCharge VA | Programs For Your Business](#)
 - [Portal–OLA — Business Energy Solutions \(takechargesavingsgateway.com\)](#)
- Submit Your Application



The screenshot shows the TakeCharge Virginia Program portal. At the top, there are logos for Appalachian Power and Take Charge Virginia, along with a 'Trade Ally Login' link. A green navigation bar contains 'My Online Applications' and 'Start Online Application'. Below this is a large image of a modern building interior with a glass facade and structural beams. The main heading is 'TakeCharge Virginia Program'. A welcome message states: 'Welcome to the Appalachian Power Company's TakeCharge Virginia Program Portal. View and track the progress of your Energy Efficiency project applications submitted to the Program and apply for new incentives using the online application. Projects viewed in the Portal are updated in real-time to provide up-to-date status information. TRC takes the privacy and security of your personal information seriously. Click here to review our Notice at Collection relating to residents in the Appalachian Power service territory.' Below this, a prompt asks the user to enter their account number and site name from their utility bill. There are two input fields: 'Account Number (First 10-digits only, No Dashes or Spaces) *' and 'Account Name *'. A blue 'Validate Account' button is positioned below the fields. At the bottom, there are links for 'Email Us', 'Program Information', and 'Privacy', and the TRC logo.

APPALACHIAN POWER | TAKE CHARGE VIRGINIA

[Trade Ally Login]

Chat with a Representative

My Online Applications Start Online Application

TakeCharge Virginia Program

Welcome to the Appalachian Power Company's TakeCharge Virginia Program Portal. View and track the progress of your Energy Efficiency project applications submitted to the Program and apply for new incentives using the online application. Projects viewed in the Portal are updated in real-time to provide up-to-date status information. TRC takes the privacy and security of your personal information seriously. Click here to review our Notice at Collection relating to residents in the Appalachian Power service territory.

Please enter the account number and site name from your Appalachian Power Company utility bill where the Energy Efficient project is being installed. If you need assistance, please contact the Business Energy Solutions Program at 1-833-402-2221.

Account Number (First 10-digits only, No Dashes or Spaces) *

Account Name *

Validate Account

Email Us | Program Information | Privacy

TRC

BES Online Application

Required Supporting Documents

- Project cost estimate (include labor cost, equipment cost, model number(s) and quantity)
 - If project installation is complete at time of application submittal, then upload final invoice instead of cost estimate
- Equipment Specification sheets
- Payee's W9
- Before Pictures (Pre-Rinse Spray Valve)
- On-site T&C with Customer signature (Pre- Rinse Spray Valve)
- If applicable: Letter of Authorization (LOA) from customer

Once installation is complete

- For final review and approval, *email* program staff the following:
 - After Pictures (Pre-Rinse Spray Valve)
 - Final Invoice (include labor cost, equipment cost, model number(s) and quantity)

BES Online Application

Example of an incomplete invoice:

Trade Ally LOGO

Trade Ally: Name
Address
Phone number / Fax number

Project Site / Ship To
Company Name
Address
City, State, Zip

Invoice

Date: 8/10/2024

Invoice #
123456789

Customer
Company Name
Address
City, State, Zip

QTY	Product	Memo	Unit Cost	Amount
1	Electrical	Remove old flood light heads Purchase and installed 5 new flood light heads for Parking and storage area around factory	\$ x.xxx.xx	\$ x.xxx.xx
		TOTAL	\$	x.xxx.xx

BES Online Application

Example of a complete invoice:

Trade Ally LOGO

Trade Ally: Name
Address
Phone number / Fax number

Project Site / Ship To	
Company Name	
Address	
City, State, Zip	

Project	Project Name
Message	Final Invoice
Terms	
DUE ON RECEIPT	

Invoice

Date: 8/10/2024

Invoice #
123456789

Customer
Company Name
Address

QTY	Product	Memo	Unit Cost	Amount
2	Project Material	TMFL LED 7L W HV DIM 50 BZA	\$ xxx.xx	\$ xxx.xx
18	Project Material	TMFL LED 7L W UNV DIM 50 BZA	\$ xxx.xx	\$ x,xxx.xx
9	Project Material	LBK 4FT 1 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ xxx.xx
115	Project Material	LBK 4FT 2 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ x,xxx.xx
19	Project Material	LBK 4FT 2 4000LMHE 80CRI 50K MVOLT	\$ xx.xx	\$ x,xxx.xx
164	Project Material	LBK 4FT 2 8000LMHE 80CRI 50K MVOLT	\$ xx.xx	\$ x,xxx.xx
2	Project Material	ES40P-A1-17K-4MS-50-80-CL-LV-CRM-QDC-10V	\$ xxx.xx	\$ xxx.xx
3	Project Material	LL-SL1-MD-200WD-50K-F60-HV-G2-BRN-SF	\$ xxx.xx	\$ x,xxx.xx
102	Project Material	HHSL2215LUNVFD85011W	\$ xxx.xx	\$ xx,xxx.xx
47	Project Material	HHSL2218L480FD85011W	\$ xxx.xx	\$ x,xxx.xx
1	Deferred Incentive	APCo Incentives Deferred to Trade Ally name	\$ (x,xxx.xx)	\$ (x,xxx.xx)
1	Installation Cost	Installation of Materials and incidental materials (includes recycle, lifts and permits)	\$ x,xxx.xx	\$ x,xxx.xx

	Subtotal	\$ xx,xxx.xx
	Sales Tax Rate	
	Sales Tax Total	\$ x,xxx.xx
	Total	\$ xx,xxx.xx
	Payments	\$ -
	Balance Due	\$ xx,xxx.xx

All Invoices are due and payable upon presentation. Statements are generally issued semi-monthly. All fees and charges are based upon prompt payment. A service charge/price adjustment in an amount equal to 1.5% per 30 day period. In any action of suit relating to the amounts due hereunder, the prevailing party shall be entitled to an award of its reasonably incurred attorney fees in addition to all other remedies.

www.tradeally.com



TAKE CHARGE[™]
VIRGINIA

Trade Ally LOGO

Trade Ally: Name
Address
Phone number / Fax number

Project Site / Ship To
Company Name
Address
City, State, Zip

Project	Project Name		
Message	Final Invoice		
Terms	Rep	Ship	Due Date
DUE ON RECEIPT			/ / 2024

QTY	Product	Memo	Unit Cost	Amount
2	Project Material	TMFL LED 7L W HV DIM 50 BZA	\$ xxx.xx	\$ xxx.xx
18	Project Material	TMFL LED 7L W UNV DIM 50 BZA	\$ xxx.xx	\$ x,xxx.xx
9	Project Material	LBK 4FT 1 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ xxx.xx
115	Project Material	LBK 4FT 2 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ x,xxx.xx
19	Project Material	LBK 4FT 2 4000LMHE 80CRI 50K MVOLT	\$ xx.xx	\$ x,xxx.xx
164	Project Material	LBK 4FT 2 8000LMHE 80CRI 50K MVOLT	\$ xx.xx	\$ x,xxx.xx
2	Project Material	ES40P-A1-17K-4MS-50-80-CL-LV-CRM-QDC-10V	\$ xxx.xx	\$ xxx.xx
3	Project Material	LL-SL1-MD-200WD-50K-F60-HV-G2-BRN-SF	\$ xxx.xx	\$ x,xxx.xx
102	Project Material	HHSL2215LUNVFD85011W	\$ xxx.xx	\$ xx,xxx.xx
47	Project Material	HHSL2218L480FD85011W	\$ xxx.xx	\$ x,xxx.xx
1	Deferred Incentive	APCo Incentives Deferred to Trade Ally name	\$ (x,xxx.xx)	\$ (x,xxx.xx)
1	Installation Cost	Installation of Materials and incidental materials (includes recycle, lifts and permits)	\$ x,xxx.xx	\$ x,xxx.xx

	Subtotal	\$ xx,xxx.xx
	Sales Tax Rate	
	Sales Tax Total	\$ x,xxx.xx
	Total	\$ xx,xxx.xx
	Payments	\$ -
	Balance Due	\$ xx,xxx.xx

All Invoices are due and payable upon presentation. Statements are generally issued semi-monthly. All fees and charges are based upon prompt payment. A service charge/price adjustment in an amount equal to 1.5% per 30 day period. In any action of suit relating to the amounts due hereunder, the prevailing party shall be entitled to an award of its reasonably incurred attorney fees in addition to all other remedies.

www.tradeally.com

TakeChargeVA.com

BES Application

After Application Submittal

- A 7-digit OLA # will be assigned – BES_1234567
- An e-signature request will be emailed to the customer
 - *APCO VA Prod*
[EXTERNAL] Signature requested on BES_56245
- The *customer* is the one who signs the Terms and Conditions, *not* the TA (unless an LOA is given)
- Once the customer completes the e-signature, program staff will review the on-line application (OLA)

BES Application

Terms and Conditions:

Terms and Conditions

Primary Contact Name:

Primary Contact Email:

Program Rules, Requirements, Terms and Conditions

- 1. PROGRAM OFFER:** The Appalachian Power TakeCharge Virginia Business Energy Solutions Program (Program) application covers all BES Program projects that qualify for incentives. TRC Solutions, Inc. (TRC) is the Program administrator for Appalachian Power. Project incentives over \$3,000 require pre-approval prior to the purchase of products or installation. The project must be installed, and post-installation documentation received within four (4) months of the preapproval date. Incentives will be paid based upon published incentive rates, capped at 30% of total project cost. The Program may cancel this application without liability if the Customer has: 1) not installed the approved project by the required installation date, and 2) has not applied for a project extension 30 days prior to pre-approval expiration date. NOTE FOR ALL PROJECTS: Customer must provide required post-installation documentation as described elsewhere in these Terms and Conditions. Customer as used herein is the account holder registered with Appalachian Power Virginia, for which the responsibilities of Customer may be delegated to a Trade Ally. Appalachian Power Virginia reserves the right to ownership of any energy credits.
- 2. ELIGIBILITY:** Incentives are available to Appalachian Power Company Virginia's commercial and industrial electric customers for the purchase and installation of qualifying Energy Efficiency Measures (EEMs), subject to these Terms and Conditions. All commercial accounts are eligible to participate in the BES Program except for 1) Customers who have opted out of Appalachian Power's energy efficiency Programs as of July 1, 2021, or 2) Customers served under the Public Authority or Commonwealth of Virginia tariffs or 3) Projects that include fuel switching (e.g., electric to gas or gas to electric), on-site electricity generation, gas-driven equipment, or used or rebuilt equipment. Vacant/empty/non-operating facilities are not eligible for incentives.
- 3. PROJECT VERIFICATION:** The Program is not obligated to pay any incentives until it has performed a satisfactory desk review or post-installation verification. If the Program determines that EEMs were not installed in a manner consistent with the application, not consistent with codes, unsightly, if unapproved EEMs

Customer Information Release Terms and Conditions Acknowledgement

By my signature below (type your name below for electronic signature), and as a condition of participating in the Program, I represent, certify, acknowledge, and/or agree, as applicable:

- (1) I am the owner or an authorized representative of the Customer, which is the owner or operator of the facility associated with the Appalachian Power account number(s) on the application.
- (2) By signing the Participation Agreement, Customer agrees to participate and authorizes Trade Ally to perform an energy assessment and provide a report with eligible EEMs to Customer.
- (3) TRC and Appalachian Power are authorized to include Customer's name, city, or county of business, Program services/incentives, and resulting energy savings in reports or other documents submitted to regulators and agencies administering energy efficiency Programs.
- (4) This participation agreement includes complete and accurate information about the Customer, and the Customer is eligible for the Program.
- (5) I have read and understand, and, in exchange for the benefit of participating in the Program, Customer accepts and will comply with, the Program Rules, Requirements, Terms and Conditions, including, but not limited to, the release, disclaimer of warranty, limit of liability, waiver, and indemnity provisions.
- (6) Upon submission of this Agreement, an agreement is formed between the Program and Customer, which incorporates the Program Rules, Requirements, Terms and Conditions.
- (7) Program offerings, including Program funding and availability, are subject to change without notice.

Appalachian Power TakeCharge VA Small Business Direct Install Program



Signature:

Email:



TAKE CHARGE[™]
VIRGINIA

TakeChargeVA.com

BES Automatic Emails

Automatic emails

- Automatic emails will be sent to the TA and customer at the following stages:
 - Application received
 - Project pre-approved – *note: a new Project number will be assigned (BES2024_006123)
 - Progress Check
 - Final Project Review
 - stating we have received the final paperwork, it has completed final review and is now approved for payment
 - Incentive Paid
 - Payment has been sent

BES Automatic Emails

1. APCo BES Pre-Approval Email

Subject Line: Appalachian Power TakeCharge VA - BES Pre-Approval – [OLA NUMBER]



[DATE]

[CUSTOMER CONTACT NAME]
[CUSTOMER COMPANY NAME]
[CUSTOMER SITE ADDRESS]
[CC TRADE ALLY CONTACT]

RE: Appalachian Power TakeCharge VA Business Energy Solutions Pre-Approval – [OLA Number]

Dear [CUSTOMER],

Thank you for your interest in participating in the TakeCharge VA Business Energy Solutions Program. We are pleased to inform you that your [PROGRAM] [PROJECT TYPE] project, OLA ID [REFERENCE NUMBER] for [PROJECT SITE] at [PROJECT ADDRESS] to install energy efficient measures has been pre-approved and incentives reserved in the amount of [INCENTIVE]. Your new Project number is (insert the actual project number from Captures)

The incentive check will be sent to [PAYEE COMPANY] per your signed authorization on the project application.

Completion Deadlines: Unless an extension is requested in writing, the project must be completed, and all paperwork submitted within three (3) months (90 DAYS) of the date we communicate approval (this pre-approval date should trigger the 60- day progress email) to move forward with the installation. Please note the following:

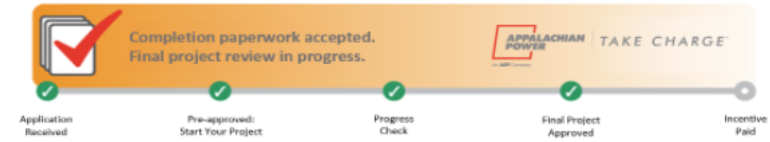
- This offer is contingent upon compliance with the Terms and Conditions listed in Business Energy Solutions Program Application.



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1. APCo BES Final Approval Complete Email

Subject Line: Appalachian Power TakeCharge VA - BES Final Approval Complete – [PROJECT NUMBER]



[DATE]

[CUSTOMER CONTACT NAME]
[CUSTOMER COMPANY NAME]
[CUSTOMER SITE ADDRESS]
[CC TRADE ALLY CONTACT]

RE: Appalachian Power TakeCharge VA Business Energy Solutions (BES) Final Approval Complete– [PROJECT NUMBER]

Dear [CUSTOMER NAME],

We have received the final paperwork for your BES [PROJECT TYPE] project for the facility located at [PROJECT SITE], and your project has completed final review and is now approved for payment.

You will receive another email with payment status.

If you have any questions or concerns, please contact us at TakeChargeSavings@trccompanies.com. Any communication about this project should include your Project ID [REFERENCE NUMBER].

Thank you for participating in the Appalachian Power TakeCharge VA Program.

Appalachian Power TakeCharge VA Program | TakeChargeSavings@trccompanies.com | <https://takechargeva.com> | 833-402-2221

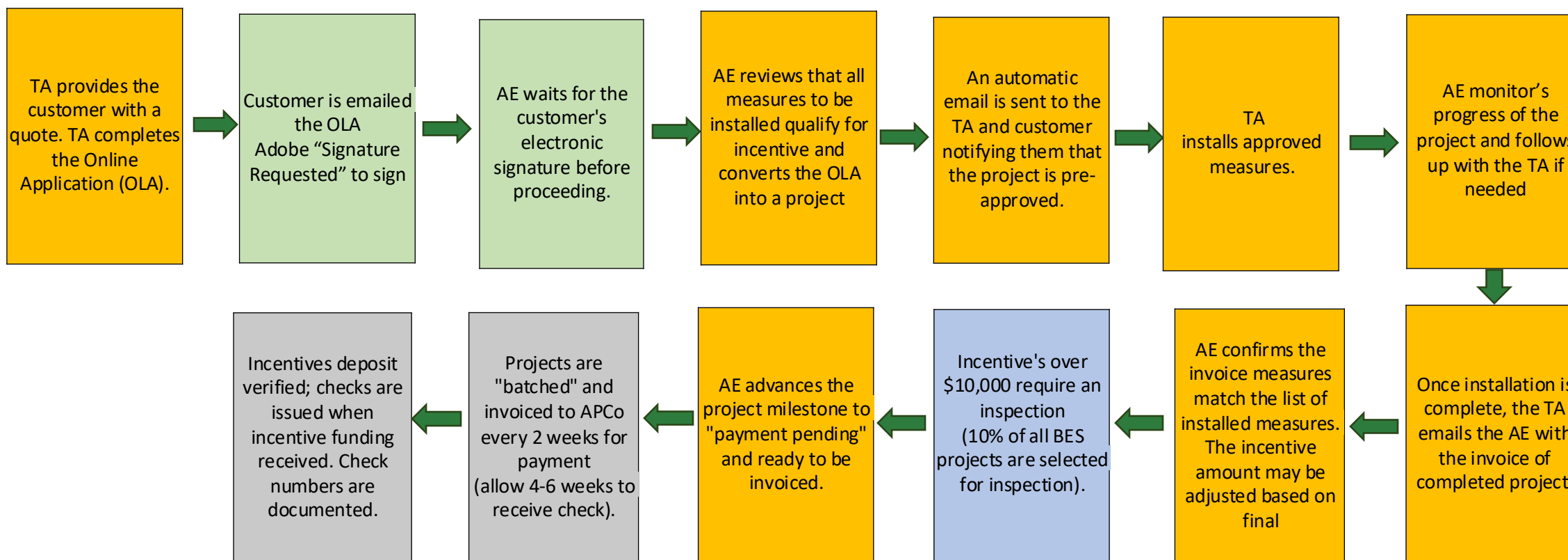
TakeChargeVA.com

BES Inspections

Inspections

- The first 5 projects of new TAs are required to be inspected
- All projects \$10,000 and over will be inspected
- All projects subject to random pre and/or post inspection

BES Project Submittal





An AEP Company

TAKE CHARGE™
VIRGINIA

Custom C&I Program





Custom C&I Overview

Benefits

- Offers tailor-made ways for businesses to save energy and money at their Commercial and Industrial (C&I) facilities.
- Many different project types are eligible for incentives.

Custom C&I Overview

Eligibility Requirements

- All commercial and industrial customers except for:
 - a) Public Authority and Commonwealth of Virginia governmental customers
 - b) Customers who have opted out of the TakeCharge VA Programs
- Any energy efficiency measure that qualifies through the Business Energy Solutions Program or Small Business Direct Install Program will not be eligible
- 50,000 kWh annual savings minimum per project
- **Program approval is required *prior* to purchase or installation**



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VIRGINIA

TakeChargeVA.com

Custom C&I Overview

Equipment Requirements

- Lighting measures must meet Consortium for Energy Efficiency (CEE), Design Lights Consortium™ (DLC), or ENERGY STAR® specifications.
- Non-lighting measures must meet ENERGY STAR, AHRI, CEE, or other specified certification identified by the program, as appropriate

Baseline Requirements

- All custom projects must establish a baseline from which energy and energy cost savings are measured.
- The baseline for most projects will be existing conditions. Projects that involve end of life replacement, capacity changes, or other significant use changes must establish a code or industry standard baseline (e.g., ASHRAE 90.1-2019).

Custom C&I Overview

Project Cost Requirements

- Projects are required to provide the total proposed cost of the project. Any prescriptive or ineligible measure costs should be excluded.
- Project cost should include, at a minimum, relevant material and labor/installation costs.
- Costs must only include the costs related to the custom measure(s).
- Sales tax must be excluded as part of the eligible project cost.

Custom C&I Overview

Energy Savings Eligibility and Requirements

- Applicants are required to provide the total energy savings of the measure(s). Energy savings analysis must be supported by existing and proposed facility data, such as operating schedules, EMS/BMS data, etc. Standard assumptions and baseline must be set in cases where EMS/BMS data is unavailable.
- Energy savings calculations must only include the energy savings related to the custom measure(s).
- A detailed description of the custom measure must be provided including calculation methodology that accurately quantifies the proposed savings.



Custom C&I Overview

Savings Threshold

Program Requirement	Savings Threshold
Minimum Project Savings	Annual savings ≥ 50,000 kWh (per project)
Pre-inspection Required	Annual savings ≥ 250,000 kWh (per project)
Post-inspection Required	Annual savings ≥ 250,000 kWh (per project)
Measurement & Verification Required	Annual savings ≥ 500,000 kWh (per project)

Custom C&I Incentives

Incentive Caps

- Incentives are calculated as the lesser of the following caps:

Incentive Caps	
Energy Savings	\$0.04 / kWh for custom lighting \$0.09 / kWh for non-lighting
Incremental Cost	50% of total incremental cost
Project Cost	50% of total installed cost
Overall Project Cap	\$150,000 per project (a project application may include multiple accounts and buildings)

*Incremental Cost = Proposed Equipment Cost - Baseline Equipment Cost

Custom C&I Measures

Agriculture

Dehumidification
Heat Recovery
Ventilation Fans

Appliances

ENERGY STAR® Appliances

Building Envelope

Air Curtain
Air-sealing/Weather-stripping
Cool Roof
Wall and Roof Insulation
Window Film
Windows and Skylights

Compressed Air

Air Compressor Controls
Air Flow Controller
Eliminate Leaks
Heat Recovery
Low Pressure Drop Filter
No Air Loss Water Drain
System Optimization
Variable Displacement

Data Centers

Air Flow Management
Core Switches and Routers
EC Plug Fans
Heat Reclaim
Hot Aisle/Cold Aisle
IT Power Supply Units
Server Power Management
Server Virtualization
Storage Consolidation
Transformers
Uninterruptible Power Supplies

Domestic Hot Water

Domestic Hot Water Controls
Heat Pump Water Heater
Heat Recovery
Low Flow Fixtures
Pipe Insulation

HVAC Systems

Heat Pumps (air-cooled, water-cooled, ground-source)
Chillers (air-cooled and water-cooled)
CRAC Units
Condensing Units
Dehumidification
DX DOAS
Heat Recovery Chillers
Heat Rejection
Indoor Pool Dehumidifier
Process Cooling and Heating
Pipe Insulation
VRF

HVAC Controls

Advanced RTU Controls
Chiller Plant Optimization
Demand Control Ventilation
Economizer (air and water)
Energy Management System
Fume Hood Controls
Heat and Energy Recovery
Laboratory System Controls
Optimal Start/Stop Controls
Set Point Optimization
Static Pressure Reset
Supply Temperature Reset (chilled water, hot water, air)
Thermostat and Setback Controls
Variable Speed Controls
Ventilation Fan Scheduling

Lighting

Daylighting and Occupancy
Lighting Controls
LED Lighting Fixtures
Networking Lighting Control Systems
Luminaire Level Lighting Controls

Misc. Loads

Battery Chargers
Computer Management Software
Industrial Equipment Controls and Replacement
Injection Molding Equipment
Kitchen Equipment
Plug Load Controls
Process Improvements

Refrigeration Controls

Evaporator Fan
Floating Head Pressure Control
Optimization (defrost cycle, condensing unit capacity)
Variable Speed Controls

Motors

EC Motors
Elevator Modernization
Industrial Process
Pool Pumps
Variable Speed Drives

Refrigeration Systems

Commercial Refrigerators and Freezers
High Efficiency Compressors
Industrial Refrigeration
Refrigerated Area Insulation
Refrigerated Cases and Racks
Walk-In Cooler and Freezers

New Construction

Measures that save energy by exceeding efficiency requirements prescribed by ASHRAE Standard 90.1-2016

Custom C&I Program Process



Custom C&I Process

Step 1: Project Initiation

- Complete online application
- Initial project review
- Inspection, when applicable

Step 2: Offer and Commitment

- Technical review and approval
- Offer letter sent
- 6 months to complete project

Step 3: Installation and Final Approval

- Completion documentation submitted through portal
- Inspection, when applicable
- Final savings review

Step 4: Post-Installation Check Payment

- Check processed and mailed
- Payment can be made to customer or trade ally
- Track status in portal!

Custom C&I Process (cont.)

Step 1: Project Initiation

- Applications will be submitted by the Trade Ally or participant through the online portal (including all supporting documentation)
- Program staff will conduct an initial review
- Pre-inspections will be conducted for projects with annual savings over 250,000 kWh
- Inspections, both pre and post, may be conducted using physical walkthroughs and virtual options

Custom C&I Process (cont.)

Step 2: Offer and Commitment

- Once estimated energy savings are agreed upon between program staff and customer, the project will undergo pre-approval review by APCo
- An offer letter will be issued to the TA/customer with the pre-approved incentive amount based on the estimated energy savings
- The project(s) must be installed, and post-installation documentation received within 6 months of the approval date

Custom C&I Process (cont.)

Step 3: Installation and Final Approval

- Program staff will engage with the customer throughout the installation process
- Submit completion documentation through portal
- Post-inspection will be conducted for projects with annual savings over 250,000 kWh
- Final energy savings review will be conducted based on installed scope of work, project invoices, and post-inspection
- Project will undergo final review and approval by APCo

Custom C&I Process (cont.)

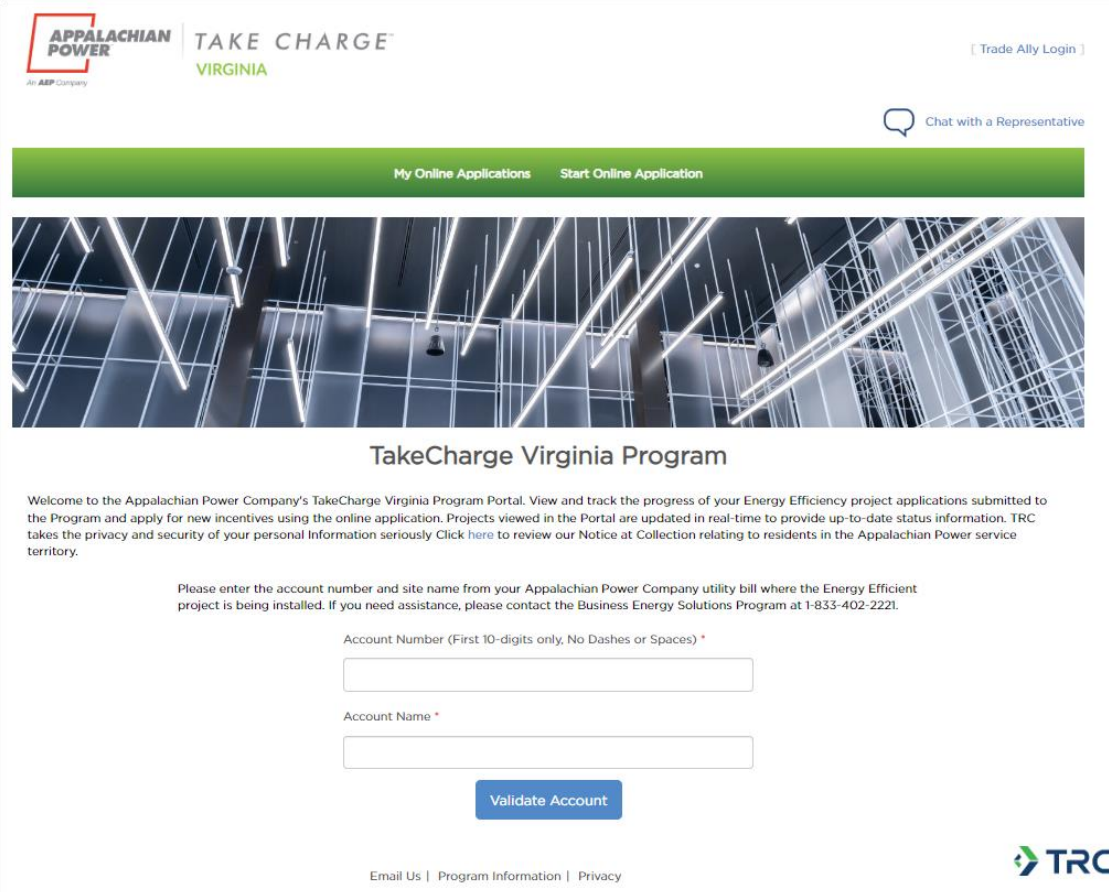
Step 4: Post-Installation Check Payment

- For projects with annual savings less than or equal to 500,000 kWh, a 100% payment will be made upon project completion and review
- For projects with annual savings greater than 500,000 kWh, a 50% payment will be made upon project completion with an additional payment following measurement & verification. The final payment will be trued-up based on measured energy savings

Custom C&I Online Application

Online Application (OLA) Submittal

- Measure installs can be performed by both the customer and TA.
- All projects must be entered into the TA portal
- [Web Portal: TakeCharge VA | Programs For Your Business](#)
 - [TakeCharge VA | Custom Program](#)
- Submit Your Application



The screenshot shows the TakeCharge Virginia Program portal. At the top, there are logos for Appalachian Power and Take Charge Virginia, along with a 'Trade Ally Login' link. A green navigation bar contains 'My Online Applications' and 'Start Online Application'. Below this is a large image of a modern building interior with a glass facade and bright lighting. The main heading is 'TakeCharge Virginia Program'. A welcome message follows, explaining the portal's purpose for tracking energy efficiency projects and applying for incentives. Below the welcome message, there is a form with two input fields: 'Account Number (First 10-digits only, No Dashes or Spaces) *' and 'Account Name *'. A blue 'Validate Account' button is positioned below the fields. At the bottom, there are links for 'Email Us', 'Program Information', and 'Privacy', and the TRC logo is on the right.

APPALACHIAN POWER | TAKE CHARGE VIRGINIA

[Trade Ally Login]

Chat with a Representative

My Online Applications Start Online Application

TakeCharge Virginia Program

Welcome to the Appalachian Power Company's TakeCharge Virginia Program Portal. View and track the progress of your Energy Efficiency project applications submitted to the Program and apply for new incentives using the online application. Projects viewed in the Portal are updated in real-time to provide up-to-date status information. TRC takes the privacy and security of your personal information seriously. Click [here](#) to review our Notice at Collection relating to residents in the Appalachian Power service territory.

Please enter the account number and site name from your Appalachian Power Company utility bill where the Energy Efficient project is being installed. If you need assistance, please contact the Business Energy Solutions Program at 1-833-402-2221.

Account Number (First 10-digits only, No Dashes or Spaces) *

Account Name *

Validate Account

[Email Us](#) | [Program Information](#) | [Privacy](#)

TRC

Custom C&I Online Application

Required Supporting Documents

- Energy savings analysis (Excel spreadsheet calculations or energy model files, statement of assumptions and key equations used, access to spreadsheet calculations)
- Project scope of work and description of existing and proposed conditions
- Existing equipment list/schedules
- Proposed equipment specification sheets (datasheets)
- Project cost estimate (including labor and equipment costs)
- Payee's W9
- A copy of a utility bill from the facility
- Measurement and Verification (M&V) plan for projects over 500,000 kWh estimated energy savings

Once installation is complete

- For final review and approval, email program staff the following:
 - Final invoice (include labor cost, equipment cost, model number(s) and quantity)



TAKE CHARGE™
VIRGINIA

TakeChargeVA.com



Custom C&I Online Application

Example of an incomplete invoice:

Trade Ally LOGO

Trade Ally: Name
Address
Phone number / Fax number

Project Site / Ship To
Company Name
Address
City, State, Zip

Invoice

Date: 8/10/2024

Invoice #
123456789

Customer
Company Name
Address
City, State, Zip

QTY	Product	Memo	Unit Cost	Amount
1	Electrical	Remove old flood light heads Purchase and installed 5 new flood light heads for Parking and storage area around factory	\$ x.xxx.xx	\$ x.xxx.xx
			TOTAL	\$ x.xxx.xx

Custom C&I Online Application

Example of a complete invoice:

Trade Ally LOGO

Trade Ally: Name
Address
Phone number / Fax number

Project Site / Ship To	
Company Name	
Address	
City, State, Zip	

Project	Project Name
Message	Final Invoice
Terms	
DUE ON RECEIPT	

Invoice

Date: 8/10/2024

Invoice #
123456789

Customer
Company Name

QTY	Product	Memo	Unit Cost	Amount
2	Project Material	TMFL LED 7L W HV DIM 50 BZA	\$ xxx.xx	\$ xxx.xx
18	Project Material	TMFL LED 7L W UNV DIM 50 BZA	\$ xxx.xx	\$ x,xxx.xx
9	Project Material	LBK 4FT 1 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ xxx.xx
115	Project Material	LBK 4FT 2 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ x,xxx.xx
19	Project Material	LBK 4FT 2 4000LMHE 80CRI 50K MVOLT	\$ xx.xx	\$ x,xxx.xx
164	Project Material	LBK 4FT 2 8000LMHE 80CRI 50K MVOLT	\$ xx.xx	\$ x,xxx.xx
2	Project Material	ES40P-A1-17K-4MS-50-80-CL-LV-CRM-QDC-10V	\$ xxx.xx	\$ xxx.xx
3	Project Material	LL-SL1-MD-200WD-50K-F60-HV-G2-BRN-SF	\$ xxx.xx	\$ x,xxx.xx
102	Project Material	HHSL2215LUNVFD85011W	\$ xxx.xx	\$ xx,xxx.xx
47	Project Material	HHSL2218L480FD85011W	\$ xxx.xx	\$ x,xxx.xx
1	Deferred Incentive	APCo Incentives Deferred to Trade Ally name	\$ (x,xxx.xx)	\$ (x,xxx.xx)
1	Installation Cost	Installation of Materials and Incidental materials (includes recycle, lifts and permits)	\$ x,xxx.xx	\$ x,xxx.xx

	Subtotal	\$ xx,xxx.xx
	Sales Tax Rate	
	Sales Tax Total	\$ x,xxx.xx
	Total	\$ xx,xxx.xx
	Payments	-
	Balance Due	\$ xx,xxx.xx

All Invoices are due and payable upon presentation. Statements are generally issued semi-monthly. All fees and charges are based upon prompt payment. A service charge/price adjustment in an amount equal to 1.5% per 30 day period. In any action of suit relating to the amounts due hereunder, the prevailing party shall be entitled to an award of its reasonably incurred attorney fees in addition to all other remedies.

www.tradeally.com



TAKE CHARGE™
VIRGINIA

Trade Ally LOGO

Trade Ally: Name
Address
Phone number / Fax number

Project Site / Ship To
Company Name
Address
City, State, Zip

Project	Project Name		
Message	Final Invoice		
Terms	Rep	Ship	Due Date
DUE ON RECEIPT			/ /2024

QTY	Product	Memo	Unit Cost	Amount
2	Project Material	TMFL LED 7L W HV DIM 50 BZA	\$ xxx.xx	\$ xxx.xx
18	Project Material	TMFL LED 7L W UNV DIM 50 BZA	\$ xxx.xx	\$ x,xxx.xx
9	Project Material	LBK 4FT 1 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ xxx.xx
115	Project Material	LBK 4FT 2 3000LMHE 80CRI 40K MVOLT	\$ xx.xx	\$ x,xxx.xx
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2	Project Material	ES40P-A1-17K-4MS-50-80-CL-LV-CRM-QDC-10V	\$ xxx.xx	\$ xxx.xx
3	Project Material	LL-SL1-MD-200WD-50K-F60-HV-G2-BRN-SF	\$ xxx.xx	\$ x,xxx.xx
102	Project Material	HHSL2215LUNVFD85011W	\$ xxx.xx	\$ xx,xxx.xx
47	Project Material	HHSL2218L480FD85011W	\$ xxx.xx	\$ x,xxx.xx
1	Deferred Incentive	APCo Incentives Deferred to Trade Ally name	\$ (x,xxx.xx)	\$ (x,xxx.xx)
1	Installation Cost	Installation of Materials and Incidental materials (includes recycle, lifts and permits)	\$ x,xxx.xx	\$ x,xxx.xx

	Subtotal	\$ xx,xxx.xx
	Sales Tax Rate	
	Sales Tax Total	\$ x,xxx.xx
	Total	\$ xx,xxx.xx
	Payments	-
	Balance Due	\$ xx,xxx.xx

All Invoices are due and payable upon presentation. Statements are generally issued semi-monthly. All fees and charges are based upon prompt payment. A service charge/price adjustment in an amount equal to 1.5% per 30 day period. In any action of suit relating to the amounts due hereunder, the prevailing party shall be entitled to an award of its reasonably incurred attorney fees in addition to all other remedies.

www.tradeally.com

Invoice

Date: 8/10/2024

Invoice #
123456789

Customer
Company Name
Address
City, State, Zip

TakeChargeVA.com

Custom C&I Application

After Application Submittal:

- A 7-digit OLA # will be assigned – CCIP_1234567
- An e-signature request will be emailed to the customer
 - **APCO VA Prod**
[EXTERNAL] Signature requested on 'CCIP_75423...'
- The *customer* is the one who signs the Terms and Conditions, *not* the TA (unless an LOA is given)
- Once the customer completes the e-signature, program staff will review the online application (OLA)

Custom C&I Application

Terms and Conditions:

Terms and Conditions

Primary Contact Name:

Primary Contact Email:

Program Rules, Requirements, Terms and Conditions

1. PROGRAM OFFER:

The Appalachian Power TakeCharge Virginia Custom C&I Program (Program) application covers all Custom Program projects that qualify for incentives. TRC Solutions, Inc. (TRC) is the Program administrator for Appalachian Power TakeCharge Virginia Custom C&I Program. Project incentives over \$3,000 require pre-approval prior to the purchase of products or installation. The project must be installed, and post-installation documentation received within four (4) months of the preapproval date. Incentives will be paid based upon published incentive rates, capped at 30% of total project cost. The Program may cancel this application without liability if the Customer has: 1) not installed the approved project by the required installation date, and 2) has not applied for a project extension 30 days prior to pre-approval expiration date. NOTE FOR ALL PROJECTS: Customer must provide required post-installation documentation as described elsewhere in these Terms and Conditions. Customer as used herein is the account holder registered with Appalachian Power Virginia, for which the responsibilities of Customer may be delegated to a Trade Ally. Appalachian Power Virginia reserves the right to ownership of any energy credits.

2. ELIGIBILITY:

Incentives are available to Appalachian Power Virginia's C&I electric customers for the purchase and installation of qualifying Energy Efficiency Measures (EEMs), subject to these Terms and Conditions. All C&I accounts are eligible to participate in the Custom Program except for 1) Customers who have opted out of Appalachian Power Virginia's energy efficiency Programs as of July 1, 2021, or 2) Customers served under the Public Authority or Commonwealth of Virginia tariffs, or 3) Projects that include fuel switching (e.g., electric to gas or gas to electric), on-site electricity generation, gas-driven equipment, or used or rebuilt equipment. Vacant/empty/non-operating facilities are not eligible for incentives.

3. PROJECT VERIFICATION:

The Program is not obligated to pay any incentives until it has performed a satisfactory desk review or post-installation verification. If the Program determines that EEMs were not installed in a manner consistent with the application, not consistent with codes, unsightly, if unapproved EEMs

Customer Information Release Terms and Conditions Acknowledgement

By my signature below (type your name below for electronic signature), and as a condition of participating in the Program, I represent, certify, acknowledge, and/or agree, as applicable:

(1) I am the owner or an authorized representative of the Customer, which is the owner or operator of the facility associated with the Appalachian Power account number(s) on the application.

(2) By signing the Participation Agreement, Customer agrees to participate and authorizes Trade Ally to perform an energy assessment and provide a report with eligible EEMs to Customer.

(3) TRC and Appalachian Power are authorized to include Customer's name, city, or county of business, Program services/incentives, and resulting energy savings in reports or other documents submitted to regulators and agencies administering energy efficiency Programs.


(4) This participation agreement includes complete and accurate information about the Customer, and the Customer is eligible for the Program.

(5) I have read and understand, and, in exchange for the benefit of participating in the Program, Customer accepts and will comply with, the Program Rules, Requirements, Terms and Conditions, including, but not limited to, the release, disclaimer of warranty, limit of liability, waiver, and indemnity provisions.

(6) Upon submission of this Agreement, an agreement is formed between the Program and Customer, which incorporates the Program Rules, Requirements, Terms and Conditions.

(7) Program offerings, including Program funding and availability, are subject to change without notice.

Appalachian Power TakeCharge VA Small Business Direct Install Program



Signature:

Email:

APPALACHIAN
POWER

An AEP Company

TAKE CHARGE™

VIRGINIA

TakeChargeVA.com

Custom C&I Automatic Emails

Automatic emails

- Automatic emails will be sent to the TA and customer at the following stages:
 - Application Received
 - Project Pre-approved – *note: a new Project number will be assigned (CCIP2024_004123)
 - Progress Check

Custom C&I Automatic Email



Subject: Application Number-Project Site – Pre-Approval Letter

9/27/2024 11:04 AM



Project #:	CCIP2024_00000
Measures:	See attached report
Current kWh Energy Savings, all Measures:	xxx,xxx. kWh
Total Incentive, all Measures:	\$xx,xxx

Dear Customer Name,

This Custom project for Project Site, located at Project Address has been pre-approved, and funds are reserved for an incentive of \$ _\$xx,xxx . This pre-approval is valid for 180 days from the pre-approval letter's date. If your project will take longer than 180 days to complete, please notify the program team at TakeChargeSavings@trccompanies.com or 1-833-402-2221.

The actual incentive paid will be based on equipment installed and actual energy savings, which may be verified through site inspections and/or measurement and verification (M&V). Incentives will be paid as the lessor of the following:

- Pre-approved incentive amount
- \$0.04 / kWh for custom lighting projects
- \$0.09 / kWh for non-lighting projects
- 50% incremental cost (excluding state sales tax)
- 50% install cost (excluding state sales tax)

Projects with annual savings of greater than 500,000 kWh will require M&V. For these projects, pre-approved incentive amounts will be split into two payments: one payment following construction completion and post-inspection and another payment following M&V.

Next Steps

1. Acknowledge and accept this pre-approval offer within 30 days by forwarding this email to TakeChargeSavings@trccompanies.com and entering "I approve".
2. Install the energy efficiency measures within 180 days of this pre-approval letter.
3. Provide close-out documentation via email to TakeChargeSavings@trccompanies.com, including:
 - Invoice(s) for the measures installed including material costs, quantities, unit prices, and labor
 - Post-installation data as required by the program team, if applicable
 - Incentive request form
 - Post-installation energy savings analysis and specification sheets, if installed conditions differ from those originally proposed
 - W-9 form for the entity receiving the incentive
4. Projects may be subject to a post-installation inspection and M&V.

Sincerely,

Appalachian Power Custom Program
Toll Free: 1-833-402-2221

[Website](http://www.appalachianpower.com)

Visit www.appalachianpower.com

Custom Program



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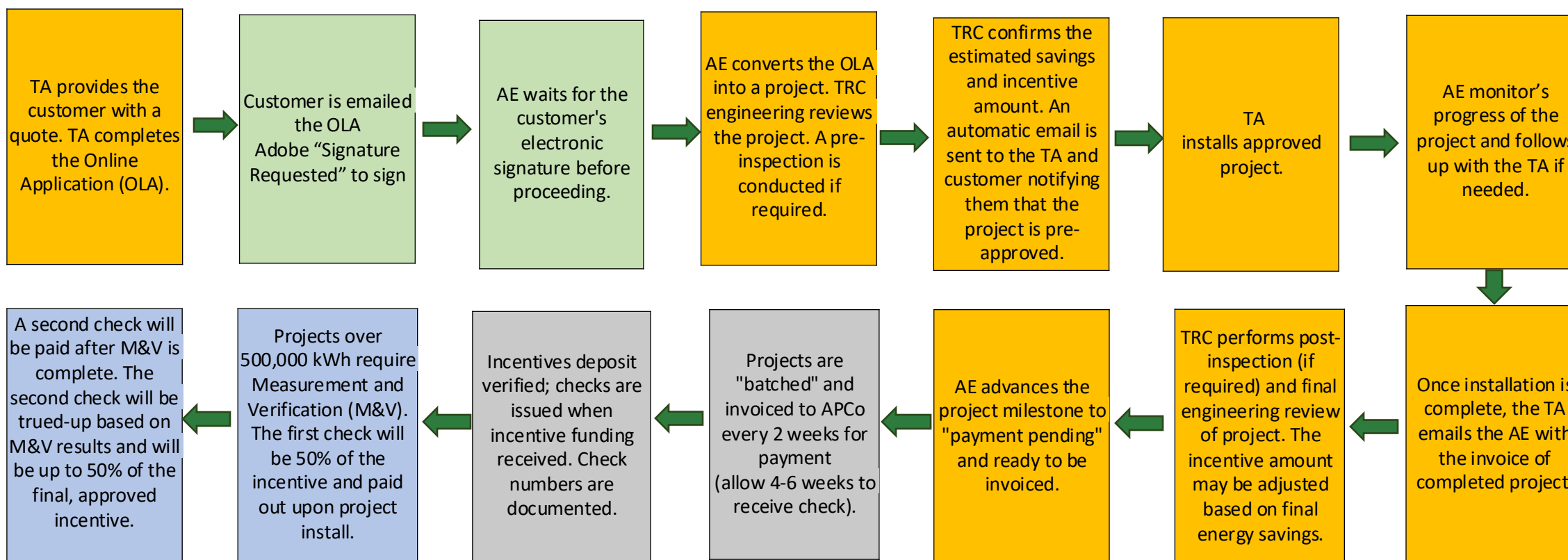
TakeChargeVA.com

Custom C&I Inspections

Inspections

- All projects with estimated savings of 250,000 kWh or more receive an automatic pre-inspection and post-inspection
- Where project documents are unclear or additional information is required to determine the energy savings, an inspection may be required
- The first project of a new TA may be inspected
- All projects are subject to random pre and/or post inspections

Custom C&I Process Flow



Home Performance Program





Home Performance Overview

Overview

- Helps customers save money and energy.
- Increase comfort in customer homes.
- Energy assessments performed at no cost to identify areas where customers could be more efficient.
- Rebates are only available when a customer uses an approved Trade Ally.
- Available to qualifying residential homes receiving electric service from Appalachian Power VA and limited to single family homes (townhomes and duplex units will also be considered).
- Rebates are paid following the installation of qualifying equipment and approval by TakeCharge VA.



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TakeChargeVA.com

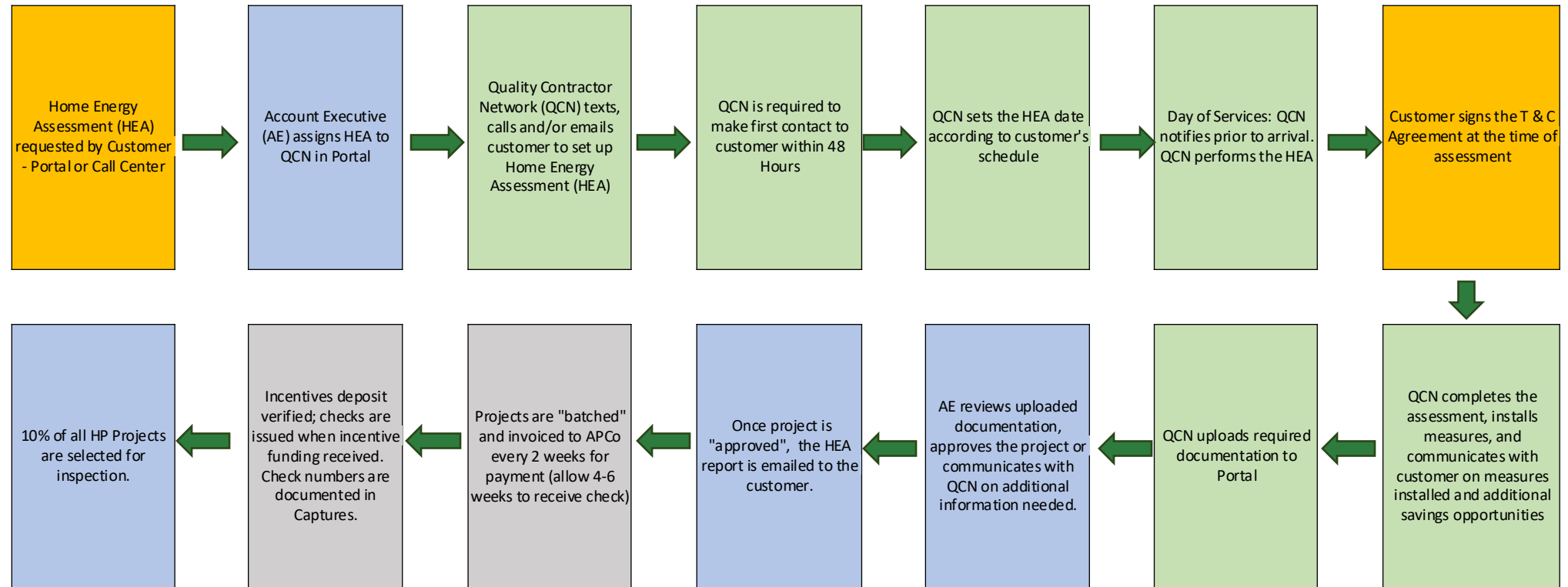
Home Performance Incentives – Direct Install

Lighting	Description	Incentive
Screw-in Directional¹	LED R20 Short (450-750 lumens)	\$7 each
Screw-in Decorative¹	LED Decorative (Shapes B, BA, C, CA, DC, F, G, any base <310 lumens)	\$3 each
Nightlight¹	LED Nightlight	\$3 each
Direct Install Hot Water	Description	Incentive
Aerator²	1.5 GPM Kitchen Faucet Aerator (Electric Water Heating only)	\$8 each
	1.5 GPM Bathroom Faucet Aerator (Electric Water Heating only)	\$8 each
Low Flow Showerhead²	2 GPM Low Flow Showerhead (Electric Water Heating only)	\$15 each
	2 GPM Low Flow Showerhead w/Thermostatic Shower Valve (Electric Water Heating only)	\$50 each
Hot Water Heater Thermostat Setback	Electric Hot Water Heater Thermostat Setback	\$5 each
Direct Install Insulation	Description	Incentive
DHW Pipe Insulation	R-3 Insulation of 1/2 thickness on 3/4" DHW Pipe (Electric Water Heating only)	\$3 linear foot
	R-3 Insulation of 1/2 thickness on 1/2" DHW Pipe (Electric Water Heating only)	\$3 linear foot
Hot Water Tank Wrap³	30 Gallon Domestic Hot Water Tank Wrap (Electric Water Heating only)	\$35 each
	40 Gallon Domestic Hot Water Tank Wrap (Electric Water Heating only)	\$35 each
	60 Gallon Domestic Hot Water Tank Wrap (Electric Water Heating only)	\$35 each
	80 Gallon Domestic Hot Water Tank Wrap (Electric Water Heating only)	\$35 each
Caulked Penetration⁴	Caulked Penetration	\$10 penetration
Weather Stripping, Caulking and Sealing⁴	Weather Stripping, Caulking and Sealing	\$2 10 linear feet
Outlet Gasket⁴	Outlet Gasket	\$5 gasket

Home Performance Incentives – Direct Install

Direct Install Insulation	Description	Incentive
Duct Insulation (R-6) of Sealed Ducts ^{4,5}	Duct Insulation (R-6) of Sealed Ducts	\$10 square foot
Air Handler Filter and Filter Whistle ⁴	Air Handler Filter and Filter Whistle	\$8 each
Duct Sealing ^{4,5}	Duct Sealing	\$150 home

Home Performance Process Flow





Home Performance with EnergyStar® (HPwES) Overview

Overview

HPwES are projects that consist of Attic insulation, Mini Split Heat Pump and Air Sealing Measures. The requirements are outlined below.

- Customer needs to have a Home Energy Assessment (HEA)
- Electric as a primary heating source
- QCN has to submit paid invoice and pictures of installed insulation or mini split heat pump
- Air Sealing requires pictures of Pre and Post Blower Door Test



Home Performance with Energy Star® Guidelines

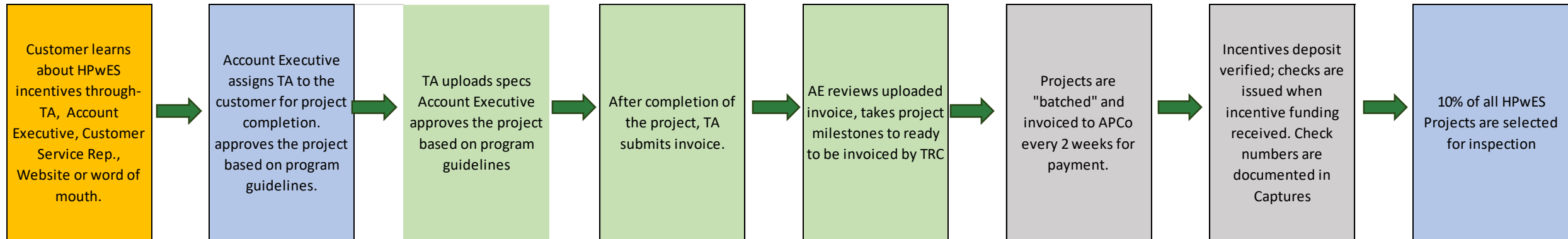
Requirements

- Home must have electric heat
- Must submit a PAID invoice
- Must upload Photos
- Must have had an HEA

Home Performance Incentives

HVAC	Description	Incentive
Ductless Mini-Split ⁶	Ductless Mini-Split Heat Pump: Replacing ASHP or GSHP/AC	\$267 each
	Ductless Mini-Split Heat Pump: Replacing Electric Resistance Heat/AC	\$267 each
Insulation	Description	Incentive
Attic Insulation ⁷	Attic Insulation: AC, Electric Resistance Heat	\$550 per 1,000 sf
	Attic Insulation: AC, Heat Pump	\$125 per 1,000 sf
	Attic Insulation: no AC, Electric Resistance Heat	\$450 per 1,000 sf
	Attic Insulation: no AC, Heat Pump	\$100 per 1,000 sf
Air Sealing ^{4,8}	Air Sealing: AC and Electric Heat	\$350 per home
	Air Sealing: no AC and Electric Heat	\$350 per home

Home Performance with Energy Star Process Flow



Trade Ally Expectations and Resources



Trade Ally (TA) Expectations

Business Energy Solutions (BES)

- TA must complete all provided training.
- All customer-facing program materials and collateral must be approved.
- TA should be timely when working with customer and implementer to schedule a project. Once a customer has expressed interest in the program and a project, the TA should contact the customer within 48 hours to begin scheduling.
- Customers served under Appalachian Power's Virginia Nonresidential tariffs, such as Schedule M.G.S. (Medium General Service) or Schedule G.S. (General Service), but not served under the Public Authority or Commonwealth of Virginia tariffs, may be eligible for Appalachian Power's TakeCharge Programs.
- All projects must be entered into the TA portal. This should be in provided training. If you have questions regarding the TA portal, please contact one of the TRC outreach coordinators.
- No turning away projects. TAs must be honest when listing areas they are willing to actively serve. If you list that you will serve a specific area, then you must be willing to go there.



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TakeChargeVA.com

Trade Ally (TA) Expectations

Small Business Direct Install (SBDI)

- TA must complete all provided training
- TA should be timely when working with a customer to schedule a project. Once a customer has expressed interest in the program and a project, the TA should contact the customer within 48 hours to begin scheduling
- TA must install all measures. Customer self-installation is not allowed.
- All customer-facing program materials and collateral must be approved.
- All projects must be entered into the TA portal. This should be in the provided training. If you have questions regarding the TA portal, please contact TRC. No turning away projects. TAs must be honest when listing areas willing to serve. If you listed a specific area to serve, then you must be willing to go there.

Trade Ally (TA) Expectations

Custom C&I (CCIP)

- TA must complete all provided training.
- All customer-facing program materials and collateral must be approved.
- TA should be timely when working with a customer and implementer to schedule a project. Once a customer has expressed interest in the program and a project, the TA should contact the customer within 48 hours to begin scheduling.
- Custom projects can take a longer time to install. TA should maintain communication throughout the process.
- C&I customers served at retail by Appalachian Power in Virginia who have not opted out of energy efficiency programs are eligible to participate in the Custom C&I Program. Non-Jurisdictional customers, such as those served under the Public Authority or Commonwealth of Virginia tariffs, are not eligible to participate in this program.

Trade Ally Agreement

It's simple!

- Request it
- Sign it
- Email it to Program Account Executive

TRADE ALLY PARTICIPATION AGREEMENT

1. Parties: This Trade Ally Participation Agreement ("Agreement") , is dated this xx of xx and is entered into between: xxxxxxx (hereinafter "Trade Ally") having its place of business at _____, and an official email of _____ and TRC Solutions, Inc. (hereinafter TRC or Program Implementer), having its place of business at 21 Griffin Road North, Windsor, Connecticut 06095 and to be collectively to be referenced as the "Parties."
2. Purpose and Scope. The purpose of this Agreement is to clearly identify the roles and responsibilities of the Trade Ally party and TRC as they relate to the installation of incentivized measures with Appalachian Power Company Virginia customers for the Commercial and Industrial <Business Energy Solutions, Program, Small Business Direct Install Program, C&I Custom Program> (hereinafter "Program(s)").


In particular, this Agreement is intended to:

- a. Define the relationship between the Trade Ally and TRC as the Program Implementer
- b. Identify TRC's role and its responsibility as the Program Implementer
- c. Establish the role and responsibility of the Program Trade Ally

Trade Ally Agreement

TA Application

- One application for the BES, SBDI, and Custom Programs
- Upload supporting documents:
 - W-9
 - Proof of insurances
 - Identification
 - Certifications
- Email us at TakeChargeSavings@trccompanies.com if you have not received the Trade Ally Application
- Sign and return the memorandum of understanding



[Welcome and Instructions](#)[Trade Ally Application](#)

Contact

1 Applicant Information

Indicate the Program(s) in which you will participate in as a Trade Ally (BES or SBDI) or within the Quality Contractor Network (HP)

☐ Business Energy Solutions (C&I)
☐ Small Business Direct Install (C&I)
☐ Home Performance (Residential)

Company Name * Address * City * State * ZIP Code *

Contact * Primary Phone * Email * Web Address

Tax ID Number * Years in Business * Years of Energy Efficiency Experience *

Insurance Information

	Insurer
General Liability	
Workers Comp	
Auto	

2 Business Type

Business Status (optional)

Non-certified Business <input type="checkbox"/>	Veteran Owned Business <input type="checkbox"/>	HUBZone Business <input type="checkbox"/>
Minority Owned Business <input type="checkbox"/>	Small Business Enterprise (SBE) <input type="checkbox"/>	LGBTQ+ Owned Business <input type="checkbox"/>
Woman Owned Business <input type="checkbox"/>	Small Business Disadvantaged Business <input type="checkbox"/>	

Diverse businesses must be certified by a third-party certifying agent

Services Offered

Lighting, Fixtures, and Controls <input type="checkbox"/>	Compressed Air <input type="checkbox"/>	Insulation (Residential) <input type="checkbox"/>
Refrigeration Equipment <input type="checkbox"/>	VFDs <input type="checkbox"/>	HVAC (Residential) <input type="checkbox"/>
Kitchen Equipment <input type="checkbox"/>	HVAC (C&I) <input type="checkbox"/>	

3 Team Information

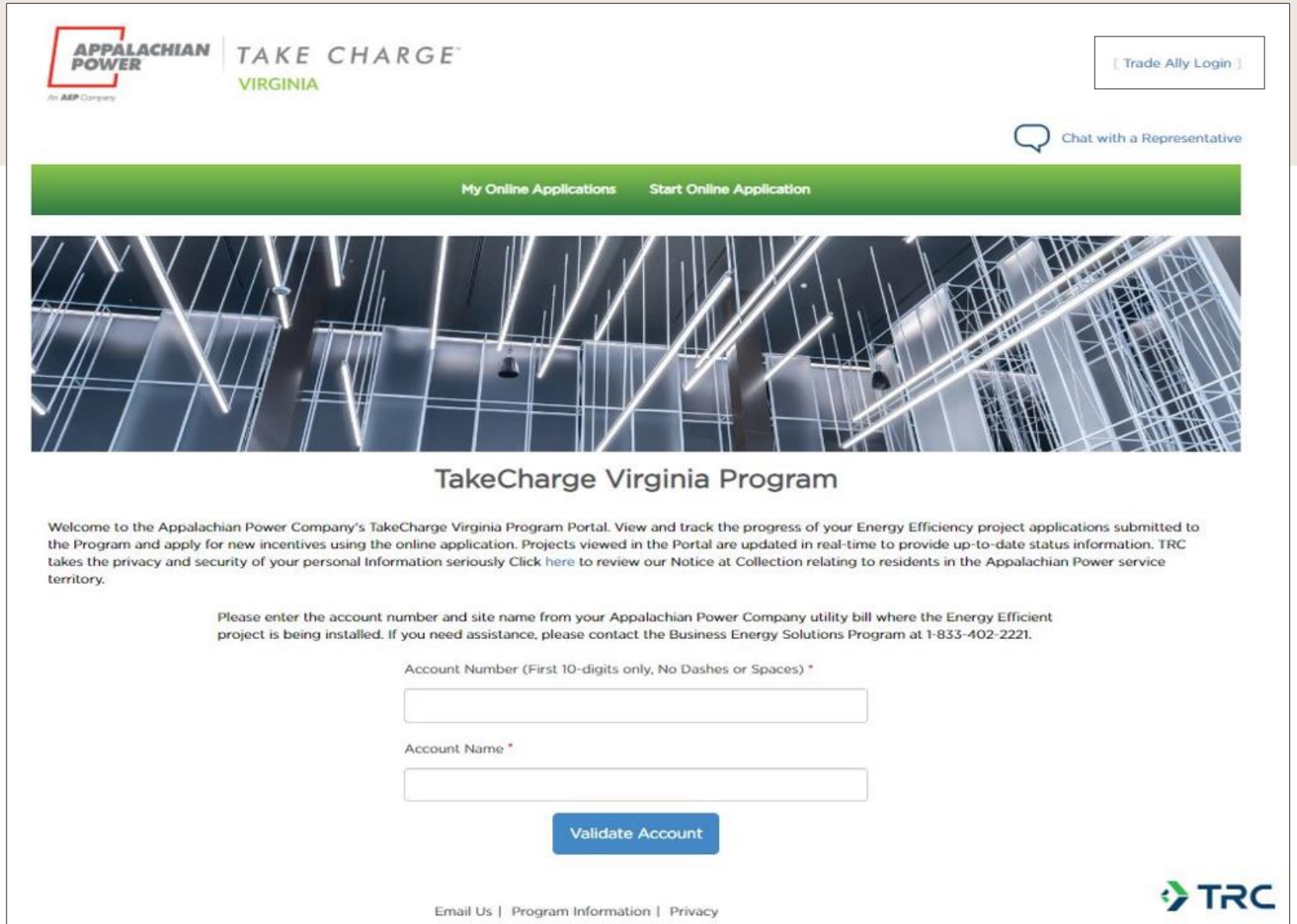
Identify all employees/sales team/subcontractors working with and on behalf of your company with the Program(s).

	Name(s) *	Title(s) *	Email(s) *	Primary Phone(s) *
1)				
2)				
3)				
4)				

Trade Ally Portal

Access

- Login from each Program
 - SBDI
 - BES
 - Custom



The screenshot shows the TakeCharge Virginia Program Portal. At the top left is the Appalachian Power logo with the text "TAKE CHARGE VIRGINIA" next to it. In the top right corner is a "Trade Ally Login" button. Below the header is a green navigation bar with "My Online Applications" and "Start Online Application" links. A large image of a modern building interior with glass and steel is featured. Below the image is the title "TakeCharge Virginia Program". The main text welcomes users to the portal, explaining that it allows them to view and track energy efficiency project applications and apply for new incentives. It also mentions that projects are updated in real-time and provides a link to the privacy policy. Below this is a form section with the instruction: "Please enter the account number and site name from your Appalachian Power Company utility bill where the Energy Efficient project is being installed. If you need assistance, please contact the Business Energy Solutions Program at 1-833-402-2221." The form has two input fields: "Account Number (First 10-digits only, No Dashes or Spaces) *" and "Account Name *". A blue "Validate Account" button is positioned below the fields. At the bottom of the page are links for "Email Us", "Program Information", and "Privacy", along with the TRC logo.

APPALACHIAN POWER | TAKE CHARGE[™] VIRGINIA

[Trade Ally Login]

Chat with a Representative

My Online Applications | Start Online Application

TakeCharge Virginia Program

Welcome to the Appalachian Power Company's TakeCharge Virginia Program Portal. View and track the progress of your Energy Efficiency project applications submitted to the Program and apply for new incentives using the online application. Projects viewed in the Portal are updated in real-time to provide up-to-date status information. TRC takes the privacy and security of your personal Information seriously Click [here](#) to review our Notice at Collection relating to residents in the Appalachian Power service territory.

Please enter the account number and site name from your Appalachian Power Company utility bill where the Energy Efficient project is being installed. If you need assistance, please contact the Business Energy Solutions Program at 1-833-402-2221.

Account Number (First 10-digits only, No Dashes or Spaces) *


Account Name *

Validate Account

Email Us | Program Information | Privacy

TRC

Trade Ally Portal (cont.)



TAKE CHARGE[™]
VIRGINIA



Welcome apcouser3 apco [Logout]

[My Online Applications](#) [My Projects](#) [Start Online Application](#) [Return to Home](#) [Validate Different Account/Site](#)

Online Applications

Welcome to the Appalachian Power Company's TakeCharge Virginia Program Portal. View and track the progress of your Energy Efficiency project applications submitted to the Program and apply for new incentives using the online application. Projects viewed in the Portal are updated in real-time to provide up-to-date status information. TRC takes the privacy and security of your personal Information seriously Click [here](#) to review our Notice at Collection relating to residents in the Appalachian Power service territory.


Search

Program	Company Name	Account Number	OLA Application Status	Application ID	Site Name	Address	City	Zip	Created On	Edit/View
BES	THE ORVIS COMPANY INC	0246294520	Approved	BES_1241351	THE ORVIS COMPANY INC	1711 Blue Hills Drive NE	Roanoke	24012	3/31/2022 8:16:36 PM	
BES	ZZ_Test Company DJS77	0123456789	Approved	BES_3674813	ZZ_Test Site DJS77	4001 Mayflower Drive	Lynchburg	24501	11/9/2023 8:38:14 PM	

Showing 1 to 2 of 2 entries

Previous 1 Next

[Email Us](#) | [Program Information](#) | [Privacy](#)



*The data shown is test data from the Staging environment

Overview

- Username
- View "My Online Applications"
- View "My Projects"
 - Manage participant applications
- Start/submit Online Application
- Upload Documents
- Manage participant appl

Assistance

- Need a username and password?
 - contact **Fran Phillips**
FPhillips@trccompanies.com

Trade Ally Portal (cont.)

Overview

- Username
- View "My Online Applications"
- View "My Projects"
 - Manage participant applications
- Start/submit Online Application
- Upload Documents
- Manage participant appl

Assistance

- Need a username and password?
 - contact **Fran Phillips**
FPhillips@trccompanies.com

The screenshot displays the Trade Ally Portal interface. At the top, the Appalachian Power logo is on the left, and 'TAKE CHARGE VIRGINIA' is on the right. A green navigation bar contains links: 'My Online Applications', 'My Projects' (highlighted in red), 'Start Online Application', and 'Return to Home'. Below the navigation bar is a search bar. The main content area is titled 'TRC-Test Active Projects' and contains a table with 10 columns: Program, Project Number, Address, Project Start Date, Estimated Completion Date, Estimated Incentive, kWh Savings, kW Savings, Status, and an action column. The table lists three projects, all with the address '4001 Mayflower Drive, Lynchburg, VA 24502'. The first and third projects are in 'Under Review' status, while the second is in a pending state. Each row has an 'Upload Docs' button. Below the table, it says 'Showing 1 to 3 of 3 entries' with 'Previous' and 'Next' navigation links. Below this is a section for 'TRC-Test Inactive Projects' with a similar table structure.

Program	Project Number	Address	Project Start Date	Estimated Completion Date	Estimated Incentive	kWh Savings	kW Savings	Status	
BES	BES2023_003874	4001 Mayflower Drive, Lynchburg, VA 24502	12/12/2023		\$1,368.00	22,632.00	3.29	Under Review	Upload Docs
BES	BES2023_003875	4001 Mayflower Drive, Lynchburg, VA 24502	12/12/2023	01/31/2024	\$684.00	11,316.00	1.64		Upload Docs
BES	BES2023_003884	4001 Mayflower Drive, Lynchburg, VA 24502	01/11/2024		\$1,368.00	22,632.00	3.29	Under Review	Upload Docs

*The data shown is test data from the Staging environment



Energy Efficiency Pays in Cash Back

To Appalachian Power's Business Customers in Virginia

In today's competitive marketplace, businesses of all sizes need to make every dollar count. Making your business more energy efficient is one practical way to save money while improving productivity and boosting workplace efficiency.

The Appalachian Power Business Energy Solutions program provides cash rebates and technical assistance for virtually any cost-effective energy efficiency project. Whether you're running a small business or large corporation, your company may qualify to receive cashback for improvements to your facility's lighting and controls, ventilation, cooling systems, refrigeration and kitchen equipment, and more.

WHY USE ENERGY-EFFICIENT TECHNOLOGY?

As the lowest-cost resource, energy efficiency provides numerous benefits to both you and your customers. Installing more efficient equipment while utilizing Appalachian Power rebates can help your business:

- Reduce long-term costs by reducing energy use
- Achieve greater ROI through reduced investment
- Reduce environmental impact
- Provide a more comfortable environment for employees and customers

COMMON ENERGY-EFFICIENT EQUIPMENT UPGRADES

Lighting

LED replacements for fluorescent lamps can pay for themselves in energy savings within a year.

HVAC

Replace inefficient HVAC systems because heating and cooling costs account for as much as 40% of the average commercial building's electricity cost.

VFDs

Installing variable frequency drives (VFDs) on fixed-speed fans and pumps can save 10-50% in energy costs.

Compressed Air

Upgrade to high-efficiency compressors and dryers and install energy-saving items such as no-loss drains.

Refrigeration

Install anti-sweat heater controls and ENERGY STAR® glass or solid door freezers to save energy and money.

Kitchen

ENERGY STAR qualified products are often 15-30% percent more energy efficient and does not have a negative impact on food quality.



833-402-2221

TakeChargeSavings@trccompanies.com

TakeChargeVA.com

Marketing

One Pagers

- BES
- SBDI
- Custom C&I
- Overview Tri-Fold (BES, SBDI, & HP)
- Air Compressor
- Commercial Kitchen (BES)
- Commercial Kitchen (SBDI)



**SAVE MONEY AND ENERGY WITH APPALACHIAN POWER'S
ENERGY EFFICIENCY PROGRAMS FOR BUSINESSES**

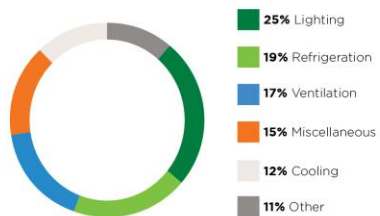


**ENERGY SAVINGS FOR
RETAIL SPACES**

Create a welcoming space for your customers and save energy with a project through Appalachian Power. By investing in energy efficiency, you can save money, save energy, and make your retail space more comfortable and eye-catching. You'll also be able to increase your reputation in the community as a sustainability leader, which could lead to an expanded customer base!

The TakeChargeVA Program can assist you with custom energy efficiency projects in your retail space. We provide financial incentives for new energy efficient equipment and act as your trusted energy advisor. We can even help with paperwork, so you can focus on your customer base and boost the bottom line.

HOW RETAIL SPACES USE ENERGY:



Visit: [TakeChargeVA.com/Business](https://www.takechargeva.com/Business)
Call: 833-402-2221

Appalachian Power values your privacy.



KEY WAYS TO SAVE:

- LED lighting
- HVAC maintenance
- Commissioning
- Insulation
- Vending machine controls
- Automation systems

**AN ENERGY EFFICIENCY
PROJECT COULD HELP YOU:**

- Increase customer comfort
- Make your retail space brighter
- Boost your reputation for sustainability
- Attract new customers

START SAVING TODAY!

We encourage you to explore further ways to reduce your energy use – and our program can help! If you have additional questions, please visit [TakeChargeVA.com/Business](https://www.takechargeva.com/Business) or call 833-402-2221.

Marketing

Case Study

- Rescue Mission

Fact Sheets

- Medical
- Commercial Buildings
- Data Centers
- Manufacturers
- PRSV
- Restaurants
- Retailers
- Hotel and Lodging



TAKE CHARGE[™]
VIRGINIA

APCo TRC Team Resources



Business Energy Solutions (BES)

- ✓ BES-Case-Study-Rescue-Mission
- ✓ BES-Commercial-Kitchen-Flyer
- ✓ BES-Compressed-Air-Systems-Flyer
- ✓ BES-General-Overview-Flyer
- ✓ BES-Hotel-and-Lodging-Flyer
- ✓ BES-Manufacturing-Flyer
- ✓ BES-Incentive-Guide-2024
- ✓ BES-Medical-Facilities-Flyer
- ✓ BES-Pre-Rinse-Spray-Valve-Flyer
- ✓ BES Leave Behind Card
- ✓ BES Commercial Buildings Flyer
- ✓ BES Data Centers Flyer

Marketing

Download all of these and more
on our resource website.

No login required.

Visit: APCoTRCteam.com



An AEP Company

TAKE CHARGE™

VIRGINIA

—
Questions?

QUESTIONS?

ANSWERS!

We're here to help!



TODD EWALD

Commercial Account Manager

Programs: BES, SBDI, Custom
tewald@trccompanies.com
540-655-8452



KALEIGH MASON

Commercial Account Manager

Programs: BES, SBDI, Custom
ksmason@trccompanies.com
910-444-8629



KENNEDY NWABIA

Commercial Account Manager

Programs: BES & SBDI
knwabia@trccompanies.com
833-402-2221



JEFF LINEBERRY

Residential Account Manager

Programs: HP
jlineberry@trccompanies.com
276-266-5338

Program Email: TakeChargeSavings@trccompanies.com

Program Toll Free Number: 1- 833-402-2221



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THANK YOU

