

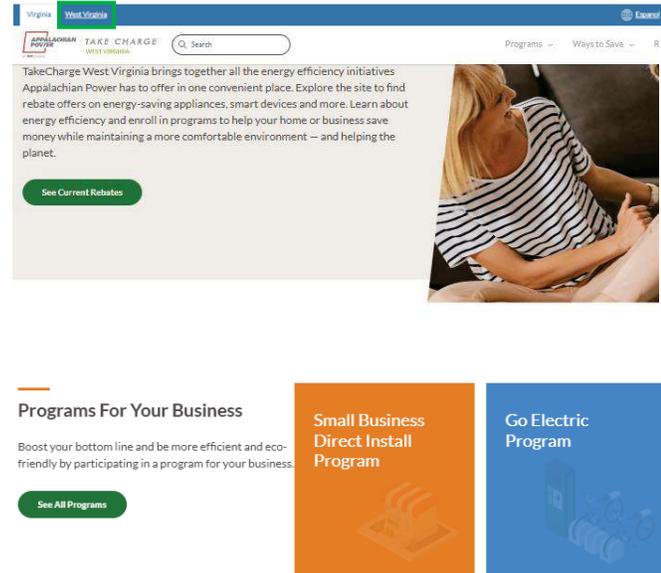
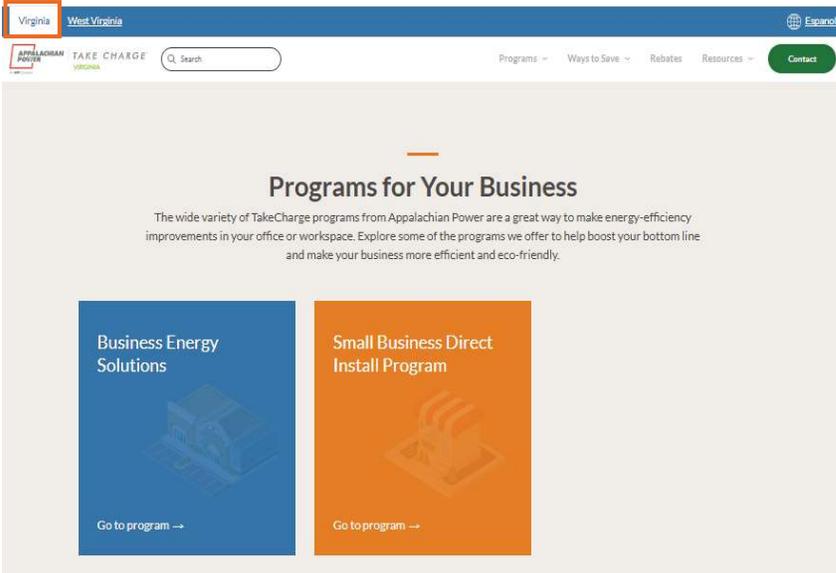
Appalachian Power TakeCharge Rebate Program

On-line Application (OLA) Process – Job Aid

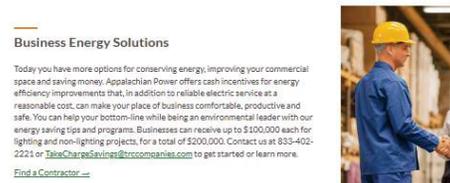
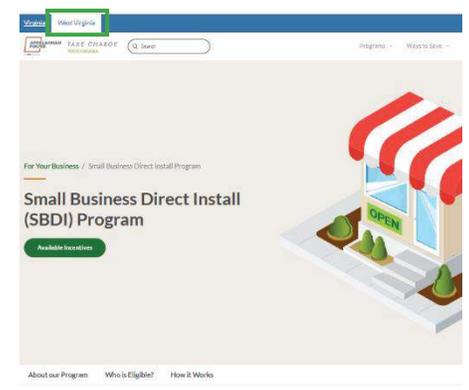
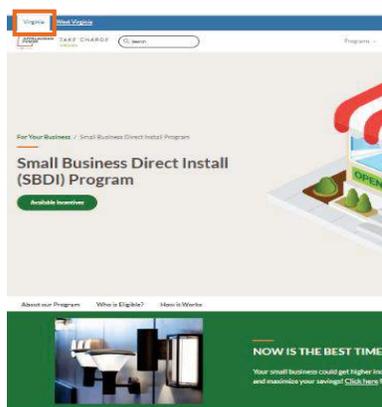
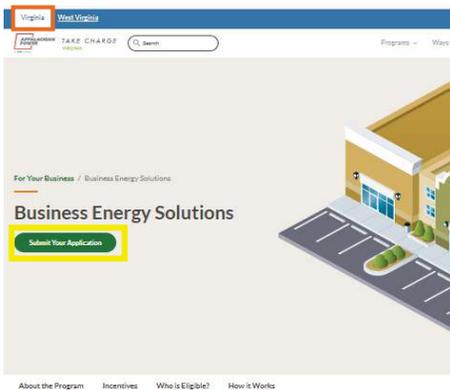
TakeCharge Websites:

Virginia: [TakeCharge VA | Programs For Your Business](#)

West Virginia: [TakeCharge WV | Home](#)



- Choose the correct Program
 - Virginia Business Energy Solutions (BES)
 - Virginia Small Business Direct Install (SBDI)
 - West Virginia Small Business Direct Install (SBDI)



OR



OR



- Click "Submit Your Application"

• If you are not a **Trade Ally** skip to page 5

• **TRADE ALLY** – Click on the "Trade Ally Login" in upper right-hand corner of screen.

If you need a username and password, contact Fran Phillips at: FPhillips@trccompanies.com

Manage participant applications:

- View "My Online Applications"
- View "My Projects"
- Start/submit Online Application
- Upload Documents

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	

Here is a view when you click on “My Projects” to view customer projects

- View Customer projects that have been submitted

The screenshot shows the 'My Projects' page in the Take Charge Virginia portal. The 'My Projects' link in the top navigation bar is circled in blue. Below the navigation bar is a search bar. The main content area is titled 'TRC-Test Active Projects' and contains a table with the following data:

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

Below the table, it says 'Showing 1 to 3 of 3 entries' and includes 'Previous' and 'Next' navigation buttons.

Below the active projects section is the 'TRC-Test Inactive Projects' section, which has a table header but no data rows are visible.

*The data shown is test data from the Staging environment

The screenshot shows the 'Online Applications' page in the Take Charge Virginia portal. The 'Start Online Application' link in the top navigation bar is circled in red. Below the navigation bar is a search bar. The main content area is titled 'Online Applications' and contains a welcome message and a table with the following data:

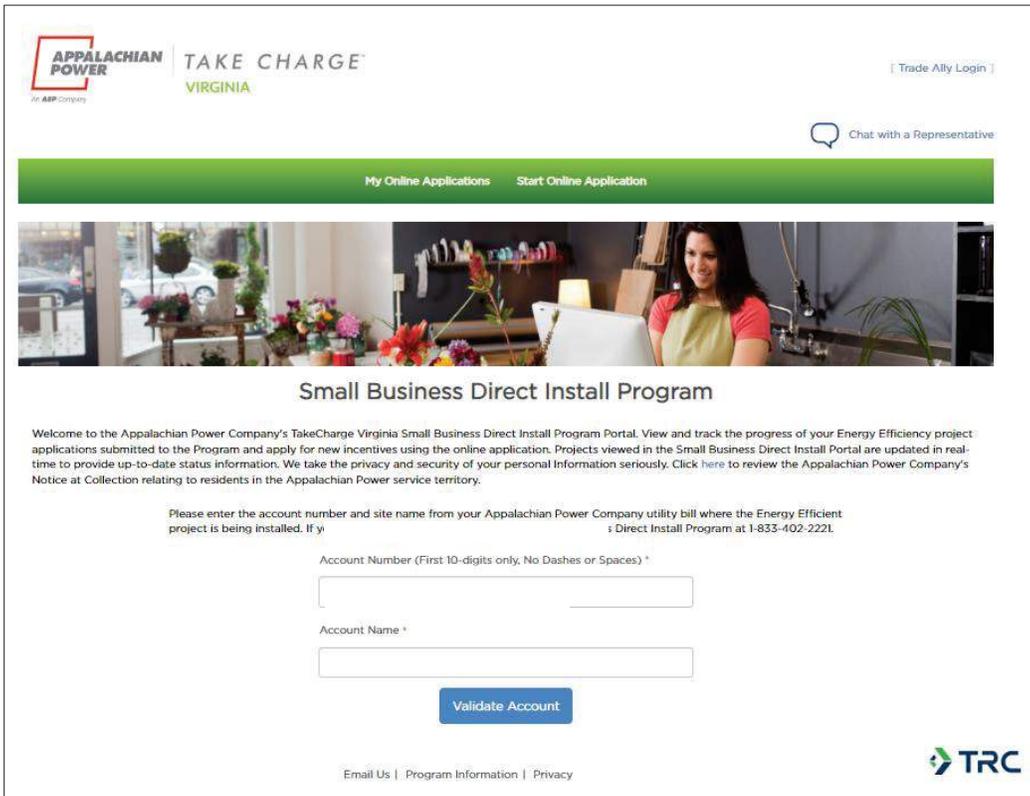
Welcome to the Appalachian Power Company's TakeCharge Virginia Program Portal. View and track the progress of your Energy Efficiency project applications submitted to the Program and apply for new incentives using the online application. Projects viewed in the Portal are updated in real-time to provide 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.

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	Edit/View
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	Edit/View

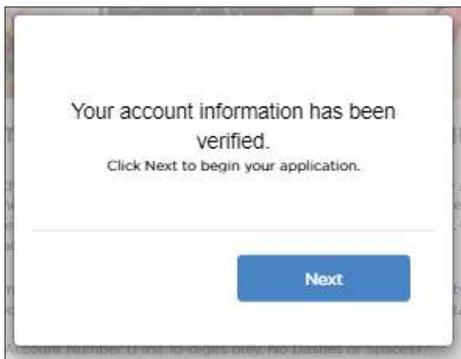
Below the table, it says 'Showing 1 to 2 of 2 entries' and includes 'Previous' and 'Next' navigation buttons.

At the bottom of the page, there are links for 'Email Us', 'Program Information', and 'Privacy', along with the TRC logo.

- Click on “Start Online Application”



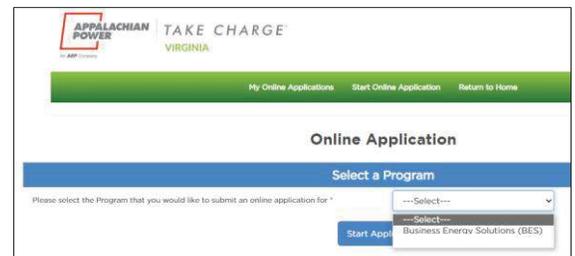
- Enter 10-digit account number (starts with a zero)
- Enter Account Name
(Must be exactly how it is on the customer bill – if you need assistance, please contact a program representative)
- Click “Validate Account”



- Click “Next”



OR



- Small Business Direct Install (SBDI): Start Online Application – to start a new application
- Business Energy Solutions (BES):
 - select program from drop down
 - Click “Start Application”
- My Online Application – to view all applications for an account (started or submitted)

Company and Site Information Customer Contact Information QEC Trade Ally/Project Contributor Payee Information Measures File Upload Review and Submit

Company Information

For the purposes of this application, "Company" is the headquarters or primary office that is the owner of the site where the project is being implemented.
* denotes a required field.

I am completing this application as the * Trade Ally on behalf of a customer ▼

Company Name *

Address Search

Company Address:

Address *	<input style="width: 100%;" type="text"/>	Address 2 <input style="width: 100%;" type="text" value="B UNIT"/>
City *	<input style="width: 100%;" type="text" value="Roanoke"/>	State * <input style="width: 100%;" type="text" value="VA"/>
ZIP *	<input style="width: 100%;" type="text"/>	

Have you Installed or Purchased Equipment? * Yes No: Installed Date *

Site Information

Site Name *

Address Search

Site Address:

Address *	<input style="width: 100%;" type="text"/>	Address 2 <input style="width: 100%;" type="text"/>
City *	<input style="width: 100%;" type="text" value="ROANOKE"/>	State * <input style="width: 100%;" type="text" value="VA"/>
ZIP *	<input style="width: 100%;" type="text"/>	

Account Number 1 (No Dashes or Spaces) *	Account Number 2 (No Dashes or Spaces)
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Account Number 3 (No Dashes or Spaces)	Account Number 4 (No Dashes or Spaces)
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Building Type *	Occupancy Status *
<input style="width: 100%;" type="text" value="Dining: Family"/> ▼	<input style="width: 100%;" type="text" value="Owner"/> ▼
Annual Operating Hours *	Year Built *
<input style="width: 100%;" type="text" value="2,860"/>	<input style="width: 100%;" type="text" value="2000"/>
Square Footage	Number of Floors
<input style="width: 100%;" type="text" value="0"/>	<input style="width: 100%;" type="text" value="0"/>
Water Heating Type *	Number of Employees *
<input style="width: 100%;" type="text" value="Electric"/> ▼	<input style="width: 100%;" type="text" value="1-10"/> ▼
Space Conditioning Type *	How Did You Hear About the Program? *
<input style="width: 100%;" type="text" value="AC with Electric Heat"/> ▼	<input style="width: 100%;" type="text" value="Contractor"/> ▼

Next

- Company Information: The headquarters or primary office that is the *owner* of the site where the project is being done
- Site Information: the address where the project is being installed

Company and Site Information **Customer Contact Information** QEC Trade Ally/Project Contributor Payee Information Measures File Upload Review and Submit

Contact Information

Primary Contact

The Primary Contact is the individual most knowledgeable about the project and whom the Appalachian Power Company SBDI team may contact in the event of an on-site inspection. The Primary Contact is responsible for signing the application through Adobe Sign. Note that if the Primary Contact is an individual from an organization outside of the account holder's organization, a Letter of Authorization will be requested. The Primary Contact may be the same as the Customer Contact. This person will also be included in workflow emails.

Company Name *

First Name * Last Name *

Title * Phone *

Email *

Customer Contact

The Customer Contact is the individual who is authorized to make the decision to move forward with the energy efficiency project and who is affiliated with the site that is applying.

123 Main St., Roanoke, VA 10150

Is the Customer Contact the same as the Primary Contact?

Company Name *

First Name * Last Name *

Title * Phone *

Email *

Please enter a valid email address.

- *Use customers email so they can complete the e-signature.
 - Once application is submitted the customer will receive an email from "APCO Prod <echosign@echosign.com ", customer will need to open it and complete the e-signature.

NOTE: The Trade Ally's email should only be entered on this tab if they have a Letter of Authorization (LOA) from the customer that states the TA can sign the Energy Efficiency application(s) on the customer's behalf.

The "QEC" TAB is only for Virginia SBDI projects – it will not be there in the BES Portal

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

Kitchen QEC

Add Kitchen QEC

Equipment Type	Commercial/Residential	Fuel Type	Qty	Approx. Age	Condition
Select	Select	Select	0	Select	Select

- Use the Kitchen QEC category and the drop down for Pre-rinse Spray Valve.

Recommendations

Recommended for You

Kitchen and Refrigeration Measures	
Install pre-rinse spray valves	<input checked="" type="checkbox"/>
Replace worn gaskets on refrigerators or freezers	<input checked="" type="checkbox"/>
Install night covers on refrigerators or freezers	<input type="checkbox"/>

- If any other recommendations are made to the customer while TA is on-site, they should be added on this QEC tab showing *existing* equipment type.
- The Customer will receive a copy of the QEC, so they can continue to improve their buildings energy efficiency with other measures.

Company and Site Information
Customer Contact Information
QEC
Trade Ally/Project Contributor
Payee Information
Measures
File Upload
Review and Submit

Trade Ally Information

Is there a Trade Ally or Vendor for this Project? * Yes No

Select a Trade Ally

---Select---

Trade Ally/Vendor Company Name *

Trade Ally Type * ---Select---

Contact Information:

First Name *	<input type="text"/>	Last Name *	<input type="text"/>
Title	<input type="text"/>	Email *	<input type="text"/>
Primary Phone *	<input type="text"/>	Second Phone	<input style="background-color: #f0f0f0;" type="text"/>
Address Search	<input style="background-color: #f0f0f0;" type="text" value="Please provide address"/>		

Address:

Address *	<input type="text"/>	Address 2	<input style="background-color: #f0f0f0;" type="text"/>
City *	<input type="text"/>	State	<input style="width: 150px;" type="text"/>
ZIP *	<input type="text"/>		

Other Project Contributor

A project contributor is any subcontractor, community partner, or trade ally that has a significant role in the development or installation of the project, but is not the vendor or main trade ally.

Is there a Project Contributor for this project? * Yes No:

Previous
Save For Later
Next

- Trade Ally Information: If you choose a Trade Ally name from the drop down all required fields should populate.

Other Project Contributor

A project contributor is any subcontractor, community partner, or trade ally that has a significant role in the development or installation of the project, but is not the vendor or main trade ally.

Is there a Project Contributor for this project? * Yes No:

Organization *

Contact Information:

First Name *	<input type="text"/>	Last Name *	<input type="text"/>
Title *	<input type="text"/>	Email *	<input type="text"/>
Primary Phone *	<input type="text"/>	Secondary Phone	<input style="background-color: #f0f0f0;" type="text"/>
Address Search	<input style="background-color: #f0f0f0;" type="text" value="Please provide address"/>		

Address:

Address *	<input type="text"/>	Address 2	<input style="background-color: #f0f0f0;" type="text"/>
City *	<input type="text"/>	State *	<input style="width: 150px;" type="text"/>
ZIP *	<input type="text"/>		

Previous
Save For Later
Next

- Other Project Coordinator: If YES, fill in required fields.

Company and Site Information Customer Contact Information QEC Trade Ally/Project Contributor **Payee Information** Measures File Upload Review and Submit

Payee Information

Enter the Payee Information below. Some information may be auto-filled based on your selection, but you may overwrite the data if necessary. Payee Company Name and Tax ID Number must match federal documents exactly.

Payment Type *	---Select---	Tax Entity *	---Select---
Company Name *	<input type="text"/>	Federal Tax ID Number *	<input type="text"/>
Customer Contact - First Name *	<input type="text"/>	Last Name *	<input type="text"/>
Phone *	<input type="text"/>	Confirm Email *	<input type="text"/>
Email *	<input type="text"/>		

Address:

Address *	<input type="text"/>	Address 2	<input type="text"/>
City *	<input type="text"/>	State *	<input type="text"/>
ZIP *	<input type="text"/>		

Previous
Save For Later
Next

- Enter payee’s information *exactly* as it is on the W9 (don’t forget comma’s, period’s, etc.).
- Once you hit the “Next” button it will validate
 - If you receive an error message, fix and then hit “Next” again
 - If the incentive check is to be mailed to a different address than what is on the W9, contact the TakeCharge program and reference your application number in the subject line.
 - Virginia: TakeChargeSavings@trccompanies.com
 - West Virginia: WestVirginiaTakeCharge@trccompanies.com

Company and Site Information Customer Contact Information QEC Trade Ally/Project Contributor Payee Information **Measures** File Upload Review and Submit

Measure Summary

Prescriptive	Category	Measure Group	Efficient Equipment	Installed Location	Quantity	Estimated Incentive	Estimated kWh Saved	Action
No data available in table								

Showing 0 to 0 of 0 entries Previous Next

Prescriptive	Category	Measure Group	Efficient Equipment	Installed Location	Quantity	Estimated Incentive	Estimated kWh Saved	Action
No data available in table								

Showing 0 to 0 of 0 entries Previous Next

Previous
Add Measure
Save For Later
Next

- Click “Add Measure”

Company and Site Information Customer Contact Information QEC Trade Ally/Project Contributor Payee Information **Measures** File Upload Review and Submit

Category * Lighting

Measure Group * Linear Lamp

Efficient Equipment * LED Linear Replacement Lamp: 4 ft

Manufacturer * Sylvania Model Number * LED17T8L48FG850BFG2

Location * dining room Efficient Quantity * 80

Building Category * All Other Area Space * Dining Area

AC and Heating Source * AC / Electric Resistance Heat Lighting Hours per Day * 9

Lighting Days per Week * 6 Weekdays Per Year Lights are OFF * 5

Existing Lamp Watts * 32.00 Certifying Authority * DLC

DLC Product ID or Energy Star Unique ID * PB1V5QRE Watts per EE Fixture or Lamp * 17.00

Lamps per Fixture * 4 Lamp Type * T8, Type A

Lumens per EE Fixture or Lamp * 2,200 Rated Life Expectancy (Hours) * 50,000

Total Equipment Cost * \$ 2500 Total Labor Cost * \$ 3000

Calculation Fields (Read Only)

Estimated kWh Saved	2,914.608000	Total Incentive	\$ 582.92	Total Measure Cost	\$ 5,500.00
Estimated kW Saved	0.845880	Quantity Type	Lamp	Incentive Rate	\$ 15.00
Estimated Lifetime kWh Saved	43,719.120000	Measure Number	SBDI-L-2022-42		

- Use the drop down for Category, Measure Group and Efficient Equipment.
- Click “Add” to save the measure

Company and Site Information Customer Contact Information QEC Trade Ally/Project Contributor Payee Information **Measures** File Upload Review and Submit

Measure Summary

Prescriptive	Category	Measure Group	Efficient Equipment	Installed Location	Quantity	Estimated Incentive	Estimated kWh Saved	Action
SBDI	Lighting	Linear Lamp	LED Linear Replacement Lamp: 4 ft	dining room	80	\$582.92	2,914.61	

Showing 1 to 1 of 1 entries Previous 1 Next

The measure just entered should be in the summary now.

- Click “Add Measure” to enter another measure for the project.
- Click “Next” when done entering all measures.

Company and Site Information Customer Contact Information QEC Trade Ally/Project Contributor Payee Information Measures **File Upload** Review and Submit

Upload Project Documents

Attached files should be in jpg, gif, png, bmp, tif, doc, docx, xls, xlsx, or pdf format, and should be no larger than 3 MB.

File Name	File Type
Invoice.pdf	Material and Labor Invoices
SBDI On-Site Customer TCs Acknowledgement Form- Example #1 Company.pdf	Other
Spec Sheet_ LED17T8	Specification Sheets
W9.pdf	Payee Company's W-9

Showing 1 to 4 of 4 entries Previous 1 Next

Recommended:

1. Specification Sheets
2. Photo of Existing Equipment
3. Calculations or Model Output
4. Proposal or Quote
5. Specification Sheets
6. Utility Bills for the Last 12 Months
7. Material and Labor Invoices

If Applicable:

1. Letter of Authorization
2. Tax Exempt Letter
3. Payee Company's W-9
4. Other

Click here to select file(s)

Continue to Upload Files

Previous Save For Later Next

- Click “Click here to select file(s)” - select files to upload from File Explorer (easier to put all documents in a folder, select all of them at one time and upload together)
 - **Items to be uploaded:** see above screen shot
- Once File Names are in the box, use the drop down to select the “File Type” for each attachment.
- Click “Continue to Upload Files” button
- Click “Next”

Company and Site Information Customer Contact Information QEC Trade Ally/Project Contributor Payee Information Measures File Upload **Review and Submit**

Completion Checklist

Company and Site Information	Complete
Customer Contact Information	Incomplete
Quick Energy Check	Incomplete
Trade Ally/Project Contributor	Incomplete
Payee Information	Incomplete
Measures	Incomplete: measure required to be submitted
File Upload	Complete

Next Steps

- Please complete any missing sections in the application. Once all the sections are complete, then you can continue to sign the Terms and Conditions.
- Please feel free to contact us with any questions about this project or any other project.
 - Toll free: 1-833-402-2221
 - TakeChargeSavings@trccompanies.com

- Fix any incomplete required fields by clicking on the appropriate TAB

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

SBDI Online Application

Company Name: Example ABC Company Application ID: SBDI_6543210
 Application Status: In Progress-not Submitted Site Name: Example ABC Company
 Estimated Incentive: \$582.92 Estimated kWh Saved: 2,914.61

Company and Site Information Customer Contact Information QEC Trade Ally/Project Contributor Payee Information Measures File Upload Review and Submit

Completion Checklist

Company and Site Information	Complete
Customer Contact Information	Complete
Quick Energy Check	Complete
Trade Ally/Project Contributor	Complete
Payee Information	Complete
Measures	Complete
File Upload	Complete

Next Steps

- Click Next to view the Terms & Conditions and send them to an authorized Small Business Direct Install Program customer for signature. You will receive a confirmation email that the application has been submitted once the Terms & Conditions are signed.
- As part of our commitment to achieved realized savings, all projects are subject to random inspections. If you receive a visit from one of our inspectors, they will refer to this project, ask a few questions, and perform a verification.
- Please feel free to contact us with any questions about this project or any other project.
 - o Toll free: 1-833-402-2221
 - o TakeChargeSavings@trccompanies.com

Next

- Once all required fields are completed, each TAB will say complete
- Click “Next”

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

SBDI Online Application

Company Name: Example ABC Company Application ID: SBDI_6543210
 Application Status: In Progress-not Submitted Site Name: Example ABC Company
 Estimated Incentive: \$582.92 Estimated kWh Saved: 2,914.61

Company and Site Information Customer Contact Information QEC Trade Ally/Project Contributor Payee Information Measures File Upload Review and Submit

Application Summary Review & Terms and Conditions

Company Information

Company Name Example ABC Company Installed Date 6/2/2023	Address 123 Main St., Roanoke, VA 10150 Planned Install Date
---	--

Site Information

Site Name Example ABC Company Address 1 123 Main St., Roanoke, VA 24001 # of Employees 1-10 Building Type Dining: Family Annual Operating Hours 2860 Space Conditioning	Account #1 0123456789 Address 2 Hear About the Program Contractor Occupancy Status Owner Year Built 2000 Water Heating Electric
---	---

Contact Information

Company Name Example ABC Company Phone (540) 555-1212	Primary Contact Jane Doe Email janedoe@exampleabcco.com	Title OWNER
Company Name Example ABC Company Phone (540) 555-1212	Customer Contact Jane Doe Email janedoe@exampleabcco.com	Title OWNER

and the remaining terms and conditions shall remain in full force and effect in accordance with their terms. Resolution of disputes concerning these terms and conditions, or any other requirement of this application or condition of incentive award, shall be governed in all respects by the laws of the jurisdiction in which the customer is located.

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 APCo account number(s) on this application.
- TRC and APCo are authorized to access energy usage data for the specified accounts at the physical site address of the Project listed above, and to release the data to the Trade Ally listed on this application.
- TRC and APCo are authorized to include the Customer's name, city, or county of business, Program services/incentives, and resulting energy savings in reports or other documents submitted to APCo and agencies administering energy efficiency programs.
- This application includes complete and accurate information about the Customer, the Project scope, and the estimated total Project cost for this site, including all costs for materials, labor, shipping, and sales tax.
- 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 Application, an agreement is formed between TRC and Customer that incorporates the Program Rules, Requirements, Terms, and Conditions.
- Program offerings, including incentive payments and availability, are subject to change without notice.
- My electronic signature below has the same force and effect as an original manual signature.

Previous

Submit Application

- Review all information for accuracy. Edit any information in each tab if necessary.
- Once reviewed and satisfied with information click "Submit Application".



TAKE CHARGE™



[Trade Ally Login]

My Online Applications Start Online Application Return to Home Validate Different Account/Site

Small Business Direct Install

Company Name:	Example ABC Company	Application ID:	SBDI_6543210
Application Status:	Awaiting Customer Signature	Site Name:	Example ABC Company
Estimated Incentive:	\$582.92	Estimated kWh Saved:	2,914.61

Confirmation Page

Thank you for submitting your SBDI Incentive Application! Your application ID SBDI_6543210.

Next Steps

- Look for an email from Adobe Sign requesting a signature. The email will be sent to the Primary Contact noted in the application. You will receive a confirmation email that the application has been submitted once it has been reviewed, the Terms and Conditions accepted, and the application signed.
- As part of our commitment to achieved realized savings, all projects are subject to random inspections. If you receive a visit from one of our inspectors, they will refer to this project, ask a few questions, and perform a verification.
- Please feel free to contact us with any questions about this project or any other project.
 - Toll free: 1-833-402-2221
 - TakeChargeSavings@trccompanies.com

Email Us | Program Information | Privacy

- Verify that you received a Confirmation Page
- Make note of Application ID: SBDI_6543210 (use this number to communicate with program staff if there are any questions regarding status, etc.)
- Once the application is approved and turned into a PROJECT, you should receive an automatic email notification with updating you on the status of the project