

## Trade Ally Quality Application Bonus

### BONUS OVERVIEW

The Trade Ally Quality Application Bonus seeks to reward Trade Allies who demonstrate superior customer service by completing and submitting application paperwork for their customers.

Between Feb. 21, 2022 and Nov. 30, 2023, eligible Trade Allies can accrue financial bonuses for preparing and submitting complete (error free) pre-applications and final applications, on behalf of their customers, for projects that result in a paid incentive of at least \$1,000 prior to applying eligible bonuses. All final applications must be submitted by Nov. 30, 2023 to be eligible for the bonus. The amount of the bonus will be determined by the amount of the paid incentive for each eligible final application.

Quality Application Bonuses are calculated according to paid incentives and whether a pre-application and final, or final-only, application is submitted. Final-only applications will receive 50% of the available bonus. An extra \$50 or \$100 bonus will be applied for submitting through the Online Application website. See table below for Quality Application Bonus dollars.

Bonus dollars will be paid quarterly, with a check payable to the Trade Ally Company listed as the Technical Contact/Contractor Information field of the PDF Incentive Application/Online Application. The check amount will reflect the sum of a Trade Ally's accrued quarterly bonus for all qualifying pre-applications and final applications reviewed between Feb. 21, 2022 and Nov. 30, 2023. Any final application submitted by a Trade Ally prior to Feb. 21, 2022 or after Nov. 30, 2023 will not qualify for this bonus. Any projects previously applied for and cancelled, even if re-submitted will not qualify for this bonus.

TRADE ALLY QUALITY APPLICATION BONUS				
Total Incentive Paid	Pre- and Final PDF	Final Only PDF	Pre- and Final Online Application	Final Only Online Application
\$1,000 — 4,999	\$100	\$50	\$200	\$100
\$5,000 — 9,999	\$500	\$250	\$600	\$300
\$10,000 — 19,999	\$1,000	\$500	\$1,100	\$550
\$20,000 and up	\$2,000	\$1,000	\$2,100	\$1,050

### ELIGIBILITY

Eligible participants in the Trade Ally Quality Application Bonus Program must:

- Be or become a Trade Ally in good standing and remain in good standing throughout the 2023 program year.
- Become a Trade Ally, [here](#). After receiving the Trade Ally designation and submitting a qualifying application, the bonus can be applied.
- Submit a Quality Application Bonus Review Form with the pre-application as a separate document or upload it to "additional documents" of the Online Application when submitting the pre-application. If a pre-application is not required, submit the Quality Application Bonus Review Form (last page of this document) when submitting the final-only application.

## **BONUS REQUIREMENTS**

The following requirements must be met before a pre-application (when applicable) and final application can qualify for a Consumers Energy Trade Ally Quality Application Bonus:

- The pre-application (when applicable) and final application must include all required documentation, information, and signatures at the time of submittal (see form on last page).
- The pre-application (when applicable) and final application must be filled out and submitted by the Trade Ally, on behalf of the customer, through the Trade Ally's Online Application account or the PDF delivered by the Trade Ally's email address, fax number or return mailing address.
- The Trade Ally's company information must be listed in the "Technical Contact/Contractor Information" field of the PDF application/Online Application.
- The application(s) must result in a paid project.
- Pre-applications, when applicable must be submitted and reserved before final applications are submitted.
- Applications are ineligible if submitted for the same location within 60 days.
- If any required documentation is missing, additional information requested by the Consumers Energy Business Efficiency Program team must be provided within two (2) business days of the request. No exceptions, past two (2) business days will result in a fail.
- Incomplete applications and applications submitted directly by customers or subcontractors will not qualify for a Trade Ally Quality Application Bonus.

The Consumers Energy Trade Ally Quality Application Bonus Program may be combined with other Consumers Energy Business Energy Efficiency Program bonus offerings. However, Quality Application Bonuses are calculated from the paid base incentive total, which does not include eligible bonuses.

## **OFFICIAL RULES**

These bonus dollars can be combined with any other rewards and bonus programs offered by Consumers Energy Business Energy Efficiency Programs. Bonuses are subject to all applicable federal, state, and local laws and regulations and is void where prohibited.

- Compliance with Consumers Energy Business Energy Efficiency Programs Requirements
  - Participants in the Consumers Energy Business Energy Efficiency Programs shall comply with these Official Rules requirements, terms and conditions of the Consumers Energy Business Energy Efficiency Programs, as set forth in the Consumers Energy Business Energy Efficiency Programs incentive applications and related program documents.
- Bonus Payment
  - Bonuses will be calculated as the Final Application(s) arrive and is paid to the Trade Ally Company listed as the Technical Contact/Contractor Information field of the PDF Incentive Application/Online Application.
  - Consumers Energy reserves the right to cancel, suspend and/or modify this bonus, or any part of it, if any fraud, technical failures, or any other factor impairs the integrity or proper functioning of the bonus, as determined by Consumers Energy in its sole discretion. Consumers Energy, in its sole discretion, reserves the right to disqualify any entrant it determines to be violating the Official Rules.

- Inspections
  - Consumers Energy reserves the right to inspect all participating Trade Allies' and contractor's projects to verify sales transactions, compliance with program rules and accuracy of project documentation.
  - Any failed inspections will result in the Trade Ally/contractor being disqualified for the bonus.
  - A failed inspection is defined in the Consumers Energy Business Energy Efficiency Programs Policies and Procedures manual.
  
- Tax Liability
  - Payees are solely responsible for all applicable federal, state and local taxes associated with the payout.
  
- Disclaimer
  - Consumers Energy reserves the right to modify the rules of the bonus for clarification purposes without materially affecting the rules of the Bonus. Consumers Energy reserves the right to cancel the bonus at any time without obligation or prior notice. By participating, each entrant agrees to be bound by these Official Rules and the decisions of Consumers Energy, which shall be final.
  
- Waiver
  - By participating, entrants agree that Consumers Energy and all of its respective officers, directors, employees, shareholders, representatives and agents shall have no liability and will be held harmless for any liability, loss, injury or death to entrant or any other person, including, without limitation, damage to personal or real property, due in whole or in part, directly or indirectly, by reason of the acceptance, possession, use or misuse of the Program.
  
- Inclusion
  - Only the commercial and industrial large business Incentive Application will be eligible for this bonus offer.
  
- Sponsor
  - Consumers Energy Company, One Energy Plaza, Jackson, Michigan 49201.

## QUALITY APPLICATION BONUS REVIEW FORM

**Trade Ally to complete:**

Project Number: CE-23-\_\_\_\_\_ CE Company Name:\_\_\_\_\_ Incentive Amount:\_\_\_\_\_

Trade Ally Company Name:\_\_\_\_\_ Contractor ID:\_\_\_\_\_

**Consumers Energy to complete:**

**PASS Pre-Review**

- Customer Info (phone, contact, email, TaxID#)
- Account Number and Address Verified
- Estimated Completion Date
- App Submitted by Designated Trade Ally
- Measure Worksheets Complete (see catalog)

**FAIL Notes**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**PASS Technical Review**

- Product Spec Sheets for Every Measure\*
- Quote (if applicable) Custom Only
- Existing Quantity (count & incentive) Totals +/- 10%
- No Duplicate Applications/Work Completed

**FAIL Notes**

6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_

**PASS Final Review by Admin**

- All Customer Signatures
- Account Number and Address Verified
- Total Project Cost
- Actual Project Completion Date
- App Submitted by Trade Ally
- Accurate W-9 for all Payees

**FAIL Notes**

10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_

**PASS Technical Review**

- Incentive over \$1,000
- Completed Application Received +/- 30 Days of Estimated Completion Date
- Product Spec Sheets for Every Measure\*
- Invoices
- Existing Quantity (count & incentive) Totals +/- 10%  
Quantity Equals Reserved and/or Installed Measures

**FAIL Notes**

16. \_\_\_\_\_
17. \_\_\_\_\_
18. \_\_\_\_\_
19. \_\_\_\_\_
20. \_\_\_\_\_

**IMPORTANT NOTES:**

\*Submit additional documentation per measure as required in the catalog.

No previous applications may be submitted for this project.

All applications, including online applications must include all the above to be eligible for the Quality Application Bonus.