



# INFORMATION SYSTEMS INCENTIVE APPLICATION FOR BUSINESSES

Incentives subject to change. Please visit [focusonenergy.com/incentives/business](http://focusonenergy.com/incentives/business) to ensure most current form.  New Construction  Existing Building

## SECTION 1: CUSTOMER LEGAL INFORMATION (as shown on your income tax return)

Company Legal Name		Tax Identification Number—complete only one (must be 9 digits) FEIN #: _____ - _____ - _____ OR SS #: _____ - _____ - _____			
Legal Mailing Address		City	State	ZIP Code	
Business Classification of Customer (Check ONE. Required for all businesses, including non-profits) <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor/Individual <input type="checkbox"/> LLC <input type="checkbox"/> Other: _____					Owner Name (Corporations Excluded)

## SECTION 2: PAYMENT INFORMATION

Make Incentive Check Payable to: <input type="checkbox"/> Company <input type="checkbox"/> Business Owner's Legal Name (Only if Sole Proprietor) <input type="checkbox"/> Trade Ally (complete Section 4)					
Mail check to: <input type="checkbox"/> Company Legal Address <input type="checkbox"/> Job Site Address <input type="checkbox"/> Alternate Address (complete below)				Attention to:	
Alternate Pay Address		City	State	ZIP Code	

## SECTION 3: JOB SITE INFORMATION (where equipment was installed or service performed)

Job Site Name		Project Contact Name			
Job Site Street Address (physical location)		Project Contact Email			
City	State <b>WI</b>	ZIP Code	Project Contact Telephone		
Electricity Provider at Job Site		Natural Gas Provider at Job Site		Project Installation/Service Date	
Select the building type that represents where equipment was installed or service was performed (check ONE): <input type="checkbox"/> Industrial (manufacturing, food processing, paper mill, etc.) <input type="checkbox"/> Commercial (retail office, bar/restaurant, lodging, healthcare, auto/truck sales & repair, etc.) <input type="checkbox"/> Schools & Government (public/private schools, government buildings, municipalities, etc.) <input type="checkbox"/> Agribusiness (farms, greenhouses, aquaculture, etc.)				Describe Building Use (Example: Food processing plant) _____ _____ _____	

## SECTION 4: TRADE ALLY INFORMATION (See Trade Ally information section on the Program Information and Requirements page)

Trade Ally Name		Tax Identification Number—complete only one if receiving payment (must be 9 digits) FEIN #: _____ - _____ - _____ OR SS #: _____ - _____ - _____			
Trade Ally Street Address		City	State	ZIP Code	
Trade Ally Contact Name		Contact Telephone		Contact Email	
Business Classification of Trade Ally (Check ONE): <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor/Individual <input type="checkbox"/> LLC <input type="checkbox"/> Other: _____					

## SECTION 5: CUSTOMER SIGNATURE (Read and Sign)

**Certification: The following certifications are required in order for this form to substitute for the IRS form W9**

Under penalties of perjury, I certify that:

1. The number shown on this form is the correct taxpayer identification number.
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest or dividends or (c) the IRS has notified me that I am no longer subject to backup withholding.
3. I am a U.S. citizen (includes a U.S. resident alien).

The undersigned agrees that the stated energy efficient measure(s) was (were) completed or installed at the job site address listed above as part of the Focus on Energy Program. I have read and agree to the Terms & Conditions within this application. To the best of my knowledge, the statements made on this application are complete, true, and correct, and I have submitted the appropriate supporting documentation to receive an incentive.  **Itemized Invoice Attached**

Customer Signature	Customer Name (Print)	Date
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**Return signed, completed form and ITEMIZED invoice within 45 days of installation (but no later than July 31, 2011) to:**

**Mail:** Focus on Energy, Business Programs Incentives, 431 Charmany Drive, Madison, WI 53719

**Email:** Applications and invoices can be scanned and emailed to [BPforms@focusonenergy.com](mailto:BPforms@focusonenergy.com)

**Fax:** 608.237.2147

**Questions:** Call 800.762.7077



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## GENERAL REQUIREMENTS

1. These incentives may be eligible for new construction projects provided the building owner is planning to move their existing IT equipment to the new facility.
2. If replacing existing equipment, the replaced equipment must be removed and recycled by a computer recycling facility. An invoice, report, or receipt must be provided from the recycling center demonstrating that your replaced equipment has been recycled. For replacement projects, incentives will only be paid on up to the number of units that have documented proof of recycling. This ensures that equipment is removed from your environment and energy efficiency is achieved.
3. Application must include invoice itemizing the product(s) and/or service(s) received.
4. Incentive is limited to 50% of project costs.

## SERVER VIRTUALIZATION (PILOT PROGRAM)

1. Call Focus on Energy at 800.762.7077 and ask to speak with the IT and Data Center Business Development Manager to confirm availability of funds and to receive a reservation code prior to project initiation and ordering equipment or issuing purchase orders. **Incentives are not available without a reservation code.**
2. This incentive is for x86 servers only that are virtualized onto a virtual host server.
3. A minimum of eight (8) x86 servers must be included in the server virtualization project to qualify for this prescriptive incentive.
4. Provide the model number and maximum power requirements for each server being virtualized and recycled.
5. Provide the model number and maximum power requirements for each virtual host server.

INCENTIVE CALCULATION	Reservation Code:	
	(A) Number of servers removed and recycled _____ X \$150 per server removed and recycled =	\$
	(B) Project cost \$ _____ X 50% =	\$
<b>SERVER VIRTUALIZATION INCENTIVE REQUESTED</b> (smaller of A or B above) =		<b>\$</b>

## THIN CLIENT CONVERSION (PILOT PROGRAM)

1. Call Focus on Energy at 800.762.7077 and ask to speak with the IT and Data Center Business Development Manager to confirm availability of funds and to receive a reservation code prior to project initiation and ordering equipment or issuing purchase orders. **Incentives are not available without a reservation code.**
2. This pilot program will be limited to 20 projects in 2011.
3. This incentive is for desktop computers that are being replaced by a thin client machine. Customers who already have a thin client server-based infrastructure in place do not qualify.
4. Provide the model number and maximum power requirements for each desktop computer that is being replaced by a thin client.
5. Provide the model number and maximum power requirements for each thin client and server being added to your network for this thin client conversion project.

INCENTIVE CALCULATION	Reservation Code:	
	(A) Number of PCs removed and recycled _____ X \$60 per PC removed and recycled =	\$
	(B) Project cost \$ _____ X 50% =	\$
<b>THIN CLIENT CONVERSION INCENTIVE REQUESTED</b> (smaller of A or B above) =		<b>\$</b>

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## PC NETWORK ENERGY MANAGEMENT

1. Incentive is for sophisticated IT environments that dynamically control many computers from one central location. Simply activating the energy saving settings on the computer operating system does not qualify.
2. Must implement power policies for the PCs and attached monitors in your network. Activating power policies for only monitors does not qualify.
3. Laptops, thin clients, and other network devices do not qualify. This incentive is for controlling PCs only.
4. Must report the number of PCs controlled using the energy management software. A sample log sheet can be found at [focusonenergy.com/spreadsheet](http://focusonenergy.com/spreadsheet).
5. The PC network energy management system must collect data over time and offer a system-wide energy savings reporting function. Must provide this report on a representative number of PCs to monitor and document the potential for energy savings within your facility. This representative number of PCs shall not be fewer than 10% of the total number to be controlled or 5% for installations expected to impact more than 1,000 PCs. Report must cover at least one full week (≥7 days) of system operation; longer period preferred.
6. Must certify that policies and procedures are in place to ensure that the installed software remains in place and continues to control the PCs on the network.
7. Focus on Energy reserves the right to review software server records to assess the ongoing effectiveness of the installation.

## INCENTIVE CALCULATION

(A) Number of PCs controlled _____ X \$6 per PC =	\$
(B) Project cost \$ _____ X 50% =	\$
<b>PC NETWORK ENERGY MANAGEMENT INCENTIVE REQUESTED</b> (smaller of A or B above) =	<b>\$</b>

## ENERGY EFFICIENT AIR CONDITIONING EQUIPMENT

For prescriptive incentives for energy efficient chillers, or split system air conditioners, refer to the Heating, Ventilation, and Cooling Systems for Businesses Incentive Application at [focusonenergy.com/incentives/business](http://focusonenergy.com/incentives/business).

## DIDN'T FIND WHAT YOU WERE LOOKING FOR?

Custom incentives may be available for other complex or significant information system projects. Incentives are based on estimated energy savings generated from custom energy analysis conducted or reviewed by Focus on Energy. Technologies to consider for custom incentives include:

- Custom cooling systems
- Server consolidation
- Printer consolidation
- Power distribution / uninterruptible power supply retrofits

Custom projects require approval prior to project initiation and ordering equipment or issuing purchase orders. See Custom Incentives section on the Program Information and Requirements page.

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## PROGRAM INFORMATION AND REQUIREMENTS

### INCENTIVES

Cash incentives are limited to \$250,000 per project and \$500,000 per customer in a calendar year for all Focus on Energy incentives (prescriptive and custom). Payments are usually made within 8-10 weeks from the date that all completed paperwork is received. Depending on your business tax classification, you may receive IRS Form 1099 for incentives totaling over \$600 in a calendar year.

### PRESCRIPTIVE INCENTIVES

Any project with an expected incentive exceeding \$25,000 must receive written approval BEFORE project initiation or equipment purchase. Check the Focus on Energy website at [focusonenergy.com/incentives/business](http://focusonenergy.com/incentives/business) or call 800.762.7077, then press #2 for more information.

### CUSTOM INCENTIVES

If your project does not fit the descriptions on this prescriptive incentive application form, it may qualify for a custom incentive which requires approval prior to project initiation and ordering equipment or issuing purchase orders. Direct inquiries to 800.762.7077, then press #2 for Business Programs, or visit [focusonenergy.com](http://focusonenergy.com).

### TERMS & CONDITIONS

- 1. Incentive Offer:** This application covers products installed/service performed between January 1, 2011 and June 30, 2011. Applications must be postmarked within 45 calendar days of project installation **but no later than July 31, 2011**, unless an earlier date is specified by a Focus on Energy promotion. Applications received beyond the 45 days or after July 31, 2011 will not be accepted. Please keep a copy for your records. Incomplete applications will be returned.
- 2. Proof of Purchase:** This application must have complete information and be submitted with an invoice itemizing the product(s) and/or service(s) received. Purchase orders, proposals and quotes are not considered proof of purchase. See the requirements section of this application for more details. Sample invoices are provided at [focusonenergy.com/sampleinvoice](http://focusonenergy.com/sampleinvoice).
- 3. Compliance:**
  - a. All projects are expected to comply with federal, state and local codes.
  - b. All equipment must be new. Used or rebuilt equipment is not eligible for incentives without pre-approval. Leased equipment must receive pre-approval BEFORE project initiation or entering into the equipment lease. Replaced equipment must be removed and not reused elsewhere.
  - c. Equipment must meet specification requirements and be purchased and operating prior to submitting an incentive application form.
  - d. The customer is required to maintain accurate records of the project work including but not limited to installation records, invoices and maintenance information for a period of two (2) years from the date the incentive was paid. Focus on Energy reserves the right to inspect such project records for a period of two (2) years from the date of the incentive being paid.
- 4. Payment:** Focus on Energy reserves the right to a full recovery of any incentive payments if Focus determines that the customer has misrepresented information on the project or is ineligible. Should the customer or its representative apply for and receive duplicate payment, Focus reserves the right to recover payments made in excess of the entitled incentive.
- 5. Publicity:** Focus on Energy reserves the right to publicize the customer's participation in this program, unless specifically request otherwise in writing. Requests should be emailed to [bpforms@focusonenergy.com](mailto:bpforms@focusonenergy.com). Customers or trade allies may not use the Focus on Energy name or logo in any marketing, advertising or promotional materials without prior written permission. When referencing Focus involvement with any project, customers shall collaborate with Focus marketing staff to prepare any press release and to plan for any news conference and agrees to provide Focus, for its prior written approval, a written copy of any advertisements or promotional material regarding this program prior to publishing any such advertisements or promotional material. Focus reserves the right to deny use of the Focus on Energy name and logo.
- 6. Program Discretion:** Incentives are available on a first-come, first-served basis. This offer is subject to change or termination without notice at the discretion of the Focus on Energy Program. Some Focus participating electric and/or natural gas providers have incentive programs outside of Focus on Energy. Customers of these providers might not qualify for incentives from both programs. These customers should check with their electric and/or natural gas provider to verify eligibility for dual incentives in order to comply with program rules.
- 7. Internal Labor:** Focus on Energy excludes internal labor (i.e. non-contracted labor) for private companies or individuals when calculating total project costs.
- 8. Disclaimers:** Focus on Energy, the program administrator, the State of Wisconsin, and participating utilities
  - a. do not endorse any particular trade ally, manufacturer, product, labor or system design by offering this program;
  - b. will not be responsible for any tax liability imposed on the customer as a result of the payment of incentives;
  - c. make no representation or warranty, and assume no liability with respect to the quality, safety, performance, or other aspect of any design, consulting, product, system, equipment, or appliance installed or received and expressly disclaim any such representations, warranties, and liability, including, but not limited to, any implied warranties of merchantability or fitness for a particular purpose. Please contact your trade ally for detailed manufacturer equipment warranties.
  - d. do not guarantee that installation and operation of energy-efficient equipment will result in reduced usage or in cost savings.
  - e. is not responsible for the proper disposal/recycling of any waste generated as a result of this project; and
  - f. is not liable for any damages, including any incidental or consequential damages, arising out of the operation or malfunction of the products, equipment, or appliances, or the installation thereof.
- 9. Monitoring and Verification:** Focus on Energy evaluates program efficacy by monitoring energy use/production prior to and after installation of your energy efficiency or renewable energy project. Program staff may conduct this monitoring or perform an inspection of the facility to survey the installed projects for a period of two (2) years from the date of the incentive being paid. Your signature on this application provides Focus on Energy approval to obtain energy data directly from your electric and/or natural gas provider(s). Any customer receiving an incentive may be contacted by an evaluator to verify service/equipment installation or be asked to complete a customer survey.
- 10. Indemnification:** Signatory(ies) and applicant(s) shall indemnify the Focus on Energy program, its administrator, the State of Wisconsin, and participating utilities, their respective affiliates, subsidiaries, parent companies, officers, directors, agents, and employees against all losses, damages, expenses, fees, costs and liability arising from any design, consulting, product, system, equipment, or appliance.
- 11. Utility Eligibility:** Customers who are served by a participating electric provider but not a participating natural gas provider will only qualify for incentives for electric technologies. Customers who are served by a participating natural gas provider but not a participating electric provider will only qualify for incentives for natural gas technologies. Customers who have both a qualifying electric provider and a qualifying natural gas provider will qualify for incentives on both electric and natural gas technologies. Customers who use propane or other non-qualifying fuels will not qualify for incentives for any gas technologies.
- 12. Misrepresentation:** Making false statements on any Focus on Energy incentive application is punishable by law. Any person who knowingly files an application containing any materially false information or who purposely and misleadingly conceals information commits a fraudulent act that subjects such person to criminal and civil penalties. Any and all funds determined to have been acquired on the basis of fraudulent information must be returned to the Focus on Energy program. This section shall not limit other remedies that may be available for the filing of false or fraudulent applications, including, but not limited to, referral to law enforcement authorities.

### TRADE ALLY INFORMATION

A trade ally is the company who provided/installed the equipment for your project or performed the service for which you are seeking an incentive. Program allies are trade allies who have signed an agreement with Focus on Energy which allows them to enjoy certain program benefits, one of which is to receive direct payment of incentives at your request. Incentives can only be paid directly to an ally if they have completed and submitted a Program Ally Application.

The FEIN and Business Classification of the program ally is required IF you received your incentive as a credit on your invoice, whereby the incentive is paid directly to the program ally. In this scenario, the credit must be clearly labeled as the Focus on Energy incentive and deducted from the amount due.

If your project was completed by more than one ally (example, equipment was purchased from one ally but installed by another ally) and the incentive is being paid to you the customer, please enter the information of the ally who installed your equipment in Section 4: Trade /Program Ally Information. If the equipment was self-installed, please enter the information of the ally from whom you purchased the equipment.

Focus on Energy works with eligible Wisconsin residents and businesses to install cost effective energy efficiency and renewable energy projects. Focus information, resources and financial incentives help to implement projects that otherwise would not get completed, or to complete projects sooner than scheduled. Its efforts help Wisconsin residents and businesses manage rising energy costs, promote in-state economic development, protect our environment and control the state's growing demand for electricity and natural gas.

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