

# 2025 Efficient Products



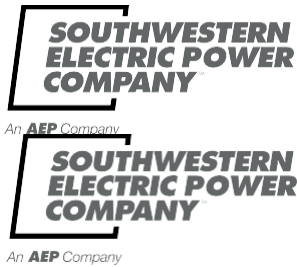
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# Efficient Products Pathway Manual

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## Section 1: Introduction

This pathway manual outlines the policies and procedures for Southwestern Electric Power Company's (SWEPCO's) Efficient Products Pathway (EPP). This manual will guide implementation and participation activities. The manual is designed for internal use by SWEPCO, the Pathway Staff and the Pathway Administrator. SWEPCO has contracted with CLEAResult Consulting, Inc. to serve as the Pathway Staff and Administrator. The manual will not be distributed to participating retailers. However, content in the manual will be used to guide the agreements and contracts executed with retailers.

### 1.1 Pathway Overview

SWEPCO's Home Solutions Program offers incentives for the quality installation of eligible products and services that improve the energy efficiency and comfort of SWEPCO residential customers in Arkansas. Incentives are also offered for qualifying used appliances that are recycled through CLEAResult's recycling program. These incentives are designed to reduce the initial costs associated with energy-efficient home improvements and encourage the removal of inefficient products through responsible recycling. This manual provides a roadmap for implementing efficient products and recycling incentives through the Efficient Products Pathway which is one of 4 residential Pathways within the broader SWEPCO Home Solutions Program.

Efficient product incentives are designed to increase the penetration of energy-efficient products in the market. In addition, SWEPCO will increase customer awareness for energy-efficient products through an integrated marketing campaign and education at the point-of-purchase. Through a mail-in incentive and an online portal, SWEPCO provides customers with incentives for qualifying clothes washers, electric clothes dryers, heat pump clothes dryers, induction cooktops, dehumidifiers, air purifiers, smart thermostats, heat pump water heaters, pool pumps, connected level 2 EV chargers, refrigerators and freezers, and advanced power strips (APS), purchased at partner or non-partner retailers. Incentive forms and recycling information are available at [SWEPCO.com/ARsaves](http://SWEPCO.com/ARsaves) and in-store. Customers may also submit forms through an online portal at [SWEPCO.force.com](http://SWEPCO.force.com). Proof of purchase and other requirements are verified prior to incentive fulfillment and payment.

One key consideration while implementing the efficient product incentives is to remain market neutral in terms of manufacturer and retailer partners. Though SWEPCO does promote partner retailers through various marketing strategies, customers may purchase their efficient products from any retailer if all pathway guidelines are met.

### 1.2 Pathway Goals



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Table 1 outlines the EPP goals and objectives for 2025. Overall goals for the pathway provide savings of 265 kW and 1,527,988 kWh. Actual energy and demand savings will be calculated using the Deemed Savings calculations section of the Technical Reference Manual (TRM) 9.2 as approved by the Arkansas Public Service Commission.

Table 1: Efficient Products Pathway Goals

Program Year	kWh Savings	kW Savings	Incentive Budget
2025	1,522,489	136	\$299,718

### 1.3 Roles and Responsibility

CLEARResult, as the pathway implementer, is responsible for developing and maintaining retailer and manufacturer relationships; tracking appliances sold, paying retailers, manufacturers, and/or customers for sold/purchased products, and verifying all data with a quality assurance/quality control (QA/QC) plan. Data and energy savings are calculated and tracked using Excel and DSMT, a cloud-based data platform.

### 1.4 Contract Information

SWEPCO	1-888-266-3130
C/O CLEARResult	Fax: 479-234-4972
P.O. Box 9567	info@SWEPCOsavings.com
Fayetteville, AR 72703	SWEPCO.com/ARsaves

Table 2: Program Contacts

Name	Company	Role/ Responsibility	Telephone	E-mail Address
Nancy Guisinger	SWEPCO	Residential Programs Coordinator	479-973-2403	nsguisinger@aep.com
Jacob Nielson	CLEARResult	Senior Program Manager	479-439-8627	jacob.nielson@clearesult.com
Elisha Patterson	CLEARResult	Associate Program Manager	479-282-0600	elisha.patterson@clearesult.com
Amanda Madraso	CLEARResult	Pathway Lead	479-316-4522	amanda.madraso@clearesult.com

## **Section 2: Eligibility**

### 2.1 Customer Eligibility

Pre-qualifying is not required for participation in the EPP. Online retail purchases will be verified, prior to processing the payment, to ensure the product is being purchased and shipped to a SWEPCO residential customer. Targeted participants include SWEPCO customers who wish to



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improve the energy efficiency of their home.

SWEPSCO residential customers in Arkansas who meet the following requirements are eligible to participate in the EPP:

- Incentives are available to any residential dwelling served by a SWEPSCO electric meter.
- Appliances purchased must be installed at the location associated with the SWEPSCO account number listed on the Appliance Incentive Form (See Appendix A).
- Households are limited to one appliance incentive per household. (Dehumidifiers, Clothes Washers, Electric Clothes Dryers, Heat Pump Clothes Dryers, Induction Cooktops, Heat Pump Water Heaters, Refrigerators and Freezers, Pool Pumps *and Connected EV Chargers*), and two per household for Air Purifiers, Smart Thermostats and Advanced Power Strips (APS).
- Items to be recycled must contain refrigerant and currently include refrigerators, freezers, and packaged HVAC units.

## 2.2 Measure Eligibility

The EPP offers incentives for advanced power strips (APS), ENERGY STAR qualified dehumidifiers, ENERGY STAR qualified air purifiers, ENERGY STAR qualified clothes washers, ENERGY STAR qualified electric clothes dryers, ENERGY STAR qualified heat pump clothes dryers, ENERGY STAR qualified induction cooktops, ENERGY STAR qualified heat pump water heaters, ENERGY STAR qualified pool pumps, ENERGY STAR qualified smart thermostats, ENERGY STAR qualified Refrigerators and Freezers, and ENERGY STAR Connected Level 2 EV Chargers. Factors that can influence measure eligibility include retailers, their store locations and manufacturer preferences, manufacturer selection, and the State of Arkansas' Deemed Savings, Installation and Efficiency Standards Technical Reference Manual (TRM 10.0). The following must be met to qualify for an incentive:

*Clothes Washers, Electric Clothes Dryers, Heat Pump Clothes Dryers, Induction Cooktops, Air Purifiers, Heat Pump Water Heaters, Smart Thermostats, Dehumidifiers, APS, Pool Pumps, Refrigerators and Freezers, and Connected Level 2 EV Chargers.*

- Customers may purchase the product from a partner or non-partner retailer.
- Incentive availability is first-come, first-serve.
- Clothes Washer, Electric Clothes Dryer, Heat Pump Clothes Dryer, Induction Cooktop, Heat Pump Water Heater, Dehumidifier, Pool Pump, Refrigerators and Freezers, and Connected Level 2 EV Charger incentives are limited to one (1) incentive per household.
- APS, Air Purifier, and Smart Thermostat incentives are limited to two (2) incentives per household
- The incentive fulfillment process for the efficient products is based on a standard incentive form application..
- Incentive application forms can be submitted through the mail or via the online portal within 90 days of purchase.
- Before an incentive is paid, the Pathway Staff will provide a complete review of all submitted documentation. See appendix A for an overview of the Quality Assurance Plan.

### *Appliance Recycling*

- Incentive availability is first-come, first-serve.
- Item must be safely accessible for removal from the residence by CLEAResult staff



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- Item must be in working condition.

### 2.3 Incentive Rates

For qualifying ENERGY STAR products, incentives will be paid to customers after the incentive form has been submitted to the pathway and proof of purchase requirements have been met. To qualify for an incentive, each measure must meet the minimum requirements as outlined in Section 2.2. The incentives for qualifying appliances are shown in Table 3.1.

Table 3.1: Appliance Incentive Amounts

Appliance Incentives	
Measure	Incentive/Unit
ENERGY STAR Clothes Washer	\$75
Advanced Power Strip (Tier 1 and Tier 2)	\$10 to \$25
ENERGY STAR Dehumidifier	\$25
ENERGY STAR Heat Pump Water Heater	\$1,150
ENERGY STAR Heat Pump Water Heater – Multi-Family	\$500
ENERGY STAR Smart Thermostat	\$75
ENERGY STAR Air Purifier	\$50
ENERGY STAR Pool Pumps	\$250
ENERGY STAR Refrigerators & Freezers	\$75
ENERGY STAR Connected EV Level 2 Charger	\$250
ENERGY STAR Electric Clothes Dryer	\$75
ENERGY STAR Heat Pump Clothes Dryer	\$200
ENERGY STAR Induction Cooktop	\$150

## Section 3: Participation Process

The participation process described below has been developed for SWEPCO residential customers interested in improving their home’s energy efficiency using the Efficient Products Pathway. See Appendix A for an illustration of the Participation Process

### Traditional Paper Method

Step 1: Customer purchases appliance at any retailer

Step 2: Customer completes paper EPP Incentive Form and sends through the mail, email or fax to the pathway implementer. Customer must include proof of purchase and required documentation.

Step 3: Pathway Staff validates documents and issues incentive check to customer on bi-weekly basis.

### Online Portal Method

Step 1: Customer purchases appliance at any retailer

Step 2: The customer logs on to SWEPCO.force.com and completes the online EPP incentive



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form, attaches a copy of the receipt and any other required documentation.

Step 3: Pathway Staff validates documents and issues incentive check to customer on bi-weekly basis.

## **Section 4: Quality Assurance, Quality Control**

### **4.1 Monitoring and Measuring**

Pathway Staff will review all submitted EPP incentive forms to verify customer eligibility and validate attached documents. A key objective of the QA/QC process is to ensure customer compliance with pathway requirements.

Before an incentive is paid for any efficient product purchase, Pathway Staff will provide a complete review of 100% of the submitted documentation. This data will be used to calculate final incentive payments to customers and report energy efficiency savings. The review will ensure that all required information is collected including signatures, dates, and project specific data. If information is missing, customers will be asked to provide the missing information or resubmit a corrected EPP incentive form. The following information is verified during this process:

- Complete customer contact information
- Complete home information
- Complete installed product information
- ENERGY STAR qualifications, if certified as ENERGY STAR product
- SWEPCO account number
- Receipt
- kW and kWh savings and incentive calculations

The Pathway Staff will track participants for dehumidifier, air purifier, smart thermostat, clothes washer, electric clothes dryer, heat pump clothes dryer, induction cooktop, connected level 2 EV charger, advanced power strip (APS), refrigerator and freezer, pool pump, and appliance recycling incentives. Each application is entered into DSMT to capture customer demographic information, and efficient product data. At this time, the account is validated, and EPP savings is calculated and recorded. Additional measurement and verification such as visual verification or follow-up phone surveys may be conducted. Deemed savings will be used to calculate energy savings per unit.

## **Section 5: Marketing**

Marketing for the EPP incentives may be conducted using the following tactics. See SWEPCO's Integrated Marketing Plan for more details.

### **5.1 Marketing Tactics**

- Store/shelf signage at partner retailers



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- Online via [SWEPCO.com/ARSaves](http://SWEPCO.com/ARSaves)
- Radio, print, and digital advertising
- Direct e-mail sent to SWEPCO residential customers
- Direct outreach to community groups and congregations

Many retailers accept and encourage in-store events such as radio remotes, DIY workshops, etc. The Pathway Staff will work with corporate and store managers to identify opportunities to cross-promote seasonal promotions, coordinate in-store events, and identify other marketing opportunities. See the Integrated Marketing Plan for more information on pathway marketing.

## **Section 6: Incentive Fulfillment Process**

### **6.1 Incentive Process**

The incentive fulfillment process for the efficient products is based on a standard incentive form application. Incentive application forms can be submitted through the mail or via the online portal. Incentives will be processed by Pathway staff on an ongoing basis. Incentive applications require specific documentation from the customer, including physical proof of purchase such as a store receipt with verifiable model and stock-keeping unit (SKU) information.

Mail-in forms will be available in-store and at [SWEPCO.com/ARSaves](http://SWEPCO.com/ARSaves). Customers must submit the completed form or apply online via the EPP online portal within 90 days of purchase to SWEPCO for incentive processing.



## Appendix A – Efficient Products Pathway Quality Assurance / Quality Control Plan

### QA/QC Protocol

CLEARResult’s Quality Management Process (QMP) includes both quality assurance (QA) and quality control (QC) components to ensure continuous pathway integrity. It is a holistic and preventative approach to quality assurance. QC inspections are used to verify quality of the results, and QA activities such as retailer and manufacturer qualification and training help to ensure quality issues do not appear downstream in the process. QMP prevents quality issues from coming up in the first place and improves the entire system, including for participating retailers.

Retailer training and outreach are key components of QA/QC for EPP. Sales associates serve as trusted subject-matter experts who can influence decision-making at the time of purchase. CLEARResult will:

- Conduct periodic sales associate trainings to educate staff on EPP.
- Work with retailers to secure in-store promotional events.
- Conduct periodic check-ins by phone and in person to assess EPP effectiveness, verify point of purchase signage and develop relationships with individual retailers.

Tracking products and reporting accomplishments will be completed through agreements reached with retailers, manufacturers and suppliers.

### Quality Assurance

Pathway Process Trainings (QA)	Pathway Staff will organize sales and pathway trainings for retail staff departments. Trainings will cover each measure running in their store and the latest in energy efficiency.
Application Review (QA)	Incentive applications will be reviewed for accuracy by the Pathway Staff and submitted for payment