



Assessment Subsidy / Rebate Assignment Update

For 2013 SMUD offers a fixed \$200 per assessment with **20% conversion rate** (contract written to perform work) required. The deadline for all assessment subsidy applications is **30 days** after the assessment is completed. There are three places where the customer is required to sign. The bottom line on the assessment application is to be signed the day that the customer receives the report. Contractors have been having the customer sign all lines when the test is completed which is not accurate, as the last line states that the customer have received their report. The 30 day window where assessment will be accepted begins on this date – when they received the report. These are calendar days. A copy of the assessment report, including fully filled out JRT tab, the CAZ tab, and **The Check box Worksheet** of rebates are to be supplied to both SMUD and the customer for payment. These hard copy reports are to be placed into the Metal drop box found in front of the SMUD Financing area, not the Security Desk. SMUD staff empty this box several times each day, and time stamp each document. Failure to submit documents within the 30 day window will cause the assessment to be void, and payment will not be made.

Rebate Assignment

Applications for the Home Performance rebates are being turned in incomplete and in error. A lot of these errors are in relation to the assignment of the rebate to the contractor. If the customer signs over the release of the rebate to the contractor, then the mailing address where the check is to be sent should be the address of the

contractor, not the customer. We are also seeing blank fields being left, and incorrect account numbers, payees, and addresses. BKI has been instructed to return incomplete or inaccurate applications to the contractor and hold up paying the customer until the corrections have been made. Therefore it is critical to review your submissions for accuracy, and watch for any notes through the VISION database to ensure expedited customer service and rebate processing.

Updated JRT

An updated JRT was posted to the SMUD contractor website on *January 8*. Please use this JRT for any new jobs going forward. (If you have already begun entering data on the December 17 version, you do not need to transfer to the January 8 version.) Major updates include a revised Terms and Conditions page on the SMUD Rebate Application and additional automated checks to confirm that the home qualifies for the upgrade measures selected on the Menu tab.

Important Links

Updated JRT: click [here](#)

Updated Contractor Handbook: click [here](#)

Contractor meeting video: click [here](#)

EFCA website: click [here](#)

Upcoming Event

Stay tuned for the upcoming
SMUD/Contractor meeting around mid
March

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