

Welcome to the Green Ontario Fund Online Orientation for the GreenON Rebates Program!

Before you begin please plan on 30 minutes of undisturbed time to complete the Orientation.

Use the Next and Back buttons to navigate through the screens. On question screens, you will need to select the correct answer to advance forward.

What is The Green Ontario Fund?

“ The Green Ontario Fund is a not-for-profit provincial agency that invests proceeds from Ontario’s carbon market into climate actions that help people and businesses reduce greenhouse gas emissions and use cleaner technology to power their homes and workplaces. ”



An agency of the Government of Ontario

How was the Green Ontario Fund formed?

2015

- **Ontario's Climate Change Strategy:** vision and path to a prosperous, low-carbon society where greenhouse gas (GHG) reduction is part of Ontario's growth, efficiency and productivity

2016

- **5-year Climate Change Action Plan:** part of the Strategy, committed to creating a new agency (to become Green Ontario Fund) to use a portion of proceeds from ON's cap and trade program to increase use of low-carbon technologies

2017

- **Green Ontario Fund:** mandated to stimulate development of industry, trades and business undertakings that further deployment of technology to reduce GHG emissions from buildings or from the production of goods

What does the Green Ontario Fund offer customers?

- **Program look-up tool:** Ontarians can find rebate programs offered by electricity/gas utilities and municipalities by typing in their postal code on this page: www.greenon.ca
- **GreenON programs:** Ontarians can access GreenON programs and services to reduce energy costs, improve occupant comfort and help fight climate change by reducing greenhouse gas emissions
 - The GreenON Rebates Program is just one of the programs offered by the Green Ontario Fund

What is the GreenON Rebates Program?

- Customers must use **Participating Contractors (you!)** to install qualifying insulation and air sealing, windows, and/or heat pumps
- Homeowners and landlords can participate
- Focused on existing detached, semi-detached, and row town houses
 - *New custom homes are eligible for the heat pump rebates only*
- The program is designed to encourage homeowners to invest in building envelope and HVAC upgrades

What is involved in GreenON Rebates Program ?

- Contractors who participate in the GreenON Rebates Program play an integral role in the success of the program
- To better understand the importance of your role and the program, this orientation walks through what is involved in being a participating contractor and offering rebates on eligible measures to your customers including:
 - Getting customers to participate
 - What rebates are offered
 - Meeting the program requirements
- You'll also learn how the Green Ontario Fund will monitor and evaluate your performance to ensure program compliance and customer satisfaction

What products are eligible for rebates?

- Rebates are available for the following:
 - Insulation—exterior wall, attic, basement
 - Air sealing rebate also available with insulation installation
 - Windows—ENERGY STAR® Most Efficient 2017 (additional criteria apply)
 - Heat pumps—ground source and air source
- Following this orientation Contractors must review orientation materials on the products, including eligible equipment specifications, associated rebate values, and project documentation requirements
- **Please ensure products and equipment meet the current program eligibility requirements before offering the rebates to customers**

Program benefits for you and the customer

- Program success depends on the expertise of Participating Contractors like you
- Benefits for you:
 - Listing on the program website's Participating Contractor look-up, so more qualified leads will contact you
 - Access to program rebates for your customers, so you can sell more energy-efficient products and equipment
- Benefits for homeowners:
 - Access rebates for upgrades to the home's building envelope and HVAC
 - Improve home comfort year-round
 - Save energy and help fight climate change

Sales tips

- Ask open-ended questions to better understand their needs and priorities
- Present three to five product features, advantages and benefits
- Appreciate your customers' concerns and allow them to explore objections
- Don't push a sale, but help your customers buy the right system for them
- Champion energy efficiency! Make the benefits of investing in energy efficiency part of each and every sales conversation.
- Use GreenON program materials, such as brochures available on greenoncontractorresources.ca

Participating Contractors are encouraged to promote the program

- Program marketing materials are available for download at www.greenon.ca and the contractor resources site: greenoncontractorresources.ca
 - Additional materials will become available
- Participating Contractors can reference that you are a “Participating Contractor in the GreenON Rebates Program offered by the Green Ontario Fund—an agency of the Government of Ontario”
- Participating Contractors can not use the Green Ontario Fund logo or any program logos in custom marketing materials

Participating Contractors are prohibited from using misleading and aggressive sales tactics

- Please ensure your marketing materials include accurate program information
- Your company and its representatives must not exert undue pressure on your customers or prospective customers
- Your company and its representatives must not make any statement that is false, misleading, or dishonest
- Any violations by the contractor related to the above will not be tolerated by the IESO or the Green Ontario Fund and may result in Contractors being removed from the program and excluded from future participation in Green Ontario Fund initiatives.

Ensure compliance to the terms and conditions

- Please review the Contractor Participation Agreement (CPA) on the Contractor Resource Site: greenoncontractorresources.ca
- The CPA together with the Qualifying GreenON Measures and Rules document outlines the rebate program's legal requirements, such as:
 - The credentials required to perform the service
 - The eligibility periods and claim submission deadlines
 - The supporting documents that need to be submitted with each application
- You are also required to provide your customers with a copy of the Consumer Terms and Conditions **before** they agree to purchase and install the equipment. The Consumer Terms and Conditions can be found as a .PDF file under the Incentive Requirements tab on the Contractor Resources Site
- We will communicate regularly with registered Participating Contractors about changes, new developments, etc., by email newsletter. To stay informed, please promptly read any email newsletters about the GreenON Rebates Program

How does the GreenON Rebates Program work?



Contractors register online and provide necessary documentation and complete required training and orientation

Participating contractor look-up is available by customer's postal

Windows, insulation and air sealing, and heat pumps

For homeowners and landlords, with existing houses; heat pumps eligible for new custom homes

Online or paper forms

Customer confirms accuracy of information provided by contractors and submits it with proof of purchase

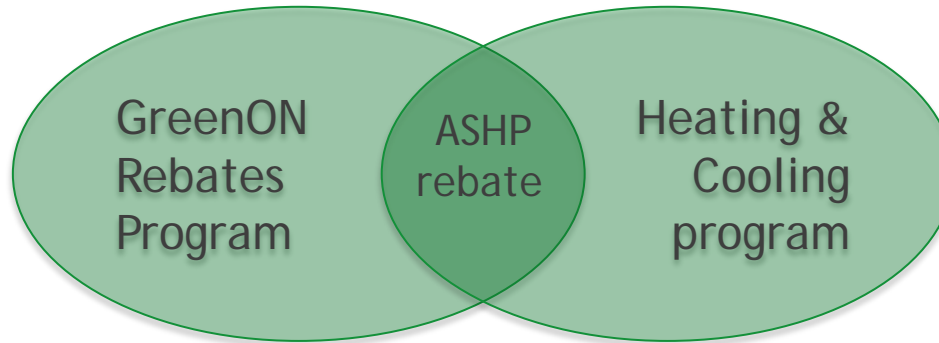
8-12 weeks

How does this program and Save on Energy Heating & Cooling program interact?

- GreenON Rebates Program and the Save on Energy Heating & Cooling program are complementary programs - contractors must sign a Participation Agreement for each program to be listed as a Participating Contractor
- Air Source Heat Pumps (ASHP) are an eligible measure in both programs
- Both programs have the same product eligibility and rebate values
 - Note that a project is not eligible for rebates from more than one program (no 'double-dipping')
 - Note that as of the launch of GreenON Rebates Program, homes with *any* existing fuel type (not just electrically-heated homes) are now eligible for a rebate for an ASHP and the rebate values have increased

How does this program and Save on Energy Heating & Cooling program interact? *continued*

- Heating and Cooling Incentive program information is available here: <https://saveonenergy.ca/Consumer/Programs/HVAC-Rebates.aspx>





Heating & Cooling Program

GreenON Rebates Program

Measure Incentives Available

Furnace with ECM

SEER 18 CAC

Circulator Pump

Air Source Heat Pumps for electrically heated

Smart thermostat for electrically heated

Insulation & Air Sealing

ENERGY STAR® 2017 Most Efficient Windows (additional U value criteria applies)

Air Source Heat Pumps for non-electrically heated

Ground Source Heat Pumps (system, unit and loop replacements)



Quiz

Before offering a rebate to a customer, Participating Contractors are responsible for ensuring the product is eligible for the GreenON Rebates Program?

- a) True
- b) False

Monitoring and evaluating Participating Contractors

- The program administrators conduct random surveys and in-home audits of consumers that participated in the GreenON Rebates Program
- The surveys measure consumer satisfaction with the program and the contractor that completed the work. Questions cover topics such as: the influence of the rebate on their purchase decision, the ease of obtaining the rebate, and their satisfaction with the contractor as related to the rebate.
- The in-home audits verify that the equipment meets the requirements and all incentive rules were adhered to.
- Contractor complaints submitted by customers are taken seriously by the Green Ontario Fund. Complaints are investigated and require the contractor to provide a resolution where necessary; please ensure you are complying with the terms of the Contractor Participation Agreement. **Instances of non-compliance may result in Contractors being removed from the program and excluded from future participation in Green Ontario Fund initiatives.**

To submit a rebate you will need the following:

- Receipts and before and after photos of all products installed (e.g. 6 photos for 3 new windows)
- Itemized invoices (Proof of Purchase) with per unit cost for the product and for the installation of the product
- **General home info:**
 - Customer Name (First and Last)
 - Customer Installation Address
 - Customer Billing Address (for provision of incentive cheque, if different from installation address)
 - Customer LDC Account Number
 - Does the home have a Central Air Conditioning System (CAC) -Y/N
 - Approximate square footage of the house
 - Approximate age of the house
 - Existing heating energy source (electricity/natural gas/propane/other)
 - Type of heating system (i.e. baseboards, forced air furnace, air source heat pump, ground source heat pump etc.)
 - Age of existing heating source
 - Type of cooling

Submitting a rebate for each measure installed

- In addition to the general information on the customer's home, each Qualifying GreenON Measure requires Contractors to collect and submit information on:
 - the existing equipment/materials and;
 - the new equipment/measure(s) installed
- Review the measure-specific Orientation materials required to complete your registration as a Participating Contractor for more information on the eligibility and application requirements for Air Source Heat Pumps, Ground Source Heat Pumps, Windows and Building Envelope measures (available on the Contractor Resource Site)
- Contractors must satisfy all registration requirements for each Qualifying GreenON Measure you are registering to install to have access to these measures in the online claim form

How to submit an application

- Log in to <https://heatingandcooling.dropzonecdm.com/Account/ContractorLogin>
- Complete the online claim form on behalf of the customer **BEFORE MARCH 31** for any installations occurring prior to that date, and email or print out a copy for the customer to review and approve
- The customer submits the application and the proof of purchase(s)

Accessing the Online Submission Form:

Access to submission site:

- Only participating contractors, who complete this Orientation, as well as the additional registration requirements, can access the online claims form. The form can then be accessed from the Participating Contractor Login website link, via the GreenON Rebates Program website.
- To access the form, fully registered users will then need the same Contractor ID # and User Name used for this Orientation, as well as your unique Password.

Quiz

What document(s) are Participating Contractors required to provide to every customer participating in the GreenON Rebates Program?

- a) The Consumer Terms and Conditions
- b) A copy of their invoice/ Proof of Purchase
- c) The Contractor Participant Agreement
- d) A & B
- e) All of the above

If your customers have questions

Green Ontario Fund call centre

1-888-728-8444

Available Mon to Sat, 8am-8pm

info@greenON.ca and info@ontarioVERT.ca

If you or your technicians have questions

GreenON Contractor Support
1-844-318-1773 (or 905-361-0164)
Available Mon to Fri, 9am-5pm
greenonrebates@hrai.ca
greenoncontractorresources.ca

Thank you for your participation!

You have successfully completed the first Orientation module for the GreenON Rebates Program.

You are now required to complete the next module(s) pertaining to the specific products you plan to install.