

Small and Midsize Business Partner Trade Ally Installation/Service Summary

Valid Jan. 1, 2026 - Dec. 31, 2026

Instructions for use

This form is intended to act as the application, customer invoice and payment release. If you prefer to generate an invoice, please make sure it aligns with this. If your costs are less than the rebate and are capped, please submit a standard partner trade ally rebate application.

Step 1: Submit pre-approval paperwork

Pre-approval is required for partner trade ally rebates greater than or equal to \$5,000. In addition to any requirements specific to your project, pre-approval submissions must include the following:

1. Installation/Service Summary (no signature needed)
2. Specification sheet(s)
3. Steam trap survey (for steam trap projects)
4. Pipe Insulation Page Partner TA Application (for pipe insulation projects)
5. A copy of a recent Peoples Gas or North Shore Gas utility bill or third-party supply bill. If you have any questions, please call **855-849-8928**.

Step 2: Install new equipment

New equipment must be installed and old equipment removed or disconnected. Only new products and services that meet the minimum energy efficiency specifications listed in this application are eligible for rebates. Rebates for partner trade ally measures may not exceed the total project cost.

Step 3: Submit final paperwork

Incomplete applications or missing information will cause delays in or denial of payment. Applications must be received within 30 days of installation.

1. Signed Installation/Service Summary
2. Final Submittal Box Checked
3. Specification sheet(s)
4. Steam trap survey (for steam trap projects)
5. Pipe Insulation Page Partner TA Application (for pipe insulation projects)
6. Submit photos of old steam traps.

Customer information

Business Name:				Contact Name:						
Phone:		Fax:		Email:						
Installation Address:				City:			State:		ZIP:	
Mailing Address:				City:			State:		ZIP:	
Is this a 24-hour facility?	☐ Yes	☐ No	Annual Hours of Operation:		Fuel Type for Space Heating:	☐ Natural Gas ☐ Electric				
Domestic Water Heat:	☐ Natural Gas ☐ Electric			Central Domestic Hot Water System:	☐ Yes ☐ No					
Natural Gas Utility:	☐ Peoples Gas ☐ North Shore Gas				Utility Account Number:					

Products installed or services offered

All Terms and Conditions, specifications and documentation requirements outlined on the Partner Trade Ally Rebate Application apply. Not available to customers using more than 400,000 therms annually. The following energy-efficient products or services have been completed:

Products	Incentive paid to trade ally	Total # installed or size of boilers	Subtotal incentive paid to trade ally	Cost of services	Total cost to customer (minus incentive)	Customer initial for final approval
Programmable Thermostats	\$100 each					
Thermostat Reprogram	\$25 each					
Space Heating Boiler Tune-Up	\$0.40/MBH	___ boilers @ ___ MBH				
Process Boiler Tune-Up	\$0.60/MBH	___ boilers @ ___ MBH				
Steam Trap Survey	\$25 per steam trap					
Steam Traps (High Pressure)	\$325 each					
Steam Traps (Dry Cleaner)	\$175 each					
Steam Traps (Space Heating)	\$150 each					
Pipe Insulation (Submit applicable page on Partner Trade Ally Application)	Varies based on size					
Total:						

Installing contractor information

Partner Trade Allies may offer installations or services of qualifying energy-efficient products to eligible Peoples Gas or North Shore Gas Small and Midsize Business customers.

Partner Trade Ally Name:		Phone:				
Mailing Address:			Email:			
Technician's Name:		Date:		Time:		

☐ Installing contractor verifies that all work is complete and costs above are accurately stated. Check this box for Final Submittal.

Customer verification

As the owner or authorized representative of this property and as a Peoples Gas or North Shore Gas customer. I verify that the products/services listed above were completed at the described property. I understand that in return for these products and the services offered above, I agree to release and discharge Peoples Gas, North Shore Gas and Franklin Energy Services, LLC from any and all claims or damages whatsoever caused by such products installed at or in the premises in connection with the Peoples Gas or North Shore Gas Energy Efficiency Program. I authorize the Peoples Gas or North Shore Gas Energy Efficiency Program to verify the actual savings from the installation by reviewing three years of pre-installation billing and two years of post-installation billing and usage data. I agree to the release by Peoples Gas or North Shore Gas of any customer data, including personally identifiable information, to any contractor or other vendor providing services or support under the program.

Final Customer Signature:		Date:	
Print Name:		Title:	