



2024 SPRING PROGRAM GUIDELINES



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2024 SPRING CONSUMER PROMOTION

2024 Spring Program Dates

Sales Period: MARCH 4 - MAY 31, 2024

Last day of claiming: JUNE 28, 2024

Infinity® with Greenspeed Intelligence System

AC or HP	+	Furnace or Fan Coil	+	Infinity System Control	=	Rebate
24VNA6 25VNA4	+	59MN7 FE	+	SYSTXCCITC01 SYSTXCCWIC01	=	\$1,700

Infinity with Greenspeed Intelligence System + DGAPA + Infinity Zoning Panel + 2 Smart Sensors for Infinity Zoning Systems + Performance Large Bypass Humidifier = **\$2,100 REBATE**

AC or HP	+	Furnace or Fan Coil	+	Infinity System Control	=	Rebate
24VNA6 25VNA4	+	59TN6 59CU5 58CU5 58CU0 58TN0 58TN1	+	SYSTXCCITC01 SYSTXCCWIC01	=	\$1,400

Infinity® System

AC or HP	+	Furnace or Fan Coil	+	Infinity System Control	=	Rebate
24VNA9 25VNA8	+	59MN7 59TN6 59CU5 58CU5 58CU0 58TN0 58TN1 FE	+	SYSTXCCITC01 SYSTXCCWIC01	=	\$1,400

INTRODUCING

InteliSense™

T E C H N O L O G Y

THE SMART WAY TO SERVICE



InteliSense™ technology provides game-changing innovation and best-in-class digital tools to help you improve business efficiency and create stronger customer relationships. Use these tools and you'll have the smartest techs in the business:

- **Connected Portal:** Improved user experience and fault code history mean accurate troubleshooting so you can have the right parts on the truck before you go to the site.
- **Service Tech app:** Improved functionality and performance all the way around: expanded fault code history, access to technical specs, replacement parts, on-site equipment connectivity and more.

Performance® with InteliSense System

AC or HP	+	Furnace or Fan Coil	+	Ecobee powered by Carrier with InteliSense Control	=	Rebate
24TPB7 25TPB7	+	58SP0B 58SP1B 58TP0B 58TP1B 59SP6B 59TP6C FT4B	+	EB-STATE6ICR EB-STATE3LTICR	=	\$300



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Performance® System

AC or HP	+	Furnace or Fan Coil	+	ecobee powered by Carrier Control	=	Rebate
24TPA7 24SPA6 25TPA7 25SPA5	+	59TP6 59SP6 58SP0 58TP0 58TP1 58SP1 FV FT	+	EB-STATE6CR EB-STATELTCR	=	\$300



Performance System

+



Performance Carbon Air Purifier with UV

= \$400 REBATE



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Home Air Quality

Product Type	Model Number	Rebate
Infinity Air Purifier	DGAPA	\$200
Infinity Return Air Purifier	RGAP	\$200
Performance Carbon Air Purifier with UV	UVCAP	\$100
Ventilator	ERV, HRV	\$75
Dehumidifier	DEHXX	\$50
Humidifier	HUM	\$50
Ultraviolet Lamp	UVLCC	\$50
Carbon Monoxide Detector	COALM	\$25



Controls & Thermostats

Product Type	Model Number	Rebate
Infinity Control	SYSTXCCITC01 SYSTXCCWIC01	\$150
Infinity Zoning Panel	SYSTXCC4ZC01	\$100
Smart Sensor for Infinity Zoning Systems	SYSTXZNSMS01	\$25
Zoning	ZONECC	\$75
ecobee powered by Carrier	EB-STATE6CR EB-STATE6ICR	\$50
ecobee powered by Carrier	EB-STATE3LTCR EB-STATE3LTICR	\$25





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Ductless Units

Product Type	Model Number	Rebate
Infinity® Outdoor	38MPR	\$325
Infinity® Indoor	40MPH	\$75
Performance® Outdoor	38MAR 38MGR 38MGH 38MBR	\$250
Performance® Indoor	40MBC 40MCC 40MBD 40MBD 40MBF 40MAH 40MBA	\$50
Toshiba Carrier Outdoor	RAVAT2	\$250
Toshiba Carrier Indoor	RAVKR RAVUT RAVCT RAVBT	\$50
Midea Indoor	DHMP DHMA	\$50



Crossover Systems

Product Type	+	Furnace or Fan Coil or Air Handler	=	Rebate
38MAR	+	59TP6 58TP FV 40MBA	=	\$350
38MBR		40MBA		
38MUR		40MUA		
38MUR		59TP 58TP FV		





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VRF Units

Outdoor Unit	Rebate
38VMR* 38VMH* 38VMB* MCY* MMY*	\$1,400



Geothermal Heat Units

Product Type	Model Number	Rebate
Infinity®	GC GZ	\$1,200
Performance®	GP GW	\$800



Note: Listed rebates are for the Geothermal unit only

SPP Units

Product Type	Model Number	Rebate
Performance®	48VG 50VG 48VR 50VR	\$600





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Units Rebates

Product Type	Type	Model Number	Rebate
Infinity®	AC	24VNA9	\$275
	Heat Pump	25VNA8	\$275
	Furnace	59MN7 59TN6 59CU5 58CU0 58TN0 58TN1	\$225
	Fan Coil	FE	\$225
Performance®	AC	24TPA7 24SPA6	\$100
	Heat Pump	25TPA7 25SPA5	\$100
	Furnace	59TP6 59SP6 58SP0 58TP0 58TP1 58SP1	\$75
	Fan Coil	FT FV FZ	\$75
Performance® with IntelliSense	AC	24TPB7	\$100
	Heat Pump	25TPB7	\$100
	Furnace	59SP6B 59TP6C 58SP0B 58SP1B 58TP0B 58TP1B	\$75
	Fan Coil	FT4B	\$75



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2024 SPRING PROGRAM DATES

Sales Period: MARCH 4 - MAY 31, 2024

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Promotion terms subject to (1) product availability and (2) change or cancellation without prior notice. No substitutions will be accepted. Contact your distributor or program admin if you have questions.

PROMOTION OBJECTIVE

Carrier's Cool Cash promotion is designed to promote sales of Carrier systems in the residential add-on and replacement market. Carrier aims to offer a competitive consumer rebate program to stimulate off-peak sales and to help drive sales mix to Infinity® Series Equipment.

IMPORTANT INFORMATION – SPRING 2024

Revisions and updates to the Cool Cash Promotion are noted below, in addition to key reminders. All rebates will be instant rebates to the homeowner. An instant rebate means the dealer subtracts the rebate amount directly from the homeowner's invoice at the time of purchase. Gift cards will no longer be offered nor available. For qualifying sales, FADs can offer the FAD financing promotion and the Cool Cash product rebates to homeowners during the promotional period, but they can only claim for ONE reimbursement from the factory/distributor. The dealer is responsible for funding the other reimbursement 100%.

PROGRAM RULES

TERMS AND DEFINITIONS

Equipment Names – Carrier equipment models are referred to by series: Infinity® Series or Performance™ Series or Comfort™ Series.

MyHVACpin – MyHVACpin number is a four- or five-digit identification number that uniquely identifies a person - in this case, the Sales Associate. In order to submit a claim and a Sales Associate to receive sales credit, each Sales Associate must have his or her own MyHVACpin number. When a person becomes a registered user of HVACpartners.com (meaning they have their own user name and password), they also are assigned a unique personal identification number, referred to as MyHVACpin number. Sales Associates must enter this number on the claim /invoice documentation, so it can be entered while filing their rebate claim at www.CarrierIncentives.com. Otherwise, the sales associate will not receive credit for the sale.

Sales Associates can learn their MyHVACpin number in one of the following ways:

- Log onto HVACpartners.com, click on My Profile, and scroll to the field labeled MyHVACpin
- Contact the distributor's HVACpartners' Administrator
- Call Carrier Expert Central at 1-800-946-2930

Important: The HVACpartners ID number is not the same as the MyHVACpin number:

- HVACpartners ID – identifies a company/dealer location
- MyHVACpin number – identifies a person - in this case, the Sales Associate

www.CarrierIncentives.com – Website location for customer rebates and dealer incentives to be claimed.

KEY DATES

Sales Period: MARCH 4 - MAY 31, 2024

Last day of claiming: JUNE 28, 2024

Only Carrier systems or units purchased from participating dealers during the sales period and installed by the end of the installation period are eligible for the Cool Cash promotions. These promotions are not retroactive for homeowners who purchased qualifying equipment prior to the program start date. Carrier systems or units purchased after the sales period do not qualify for Carrier's Cool Cash promotions. Promotion terms subject to (1) product availability and (2) change or cancellation without prior notice. No substitutions will be accepted.



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KEY CONTACTS FOR PROMOTIONAL SUPPORT

Dealer Resources

- General questions about Cool Cash: Carrier Expert Central at 1-800-946-2930
- Claim submission process & information: www.CarrierIncentives.com
- Cool Cash inquiries or other Carrier program questions: Carrier Distributor/Territory Manager

Distributor Resources

- General questions about Cool Cash: Carrier Expert Central at 1-800-946-2930
- Claim submission process & information: www.CarrierIncentives.com
- Carrier Regional Sales Manager

Homeowner Resources

- General pre-sale inquiries: Carrier dealer or Carrier Consumer Relations at 1-800-CARRIER
- Claim submission process & information: www.CarrierIncentives.com
- Rebate claim & processing questions, or other rebate claim-specific inquiries: Cool Cash Claim Center at 1-800-236-4603

Homeowner Eligibility

Homeowners in the U.S. and Canada are eligible for the Carrier Cool Cash promotions. Only Carrier systems sold as a replacement for the homeowner's existing system or as an add-on to an existing home qualify.

THE FOLLOWING ARE NOT ELIGIBLE FOR THE PROMOTIONS:

- Commercial or institutional applications
- Residential new construction applications or upgrades
- Multi-family applications
- Investors/investment properties

QUALIFYING PRODUCTS

Please refer to the current program documentation for eligible products. Promotion terms subject to (1) product availability and (2) change or cancellation without prior notice.

UNIT SALE: DEFINITION

A rebate incentive exists for non-system unit sales. Reference the latest program documents for product eligibility for unit sale reimbursements. Specifically, the row and column labeled "Unit Only" illustrates the rebate for an indoor unit but no outdoor unit or an outdoor unit but no indoor unit. No matching outdoor or indoor unit is required to qualify for the unit rebate.

SYSTEM SALE: DEFINITION

To qualify for a system sale, the homeowner must purchase a Carrier indoor unit (furnace or fan coil) and Carrier outdoor unit (air conditioner or heat pump) plus a Carrier-branded thermostat as shown in these guidelines. The Carrier indoor and outdoor units must be included in the latest program documents. No substitutions will be accepted.

MULTIPLE SYSTEM REBATES

Homeowners are eligible to receive multiple system rebates for multiple purchases of full systems. However, multiple rebates require the completion of multiple rebate claim forms, one system rebate per claim form. The homeowner/dealer should file the claims on www.CarrierIncentives.com. For example, if a homeowner purchases two Infinity® full systems, comprising an indoor unit (furnace or fan coil), and outdoor unit (air conditioner or heat pump) and the Carrier-branded thermostat, the dealer must complete two (2) separate rebate claim forms.

REBATE CLAIM FORM

Neither the Carrier Cool Cash 3-ply product rebate claim form nor the e-form are required for Cool Cash claims.



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PROMOTION DEADLINES

Accounting guidelines and regulations will not permit claim exceptions to be funded from the factory beyond the published deadline. Missed deadlines due to rebate claim system errors will be addressed on a case-by-case basis.

Payment for a claim submitted beyond the published deadline is the responsibility of the distributor and dealer and at their discretion for reimbursement. In this event, Carrier will not be responsible or liable to share in the cost of the homeowner rebate.

ADJUSTMENTS TO A FILED CLAIM

In the event a filed and accepted claim from the current promotion needs to be adjusted, please note and follow these important dates and stipulations:

- Current promotion reimbursements may be adjusted up to 7 days prior to the end of the applicable promotion period. Adjustments may only account for increases in the rebate value due to errors or additions in the initial processing. Contact Cool Cash Claim Center at 1-800-236-4603 for more information.
- **Rebates from previous Cool Cash promotions will not be re-issued.**

INSTANT REBATE CLAIMING

ALL CLAIMS IN 2024 WILL BE INSTANT CLAIMS. NO GIFT CARDS WILL BE ISSUED.

INSTANT REBATE PROCESS (REQUIRES DEALER CLAIMING):

- 1) Make a Cool Cash qualifying sale and install the equipment per the promotion's deadlines.
- 2) Subtract the total rebate amount (from the Cool Cash rebate document) from the homeowner's invoice.
 - a. Give the homeowner the dealer invoice showing where the applicable Cool Cash rebate amount has been taken off of the price. The amount must be labeled "CARRIER COOL CASH INSTANT REBATE" clearly beside the rebate in order for Carrier to verify the correct amount was given.
- 3) Go online to www.CarrierIncentives.com and login using your HVACpartners ID and password to file the instant rebate claim by the promotion's deadline. Contact Cool Cash Claim Center at 1-800-236-4603 for questions.
- 4) Fax a copy of the invoice to the Cool Cash administrator at 1-877-553-9436 or upload it on www.CarrierIncentives.com.
 - a. The invoice must include the homeowner's name and address, and model number and serial number of each product purchased. Incomplete invoice information will be rejected and may result in delays or non-payment of the credit.
 - b. Administrators will match the invoice with the online claim, verifying all the information.
 - c. Carrier will fund the factory portion of the rebate weekly to the distributor.
 - d. The distributor will fund the distributor portion, plus the factory portion, back to the dealer.

INSTANT REBATE AUTHORIZATION

When a dealer submits an instant rebate claim on www.CarrierIncentives.com, they are electronically agreeing to adhere to the terms and conditions and follow the instant rebate process outlined in these guidelines. Once a claim is submitted dealer sales associates are confirming they understand the process required to file an instant rebate claim. If the dealership does not follow these procedures, the dealership owner understands the rebate claim will be rejected and the dealership will have to fund the entire cost of the rebate.



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INSTANT REBATE COMPLAINTS

Should a customer be concerned they did not receive the full amount of the instant rebate, the customer care center will open a case and follow the outlined process:

- 1) Collect invoice and claim information submitted to the rebate center by the dealer
- 2) Request invoice from the homeowner
- 3) If, after reviewing the invoice submitted to the rebate center and the homeowner invoice, the provided rebate is not clearly labeled as its own line item as “CARRIER COOL CASH INSTANT REBATE”, or the rebate amounts do not match, the customer service center will contact the dealer for clarification within 3 business days of opening the case.
 - a. Dealer has 10 business days from the initial call to work with the customer service center and come to a resolution where the homeowner was provided the full rebate owed based on the products purchased.
- 4) If there is no resolution within 10 business days of the first call made to the dealer by the customer care center, and Carrier has provided the homeowner with a check, the original Instant Rebate Claim submitted by the dealer will be reversed and Carrier will not pay the factory contribution portion of the claim.
 - a. It is the distributor’s discretion how they would like to proceed with the distributor contribution portion of the original claim.

COST

The cost of the homeowner rebate is shared by the dealer, distributor, and Carrier. Any deviation from the above is in violation of the program rules.

- Carrier and distributor each underwrite ¼ or 25% of the cost of the standard rebate; dealers are responsible for ½ or 50% of the cost of the rebate. While dealers provide 100% of the rebate up front, at the point of sale, 50% of that rebate total would be reimbursed after the claim is submitted and approved.
- Distributors are billed for ¾ or 75% of the cost of the rebate, which also includes all administrative fees.
- Distributors may not charge dealers for more than ½ of the cost of the rebate.
- Before enrolling dealers in the program, distributors must tell dealers they are responsible for paying ½ of the cost of the rebate.
- Carrier will invoice the distributor on a weekly basis throughout the duration of the program for all homeowner related rebates that were paid the prior week.

Illegal Activity: *Dealers and distributors may not charge the homeowner for any portion of the rebate, as this activity is considered fraud and is illegal.*

REBATE ACTIVITY REPORTS

Dealers and distributors can access the reports feature at www.CarrierIncentives.com to view rebate activity reports. Report updates are provided on a nightly basis indicating the previous day’s activity. This data is subject to website availability and may change any time during the promotion due to adjustment requests, product returns, etc. The first update will happen one week after the start of the promotion and the reports will display individual homeowner information by dealer. If the reports are accessed before this date, the screen will appear blank.

PROGRAM MATERIALS

Separate claim forms are no longer required. Dealers must apply for the Instant Rebate via the claiming site.

CARRIER FINANCING REIMBURSEMENT PROMOTION

FADs should refer to the Carrier Factory Authorized Dealer EcoHome Financing Promotion – Dealer Promotion Guidelines and reimbursement documents for details of the financing promotions available to them during the Cool Cash promotion and throughout the year. All dealers must file for financing claim reimbursement on the same website that product rebate claims are filed, www.CarrierIncentives.com.



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REBATES & FINANCING ON THE SAME SALE

Carrier dealers may still offer financing on the same sale that a rebate is provided to the dealer. In these cases, dealers must choose which of the two reimbursements they want to claim for. Dealers may not claim for more than one qualifying reimbursement per sale. The dealer is responsible for fully-funding (100%) whichever option they choose to not claim for.

CO-OP FUNDS

Co-op dollars from the “end-user media communications” portion of marketing funds may be used to advertise and promote Cool Cash.

DEALER PROGRAM ENROLLMENT

FAD dealers and past participants in Cool Cash will be automatically enrolled in Cool Cash. If a dealer is not automatically enrolled in Cool Cash by virtue of past participation or FAD status, the dealer must request enrollment from its distributor. In turn, the distributor will use HVACpartners.com to enroll the dealer in the promotion. Only registered dealers are eligible to participate in the Cool Cash promotions.

Distributors must enroll dealers in the Cool Cash program before the end of the Sales Period outlined in the Key Dates section of the guidelines.

Distributors may un-enroll a dealer from further participating in the program. If the dealer attempts to claim a rebate after the dealer un-enrollment date became effective, the Cool Cash Claim Center will reject the rebate claim. Dealers will still be financially responsible for any rebates that may have been issued before the un-enrollment became effective.

DISCLAIMERS

This document contains confidential, proprietary or trade secret information of Carrier Corporation. It may not be disclosed to any third party without prior written consent from Carrier Corporation.

Amendments, Modifications, or Exceptions

This promotion is subject to termination at any time, upon notice by Carrier. Carrier reserves the right to amend or modify any portion of the promotion at any time with reasonable communication. All amendments are effective when published by Carrier. Any exceptions to the program guidelines must be approved in writing by the promotion manager or authorized Carrier personnel.

Claims Auditing

All reimbursements under the program are subject to audit. If reimbursement is received on any claim that is later determined to be ineligible, the Distributor's/Dealer's account will be debited in the amount of the ineligible claim. It is the Distributor's/Dealer's responsibility to maintain copies of supporting documentation and claim reimbursement paperwork for a minimum of 12 months after reimbursement.