



ADDISON HVAC EXTENDED SERVICE AGREEMENT (ESA) PROGRAM



Administered by Trinity Warranty Solutions



Welcome to the Addison HVAC Extended Service Agreement Program!

The Addison HVAC Extended Service Agreement (ESA) Program was designed to help protect your customers by providing coverage for their commercial equipment after the original factory warranty expires. The ESA provides labor and/or parts coverage, and can be purchased up to 6 months from installation date. Coverage is based on the type of equipment and desired coverage term. You can choose from 2 labor reimbursement rates - \$125/hr or \$150/hr. Coverage also includes a 1 hour trip/diagnostic allowance at the chosen labor rate, to cover your cost to travel and/or diagnose the repair. Enclosed is a reimbursement schedule, listing the various types of repairs. We also include a parts process allowance (PA), to cover the cost of handling parts both in- and out-of-warranty.

Benefits for you:

- Profit from the sale of Extended Service Agreements
- Improved customer satisfaction
- Customer retention for future revenue
- No pre-authorizations required
- Simple and easy reimbursement for claims
- Gain a competitive edge by incorporating Extended Service Agreements into your product offering
- Trinity works with multiple "A"-rated insurance companies, which provides our customers an extra layer of protection and financial security

Benefits for your Customer

- Two of your customer's most valuable resources are time and money - your customer can now rest assured that their commercial HVAC equipment will be covered under an Extended Service Agreement
- This program protects your customer from the worries of "down time" and the cost of unexpected repair bills
- Your customer is buying tomorrow's repair costs at today's prices with a one-time payment
- No deductibles for your customer

How to Sell the Extended Service Agreement (ESA)

There are several ways to sell ESAs to your customer both successfully and profitably. Here are a few suggestions:

1. Offer the ESA at the point of every sale for new equipment.
2. Wrap the cost of the ESA within the equipment cost and use it as a selling feature of the equipment.
3. Sell the ESA as an add-on, like an accessory.
4. Use an ESA as a 'Good/Better/Best' selling aid with the type of equipment that you are selling.

When you offer a customer an ESA, 65% of the time they will say yes!

Enrollment Process

Please complete the enrollment form in this program guide.

Order Process

Following are the steps to place an order.

1. Review the pricing included in this program guide to determine the coverage you need. If you need coverage not included on the price page, please complete the Addison Quote Request Form, and forward it to quotes@trinitywarranty.com.
2. Complete the Addison Order Form found in this program guide, and send it to Trinity at orders@trinitywarranty.com.
3. Once Trinity completes processing your order, you will receive an agreement listing you as the servicer of record. It will outline the equipment, coverage and the effective start and end dates. You will be able to forward it to the equipment owner. Terms and Conditions may have slight variations by state.

ADDISON DEALER SIGN-UP FORM

Addison Dealer

PLEASE PRINT OR TYPE

Business Name:		Date:
Address:		
City:	State:	Zip Code:
Primary Contact:		Phone Number:
Fax Number:	Cell Number:	
Email Address:	Website:	

The parties agree that upon execution of the Dealer Sign-Up Form (“Dealer Agreement”) by Trinity Warranty (“Trinity”), Dealer shall be authorized to offer the Trinity Extended Service Agreement (“ESA”) for sale to its customers subject to the following conditions:

- | | |
|--|--|
| <ol style="list-style-type: none"> 1. Dealer shall submit order with End User information (name, address, and equipment information) to Distributor for processing. 2. Dealer shall notify each holder of an ESA that the ESA is not valid until the ESA is paid for in full by the Dealer. 3. When the ESA has been processed and is returned to the Dealer, it is the responsibility of the Dealer to verify the accuracy of the information on the ESA. If there is a discrepancy, the Dealer is to notify Trinity immediately. Failure to notify Trinity may negate coverage in the future. 4. Dealer agrees to verify coverage (including but not limited to coverage dates and covered equipment) on the ESA prior to initiating any repairs. 5. Claims submitted to Trinity by the Dealer shall represent services actually performed by the Dealer on the equipment listed on the Trinity ESA. 6. Dealer shall have the right to refuse any service calls. | <ol style="list-style-type: none"> 7. There is no overtime or holiday rate. There is only one (1) person per job allowed. 8. Dealer shall guarantee labor for 90 days on all repairs performed within the terms of the ESA. 9. Any use of the Trinity Warranty name in any sales or marketing program (including but not limited to direct mailing, brochures, or advertisements) must first have written approval from Trinity. 10. Any ESA sold by the Dealer to an End User remains your customer to service as long as the Dealer remains in business or in the event that Trinity discovers fraud or misrepresentations on the part of the Dealer. 11. In the event that Trinity discovers fraud or misrepresentation on the part of the Dealer, Trinity shall promptly notify the Dealer of its evidence and findings. Upon notice, Trinity may take such actions as reasonable and necessary including, but not limited to, requiring the Dealer to immediately terminate offering the Trinity Warranty, conduct an accounting review of the Dealer’s records, or terminate this Dealer Agreement. |
|--|--|

Any written modification to the information listed above shall not be effective or accepted without prior written consent of Trinity Warranty.

To complete your enrollment, please include the following with your completed information:

- W-9 Form
- Update Certificate of Insurance listing Trinity Warranty as a certificate holder.
- Certificate of Insurance showing General Liability (state minimum is required) and Workers’ Compensation

Your completed form may be submitted via email: enroll@trinitywarranty.com or fax: 312-445-8726.

I have read and accept the above conditions that apply to this form.

Signature:	Date:
Printed Name:	Title:



ADDISON-HVAC ESA ORDER FORM

Sales Representative Name:		Custom Quote #:	
Contractor Name:		Contractor Account	No:
Equipment Owner:		Purchase Order No:	
Equipment Address:		Phone Number:	
City:	State:	Zip Code:	
Date Installed <i>(Required for Processing)</i> :		Agreement Charge <i>(Amount paid by consumer and only required in some states.)</i>	

Equipment Type	Brand
Model No.	
Serial No.	
Size	Order Code
Equipment Type	Brand
Model No.	
Serial No.	
Size	Order Code
Equipment Type	Brand
Model No.	
Serial No.	
Size	Order Code

Equipment Type	Brand
Model No.	
Serial No.	
Size	Order Code
Equipment Type	Brand
Model No.	
Serial No.	
Size	Order Code
Equipment Type	Brand
Model No.	
Serial No.	
Size	Order Code

Please complete this form and submit it to orders@trinitywarranty.com.

TRINITY WARRANTY • PO Box 5640, Villa Park, IL 60181 • [T] 877-302-5072 • [F] 312-445-8726

System Type / Repair Condenser / Heat Pump/Package Unit	Reimbursement Hours Allowed
Accumulator / Receiver	3.0
Capacitor- Run / start / split (start assist)	1.5
Condenser Coil Replacement 1-5 Ton	5.0
Condenser Coil Replacement 6-25 Ton	6.0
Condenser Coil Replacement 26-50 Ton	8.0
Condenser Coil Replacement >50 Ton	10.0
Contactors 1-5 Ton	1.5
Contactors 6-10 Ton	2.5
Crank Case Heater	1.5
Control Board	2.0
Defrost Relay	1.5
Sensor	1.5
Compressor & Drier 1 – 5 ton	5.0
Compressor & Drier 6 – 10 ton	6.0
Compressor & Drier 11 – 15 ton	7.0
Compressor & Drier 16 - 25 tons	8.0
Compressor & Drier 26 - 35 tons	9.0
Compressor & Drier 36 - 50 tons	10.0
Compressor & Drier 51 - 80 tons	12.0
Fan Blade	1.5
Leak / Restriction	2.5
Schrader core	1.0
Leak in Coil	3.0
Low or Hi Pressure Switch	3.0
Motor & Capacitor .25 HP - 1 HP	2.0
Motor & Capacitor 1.5 HP - 5 HP	3.0
Motor & Capacitor 1/4 HP - 1 HP	4.0
Motor & Capacitor 1/4 HP - 1 HP	5.0
Overload – external of compressor	1.5
Reversing Valve	3.0
Reversing Valve Coil	1.5
Service Valve – Replacement	3.0
Time Delay Relay (when part of the original equipment)	1.5
High voltage wire repair (low voltage not covered)	1.0
Leak in Factory piping, Joints or Valves (1 leak per term of the agreement)	3.0
Recovery Time 1-5 Tons (Only if Repair requires opening the Sealed System)	1.0
Recovery Time 6-15 Tons (Only if Repair requires opening the Sealed System)	2.0
Recovery Time >15 Tons (Only if Repair requires opening the Sealed System)	3.0

System Type / Repair Indoor Coil	Reimbursement Hours Allowed
Drain Pan	3.0
Expansion Valve	3.5
Leak in Coil	3.5
Leak in Factory piping, Joints or Valves (1 leak per term of the agreement)	3.0
Liquid Line Solenoid Valve	2.5
Metering Device / Check Valve	3.0
Evaporator Coil Replacement 1-5 ton	5.0
Evaporator Coil Replacement 6-25 ton	6.0
Evaporator Coil Replacement 26-50 ton	8.0
Evaporator Coil Replacement >50 ton	10.0
System Type / Repair Furnace - Oil / Gas or Air Handler	Reimbursement Hours Allowed
All Fuel Control	1.5
Bearing Assembly (1 set) or shaft	2.5
Blower Motor / Inducer Motor and/or wheel	2.0
Blower Motor bracket / mount	2.0
Burners 1 – 3 pieces	1.5
Burners 4 – 6 pieces	2.0
Cad Cell	1.5
Couplers	2.0
Door Switch	1.5
Fan & Limit Control – 4 or more wires	2.0
Fan / main control or ignition module	1.5
Fan Center (complete)	2.0
Fan, Sequencer, or other relay	1.5
Flame Sensor	1.5
Fuel Pump – oil system	1.5
Gas Valve 1-5 Ton	2.0
Gas Valve 6-10 Ton	3.0
Gas Valve >10 Ton	4.0
Heat Exchanger - Primary and/or Secondary	6.0
Heating Element Assembly	2.0
Igniter–hot surface or spark ignition (electrode) sealed/non-sealed combustion	2.0
Inducer / Combustion Assembly	1.5
Main, Auxiliary, or Spill (roll out) Limits 2 - wire	1.5
Misc. Internal Wiring	1.5
Pressure Switch	1.5
Selector Switch	1.5
Thermocouple or Thermal Fuse	1.5
Thermostat (if installed at time of System Installation)	1.0
Transformer	1.5

Multiple and Companion Repairs

Multiple Repairs

When you have multiple repairs in one service call, the highest cost repair is applied first at 100% of the labor allowance, the second repair is at 75% of the labor allowance, and any additional repairs on the same ticket are 50% of the labor allowance.

Companion Repairs

Companion repairs are claims submitted as multiple repairs when they should be considered one (1) repair. We refer to these as companion repairs, as they are in fact part of the same failure. The examples below are considered to be one (1) repair for claim purposes.

Primary Repair	Companion Repair	
Compressor	Capacitor	Contactors
	Drier	King or Service Valves
	Reversing Valve	Hard Start Kit
Motor Replacement	Capacitor	Fan Blade
	Blower Wheel	Contactors
	Relay	Bracket
Evaporator Coil	TXV	Drier
	Drain Pan	
Condenser Coil	Drier	

Please note:

Companion Repairs will pay 1 Labor charge and 1 parts allowance but they will still pay for multiple parts.
 Example: A condenser fan motor and a capacitor = 1 labor charge, 2 parts and 1 parts allowance for the motor.

Our coverage is inclusive of the manufacturer’s warranty. All exclusions in the manufacturer’s warranty apply to the extended warranty. Coverage is limited to the equipment itself. It does not include components that are external to the unit, such as field piping, drain lines, electrical disconnects, etc. Coverage does not include nuisance calls or normal maintenance. See the specifics concerning exclusions listed in the terms and conditions.

Claim Procedure

You have 60 days from the failure date to submit a claim.

Please include the following paperwork:

- Trinity Warranty Claim Form (included in this program guide)
- Please have the ESA number, and model and serial numbers of the failed equipment.
- Original Service Ticket with Customer Signature
- Receipts for all parts over \$75 (regardless if the part is in- or out-of-OEM warranty)

Please Note:

Invoice or proof of cost is required for parts over \$75

****Pictures are required for leak and wire repairs****

We will pay for your cost of refrigerant up to \$15.00 per pound only for leaks and burnouts. You must submit an invoice for refrigerant with the claim. There is no Process Allowance (PA) for refrigerant.

Please submit claims to Trinity Warranty via:

Email: claims@trinitywarranty.com

Fax: 312-445-8726

Trinity will adjudicate the claim and send a check to you within 30 days of completed paperwork.

Addison HVAC Program Process Allowance

The Commercial Refrigeration Process Allowance (PA) (considered a parts markup) is tiered:

<u>Dealer Cost of Part:</u>	<u>PA:</u>
\$1 - <\$50	\$15
\$50 - <\$150	\$35
\$150 - <\$250	\$50
\$250+	\$75

Transfer of Agreement

The agreement is transferable for only \$30.00. The new equipment owner can simply fill out the enclosed form with a check and submit it to Trinity Warranty. Service calls are not covered unless the transfer paperwork has been initiated and processed within 90 days of the actual transfer.

Cancellation

You may cancel this Plan at any time.

If this Plan is canceled before the 31st day after the purchase date:

1. You will be refunded the full purchase price of the Plan, decreased by the amount of any claims paid under the Plan; and no cancellation fee will be imposed.

If this Plan is canceled on or after the 31st day of the purchase date:

1. You will be refunded the prorated purchase price of the Plan based on the time remaining (calculated in months) less a decrease by the amount of any services or claims that have been provided or paid under this Extended Service Plan. A cancellation fee will be imposed in the amount of \$50.

ESA Changes

If you need to correct information on an ESA, such as name or address misspellings, or if there is an equipment change-out, please complete the enclosed ESA Updates Form, and submit the form to updates@trinitywarranty.com. If equipment is replaced, we require a service ticket or work order signed by the customer.

All changes to the coverage itself require the ESA to be voided and reordered:

- Your customer wants to change coverage - such as 1 year coverage to 3 year coverage
- You ordered coverage for the wrong equipment type, such as a Low Profile Evaporator instead of a Medium Profile Evaporator

Important Trinity Warranty Numbers & Emails

Following are important phone numbers and emails.

Customer Service for enrollments, orders, claims, general questions and information:	877-302-5072
After Hours:	877-302-5072, and press the following numbers: 3 for Claims 4 for Billing, Orders & Enrollments
Fax:	312-445-8726
Enrollments Email:	enroll@trinitywarranty.com
Orders Email:	orders@trinitywarranty.com
Billing Email:	billing@trinitywarranty.com
Claims Email:	claims@trinitywarranty.com
ESA Changes/Cancellations:	updates@trinitywarranty.com

REQUEST FOR TRANSFER FORM

Your Trinity Extended Service Agreement may be transferred to a new owner for a fee of \$30. Please complete this form and submit it with your payment to Trinity Warranty within ninety (90) days of ownership change. Checks should be made payable to Trinity Warranty. You will receive a transfer acknowledgement within thirty (30) days of your request. For questions, contact our Customer Service Department at 877-302-5072.

I hereby request Trinity Extended Service Agreement (ESA) Number _____ be transferred

FROM:

Name _____

TO:

Name _____

Address _____

City _____ State _____ Zip Code _____

Requested By _____

Date _____

Dealer Name _____

Dealer Account # _____

TRINITY OFFICE USE ONLY

Authorized By _____

Effective Date of Plan _____

Effective Date of Transfer _____

Date Received Transfer Fee _____



Trinity Warranty Solutions, PO Box 5640, Villa Park, IL 60181
[T] 877-302-50712 | [F] 312-445-8726 [W] www.trinitywarranty.com



TRINITY WARRANTY ESA UPDATES / CANCELLATION FORM

FOR UPDATES:

Please provide the ESA number, the name of the homeowner/equipment owner, the reason for the change, and the incorrect/correct information. You only need to complete the fields that need to be corrected.
For all equipment changeouts, please include the service ticket or work order documenting the changeout. Updates will not be made without the proper paperwork.

SEND THIS FORM AND OTHER DOCUMENTATION TO updates@trinitywarranty.com FOR PROCESSING. PLEASE ALLOW 4 WEEKS TO RECEIVE UPDATED PAPERWORK.

****This form cannot be used for any change to an order code or coverage. For all order code or coverage changes, see the process below. You will need to cancel the ESA and place a new order for equipment coverage.***

FOR CANCELLATIONS:

You may cancel this Agreement at any time. If this Agreement is canceled before the 31st day after the purchase date:

You will be refunded the full purchase price of the Agreement, decreased by the amount of any claims paid under the Agreement, and no cancellation fee will be imposed.

If this Agreement is canceled on or after the 31st day of the purchase date:

You will be refunded the prorated purchase price of the Agreement based on the time remaining (calculated in months) less a decrease by the amount of any services or claims that have been provided or paid under the Agreement. A cancellation fee will be imposed in the amount of \$50.

Please complete this form electronically and email it to updates@trinitywarranty.com.

*******ESA UPDATES*******

ESA Number:		Homeowner/Equipment Owner Name:							
Reason for Change (Required): (entry error, equipment changeout, etc.)									
Consumer Details:		Incorrect Information	Correct Information	Consumer Details:		Incorrect Information	Correct Information		
Name:				Phone Number:					
Address:				Installation Date:					
Equipment Type 1: (furnace, AHU, etc.)	Equipment Info:	Incorrect Information	Correct Information	Equipment Type 2: (furnace, AHU, etc.)	Equipment Info:	Incorrect Information	Correct Information		
	Model Number:				Model Number:				
	Serial Number:				Serial Number:				
	Manufacturer/Brand:				Manufacturer/Brand:				
Equipment Type 3: (furnace, AHU, etc.)	Equipment Info:	Incorrect Information	Correct Information	Equipment Type 4: (furnace, AHU, etc.)	Equipment Info:	Incorrect Information	Correct Information		
	Model Number:				Model Number:				
	Serial Number:				Serial Number:				
	Manufacturer/Brand:				Manufacturer/Brand:				

*******ESA CANCELLATIONS*******

ESA Number(s):		Homeowner/Equipment Owner Name:							
Reason for Change: (customer didn't want, accidentally ordered, etc.)									
Dealer Name:									