



Turn to the experts

High-Efficiency Gas Furnace Trade-In Allowance Program

May 1, 2023 – April 30, 2024

Please note that this program is only available to homeowners whose failed secondary heat exchanger is covered by the enhanced secondary heat exchanger warranty for the following models installed within the past 20 years: 58 series MCA, MCB, MEC, MSA, MTA, MTB, MVB, MVC, MVP, MXA, MXB, UVB, and the Payne® brand condensing gas furnace models 490A, PG9M and PG9UAA. Other eligibility requirements and restrictions apply. Please carefully review the official program rules that follow.

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What's New for 2023-2024

Effective October 1, 2022, Carrier no longer issues pre-paid cards to the consumer. All Furnace Trade-In allowances should be provided to the homeowner as an instant rebate off invoice.

Program Description

The Carrier High-Efficiency Gas Furnace Trade-In Allowance Program is designed to offer homeowners an alternative to replacing only the heat exchanger under the terms of their limited lifetime heat exchanger warranty on a first-generation Carrier condensing furnace, if their furnace experiences a secondary heat exchanger failure.

Dealers apply online for the trade-in allowance on behalf of the consumer. In order to do this, they will need the consumer contact information including a valid email address.

The Carrier High-Efficiency Gas Furnace Trade-In Allowance Program will allow you to offer homeowners an opportunity to upgrade to a new Carrier furnace at significant savings. This presents an opportunity for increased customer satisfaction while you generate new income on the job (rather than merely performing warranty work). Carrier furnaces eligible for these trade-in allowances are covered by an enhanced warranty on the secondary heat exchanger (see Service Managers' Bulletin SMB09-0024). By only replacing the secondary heat exchanger, however, a homeowner's secondary heat exchanger will be new but the rest of their furnace will still be old. To the customer, it would be like spending their money to put a new engine in a car with 200,000 miles on it. The engine may be new, but the car still has an old transmission, frame and other parts, which would make further breakdowns or repairs still likely. Instead, you can offer them an allowance of up to \$900 toward the cost of replacing the old furnace with a new Carrier high-efficiency model. Customers benefit from getting a new furnace with a new warranty. Back to that car analogy, it's like getting a brand new car—engine, transmission and all.

How the Program Works

The process for consumer trade-in allowance claims and remuneration issuance is similar to our Cool Cash Promotion. The allowance should be offered as an instant rebate by the dealer.

There are three avenues a consumer may use when faced with a failed secondary heat exchanger from this series of products—

Install Date	Option	Avenue	Result
All within 20 years of install date	Replace the secondary heat exchanger	1993 – Week 18, 2008 follow SMB09-0024; Week 19, 2008 – Week 51, 2011 Standard Warranty processed through Service Bench	Dealer replaces the secondary at no cost to homeowner and receives up to four hours of labor and all associated parts necessary to replace the secondary ¹
	Receive funds to apply to a new gas furnace	1993 – Week 18, 2008 follow SMB09-0024; Week 19, 2008 – Week 51, 2011 Standard Warranty processed through Service Bench	Consumer may receive a \$200 parts allowance plus four hours of labor ¹
	Trade-In Allowance	Gas Furnace Trade-In Allowance Program through www.carrierincentives.com	Consumer receives up to \$900 when purchasing a qualifying replacement gas furnace. Rebate paid via instant rebate office invoice.

¹ See standard warranty documents for complete details.

- 1) When a customer's secondary heat exchanger fails and qualifies for warranty repair, you now can offer them three choices:
- a) Repair – You fix the existing condensing gas furnace at no charge to the consumer. This is in accordance with SMB09-0024 for products manufactured between 1993 and week 18, 2008 and the standard warranty for products manufactured between week 19, 2008 and week 51, 2011.
 - b) Replace – You offer the homeowner the equivalent of four hours labor plus a \$200 parts allowance to replace their furnace. This is in accordance with SMB09-0024 for products manufactured between 1993 and week 18, 2008 and the standard warranty for products manufactured between week 19, 2008 and week 51, 2011.
 - c) Replace – The customer trades in the old furnace for a new, qualifying Carrier model and gets up to a \$900 trade-in allowance from the factory as an instant rebate. This is the Trade-In Allowance Program and gets processed through www.carrierincentives.com.
- 2) If they opt for the trade-in allowance by purchasing from you a 59TP6, 59TN6 or 59MN7 gas furnace, you'll complete the change-out, complete the Audit Form and attach the *Audit Form* to the unit and make them available to the distributor, then ...
- a) Gather the necessary customer information (including email address) and go online to the trade-in program web site (www.carrierincentives.com) to file their claim for the trade-in allowance; **you must include the old model and serial number as well as the new equipment model and serial number**;
 - b) The trade-in rebate should be offered to the consumer as an instant rebate at time of equipment sale.
 - c) Be sure to then register the new equipment through the Product Registration on www.carrier.com to secure the 10-year parts and lifetime heat exchanger warranty on the new furnace where applicable;
 - d) Except for using the *Audit Form*, there is no need to follow SMB09-0024 nor is it necessary to use Service Bench to provide warranty information.

Eligibility Dates/Deadlines

May 1, 2023.....	Trade-In Allowance program begins
April 30, 2024	Trade-In Allowance program ends (last day for Dealer to make a sale under the terms of this program)
May 15, 2024	Dealer must complete installation by this date
May 15, 2024	Last day to enter a trade-in allowance claim*

***Claims must be submitted by 6:00 pm Eastern Standard Time**

Eligible Installations and Products

- Only homeowners in the U.S. are eligible.
- The existing secondary heat exchanger must qualify for warranty repair under the terms of the enhanced secondary heat exchanger warranty.
- The trade-in allowance may be offered only on Carrier® furnace models 58 series MCA, MCB, MEC, MSA, MTA, MTB, MVB, MVC, MVP, MXA, MXB, UVB, and the Payne® brand condensing gas furnace models 490A, PG9M and PG9UAA.
- Regarding program deadlines, only qualifying Carrier gas furnaces purchased from participating dealers between May 1, 2023 and April 30, 2024 and installed by May 15, 2024 are eligible.
- Carrier furnaces purchased after April 30, 2024 do not qualify for the 2023-2024 High-Efficiency Gas Furnace Trade-In Allowance Program.
- If a furnace is purchased during the program period but has not been installed by May 15, 2024, the consumer is not eligible for the trade-in allowance.
- If a qualifying furnace is replaced by the installation deadline, but the dealer fails to submit the claim form by 6:00 pm Eastern Standard Time, May 15, 2024, the consumer will not be eligible for the trade-in allowance.
- Only the Infinity® Series and Performance™ Series condensing gas furnaces listed above qualify for a trade-in allowance:

Qualifying Products w/Trade-In Allowances

<u>Eligible existing furnace changed out for a new:</u>	<u>Allowance:</u>
Performance Series™ 59TP6	US \$700
Infinity System® 59TN6	US \$800
Infinity System® 59MN7	US \$900

Consumers are eligible to receive multiple unit trade-in allowances for multiple purchases of the same product, in the unlikely event that a given home has two qualifying gas furnaces that have both experienced secondary heat exchanger failures. However, multiple unit trade-in allowances require the completion of multiple Trade-In Allowance Program Claim Forms. Only one unit trade-in allowance per Claim Form is allowed. For example, if a consumer purchases two 59MN7 gas furnaces, the dealer must complete two Trade-In Allowance Program Claim Forms. Trade-In Allowance Program Claim Form #1 has a maximum trade-in allowance of \$900. Likewise, Trade-In Allowance Program Claim Form #2 has a maximum trade-in allowance of \$900. Combined, the total trade-in allowance is \$1,800 (\$900 + \$900). The combined trade-in allowance for both units should be applied as an instant rebate off invoice.

Participation Process

- 1) On a service call, determine if the furnace has experienced a failed secondary heat exchanger, and, if so, that the homeowner qualifies for the enhanced secondary heat exchanger warranty.
- 2) Offer to repair the secondary heat exchanger at no cost to the consumer per the warranty and process through Service Bench.
- 3) Offer to provide \$200 plus the cost of four hours labor toward a replacement gas furnace and process this through Service Bench.
- 4) Offer the trade-in allowance as an alternative to replacing the failed heat exchanger under the enhanced secondary heat exchanger warranty. This is processed through the www.carrierincentives.com website.
 - a. If the consumer purchases a new furnace eligible for the trade-in allowance, complete the change-out of the furnace then access the online rebate form at www.carrierincentives.com to provide all of the requested information. Then be sure to register the product(s) on www.carrier.com.
- 5) **Important:** follow the procedures outlined in the SMB09-0024 for furnace disposition and audit.

Dealer Responsibilities

- ***Illegal Activity: You may not charge the consumer for any portion of the Trade-In Allowance program (except for the new furnace and labor to install it as outlined above).***
- Carrier or your Distributor may remove a dealer from further participation in the program for any reason, including suspected fraudulent, illegal or unauthorized use of the program.
- You should notify your distributor if you decide not to participate in the program.
- Whether at your request or your distributor's or Carrier's discretion, if you are removed from the program at any time, your company will be solely liable for repayment to Carrier and your distributor for any trade-in allowances that may have been issued to your customers before your company's removal became effective.
- If the consumer attempts to claim a trade-in allowance for a product sold after the dealer un-enrollment date became effective, Carrier will reject the Trade-In Allowance Program claim.
- In the event a consumer requests a trade-in allowance after May 15, 2024, the consumer will be referred back to you. At that point, you assume full responsibility for paying the full amount of the trade-in allowance

Consumer Claims

- Consumers are limited to one trade-in allowance per Claim Form and one trade-in allowance per eligible furnace.
- Trade-in allowances will be applied as an instant rebate off invoice by the dealer.
- A thank you note from Carrier will be mailed to the homeowner.

Consumer FAQs

What does “installation date” mean? How is it defined? The installation date is the date that the installation of the new Carrier furnace is completed and your new furnace is operational.

Why do I have to wait until the product is installed to claim my trade-in allowance? By waiting until the product is installed to claim your trade-in allowance, you are assured that the work has been completed to your satisfaction.

I just moved or I am moving from the home where the installation was completed. Can I still get the trade-in allowance? Yes, provided you have complied with all other provisions of the enhanced secondary heat exchanger warranty covering the furnace with the failed secondary heat exchanger.

I don’t live at the same place where the furnace was installed (second home). Will that be a problem? Not if all other eligibility requirements are met. The trade-in allowance will be applied to the equipment purchase as an instant rebate.

Is my purchase eligible for financing as well? Your purchase may be eligible for financing. To find out, check with your Carrier dealer.

Is my purchase eligible Carrier Cool Cash rebates as well? Your purchase is eligible for Cool Cash if the purchase and installation falls within the program dates identified in the Cool Cash program. To find out, check with your Carrier dealer.

What if the trade-in allowance is less (or more) than what the dealer told me it would be? The rebate amounts for Carrier High-Efficiency Gas Furnaces are:

<u>Model Number</u>	<u>Rebate</u>
59TP6	\$700*
59TN6	\$800*
59MN7	\$900*

* Customer will receive the greater of this amount or the amount they are otherwise entitled to under the enhanced secondary heat exchanger warranty.

Is my personal information safe/private? Your personal information will not be shared with anyone other than your Carrier dealer, distributor and Carrier Corporation. For more information, see Carrier’s Privacy Policy, available on the web at www.carrier.com.

Dealer FAQs

What promotional activities will be in place to support this Trade-In Allowance Program? This program is not designed to be an active consumer promotion, as consumers and products are only eligible in the event of a secondary heat exchanger failure on the qualifying models. Carrier will not advertise this trade-in program. Further, you may not advertise this program. It should be offered only when you encounter a failed secondary heat exchanger that is eligible for warranty repair. At that time, you may use the consumer brochure we’ve provided to explain the opportunity to the eligible consumer. No co-op dollars may be used to advertise or promote this Trade-In Allowance Program.

Program Support/Resources

Customer Service: Carrier's High Efficiency Gas Furnace Trade-In Allowance Program is designed to provide superior customer satisfaction. To assure our success we have provided support lines for the various constituents:

Consumers:

- Pre-sale questions: contact their Carrier dealer
- Post-sale questions: contact Carrier Consumer Relations at 1-800-CARRIER
- Trade-In Allowance claiming questions: contact their dealer

Dealers:

- Program information: contact your Carrier distributor or Carrier Expert Central at (800) 946-2930
- General bulletins and information regarding the Trade-In Allowance Program are also posted to www.HVACpartners.com

	Phone 800.946.2930
	Fax 800.844.2042
	E-mail expertcentral@carrier.com
	US Mail P.O. Box 4726 Syracuse, NY 13221-4726

Program Activity Reports

Distributors and dealers can view activity reports online at www.carrierincentives.com. Report updates are provided on a weekly basis to show the latest activity. This data is subject to change, however, any time during the program period due to errors in reporting the claim, adjustment requests and product returns.

To determine claim status: Refer to the code that is shown in the Trade-In Allowance Program Status field:

- **BI PROCESS:** Payment request accepted; awaiting authorization to proceed
- **BI SENT:** Payment request approved claim and record has been sent to vendor for reimbursement

To view reports

- Log on to www.carrierincentives.com
- Click the **Reports** link
- Click the **Claim Activity Report** link
- Select the *Gas Furnace Trade-In* promotion and a *date range* for the report
- Click the **Generate Report** button

Additional Reference Information

MyHVACpin

This four- or five-digit number is used by HVACpartners to uniquely identify a person. When a person becomes a registered user of HVACpartners (that is, they have their own username and password), they are also assigned a unique Personal Identification Number, referred to as MyHVACpin.

Retail sales associates can learn the MyHVACpin number assigned to them by one of the following:

- Log onto HVACpartners, click on My Profile, and scroll to the field labeled MyHVACpin
- Contact their distributor's HVACpartners' user administrator (who can look up the retail sales associate's profile listed in HVACpartners)
- Call the channel support center, Carrier Expert Central, at (800) 946-2930

Important Note:

The *HVACpartners ID* number is not the same as the *MyHVACpin* number, as explained below:

- *HVACpartners ID* – is a four- or five-digit identification number that uniquely identifies a company
- *MyHVACpin* – is a four- or five-digit identification number that uniquely identifies a person; in this case, the retail salesperson.