



# Sales and Service Guidelines

Carrier Enterprise  
Distributor Program

USA



## Welcome

SelecRate has been developed to make your business more profitable and less complicated. You and your customer receive all of the benefits of a comprehensive plan that offers fixed-cost solutions for future mechanical breakdowns. You can select from four options depending upon the reimbursement schedule that best fits your business model.

Benefits include:

- Simple SelecRate reimbursement for no-hassle claims
- Profits on the initial sale
- Customer retention for future revenue
- Improved customer satisfaction
- Immediate approval allowing you to start today

Service Net, part of American International Group, Inc. (AIG), is a service management company that delivers a full range of industry-leading service solutions including warranty management administration, extended service programs, customer service support, service network management, claims processing services, and service contract underwriting.

As North America's largest provider of risk management programs for the HVAC/R industry, we are excited to provide you this unique user-friendly opportunity to take your business to the next level. The SelecRate plan significantly increases the value of your business. You will build your customer base and your service department. This allows you to raise valuable customer retention rates and grow your profits.

Key Features of the Warranty Division of AIG:

- U.S. based Customer Care Center
- Over 26 years of experience
- Presently servicing over 75 million active contracts
- Other clients include: Apple, Amazon, Best Buy, The Home Depot, Toshiba, Sharp & LG

Please take a moment to complete the Dealer Enrollment Form and get started today. We look forward to an opportunity to discuss any questions you may have.

# Table of Contents

- Letter of Confidentiality ..... 1
- Order Processing ..... 2
- Overview of Coverage and Exclusions & Claim Procedure ..... 3
- Repairs..... 4
- Claim Reimbursement Schedule ..... 5
- Dealer Enrollment Form ..... 6
- Dealer Enrollment Terms and Conditions ..... 7
- Form W-9 ..... 8
- Claim Form ..... 9
- Claim Repair Codes ..... 10
- Sample Certificate of Coverage ..... 11
- Sample Terms and Conditions..... 12
- Request for Transfer Form..... 13
- Cancellation Form..... 14
- HVAC Terminology ..... 15

**For questions or assistance with the program, please contact **AIG Client Support.****

AIG • Attention Client Support • PO Box 928 • Jeffersonville, IN 47130 USA  
Tel 866-538-8922 • Fax 866-211-9259 • HVACSupport@sndirect.com

## **Letter of Confidentiality**

Thank you for your decision to take advantage of the SelecRate Program administered by AIG.

In connection with our joint efforts, you will provide us with information including the names, addresses, and phone numbers of your customers. We understand that this information is confidential and is important to your current and future business. Therefore, AIG hereby agrees that any information received from your company will be deemed confidential and will not be disclosed to any person, firm, corporation or entity without your company's prior written consent, except that the information can be used by AIG's employees and/or other persons retained by AIG to process claims and accounting functions.

We are looking forward to a mutual and prosperous business relationship, with AIG working on your behalf.

## Order Processing

Simply visit Carrier's e-commerce website to place your order. The order must be received by AIG within six (6) months of sale. For assistance in placing your order, please contact your Carrier distributor.

Coverage can be offered to the consumer for residential installations up to five (5) years old. The contract will be retroactive to the date of installation.

### **ELIGIBILITY:**

To be eligible for coverage, the product must be in good working order at time of contract purchase. If it is determined that a claim results from a pre-existing condition, the payment of claim may be denied. Information regarding the original install date of the product must be correct. Inaccurate information regarding install date may result in the product being ineligible for coverage. We reserve the right to inspect the product at any time to determine eligibility for coverage.

### **ANNUAL MAINTENANCE:**

All products covered by contract require annual maintenance be performed by an authorized service technician as specified by the manufacturer. The contract does not cover normal, periodic or preventive maintenance or check-ups.

### **WAIT PERIOD:**

The product you are purchasing from AIG is an extended service agreement contract. The contract start date begins the later of thirty (30) days from contract purchase or upon expiration of the dealer's labor warranty, whichever is later. Residential contracts sold greater than twelve (12) months from the installation date have a ninety (90) day wait period. Claims or losses that occur prior to or during a wait period are not covered.

### **IMPORTANT NOTICE:**

The product to be covered under this Application Order Form has a specific make, model and serial number which were designated at time of manufacture. The information can be found on each product. It is your responsibility to verify the exact information for each product to be covered. If it is determined at time of claim or at any time during the term of the agreement that the make, model and serial number(s) do not match the information contained in the Application Order Form or actual contract, coverage may be declined.

# Overview of Coverage and Exclusions

## Overview

The contract is dependent on the coverage you purchased and inclusive of the manufacturer and dealer warranties. Please refer to the Terms and Conditions of the Service Contract for a complete listing of all conditions. *This is only a guide.*

## Covered Repairs Included

- Mechanical failures of covered equipment during normal operation.
- Accessories, provided that additional coverage is purchased.

## Exclusions

- Repairs as a result of installation error.
- Repairs resulting from a lack of proper maintenance.
- Normal, periodic or preventive maintenance service.
- Equipment not meeting the specifications set by the manufacturer and the Air Conditioning and Refrigeration Institute.

## What defines a “Residential” Application?

- Single-family dwelling/condominium occupied by one (1) family and where business is not conducted, and
- Equipment less than or equal to five (5) tons.

## Types of Coverage

- Labor Only
- Labor Plus
- Parts Only

# Claim Procedure

Coverage is limited to the equipment itself, i.e. no ductwork, field piping, etc., and does not include nuisance calls or normal maintenance. See the specifics concerning exclusions listed on the back of the actual contract. Claims must be submitted within sixty (60) days of equipment repair.

## To file a claim, please include the following:

- Completed claim form
- Contract number
- Original work order/invoice including customer signature
- Model and serial number of equipment

When multiple repairs are made, the highest repair code will be first, the second repair will be at 75% of the following highest code and the third and final code will be at 50%.

# Repairs

## Multiple Repairs

To alleviate any confusion regarding multiple repairs in regards to claims reimbursement, please note that claims with multiple repair codes allow for the highest cost repair to be applied first, then the second repair is at 75% and any additional repairs on the same ticket are 50% of the applicable repair code.

## Companion Repairs

Companion repairs are claims that are submitted as multiple repairs when in-fact they should be considered one repair. We refer to these as companion repairs as they are in-fact part of the same failure. The items below are considered for claims purposes to be one repair.

<b>PRIMARY</b>	<b>RESIDENTIAL COMPANION REPAIRS</b>
Blower Motor	Bracket Capacitor Squirrel Cage
Compressor	Accumulator Capacitor Contactor Drier Hard Start Kit King Valve / Service Valves Muffler Reversing Valve
Condenser Coil	Drier
Condenser Fan Motor	Blade Bracket Capacitor Contactor
Evaporator Coil	Drain Pan Drier TXV

If you have any questions, please contact our Claims Department at 866-538-8922.



# USA Residential Claim Reimbursement Schedule

Claims must be submitted within 60 days of equipment repair. Visit [www.HVACCoverageVerification.com](http://www.HVACCoverageVerification.com) to verify coverage.

Claims must be submitted within 60 days of equipment repair and require a copy of the work order with customer signature. Your claim also requires a copy of the part receipt in cases where parts are out of OEM warranty or the packing slip in cases where parts are under OEM warranty. Avoid claims delays by promptly submitting your claim requests and documents. Claims will not be processed until all required information is received.

## Schedule

Multiple repair codes: Pays single highest repair cost at 100%, second repair at 75%, and any additional repairs at 50%.  
 Companion repairs (part of the same failure): Pays one labor charge and one part allowance.  
 Only one part allowance is paid per claim.

Repair Code	Type of Labor Repair	Plan 1	Plan 2	Plan 3	Plan 4	
				<b>Trip/Service Call</b>	\$40	\$65
		<b>Part Allowance</b>	\$35	\$35	\$35	\$35
		Labor Repair Rate				
<b>A</b>	Replacement of electrical or mechanical components such as all circuit boards, all relays, water relief valve, thermocouple, thermostat, condenser fan blade, fan limit switch, door switch, control transformer. Water Heater: pressure relief valve, heating element-upper or lower, drain valve (cock), igniter, pilot tube assembly. Tankless Water Heater: P.C. board kit, water flow servo & sensor kit, bypass-servo assembly, surge protector, blower motor, manifold assembly-a (lpg), manifold assembly-a (nat. g), thermistor, electrode kit, flame rod kit. Boiler: flame sensor, aquastat, igniter, flue damper, low water cut-off, safety / pressure / mixing valve.	\$79	\$96	\$113	\$141	
<b>B</b>	Replacement of electrical or mechanical components such as blower motor, blower wheel, condenser fan motor, condenser fan blade & motor, heater package and heat strips, gas valve, fuel pump, burner ignition transformer, oil burner motor. Water Heater: burner assembly, gas valve, heating elements (both) upper and lower, dip tube, anode rod. Tankless Water Heater: gas control assembly kit. Boiler: repairs to items in piping system i.e. burner, gas valve, circulator and gaskets, motor replacements.	\$123	\$149	\$175	\$219	
<b>C</b>	Replacement of electrical or mechanical components such as shaft and bearings, gas burners, blower motor assembly, variable speed blower motor, variable speed module. Water Heater: (tank) all models and types up to 50 gallons.	\$158	\$192	\$225	\$282	
<b>D</b>	Minor repairs to sealed system such as TXV, factory joint leaks, refrigeration pressure switch, service valve. (Repair code includes leak search, refrigerant recovery time, refrigerant replacement, and dryer) Water Heater: (tank) all models and types over 50 gallons. Tankless Water Heater: heat exchanger assembly kit, thermal fuse harness. Boiler: major repairs such as heat exchanger or tank replacement.	\$245	\$298	\$350	\$438	
<b>E</b>	Major repairs to sealed system such as heat exchanger, compressor, reversing valve, condenser/evaporator coil replacement, accumulator or muffler. (Repair code includes leak search, refrigerant recovery time, refrigerant replacement, and dryer).	\$385	\$468	\$550	\$688	

## Coverage Type

<b>Labor Only:</b>	Coverage includes a service call and applicable repair code reimbursement. Part allowance is not covered.
<b>Labor Plus:</b>	Coverage includes a service call, part allowance (one per claim), and applicable repair code reimbursement.
<b>Parts Only:</b>	Coverage includes the cost of the part. Service call and part allowance is not covered.

## Examples

The coverage sold is Labor Only Plan 1. You completed a repair coded as "C".

Trip/Service Call	\$40
Part Allowance	N/A
Labor Repair Rate	\$158
Part Cost	N/A
<b>Total</b>	<b>\$198</b>

The coverage sold is Labor Plus, Plan 2. You completed a repair coded as "B".

Trip/Service Call	\$65
Part Allowance	\$35
Labor Repair Rate	\$149
Part Cost	N/A
<b>Total</b>	<b>\$249</b>

The coverage sold is Parts Only and the part is out of warranty. You replaced \$350 in parts.

Trip/Service Call	N/A
Part Allowance	N/A
Labor Repair Rate	N/A
Part Cost	\$350
<b>Total</b>	<b>\$350</b>





We do not sell, trade or rent your personal information to any third party. The information is collected primarily to ensure that we are able to fulfill your requirements.

Date of Enrollment: Default (Date enrollment is received by AIG or postmarked via US mail.)

Items in **bold** are required.

**Dealer Information**

**Company Name:** \_\_\_\_\_

**Company Owner:** \_\_\_\_\_  
(Company Contact) (First) (Last)

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip Code:** \_\_\_\_\_ **Country:**  USA

**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**Distributor Information**

**Primary Wholesale Distributor Name:** \_\_\_\_\_ **Dealer ID:** \_\_\_\_\_

**Company Contacts**

**Accounts Payable Contact:** \_\_\_\_\_ **Phone Number:** \_\_\_\_\_

**Service Manager Contact:** \_\_\_\_\_ **Phone Number:** \_\_\_\_\_

**Coverage Area Zip Codes:** \_\_\_\_\_

**Service Department Information**

**Hours of Operation** SUN: \_\_\_\_\_ MON: \_\_\_\_\_ TUES: \_\_\_\_\_ WED: \_\_\_\_\_ THUR: \_\_\_\_\_ FRI: \_\_\_\_\_ SAT: \_\_\_\_\_

**Number of Sales Staff:** \_\_\_\_\_ **Number of Service Technicians:** \_\_\_\_\_

**Phone During Business Hours:** \_\_\_\_\_ **Phone After Business Hours:** \_\_\_\_\_

**Insurance Documents**

*Prior to becoming an authorized AIG servicer, servicer must provide AIG with a copy of its current Certificate of Insurance, which shows workers compensation and general liability insurance of no less than \$500,000.00 (USD). If you are a part of our dispatch service network, workers compensation and general liability insurance must be no less than \$1,500,000.00 (USD). AIG's name and address must be shown as certificate holder. AIG, 650 Missouri Ave., Jeffersonville, IN 47130.*

**General Liability:**  I have included a copy of my general liability insurance of no less than \$500,000.00

**Workman's Compensation (select one):**  I have included a copy of my workers' compensation insurance.  
 My state does not require workers' compensation by law and I have \_\_\_\_\_ employees.

**Federal & Licensing Documents**

*Please provide your Federal Tax Identification Number (FEIN). Due to potential privacy risks, compliance requirements, and security, we cannot accept social security numbers in lieu of an FEIN. If you need to obtain a free FEIN, please visit [www.irs.gov](http://www.irs.gov), or follow this link [Apply for an Employer Identification Number \(EIN\) Online](#).*

**Federal Licensing:**  I have included a copy of my W-9 Form and my FEIN is \_\_\_\_\_

*A service warranty license and agent appointment is required in the State of Florida in order to sell service warranties. This is required for all FL and any non-FL dealer/distributor selling to a FL customer. This number is subject to verification.*

**Florida 2-52 License (select one):**  I have included a copy of my Florida 2-52 license. My 2-52 License number is \_\_\_\_\_  
 I do not sell to consumers in Florida and to the best of my knowledge this requirement does not apply to me.

**Dealer Terms and Conditions**

I certify that the information contained in this section is true and complete to the best of my knowledge and that I have read the accompanying servicing installer terms and conditions that apply to this enrollment form.

**Owner/Manager Signature:** \_\_\_\_\_ **Print Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Please fax this completed form and supporting documentation to AIG at 866-212-3750**

Alternative Submission Options: Mail or email this completed form to AIG  
Attention HVAC Enrollments • PO Box 928 • Jeffersonville, IN 47130 • (t) 866-538-8922 • (f) 866-212-3750 • HVACEnrollments@sndirect.com

# DEALER ENROLLMENT TERMS AND CONDITIONS

## AUTHORIZATION TO SELL SERVICE NET EXTENDED SERVICE AGREEMENTS

The parties agree that, upon the execution (which includes Dealer's electronic acceptance) of the Dealer Enrollment Form ("Enrollment Agreement") between Service Net Warranty, LLC ("Service Net") and the executing dealer ("Dealer"), Dealer shall be authorized to offer the Service Net Extended Service Agreement ("Service Agreement") for sale to its customers subject to the following terms and conditions:

### LIMITED AUTHORITY

Service Net authorizes Dealer to sell to its customers applicable Service Agreements on heating, ventilation, air conditioning and refrigeration equipment pursuant to the express terms of this Enrollment Agreement and the applicable sales/service guidelines. Any act taken by the Dealer and/or its agents that is outside the scope of this Enrollment Agreement and the sales guidelines shall not be authorized, and shall be deemed a breach of this Enrollment Agreement. Dealer shall be liable to Service Net for all damages, costs and fees arising out of Dealer's acts outside the scope of its authority.

### WARRANTIES AND REPRESENTATIONS

Dealer hereby represents and warrants to Service Net as follows:

- Dealer shall promptly, but in no event later than six (6) months from date of purchase of Service Agreement, notify Service Net of each sale of a Service Agreement by Dealer through entry of the sales order, and all information regarding such sale requested by Service Net, into the online point of sale entry portal at the Carrier Enterprise e-commerce website. Dealer shall accurately identify the covered product and holder of such Service Agreement;
- Each sales order of a Service Agreement submitted by Dealer to Service Net shall be paid in full by Dealer. Dealer shall inform each holder of a Service Agreement that the Service Agreement shall not be valid unless and until Dealer submits such order and Service Net is paid;
- Dealer acknowledges and agrees that the only valid submission method accepted by Service Net for the sale of Service Agreements is through the Carrier Enterprise e-commerce online point of sale entry portal. Service Net will not accept an attempted submission of a Service Agreement sale by any other method, and Dealer understands that it will be fully responsible for any claims incurred under Service Agreements which are not properly submitted and fully paid;
- Each and every claim submitted by Dealer to Service Net shall be true, genuine and authentic, shall represent services actually performed by Dealer on the equipment covered under the applicable Service Agreement and parts actually used for the benefit of the holder of the Service Agreement as set forth in the claim, and shall be covered under the Service Agreement. Claims made for parts and labor which were not a result of an equipment failure will not be reimbursed by Service Net;
- Any application for a Service Agreement submitted to Service Net after six (6) months from the date of purchase shall be void. Service Net shall have no obligation to the Dealer or applicant there under and Dealer shall be responsible for any and all claims related to such application and shall indemnify Service Net for any damages related to such claims;
- If Dealer did not submit the related Service Agreement to Service Net and/or remit the appropriate sum for such Service Agreement pursuant to the terms of this Enrollment Agreement, Service Net may, in its sole discretion, accept such Service Agreements; provided that Dealer shall not be reimbursed for any such claims reported prior to Dealer's submission of the sales order for such Service Agreement, including payment of the full amount due for such Service Agreement. After Dealer has made payment for the full amount due and any such claims, Service Net may then accept responsibility to

investigate, process, adjust and arrange for the payment of any further valid claims covered by the Service Agreement after ninety (90) days;

- Dealer shall collect any applicable sales tax incurred on the sale of Service Agreements and remit such taxes to the appropriate tax authority; and
- In those states considered "Dealer Obligor" (CA, CO, MA, ME, NC, NJ, OR, PA, TX and VA), the Dealer shall be considered the obligor under the Service Agreement, but shall be named as an additional insured under Service Net's applicable contractual liability insurance policy.

Dealer agrees that it shall not initiate any repair(s) for the Service Agreement holder without checking the date and terms of the respective Service Agreement. During the respective Service Agreement period, Dealer shall give Service Net any factory warranty or warranties on all new products and new parts. Service Net reserves the right to require Dealer to preauthorize all repairs.

### CLAIMS

Dealer shall have the right to refuse any service work or service calls. Dealer shall be obligated to provide the service required with one (1) person per job hour at the rates permitted in the applicable Service Agreement, with no overtime, holiday pay, or other charges without the prior written consent of Service Net. Dealer shall warrant its service (labor and parts) for ninety (90) days on all repairs or replacements made within the term of the Service Agreement and shall remedy failures with ninety (90) days WITHOUT additional charge to Service Net. Service Net shall pay valid claims within thirty (30) days from receipt of all necessary claims documentation by its claims department.

All claim paperwork must be filed by Dealer with Service Net within sixty (60) days from date of repair. Paperwork includes claim form, signed and completed field service ticket, and cost back-up at minimum. Claims not submitted within sixty (60) days will become the responsibility of the Dealer.

### OWNERSHIP OF INTELLECTUAL PROPERTY

Service Net is the sole owner or an authorized licensee of any and all copyrights, service marks, trademarks, trade names, trade dress, patents and all other intellectual property (collectively referred to as the "Intellectual Property") used by Service Net in its business, including, but not limited to, the "Service Net®" trademark and all associated trademarks and service marks. All Intellectual Property is, and shall remain, the sole and exclusive property of Service Net and its licensors, and nothing in this Enrollment Agreement shall grant or convey to Dealer any rights to, or licenses in, the Intellectual Property except as expressly provided for herein.

### USE OF SERVICE NET NAME

Thirty (30) days prior to implementing any sales, marketing or customer solicitation program (e.g., direct mailing, brochure describing services or Service Agreement, advertisements, etc.) which, in any manner, uses or otherwise exploits the "Service Net" name or trademark, or any other Intellectual Property, Dealer must notify Service Net's marketing division at 866-538-8922 of said program, and must obtain Service Net's written approval of said program and use or other exploitation of the "Service Net" name, trademark or other Intellectual Property. Service Net shall have the sole and exclusive right to reject any such program or campaign for any reason whatsoever. In the event Dealer fails to notify Service Net as set forth above, or fails to obtain the required approval of the program, Dealer shall have no right to use or otherwise exploit the "Service Net" name or trademark, or any other Intellectual Property, in said program in any manner whatsoever.

### TERMINATION

Subject to the terms of this paragraph, either party may terminate this Enrollment Agreement at any time, with or without cause, upon thirty (30) days prior written notice to the other party. In the event Service Net discovers evidence of a Dealer's (or its agent's) material fraud, misrepresentation or breach of this Enrollment Agreement, Service Net shall promptly notify Dealer, in writing, of its evidence and findings. Upon such an event and prior written notice to Dealer, Service Net may take such action as it deems reasonable and necessary, including but not limited to (i) requiring the Dealer to immediately terminate any agent(s) or employee(s) found to have engaged in material fraud, misrepresentation or breach, (ii) conducting an accounting and review of Dealer's books and records, (iii) requiring Dealer to implement certain internal procedures to reduce the incidence of such fraud, misrepresentation or breach, or (iv) immediately terminating this Enrollment Agreement; provided, however, that immediate termination shall only be upon a good faith finding that Dealer is no longer selling and installing the brand of heating, ventilation, air conditioning, and refrigeration equipment covered by the service agreement, has engaged in a pattern and practice of fraud, misrepresentation and breach, or has failed to take reasonable and necessary measures to prevent such fraud, misrepresentation or breach by its agent(s) or employee(s) after being put on notice of the same. Upon such termination, Dealer shall have no further right to sell, market or deal in Service Agreements, or any Service Net product, in any manner or on behalf of any party, and Dealer shall have no further right to, directly or indirectly, submit any claim or claims, regardless of their nature and timing, under or pursuant to said Service Agreements.

### CANCELLATION

In the event of a cancellation of a Service Agreement, Service Net shall promptly refund Service Net's pro-rata portion of the monies it received from the sale of the original Service Agreement. Dealer shall promptly return the pro-rata purchase price of the Service Agreement to the respective holder of the Service Agreement in accordance with the Service Agreement. For details on cancellation of a Service Agreement, please refer to the Service Net Terms and Conditions.

### ENFORCEMENT

Notwithstanding anything else contained herein, Service Net may seek a temporary restraining order, preliminary injunction and/or a permanent injunction in order to prevent the Dealer from continuing to sell, offering or marketing Service Agreements or from continuing to represent itself as an authorized dealer, agent or representative of Service Net.

### ATTORNEYS FEES

In the event of litigation between the parties for any matter arising out of, related to or connected with this Enrollment Agreement or the Service Agreement(s), or the breach or non-performance hereof, if Service Net is the prevailing party in such litigation, Service Net shall be entitled to recover against Dealer reasonable attorneys' fees, expenses and court costs at all levels.

### GOVERNING LAW

Indiana law, including its laws governing the conflicts of laws, shall govern this Enrollment Agreement and any and all disputes arising hereunder or related hereto. The expense of the disputes shall be borne by Dealer. All disputes shall take place in Chicago, Illinois USA.

**EXCEPT FOR MODIFICATION TO THE SERVICE AGREEMENT AND THE SALES/SERVICE GUIDELINES, (WHICH SHALL BECOME EFFECTIVE FOR SUBSEQUENT SALES AND SUBSEQUENT SERVICE UPON POSTING BY SERVICE NET), ANY MODIFICATIONS IN THE ABOVE TERMS AND CONDITIONS SHALL NOT BE EFFECTIVE OR ACCEPTED WITHOUT A PRIOR WRITTEN CONSENT SIGNED BY AN OFFICER OF SERVICE NET.**

## Request for Taxpayer Identification Number and Certification

**Give Form to the  
requester. Do not  
send to the IRS.**

<b>Print or type See Specific Instructions on page 2.</b>	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification: <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate  <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____  <input type="checkbox"/> Other (see instructions) ▶ _____	
	<input type="checkbox"/> Exempt payee	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
City, state, and ZIP code		
List account number(s) here (optional)		

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number									

**Note.** If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Employer identification number									

### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
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### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

#### Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.



# USA Residential Claims Form

Claims must be submitted within 60 days of equipment repair.  
Visit [www.HVACCoverageVerification.com](http://www.HVACCoverageVerification.com) to verify coverage.

Claims must be submitted within 60 days of equipment repair and require a copy of the work order with customer signature. Your claim also requires a copy of the part receipt in cases where parts are out of OEM warranty or the packing slip in cases where parts are under OEM warranty. Avoid claims delays by promptly submitting your claim requests and documents. Claims will not be processed until all required information is received.

Claims Submission Date: \_\_\_\_\_ Default \_\_\_\_\_ (Date claim is received by AIG or postmarked via US mail.)

Items in **bold** are required.

### Claim Information

Invoice Date: \_\_\_\_\_ Dealer Invoice #: \_\_\_\_\_ Contract Number: \_\_\_\_\_  
 Date of Failure: \_\_\_\_\_ Date of Service: \_\_\_\_\_ Date of Most Recent Maintenance: \_\_\_\_\_  
 Model #: \_\_\_\_\_ Serial #: \_\_\_\_\_  
 Complaint/Work Performed: \_\_\_\_\_

### Service Information

Service Name: \_\_\_\_\_ Serving Tech: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Street Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

### Customer Information

Equipment Owner: \_\_\_\_\_ Phone: \_\_\_\_\_  
 (Company Contact) (First) (Last)  
 Installation Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

### Reimbursement Schedule

Multiple repair codes: Pays single highest repair cost at 100%, second repair at 75%, and any additional repairs at 50%.  
 Companion repairs (part of the same failure): Pays one labor charge and one part allowance.  
 Only one part allowance is paid per claim.

	Plan 1	Plan 2	Plan 3	Plan 4
Trip/Service Call	\$40	\$65	\$85	\$95
Part Allowance	\$35	\$35	\$35	\$35

Repair Code	Type of Labor Repair	Labor Repair Rate			
A	Replacement of electrical or mechanical components such as all circuit boards, all relays, water relief valve, thermocouple, thermostat, condenser fan blade, fan limit switch, door switch, control transformer. Water Heater: pressure relief valve, heating element-upper or lower, drain valve (cock), igniter, pilot tube assembly. Tankless Water Heater: P.C. board kit, water flow servo & sensor kit, bypass-servo assembly, surge protector, blower motor, manifold assembly-a (lpg), manifold assembly-a (nat. g), thermistor, electrode kit, flame rod kit. Boiler: flame sensor, aquastat, igniter, flue damper, low water cut-off, safety / pressure / mixing valve.	\$79	\$96	\$113	\$141
B	Replacement of electrical or mechanical components such as blower motor, blower wheel, condenser fan motor, condenser fan blade & motor, heater package and heat strips, gas valve, fuel pump, burner ignition transformer, oil burner motor. Water Heater: burner assembly, gas valve, heating elements (both) upper and lower, dip tube, anode rod. Tankless Water Heater: gas control assembly kit. Boiler: repairs to items in piping system i.e. burner, gas valve, circulator and gaskets, motor replacements.	\$123	\$149	\$175	\$219
C	Replacement of electrical or mechanical components such as shaft and bearings, gas burners, blower motor assembly, variable speed blower motor, variable speed module. Water Heater: (tank) all models and types up to 50 gallons.	\$158	\$192	\$225	\$282
D	Minor repairs to sealed system such as TXV, factory joint leaks, refrigeration pressure switch, service valve. (Repair code includes leak search, refrigerant recovery time, refrigerant replacement, and dryer) Water Heater: (tank) all models and types over 50 gallons. Tankless Water Heater: heat exchanger assembly kit, thermal fuse harness. Boiler: major repairs such as heat exchanger or tank replacement.	\$245	\$298	\$350	\$438
E	Major repairs to sealed system such as heat exchanger, compressor, reversing valve, condenser/evaporator coil replacement, accumulator or muffler. (Repair code includes leak search, refrigerant recovery time, refrigerant replacement, and dryer).	\$385	\$468	\$550	\$688

Not applicable for Parts Only → Trip/Service Call \$ \_\_\_\_\_

Part Allowance \$ \_\_\_\_\_

A receipt for parts is required if you enter a value in this field → Cost of Parts Out of Warranty \$ \_\_\_\_\_

Single Highest Repair Code \_\_\_\_\_ Repair Rate \$ \_\_\_\_\_ x 100% = \$ \_\_\_\_\_

Second Repair Code \_\_\_\_\_ Repair Rate \$ \_\_\_\_\_ x 75% = \$ \_\_\_\_\_

Additional Repair Code \_\_\_\_\_ Repair Rate \$ \_\_\_\_\_ x 50% = \$ \_\_\_\_\_

If Applicable, Sales Tax at \_\_\_\_\_ % \$ \_\_\_\_\_

Total Due \$

Submit your claim online 24/7 by visiting <https://www.ClimateShieldComplete.com>

Upload your work order and receipt for parts to the contract prior to each online claim submission.

Alternative Submission Options: Mail, fax or email 1) this completed form, 2) customer work order w/ customer signature, and if applicable 3) receipt for parts to AIG  
Attention HVAC Claims • 650 Missouri Ave • Jeffersonville, IN 47130 • (t) 866-538-8922 • (f) 866-244-0156 • HVACClaims@sndirect.com

# Claim Repair Codes

## Repair Code by Part

ACCUMULATOR	
<b>Covered</b>	
E	Replace Accumulator or Muffler

BLOWER MOTOR & WHEEL	
<b>Covered</b>	
B	Replace Blower Motor
B	Replace Blower Motor and Wheel
B	Replace Blower Wheel
C	Replace Variable Speed Blower Motor and Wheel
C	Replace Variable Speed Blower Motor
C	Replace Variable Speed Module
<i>Capacitors are included if changed with a motor</i>	
<b>Not Covered</b>	
Adjust Blower Wheel	
Pull and Clean Blower Wheel	

BOILERS	
<b>Covered</b>	
E	Replace Blast Tubes
C	Replace Circulators
C	Replace Diffuser Cones
C	Replace Expansion Tanks
D	Replace Firebox
A	Replace Multiple Zone Control
A	Replace Solenoid Valves
A	Replace Switching Relays
B	Replace Triple Aqua Stats
C	Replace Zone Valves (complete)
A	Replace Zone Valves (power head)
<b>Not Covered</b>	
Anti-Scald Valves for HW from Tankless Coil	
Backflow Preventers	
Feed Water Regulators	
Flow Checks	

BREAKERS	
<b>Covered</b>	
A	Replace Circuit Breaker (internal only)
A	Replace Low Voltage Fuse (internal only)
A	Replace High Voltage Fuse (internal only)
<b>Not Covered</b>	
Reset & Test/Tighten	
Replace 30/60 Amp Disconnect	

BURNER	
<b>Covered</b>	
C	Replace Burner
<b>Not Covered</b>	
Pull and Clean Burner	

CAPACITOR (Only Repair)	
<b>Covered</b>	
A	Replace Dual Capacitor
A	Replace Single Capacitor

CIRCUIT BOARD	
<b>Covered</b>	
A	Replace Circuit Board

COMPRESSOR	
<b>Covered</b>	
A	Repair Terminal
E	Replace Compressor
A	Replace Crankcase Heater (if factory supplied)
A	Replace Start Assist Assembly
<b>Not Covered</b>	
Add Sound Blanket	
Replace Sound Blanket	

CONDENSER COIL	
<b>Covered</b>	
E	Leak Repair
E	Replace Condenser Coil
<b>Not Covered</b>	
Clean Condenser Coil	
Straighten Fins	

CONDENSER FAN	
<b>Covered</b>	
A	Replace Condenser Fan Blade
B	Replace Condenser Fan Blade and Motor
B	Replace Condenser Motor

CONTACTOR	
<b>Covered</b>	
A	Replace Contactor
A	Replace Two Speed Contactor

DEFROST	
<b>Covered</b>	
A	Replace Circuit Board/Timer
A	Replace Relay
A	Replace Thermostat
A	Replace Two Speed Circuit Board
<b>Not Covered</b>	
Clean and Adjust Light Pilot Assembly	
Clean Flame Sensor	

DRIER	
<b>Covered</b>	
D	Replace Filter Drier (no parts, process fee only)

ELECTRONIC AIR CLEANER	
<b>Covered</b>	
A	Replace Air Pressure Switch
B	Replace Cells
A	Replace Cell Handle
A	Replace Current Sensing Relay
A	Replace Ionizing Wire
A	Replace Power Pack
<b>Not Covered</b>	
Clean Cells and Pre Filters	
Replace Pre Filter	

ELECTRIC HEAT	
<b>Covered</b>	
B	Heater Package
A	Replace Fusible Link
A	Replace High Limit
A	Replace Sequencer/Heat Relay

EVAPORATOR (Coil Leak)	
<b>Covered</b>	
E	Replace Evaporator Coil
D	Simple Leak Repair
<b>Not Covered</b>	
Cleaning	

FAN BELT	
<b>Covered</b> (if the cause of repair)	
A	Replace Fan Belt
<b>Not Covered</b>	
Maintenance	

FAN & LIMITS	
<b>Covered</b>	
A	Replace Door Switch
A	Replace Fan Center Control
A	Replace Fan Limit
A	Replace Fan Relay/Time Delay
A	Replace Limit Snap Disk/Fixed/Fusible/Rollout

FILTERS	
<b>Not Covered</b>	
Clean or Replace	

FLUE	
<b>Not Covered</b>	
Clean Obstruction	
Replace Flue Cap or Elbow	

GAS VALVE	
<b>Covered</b>	
B	Replace Single Stage Gas Valve
B	Replace Two Stage Gas Valve
<b>Not Covered</b>	
Adjust Gas Pressure	
Conversion Kit Standing Pilot to Spark Ignition	
Replace Gas Shut Off/Union/Gas Flex	

HEAT EXCHANGER	
<b>Covered</b>	
E	Replace Heat Exchanger
<b>Not Covered</b>	
Clean Heat Exchanger	
Simple Carbon Monoxide Test	

HUMIDIFIER	
<b>Covered</b>	
A	Replace Current Sensing Relay
A	Replace Humidistat
A	Replace Orifice
A	Replace Saddle Valve
A	Replace Solenoid Valve
<b>Not Covered</b>	
Replace Humidifier Pad	

IGNITION	
<b>Covered</b>	
A	Replace Hot Surface Igniter/Flame Sensor
A	Replace Standing Pilot Assembly
A	Replace Thermocouple

INDUCER	
<b>Covered</b>	
A	Replace Motor
A	Replace Motor Assembly and Wheel
A	Replace Pressure Switch
A	Replace Sail Switch
A	Replace Wheel
<b>Not Covered</b>	
Clean and Adjust Inducer	

LEAK SEARCH	
<b>Covered</b> (included in repair cost of C, D & E)	

LOW VOLTAGE	
<b>Covered</b>	
A	Replace Fuse (internal only)
A	Replace Transformer
<b>Not Covered</b>	
N/A	

METERING DEVICE	
<b>Covered</b>	
D	Replace Access Valve
C	Replace Schrader
D	Replace Service Valve Recovery
D	Replace TXV
<b>Not Covered</b>	
Clean Piston Blockage	
Schrader Caps	

MINI-SPLIT	
<b>Covered</b>	
C	Replace Indoor or Outdoor Mini-Split Unit

OIL FURNACE	
<b>Covered</b>	
C	Reline Oil Burner
A	Replace Auto Shut-Off Valve
A	Replace Electrodes
B	Replace Fuel Pump
C	Replace Oil Burner Assembly
B	Replace Oil Burner Motor
A	Replace Oil Ignition Transformer
A	Replace Oil Pump Coupling
A	Replace Primary with Accustat
A	Replace Protector Relay
A	Replace Stack Control
A	Replace Stack Switch
<b>Not Covered</b>	
Cleaning	
Replace Fuel Filter Cartridge	
Replace Fuel Oil Filter Assembly	
Replace Oil Nozzle	

PRESSURE SWITCH (Refrigeration)	
<b>Covered</b>	
D	Replace Hi/Lo Pressure Switch
C	Replace Threaded Hi/Lo Pressure Switch with Schrader

REVERSING VALVE	
<b>Covered</b>	
A	Replace Electrical Coil
E	Replace Reversing Valve
F	Replace Both at the Same Time

THERMOSTAT	
<b>Covered</b>	
A	Deluxe Programmable Heat Pump Thermostat
A	Deluxe Programmable Thermostat
A	Heat Pump Thermostat
A	Programmable Heat Pump Thermostat
A	Programmable Thermostat
A	Thermostat
<b>Not Covered</b>	
Adjust Heat Anticipator	
Calibrate Thermostat	
Replace Thermostat Wire (one man. up to 50 ft) External Wiring	

ULTRAVIOLET	
<b>Covered</b>	
A	Replace Circuit Board/Ballast
<b>Not Covered</b>	
Replace Bulb	

WATER LEAK	
<b>Covered</b>	
A	Replace Condensate Pump
D	Replace Drain Pan
<b>Not Covered</b>	
Clean/Blow-Out Drain	
Replace Auxiliary Drain Float Switch	
Replace Auxiliary Drain Pan	
Replace Condensate Drain	

WIRING	
<b>Covered</b>	
A	Replace Low Voltage Fuse
<b>Not Covered</b>	
Minor Repair Locate Short	
Replace Thermostat Wire	
Replace Thermostat Wire (one man. up to 50 ft) External Wiring	

MISCELLANEOUS (*Equipment must be listed on contract)	
<b>Covered</b>	
B	*Repair Gas Leak Inside Unit Only (factory fittings only)
A	*Replace Low Ambient Kit/Freeze Stat
<b>Not Covered</b>	
Minor Repair Tape or Re-Attach Ductwork	
Overnight Shipping Fee	

**DEALER:**

Dealer Name  
 123 Main Street  
 City, State, Zip

**ISSUED TO:**

DAVID DOE  
 123 MAIN STREET  
 CITY, ST, ZIP

## CERTIFICATE OF COVERAGE

Thank you for purchasing a Service Contract.

Please read both sides of this Certificate of Coverage carefully as this Contract is subject to all listed conditions and provisions. **IMPORTANT NOTICE:** ANNUAL MAINTENANCE must be performed by Your dealer or an authorized service technician. Failure to do so can result in denial of service.

CERTIFICATE NUMBER: 123456789000000  
 CONTRACT RETAIL PRICE: \$XX.XX  
 ORDER NUMBER: 0123456789  
 TYPE OF SERVICE: TYPE OF SERVICE

PRODUCT NAME	PRODUCT MANUFACTURER	MODEL NUMBER	SERIAL NUMBER	EFFECTIVE DATE	EXPIRATION DATE
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**FOR REPAIR SERVICE CALL: 1-800-XXX-XXXX**

Prior authorization may be required before any service can be performed. Parts and Labor currently covered under either the manufacturer or dealer warranty will be provided by the manufacturer or dealer.

**Thank You!**

## SERVICE CONTRACT COMPREHENSIVE COVERAGE

This document sets forth the entire Contract between the Service Contract Administrator, hereinafter referred to as We, Us and Our, and the Purchaser, hereinafter referred to as You and Your. No representation, promise or condition herein shall modify these terms. Service Net Warranty, LLC ("Service Net") is contractually obligated to You to provide service under this Contract where in accordance with and as allowed by state law. If this Contract is purchased in Florida or Oklahoma, Service Net Solutions of Florida, LLC is contractually obligated to You to provide service under this Contract.

**1. WHAT IS COVERED.** Depending on the coverage You purchased, We will furnish a diagnostic charge; labor; parts; and/or replacement equipment (or pay for same) necessary to repair operational or mechanical breakdowns of the Product specified in this Contract, provided such service is necessitated by Product failure during normal usage. The Product specified and covered includes only equipment as originally configured and installed at time of purchase and charged for in this Contract. Coverage also applies to the parts and accessories that are necessary to the covered Product's functionality, but does not apply to accessories used in conjunction with or to enhance the performance of the covered Product. This Contract is inclusive of the manufacturer and dealer warranty, as reported to Us by Your dealer, and does not replace the reported warranties. Please refer to Your original purchase receipt for specific details on the reported warranties. Important Note: Some manufacturers offer longer parts warranties as registration incentives. Contact the manufacturer of Your product for information.

**2. ELIGIBILITY.** If You purchased Your Contract greater than twelve (12) months from Your Product's original install date, this section applies to you. Contract purchase must be within sixty (60) months of original Product installation date. To be eligible for coverage, the Product must be in good working order at time of Contract purchase. If it is determined that a claim results from a pre-existing condition, the payment of claim may be denied. Information regarding the original install date of the product must be correct. Inaccurate information regarding install date may result in the product being ineligible for coverage. We reserve the right to inspect Your Product at any time to determine eligibility for coverage.

**3. WAIT PERIOD.** Coverage begins thirty (30) days from contract purchase or upon expiration of the dealer's labor warranty, whichever is later, unless the contract is sold greater than twelve (12) months from the Product's installation date. If the contract is sold greater than twelve (12) months from the installation date, there is a ninety (90) day wait period. Claims or losses that occur prior to or during the wait period are not covered by Your Contract.

**4. ANNUAL MAINTENANCE.** All Products covered by this Contract require annual maintenance performed by an authorized service technician and as specified by the manufacturer. You may be required to submit proof of annual maintenance in the event of a claim. Lack of annual maintenance or failure to provide proof of annual maintenance may result in denial of payment for claims under Your Contract. You will be responsible for payment of denied claims due to the lack of annual maintenance or failure to provide proof of annual maintenance.

**5. TO OBTAIN SERVICE.** If service is required, contact the number shown on the front side of this Contract and explain the problem. Prior to any repair being made, the dealer may be required to follow authorization procedures. In these cases, any claim for repairs without authorization will not be covered except as provided under emergency repairs.

**6. AVAILABILITY OF SERVICE.** Neither Us nor the dealer shall be liable for any damages whatsoever arising out of delays, either before or after a day or time of service is agreed upon.

**7. ACCESSIBILITY OF PRODUCT.** If onsite service is required, You agree to make the Product reasonably accessible to the authorized service technician. If the Product is not accessible, the authorized service technician will have the option of declining to provide service or assessing You an additional charge, which will not be covered by Us, for making the Product accessible, commensurate with the difficulty in working on the Product. All service fees incurred by Us will be applied to the maximum liability of this Contract.

**8. TERMINATION FOR OTHER CAUSE.** Any attempts by YOU to repair or alter the Product, or if We cannot provide service due to removal or alteration of serial number, or because You have committed fraud upon us, at our discretion we may terminate this Contract without liability. If We exercise this right, You will receive a pro rata refund of one-hundred (100%) of the purchase price of Your Contract based on the time remaining on Your plan less the value of any services or claims that have been provided or paid.

**9. IMPORTANT NOTE.** Repairs recommended by the authorized service center not necessitated by mechanical breakdown are not covered unless specifically authorized by Us. We reserve the right to inspect the Product prior to coverage determination or during the coverage period. Model number, serial number and original date of purchase of all Products to be covered must be provided to initiate a request for service. If You request a service call for a non-covered repair or "no failure found" diagnosis is determined for the same problem on a second trip, You may be responsible for all costs associated with the repair/call. In the event You are unable to meet the authorized service technician, You must call to cancel the appointment one (1) business day prior to the agreed upon time of service or You may be responsible for paying the second trip charge for the subsequent rescheduled repair. If the Product is found to be performing to the manufacturer's specifications, service will not be authorized and You will be responsible for costs incurred.

**10. TIME FOR SERVICE.** Service will be performed during the hours of 8:00 a.m. to 5:00 p.m. local time Monday through Friday, excluding holidays or during the hours of operation of the participating authorized service center. Any additional costs above the authorized rates (premium or overtime charges) or after hours service will be at Your expense with exception of health related or severe weather related emergencies.

**11. PLACE OF SERVICE.** Onsite service will be provided at the address listed on the front side of Your Contract. Service will be performed by the Dealer named on the front side of this Contract, or by an authorized service technician.

**12. UNABLE TO REPAIR.** If We determine that We are unable to repair Your Product due to the unavailability of functional parts, service or technical information, or if the cost to repair will exceed the Claims Limitation as described herein, the total liability owed to You under this Contract will be the lesser of (I) the current market value of a Product of comparable specifications; or, (II) the retail price paid for Your Product minus sales tax and claims paid, in lieu of service repairs or replacement of a Product of comparable specifications. In all cases where parts or technical information are on extended backorder for a minimum of sixty (60) calendar days, We will determine if a replacement or reimbursement will be made. All contractual obligations

are fulfilled, in lieu of repairs, upon Product replacement, reimbursement or Contract term expiration and the covered Product becomes the property of Service Net and We may, at Our discretion, require the Product to be returned to Us (or Our designee) at Our expense.

**13. DEDUCTIBLE.** A per claim deductible may apply to your contract. If a deductible applies, the amount is stated on the front side of Your Contract.

**14. RENEWABILITY.** This Contract is renewable at Our sole discretion.

**15. LIMITATIONS OF COVERAGE – This Contract Does Not Cover:**

- a. Any Product located outside the continental United States, Alaska, and Hawaii.
- b. Service required as a result of any alteration of the equipment, or repairs made by anyone other than an authorized service technician. This would include any unauthorized alterations made by You to the Product.
- c. Damage or other equipment failure due to causes beyond Our control including, but not limited to, repairs necessary due to operator negligence, the failure to maintain the equipment according to the owner's manual instructions, abuse, vandalism, theft, fire, flood, wind, freezing, power failure, inadequate power supply, unusual atmospheric conditions, acts of war or acts of Nature.
- d. Service necessary because of improper storage, improper ventilation, or any utilization of the equipment that is inconsistent with either the design of the equipment, the specifications set by the manufacturer or Air Conditioning and Refrigeration Institute, or the way the manufacturer intended the equipment to be used. Any installation that prevents normal service.
- e. Any and all cases in which the manufacturer of the equipment would not honor any warranty regarding the equipment.
- f. Cosmetic defects, damage, or failures of non-operational components that do not inhibit the proper operation and performance of the covered items.
- g. Consumable items defined as any part that is considered consumable by the manufacturer or any item that is designed to be consumed (wear out) during the life of the Product, regardless if it is consumer replaceable or not.
- h. Registers, batteries, grills, key valves, duct work, plumbing, venting, belts, dampers or nuisance calls such as resetting breakers, low or dead thermostat batteries and adjustments made to programming.
- i. Repairs to Product, including parts, labor, or Product replacement covered by the reported manufacturer warranty, reported dealer warranty, manufacturer's recall, or similar manufacturer's incentive or repair program (regardless of whether or not the manufacturer or dealer is doing business as an ongoing enterprise).
- j. Consequential damages as a result of malfunctioning or of damage to an operating part of the covered equipment, or damages as a result of any repairs or replacements under this Contract.
- k. Loss of use, loss of business, loss of profits, down-time and charges for time and effort.
- l. Damages caused by delays in rendering service or loss of use during the period that the Product is at the authorized service center or otherwise awaiting parts are not covered. Rentals and "loaner" equipment are not covered.
- m. Damage or failure caused by animals or insects.
- n. Operational or mechanical failure which is not reported prior to expiration of this Contract or within 60 days of Product failure.
- o. Equipment sold without a manufacturer's warranty, sold "as is" or refurbished Products.
- p. Normal, periodic or preventative maintenance and/or checkups, including but not limited to customer education, adjustments, cleanings, and convergence. Regular maintenance, maintenance parts such as filters, lubricants, oil nozzles or any Product that has been altered or misused or requires replacement due to normal wear, accidents or lack of proper maintenance. Refrigerant as a top-off or stand alone repair.
- q. Pre-existing conditions (incurred prior to the effective date of coverage), known to You or discovered during annual maintenance.
- r. Equipment where the serial plate attached to the equipment is removed, defaced or made illegible.
- s. Damage resulting from user facilitated minor adjustments and settings outlined in the Product's owner's manual, inaccessible products or parts, negligence, misuse or abuse whether willful or not.
- t. Failure and replacement caused by contamination of the sealed system such as Green Slime, Dirty Sock Syndrome, etc. Consequential or damage(s) otherwise caused by rust, brownouts, or blackouts. Premature failure due to the use of inferior building material such as Chinese Dry Wall, corrosive conditions caused by location or moisture. Leaks in the equipment in the evaporator, Schrader cores, condenser and/or metering device or other connections resulting from loose valves and/or loose valve caps, interconnecting fittings and/or field piping (line sets/tubing).
- u. Miscellaneous items such as nitrogen that are used to detect or diagnosis failures.
- v. Transit or delivery damage, damage caused by packing, unpacking, assembly, installation, or removal.
- w. You are responsible for all charges as a result of a "no Failure Found" call, which includes, but is not limited to, problems that do not require parts, intermittent issues, blown fuses or circuit breakers that are external of the equipment.
- x. Repairs to alter the equipment to meet changes in federal, state or local codes and regulations, or repairs which require additional parts and labor to bring the equipment into working condition as a result of such Government Regulations.
- y. Products over sixty (60) months of age at the date of Contract purchase.
- z. Manual or digital thermostats and control equipment unless specifically listed on the face of this Contract.
- aa. Any cost recoverable under any other warranty, guarantee, or under an insurance policy (in such case, this Contract will cover any applicable deductible).
- bb. Damage or failure caused by bodily fluids, including by not limited to urine and vomit.
- cc. Product that has been leased or rented to You.
- dd. Products used in a commercial environment, which is defined as non-residential, multiuser, communal, or industrial use.

**16. CANCELLATION.** You may cancel this Contract for any reason during the first thirty (30) days after it is issued and obtain a full refund of the purchase price less any services or claims provided or paid. After the first thirty (30) days, You will receive the lesser of a pro rata refund based on the term remaining on Your Contract OR

ten percent (10%) of the price of this Contract. In either case, the refund will be reduced by the value of any services or claims provided or paid plus any applicable administrative fees.

**17. CLAIMS LIMITATIONS.** The maximum liability owed to You under this Contract will be the lesser of (I) the current market value of a Product of comparable specifications; or, (II) the retail price paid for Your Product minus sales tax and claims paid, in lieu of service repairs or replacement of a Product of comparable specifications. When determining the current market value of a Product of comparable specifications a fair analysis is completed using current manufacturers' and distributors' pricing on comparable products. In the event We (I) replace the Product with a Product of comparable specifications; (II) reimburse You for the current market value of a Product of comparable specifications; or (III) reimburse You for the retail amount of the Product, minus claims, minus sales tax, We shall have satisfied all obligations owed under this Contract and the covered Product becomes the property of Service Net and We may, at Our discretion, require the product to be returned to Us (or Our designee) at Our expense.

**18. BUYOUT.** We may elect, at Our option, to buyout the Contract during the coverage term for the lesser of (I) current market value of a Product with comparable specifications, (II) purchase price of Your Product minus sales tax and claims paid, or at Your request (III) cost of repair in lieu of repair. You have up to forty five (45) days from the date of authorization to complete your product buyout transaction. We will have satisfied all obligations owed under this Contract if any one of the buyout options is accepted by You.

**19. TRANSFERABILITY.** This Contract may be transferred to subsequent owners if the maintenance has been performed as required by the manufacturer. You may transfer this request by sending a) written notice, b) proof of equipment/home acquisition or original owner signature, and c) a twenty-five dollar (\$25) transfer administrative fee to: Service Net, P.O. Box 1411, Jeffersonville, IN 47131-1411. Important Note: This contract does not cover changes or reductions in coverage of the manufacturer or dealer warranty due to transfers of ownership.

**20. STATE VARIATIONS.** Certain states have specific conditions; conditions listed on the front of this form may apply to You.

**21. RIGHT TO RECOVER FROM OTHERS.** If We make any payment, We are entitled to recover what We paid from other parties. By accepting settlement of a claim, You transfer to Us Your right to recovery against any other party.

**22. COVERAGE AND TERM.** This is not an insurance policy. As the Administrator, We will assist You in understanding Your warranty and coverage benefits from the day You purchase Your Contract. Upon inspection and diagnosis, if it is determined that the failure is covered by this Contract, You or the authorized service center must submit an invoice, work order, and/or customer reimbursement for any replacement parts and/or labor for which charges are being made. The invoice MUST show model and serial number(s), the "Contract Number" located on the front side of this form, and the authorized service technician's cost and/or charges. The work order/invoice MUST secure a customer signature as acknowledgement of service and be submitted to Us within sixty (60) days of the date of repair or replacement at Service Net Warranty LLC, 650 Missouri Ave., Jeffersonville, IN 47130 for processing and payment. These documents and/or parts must be made available to Us, upon request, no more than sixty (60) days from the date the claim was received in Our office or on site inspection was made. The Contract is secured by a contractual liability or reimbursement insurance policy provided by Illinois National Insurance Company in all states with the exception of AR, CA, FL, MS, NC, NY, OK, VA, which are covered by New Hampshire Insurance Company Inc., both located at 180 Maiden Lane, 25th Floor, New York, NY 10038. Telephone 1-800-250-3819. If, within sixty (60) days after proof of loss has been filed, We have not paid a covered claim, provided You with a refund, You are otherwise dissatisfied, or We are no longer a going concern, You may make a claim directly to the insurance company. Please enclose a copy of Your Contract when sending correspondence to the insurer.

**23. ENTIRE CONTRACT.** This is the entire Contract and no other written or oral modifications are valid.

**24. LIMITATION OF LIABILITY.** THE DEALER/RETAILER, SERVICE NET, THEIR AGENTS, CONTRACTORS OR LICENSEES WILL NOT UNDER ANY CIRCUMSTANCES BE LIABLE FOR ANY INCIDENTAL OR CONSEQUENTIAL DAMAGES, INCLUDING, BUT NOT LIMITED TO, PROPERTY DAMAGE, LOST TIME, LOST DATA RESULTING FROM THE BREAKDOWN OR FAILURE OF ANY EQUIPMENT OR FROM DELAYS IN SERVICING OR THE INABILITY TO RENDER SERVICE ON ANY COVERED EQUIPMENT. EXCLUSION IS MADE OF ANY IMPLIED WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE. THERE ARE NO EXPRESS OR IMPLIED WARRANTIES MADE HEREIN.

If You have any questions, require customer service, or wish to report a claim, please contact: Service Net Warranty, LLC, 650 Missouri Ave., Jeffersonville, IN 47130.



Agreements may be transferred to subsequent owners if the maintenance has been performed as required by the manufacturer and upon payment of transfer administrative fee and proof of equipment acquisition. All contracts submitted for transfer are subject to approval by Carrier Enterprise. Requests will not be processed if any information is missing from this form. You may be required to submit additional documentation such as a closing document. If authorized, a revised Certificate of Coverage will be printed within thirty (30) days of your request.

*Important Note: The original manufacturer's warranty may not transfer to subsequent owners. Contact the manufacturer of your covered product for more information. Additional "Parts Only" coverage may be available for purchase through your dealer or an authorized dealer.*

Contract Transfer Date: Default (Date request is received by AIG or postmarked via US mail.)

Items in **bold** are required.

### Dealer Information

Dealer Name: \_\_\_\_\_

Dealer ID: \_\_\_\_\_

### New Customer Information

Contract Number: \_\_\_\_\_

Equipment Owner: \_\_\_\_\_ Company Name: \_\_\_\_\_  
(Company Contact) (First) (Last)

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_  
(Required for certificate printing)

Installation Address: \_\_\_\_\_  
(Please confirm the installation address from the original contract)

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

### Transfer Requirements

- I confirm that maintenance has been performed as required by the manufacturer.
- I have included supporting documentation of equipment acquisition such as property closing document or bill of sale or original owner's signature.
- I have included a \$25 Residential Transfer Administrative Fee. Make check payable to **Service Net Warranty** and write **HVAC Transfer [Contract #]** in the memo field.

### Printing Options

- Dealer Receipt Options:**
- E-mail Certificate of Coverage to the dealer e-mail address on record.
  - Mail Certificate of Coverage to the dealer address on record.
  - Does not need new Certificate of Coverage.

- Customer Receipt Options:**
- E-mail Certificate of Coverage to the e-mail address listed in customer information.
  - Mail Certificate of Coverage to the installation address.

New Equipment Owner Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Original Equipment Owner Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(Only required if serving as proof of new ownership)





**Cancel an Existing Contract.** Contracts may be cancelled by the Customer at any time and for any reason. Customers wishing to cancel their contract must initiate the request with their dealer. Refunds are processed to Carrier Enterprise within 30 days. The Dealer is responsible for refunding the customer any due amount. Requests will not be processed if any information is missing from this form.

**Cancel an Existing Contract AND Replace with a New Contract.** Contracts may be cancelled by the Dealer without Customer approval if the Existing Contract has an incorrect Term, Coverage, or Plan. Dealer must notify Carrier Enterprise if a contract needs to be cancelled and rewritten. Refunds are processed to Carrier Enterprise within 30 days. The New Contract MUST meet standard sales guidelines at time of entry by You. The New Contract will be subject to standard wait periods based on the New Contract Purchase Date. The customer will be notified of the Existing Contract's cancellation if the New Contract is not entered within 30 days of the cancellation.

Refunds are processed according to the standard cancellation policy below. Any refund you owe to the customer must also be in compliance with this policy:

- Full refunds, less any claims, will be processed for contracts that are cancelled within 30 days from the Contract Purchase Date
- Prorated refunds, less any claims, will be processed for contracts that are cancelled after 30 days from the Contract Purchase Date

Cancellation Date: \_\_\_\_\_ Default \_\_\_\_\_ (Date cancellation is received by AIG or postmarked via US mail.)

Items in **bold** are required.

### Dealer Information

**Dealer Name:** \_\_\_\_\_ **Dealer ID:** \_\_\_\_\_

**Your Name:** \_\_\_\_\_ **Your Title:** \_\_\_\_\_

How should we communicate with you if additional information is required or if this request should be denied?

E-mail \_\_\_\_\_  Fax \_\_\_\_\_  Mail \_\_\_\_\_

### Customer Information

**Equipment Owner:** \_\_\_\_\_ **Company Name:** \_\_\_\_\_  
(Company Contact) (First) (Last)

**Phone:** \_\_\_\_\_

**Installation Address:** \_\_\_\_\_  
(Please confirm the installation address from the contract)

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip Code:** \_\_\_\_\_

### Cancellation Details

**Contract Number(s) to be Cancelled:** \_\_\_\_\_

- Reason for Cancellation:**
- Customer request: \_\_\_\_\_
  - Dealer Error. New Contract will be re-entered within 30 days of cancellation (select Reason).
    - Wrong Term (i.e. Customer purchased a 10 year plan, but a 5 year plan was originally submitted).
    - Wrong Coverage Type (i.e. Customer purchased labor plus, but labor only was originally submitted).
    - Wrong Plan (i.e. Customer purchased plan 1, but plan 2 was originally submitted).
    - Other (**explanation required**): \_\_\_\_\_

**Customer Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Dealer Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

# HVAC Terminology

## Industry Term -> AIG Term

If there are multiple AIG terms for a particular Industry term, then the Industry term is too vague to provide an accurate AIG term match. Please provide more information in order to correctly identify the product in question. Not all products on this list can be covered by AIG, however if they are, the AIG term would be what the product description would read.

Industry Term	AIG Term
A Coil	Indoor Coil
Air Conditioner (AC)	Condensing Unit AC
Air Handler (AH)	Air Handler Air Handler Mini-Split (used for Mini-Splits)
Air Handler High Velocity	Unico Blower Coil (Lennox Only)
Aquastat	Thermostat
Backflow Preventer	Backflow Preventer
Baseboard Heating	Suspended Unit Heater
Blower Coil	Air Handler
Blower Coil including Heater	Air Handler
Boiler	Boiler
Cased or Uncased Coil	Indoor Coil
Chilled Water Coil	Indoor Coil
Chiller	Chiller
Circulator Pump	Circulator Pump
Coil	Air Handler (Blower Coil) Indoor Coil
Commercial Pump	Circulator Pump
Complete System	Split System
Compressor	Compressor
Condensate Pump	Condensate Pump
Condenser	Condensing Unit AC Cond Unit AC Mini-Split Condensing Unit HP Cond Unit HP Mini-Split Condensing Unit Refrigeration
Condensing Unit	Condensing Unit AC Cond Unit AC Mini-Split Condensing Unit HP Cond Unit HP Mini-Split Condensing Unit Refrigeration
Condensing Unit AC	Condensing Unit AC Cond Unit AC Mini-Split
Condensing Unit HP	Condensing Unit HP Cond Unit HP Mini-Split
Condensing Unit Refrigeration	Condensing Unit Refrigeration
Control Board	Control Panel
Control Panel	Control Panel
Control Product	Control Panel
Cooler Evaporator	Refrigeration Evaporator
Damper	Damper
Damper System	Zone Damper System
Dehumidification System/Package	Dehumidification System/Package
Dehumidifier	Dehumidifier
Desiccant Wheel	Energy Recovery Wheel
Desuper Heater	Desuper Heater
Draft Regulator	Draft Regulator
Dual Fuel iHybrid	Packaged HP/Dual Fuel
Dual Fuel Kit	Dual Fuel Kit
Ductless System	Mini-Split System
DX Coil	Indoor Coil
Economizer	Economizer
Electronic Air Cleaner	Filtration Product
Energy Recovery	Energy Recovery
Energy Recovery Ventilator (ERV)	Energy Recovery Ventilator
Energy Recovery Wheel	Energy Recovery Wheel
Evaporator	Air Handler (Residential) Indoor Coil Refrigeration Evaporator
Evaporator Coil	Indoor Coil
Exhaust Fan	Exhaust Fan
Expansion Tank	Expansion Tank
Evaporative Cooler	Evaporative Cooler <=\$600
Fan	Exhaust Fan Internal Fan Refrigeration Evaporator
Fan Coil	Air Handler
Fan Handler	Air Handler
Filtration Product	Filtration Product
Fireplace	Fireplace
Flow Control	Fractional Flow Control
Flow Control Center	Fractional Flow Control
Fractional Flow Control	Fractional Flow Control
Freq Drive	Variable Frequency Drive
Freezer Evaporator	Refrigeration Evaporator
Fuel Pump	Fuel Pump
Furnace	Furnace
Furnace Electric	Air Handler
Gas Fireplace	Fireplace
Gas Logs	Fireplace
Gas Pack	Packaged AC/GE

Industry Term	AIG Term
Generator	Generator
Geothermal Heat Pump	Geothermal Heat Pump
Geothermal HP System/Package	Geothermal HP System/Package
Heat Exchanger	Heat Exchanger
Heat Pump (HP)	Condensing Unit HP
Heat Pump with Fuel Master	Condensing Unit HP
Heat Recovery	Energy Recovery
Heat Recovery Ventilator (HRV)	Energy Recovery Ventilator
Heat Strips	Heat Strips
Heater	Heater
Hot Water Coil	Indoor Coil
Hot Water Generator	Desuper Heater
Humidifier	Humidifier
Humidistat	Humidistat
Indoor Air Quality Accessory	Filtration Product
Indoor Coil	Indoor Coil
Indoor Unit	Air Handler Furnace
Internal Fan	Internal Fan
IQ Drive	Variable Frequency Drive
Low Ambient Kit	Low Ambient Kit
Low Water Cutoff	Low Water Cutoff
Make-Up Air Unit (MUA)	Make-Up Air Unit
Mini-Split AC	Mini-Split AC
Mini-Split HP	Mini-Split HP
Mini-Split System	Mini-Split System
Mixing Valve	Mixing Valve (less motor)
Non-ducted Heating System	Suspended Unit Heater
Outdoor Unit	Condensing Unit AC Condensing Unit HP Condensing Unit Refrigeration
Package Unit	Package Unit
Packaged AC	Packaged AC
Packaged AC/GE	Packaged AC/GE
Packaged HP	Packaged HP
Packaged HP/Dual Fuel	Packaged HP/Dual Fuel
Packaged Terminal AC Unit (PTAC)	Packaged Terminal AC
Pass Through Air Conditioner	Packaged Terminal AC
Power Exhaust	Exhaust Fan
Pressure Reducing Valve	Pressure Reducing Valve
Programmable Thermostat	Thermostat
PV Panel	Solar Panel
Refrigeration Compressor	Refrigeration Compressor
Refrigeration Condenser	Condensing Unit Refrigeration
Refrigeration Evaporator	Refrigeration Evaporator
Refrigeration System	Refrigeration System
Refrigerator T-stat	Thermostat
Resistance Heat	Heat Strips
Return Fan	Internal Fan
Rooftop Unit (RTU)	Package Unit
Slave Stat	Thermostat
Smoke Detector	Smoke Detector
Solar Heat	Solar Heat
Solar Panel	Solar Panel
Space Heater	Suspended Unit Heater
Spirovent	Spirovent
Split System	Split System
Split System AC	Split System AC
Split System Dual Fuel	Split System Dual Fuel
Split System GE	Split System GE
Split System HP	Split System HP
Storage Tank	Expansion Tank
Strip Heat	Heat Strips
Supply Fan	Internal Fan
Suspended Unit Heater	Suspended Unit Heater
Thermidistat	Thermidistat
Thermostat	Thermostat
Through the Wall Unit	Packaged Terminal AC
Unico Blower Coil	Air Handler
Unit Heater	Suspended Unit Heater
UV Air Purifier	Filtration Product
UV Light	UV Light
Variable Frequency Drive (VFD)	Variable Frequency Drive
Wall-Mounted System	Packaged Terminal AC
Water Heater	Water Heater
Water Source Heat Pump	Geothermal Heat Pump
Zone	Air Handler (Mini-Split) Damper (Zone System)
Zone System	Zone Damper System
Zone Valve	Zone Valve
Zone Damper System	Zone Damper System

The term "Refrigeration" may sometimes be abbreviated as "Refr," pronounced "Reefer".