

Klickitat PUD Residential HVAC Energy Efficiency Program Participation Requirements and Instructions

Thank you for your interest in our Residential HVAC Energy Efficiency Program. We are pleased that we have the opportunity to offer this service to you through our association with Bonneville Power. Because of this collaboration of funds the information we collect from you is required to help determine your eligibility and may also be used to evaluate and audit data about energy use and the conservation program as a whole. With that, your information may be requested for certain site visits to evaluate the performance of the program and is to be kept available for three years. No personal information will be issued to the public.

PROGRAM REQUIREMENTS

All residential HVAC measures must be installed according to KPUD, BPA, and manufacturer standards & specifications and are subject to inspection for the approval process and also subject to quality assurance inspections by a BPA-approved quality assurance inspector.. KPUD reserves the right to make changes to all programs and rebates are subject to the availability of funds through the Energy Efficiency Program.

NOTE TO INSTALLERS: Please contact KPUD’s Energy Services to obtain specifications and requirements as each measure may require special forms and procedures to be followed.

Ductless and Ducted Mini-Split Heat Pumps:

DHP Eligibility (Home Type & Heating Type)

Residential Heating Source	Home Type				
	Single-Family Existing	Single Family-New Construction	Manufactured-Existing	Manufactured-New	Multifamily-All
Electric Forced-Air Furnace	Eligible	Not Eligible	Eligible	Treated as Manufactured-Existing once located on site with proof of occupancy permit	Not Eligible
Ducted Heat Pump	Not Eligible		Not Eligible		
Ductless Mini-Split Heat Pump	Upgrade Only		Upgrade Only		
Zonal (Electric)	Eligible		Eligible		
Wood	Not Eligible		Not Eligible		
Oil/Propane/Gas					
None Existing					

- Additional qualifications may apply. Contact KPUD for measure specific information.

Qualifying Residence & Existing Heating System Requirements: To be eligible, homes type and electric Heating system must be identified above in the DHP Eligibility chart.

Qualifying Specifications:

Ductless heat pumps or ducted mini-splits must be a split-system heat pump employing inverter-driven outdoor compressor, with inverter-driven or variable-speed indoor blower, rated with a minimum of **9.0 HSPF** by the Air Conditioning, Heating, and Refrigeration Institute (AHRI).

Ductless heat pumps or ducted mini-splits must be installed on a dedicated electrical circuit, according to manufacturers’ specifications and the Best Practices for Installing Ductless Heat Pumps Guide and installed by a licensed contractor. Refer to the HVAC installers listed on the KPUD Authorized Contractors list.

Only one ductless heat pump may be claimed per home, regardless of the number of outdoor or indoor units installed, and regardless of the homes square footage.

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Ducted mini-split does not include whole-home centrally ducted systems. Inquire about PTCS heat pump measures for this type of installation. But will allow for configurations with: (1) single or multiple ductless indoor heads; (2) combination of ductless and ducted indoor heads.

Variable Refrigerant Flow (VRF/VRV) technologies **do not qualify**.

Your contractor is responsible for ductless heat pump or ducted mini-splits installations passing BPA approval criteria such as, but not limited to: AHRI certified with proof of AHRI number, warranted by manufacturer against defects in materials and workmanship for a minimum of one year, completion and submission of all required forms to KPUD including the DHP Installation form.

At a minimum, the contractor is to complete and submit the following documents:

- * Detailed equipment invoice
- * Ductless Heat Pump Installation Form
- * AHRI Certificate or other KPUD approved documentation.

Contact Klickitat PUD for complete list of requirements and specifications for installing ductless heat pumps or ducted Mini-Splits as they are subject to change.

Ductless Heat Pump Upgrade Qualifying Specifications:

This measure includes upgrading an existing ductless heat pump for existing single-family and existing manufactured homes to a new ductless heat pump.

In this application the ductless heat pump must be a split system heat pump employing inverter-driven outdoor compressor, with inverter-driven or variable-speed indoor blowers, rated with a minimum of **11.0 HSPF or greater** for single head systems by the Air Conditioning, Heating, and Refrigeration Institute (AHRI)

Ductless heat pumps or ducted mini-splits must be installed on a dedicated electrical circuit, according to manufacturers' specifications and the Best Practices for Installing Ductless Heat Pumps Guide and installed by a licensed contractor. Refer to the HVAC installers listed on the KPUD Authorized Contractors list.

Only one ductless heat pump may be claimed per home, regardless of the number of outdoor or indoor units installed, and regardless of the homes square footage.

Ducted mini-split does not include whole-home centrally ducted systems. Inquire about PTCS heat pump measures for this type of installation.

Variable Refrigerant Flow (VRF/VRV) technologies **do not qualify**.

Your contractor is responsible for ductless heat pump or ducted mini-splits installations passing BPA approval criteria such as, but not limited to: AHRI certified with proof of AHRI number, warranted by manufacturer against defects in materials and workmanship for a minimum of one year, completion and submission of all required forms to KPUD including the DHP Installation form.

At a minimum, the contractor is to complete and submit the following documents:

- * Detailed equipment invoice
- * Ductless Heat Pump Installation Form
- * AHRI Certificate or other KPUD approved documentation.

Contact Klickitat PUD for complete list of requirements and specifications for installing ductless heat pumps or ducted Mini-Splits as they are subject to change.

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Air Source Heat Pumps:

PTCS Air Source Heat Pumps Eligibility (Home Type & Heating Type)

Residential Heating Source	Home Type				
	Single-Family Existing	Single Family-New Construction	Manufactured-Existing	Manufactured-New	Multifamily-All
Electric Forced-Air Furnace	Conversion	Upgrade	Conversion	Treated as Manufactured-Existing once located on site with proof of occupancy permit	Not Eligible
Ducted Heat Pump	Upgrade		Upgrade		
Ductless Mini-Split Heat Pump	Upgrade		Upgrade		
Zonal (Electric)	Upgrade		Upgrade		
Wood	Upgrade		Upgrade		
Oil/Propane/Gas	Upgrade		Upgrade		
None Existing	Upgrade		Upgrade		

- Hydronically heated may be allowed and will be reviewed as to how it is to be classified.
- Additional qualifications may apply. Contact KPUD for measure specific information.

PTCS Air Source and Variable Speed Heat Pumps: Upgrades & Conversions:

Qualifying Residence & Existing Heating System Requirements: To be eligible, homes type and electric Heating system must be identified above in the PTCS Eligibility chart.

Conventional air source heat pump systems operate at two speeds: On and off. A variable speed heat pump differs by operating at the exact speed needed based on the thermostat settings which can result in reduces output capacity and lengthens runs time, which contribute to greater efficiency.

New heat pumps (Upgrades or Conversions) must be rated as having a minimum of 9.0 HSPF and 14 SEER and equipment must be AHRI tested and certified. Manufacturer claims of “equivalent to AHRI certified equipment” will not be accepted. Outdoor compressor must be inverter driven.

All installations must be commissioned and installed according to current PTCS (Performance Tested Comfort Systems) specifications and by a PTCS certified technician. Please reference KPUD’s Authorized Contractor’s List for authorized installers; self-installs will not qualify for rebate.

Variable Refrigerant Flow (VRF/VRV) technologies do not qualify.

Homes with less than 4,500 square feet of heated floor area may qualify for only one heat pump payment. This may be one ducted PTCS or one ductless heat pump, but not both. There are three exceptions to this rule:

1. When the home has two entirely separate duct systems, the home is eligible for two air source heat pump rebates but no more, even if there are more than two duct systems.
2. When the home’s ductwork has not been extended to an addition, a DHP may be installed to service the area of the home that does not contain ducts.
3. Homes with greater than 4,500 square feet of heated floor area may qualify for up to two heat pump measures and no more, provided all other program requirements are met.

Your contractor is responsible for PTCS Air Source and PTCS Variable Speed heat pumps installations passing BPA approval criteria such as, but not limited to: AHRI certified with proof of AHRI number, warranted by manufacturer against defects in materials and workmanship for a minimum of one year, completion and submission of all required forms to KPUD and the PTCS Program including the PTCS Installation form, heat load/loss calculations and associated

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balance point documents. Eligible installations must be entered into the online PTCS registry by the installer and notify KPUD when completed.

At a minimum, the contractor is to complete and submit the following documents:

- * PTCS Project Information Form (KPUD version)
- * AHRI Certificate
- * Approved PTCS registry ID number reflecting APPROVED status.
- * Detailed Invoice showing: Manufacturer, model numbers, cots, date, name of customer, service address...

Contact Klickitat PUD for complete list of requirements and specifications for installing HVAC measures as they are subject to change.

NEW: PTCS Air Source Heat Pump <9.0 HSPF (Commissioning, Controls, and Sizing):

PTCS CCS Eligibility (Home Type & Heating Type)

Residential Heating Source	Home Type				
	Single-Family Existing	Single Family-New Construction	Manufactured-Existing	Manufactured-New	Multifamily-All
Electric Forced-Air Furnace	Eligible	Eligible	Eligible	Treated as Manufactured-Existing once located on site with proof of occupancy permit	Not Eligible
Ducted Heat Pump	Eligible		Eligible		
Ductless Mini-Split Heat Pump	Eligible		Eligible		
Zonal (Electric)	Eligible		Eligible		
Wood	Eligible		Eligible		
Oil/Propane/Gas	Eligible				
None Existing	Eligible				

- Additional qualifications may apply. Contact KPUD for measure specific information.

Qualifying Residence & Existing Heating System Requirements: To be eligible, homes type and electric Heating system must be identified above in the PTCS CCS Eligibility chart.

This measure allows for the installation of new air source heat pumps that are <9.0 HSPF that does not qualify under the standard PTCS air source heat pump measure. The new system must be:

1. Rated as having an HSPF below 9.0 that meets the federal minimum standard
2. AHRI tested and certified; manufacturer claim of “equivalent to AHRI-certified equipment” will not be accepted.
3. All installations must be commissioned and installed according to current PTCS (Performance Tested Comfort Systems) specifications and by a PTCS certified technician. Please reference KPUD’s Authorized Contractor’s List for authorized installers; self-installs will not qualify for rebate.
4. Cannot be claimed in combination with any other heat pump measure.
5. Is only for whole-home centrally ducted systems.

Variable Refrigerant Flow (VRF/VRV) technologies do not qualify.

Homes with less than 4,500 square feet of heated floor area may qualify for only one heat pump payment. This may be one ducted PTCS or one ductless heat pump, but not both. There are three exceptions to this rule:

1. When the home has two entirely separate duct systems, the home is eligible for two air source heat pump rebates but no more, even if there are more than two duct systems.
2. When the home’s ductwork has not been extended to an addition, a DHP may be installed to service the area of the home that does not contain ducts.

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3. Homes with greater than 4,500 square feet of heated floor area may qualify for up to two heat pump measures and no more, provided all other program requirements are met.

Your contractor is responsible for PTCS installations passing BPA approval criteria such as, but not limited to: AHRI certified with proof of AHRI number, warranted by manufacturer against defects in materials and workmanship for a minimum of one year, completion and submission of all required forms to KPUD and the PTCS Program including the PTCS Installation form, heat load/loss calculations and associated balance point documents. Eligible installations must be entered into the online PTCS registry by the installer and notify KPUD when completed.

At a minimum, the contractor is to complete and submit the following documents:

- * PTCS Project Information Form (KPUD version)
- * AHRI Certificate
- * Approved PTCS registry ID number reflecting APPROVED status.
- * Detailed Invoice showing: Manufacturer, model numbers, cots, date, name of customer, service address...

Contact Klickitat PUD for complete list of requirements and specifications for installing HVAC measures as they are subject to change.

Ground-Source Heat Pumps: Contact Klickitat PUD for more detail.

Duct Sealing (PTCS Only):

PTCS Duct Sealing Eligibility (Home Type & Heating Type)

Residential Heating Source	Home Type				
	Single-Family Existing	Single Family-New Construction	Manufactured-Existing	Manufactured-New	Multifamily-All
Electric Forced-Air Furnace	Eligible	Not Eligible	Eligible	Treated as Manufactured-Existing once located on site with proof of occupancy permit	Not Eligible
Ducted Heat Pump	Eligible		Eligible		
Ductless Mini-Split Heat Pump	Eligible*		Eligible*		
Zonal (Electric)	Eligible		Eligible		
Wood	Not Eligible		Not Eligible		
Oil/Propane/Gas					
None Existing					

- With ducts that are connected to electric heat.
- Additional qualifications may apply. Contact KPUD for measure specific information.

Qualifying Residence & Existing Heating System Requirements: To be eligible, homes type and electric Heating system must be identified above in the PTCS Duct Sealing Eligibility chart.

PTCS Duct Sealing Installation Requirements:

PTCS duct sealing is duct sealing with performance testing to determine existing ductwork losses vs. sealed ductwork losses (after fixed).

1. PTCS Duct Sealing must be performed on electric heat systems as shown above.
2. *PTCS Duct Sealing requires a pre-leakage test be conducted prior to sealing and a post-leakage test conducted after sealing.*
3. PTCS Duct Sealing also requires the work be performed by a PTCS Certified technician.
4. PTCS Duct Sealing must be sealed according to the current PTCS Duct Sealing specifications from BPA.

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5. Eligible installations must be entered in the PTCS online site registry.
6. Homes with two independent, approved electrically heat systems may claim up to two Duct Sealing rebates provided all other program requirements are met.

At a minimum, the contractor is to complete and submit the following documents:

- * PTCS Project Information Form (KPUD version)
- * Approved PTCS registry ID number reflecting APPROVED status
- * Detailed Invoice showing: cots, date, name of customer, service address...

Contact Klickitat PUD for complete list of requirements and specifications for installing a heat pumps and duct sealing as they are subject to change and availability.

IMPLEMENTATION PROCESS

Contact our Energy Services Specialist from KPUD at (509) 773-7622 to start the process.

1. Read the Program Participation Requirements and Instructions pages.
2. Complete Residential HVAC Rebate Application.

BID ACCEPTANCE AND INSTALLATION PROCEDURE

1. Customer is to secure bids from installer's listed on the KPUD Authorized Contractors list, or if one is not available they must be bonded and licensed in Washington and they must contact KPUD to be approved. It is suggested that you obtain at least two (2) bids and no bid be accepted unless the premises have been visited and physically inspected by the bidding contractor. It is easier to evaluate submitted bids if each bidder receives the same description of the measures to be installed.
2. Complete any needed contractor required paperwork.
3. If you wish to use KPUD's Conservation Loan Program for your project, please contact our Energy Services department for more information and application as the process is different that stated herein.
4. If you think you may qualify for our Low-Income Program, please contact our Energy Services department for more information and application as the process is different that stated herein.

INSPECTION AND COMPLETION PROCEDURE

1. After the installation of all materials, contact KPUD to schedule an on-site inspection if needed we request that homeowner and/or occupant be present for any inspection.
2. If corrections are needed, KPUD will provide documentation for the installer to clarify changes required comply with installation requirements.
3. If correction were required, another inspection may need to be scheduled.
4. Once all work is complete and approved by you and KPUD and the appropriate BPA Qualifying Agents; KPUD will then process the rebate request for approval if approved and when funds are available.
5. Required paperwork must be submitted for each measure:
 - a. Equipment/contractor invoice showing:
 - *Manufacturer
 - * Model numbers
 - * Type, size, details
 - * Purchase date
 - * Costs
 - b. Measure specific required documentation
 - c. Completed HVAC Rebate Application

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NOTICES AND DISCLAIMERS

Kickbacks, rebates, non-authorized discounting of bids or other non-program benefits from the Contractors are prohibited, and may be subject to federal law.

All materials and installations must comply with current KPUD/BPA conservation specifications in order to be eligible for funding.

Contractors, participating in the program shall not be considered officers, agents or employees of BPA or KPUD; therefore, KPUD shall not be liable for the tortuous acts or omissions of the Contractors or other independent contractors.

All installations are subject to Quality Assurance oversight inspections by BPA approved Inspectors.

Questions about this program can be directed to Klickitat PUD Energy Services

Klickitat PUD
1313 S Columbus Ave
Goldendale, WA 98620
(509) 773-7622 or (800) 548-8357

www.klickitatpud.com

Effective 4/01/2022

All requirements, specifications and rebate values are subject to change and subject to availability of funds

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REBATE VALUES

Klickitat PUD reserves the right to make changes to all programs and rebates are subject to the availability of funds through the Energy Efficiency Program. **See measure specific details herein.**

Measure	Description (existing electric heat unless specified)	Rebate Value
Ductless and Ducted Mini-Split Heat Pumps	Existing Single Family home with electric zonal heat or with electric Forced Air Furnace	\$800
	Existing/New (with occupancy permit) Manufactured home with electric zonal heat or with electric Forced Air Furnace	
Ductless Heat Pump Upgrade only	Replacement of existing ductless heat pump with new ductless heat pump (Existing Single Family & Existing MH)	\$100
Air Source Heat Pumps: UPGRADE	<u>PTCS TESTING & PROCESSES REQUIRED</u> See chart for eligible home and heating type for PTCS Air Source Heat Pumps. Page:3	
	Standard air source heat pump-Upgrade	\$500
	Variable speed air source heat pump-Upgrade	\$700
Air Source Heat Pumps: CONVERSION	<u>PTCS TESTING & PROCESSES REQUIRED</u> See chart for eligible home and heating type for PTCS Air Source Heat Pumps. Page:3	
	Standard air source heat pump-conversion	\$1100
	Variable speed air source heat pump-Conversion	\$1300
Air Source Heat Pumps <9.0 HSPF	<u>PTCS TESTING & PROCESSES REQUIRED</u> See chart for eligible home and heating type for PTCS CCS Heat Pumps. Page: 4	
Ground-Source Heat Pump	Call for details	\$500 up to \$2,500
Duct Sealing (PTCS Only)	Manufactured Homes. See eligibility chart. Page 5	\$200
	Existing Single Family Homes. See eligibility chart. Page 5	\$250
Low-Income	Income Qualified HVAC projects may be available	

All requirements, specifications and rebate values are subject to change and availability of funds

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Effective 4/01/2022

All requirements, specifications and rebate values are subject to change and subject to availability of funds

Residential HVAC Rebate Application Heat Pumps, Ductless Mini-Split Systems, Duct Sealing

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Goldendale, WA 98620

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(509) 773-7622 or (800) 548-8357
aclever@klickpud.com

Customer Name: _____ Account #: _____ Date: _____

Mailing Address: (for rebate check) _____

Installation Address (if different) _____ Phone: _____

Email Address: _____

What project are you applying for? _____

RESIDENCE INFORMATION:

Type of Residence: Existing Single-Family New Construction Single-Family
 Existing Manufactured Home New Manufactured Home w/occupancy Addition
Year home Built: _____ Square Footage _____ Primary Residence: Yes No

Primary heat source: Electric Furnace Electric Heat pump/DHP Electric Zonal
 Gas/Propane Other _____

Water heater fuel source: Electric Gas/Propane

Name of contractor: _____

Rebate payment is to be paid to the OWNER, unless stipulated by signing this authorization: I authorize KPUD to pay me rebate directly to my contractor as named above:

Customer Authorized Signature

By signing below, I certify that the information supplied above is true and accurate to the best of my knowledge and belief and that I have read and comply with the Participation Requirements and Instructions. I acknowledge all projects are subject to quality assurance inspections by BPA and subject to funding availability.

Customer Signature

Date

This Section for KPUD use only

____ PTCS Heat Pump Air Source VSP Ground Source CCS \$ _____

____ Duct Sealing PTCS \$ _____

____ Mini-Split Conversion Upgrade Ducted combo other \$ _____

Supporting Documentation Invoice Install forms PTCS ID AHRI Other _____

Meets rebate requirements? Yes No if so why _____

Approved By: _____ Date _____

Total Approved Rebate \$ _____