

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, 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: \$800 Rebate

DHP Eligibility (Home Type & Heating Type)

Existing 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 (even if failed system)		Not Eligible (even if failed system)		
Ductless Mini-Split Heat Pump	Not Eligible		Not Eligible		
Zonal (Electric)	Eligible		Eligible		
Wood	Not Eligible		Not Eligible		
Oil/Propane/Gas					
None Existing					

- Additional qualifications may apply. Contact KPUD for measure specific information.
- Zonal includes zonal hydronic systems. For electric hydronic upgrades, claim as zonal if heat distribution is through in-floor radiant or wall radiators, and claim as an existing forced-air furnace if distribution is through a duct system.

Qualifying Residence & Existing Heating System Requirements:

To be eligible, homes type and electric Heating system are identified above in the DHP Eligibility chart and additional definitions are below:

- Existing homes conditioned by zonal or forced-air electric-resistance heat as the primary heating source. No other heating sources are eligible. A failed heat pump system operating with electric-resistance back-up heat is not considered electric-resistance for the purposes of meeting pre-condition requirements.
- Single-family residential additions where the primary electric or nonelectric system’s duct work has not been extended to the addition and/or where the current heating source in the addition is electric zonal.

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Participation Requirements and Instructions

Qualifying Specifications:

For the purposes of this measure, DHP equipment types are defined as follows:

- Mini-Split: Systems that have a single outdoor compressor and one or more indoor heads. Multi-head (or multi-zone) systems are considered mini-splits as long as they are served by a single outdoor compressor. Mini-split systems may be ducted or non-ducted.
- Non-ducted: An indoor unit that directly heats or cools air within the conditioned space without attached distribution ductwork. The following types of indoor units are considered non-ducted: Wall-mounted, floor mounted, ceiling-suspended, and ceiling cassette (standard and compact).
- Ducted: An indoor unit that heats or cools air within the conditioned space through the use of distribution ductwork. Though ducted indoor units can be ceiling-suspended, they are typically ceiling-concealed and consist of short duct runs serving multiple zones from the single indoor unit.
- Mixed: A combination of ducted and non-ducted indoor units served by a single outdoor section.
- Heating seasonal performance factor (HSPF2): DHPs or Ducted Mini-Split must be a split-system heat pump employing an inverter-driven outdoor compressor with inverter-driven or variable-speed indoor blower rated with a **7.5 HSPF2** or greater rating that meets federal minimum requirements by the Air Conditioning, Heating, and Refrigeration Institute (AHRI). HSPF2 apply to units manufactured after January 1, 2023 based on DOE's change to the national standard testing methodology. If a unit was manufactured before January 1, 2023, it must meet the equivalent federal minimum efficiency standard for 9 HSPF per the AHRI certificate.
- DHPs must be installed on a dedicated electrical circuit according to the manufacturer's specifications.
- Only one DHP may be claimed per home regardless of the number of outdoor or indoor units installed and regardless of the home's square footage. For homes 4,500 square feet or larger, the home is also eligible for an ASHP incentive.

The Ducted Mini-Split option does not include whole-home centrally ducted systems; see Air Source Heat Pump and Variable Source Heat Pump conversions for further information on whole-home centrally ducted systems.

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 (KPUD Version)
- * 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:

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

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

- Replacing a ducted air-source heat pump that is no longer functioning with a new Variable Speed heat pump would qualify for a variable speed unit upgrade.
- Zonal is including zonal hydronic systems that do not utilize a duct system for distribution
- 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.

CONVERSION: Air Source Heat Pump from electric forced-air furnace Only (NO PTCS Requirement):

\$1200 Rebate

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

Air Source Heat Pump is a compressor-driven electric heating and cooling system that distributes conditioned air through a centralized duct system. An Air Source heat pump is at least twice as efficient as an electric resistance forced-air furnace. KPUD offers rebates for installations that are conversions from an electric forced-air furnace only.

New Air Source heat pumps Conversions must be rated as having a HSPF2 and SEER2 efficiency rating that meets the federal minimum standards according to the AHRI certificate. HSPF2 and SEER2 apply to units manufactured after January 1, 2023 based on DOE’s change to the national standard testing methodology. If a unit was manufactured before January 1, 2023, it must meet the current federal minimum efficiency standards for HDPF and SEER per the AHRI certificate. The current HSPF2 standard is 7.5 and the SEER2 is 13.4 (please note these are subject to change).

AHRI-tested and certified; manufacturer claims of “equivalent to AHRI-certified equipment” will not be accepted.

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

Must be Installed by a licensed contractor.

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 or one ductless heat pump, but not both. There are two 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. In this scenario, the home may be eligible for a ducted air source heat pump and one DHP rebate payment.

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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.

Prescriptive Duct Sealing may be completed and claimed in addition to this rebate, but not required.

This measure is subject to quality assurance inspection by a BPA-approved quality assurance (QA) inspector.

Your contractor is responsible for Air Source 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 program including the Installation form, heat load/loss calculations and associated balance point documents.

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

- * Project Installation Form (KPUD version)
- * AHRI Certificate
- * Detailed Invoice showing: Manufacturer, model numbers, cost, 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.

UPGRADE: Variable Speed Only Air Source Heat Pump (VSP) (NO PTCS Requirement):

\$500 Rebate

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

This UPGRADE rebate is only available for Variable Speed Air Source heat pumps

Variable-speed Air Source heat pump is a compressor-driven electric heating and cooling system that distributes conditioned air through a centralized duct system.

New Variable Speed Air Source heat pumps Upgrades must be rated as having a HSPF2 and SEER2 efficiency rating that meets the federal minimum standards according to the AHRI certificate. HSPF2 and SEER2 apply to units manufactured after January 1, 2023 based on DOE's change to the national standard testing methodology. If a unit was manufactured before January 1, 2023, it must meet the current federal minimum efficiency standards for HDPF and SEER per the AHRI certificate. The current HSPF2 standard is 7.5 and the SEER2 is 13.4 (please note these are subject to change). They also must be:

The outdoor compressor must be *variable-speed, inverter-driven* and documentation must be provided demonstrating that.

AHRI-tested and certified; manufacturer claims of "equivalent to AHRI-certified equipment" will not be accepted.

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

Must be Installed by a licensed contractor.

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 or one ductless heat pump, but not both. There are two 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.

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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. In this scenario, the home may be eligible for a ducted air source heat pump and one DHP rebate payment.

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.

Prescriptive Duct Sealing may be completed and claimed in addition to this rebate, but not required.

This measure is subject to quality assurance inspection by a BPA-approved quality assurance (QA) inspector.

Your contractor is responsible for Air Source 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 program including the Installation form, heat load/loss calculations and associated balance point documents.

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

- * Project Installation Form (KPUD version)
- * AHRI Certificate
- * Detailed Invoice showing: Manufacturer, model numbers, cost, 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 \$500-\$3,000 Rebate.

Contact KPUD for details

Prescriptive Duct Sealing: \$250 Rebate

Prescriptive 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

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

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Prescriptive Duct Sealing Installation Requirements:

Ducts must be connected to electric heat, and must be sealed according to the current Prescriptive Duct Sealing Specification.

Homes with two independent, electrically heated duct systems may claim up to two duct sealing measures provided that all other program requirements are met.

This measure is subject to quality assurance inspection by a BPA-approved quality assurance (QA) inspector.

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

- * Project Installation Form (KPUD version)
- * Detailed Invoice showing: cost, 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 and submit Residential HVAC Rebate Application.

BID ACCEPTANCE AND INSTALLATION PROCEDURE

1. Customer is to secure bids from installer's. A listed of participating Contractors is available through KPUD or at www.comfortreadyhome.com, or if one is not identified on either list. 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. When entering into the contact with your chosen installer, you may need to make them aware of the requirements as contractors are not considered agents of KPUD and we cannot guarantee they keep current with our program requirements.
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 was 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

Klickitat PUD Residential HVAC Energy Efficiency Program Participation Requirements and Instructions

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

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.

Projects may also qualify for a Federal Tax Credit or Washington State Credits due to the Inflation Reduction Act (IRA). KPUD project requirements may differ from those offering requirements. KPUD will attempt to identify those differences as they are made available, however It is the responsibility of the customer to research the credits availability and requirements to qualify for them. Visit www.energystar.gov/about/federal_tax_credits

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 9/1/2023, however still under revision and subject to change

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	See chart for eligible home type and existing heat source	\$800
Air Source Heat Pumps: CONVERSION	Conversion <u>from Electric Forced Air Furnace Only</u> to a Variable Speed or Standard Air Source Heat Pump See chart for eligible home type	\$1,200
Air Source Heat Pumps: UPGRADE	Upgrade is only allowed to a Variable Speed Air Source Heat Pump See chart for eligible home type and existing heat source	\$500
Ground Source Heat Pump	Contact KPUD for details	\$500-\$3,000
Prescriptive Duct Sealing	See chart for eligible home type and existing heat source	\$250
Low-Income	Income Qualified HVAC projects may be available	

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

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

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

**Klickitat PUD Residential HVAC Energy Efficiency Program
Participation Requirements and Instructions
Residential HVAC Rebate Application
Heat Pumps, Ductless Mini-Split Systems, Duct Sealing**

Klickitat PUD
1313 S. Columbus Ave.
Goldendale, WA 98620

www.klickitatpud.com
(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 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 Ductless HP 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.

_____ Date _____

Customer Signature	Date
This Section for KPUD use only	
_____ Heat Pump <input type="checkbox"/> Air Source <input type="checkbox"/> VSP <input type="checkbox"/> Ground Source	\$ _____
<input type="checkbox"/> Conversion <input type="checkbox"/> Upgrade	
_____ Duct Sealing _____	\$ _____
_____ Mini-Split <input type="checkbox"/> Conversion <input type="checkbox"/> Ducted combo <input type="checkbox"/> other	\$ _____
Supporting Documentation <input type="checkbox"/> Invoice <input type="checkbox"/> Install forms <input type="checkbox"/> AHRI Other _____	
Meets rebate requirements? <input type="checkbox"/> Yes <input type="checkbox"/> No if so why _____	
Approved By: _____	Date _____
Total Approved Rebate \$ _____	