

## **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. 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:**

**Qualifying Residence & Existing Heating System Requirements:** To be eligible, homes must have an electric heating system as the primary system and be identified below as a qualifying home type:

1. Existing Single-family residences with zonal electric heat, including electric hydronic systems.
2. Existing Single-family residences with electric forced air furnace, with or without air conditioning.
3. Existing single-family residential additions where the primary electric or nonelectric systems ductwork has not been extended to the addition and/or where the current heating source in the addition is electric zonal.
4. Existing and New Manufactured homes (with occupancy permit) with zonal electric heat.
5. Existing and New Manufactured homes (with occupancy permit) with electric forced air furnaces, with or without air conditioning.
6. New construction Single-family **does not qualify**

#### **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** and listed on BPA's DHP Qualified Product List.

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

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materials and workmanship for a minimum of one year, must be on the BPA DHP Qualified Products List, completion and submission of all required forms to KPUD and the Going Ductless Program including the DHP Installation form.

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:**

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

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 and listed on BPA's DHP Qualified Product List.

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, must be on the BPA DHP Qualified Products List, completion and submission of all required forms to KPUD and the Going Ductless Program 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

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.

### **PTCS Air Source Heat Pumps & PTCS Variable Speed Heat Pumps:**

#### **Qualifying Residence:**

To be eligible, homes must be an Existing and New Manufactured homes (with occupancy permit), Existing Single Family Homes and New Construction Single Family Homes.

#### **Existing Heating System Requirements & Installation options:**

1. PTCS Upgrades from a less efficient heat pump to an air-source heat pump or a variable speed heat pump.
2. PTCS Upgrades from a non-electric heating system (i.e. gas/propane/oil/wood) to an air-source heat pump or a variable speed heat pump.
3. PTCS Upgrades from home without any previously existing primary heat system.

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4. PTCS Upgrades from zonal electric that do not utilize a duct system for distribution to an air-source heat pump or a variable speed heat pump.
5. PTCS Upgrade from ducted mini-split heat pumps with whole-home centrally ducted system.
6. PTCS Upgrade replacing a ductless mini-split heat pump
7. PTCS Conversion from a hydronically heated system with an electric resistance water heat serving a forced air hydronic coil.
8. PTCS Conversions from electric forced air furnace to an air source or a variable speed heat pump.

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 or variable speed.

All installations must be commissioned, installed and a PTCS (Performance Tested Comfort Systems) air flow test must also be performed by a PTCS certified technician. All PTCS installations must meet current PTCS heat pump specification. Please reference KPUD’s Authorized Contractor’s List for authorized installers; self-installs will not qualify for rebate.

The balance point must meet 30 degrees Fahrenheit or lower or it will automatically be rejected.

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 balance point documents. Eligible installations must be entered into the online PTCS registry.

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

- \* Detailed equipment invoice
- \* Appropriate PTCS form
- \* AHRI Certificate
- \* Approved PTCS registry ID number
- \* Heat load/heat loss calculation and associated balancing point worksheet

GROUND SOURCE HEAT PUMP: Contact Klickitat PUD for more detail.

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### **Duct Sealing (PTCS & Prescriptive):**

#### **Qualifying Residence:**

To be eligible, homes must be an Existing and New Manufactured homes (with occupancy permit), or Existing Single Family Homes.

#### **PTCS Duct Sealing: Existing Heating System & installation Requirements.**

1. PTCS Duct Sealing must be performed on electric heat systems with electric forced-air furnace, ducted heat pump, and ductless mini-split heat pump or zonal only.
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.
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.
7. PTCS Duct Sealing is subject to quality assurance inspections by BPA-Approved inspectors.

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

- \* Detailed equipment invoice
- \* Approved PTCS Site registry measure ID #
- \* PTCS Duct Sealing Installation Form

#### **Prescriptive Duct Sealing: Existing Heating System & installation Requirements.**

1. Prescriptive Duct Sealing must be performed on electric heat systems with electric forced-air furnace, ducted heat pump, and ductless mini-split heat pump or zonal only.
2. Prescriptive Duct Sealing also requires the work be performed by an approved Prescriptive Certified technician.
3. Prescriptive Duct Sealing must be sealed according to the current Prescriptive Duct Sealing specifications from BPA.
4. Eligible installations can be entered in the PTCS online site registry.
5. Homes with two independent, approved electrically heat systems may claim up to two Duct Sealing rebates provided all other program requirements are met.
6. Prescriptive Duct Sealing is subject to quality assurance inspections by BPA-Approved inspectors.

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

- \* Detailed equipment invoice
- \* Approved PTCS Site registry measure ID # (optional)
- \* Prescriptive Duct Sealing Installation Form

**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.**

# Klickitat PUD Residential HVAC Energy Efficiency Program Participation Requirements and Instructions

## **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.
2. We request that homeowner and/or occupant be present for the inspection.
3. If corrections are needed, KPUD will provide documentation for the installer to clarify changes required comply with installation requirements.
4. If correction were required, another inspection may need to be scheduled.
5. 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.
6. 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.

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Participation Requirements and Instructions**

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](http://www.klickitatpud.com)

Effective through 9/30/2021 or as funds are available

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

## Klickitat PUD Residential HVAC Energy Efficiency Program Participation Requirements and Instructions

### 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 zonal heat Existing Single Family home with Forced Air Furnace Existing/New (with occupancy permit) Manufactured home with zonal heat Existing/ New (with occupancy permit) Manufactured home with Forced Air Furnace	\$800
Ductless Heat Pump Upgrade	Replacement of existing ductless heat pump with new ductless heat pump (Existing Single Family & Existing MH)	\$100
Air-Source Heat Pumps Manufactured Home(Existing & New (with occupancy) Single Family home (Existing & New Construction)	<u>PTCS TESTING &amp; PROCESSES REQUIRED</u> * From less efficient/non-functioning heat pump * From non-electric heating System (i.e. gas/oil/propane/wood) * From Ductless mini-split heat pump * From electric zonal * From electric forced air furnace	\$500
<b>Variable Speed</b> Air-Source Heat Pumps Manufactured Home(Existing & New (with occupancy) Single Family home (Existing & New Construction)	<u>PTCS TESTING &amp; PROCESSES REQUIRED</u> * From less efficient/non-functioning heat pump * From non-electric heating System (i.e. gas/oil/propane/wood) * From Ductless mini-split heat pump * From electric zonal * From electric forced air furnace	\$1,100
Ground-Source Heat Pump	Call for details	\$500 up to \$2,500
Duct Sealing (PTCS & Prescriptive)	Manufactured Homes Existing Single family Homes	\$200 \$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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# Residential HVAC Rebate Application Heat Pumps (air-source, variable-speed, ground-source), Ductless Heat Pump, Duct Sealing

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

www.klickitatpud.com  
(509) 773-7622 or (800) 548-8357

Customer Name: \_\_\_\_\_ Account #: \_\_\_\_\_ Date: \_\_\_\_\_

Mailing Address: (for rebate check) \_\_\_\_\_

Installation Address (if different) \_\_\_\_\_ Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

**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

Is the primary heat source electric:  Yes                       No: \_\_\_\_\_

Existing electric heating system:  Furnace     Heat pump     VSP Heat Pump  
 Zonal (Baseboard...)     Radiant     Ductless mini-split heat pump     Other \_\_\_\_\_

Is the water heater source electric:  Yes  No

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 below: \_\_\_\_\_

Customer Authorized Signature

Name & Address of  
Contractor:

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

Signature \_\_\_\_\_

Date \_\_\_\_\_

This Section for KPUD use only	
____ PTCS Heat Pump <input type="checkbox"/> Air Source <input type="checkbox"/> Variable Speed <input type="checkbox"/> Ground Source	\$ _____
____ Duct Sealing <input type="checkbox"/> PTCS <input type="checkbox"/> Prescriptive	\$ _____
____ Ductless Heat Pump <input type="checkbox"/> Single head <input type="checkbox"/> Multi-Head <input type="checkbox"/> Upgrade <input type="checkbox"/> Other	\$ _____
Supporting Documentation <input type="checkbox"/> Invoice <input type="checkbox"/> Install forms <input type="checkbox"/> PTCS forms <input type="checkbox"/> Other	_____
Meets rebate requirements? <input type="checkbox"/> Yes <input type="checkbox"/> No if so why _____	
Approved By: _____	Date _____
Total Approved Rebate \$ _____	