



## Heat Pump Incentives

Washington Residents

For work completed on or before December 31, 2018

<b>Heat Pump Incentives</b> Your trade ally or store associate can help you find eligible products and services					
	Heat Pump to 9.0 HSPF Heat Pump Upgrade with Best Practice Installation and Sizing	Federal Standard Heat Pump Conversion with Best Practice Installation and Sizing	9.0 HSPF Heat Pump Conversion with Best Practice Installation and Sizing	Heat Pump Performance Commissioning Controls and Sizing	Ductless Heat Pump
Single Family Customer Incentive	\$200	\$1,000	\$1,500	\$150	\$1,000
Single Family Trade Ally Incentive	\$100	\$300	\$500	\$100	\$300
Manufactured Home Customer Incentive	\$150	\$1,000	\$1,000	\$200	\$1,000
Manufactured Home Trade Ally Incentive	\$100	\$300	\$300	\$50	\$300

<b>Instructions</b> Steps and requirements to earn each incentive	HP Upgrade	HP Conversion	HP CC&S	Ductless HP
<b>1. Ensure the home qualifies</b>				
<ul style="list-style-type: none"> <li>Must be an existing single family or manufactured home; new construction is not eligible for this incentive</li> <li>Gas, oil, wood heating, pellet stoves and propane system conversions do not qualify</li> </ul>	✓	✓	✓	✓
<ul style="list-style-type: none"> <li>Existing multifamily properties are eligible</li> </ul>				✓
<ul style="list-style-type: none"> <li>Previous primary heat source must have been a permanently installed heat pump</li> </ul>	✓			
<ul style="list-style-type: none"> <li>Previous primary heat source must have been a permanently installed electric resistance heating system (electric baseboard, electric furnace, electric ceiling/wall heat)</li> <li>Incentive not offered to customers replacing an existing ducted heat pump</li> </ul>		✓		✓
<ul style="list-style-type: none"> <li>Homes 3,500 square feet or less may qualify for one unit, while homes greater than 3,500 square feet may qualify for two units; homes greater than 3,500 square feet requiring more than two units may apply for additional incentives (additional documentation required, subject to program approval)</li> </ul>	✓	✓	✓	✓
<b>2. Purchase a new qualifying product or service</b>				
<ul style="list-style-type: none"> <li>Equipment must be installed according to specifications outlined in the Washington Technical Specifications Manual available at <a href="http://pacificpower.net/wa-ta-resources">pacificpower.net/wa-ta-resources</a> and <a href="http://pacificpower.net/incentives">pacificpower.net/incentives</a></li> <li>Equipment must be listed on the AHRI Certified Directory: <a href="http://ahridirectory.org">ahridirectory.org</a></li> <li>Work completed must comply with all building codes and standards</li> <li>May apply for only one of these incentives per heat pump</li> </ul>	✓	✓	✓	✓
<ul style="list-style-type: none"> <li>Minimum 9.0 HSPF</li> </ul>	✓			✓
<ul style="list-style-type: none"> <li>Equipment must be a new air-source split or packaged unitary heat pump with an AHRI Standard Rating Cooling Capacity of 65,000 BTU/hr. (5.4 tons) or less</li> <li>New heat pump must be the current primary heat source</li> <li>Must include Best Practice Installation and Sizing</li> </ul>	✓	✓	✓	

<b>Instructions continued</b> Steps and requirements to earn each incentive	HP Upgrade	HP Conversion	HP CC&S	Ductless HP
<b>2. Purchase a new qualifying product or service (continued)</b>				
• Minimum federal standard HSPF		✓	✓	
• Equipment must be a new AHRI rated ductless (mini-split) system				✓
• Must employ an inverter driven outdoor compressor unit and a variable speed fan for indoor blower and be fully ductless				
• Must have at least one indoor head installed in the primary living space				
<b>3. Hire a program-eligible trade ally for all services and tests</b>				
• The trade ally must be on the HVAC Trade Ally List available at <a href="http://pacificpower.net/wa-tradeallies">pacificpower.net/wa-tradeallies</a>	✓	✓	✓	✓
<b>4. Complete and sign this application</b>				
• Homeowner completes section 1	✓	✓	✓	✓
• Trade ally completes section 2				
<b>5. Include an itemized receipt or invoice</b> Itemized receipt/invoice details must clearly show and describe:				
• Product and/or installation costs (materials, labor, service)	✓	✓	✓	✓
• Model numbers: indoor and outdoor				
• Date work initiated				
• Date work completed				
• Trade ally business name				
<b>6. Submit all documents within 90 days of the qualifying service completion date</b> Make copies for your records. Include the following documents:				
• This completed and signed application				
• Itemized receipt or invoice				
• W-9 tax form for any businesses and non-individual customers, including landlords, applying for incentives	✓	✓	✓	✓
• Third Party Payment Addendum (only for homeowners and other third-party entities not listed on account and applying for incentives)				
• AHRI certificate	✓	✓		✓
• Manual J load or equivalent load calculation	✓	✓	✓	

## SECTION 1 - Homeowner completes and submits with section 2

### Incentive Selection

I am applying for these incentive(s):  Heat pump upgrade  Federal standard heat pump conversion  9.0 HSPF heat pump conversion  Heat pump CC&S  Ductless heat pump

### Homeowner and Property Information

Utility account number	-								
Name on utility account									
Address where product was installed						City		State	Zip Code
Address where incentive check should be mailed						City		State	Zip Code
Daytime phone for questions about your application						Email address for questions about your application			
Square footage of home						Year home built			
Home type: <input type="checkbox"/> Single family home <input type="checkbox"/> Manufactured home <input type="checkbox"/> Multifamily <input type="checkbox"/> New construction									

## Homeowner and Property Information Continued

Home's **previous** primary heating source (select one)

- Electric baseboard   
  Electric ceiling or wall heat   
  Electric furnace   
  Natural gas furnace   
  Ductless heat pump  
 Electric ducted heat pump   
  Wood   
  Oil   
  Other \_\_\_\_\_

Home's **current** primary cooling source (select one)

- Central air conditioner   
  Evaporative cooler   
  Electric heat pump (ducted or ductless)   
  None

Is the home's **new** heat pump the primary heating source?     Yes     No

Does home have a secondary heating source? (select one)

- Gas fireplace   
  Wood fireplace   
  Wood stove   
  Pellet stove   
  Other \_\_\_\_\_  
 No secondary heating source

(Optional) I decline to receive additional energy-efficient product incentive information.

How did you hear about cash incentives for energy-efficient products and services for your home? (select all that apply)

- Friend/family   
  Utility website   
  Print ad   
  TV/radio ad   
  Contractor/store staff  
 Other

## Homeowner's Acceptance of Terms

I hereby certify that all information is accurate including claims of customer and equipment information. I confirm that the improvements I installed were not required by code. I understand that information related to the completeness of my application may be shared with contractors. I also understand that the status of my application may be shared with third parties on an aggregated basis. I have read all terms and conditions and acknowledge that Pacific Power may verify all the information provided. Incentive checks are paid to the Pacific Power account holder. Customers are responsible for payment to contractors.

<b>SIGN HERE</b> 	Customer signature	Date
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## SECTION 2 - Trade Ally completes and submits with section 1

### Trade Ally Information

Trade ally completes for all incentives

HP  
Upgrade

HP  
Conversion

HP  
CC&S

Ductless  
HP

Trade ally business name

Mailing address

City

State

Zip Code

Technician's name

Daytime phone number

### Product Information

HP  
Upgrade

HP  
Conversion

HP  
CC&S

Ductless  
HP

Date work initiated

Date work completed

Outdoor unit make

Outdoor unit model number

Outdoor unit serial number

Indoor unit make

Indoor unit model number

Indoor unit serial number

Airflow Information (Complete one of the following options)			HP Upgrade	HP Conversion	HP CC&S	Ductless HP
<b>(Option 1) True Flow Test</b>						
Stage/capacity tested <input type="checkbox"/> High <input type="checkbox"/> Low	Tons tested		Plate installed <input type="checkbox"/> Filter slot @ ID unit <input type="checkbox"/> Filter grille <input type="checkbox"/> Other			
Insert plate size <input type="checkbox"/> 14 <input type="checkbox"/> 20	Plate pressure _____ Pascals					
Normal supply operating pressure NSOP Pascals	Supply pressure with plate in TFSOP Pascals		Correction factor $\sqrt{(\text{NSOP} \div \text{TFSOP})}$			
Raw flow CFM	Corrected flow (Correction factor x Raw flow) CFM		CFM/ton (Corrected flow ÷ Tons tested)			
Does the airflow across the coil meet the minimum 350 CFM/ton requirement? <input type="checkbox"/> Yes <input type="checkbox"/> No						
<b>(Option 2) Static Pressure</b>						
Does indoor unit have an ECM blower? <input type="checkbox"/> Yes <input type="checkbox"/> No						
Return air static WCI	Supply air static WCI		Total static pressure WCI			
Does the equipment meet the program specifications of 350 CFM/ton according to the Static Pressure Air Flow Chart? <input type="checkbox"/> Yes <input type="checkbox"/> No						

Refrigerant Charge Performance Check Run unit for at least 15 minutes before taking readings			HP Upgrade	HP Conversion	HP CC&S	Ductless HP
Mode tested in <input type="checkbox"/> Heating <input type="checkbox"/> Cooling If $\geq 65^\circ\text{F}$ , test in cooling. If $\leq 65^\circ\text{F}$ , test in heating.		Outdoor temperature _____ $^\circ\text{F}$				
<b>(Option 1) Cooling Mode</b> Test when outdoor temperatures are $65^\circ\text{F}$ or warmer. Run unit for at least 15 minutes before taking readings.						
Measured discharge pressure PSIG	Manufacturer's target subcooling found in the equipment's installation manual Min _____ $^\circ\text{F}$ Max _____ $^\circ\text{F}$					
Discharge saturation temperature (A) $^\circ\text{F}$	Measure liquid line temperature (B) $^\circ\text{F}$		Measured subcooling (A-B) $^\circ\text{F}$			
Is measured subcooling within $\pm 3^\circ\text{F}$ of target subcooling or within manufacturer's suggested range? <input type="checkbox"/> Yes <input type="checkbox"/> No						
<b>(Option 2) Heating Mode</b> Test when outdoor temperatures are colder than $65^\circ\text{F}$ . Run unit for at least 15 minutes before taking readings.						
Supply air (SA) $^\circ\text{F}$	Return air (RA) $^\circ\text{F}$		Measured temp split (SA-RA) $^\circ\text{F}$			
Does the temperature either equal or exceed values expected in the Heat Pump Temperature Split Chart? <input type="checkbox"/> Yes <input type="checkbox"/> No						

Controls	HP Upgrade	HP Conversion	HP CC&S	Ductless HP
Was a strip heat lockout control device installed and set $\leq 35^\circ\text{F}$ on the system? <input type="checkbox"/> Yes <input type="checkbox"/> No				

Commission Controls & Sizing	HP Upgrade	HP Conversion	HP CC&S	Ductless HP
What was serviced? <input type="checkbox"/> New heat pump <input type="checkbox"/> Existing heat pump <input type="checkbox"/> Refurbished heat pump				

## Ductless Heat Pump Installation

HP  
Upgrade

HP  
Conversion

HP  
CC&S

Ductless  
HP

Did you install the ductless heat pump in accordance with manufacturer and program specifications, including adherence to proper refrigerant charging and installation of exterior insulated refrigerant lines?  Yes  No

How many head/indoor units does the installed ductless heat pump have?  One  More than one

What is the primary purpose of this ductless heat pump?  
 Primary heat whole home  Supplemental heat for existing room or add-on room

## Trade Ally's Acceptance of Terms

I hereby certify that all information is accurate including claims of customer and equipment information. I have read all terms on this application and acknowledge that Pacific Power may verify all the information provided. Customer personal information and account number will not be shared with contractors or their representatives. The status of customer incentive applications that are missing required information or were not qualified may be shared only with the contractor or their representatives associated with each individual incentive application.



Trade ally signature

Date

## Resources

List of qualifying products and services: [pacificpower.net/wa-qpl](http://pacificpower.net/wa-qpl)

Get your Pacific Power account number: [pacificpower.net](http://pacificpower.net) or 1-888-221-7070

List of program-eligible trade allies: [pacificpower.net/wa-tradeallies](http://pacificpower.net/wa-tradeallies)

Washington Trade Ally Manuals: [pacificpower.net/wa-ta-resources](http://pacificpower.net/wa-ta-resources)

IRS W-9 forms W-9 tax form (for businesses and non-individual customers, including landlords, applying for incentives): [irs.gov/pub/irs-pdf/fw9.pdf](http://irs.gov/pub/irs-pdf/fw9.pdf)

Third Party Payment Addendum (only for homeowners and other third-party entities not listed on account): [pacificpower.net/wa-addendum](http://pacificpower.net/wa-addendum)

Incentives status: Please allow six weeks plus mail service time for delivery. Track your incentive status at [pacificpower.net/wa-track-incentive](http://pacificpower.net/wa-track-incentive). You can also reach us at 1-800-942-0266, M-F, 7 a.m. to 5 p.m. (PST)

**Submit complete applications, receipts and other required documentation to:**

[hes@pacificpower.net](mailto:hes@pacificpower.net)

Subject: WA Heat Pump Application

or

**wattsmart** Homes

WA Heat Pump Application

818 S.W. Third Avenue #215

Portland, OR 97204-2405

## Terms & Conditions

Pacific Power offers incentives through a variety of programs that focus on energy efficient products. When you (the “**Customer**”) participate in these programs, you can save energy and money while reducing your impact on the environment. This application (“**Incentive Application**”) is intended to guide you through the steps necessary to receive an Incentive (“**Incentive**”) under the wattsmart Homes program (“**Program**”). The program is administrated by CLEAResult Consulting Inc., a Texas corporation and/or an affiliate thereof (“**CLEAResult**”). The program may require engaging a qualified trade ally (“**Trade Ally**”) in order to qualify for Incentives. Customer is responsible for paying for all trade ally services.

**Incentive availability:** Incentives are available on a first-come, first-served basis according to the postmark date on the application. Please reference the program website at pacificpower.net/hes to determine the current status of incentive availability. All services must be purchased and installed prior to submitting an Incentive Application. Applications must include all information requested. Failure to provide this information may result in delays. If required information is not provided within 42 days of application submittal, the Incentive Application will be denied. Incentive will not exceed purchase price. Additional terms and conditions may apply. Incentives are subject to tariff approval and may change with 45 days of notice. Please visit pacificpower.net/hes for current program requirements.

**Qualifying customers:** Residential electric customers residing in the state of Washington who purchase their electricity from Pacific Power on rate schedules 16, 17, or 18 qualify. Landlords who own rental properties served by the company in the state of Washington where the tenant is billed on rate schedules 16, 17, or 18 also qualify for this program. You can find your rate schedule on your bill, by calling toll free 1-888-221-7070 or by logging in at pacificpower.net. Incentive checks will be issued in the name of the customer on the qualifying account. If you are a property owner, landlord, property management company or homeowner association and not listed on the account where qualified equipment was installed or services performed you must submit a completed Third Party Payment Addendum to receive incentive check(s) made payable to you.

**Customer responsibilities:** Customer agrees to indemnify and release CLEAResult, and Pacific Power their affiliates, officers and employees from all claims, demands, losses, damages, costs, expenses and liability (legal, contractual or otherwise), which arise from or are in any way connected with any: (1) injury to or death of persons, (2) injury to property of Customer, (3) violation of any applicable laws, statutes or ordinances, or (4) any act omission or negligence of the contractor.

Customer will allow, if requested, a representative from CLEAResult, Pacific Power, or any authorized third party reasonable access to Customer's property for inspections, including but not limited to: (a) post-installation equipment inspection to check implemented measures and to verify compliance with the program requirements; and (b) post-operation inspection to verify energy savings of the measures after a period of operation; and (c) inspection for any other reason.

Customer also consents to CLEAResult's use of Customer's name, program services, and resulting energy savings in reports or other documentation. Customer will obtain the approval of the property owner where the measure is to be installed prior to installation if Customer is not the owner. Customer agrees that information collected in this application may be used for marketing purposes. In addition, Customer acknowledges that information included in this application may be subject to public records requests as required by law.

Customer and CLEAResult shall comply with all applicable laws at all times. It is Customer's responsibility to obtain all licenses, permits or other approvals required for installation of products or measures under the program. Customer is solely responsible for proper disposal of any and all removed products. Customer is solely responsible for the economic and technical feasibility, operational capability and reliability of Customer's installations, products and solutions. CLEAResult and Pacific Power make no representation or warranty and assume no liability with respect to services of any trade ally, quality, safety, performance or other aspect of any design, system or appliance installed pursuant to the program or this Incentive Application and expressly disclaim any such representation, warranty or liability. Under no circumstances shall CLEAResult or Pacific Power be liable for any monetary damages related to the program including any action or inaction of trade allies performing work under the program. All projected savings are intended to be estimates and CLEAResult and Pacific Power do not guarantee any level of savings. The customer hereby transfers to Pacific Power all environmental attributes (“**Environmental Attributes**”) attributable to program qualifying equipment or its operation. Environmental Attributes include any and all credits, benefits, emissions reductions, offsets and allowances, howsoever entitled, resulting from the avoidance of the emission of any substance to the air, soil or water at or by PacifiCorp generating facilities through reduced generation of energy or other savings or offsets on account of the qualifying equipment. The customer will not claim ownership of any Environmental Attributes. As long as the customer at the same time states the qualifying equipment was made possible with funding from Pacific Power, the customer may claim that it is facilitating the production of the Environmental Attributes attributable to the qualifying equipment.

**Jury waiver:** To the fullest extent permitted by law, each of the parties hereto waives any right it may have to a trial by jury in respect of litigation directly or indirectly arising out of, under or in connection with this agreement. Each party further waives any right to consolidate any action in which a jury trial has been waived with any other action in which a jury trial cannot be or has not been waived.

**Application timeline:** Incentive Application and required documents must be postmarked within 90 days of service completion date. Incentive checks are issued within 45 days of receipt of the completed and approved Incentive Application. Incentives are not to exceed the purchase price of the equipment or service. Equipment and service work may be inspected for compliance. Incentives are subject to tariff approval and may change with 45 days' notice. Additional terms and conditions may apply.

**Application details:** If your Incentive Application is selected for inspection, it will not be processed until the review is satisfactorily completed. Pacific Power issues incentives in the form of checks not utility bill credits. Pacific Power is not responsible if your trade ally provides inaccurate information about the amount and/or conditions of the actual incentive and Pacific Power will not pay incentives for equipment that is mislabeled or misrepresented by trade allies regarding incentive qualifications. Households receiving incentives under the wattsmart Homes program may not receive equipment purchase and installation incentives under other Pacific Power company programs.

By providing Pacific Power with your e-mail address you agree that we may send you e-mails, occasional “breaking news” alerts and promotions from Pacific Power's wattsmart Homes program. We may also e-mail you occasionally with updates and information about the program. Should we elect to change our privacy policy we will post the changes at pacificpower.net/hes. Where the changes are significant, we may also choose to e-mail all our registered users with the new policy details.

Incentive Application must be submitted within 90 days of the service completion date.