



## Eugene Water & Electric Board

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# Ducted Heat Pump Program Step by Step Instructions for Contractors

For questions regarding these instructions or required paperwork, please contact the assigned EWEB Energy Management Specialist or the Ducted Heat Pump program lead at 541-685-7000.

Participating contractors can find all the resources needed for our residential ducted heat pump program here: <http://www.eweb.org/contractors-and-developers/participate-as-a-contractor/ducted-heat-pump-program>.

Resources for customers can be found here: <http://www.eweb.org/residential-customers/rebates-loans-and-conservation/ducted-heat-pumps>.

**The following documents must be received by EWEB before an EWEB Energy Management Specialist will be assigned to any project:**

- A **complete** Energy Management Services Program Application
- A **complete** loan application, if the customer is applying for a zero-interest loan from EWEB. Due to privacy requirements, EWEB can only accept the loan application from the customer.

When an EWEB customer's project has been assigned, the assigned Energy Management Specialist will notify the customer in writing that they have been either approved or denied participation in the program. If necessary, the Energy Management Specialist may schedule a site visit with the customer.

**When the customer has decided to have a system installed, the contractor will:**

- Arrange for the installation of qualifying equipment with the required warranty. Heat pumps must be split-system air source heat pumps with a compressor and air handler that are both new and rated with minimum performance standards of 9.0 HSPF / 14 SEER. The system shall be warranted by the manufacturer against defects in material and workmanship for a minimum of 5 years from the date of equipment start-up. Warranties shall cover parts and labor. This warranty information shall be listed on the customer's proposal / contract.
- Install the system according to all terms of the contractor's agreements with the customer, according to the manufacturer's installation instructions and warranty requirements, and according to the EWEB specifications. For full text of the ducted heat pump installation requirements, see above resources link.
- Include a carbon monoxide (CO) detector when combustion appliances are located within a conditioned space or attached structure (i.e. garage). A UL listed CO detector shall be provided and installed per Performance Tested Comfort Systems Standards (PTCS™) and Testing Procedures.
- Secure all permits, including (but not limited to) mechanical and electrical permits, arrange for all required permit inspections, and obtain final permit approvals.
- For systems with electric supplemental heat (i.e., electric strip heat), it shall be staged at 30 degrees F and **locked out above 30 degrees F** (except when supplemental heating is required during a defrost cycle or when emergency heating is required during a refrigeration cycle failure). **Digital thermostats shall be used for the supplemental heat lockout; no mechanical lockout thermostats are allowed.** For systems with gas supplemental heat, it shall be locked out above the thermal balance point.
- All new heat pump systems shall be tested using **the appropriate Proctor Engineering Group (PEG) CheckMe!® summer or winter protocol or PTCS commissioning protocols.** Specifically, the HVAC contractor shall test air flow, follow auxiliary heater control requirements, and ensure correct refrigerant charge.
- All duct systems shall meet the PTCS Duct Sealing standards. PTCS technicians shall be certified to perform either the Prescriptive Duct Sealing measures or the Performance Tested Comfort systems measures. Note: If technician is NOT using the Prescriptive duct sealing protocol, then a duct leakage test is required with test-only or both pre- and post-sealing duct leakage values documented on the PTCS Duct Sealing Form.

**The contractor will submit to EWEB the following for payment processing, after the system has been installed:**

- Documentation of how equipment sizing and selection was determined, including either:
  1. A PTCS Heat Pump Sizing Calculator, using observed and documented house characteristics. Balance point input must be 30F or less. Calculator can be found at: <https://ptcs.bpa.gov/SupportMaterials.aspx>  
OR
  2. Both of the following:
    - o A Heat Load/Heat Loss calculation, based on ACCA's Manual J, using observed and documented house characteristics, AND
    - o A Balance chart worksheet showing a balance point of 30F or less
- AHRI Certificate of Performance. All split-system air source heat pumps shall meet the following minimum performance standards: 9.0 HSPF / 14 SEER as certified by AHRI.
- Itemized customer invoice(s) for the ducted heat pump system and insulation (if applicable).
- Completed EWEB Ducted Heat Pump Program System completion Form.
- Completed CheckMe! Or PTCS Commissioning Data Entry Form.
- Completed PTCS Duct Sealing Form. A copy of the PTCS Duct Sealing Form shall be faxed to BPA at 877-848-4074 or completed online at <https://ptcs.bpa.gov>.
- Completed EWEB Contractor Invoice Summary, Exhibit F if insulation measures are installed.

**After receipt of necessary documentation, EWEB will:**

1. Attempt to schedule a heat pump final verification within 48 hours of receiving the final documentation from a contractor. If the verification requires an in-person visit to the customer's home, contractors may be requested to schedule a technician to be available during the visit to potentially alleviate a contractor callback for non-compliance.
2. Communicate with the contractor's representative about any scheduling issues between EWEB and the customer in situations where the final verification cannot be scheduled within seven business days.
3. E-mail or fax to the contractor's representative the details pertaining to any final verification. It is the responsibility of the contractor to remedy any issues in a timely manner and to notify the Energy Management Specialist once the job is ready for a re-inspection.
4. Authorize payment of any funds for which the customer has been approved, upon successful project completion.