

# Energy Trust of Oregon

## Heat Pump Tune-Up Program Fact Sheet

### **Program Features:**

CheckMe!<sup>®</sup> diagnostic test for qualifying heat pumps are provided at no charge to Energy Trust of Oregon (Energy Trust) participants.

Outdoor “Lockout” Thermostat (ODT) installation and electric strip heat rewiring provided at no charge to Energy Trust participants.

CheckMe!<sup>®</sup> Duct verification provided at no charge.

### **Roles:**

- Proctor Engineering Group (PEG) provides CheckMe!<sup>®</sup> heat pump test data verification, unit certification, technician training, technical support, and reporting services.
- Participating Home Energy Savings trade ally contractors who are certified by PEG for Heat Pump CheckMe!<sup>®</sup> perform heat pump diagnostic testing and repairs.
- Conservation Services Group (CSG) screens qualified participants, provides consumer education and marketing, commissions companies to deliver program benefits, and administers payments to trade ally firms and PEG (PEG) for services rendered per this document.
- CSG serves as primary contact for any technical questions over and above those pertaining to individual CheckMe!<sup>®</sup> runs
- Energy Trust funds program via service incentive dollars allocated to Home Energy Savings per Payment section.

### **Target Market / Participant Qualifications:**

Oregon customers of Portland General Electric and Pacific Power are eligible to receive benefits of this program.

New and existing heat pumps are eligible for program benefits, except for ENERGY STAR<sup>®</sup>-labeled units.

Only heat pumps with electric resistance (“strip”) backup heat will be served by the Heat Pump Tune-Up program. “Hybrid” or “dual-fuel” systems will not be allowed.

Older heat pumps that do not have an existing ODT are the primary targets for this program.

Contractors will initially be allowed to select customers for Heat Pump Tune-Up program benefits. Limitations to this may be specified and imposed by CSG during the course of the program’s administration, including quotas and/or a mandatory participant list.

Home Energy Savings will identify potential participants for Heat Pump Tune-Up program, and will perform outreach to educate these about the program via direct mail. Incoming participant inquiries will be referred to the trade ally list on the Energy Trust web site that lists participating CheckMe!<sup>®</sup> certified contractors.

## **Program Term:**

Heat Pump Tune-Up program benefits are available between September 10, 2006 and February 31, 2007.

## **Program Procedures**

### **Initiation**

Trade ally contractor completes Heat Pump CheckMe!<sup>®</sup> “winter protocol” training.

CSG executes agreement with trade ally contractor to provide services for Heat Pump Tune-Up program.

CSG provides trade ally contractor with consumer educational materials that describe Heat Pump CheckMe!<sup>®</sup> and the Heat Pump Tune-Up program.

### **Delivery**

Contractor performs CheckMe!<sup>®</sup> testing and services described in Program Features section to qualified Energy Trust participants at no charge.

Contractor completes the following forms and submits to CSG upon heat pump CheckMe!<sup>®</sup> passage and completion work described in Program Features section:

- Form 300U (site details and utility account #)
- Form 300T (signature page)
- CheckMe!<sup>®</sup> data input sheet

Upon passage of Heat Pump CheckMe!<sup>®</sup> test, participant is issued a CheckMe!<sup>®</sup> certificate by mail from PEG, indicating that their heat pump has passed the CheckMe!<sup>®</sup> diagnostic.

PEG will provide regular reporting of CheckMe!<sup>®</sup> results to CSG.

contractors certified by the Oregon Department of Energy to offer duct leakage testing and sealing services will report their duct testing data to PEG via the CheckMe!<sup>®</sup> Duct feature of the Heat Pump Tune-Up program. CheckMe!<sup>®</sup> Duct provides a “pass or fail” result and a completion certificate to. Energy Trust will reimburse PEG for the cost of the CheckMe!<sup>®</sup> Duct run, as described in the Payments section. Home Energy Savings participant incentives for duct leakage testing and duct sealing apply as normal.

### **Payments (refers to each project)**

- ETO pays \$50 to contractor for completing a CheckMe!<sup>®</sup> diagnostic test, provided the heat pump receives is passes. Heat pump repair costs are not covered by the Heat Pump Tune-Up program; contractor is responsible for recovering cost of these services.
- ETO pays \$170 to contractor for Outdoor “lockout” Thermostat (with temperature set at 35°F) installation and strip heat rewiring (to stage 2) performed during the course of a CheckMe!<sup>®</sup> run.
- ETO pays \$55 to PEG for CheckMe!<sup>®</sup> run.
- ETO pays \$25 to PEG for CheckMe!<sup>®</sup> Duct run if duct sealing is performed to minimum Home Energy Savings standards (50 CFM<sup>50</sup> leakage reduction)
- Heat pump repair costs associated with passing Heat Pump CheckMe!<sup>®</sup> may be eligible for ODOE Residential Energy Tax Credit.

CSG will enter participant and testing information provided on forms described in Delivery by contractors in to Goldmine and FastTrack. Payment for services rendered (as listed above) will be assessed to contractors and PEG when reporting from contractors and PEG has been verified and approved by CSG.

Home Energy Savings incentives for duct leakage testing and duct sealing will be paid to participants, per Home Energy Savings incentive amounts specified at the time the work is performed.

## **Restrictions**

ENERGY STAR® labeled heat pumps will not qualify for the no-cost services provided by the Heat Pump Tune-Up program.

Heat pumps treated under the Heat Pump Tune-Up program must pass the CheckMe!® diagnostic prior to receiving payment for any services provided by this program. Contractor is responsible for any costs not covered by the Heat Pump Tune-Up program. Contractor is responsible for any costs described in Payments for heat pumps that do not pass CheckMe!® diagnostic test.

Contractors must execute an agreement with Conservation Services Group in order to participate in the Heat Pump Tune-Up program and receive payment for services described in Payments.

As with all Energy Trust incentive programs, Heat Pump Tune-Up program benefits availability is subject to available funding.

Additional restrictions may apply.

## **Program Contacts**

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