

# Implementation Manual Updates: October, 2014

## Programmatic Changes





# Commercial Sector

Presenter: John Wilson



# Commercial Sector

## Effective Immediately

**Correction:** In the commercial custom projects section, the restriction that custom projects not include deemed measures was removed to reflect the custom project policy change that custom projects can be deemed measures.

**Rationale:** This policy change (allowing any measure or calculated project to be submitted as custom) was made in April but not fully described or represented in the Manual until now.

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**Change:** Commercial shell insulation measures were added.

**Rationale:** These measures were made available through the RTF and BPA Qualified paths.



# Commercial Sector

## Effective Immediately

**Correction:** The requirements for deemed refrigeration measures will now be housed solely in the Interim Reference Deemed Measure list (in the Document Library) rather than in the Deemed Refrigeration Retrofit Measures – Payment summary (which has been removed from the document library).

**Rationale:** This change removes unnecessary redundancy.

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**Correction:** In the Unitary Air Conditioning Equipment in Commercial Buildings section, the custom project submittal requirements were removed.

**Rationale:** This policy change (allowing any measure or calculated project to be submitted as custom) was made in April but not fully described or represented in the Manual until now.



# Commercial Sector

## Effective Immediately

**Correction:** In the Unitary Air Conditioning Equipment in Commercial Buildings section, the custom project submittal requirements were removed.

**Rationale:** This policy change (allowing any measure or calculated project to be submitted as custom) was made in April but not fully described or represented in the Manual until now.

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**Correction:** In the Heat Pump Equipment Conversion and Upgrade in Commercial Buildings section, the custom project submittal requirements were removed.

**Rationale:** This policy change (allowing any measure or calculated project to be submitted as custom) was made in April but not fully described or represented in the Manual until now.



# Commercial Sector

## Effective Immediately

**Change:** The Non-residential Lighting Program has introduced program promotions.

**Rationale:** This was requested by several customers.



# Commercial Sector

**Effective April 1, 2015**

**Change:** Numerous changes to the deemed refrigeration measures will take effect.

**Rationale:** RTF changes prompted numerous expirations, re-introductions, and revisions to the deemed refrigeration measures.

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**Change:** Delivery mechanisms for pre-rinse Spray Wash Valves will be consolidated to Direct Install only. Documentation requirements capturing end user request, mailing documentation, site address and water heater fuel do not change.

**Rationale:** BPA has consolidated measure delivery mechanisms for simplification.



# Commercial Sector

**Effective April 1, 2015**

**Change:** Delivery mechanisms for Showerheads will be consolidated to Direct Install and By Request (includes Mail by Request, Over the Counter and Other Distribution Methods). Documentation requirements capturing end user request, mailing documentation, site address and water heater fuel do not change.

**Rationale:** BPA has consolidated measure delivery mechanisms for simplification.





# Agricultural Sector

Presenter: Tom Osborne



# Agricultural Sector

## Effective Immediately

**Correction:** In the Irrigation System Upgrades, payment section's Sprinkler Equipment table, footnote references were added to indicate that lateral moves are also included to the following measures:

- New multiple configuration nozzles for low-pressure pivot sprinklers
- New goose-neck elbow for new drop tubes (to convert existing sprinkler equipment mounted on top of the pivot to low-pressure sprinkler package)
- Also the phrase “Cut and pipe press repair of leaking hand lines, wheel-lines and portable mainline” was changed to “Pipe pair of leaking hand lines, wheel-lines and portable mainline.”

**Rationale:** These edits clarify and simplify some of the measure descriptions for sprinkler equipment.



# Agricultural Sector

## Effective Immediately

**Correction:** In the Variable Frequency Drives in Agricultural Turbine Pump Applications section, custom project criteria has been removed.

**Rationale:** This policy change (allowing any measure or calculated project to be submitted as custom) was made in April but not fully described or represented in the Manual until now.

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**Correction:** In the Transformer De-energization section, the reference to custom project documentation requirements was removed from the documentation requirements section.

**Rationale:** Previously, this measure was submitted as a custom project, and this reference was inadvertently left in place after conversion to a deemed measure.



## Industrial Sector

Presenter: Steve Brooks



# Industrial Sector

## Effective Immediately

**Change:** BPA review of Track and Tune Performance Tracking System Design Proposals is optional.

**Rationale:** This eliminates customer submission without savings or payment. Customers have the option for BPA review as implemented in the Track and Tune Calculator.

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**Correction:** The High Performance Energy Management and Track and Tune Projects sections (optional energy management pilot components) were consolidated, and the completion report and supporting invoices were added to the documentation requirements table.

**Rationale:** This consolidation simplifies the requirements and allows a comparison across components.



# Industrial Sector

## Effective Immediately

**Correction:** In the Variable Frequency Drives for Fans in Spud and Onion Storage Facilities section, the custom project submittal requirements were removed.

**Rationale:** This policy change (allowing any measure or calculated project to be submitted as custom) was made in April but not fully described or represented in the Manual until now.



# Industrial Sector

## Effective April 1, 2015

**Change:** Customers participating in the Energy Smart Industrial Energy Management pilot must upload documents to the ESI SharePoint site and submit links to that documentation by e-mail to [eedocs@bpa.gov](mailto:eedocs@bpa.gov). Until then, submitting the link is optional.

**Rationale:** BPA will require links be shared for Energy Management data, program files and other project-specific information. This change increases information protection and brings greater efficiencies to the process of review and approval by BPA.

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**Change:** Savings will increase for Variable Frequency Drives for Fans in Spud and Onion Storage Facilities.

**Rationale:** These changes were recommended by the RTF and accepted by BPA.



## Residential Sector

Presenter: Sarah Fielding Moore





# Residential Sector

## Effective Immediately

**Change:** Advanced Power Strips distributed “Over-the-Counter” may be reported using the Mail by Request reference number until April 1, 2015, at which point customers must use the “By Request” reference number.

**Rationale:** This provides temporary guidance until the new measure distribution methods are available.

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**Correction:** The following was removed from the clothes washer requirements: “Clothes Washers must have a Modified Energy Factor (MEF) of 2.0 or greater and a Water Factor of 6.0 or lower.”

**Rationale:** The current Requirements and Specifications require Clothes Washers to be ENERGY STAR qualified. The ENERGY STAR specification for Clothes Washers has been updated.



# Residential Sector

## Effective Immediately

**Change:** In the Ductless Heat Pumps section, the following sentences have been added: Homes where plug-in electric space heaters are the primary heating system in the home qualify for BPA DHP payment.

**Rationale:** Savings from homes with plug-in electric space heaters as a primary heating system is consistent with savings for homes with zonal electric heat.

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**Change:** A new measure was added for Ductless Heat Pumps – Manufactured Homes with Zonal electric heat for both standard and low income.

**Rationale:** This measure is now available to customers.



# Residential Sector

## Effective Immediately

**Change:** HVAC technicians may now install PTCS measures if they are certified in an approved PTCS alternative as listed in the PTCS Program Requirements.

**Rationale:** The PTCS Program Requirements were updated to accept additional HVAC technical certifications.

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**Change:** Prescriptive duct sealing measures were added to Ducted Systems.

**Rationale:** These measures are now available.



# Residential Sector

## Effective Immediately

**Change:** In the Ducted Systems with PTCS Heat Pump Upgrades and Conversions section, the following sentence was deleted: When more than 50% of the heating ducts run through unconditioned space, ducts must be sealed and PTCS certified unless the ducts were previously certified or a PTCS duct leakage test indicates that the pre-existing duct leakage is too low to qualify for the PTCS duct sealing reimbursement.

**Rationale:** PTCS heat pump and duct sealing measures have been decoupled. Duct sealing is no longer required.

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**Correction:** In the Ducted Systems with PTCS section, the following sentence was deleted: “Hydronically heated homes are considered to have “ducts not required” for payment purposes, as no ducts exist, and new ducts are not eligible in existing homes.

**Rationale:** This revision removed unnecessary information, as ducts are no longer required.



# Residential Sector

## Effective Immediately

**Correction:** In the Ducted Systems with PTCS section, both air source and variable speed heat pumps must be installed according to the PTCS Air Source Heat Pump Installation Specification.

**Rationale:** Variable speed heat pumps are considered the equivalent of air source heat pumps under PTCS requirements.

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**Correction:** In the Ducted Systems with PTCS section, a change was made to clarify primary heating system eligibility by application by providing specific guidance in the PTCS measure table.

**Rationale:** PTCS measures have specific HVAC baseline requirements. This information has been clarified.



# Residential Sector

## Effective Immediately

**Correction:** Weatherization eligibility requirement for electrically heated homes was corrected. The announcement expanding the definition of electrically heated homes inadvertently removed the definition for electrically heated homes with an electric heating system as the primary system.

**Rationale:** This omission has been corrected.

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**Change:** The open cavity wall insulation minimum requirement is reduced from R-15 to R-13.

**Rationale:** In many parts of the Northwest, R-15 insulation is not available.



# Residential Sector

## Effective Immediately

**Correction:** In the Prime Window and Patio Door section, the documentation requirements were revised to indicate that the original window or patio door and frame must be included in the audit/field notes rather than contained solely in a description.

**Rationale:** These revisions were undertaken to make field notes on existing condition more consistent across all Weatherization measures.

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**Change:** An exception for the Whole-House Air Sealing house age limit was added. Whole-House Air Sealing is limited to homes built before 1982 unless a pre-test measures the house leakage at greater than nine air changes per hour at 50 Pascals.

**Rationale:** This exception expands eligibility.



# Residential Sector

## Effective Immediately

**Change:** A new measure was added for Prescriptive Air Sealing.

**Rationale:** This measure is now available.

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**Correction:** Low-income measures must follow the Specification, Requirements and Documentation requirements as listed under the corresponding standard sections (i.e., non low-income versions).

**Rationale:** New language was added to clarify these requirements.





# Residential Sector

## Effective Immediately

**Change:** A new measure has been added for Prescriptive Air Sealing for Low Income single-family homes.

**Rationale:** This measure is now available.

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**Change:** A new measure has been added for Prescriptive Duct Sealing for Low Income single-family homes.

**Rationale:** This measure is now available.

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**Change:** A new measure has been added for Ductless Heat Pumps for Low Income Manufactured Homes with zonal electric heat.

**Rationale:** This measure is now available.



# Residential Sector

## Effective April 1, 2015

**Change:** Current CFL lighting measures will be expired and replaced.

**Rationale:** These measures were updated and consolidated by the RTF. BPA has accepted the RTF recommendations.

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**Change:** Delivery mechanisms for CFL bulb and fixture measures will be consolidated and reduced to four categories: Retail, Direct Install, By Request (includes Mail by Request, Over the counter and Other Distribution Methods) and Mailed Non-Request (bulbs only). CFL measures being consolidated into the "By Request" category have the same savings and payment amounts. Documentation requirements capturing end user request, mailing documentation and/or limits to number of Mailed Non-Request bulbs do not change.

**Rationale:** BPA has consolidated measure delivery mechanisms for simplification.



# Residential Sector

## Effective April 1, 2015

**Change:** The BPA payment for CFL general purpose bulbs will be reduced (and the name will change from “standard twister” to “general purpose bulb”).

**Rationale:** Measure implementation costs have decreased, and payment has been adjusted accordingly. The change in name reflects an update in RTF measure taxonomy.

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**Change:** Current LED lighting measures will be expired and replaced.

**Rationale:** These measures were updated and consolidated by the RTF. BPA has accepted the RTF recommendations.



# Residential Sector

## Effective April 1, 2015

**Change:** Delivery mechanisms for LED bulbs will be consolidated and reduced to four categories: Retail, Direct Install, By Request (includes Mail by Request, Over the Counter and Other Distribution Methods) and Mailed Non-Request (bulbs only). LED bulb measures being consolidated into the “By Request” category have the same savings and payment amounts. Documentation requirements capturing end user request, mailing documentation and/or limits to number of Mailed Non-Request bulbs do not change.

**Rationale:** BPA has consolidated measure delivery mechanisms for simplification.



# Residential Sector

## Effective April 1, 2015

**Change:** Delivery mechanisms for Showerheads will be consolidated and reduced to three categories: Retail, Direct Install, and By Request (includes Mail by Request, Over the Counter and Other Distribution Methods).

Showerhead measures being consolidated into the “By Request” category have the same savings and payment amounts. Documentation requirements capturing end user request, mailing documentation, site address and water heater fuel do not change.

**Rationale:** BPA has consolidated measure delivery mechanisms for simplification.

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**Change:** A new documentation requirement was added to the Simple Steps section: customers must now retain the Simple Steps invoice.

**Rationale:** This documentation requirement was requested by COTRs to assist in their oversight role.



# Residential Sector

## Effective April 1, 2015

**Change:** Delivery mechanisms for Advanced Power Strips will be consolidated to three categories: Retail, Direct Install and By Request (includes Mail by Request, Over the Counter and Other Distribution Methods). Advanced Power Strip measures being consolidated into the “By Request” category have the same savings and payment amounts. Documentation requirements capturing end user request and mailing documentation do not change.

**Rationale:** BPA has consolidated measure delivery mechanisms for simplification.

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**Change:** The Advanced Power Strip measure will include a requirement for customers to send and collect a short survey (mailed or emailed) to all end users who received an Advanced Power Strip.

**Rationale:** This measure was deemed a Planning measure by the RTF, requiring additional research to verify the savings for this measure.



# Residential Sector

## Effective April 1, 2015

**Change:** BPA will no longer provide payment for AirGenerate and Electrolux Heat Pump Water Heaters which were removed from the HPWH Qualified Product list.

**Rationale:** BPA requires HPWHs to be listed on the HPWH Qualified Product list but has decided to make an exception in this instance and allow these two products that have already been removed from the list, until April 1, 2015.

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**Change:** PTCS heat pump measures with “ducts required” or “with duct sealing” will no longer be available. PTCS heat pump measures with “ducts required” have been renamed to heat pumps “with duct sealing”

**Rationale:** Heat pump and duct sealing measures are now offered as individual measures and duct sealing is now optional. These measures were not noticed previously, and expiring them represents a change in payment.



# Residential Sector

## Effective April 1, 2015

**Change:** PTCS Commissioning, Controls and Sizing measures will be combined, eliminating the differentiation between new manufactured homes and existing manufactured homes. The measures currently labeled in the Interim Reference Deemed Measure List as “Commissioning Controls Sizing New Manufactured Home Heat Pump – HSPF/SEER <9.0/14” will be expired.

**Rationale:** These measures for “new” and “existing” manufactured homes are identical in savings and payment. The additional measures provide no value and are being eliminated.

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**Change:** The current low income PTCS duct sealing measures for manufactured homes will no longer be available. New low income PTCS duct sealing measures will be available October 1, 2014.

**Rationale:** The measures being expired were out of sync with the standard income PTCS duct sealing measures updated by the RTF.





# Residential Sector

## Effective April 1, 2015

**Change:** All New ENERGY STAR/Built Green Single-family homes measures, Washington Only, will be expired and no longer available.

**Rationale:** The Washington State Energy Code changed on January 1, 2014 and NEEA is in the process of changing the way New ENERGY STAR homes are certified to reflect that change. New measures are being developed by NEEA and the RTF.

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**Change:** New insulation documentation requirement has been added. A description of home (single-family, multifamily or manufactured) is required.

**Rationale:** Savings and payment are specific to housing type. This information must be maintained in the customer file.



# Residential Sector

## Effective April 1, 2015

**Change:** New documentation requirement was added to the Whole House Air Sealing and Testing section: customers must retain audit or field notes detailing the age and description of home (single family/manufactured).

**Rationale:** These additional documentation requirements will assist in collection of critical data needed to maintain the savings for these measures.

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**Change:** Documentation requirements will be put in place for income status of households eligible for Low-income measures. Income documentation must be verifiable.

**Rationale:** Acceptable documentation of income was not identified and has been clarified.