



WELCOME

2023 HVAC KICK-OFF PRESENTATION

January 18, 2023

Presenters: Joanna Gomez, Tallulah Matthews, Terry Manning and Carl Brown

AGENDA

What's New in 2023?

2022 Program Overview

2023 Program Budget and Dates

Program Update

Important Reminders

Inspections



WHAT'S NEW IN 2023?

WHAT'S NEW?



HVAC PROGRAM CHANGES

SEER 2 HVAC Equipment is required for all A/C systems

- DOE has provision 10 CFR 429.102(c)(4)(i) allowing existing stock of discontinued sales/installation of single stage and two-stage air conditioners, Oncor will ONLY accept single stage and two-stage air conditioners with a SEER 2, AHRI rating for the 2023 HVAC program.

SEER and SEER 2 Equipment is accepted for H/P systems

- All new HVAC systems above the minimum SEER2, EER2 and HSPF2 efficiencies will be eligible for an incentive based on the kW and kWh savings generated based on the HVAC replaced.
- The new incentive calculation method is based on efficiency and capacity of the new system, and type of the old system replaced.
- This approach will likely provide a different incentive amount for each HVAC system combination installed.

HVAC PROGRAM CHANGES



2023 Program Minimum Efficiencies

System Type	System Capacity	SEER2	EER2
A/C Split Systems	A/C < 45,000 Btu/h	14.3	11.5
	A/C ≥ 45,000 Btu/h	13.8	11.5
A/C Single Package	All Btu/h	13.4	11.5

System Type	System Capacity	SEER2	EER2	HSPF2
H/P Split Systems	All Btu/h	14.3	11.5	7.5
H/P Single Package	All Btu/h	13.4	11.5	6.7

HVAC Incentive Caps by Tonnage

Tonnage	\$ Incentive Cap	
	HEE Program	LIW Program
2	\$1,800	\$1,900
2.5	\$2,000	\$2,100
3	\$2,400	\$2,500
3.5	\$2,700	\$2,800
4	\$3,000	\$3,100
5	\$3,200	\$3,300

Incentive Rate for Energy Savings

\$/KW	\$/kWh
\$31	\$0.027

Picture Requirements for the 2023 HVAC Program

HVAC		
New Construction (NC)	Early Retirement (ER)	ER replacing Electric Resistance heat
Legible picture required of new label	<u>Two pictures required legible or not</u> 1 of old unit even if not legible & 1 of new unit that is legible	<u>Three pictures required legible or not</u> 1 of old AC condenser label even if not legible, 1 picture of existing furnace showing no gas present & 1 of new condenser label that is legible

Upsizing New HVAC Equipment and Manual J Requirements

- Upsizing up to ½ ton of existing equipment without incentive penalty or Manual J
- Upsizing greater than ½ to up to 1 ton of existing equipment is accepted with a Manual J and is subject to a lower incentive
- Any upsizing over 1 ton of the existing equipment is not eligible for the program
- Data contained within the Manual J must be legible, accurately represent the location of the installed equipment and contain the calculations approved by ACCA

“New” HVAC App for incentive calculations



HVAC PROGRAM CHANGES - RADIANT BARRIER



Incentive for Radiant Barrier (per Sq. Ft.)

HEE Incentive

Existing Insulation Level	Gas	Electric Resistance	Heat Pump
≤ R-19	0.25	0.30	0.27
> R-19	0.18	0.25	0.20

LIW Incentive

Existing Insulation Level	Gas	Electric Resistance	Heat Pump
≤ R-19	0.30	0.36	0.32
> R-19	0.22	0.30	0.24

HEE Incentive for Square Footage			1,800
Existing Insulation Level	Gas	Electric Resistance	Heat Pump
≤ R-19	\$450	\$540	\$486
> R-19	\$324	\$450	\$360

LIW Incentive for Square Footage			1,800
Existing Insulation Level	Gas	Electric Resistance	Heat Pump
≤ R-19	\$540	\$648	\$583
> R-19	\$389	\$540	\$432



2022 PROGRAM OVERVIEW

PRIOR YEAR REVIEW



\$6,054,822

INCENTIVES PAID



15,130

AVERAGE kW



1297

TOTAL PROJECTS

29,489,487

AVERAGE kWh

Two curved lines, one red and one dark red, sweep across the top of the page from left to right, curving downwards as they move towards the right edge.

PROGRAM BUDGET & DATES

HVAC (HEE & LIW) 2023 BUDGET



PROGRAM	2023 INCENTIVE BUDGET	PR INCENTIVE RANGE (WEEKLY)	PR SUBMITTAL (WEEKLY)
Home Energy Efficiency	\$6,328,360	Not to Exceed \$40,000	1 per week
Low-Income	\$500,000	Not to Exceed \$40,000	1 per week

- Each SP is responsible for managing their budget and communicating with the PM.
- Current budget status, for program and SP is available on the SPs dashboard on the EEPM site.
- Expectation is that the SP will share budget status with their sales team and any other employees that are involved in marketing the program to customers.
- Funds can be moved from option to option depending on activity.

PROGRAM FUNDING



- **SPs can request additional funding (via email)** during the month if funding is available and CFR is less than 5% once they have submitted 75% of their tier allocation.
 - Each SP is responsible for monitoring and managing their budget.
 - The PM can add funds as needed at the request of the SP or as the budget allows.
- At their request, SPs exceeding their allocation for two consecutive months can be eligible to move to the next higher level of allocation if their CFR is less than 10% and funding is available.
- New SPs normally start in lowest tier but can be reviewed by the PM.
- When overall funding cannot support allocations each SP can receive additional funds at their request. **Funds will not be automatically added.**

HVAC PROGRAM TIMELINE



	Date	Event/Action
STEP 1	February 6	HVAC Program Open for Applications
STEP 2	February 6	Oncor reviews all applications and determines funding tier level for each Program Option
STEP 3		Oncor contacts each SP with allotted funding level for HVAC Program Option
STEP 4		HVAC Program Open for PRs

NOTE: A new application has to be submitted each year by all SPs. Applications will be available thru SP EEPM dashboard. SPs should review emails, contacts and phone number for current status before submitting application.

Any work or installations completed before the program opens on February 6 will **NOT be accepted.**

LOW-INCOME HVAC

LOW-INCOME HVAC



Oncor's HVAC program is now available to income qualified households.

Program changes from 2022 to 2023

- Expand eligible new HVAC systems to include SEER 14.5 or higher
- Required with each new HVAC installation is a smart thermostat that is listed on the DOE site

This program offers:

- Designated funding for income qualified customers only
- Additional program funding for participating SPs
- Same project entry process in EEPM
- New program year benefits



HOW TO IDENTIFY LOW-INCOME CUSTOMERS?



- Homes must have Oncor as their electric delivery provider.
- Participants must live in a house, or an apartment. Homeowners and renters (who have permission from the owner) may participate.
- Qualifying customers must meet the annual household income criteria at or below 200% of the federal poverty guidelines.



LOOK UP TOOL FOR INCOME VALIDATION



Oncor has selected the Easier Energy Efficiency Eligibility for Texas website www.e4-tx.com as it's look-up tool for the Low-Income Weatherization Program's verification source.

How to use the Look Up tool:

Visit www.e4-tx.com

Enter login:

- Username: Oncorverify
- Password: Oncorlowincomeverify

Once logged in follow the below steps:

Enter:

- "Address" and Meter #
- Residence Type
- Utility Co
- SP Name
- SP email


***Please note that these are REQUIRED fields.**

The screenshot shows the 'Address Verification' page for E4-TX. At the top, the logo for 'E4-TX Easier Energy Efficiency Eligibility for Texas' is displayed. Below the logo, a text instruction reads: 'This geo-eligibility tool verifies addresses for LIW reserve program category 1C eligibility. Enter an address, meter number and your information below to verify eligibility and print a certificate of proof'. The form contains several input fields, each with a red asterisk indicating it is required: 'Address' (a dropdown menu with the placeholder 'Please enter a Texas address'), 'Meter ID' (text input with '123456789LG'), 'Confirm Meter ID' (text input with '123456789LG'), 'Residence Type' (dropdown menu), 'Utility Company' (dropdown menu), 'Service Provider' (text input), 'Service Provider Email' (text input), and 'Customer Name' (text input with the placeholder 'Firstname Lastname'). A 'Submit' button with a checkmark icon is located at the bottom right of the form.

LOOK UP TOOL - INCOME VALIDATION (cont.)



Result




This Meter Address **Qualifies** For The LIW Reserve Program
Category 1C: Eligibility Through Geographic Location:


1. It Is **Outside Of** The HUD Texas QCTs Zone
2. It Is **Within** The HUD Texas LMISD Zone
3. It Is **Outside Of** The Opportunity Zone

Your unique report ID is:
031A980D-75AA-4C60-BDD3-7C9A12BB65EE

Please download the eligibility certificate by clicking "Print" and save the PDF file into your database to be included in the residence eligibility packet.



QCTs LMISD Both



Results will produce a **“GREEN”** checkmark if the address Qualifies for the LIW Program.

A unique report ID will be created

A **“Print”** button is ready for accessing the required **“Certificate”**


Map validates the address and is available for looking at surrounding area

LOOK UP TOOL - INCOME VALIDATION (cont.)



Submit

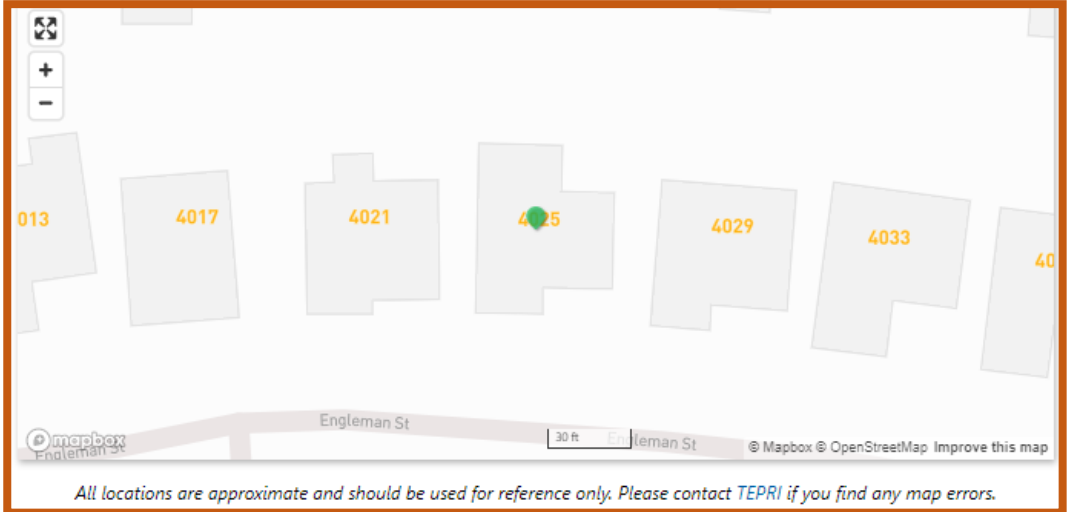
Result



This Meter Address **Does Not Qualify** For The LIW Reserve Program
Category 1C: Eligibility Through Geographic Location:

1. It Is **Outside Of** The HUD Texas QCTs Zone
2. It Is **Outside Of** The HUD Texas LMISD Zone
3. It Is **Outside Of** The Opportunity Zone

QCTs LMISD Both



mapbox Engleman St 30 ft Engleman St © Mapbox © OpenStreetMap Improve this map

All locations are approximate and should be used for reference only. Please contact [TEPRI](#) if you find any map errors.

+ New Report

Results will produce a **“RED” X** if the address Does Not Qualifies for the LIW Program.

There is NO “Print” button to access the required “Certificate”

Map available with the address and is available for looking at surrounding area and verifying the location

LOOK UP TOOL - INCOME VALIDATION (cont.)



Certificate from the “Print” button to be uploaded into EEPM



E4-TX
Easier Energy Efficiency Eligibility for Texas

 **Approved!**

This Meter Address Qualifies for the LIW Reserve Program
Category 1C: Eligibility through Geographic Location
Low- and Moderate-Income Data

Meter Address: 4109 Koala Dr, Killeen, TX, 76543, USA

Meter ID: 103993522LG

Service Provider: brown

Type of Residence: Single Family

ID: 031A980D-75AA-4C60-BDD3-7C9A12BB65EE
1/14/2022, 4:12:19 PM

LOW INCOME INSULATION INCENTIVES



Insulation Incentives – Flat Rate

Heating Type	Incentive per Sq. Ft.	Average incentive for a 1,500 Sq. Ft. Home
Electric resistance	\$0.46	\$690.00
Heat pump	\$0.21	\$315.00
Gas	\$0.18	\$270.00

Guidelines and Requirements:

- Incentives based on Sq. Ft. rather than existing insulation level (must report the existing insulation R-Value accurately).
- Existing insulation must be R22 or less.
- Required to insulate up to R38.
- Photo of the existing condenser unit, legible or not.
- Photo of the entire furnace indicating no flue or gas line exists if not reporting heating type Gas Furnace. Provide two photos if unable to capture the entire furnace in one.
- If blowing insulation when replacing the unit a new label photo is required. The new unit heating type must also be reported.



IMPORTANT PROGRAM REMINDERS

REPORTING AND FAILURES



- **Email addresses** for customers are required
 - If email address is not available enter na@na.com
- **“Primary Language”** on customer tab field should be populated
(Example: English, Spanish, Vietnamese, or Other)
- **Failures** will be classified as “Quality” or “Data entry”
 - Data Entry – human error/entries in EEPM
 - SPs will be allowed to submit corrections
- **Quality** – installation issue and/or equipment
 - Most quality failures are reporting the existing equipment incorrectly. **These are major failures and cannot be updated.**

LABEL INFORMATION



- A photo of the existing and new condenser label is required for each site. Please upload a clear photo of the condenser label whether legible or not legible.
- If reporting replacing an electric resistance unit with a heat pump - an option has been added within EEPM to report whether the existing condenser label is legible or not legible.
 - If reporting “label is legible” the model and serial number will be required for validation. If complete numbers cannot be reported, then the label is not legible. If inspection finds that the label is not legible and is reported legible, the measure will fail inspection and incentives and savings will be lowered.
 - If reporting “label is NOT legible” the incentives and savings will be lowered.

CUSTOMER INFORMATION



Leave a copy with each customer after work is completed!

- Customer Agreement (Electronic) 2023 Version only
- Income verification (*Low Income only*) (Electronic)
- Invoice from Service Provider
- Energy Efficiency Tips Brochure
- Use the word “INCENTIVE” and NOT “Rebate”



SP MARKETING MATERIALS

2023 Marketing Activity

- Any and All marketing activity **MUST** be reviewed and approved by Oncor prior to use.
- Use of the Oncor logo is prohibited.
- **Acceptable marketing activity can include:**
 - Social media
 - TV and/or Radio
 - Postcards
 - Newspaper
 - Other print advertising



Service Providers can request a copy of the EE Marketing Toolkit for more marketing guidance and requirements.

Example: George's Energy Solutions is an approved participating service provider in Oncor's Low-Income Weatherization Program. Through this program, we are able to install energy efficiency upgrades to help our customers reduce energy consumption.

MARKETING MATERIALS



Ordering Marketing Materials

- HVAC Door hangers and EE Tips brochures can be ordered online in quantities of 200 for \$28.50 per order.
- To order, visit: [Oncor E-Store](#)

NOTE: Incentive amount has been updated on door hanger marketing material. If you use the preprinted door hangers you will need to re-order and discard previous door hangers.



ONCOR.
TAKE A LOAD OFF, TEXAS


IS IT TIME FOR A NEW COOLING AND HEATING SYSTEM?

You can get up to \$3,500 in Oncor incentives.

Now's the time to take advantage of Oncor's incentives, up to \$3,500, that will help reduce your costs for a new high-efficiency system installation. The choices for a high-efficiency cooling and heating system couldn't be better:

- More cooling and heating for less money and energy
- Reduced operating noise
- Compatible with new technologies
- Keeps your home comfortable

Visit takealoadofftexas.com to find an approved participating HVAC provider in your area.



Energy Efficiency Tips

ONCOR'S TAKE A LOAD OFF, TEXAS®

PROGRAMS ARE DEDICATED TO HELPING TEXANS SEE HOW SAVING ENERGY MAKES CENTS. FOLLOW THESE SIMPLE TIPS, AND YOU CAN START SAVING TODAY.

ONCOR.
TAKE A LOAD OFF, TEXAS

THREE-STRIKE POLICY

- The Three-Strike Policy will be enforced
- Failures are Strike 1 offenses
- Failures will be classified as “Quality” or “Data entry”
- Data Entry – human error/entries in EEPM (can be updated)
 - Still a failure due to inaccurate or missing item submitted
 - SP can request PM review of errors
- Quality – installation issue and/or equipment (cannot be updated)
- Major issues identified, such as fraud, improper work or testing protocols may result in permanent termination

INSPECTIONS

HVAC POST INSPECTION – COMMON FAILURES

- Reporting the wrong type of system replaced
- Wrong AHRI number reported
- Entire condenser model number not reported
- Data entry errors
- Provide clear photos – check before leaving site



AHRI DATA INPUT

- After entering the AHRI number and the new unit data is auto populated from the AHRI database, you must enter the missing characters as displayed on the condenser label photo.
- The condenser model and serial reported within EEPM must match the condenser label.

Central Air Conditioner			
Existing Unit Name Plate Year	New Unit Capacity (Btu/h)	Is the replaced unit still operational?	SEER-Level
2001	32000	Yes	18.00-20.99
Climate Zone	Premise Type	Condenser Model #	Condenser Serial #
2	Existing Construction	24VNA937A*030*	3921e20616
Condenser Brand Name	Replaced Condenser Brand Name	Replaced Condenser Serial #	Replaced Condenser Model #
CARRIER		elgm404000	h2db024e06b
EER	AHRI Reference #	Type of Unit Replaced	Notes (Max. 1000 Characters allowed):
12.20	203685095	Central Air Conditioner	

MODEL NUMBER FROM CONDENSER LABEL (con't)

Central Heat Pump			
Climate Zone 2	Premise Type Existing Construction	New Unit Capacity (Btu/h) 48000	SEER-Level 16.00-16.99
HSPF-Level 9.5-9.9	Type of Unit Replaced Air Source heat Pump	Is the replaced unit still operational? Yes	Existing Unit Name Plate year 2016
Condenser Brand Name TRANE	Condenser Model # 4TWR6048H1	Condenser Serial # 21122KYG5F	Replaced Condenser Brand Name SURE
Replaced Condenser Model # SP1448AJ1NA	Replaced Condenser Serial # W251618056	AHRI Reference # 8858412	EER 13.00
Is the installed HP unit Rightsized? No	Existing Unit Capacity	Is Old Name Plate Legible? NA	Notes (Max. 1000 Characters allowed):

If the entire model number is not entered within EEPM your project will either be rejected back to you or the measures will be reported as a failure.



MODEL NUMBER FROM CONDENSER LABEL (con't)

Model and serial numbers match 

Central Heat Pump

AHRI Reference #

8331339

Climate Zone

2

Condenser Model #

DZ16SA0301BD

Condenser Serial #

2204108772

DAIKIN MANUFACTURING COMPANY, L.P.
19001 KERMIER RD, WALLER, TX 77484

MODEL DZ16SA0301BD

A.C. VOLTS 208-230

PHASE 1

SERIAL NO. 2204108772

HERTZ 60

DATA ENTRY ERRORS - CFR

- It's very important to review the data reported within EEPM and photos uploaded for each measure / site before submitting the project
- Data entry errors impact the cumulative failure rate (CFR)
- Should the CFR reach 5%, the number of sites selected for inspection will increase for each project
- Should the CFR reach 10%, EEPM will automatically place the Provider in lockout

Please do not hesitate to contact us with any questions prior to submitting your project. We are here to help. We would much rather discuss questions or potential issues prior to your project submission to assure that we can claim the maximum savings and pay the maximum incentive.

PHOTO REQUIREMENT

Existing Furnace

- If replacing an electric resistance unit with a new heat pump you must provide a photo of the **entire existing furnace** indicating no gas line or flue exists.
- **Please do not provide a photo of the new air handler / furnace rather than the existing.**



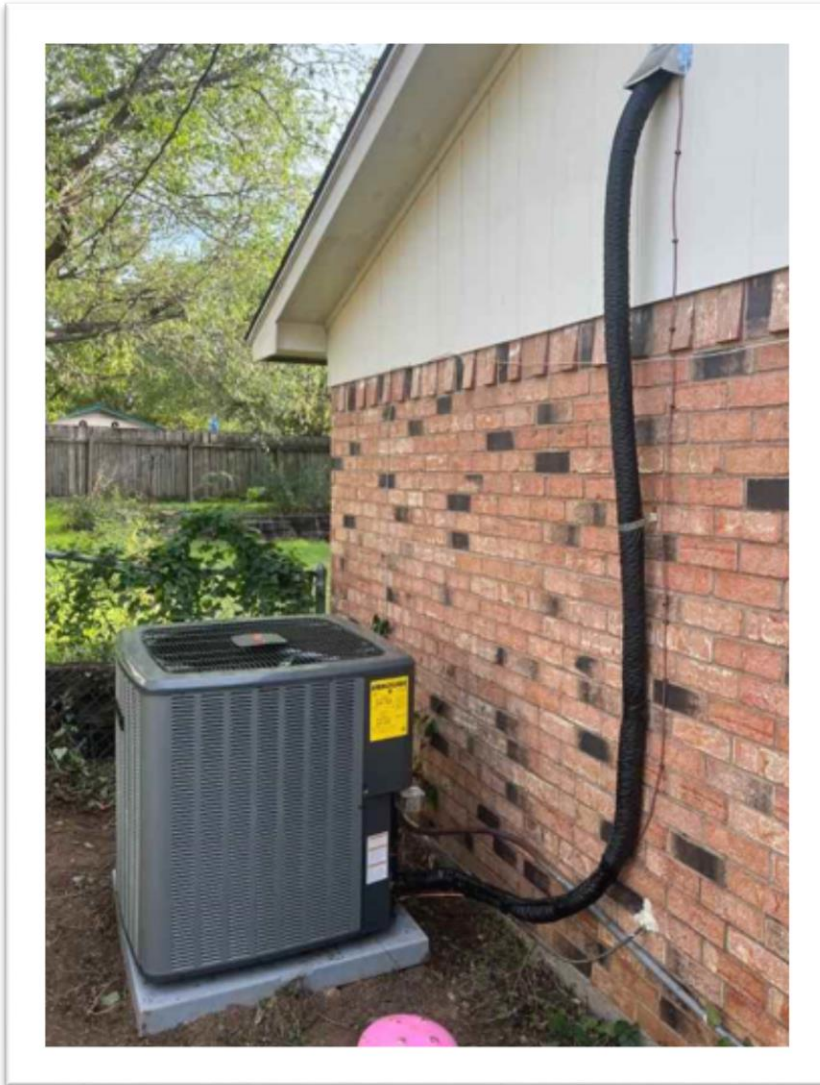
PHOTO REQUIREMENT (cont.)

Existing Furnace

If unable to capture the entire furnace in one photo provide two photos.



NEW CONDENSER INSTALLED



Take photo from a distance indicating the unit is installed

RADIANT BARRIER



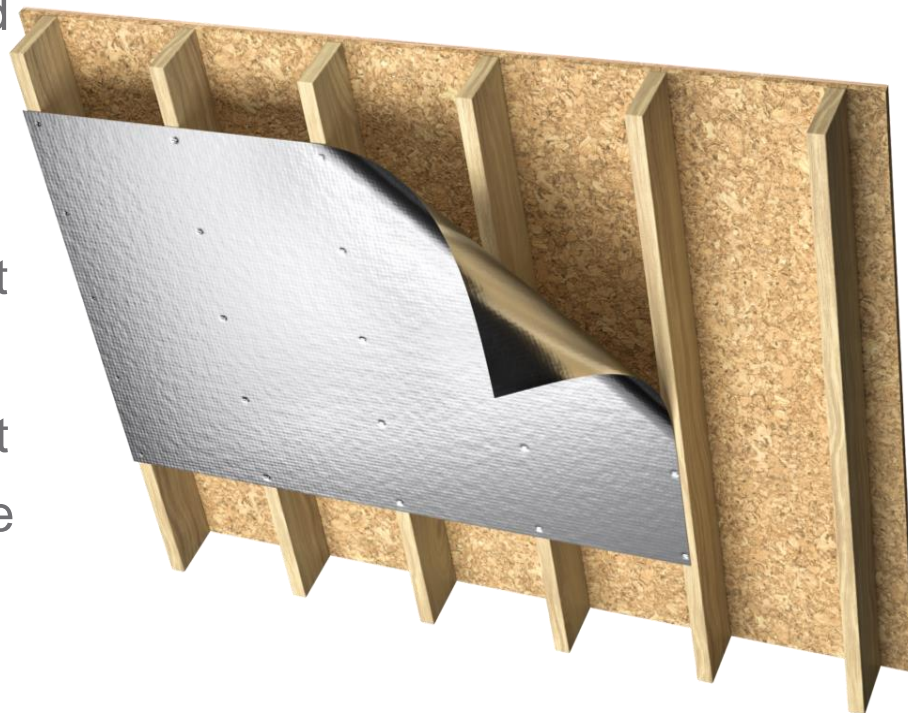
Radiant Barrier typically consist of a metallic foil material (usually aluminum) and are generally installed on the roof decking or beneath roof sheathing.

The radiant barrier must be compliant with the standards set by RIMA-I, including proper attic ventilation. A list of verified products is available on the RIMA-I website.

Sources:

<https://rimainternational.org/technical/testing/>

<https://www.reflectixinc.com/applications/diy/attic/>



RADIANT BARRIER PHOTOS



Information and photos required

- Clear photo of the condenser label to include the model and serial number for every measure submitted. If reporting heating type **Electric Resistance the condenser label must be legible**. If it's not legible, the incentive will be paid equal to heating type Heat Pump rather than **Electric Resistance**.
- Heating type (if reporting heating type **Electric Resistance** a photo of the entire air handler / furnace is required indicating no gas line or flue exists). If unable to capture the entire furnace in one photo, provide two photos.
- Ceiling insulation type.
- Ceiling insulation measurement photo (with ruler) to verify the number of inches of ceiling insulation (only required if reporting less than R19). See ceiling insulation R-value/inch chart.
- Square footage of home (area treated). Only the conditioned space of the area is treated is eligible. Only the original structure is eligible, add-ons and garage space do not qualify.
- Do not report the total square footage for a two-story home. Measure the footprint of the original structure and subtract any garage area / unconditioned space to obtain the reported square footage.
- In most cases reported square footage will be half or less than the total square footage for multi-level structures.
- Wide view photo of attic ceiling before installation and a wide view photo of attic ceiling after installation. If one wide view photo cannot be obtained due to space limitations, provide multiple photos that represent the area treated.

RADIANT BARRIER

Photo measurement of the existing ceiling insulation is required. Please take a clear photo at eye level to the ruler so we can tell exactly where the insulation meets the ruler.

6 inches blown Rockwool



15 inches blown White Fiberglass



EXISTING INSULATION

Blurry image – not acceptable

This photo is blurry at the bottom since the focus was on the top.



TIP: Focus on where the depth meets the ruler.

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CEILING INSULATION R / INCH CHART



Insulation R-values per Inch	
Material	R-value/in
Fiberglass (batt)	3.1
Fiberglass blown (pink or yellow)	2.2
Fiberglass blown (white/Insulsafe)	2.8
Mineral Wool (batt or blown)	3.1
Cellulose blown (attic)	3.7
Polystyrene Board	4.0
Polyurethane Board	6.0
Rockwool (batt)	3.2
Rockwool (blown)	2.8



CONTACT INFORMATION

WHO DO I CONTACT?



Question	Program Manager	Inspection Manager	EETM Help Desk
Unusual situation at customer's house	✓		
How to create a PR			✓
Discuss/Dispute a Failure		✓	
Submit a "Duplicate Measure" request			✓
Request more funding	✓		
Insurance question			✓
Program feedback	✓		
Question about the Program	✓		

CONTACT INFORMATION

Program Manager
Tallulah Matthews
(214) 486-3284 office
Tallulah.Matthews@oncor.com

Program Manager
Joanna Gomez
(214) 486-4153 office
Joanna.Gomez@oncor.com

Inspection Manager
Terry Manning
(214) 486-4624 office
tmanning@oncor.com

EEPM Help Desk
(866) 258-1874
EEPMsupport@oncor.com

Insurance
eepminsurance@oncor.com



THANK YOU!

2023 HVAC KICK-OFF PRESENTATION

