

Mass Save Home Energy Specialist 2022 Rebate Recommendation & Verifications

Overview

An important part of the Mass Save Home Energy Assessment is an efficiency and safety evaluation of appliances and HVAC systems. We also educate and help homeowners access available rebates and incentives offered by the program while making appropriate recommendations.

The current three-year plan has a strong focus and aggressive rebates to help drive electrification, heat pumps, and weatherization. As a result, there are updates to the recommendations that HES should make and critical information we must gather in the WFA software. This data is used to verify the eligibility and amount that customers receive in rebates. It is important that the information we collect is provided accurately and in a timely manner to ensure customer rebates are processed accurately and efficiently. The data will be transferred between our software programs and EFI, the rebate processing Administrator.

Below are the changes and resources that Energy Specialists will need in the field going forward. Please take special note of action required (forms to provide to customer, info to enter into WFA).

Supporting Documents

Please be sure to have the most up-to-date information when working with customers.

- [HVAC Recommendation Tree 2022](#)
- [2022 Weatherization + Heat Pump Bonus Form](#)
- [Market Rate Incentive Sheet 2022](#)
- [Moderate Income Incentive Rebates](#)
- [Email for Homes Post 2000](#)
- [Heat Loan Booklet](#)

New and Updated Resources

1. Heat Pump Training 101 (Required for all HEA Advisors)

All Energy Specialists are required to complete a new Heat Pump 101 training. This will help ensure all HES throughout the program are provided consistent training and messaging to customers. Communication will be sent separately for guidance on how to access the course.

2. HVAC Recommendation Tree 2022

The HVAC Recommendation Tree has been updated to help Energy Specialists make recommendations for the most efficient and cost-effective options for most homes. It is very important that HES enter HVAC recommendations into the WFA software.

- Specialists should make the HVAC recommendations that make the most sense for the home, taking into account the matrix and conversations with the homeowner.
- **Important note about Natural Gas to Heat Pump conversions:** The PAs want to make all customers aware of potential energy cost increases, especially Moderate Income customers. We should be clear that there are little-to-no cost savings when displacing Natural Gas with Heat Pumps. There are other factors to consider that make Heat Pumps the best option, but savings is not necessarily one of them for customers converting from natural gas.

3. Weatherization + Heat Pump Bonus Form

Customers eligible for the Partial Home Heat Pump Rebate can also receive a \$500 Weatherization Bonus for completing weatherization work over \$1,000 within 6 months of their Heat Pump installation (before or after).

- At the HEA, Energy Specialists should provide customers who have contracts over \$1,000 with the 2022 Weatherization + Heat Pump Bonus Form.

Rebate Verification Responsibilities

Rebates in the current plan are aggressive and require information on the existing equipment to determine eligibility and rebate tier. The following data points are to be obtained and updated at each Home Energy Assessment to ensure proper rebate authorizations. Below are the WFA Fields that are used for verification of rebates:

1. Moderate Income Status (Enhanced Incentives)

Determines eligibility for 7K pre-wx rebate, Enhanced HVAC rebates, and 100% Wx.

- Encourage customers to apply if they meet the income guidelines.
- For more information or to apply for Enhanced Incentives, visit: <https://www.masssave.com/saving/energy-assessments/enhanced-residential-program/> or <https://masssave-qualify.clearesult.com>
- When approved, the Lead Vendor is notified and will update the contractor and WFA.
- Sometimes the customer may be notified of their status first in which case simply provide a copy of their letter to the LV.
- See Moderate Income Rebates for 2022.

2. Single Pane Window Qty.

Determines eligibility for a \$75 rebate per window with no cap and 0% financing up to \$25k when replacing single with triple pane windows.

- Under Enclosure - Enter the number of single pane windows in the home.
- Completing scoped Mass Save weatherization work is required to qualify. See "completed weatherization."

3. Stove Top Fuel

\$500 rebate for induction stoves when replacing an existing gas or propane stove top.

- Under Refrigerator & Other Energy Loads Information - Enter Stove top fuel.

4. Clothes Washer Evaluation

\$150 to go from top loader with an auger to Energy Star

- Confirm eligibility. Eligible for the rebate if the existing washer is:
 - currently working
 - top loading
 - has an auger/ agitator

If eligible:

- Under Clothes Washer Information
 - Click yes to "Do you wish to provide additional clothes washer system details (required for Early Clothes Washer Rebate eligibility)?"
 - Complete all fields, including type, agitator, make & model.
 - Click yes to "All clothes washer info is complete and should be sent to rebate vendor for Early Clothes Washer Rebate eligibility?"
- Provide the customer with a rebate form pre-populated.

5. Heating Systems Verification

Determines eligibility for HVAC Rebates and Tier level.

- 2 Photos of the heating system. A picture of the system standing back and a close-up of the plate should be obtained at every assessment and stored in a centralized location managed by the HPC (not just on Energy Specialists' phones). The photos must be retrievable on an as-needed basis. They do not need to be attached to WFA.
- Under Heating Information enter:
 - Primary heating fuel
 - Primary heating system type (Condensing Boiler or Furnace or Non-Condensing Boiler or Furnace)

6. Weatherization Opportunity

The window incentives and the Whole Home Heat Pump rebate require the home to be sufficiently weatherized, and the following information must be accurately entered into WFA.

- Recommend ***all*** Mass Save opportunities in the home.
- Under House Construction Details - Enter the year built.

Completed Weatherization

As a reminder, homes that can provide proof of meeting one or more of the below criteria will be considered "sufficiently weatherized" to qualify for the Whole Home and Windows Rebates:

- Homes built in 2000 or later auto-qualify – Email template for customers available if they want something in writing. EFI will verify the age of the home at the time of processing the rebate.
- Homes that had any Wx project completed from 2013 to May 2022 qualify.
- Projects started after May 2022 need to complete at least 75% of all recommended Wx opportunities (when the total job cost is over \$1,000).
- All Pre-Wx Barriers must be overcome (roadblocks are not exceptions to Wx).
- Major structural issues may have some exceptions when a barrier cannot be overcome without major construction. LV approval only.