

Overview of Mass Save 2022 Rebates

Updated 7/27/22

Heat Pump Rebates

- Whole Home Rebate Amount - \$10K
 - For whole home conversion to heat pumps. Must be purchased and installed in 2022 by a licensed contractor.
 - Beginning in 2023 contractors must part of the Heat Pump Installer Network.
 - HEA Requirement: Only for homes built prior to 2000 that need Wx opportunity identified.
 - Wx Requirement: home must be “sufficiently weatherized”, as defined in the green box below
 - Forms: (1) COC from completed Wx (from HPC/LV); (2) Heat Pump Rebate Form (from Mass Save website); (3) Whole Home Verification Form (from Mass Save website); (4) Invoice for HP install.
 - Deadline: Applications must be postmarked within 60 days of install.

- Partial Home Rebate Amount – \$1,250 per ton
 - For supplemental heat pump installation. Must be purchased and installed in 2022 by a licensed contractor.
 - HEA requirement: None.
 - Wx requirement: None.
 - Forms: Heat Pump Rebate Form (from Mass Save website); (2) Invoice for HP install.
 - Install Restrictions: Integrated controls are required except for Electric resistance.
 - Deadline: Rebate applications must be postmarked within 60 days of install.

HVAC Rebates for Fossil Fuel Systems

- Tier 1: Condensing to Condensing
 - HEA requirement: None.
 - Wx requirement: None.

- Tier 2: Non-Condensing to Condensing
 - HEA requirement: HEA or SHV is required for Tier 2 rebates in order to verify that the existing equipment is non-condensing. In the meantime, Abode will handle the verification of non-condensing to condensing systems based on the CST.
 - WX requirement: None.

Windows

- Rebate Amount: \$75 rebate per triple pane window when replacing a single pane window
 - HEA requirement: eligible single-pane windows are identified by a HES and entered into WFA (number passes through to the Heat Loan Intake Form).
 - Wx Requirement: All Wx must be completed as defined as defined by the program as "sufficiently weatherized"
- Financing:
 - New loans are available for single pane to triple pane windows only
 - Triple-pane windows are eligible for financing up to the full loan amount of \$25,000. Previous caps have been limited on the max cost per window and max amount to be financed (was \$500/per up to \$10,000).

Induction Stovetop

- Rebate Amount: \$500
 - For replacement of Propane and Natural Gas stovetops.
 - HEA requirement: existing stovetop fuel identified by HES and entered into WFA.
 - If the customer is looking for verification only, the lead should be sent to LV for SHV.
 - Wx requirement: None.

Clothes Washer

- Rebate Amount:
 - For replacement of inefficient washing machines. Existing equipment must be operational and be a top loader with an auger.
 - HEA requirement: Existing equipment identified by HES and entered into WFA.
 - If a customer is looking for verification only, the lead should be sent to LV for SHV.
 - Wx requirement: None.
 - Forms: Rebate form is generated during the site visit in WFA for the HES to provide to the customer.

Moderate Income Enhanced Rebates

- Enhanced rebates and remediation services for customers who have been approved for the Moderate Income Incentive.
- 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>
- HEA requirement: To identify Wx opportunity.
- Wx requirement: All Wx opportunities must be completed to receive roadblock remediation or heating equipment rebates.
 - Weatherization: 100% incentivized.
 - K&T and/or Vermiculite: \$7,000 for roadblock remediation. Rebate is paid before the remediation is completed so that customers are not out-of-pocket.
 - Heating Equipment: \$TBD for heating equipment replacement.

Sufficiently Weatherized

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 Rebate and Windows:

- Constructed during or after 2000. Email template for customers is available if they want something in writing. EFI will verify the age of the home at the time of processing the rebate.
- Received any weatherization through the Mass Save program between 2013 and May 2022.
- For projects completed from May 2022 on, either:
 - Less than \$1,000 of weatherization work is recommended OR
 - More than \$1,000 of weatherization work was recommended and 75% of recommended work is installed. Abode will verify.
- All pre-wx barriers must be overcome.
- Major structural issues may have some exceptions when a barrier can not be overcome without major construction. LV approval only.

Email to share with customer whos homes are built in 2000 or later

“Thank you for reaching out – it was great speaking with you.

As discussed, in order to access whole-home heat pump rebates, the Sponsors of Mass Save require residential customers to either complete weatherization recommendations made during a Home Energy Assessment or provide verification that their home has been sufficiently weatherized (e.g., home built during or after the year 2000 or home has previously received air sealing or insulation through the Mass Save program between 2013 and 2021).

Based on the information you’ve provided about the age of your home, your home would be considered “sufficiently weatherized” and you will not be required to complete a Home Energy Assessment or weatherization work in order to access whole-home rebate amounts. Our rebate processing team will verify this during rebate processing, but please feel free to print this email and include it with your rebate submission as well. To learn more about whole-home heat pump rebate requirements, please see the [Whole-Home Heat Pump Verification Form](#).

Please note, although additional weatherization is not required for you to take advantage of these whole-home heat pump rebates, a [no-cost assessment](#) and generous weatherization incentives are still available to you.”

Heat Pumps

Pre-existing Fuel Type	Equipment Type	Rebate Type	Efficiency Requirement	Additional Requirement	Rebate Amount
Oil, Propane, Natural Gas or Electric Resistance	Air Source Heat Pumps	Partial-Home	Refer to the Heat Pump Qualified Products List at MassSave.com/HPQPL	Heat Pumps must be used to supplement the pre-existing heating system during heating season. If pre-existing system is oil, propane or natural gas, integrated controls must be installed. (Refer to MassSave.com/ICQPL)	\$1,250 per ton
		Whole-Home		Heat Pumps must be used as the sole source of heating during heating season. Whole-home verification form must be completed and signed. Weatherization recommendations made during a Home Energy Assessment must be complete prior to installation.	\$10,000 per home
Oil, Propane or Natural Gas	Air to Water Heat Pump	Whole-Home	Refer to the ENERGY STAR Certified list		\$10,000 per home
Oil, Propane, Natural Gas or Electric Resistance	Ground Source Heat Pumps	Whole-Home			\$15,000 per home
Oil, Propane, Natural Gas or Electric Resistance	Ground Source Heat Pumps	Whole-Home	Refer to the ENERGY STAR Certified list	Heat Pumps must be used to supplement the pre-existing heating system during heating season. If pre-existing system is oil, propane or natural gas, integrated controls must be installed. (Refer to MassSave.com/ICQPL)	\$2,000 per ton

Condensing Boilers and Furnaces

Fuel Type	Equipment Type	Efficiency Requirement	Additional Requirement	Standard Rebate Amount	Enhanced Rebate Amount
Natural Gas	Hot air furnace with ECM	≥95% AFUE	Customers replacing existing Condensing Natural Gas Furnaces or Boilers are not eligible for higher incentive levels. If pursuing enhanced rebates, Pre-Verification is required prior to installation.	\$200 per unit	\$750 per unit
	Hot air furnace with ECM	≥97% AFUE		\$200 per unit	\$1250 per unit
	Combined condensing furnace with on-demand water heater	≥97% AFUE		-	\$950 per unit
	Hot Water Boiler	≥95% AFUE		\$200 per unit	\$2750 per unit
	Combined condensing boiler with on-demand water heater	≥95% AFUE		-	\$1600 per unit
Oil	Hot air furnace	≥86% AFUE	-	-	\$650 per unit
Propane	Hot air furnace with ECM	≥95% AFUE	Customers replacing existing Condensing Propane Furnaces or Boilers are not eligible for higher incentive levels. If pursuing enhanced rebates, Pre-Verification is required prior to installation.	\$200 per unit	\$750 per unit
	Hot Water Boiler	≥95% AFUE		\$200 per unit	\$2,300 per unit
	Combined condensing boiler with on-demand water heater	≥95% AFUE		-	\$1600 per unit
	Combined condensing furnace with on-demand water heater	≥95% AFUE		-	\$950 per unit

Water Heaters

Fuel Type	Equipment Type	Efficiency Requirement	Additional Requirement	Rebate Amount
Oil, Propane, Natural Gas or Electric Resistance	Heat Pump Water Heater	≥3.2 UEF	Instant incentives are available for qualified heat pump water heaters purchased through a participating distributor.	\$750 per unit
Natural Gas	Storage water heater	≥ .64 UEF Medium Draw ≥ .68 UEF High Draw	-	\$100 per unit
	On-demand tankless water heater	UEF ≥.87	-	\$700 per unit
	Condensing water heater	UEF ≥.80	-	\$500 per unit
Propane	Indirect water heater	-	Connected to water boiler	\$400 per unit
	On-demand tankless water heater	UEF ≥.87	-	\$700 per unit
Oil	Indirect water heater	-	Connected to water boiler	\$400 per unit

Thermostats & Controls

Product Type	Efficiency Requirement	Additional Requirement	Rebate Amount
Programmable Thermostat	-	Limit 3 per account	\$25 per unit
Smart Thermostat	ENERGY STAR® Certified	Limit 3 per account	\$100 per unit
Integrated Control	Refer to MassSave.com/ICQPL	Limit 3 per account. Add on to an existing air source heat pump.	\$500 per indoor unit

Moderate Income Measures 2022

Heat Pumps

Pre-existing Fuel Type	Equipment Type	Rebate Type	Efficiency Requirement	Additional Requirement	Rebate Amount
Oil, Propane, Natural Gas or Electric Resistance	Air Source Heat Pumps	Partial-Home	Refer to the Heat Pump Qualified Products List at MassSave.com/HPQPL	Heat Pumps must be used to supplement the pre-existing heating system during heating season. If pre-existing system is oil, propane or natural gas, integrated controls must be installed. (Refer to MassSave.com/ICQPL)	\$8,000
Oil, Propane, or Natural Gas		Whole-Home		Heat Pumps must be used as the sole source of heating during heating season. Whole-home verification form must be completed and signed. Weatherization recommendations made during a Home Energy Assessment must be complete prior to installation.	\$16,000
Oil, Propane or Natural Gas	Air to Water Heat Pump	Whole-Home	Refer to the ENERGY STAR Certified list		
Oil or Propane	Ground Source Heat Pumps - Closed Loop	Whole-Home		Refer to the ENERGY STAR Certified list	
Oil or Propane	Ground Source Heat Pumps - Open Loop	Whole-Home	Refer to the ENERGY STAR Certified list		Heat Pumps must be used to supplement the pre-existing heating system during heating season.
Oil or Propane	Ground Source Heat Pumps - Closed Loop	Partial-Home		Refer to the ENERGY STAR Certified list	
Oil or Propane	Ground Source Heat Pumps - Open Loop	Partial-Home	Refer to the ENERGY STAR Certified list		\$10,000

Condensing Boilers and Furnaces

Fuel Type	Equipment Type	Efficiency Requirement	Additional Requirement	Standard Rebate Amount	Enhanced Rebate Amount
Natural Gas	Hot air furnace with ECM	≥95% AFUE	Customers replacing existing Condensing Natural Gas Furnaces or Boilers are not eligible for higher incentive levels. If pursuing enhanced rebates, Pre-Verification is required prior to installation.	\$1,000	\$6,000
	Hot air furnace with ECM	≥97% AFUE		\$1,000	\$6,500
	Hot air furnace with ECM and on-demand DHW	≥97% AFUE		\$7,300	
	Hot Water Boiler	≥95% AFUE		\$1,000	\$6,600
	Combined condensing boiler with on-demand water heater	≥95% AFUE		\$7,300	
Oil	Hot air furnace	≥86% AFUE	Customers replacing existing condensing furnaces are not eligible for enhanced rebates. If pursuing enhanced rebates, Pre-Verification is required prior to installation.	\$6,000	
Propane	Hot air furnace with ECM	≥95% AFUE	Customers replacing existing condensing furnaces or boilers are not eligible for higher incentive levels. If pursuing enhanced rebates, pre-verification is required prior to installation.	\$1,000	\$6,000
	Hot Water Boiler	≥95% AFUE		\$1,000	\$6,000
	Combined condensing boiler with on-demand water heater	≥95% AFUE		\$6,000	
	Combined condensing furnace with on-demand water heater	≥95% AFUE		\$6,000	

Mass Save® Heat Pump Installer Network

Frequently Asked Questions

1. What residential rebates are available for heat pumps in 2022?

The Sponsors of Mass Save offer rebates on air source heat pumps (ducted/central and ductless/mini-split), air to water heat pumps, and ground source heat pumps (geothermal).

Equipment Type	Partial-Home Rebate	Whole-Home Rebate
Air Source Heat Pump	\$1,250 per ton, maximum of \$10,000	\$10,000 per home
Air to Water Heat Pump	n/a	\$10,000 per home
Ground Source Heat Pump	\$2,000 per ton, maximum of \$15,000	\$15,000 per home

More information on residential heat pump rebates, as well as access to the online rebate portal and 2022 residential rebate forms, can be found [here](#).

2. What are the residential heat pump eligibility requirements?

- **Participant:** Offers valid only for residential customers in Massachusetts where Berkshire Gas, Cape Light Compact, Eversource, Liberty Utilities, National Grid, or Unitil is the Program Sponsor
 - Rebates for heat pumps displacing electric resistance, oil, or propane heating are offered to electric customers of the participating Program Sponsors
 - Rebates for heat pumps displacing natural gas heating systems are offered to natural gas customers of the participating Program Sponsors
- **Building:** Equipment installed in residential homes with 1-4 units may qualify for either partial or whole-home rebates. Equipment installed in individual dwelling units in residential 5+ unit complexes, including 1-4 unit buildings that are part of larger complexes, can fully displace their existing heating system but do not qualify for whole-home rebates. These customers are eligible for the partial-home rebate amounts.
- **Timeframe:** Equipment must be purchased and installed between January 1, 2022, and December 31, 2022. Rebate forms must be filled out completely, signed, accompanied by dated invoices, and received by the Mass Save representative within 60 days of installation.
- **Installer:** Equipment must be installed by a licensed contractor. Beginning in 2023, residential heat pump rebates will only be available for heat pumps that are installed by participating Mass Save Heat Pump Installers. See #6 for additional requirements for the Mass Save Heat Loan.

- **Equipment Efficiency:** Air Source Heat Pumps must be listed on the [Mass Save Heat Pump Qualified Products list](#). Ground Source Heat Pumps must be ENERGY STAR certified. Integrated controls must be listed on the [Integrated Controls Qualified Products List](#).
- **Equipment Use:** Heat Pumps must be used to supplement or replace oil, propane, natural gas, or electric baseboard (resistance) as primary heating system. *Heat pumps replacing existing heat pumps are not eligible for rebates.*
 - **Partial-Home displacement:**
 - Integrated controls must be installed in homes with a pre-existing heating type of propane, oil, or natural gas
 - Integrated control switch-over temperatures must be set at or below 15°F when configuring heat pumps to operate alongside existing propane heating systems and at or below 30°F when configuring heat pumps to operate alongside existing oil or natural gas heating systems
 - **Whole-Home displacement:**
 - Heat pumps must be sized to be capable of being the sole source of heating
 - Weatherization recommendations made during a Home Energy Assessment must be completed or proof of sufficient weatherization must be provided
 - Pre-existing heating systems must be either removed, disconnected, or customers must attest to only use as an emergency back-up
 - Homes must be occupied full time during the winter heating season
- **Documentation:** Rebate submissions must include all required documentation –
 - Completed and signed rebate form.
 - Contractor invoice that includes company name, installation date and address, outdoor and indoor equipment model numbers, integrated control model numbers (if applicable), and must be marked paid in full or otherwise indicate the sale is complete. If a customer is requesting rebates for more than one system, invoice must include costs itemized per system.
 - If pursuing whole-home rebates, completed and signed whole-home verification form, as well as proof of weatherization.

Heat pumps installed as part of a new construction or major renovation project (500 sq ft. or greater), may be eligible for the Mass Save Residential New Construction or Renovations and Additions Programs.

3. How do the Sponsors define “partial-home” for partial-home rebates?

New heat pumps installed to supplement an existing heating system or to heat and cool just a section of a home are considered partial-home heat pumps and may qualify for partial-home rebates.

4. How do the Sponsors define “whole-home” for whole-home rebates?

New heat pumps installed as the sole source of heating and cooling and sized to satisfy 90-120% of the peak heating load throughout out 100% of the conditioned space are considered whole-home heat pumps and may qualify for whole-home rebates. More information on whole-home rebate requirements can be found [here](#).

5. How do the Sponsors define “sufficiently weatherized” for whole-home rebates?

Homes that can provide proof of meeting one or more of the below criteria will be considered “sufficiently weatherized” by the Program Sponsors:

- Constructed during or after 2000
- Previously received air sealing or insulation through the Mass Save program (2013-2021)
- Virtual or on-site Mass Save Home Energy Assessment is completed in the 2022-2024 term and documentation indicates:
 - Less than \$1,000 of weatherization work was recommended
 - More than \$1,000 of weatherization work was recommended and all recommendations have been completed

Heat pumps installed for whole-home heating and cooling that do not meet the weatherization requirement may be eligible for partial-home rebate amounts.

6. Are customers receiving residential heat pump rebates eligible for HEAT loan financing?

Yes, in addition to residential rebates, the Sponsors of Mass Save offer an interest-free financing opportunity for heat pump installations. Effective March 1, 2022, participation in the HPIN is required to grant access for heat pump installations. More information on HEAT loan can be found [here](#).

7. What expectations do the Sponsors have for the quality of installations, and how is this verified?

Installation expectations are outlined in the Mass Save Residential Air Source Heat Pump Quality Installation Check-list. To verify quality installations, approximately 10% of all residential heat pump installations are inspected by a third-party vendor prior to rebate payment.

8. What resources are available to customers considering heat pump installations?

The Sponsors of Mass Save offer information on heat pumps through a variety of tools and resources including the Mass Save Heating Comparison Calculator, a contractor look-up tool, and virtual Heating & Cooling Consultations. More information on customer resources available can be found [here](#).

9. What resources are available to contractors through the Heat Pump Installer Network?

Through the Heat Pump Installer Network, the Sponsors of Mass Save offer access to rebates and financing, leads and referrals, marketing support, and technical resources. More information on the benefits of participation can be found [here](#).

10. What is required to remain active in the Heat Pump Installer Network?

Prior to January 2023, all primary installers must complete assigned cold-climate heat pump trainings via the Mass Save Energy Efficiency Learning Center. These trainings are currently under development but will include information on program participation, the importance of weatherization, installation best practices, and more. Air source heat pump installers must also provide certification of cold-climate sizing and design training by a heat pump manufacturer.

For more information, contact HVAC@MassSave.com

MASS SAVE® SPONSORS 2022-2024 PLAN

Residential Contractor Presentation

Questions & Answers

GENERAL QUESTIONS

- 1. Will a contractor line be added to the program to support the contractors with questions about customer specific concerns? So far it has been difficult to get verifiable information from Mass Save® as a participating contractor.**

We do not currently have plans to introduce a contractor-specific phone line. However, contractors looking for more information or assistance are welcome to reach out to our Heating & Cooling program team at HVAC@MassSave.com, or their Account Manager at their respective Lead Vendor.

- 2. When will all this new rebate and incentive information be available on the Mass Save website? A lot of the website content still references 2021 information.**

The majority of the 2022 updates have been made to the site. Some pages, like the HEAT Loan page, enhanced HVAC offers for moderate income, and other new offers are in the process of being added and should be live in June.

- 3. Will there be an effort to link heat pump contractors or weatherization contractors to do both measures in one agreement?**

Contractors may choose to partner together to offer coordinated services to customers to streamline the installation of weatherization measures and heat pumps. Participating Heat Pump Installer Network Contractors, Independent Installation Contractors, and Home Performance Contractors are all listed on MassSave.com.

Visit <https://www.masssave.com/en/learn/find-a-contractor> for additional information.

- 4. Will there be information about the upgraded and new pricing study and results to be implemented - timing and level of information provided?**

All pricing communications related to CLEARResult's Request for Qualifications on Residential Coordinated Delivery weatherization measure pricing will be communicated via CLEARResult to participating bidders.

- 5. Where do we get detailed training for the rebate program? There are contradictory answers when we call Mass Save rebate vs. some of what we heard during the contractor presentation and what is on the website.**

Residential Heat Pump Basics training is available at no-cost through the Energy Efficiency Learning Center. This 45-minute training provides an overview of heat pump rebates, eligibility requirements, and the Mass Save Heat Pump Installer Network.

More information on available trainings can be found here:

<https://www.masssave.com/en/learn/partners/heat-pump-installer-training>

6. Do homeowners qualify for incentives if they are planning on renovating their whole home?

Customers pursuing a whole-home renovation or addition should use the renovations and addition path.

Details can be found here: <https://www.masssave.com/en/saving/residential-rebates/renovations-and-additions>

7. What enhancements are planned for the heating comparison calculator?

Planned enhancements to the heating comparison calculator include updated assumed fuel prices, including functionality that allows customers to modify those costs, increased rebate eligibility clarity, use of average municipal electric rate if a customer resides in a municipal electric territory, and an increase in average install costs to align with market conditions.

8. Thank you for providing a heating comparison calculator. What cost assumptions are used for each fuel type? It seems like the costs used for propane and oil are lower than they should be.

The Sponsors of Mass Save are working to update the fuel cost assumptions used by the Mass Save Heating Comparison Calculator to reflect the impacts of recent price increases. These updates are ongoing.

9. I've gotten a lot of mixed responses regarding municipalities this year. Can you explain again what scenario would qualify somebody for Mass Save rebates when they have a municipal utility?

Customers in a municipal electric territory are only eligible if they receive natural gas service (and use it for heating) from one of the Mass Save Sponsors.

RESIDENTIAL COORDINATED DELIVERY

1. General

- a. What about the multi-family program? On Cape Cod, where our company is located, the energy audit process for individual unit owners/renters can take months to turn into weatherization work, and only if there's enough interest from their neighbors.**

For questions on Multi-Family offerings for sites on Cape Cod, please contact 800-797-6699.

- b. Is the whole building incentive NOT income based?**

The Whole Building Incentive 100% Weatherization incentive is not income-based; it applies to two-to-four-unit market rate buildings in which two or more of those units are

proceeding with recommended program weatherization. Each unit's contract would be incentivized at 100%.

- c. We are learning from customers that the wait time for available assessment appointments is one to two months. Is there a plan to improve the wait time for assessment appointments?**

Customers can have an assessment through a Lead Vendor or a Home Performance Contractor. Wait times vary by company. Virtual assessments are also available and may have shorter wait times. We encourage all customers thinking about making the transition to schedule their assessment as soon as possible to avoid any scheduling delays or issues.

- d. We have been told there are no more virtual energy assessments. Is that true?**

Virtual assessments are still available.

2. Weatherization

- a. Are windows included in weatherization?**

No, windows are not included in the weatherization incentives. Beginning in June 2022 qualifying windows will be eligible for a rebate. Customers can receive \$75 per window when replacing single pane windows with triple pane, ENERGY STAR certified windows. Windows must be pre-qualified prior to installation. Customers can call 866-527-SAVE (7283) to get started with the prequalification. After installation, customers can submit for the rebate online or via the mail.

- b. Is spray foam available for insulation remedies?**

Spray foam is currently under consideration as an eligible program measure. More information will be communicated as this is finalized and made available.

- c. To install many of the more efficient heating products, you often need to move the location of the thermal envelope. Historically, Mass Save has not allowed this. Has that approach been adjusted (e.g., to bring the ASHP into the building envelope)?**

Customers should discuss their entire energy efficiency improvement project with their Energy Specialist so that site specific conditions and overall project technical considerations can be reviewed when developing a weatherization specification. Moving the thermal envelope may be permitted on a case by case basis if required by site and project specification as discussed with the Energy Specialist.

- d. Will the program incentivize insulating an attic slope to bring a central heat pump system with duct work into the thermal envelope?**

The appropriate weatherization approach for any home is determined by the Energy Specialist based on site specific conditions and the customer's overall roadmap for energy efficiency improvements.

- e. **Many of these newer incentives are subject to "all weatherization work is addressed". Would that also include the harder to address items such as a brick exterior home that would need to be done from the interior?**

Yes, if a customer is recommended weatherization, the customer will need to complete at least 75% of the total job cost of the recommended work, to access the whole-home heat pump rebates, regardless of barriers that are present. Customers do have the ability to finance the removal of certain barriers to weatherization.

- f. **There's been a lot of questions about rebates here, but can we talk about the lack of weatherization work right now? Our company is seriously hurting, and we've gotten very little explanation of what's going on.**

The Mass Save Sponsors note that initial weatherization volume in 2022 is different than early 2021 when we were seeing much of the 100% incentive volume. There are also more participating contractors in the program now than in the past, so the relatively lower work volume is spread across many more contractors. As an IIC, you can follow up with your Lead Vendor for additional information.

3. Training

- a. **Will the Energy Specialist Training be at a scheduled time, or on-your-own?**

Home Performance Contractors should contact their Lead Vendor to discuss the timing of Energy Specialist trainings.

- b. **Customers are expecting our Home Energy Specialists to be HVAC experts. How soon will training become available?**

The heat pump training for Energy Specialists is being finalized and will be required. The Mass Save Sponsors anticipate having this available in the June/July timeframe, but information will be communicated as soon as it is available. Please note, we do not expect Energy Specialists to fill the role of an HVAC contractor. The goal of the training is to provide Specialists a high-level understanding of heat pumps and the Mass Save offers available. System sizing and design recommendations should be reserved for HVAC contractors.

4. Miscellaneous

- a. **Are Energy Specialists also installing Heat Pumps?**

Some Home Performance Contractors also do HVAC work; however, the customer is not obligated to use the same contractor for both weatherization and HVAC installations.

- b. **How are the Energy Specialists going to message/discuss "integrated controls" and the effect(s) that they may have on the comfort and use of their existing and new heat pump systems?**

Energy Specialists are going to receive standardized statewide training including Integrated Controls so that consistent information is provided to customers on an array of Heat Pump related subject matter.

c. What is the process for an IIC that can install heat pumps?

Companies that have the expertise, credentials, and interest in installing heat pumps should work to become a participant in the Mass Save Heat Pump Installer Network. More information can be found here: <https://www.masssave.com/learn/partners/heat-pump-installer-network>

d. Is there a site we can access prior to a Participating Contractor Referral (PCR) submission to determine how can we all get on the same page? I've submitted a few PCR's and Mass Save says it's a CAP job and CAP has said they're not on a discounted rate and the job stays on idle mode.

Contractors should contact their RCD Lead Vendor regarding the PCR process in general or for questions related to any specific customers' participation.

e. There is a disconnect between HVAC partners in the HPIN vs. HPCs regarding changes/updates to the rebates. It has been pretty fluid on some of the nuances. How can HPCs receive the most up to date information that it seems the HPINs get regularly?

HPCs should work with their Lead Vendors regarding any questions on available rebates including eligibility and any applicable pre-requisite requirements. HPCs can also sign up for the monthly heating and cooling e-newsletter here: <https://www.masssave.com/en/learn/partners>

Additionally, HPCs who have the expertise, credentials, and interest in installing heat pumps should work to become a participant in the Mass Save Heat Pump Installer Network. More information can be found here: <https://www.masssave.com/learn/partners/heat-pump-installer-network>

f. If a basement is finished but unheated, do you consider it to be conditioned space?

Site specific conditions would inform any technical considerations and should be discussed with the customer when developing an overall efficiency improvement plan. Often, based on existing mechanical equipment and/or distribution systems located in the basement, the space may get significant heat through equipment and/or distribution system losses.

g. If a single windowpane is noted on the energy assessment, but no weatherization upgrades, does the homeowner need to replace the window even though it was only recommended?

No. For purposes of satisfying the weatherization requirements for rebates like the whole-home offer, the requirement is specific to completing insulation and air sealing. A customer with no weatherization recommendations who has single pane windows would not need to upgrade their windows to qualify as weatherized.

HEAT PUMPS

1. General

a. Do we still need to integrate the system to achieve the partial incentive?

Yes. Oil, propane, and gas customers pursuing the partial-home air source heat pump rebate need to install integrated controls. Electric resistance customers do not.

b. If someone qualifies for the Income Verification GSHP incentive of \$20,000, will they also qualify (receive both) for the \$15,000 whole-home rebate incentive? Or is it one or the other?

It is one or the other, not both.

c. Is there any consultation provided as to the cost of operating these different types of systems beforehand?

Details on operating costs can be found using the heating comparison calculator found here: <https://www.masssave.com/en/saving/heating-comparison-calculator>

d. Is there a consulting session beforehand to educate customers about the cost of operation?

Details on operating costs can be found using the heating comparison calculator found here: <https://www.masssave.com/en/saving/heating-comparison-calculator>

Additionally, customers can utilize the heating & cooling consultations: <https://www.masssave.com/en/heatpump/hvac-specialist>

e. We have worked in many homes that cannot afford to add multiple ASHPs but have been told by an auditor that they can receive up to \$10,000 in rebates. You can't integrate two mini splits in a whole-home and be comfortable.

The \$10,000 rebate is only eligible when the home is fully replacing their existing system. Homes pursuing a partial-home rebate must use integrated controls if the existing system is oil, propane, or natural gas. If a customer is only installing heat pumps in one zone of the home, they may integrate that heat pump with the existing system's zone and receive the \$1,250 per ton partial-home rebate. Energy Specialists will be required to complete a heat pump training to help educate them on the technology and installation opportunities.

f. Does Mass Save continually examine the limitations of heat pumps in very low temperatures? On the ground the efficiencies drop off adding high electric consumption and weather can limit work in the field to repair (being outside rather than a cellar).

The Mass Save Heat Pump Qualified Product List requires 58% (or 60% for central heat pumps) capacity ratio between the AHRI rated capacity at 17 and 47 degrees. This ratio

ensures the systems are designed for cold climates and can provide adequate heat even at low temperatures.

2. Whole-Home Heat Pump Rebates

- a. When installing heat pumps for rental property for whole-home (\$10,000 rebate program) does the landlord benefit from a \$10,000 rebate for each individual unit or is it capped out at \$10,000 for the entire building?**

The \$10,000 is per account. Multi-family complexes with more than four units are not eligible for the \$10,000 rebate. Additionally, one piece of equipment cannot be incentivized for multiple accounts, i.e., if a single condenser services two units with individual accounts, that would not qualify for two \$10,000 amounts.

- b. I thought that Whole-Home Heat Pump rebates required customers to have weatherization measures completed if they are recommended at the HEA?**

That is correct. To qualify for Whole-home Heat Pump rebates, the customer needs to have completed recommended weatherization prior to or within 6 months of the installation of the Heat Pump.

- c. What level of weatherization is needed for whole-home ASHP incentives?**

Customers can qualify as sufficiently weatherized for the purposes of receiving the heat pump rebates by satisfying one of the following three requirements: 1) home was built after 2000, 2) Home previously (back to 2013) had an assessment and completed recommended weatherization work, or at that time the home was determined not to need additional weatherization, or 3) customer must have a home energy assessment and complete at least 75% of the weatherization recommendations. Customers with less than \$1,000 of weatherization work recommended during the assessment will be considered sufficiently weatherized to access the heat pump rebate.

- d. Must weatherization always be done prior to a whole-home heat pump installation?**

Please see the answer to question #2b.

- e. With the whole house heat pump initiative, is there any goal to help absorb any of the long-term cost to the customer to run such equipment? Heat pumps are great, but they do get very expensive to run.**

No. Except for natural gas, using heat pumps for heating is on average cheaper or cost-competitive with oil, propane, or electric resistance. Customers will see their electric bills go up in the winter, but the costs should be offset by a reduction in oil or propane bills. Of course, if the home previously did not have AC and the customer is using the systems for cooling in the summer, that will have an additional cost that they did not previously have. If the home previously used window ACs, they should see reduced energy costs in the summer. As such, the Mass Save Sponsors strongly encourage/require--depending on the rebate--weatherization so that customers can see achieve optimal cost savings.

f. Do whole-home heat pump projects require a block load or manual J?

The Mass Save Sponsors do not require submission of load calculations to receive the rebate, but it is an expectation that contractors are performing load calculations to ensure the systems are properly sized to maximize comfort and efficiency. Contractors are required to follow all local state and federal code requirements.

g. If a customer completed the whole-home heat pump in January while this program was still being worked out, can they still apply for the \$10,000 rebate assuming all other requirements are met.

Yes, the whole-home heat pump rebate went live Jan 1, 2022. Weatherization was only required for installations completed after April 4, 2022.

h. Will the 10k Rebate be available for each unit of a multi-family home?

Units in a multi-family complex of more than four units will not be eligible for the whole-home rebates. Customers in a complex with 1-4 units will be eligible for a whole-home rebate for each unit provided they are individually metered, each unit is served by its own independent system (i.e., condenser), and each unit has been sufficiently weatherized.

i. Are per unit rebates available for buildings with more than 4 units in them? Example: six family building and landlord wants to go heat pumps exclusively and not use the old heating systems at all. Does this qualify for a \$10,000 rebate or a \$60,000 rebate?

Please see the answer to #2h above.

j. To confirm \$10,000 whole-home can be up to 4 units if they have individual heat pumps and their own meter?

The rebate is not to exceed the purchase price. Rebates up to \$10,000 are available for each individually residential metered account up to four units. For multi-family eligibility, please refer to question #2h For specific customer eligibility questions, please reach out to HVAC@MassSave.com.

k. Whole-home rebates do not require any integrated controls, correct? Not even for existing being used for emergency

Correct. Whole-home rebate customers attest by signing the whole-home verification form that the existing system has been either removed, disconnected, or will only be used in an emergency, i.e., if the heat pump is inoperable.

l. When sizing a heat pump for a whole-home solution how do you address the delta between the heating and cooling BTUs needed? Has there been any thought to sizing a heat pump for the heat loss? Are you concerned about the duct sizing supporting this difference for a large portion of customers?

The Mass Save Sponsors' whole-home solution allows for 90-120% of peak heating load to be met. Contractors should conduct a Manual J to ensure appropriate sizing.

- m. We have been told if a customer had an HEA with no weatherization recommendations that we can submit the HEA report to qualify for the whole-home rebate. Why are we receiving notices requesting the reps 'create' a certificate?**

We are actively working with the rebate processor to address this issue and to ensure that an HEA report with no weatherization recommendations will qualify the customer for the heat pump rebate.

3. Weatherization

- a. Can we make it acceptable to install heat pumps prior to weatherization?**

We will allow customers to complete the weatherization requirement within six months of the heat pump installation. Customers applying for the whole-home heat pump rebate amounts without having completed weatherization will be paid out at the \$1,250 per ton amount until weatherization is completed after which they will be paid the remainder of the whole-home incentive.

- b. If a homeowner is fully replacing his existing heating system with ASHP's and DOES NOT need weatherization are they still eligible for the rebate?**

Please see the answer to question #2c above.

- c. If they are unable to insulate the homes because of roadblocks are they still eligible for the rebates?**

For whole-home customers, they must complete at least 75% of the weatherization recommendations to be eligible to receive the rebate. The Mass Save Sponsors offer 75-100% coverage on weatherization work, zero interest financing, and barrier mitigation assistance to help customers complete weatherization. Customers doing a whole-home conversion who do not complete weatherization are still eligible for the partial-home rebate amounts.

4. Qualified Products

- a. Where is this list posted?**

The Heat Pump Qualified Product List can be found here:

<https://www.masssave.com/saving/residential-rebates/heat-pump/heat-pump-qualified-list>

The Mass Save Heat Pump Installer List can be found here:

<https://www.masssave.com/en/learn/find-a-heat-pump-installer>

- b. The Mitsubishi Hyper Heat Ducted equipment does not qualify for the big rebates but Non-Hyper heat equipment does. Is this going to get fixed?**

Only a small handful of certain capacities of the Hyper Heat system equipment does not qualify.

The qualified product list is based on AHRI testing data. This may be addressed as AHRI moves to V.2 of their efficiency ratings.

- c. With the 2023 DOE changes in energy efficiency minimums, are the Mass Save Qualifying Product List's energy efficiency requirements going to change? If so, do you have any insight on what the requirements are going to be for qualifying equipment?**

The Mass Save Sponsors are currently reviewing information and will be updating the requirements in the coming months.

- d. When will the correct Higher Efficiency Mitsubishi Ducted equipment be put on the list? Right now, only non-hyper heat ducted equipment is eligible.**

Please see the answer to question #4b.

5. Heat Pump Installer Network (HPIN)

- a. Is there a list that shows what installers are approved to install heat pumps?**

The Mass Save Heat Pump Installer List can be found here:

<https://www.masssave.com/en/learn/find-a-heat-pump-installer>

- b. The HPIN contains installers for at least three heat pump types (ASHP, GSHP, A2WHP). The Ratepayer looking for a contractor cannot sort the HPIN list to find installers specializing in the type of heat pump they desire. How quickly can this be fixed?**

We are currently working on this and hope to have this added functionality available soon.

- c. Does the heat pump installer have to do individual training with each manufacturer?**

Air Source Heat Pump Installers must provide certification of Cold Climate Sizing and Design Training by a heat pump manufacturer. Only one manufacturer training is required.

- d. What if you're a heat pump installer already registered and not on the heat pump installer list?**

Our website list is updated weekly. If you have completed all the required steps and your name does not appear on the web listing within two weeks, please contact

HVAC@MassSave.com

- e. Will GSHP trainings be added to the HPIN training series?**

The current Mass Save HPIN trainings are general heat pump trainings applicable to ground and air source systems. The trainings are designed to provide guidance on system design, operation, sizing, and weatherization.

f. Is MeasureQuick still a requirement for 2022?

The MeasureQuick training is not a required training for the Heat Pump Installer Network. However, contractors who complete the MeasureQuick training are eligible to receive the same MeasureQuick testing incentives that were available through the program previously for performing in field tests. We will also continue to provide the tool reimbursement to contractors completing three in field tests in a year.

g. Who should be contacted if the information on the HPIN page needs to be updated for phone number or email?

You can email HVAC@MassSave.com.

h. Is there a direct link/ information to become a certified HPIN installation contractor?

<https://www.masssave.com/learn/partners/heat-pump-installer-network>

i. Will there be any allocated workflow through the Heat Pump installer network? Or will we find our own customers?

Customers are directed to the Heat Pump Installer List MassSave.com via marketing materials, rebate forms, during Energy Assessments and through other customer interactions. There is no formal referral process to individual contractors beyond this process.

6. Qualification Criteria for Rebates & Incentives

a. If someone is in the process of their installations and will finish their install sometime in May or June, can they get the \$500 bonus already for partial-home?

The bonus is only available for customers who have completed weatherization in 2022 and completed a partial-home heat pump install within the same year. If those criteria are met, the customer would qualify.

b. Is an audit required for partial-home heat pump rebates and incentives?

No, not unless the customer is planning to use the HEAT Loan or pursue the \$500 weatherization bonus.

c. If a single-family homeowner has a family room in the basement that does not currently have a source of heat or cool in the family room, is there a heat pump rebate for which they would be eligible?

No. To qualify, the heat pump must be displacing an existing oil, propane, natural gas, or electric resistance baseboard heat source.

- d. Are there incentives available for customers who currently have partial-home heat pumps supplementing electric heat who want to add heat pumps for whole-home heating? With regards to heat pump incentives does the customer need to complete all weatherization recommendations or would a partial completion of recommendations qualify for it if a roadblock or finances stop part of work**

If a customer currently only has heat pumps in a portion of the home and is looking to displace the remainder of their electric resistance heat with heat pumps, they would be eligible for the partial-home rebate. Partial-home rebates do not require completion of weatherization; however, the completion of weatherization should always be encouraged. For whole-home customers, they must complete at least 75% of the weatherization recommendations. The PAs offer 75-100% coverage on weatherization work, zero interest financing, and barrier mitigation assistance to help customers complete weatherization. Customers doing a whole-home conversion who do not complete weatherization are still eligible for the partial-home rebate amounts.

- e. If customer lives in a condo (that they own, not a rental), and they replace their existing fossil fuel heating system with and ASHP are they eligible for a whole-home incentive?**

Customers in single family homes or complexes with four or less units, are eligible for the whole-home offer. Customers in multi-family complexes with more than four units are not eligible for the whole-home offer but may receive the partial-home rebate amount for whole-home conversions.

- f. Can you get a rebate for more than 1 heat pump?**

The whole-home heat pumps rebate is based on the account and not the number of condensers. An 800 sq ft. home with one condenser and a 4,000 sq ft. home with four condensers are eligible for the same \$10,000 rebate. Partial-home rebates are based on tonnage and the total rebate amount is not to exceed \$10,000 which is eight tons. This could be four, 2-ton condensers or two, 4-ton condensers.

- g. In reference to heat pump rebates, in a town that has a municipal electric company - can customers still get partial-home or whole-home rebates for heat pumps if they are a natural gas customer?**

Customers in a municipal electric territory are only eligible if they receive natural gas service (and use it for heating) from one of the Mass Save Sponsors.

7. Integrated Controls

- a. For Integrated controls, several customers are struggling or don't want them installed and claim they will disconnect after we set them up. Are you addressing this issue?**

If a customer currently heats with oil or propane, it is not in their financial interest to disconnect the integrated control due to the heat pumps being more efficient and cheaper to operate. Additionally, the Mass Save Sponsors inspect a percentage of rebates prior to payment issuance to ensure that the rebate applied for is installed.

b. There are situations where integrated controls would not be practical or apply, then what?

You can contact our technical assistance vendor, ICF, at HVAC@MassSave.com for specific questions around integrated control applications and recommendations.

c. When requested for the partial rebate, an integrated control is required, are you integrating to a particular zone within the heating system?

Correct, but you can integrate more than one zone.

d. What steps do you take to ensure integrated or whole-house systems continue to run the way specified in the residential programs?

New this year, the program will be looking at the electric usage of customers who have received heat pump rebates to ensure the systems are being used as intended in the heating season. This will help inform if changes to program design are needed.

8. Heating & Cooling Customer Consultations

a. Who are the HVAC consultants?

The Mass Save Sponsors HVAC technical assistance vendor, ICF, handles the heating and cooling consultations.

b. Who will be providing the heating & cooling consultations for customers?

Please see the answer to question 8a

c. Who is on the heating cooling consultation program and how does one participate?

Please see answers to question 8a.

Customers can schedule a consultation here:

<https://www.masssave.com/en/heatpump/hvac-specialist>

d. For the customer portal that allows pre-conversations, who is qualifying the HVAC Specialist? Also, without even seeing a house, it's often very difficult to recommend options. I'd think that those specialists should be very vague in their approach.

Please see the answer to question 8a.

The consultations are not a substitute for working with an HVAC contractor to discuss system sizing and design but simply an opportunity for customers to ask general questions about what options and incentives are available to them based on their existing systems.

- e. Can you share the phone number for customers to reach out and talk to someone one on one about their home?**

Customers can request a Heating and Cooling Consultation on the Mass Save site here:
<https://www.masssave.com/en/heatpump/hvac-specialist>

9. Miscellaneous

- a. What is the "peak heating load" mean?**

The systems should be sized to meet the heating load of the home on the coldest winter days. More specifically, the system should be sized appropriately using a Manual J calculation.

- b. Has there been any thought to sizing a heat pump for the heat loss which many times is impossible with one system and doing a Manual J load calculation making that heat pump now too large in the summertime due to the cooling load being smaller?**

The Mass Save Sponsors' whole-home solution allows for 90-120% of peak heating load to be met. Contractors should conduct a Manual J to ensure appropriate sizing.

- c. When a customer has a modulating 95% natural gas heating system of 97% furnace what if any would be the annual savings by going to HP installations**

The annual cost savings would likely not be present but there would be greenhouse gas emissions savings. While we have tools that can help customers make informed decisions, it is ultimately up to the customer to determine what their priorities are (cost, emissions, reduction, efficiency, etc.) and what system will work best for their needs.

- d. Why not have the cut off temperature be the same for propane, oil, and gas systems at 15 degrees? With the costs of propane, oil, and gas so high, it certainly costs less to operate high efficiency heat pumps.**

These cut off temperatures were developed by our engineering teams and are designed to maximize cost savings and efficiency. These recommended switch-over temperatures will continue to be reviewed and may change based on fuel prices.

- e. Why does the propane change over temperature for heat pumps 15 degrees while natural gas and oil is 30 degrees?**

Please see the answer to question #9d.

- f. If I am installing the heat pump coil on top of an existing furnace for the customer to get a \$10,000 rebate, how should I disable furnace heating?**

Disabling the furnace is not a requirement to access the rebate. Rebate requirements can be found here: <https://www.masssave.com/-/media/Files/PDFs/Save/Residential/rebate-forms/Mass-Save-Whole-Home-Heat-Pump-Verification-Form.pdf>

- g. What is being done to streamline the process when a house doesn't need weatherization work and the whole-home rebate requires a certificate of completion of weatherization work?**

If a home was constructed post-2000, has already completed weatherization work in the past, or if during a new assessment they are deemed to have less than \$1,000 total job cost in recommendations, they will not need to complete additional weatherization work. These customers will be considered sufficiently weatherized, and the information will be provided to and reviewed by the rebate processor.

- h. Is there a list of participating distributors for the ASHP water heater where contractors can get the systems, get the rebate, and then pass on to customer?**

<https://www.masssave.com/-/media/Files/PDFs/Save/Residential/Master-Participant-Contact-List---HPWHs.pdf>

- i. Is there any concern about customers that have switched over to ASHP for partial heating or whole-home receiving a much higher electrical bill before heating with heat pump?**

No. Except for natural gas, using heat pumps for heating is on average cheaper or cost-competitive with oil, propane, or electric resistance. Customers will see their electric bills go up in the winter, but the costs should be offset by a reduction in oil or propane bills. Of course, if the home previously did not have AC and the customer is using the systems for cooling in the summer, that will have an additional cost that they did not previously have. If the home previously used window ACs, they should see reduced energy costs in the summer. As such, the Mass Save Sponsors strongly encourage/require--depending on the rebate—weatherization so that customers can see achieve optimal cost savings.

- j. When doing a partial-home for the partial-home rebate, you need an integrated system, does the area being heated by a zoned section of the boiler/furnace need to be integrated?**

This varies depending on the integrated control being used, but yes, typically you will need to integrate the systems by each zone of the pre-existing system.

- k. Are you going to allow ducted ASHP to be installed in unconditioned attics?**

Equipment should be installed according to manufacturer guidelines and industry best practices. Coordination with the Home Energy Assessment offering is encouraged to ensure the site is adequately insulated.

l. Can you put an aggregate of customer reviews for the companies listed on the HPIN list?

The Mass Save Sponsors do not currently offer this functionality and it is not part of the Sponsors' plans at this time.

m. If a customer has natural gas heat, but municipal electric, are they eligible for the whole house mini split incentive?

Yes, if they heat their home with natural gas through one of the Mass Save Sponsors, they are eligible for the Heat Pump rebates.

REBATE PROCESSING

The Mass Save Sponsors acknowledge there have previously been some delays in processing times. The Mass Save Sponsors are actively working with the Rebate Processing Vendor on enhancements, and expedited payment pathways which we hope to resolve this summer.

For rebate payments, there are three available options:

- Customer submits downstream rebate post-installation via online or mail in and receives the rebate directly.
- Contractor becomes an eligible Third-Party Rebate Payee Designee, offers the rebate to the customer as an instant discount, and then submits for reimbursement via the downstream process.
- Heat Pump Installation Network Contractors can sign up to participate via the Direct Install Pathway. The incentive is offered as an instant discount to customers, and contractors will be reimbursed in two weeks for all complete submissions. This enhancement is coming soon.

1. Is there a portal for contractors to see all applied rebate applications?

Rebate status can be viewed here: <https://rebatestatus.portal.poweredbyefi.org/marebates>

2. We were told that when entering the program, the pay would be faster, but it is longer, and a lot of time is wasted calling to find out when the customer or myself will be getting the rebate.

The expedited payment for HPIN contractors is still being finalized. We anticipate the expedited payments to be available within the June timeframe. More information will be communicated on this delivery path as soon as it is available.

3. Will the rebate process be improved? I know some customers are waiting much longer than 8-10 weeks for the whole-home rebate checks.

Yes. The Mass Save Sponsors are actively working with our rebate processor on ways to decrease the time for processing and payment for complete submissions.

4. Is there an update on residential rebate payout? If the contractor is an eligible verified designee for the rebate, how long is the reimbursement time to the contractor?

Currently the processing time is six to eight weeks. Contractors in the HPIN will be able to receive payment in two weeks once the expedited payment process is live.

5. Is there any incentive to the contractor for offering to be an eligible verified designee for the rebate?

Contractors have the option to sign up to be an eligible verified designee for the rebate if they wish to offer the customer the benefit of an instant discount. If the contractor is part of the Heat Pump Installer Network, they may opt to sign up for the direct incentive path which provides a shorter rebate processing time for contractors.

6. When will the direct contractor rebate pathway be active for HPIN contractors? Will contractors have a separate avenue for applying or is it the same as customers?

The expedited payment for heat pump rebates, available to HPIN contractors is still being finalized. We anticipate the expedited payments to be available within the June timeframe. There will not be a separate process for submitting the rebates.

7. I am in the HPIN network and have carried the rebates for some of my customers and it is taking a long time to get rebate payments, which we were told would be more streamlined and faster.

Please see answer to question #6.

8. We are experiencing many returned rebate applications because they do not include a certificate of completion when none were noted at the energy assessment. What can we do to avoid this?

If a customer did not have any recommendations, the Home Energy Assessment report noting no weatherization recommendations should be submitted in place of the certificate of completion.

9. When will there be a contractor only communication pathway for issues with rebates?

Customers can check the status of their rebates using the portal. Please refer to Question #1. Other general rebate inquiries can be sent to ask@efi.org, or 800-232-0672.

10. Can you give us an estimate when the third-party contractors could receive rebate payments within two weeks?

Please see answer to question #6.

The expedited payment pathway for HPIN contractors will be offered for heat pump rebates only. If a contractor wishes to offer an instant discount for all other HVAC, contractors will need

to be a verified 3rd party rebate designee, and the rebate process follows the normal downstream channel and timeframe for complete submissions.

11. Is there an updated timeline of when whole-home rebates will be out? We're going beyond the stated six to eight weeks without payment to us or customers at this point.

Yes, we are actively working with the rebate processor to improve the process and resolve delays.

12. When processing rebates for customers as a HPIN contractor, what assurance does the contractor have they will receive the rebate within two weeks?

Compliant and complete rebate submissions are designed to be paid to HPIN contractors for heat pump rebates within a two-week timeframe for contractors participating in this delivery path.

13. Is the rebate processing center going to get away from the automation or are they working to improve it?

Yes, we are actively working with the rebate processor to improve the process and resolve delays.

14. Is the rebate also a direct payment to the contractor?

HPIN contractors participating in the direct incentive pathway will provide the heat pump rebate amount to the customer as an instant discount and the Mass Save Sponsors will provide the incentive amount directly to the contractor via our rebate processing vendor.

15. I have submitted several invoices for Mass Save rebates and some have come back to me. Do you have example invoices to show how you would like the invoices to look? Can you please clarify how invoices need to be submitted for oil, natural gas, and propane products? I was told recently that equipment can no longer be combined with installation costs as a single line item.

Contractor invoices must include the company name, installation date and address, outdoor and indoor equipment model numbers, integrated control model numbers (if applicable), and must be marked paid in full or otherwise indicate the sale is complete. If a customer is requesting rebates for more than one system, the invoice must include costs itemized per system.

An example of a heat pump invoice that satisfies all requirements can be found here:

https://www.masssave.com/-/media/Files/PDFs/Partners/Sample-HP-Invoice_MiniSplit_Notes.pdf

16. I am part of the HPIN network, and I hold some of my customers rebates because they cannot afford the extra \$10,000. Why does it take so long to get the rebate?

Please see answer to question #6 and #11.

INCOME BASED OFFERS

- 1. If there is a low-income renter who is interested in the electrification program / weatherization opportunities, but receives some form of fuel assistance or discounted utility bill, do they still qualify? Or are they not a target?**

Customers who are on the discount rate are eligible for services via the Income Eligible Program. Recommended weatherization improvements offered via the Income Eligible program are provided to customers at no cost. Electrification opportunities will be explored with the property owner, and applicable incentives may vary.

- 2. Will customers still have an option to apply for enhanced incentives via phone if they don't have internet access? We noticed the phone process was removed from the website.**

Yes. There is an option for customers to start the income verification process over the phone if they do not have access to the internet. The phone number is (888) 714-3990.

- 3. Are the Income Qualified Enhanced Incentive Offers only for weatherization or does it go toward a new system?**

Enhanced incentive offers for income qualified customers are available for weatherization, pre-weatherization barrier mitigation, and heating equipment. The income-based offers pages on MassSave.com will be updated accordingly in the upcoming month. The Mass Save Sponsors anticipate that the pre-weatherization and heating equipment incentives will be available in June.

- 4. Income Qualified Enhanced Incentive Offers - are these for weatherization upgrades only?**

Please see above response to #3.

- 5. For the moderate income heating and cooling incentives, how will they be administered? Will it be paid out eight weeks after like the existing rebates?**

Heating and cooling incentives are administered via our downstream rebate process. However, the Mass Save Sponsors are working with the Heat Pump Installer Network to offer a direct-to-contractor incentive to expedite the payment process for heat pump rebates. Contractors can also sign up to be a verified 3rd party rebate designee to offer an instant incentive to customers on all other eligible HVAC installations.

- 6. Do contractors need to register to participate in income qualified rebate programs?**

Customers must complete income verification and be deemed eligible to qualify for the enhanced incentives for moderate income. HVAC installations are open market, and any contractor can provide services to a moderate-income customer. Qualifying income eligible customers (60% or below state median income) are offered recommended improvements at no cost via our Income Eligible Program. Contractors must participate with the Lead Community Action Agencies if they are interested in providing services in this program.

7. Won't most customers have heat assistance if they qualify for the income based 100% incentive?

Most customers that are on the discount rate also receive fuel assistance, however, if a customer is 60% or below statewide household median income, they may or may not be receiving fuel assistance. Screening for the utility's discount rate, and eligibility for fuel assistance are two different screening processes. Customers that are on the utility's discount rate, or that qualify as being 61-80% of the statewide household median income will both qualify for a 100% insulation incentive.

8. Regarding enhanced incentives: Some customers don't have smart phones either, or are not technically savvy, and the lack of a phone application seems to add barriers for application for customers to access this incentive. Could this be changed?

There is an option for customers to start the income verification process over the phone if they do not have access to the internet. The phone number is (888) 714-3990.

9. Should Income eligible customers continue to be directed to their CAP agency for income verification or to CLEAResult's new income verification portal? Is the new portal only for enhanced incentive income verification?

Customers who believe they qualify for the Income Eligible Program (60% or below state median income) should still be referred to their local CAP agency for services. There are income guidelines on the Mass Save website to help guide customers (<https://www.MassSave.com/en/saving/income-based-offers>). If customers are not sure, they should refer to the income verification portal for screening and they will be routed to the appropriate offer.

10. Is there a pathway for low income/fuel assistance clients to use the enhanced incentives and get a HES 1-4 family assessment?

Income Eligible qualifying customers should participate through the Income Eligible Program as they are eligible for recommended services at no cost.

11. I think it's important to broach the topic [income qualifying offers] prior to the audit. If folks are income eligible, they should be served by their local agency and ought not have to be audited twice.

Customer Service representatives screen customers for discount rate eligibility before scheduling an assessment. If they are on the discount rate, they are routed to the Income Eligible Program. Otherwise, the customer service representative discusses the available income qualifying offers and provides the customer with additional information on how to get verified if they believe they may qualify.

12. Is there any way to verify the customer is income eligible? If they receive fuel-assistance and they don't tell us, we may get stuck.

Customers who are on the discount rate are eligible for services via the Income Eligible program. Customers who are not on the discount rate but believe they may qualify for an income-based offer should use the income verification portal to determine eligibility.

OTHER MECHANICAL EQUIPMENT

- 1. Why would you promote installing new oil or propane systems, when they are so terribly expensive to operate? If we are truly concerned with costs for lower income customers, we should be incentivizing ONLY high-efficiency heat pumps for customers!**

The Mass Save Sponsors recognize the challenges faced by customers living with income limitations, which is why for the income qualified enhanced and income eligible programs we provide significant or full incentives across multiple heating fuels, as electrification may not always result in the lowest operating cost for these customers. We are concerned about operating costs which is why incentives for all common fuels are offered. The Mass Save Sponsors are also required to offer certain oil and propane incentives as directed by the Department of Public Utilities.

- 2. What is the standard rebate regarding natural gas furnaces?**

- \$200 for a Natural Gas Furnace w/ ECM >95% AFUE
- \$950 for a Combined Condensing Furnace w/ ECM w/ On-Demand DHW >97% AFUE

- 3. The new requirement to have an audit prior to installation of the new high efficiency equipment has not been communicated to our contractors. Is this for gas to gas only? What about oil to gas?**

To access the higher Tier 2 rebate level for a non-condensing to condensing boiler/furnace (oil to gas, or gas to gas), a home energy assessment is required since the existing equipment needs to be verified.

- 4. A customer going from all electric to propane, is that the \$200 rebate or not eligible at all?**

The \$200 Propane Furnace w/ ECM >95% AFUE rebate would apply.

- 5. An earlier slide during the contractor presentation suggested up to \$6,000 rebates for oil boilers with weatherization effective June 2022, however, you don't show an oil boiler rebate on a later slide, please clarify.**

The "\$6000" reference was to income qualified enhanced incentives; the standard (market rate) incentives do not include an oil boiler rebate for 2022-2024.

- 6. Why was the \$400 rebate for the natural gas indirect water heater removed?**

The Mass Save Sponsors must maintain cost-effective programs. Measures are reviewed on an ongoing basis and are adjusted based on their cost-effectiveness. As a result, the natural gas indirect water heater rebate was removed as not being cost-effective.

7. Is there a rebate for oil to propane conversion?

Rebates are available for efficient propane equipment. Rebate amounts and eligibility can be found at www.MassSave.com/rebates.

8. Is an audit required for tier 2 rebates from non-condensing to condensing?

To access the higher Tier 2 rebate level for a non-condensing to condensing boiler/furnace, a home energy assessment is required since the existing equipment needs to be verified.

HEAT LOAN

1. Are you offering \$25,000 loan per meter in a multifamily home? (single owner).

HEAT Loans are available to individually metered residential accounts. For more information on HEAT Loan eligibility, please visit MassSave.com/HEAT Loan. For specific eligibility questions, please contact, 866-527-7283, and select the option for HEAT Loan.

2. How about electric panel upgrade costs associated with the transition to the all-electric home? Are there incentives for this too?

There are no incentives for electrical panel upgrades, but those costs up to \$5,000 can be financed on the HEAT Loan.

3. Can a client apply for the HEAT Loan for a partial offset install without integrated controls? They know they will not be receiving a rebate.

That would not be eligible to finance using the HEAT Loan.

4. Does the up to \$50,000 HEAT loan take into consideration the installation of the GSHP and the costs for the closed-loop distribution system?

The Mass Save Sponsors are aware of the cost of GSHPs, and at this time, with the rebate and known costs. We believe this will address installation costs. The Mass Save Sponsors will review periodically and can revisit thresholds as needed.

5. Can contractors have access to the HEAT loan application questions to be able to help customers filling the application?

The HEAT Loan Authorization form is completed during the HEA by the Energy Specialist, the other section is to be completed by the loan applicant, and asks for name, address, email and what they intend to use the HEAT Loan for (weatherization, HVAC, replacement windows, etc.). The actual loan application varies by bank.

6. When does \$50,000 HEAT loan get rolled out, and what is the process for applying?

The Mass Save Sponsors are working on finalizing the details to roll out the higher cap for heat pumps financed via the HEAT Loan. The Mass Save Sponsors hope to have HEAT Loan related website updates launched soon. More information will be communicated as details are finalized.

7. Can the heat loan include removal of old heating equipment, oil tanks etc.?

No. Proposals should be itemized to show the cost for ineligible work, including removal or replacement of an oil/propane tank, installation of a humidifier, electronic air cleaner or an air filtration system. Those costs will be deducted from the loan total on your Authorization Form.

8. Is the HEAT loan available for a system that is on the heat pump qualified products list but not installing the Integrated Control Package?

If a partial displacement is being done, and no integrated controls are being installed, that equipment is not eligible for the HEAT Loan.

9. We were advised by Mass Save and Eversource that if a customer has a municipal utility of any kind, they were not eligible to participate in the HEAT loan or rebate incentives. The previous answer was counter to that. Thank you.

Customers with municipal gas or electric service who also receive energy from a Mass Save Sponsor are eligible for HEAT Loan. No other utility service (for example: municipal water) implies or limits incentive eligibility.

10. If customers use a HEAT Loan this year for whole-home heat pumps before the additional \$25,000 is approved, and it's approved later, do customers have future access to additional HEAT Loan money for non-heat pump financing?

Yes.

MARKETING

1. What about mailers?

Direct mail, including letters post cards and other forms of mailed collateral, would be done at the individual Sponsor level.

2. Are there any funds for heat pump installer marketing?

No. Dividing the marketing budget amongst many parties would be detrimental to achieving our shared goal of driving heat pump engagement. The fragmented message would lead to customer confusion, deterring customers from acting. Today, our multi-faceted campaigns, particularly when bundled with other program marketing initiatives, result in efficiencies, allowing us to stretch each dollar farther. Splitting the funds would lead to a loss of those efficiencies and minimize the impact of each individual marketing attempt. As Sponsors of the Mass Save energy efficiency programs, we must use these funds responsibly and in such a way that we maximize customer reach and participation.

WORKFORCE DEVELOPMENT & EQUITY

- 1. To improve coverage of underserved populations would the program consider allowing HPCs to serve an entire multi-family regardless of income? Split work between CAPs and HPCs is roadblock.**

The Mass Save Sponsors are in conversations with the Low Income Energy Affordability Network to develop a procedure for contractors to serve mixed income properties. The Mass Save Sponsors will work with Lead Vendor partners to communicate any programmatic updates as they are finalized.

- 2. Why is there no participation for environmental justice communities in Franklin and Berkshire counties [Clean Energy Pathways]?**

The Clean Energy Pathways program is very comprehensive. The designated towns/cities were selected through an extensive community engagement process.

For information on Clean Energy Pathways and enrollment, please visit:
<https://www.masssave.com/en/learn/residential/clean-energy-pathways>

For information on the Community First Partnership, please visit:
<https://www.masssave.com/en/learn/partners/community-partnership>

- 3. Multi-unit buildings are creating electrical challenges, often these are in underserved communities. Will there be additional incentives to upgrade lines coming from pole to property and the individual units?**

Customers should contact customer service at their electric utility for specific questions regarding pole to property.

- 4. Could you provide the email address for the pathways program? Thank you.**

For information on how to apply for Clean Energy Pathways, please contact CEP@eversource.com or visit: <https://www.masssave.com/en/learn/residential/clean-energy-pathways>

COMMERCIAL & INDUSTRIAL

- 1. The commercial rebate website is not working. When you try to upload the documents, it states max size exceeded (this was for the rebate application).**

The Mass Save Sponsors have since investigated the functionality of the commercial rebate links. Below are three websites where commercial 'Rebates' can be submitted. All links are currently functioning properly:

- **Natural Gas Equipment & Controls:** <https://frontdoor.portal.poweredbyefi.org/initiative/marebates/program/gsmach>
- **Heat Pump Rebates:** <https://hprebates.masssaveincentives.com/>
- **MAP (all others):** <https://www.masssaveapplicationportal.com/mapstart>

2. **I've been told that the VRF units that are single phase do not qualify for 3500. A lot of my customers don't have three phase, how I'm going to resolve this issue?**

Variable Refrigerant Flow (VRF) systems must follow the AHRI Standard 1230 (and be noted on the AHRI certificate), and an individual system's cooling capacity must be greater than 65,000 btu/h to be eligible for the VRF rebate. If the equipment does not meet these requirements, then the equipment would follow the air source heat pump eligibility and rebate amount.

3. **What's the audit process for weatherization for commercial customers?**

Currently, the Mass Save Sponsors are working on updating their commercial weatherization offerings. The Mass Save Sponsors have always been able to address weatherization as part of the custom process (through the custom application), and that is the current path. The Mass Save Sponsors anticipate offering a more streamlined process within the next couple of months.

4. **Do you need a building management system?**

A building management system is not needed if a customer is going to fully replace their heating system with an eligible heat pump. If a customer is partially displacing their existing natural gas, oil, or propane heating system, then a building management system or an eligible integrated control is required to connect to the existing heating system.

5. **Commercial HPs are a little different than residential, is there going to be another qualified product list?**

The Mass Save Sponsors developed a list that is inclusive of all eligible heat pump equipment regardless of the size. This qualified products list can be found at MassSave.com/cihpql or on the MassSave.com/ciheatpump page. If there is equipment that meets the requirements on the rebate form, but is not listed on the qualified products list, please reach out to hvac-ne@energy-solution.com for confirmation of eligibility.

6. **Is the tonnage combined number of units?**

Yes, the total tonnage of equipment being installed for the project will determine which path the measure(s) will use to access incentives.

OTHER

1. **With 100,000 newly electrified houses there is a need for solar incentives, especially for those who are at or below market rate. When will there be offerings to assist with the adoption of installing renewable energy especially as rates rise?**

There are currently no incentives delivered through Energy Efficiency for renewable energy. Check your local utility's website for additional renewable offerings. Information on the state's solar program, SMART, can be found at: <https://masmartsolar.com/>

2. Please speak about the eligibility for incentives or rebates when a builder is involved in various situations: A "Retrofit" for insulation only. A renovation that is NOT utilizing the R&A Program. A "Renovation & Addition" utilizing a HERS Rater New.

- **Retrofit for Insulation Only** – Incentives eligible through the Residential Coordinated Delivery program
- **Renovation Not Utilizing R&A Program** – Energy Efficiency measures for renovations are only available via the R&A program.
- **R&A Project** – Incentives available through current R&A Program. Energy Efficiency measures for renovations are only available via the R&A program.

3. Do you have any incentives for adding renewable energy after you have electrified? Especially as rates rise!

There are currently no incentives delivered through Energy Efficiency for renewable energy. Check your local utility's website for additional renewable offerings. Information on the state's solar program, SMART, can be found at: <https://masmartsolar.com/>

4. Is there a corresponding effort to ramp up production of clean energy to go along with the aggressive electrification goals?

Information on the state's Renewable Energy Portfolio Standard can be found at: <https://masmartsolar.com/> <https://www.mass.gov/renewable-energy-portfolio-standard>

5. Retrofit v. New Construction classifications are problematic for GHSP installations. Fossil fuel displacement plus weatherization triggers new construction classification. The new construction incentive is less generous. Can these criteria change?

The new construction incentives that are currently offered are as robust as cost-effectiveness allows. We have provided very lucrative incentives for all-electric homes (including those with GSHP technologies), however the focus should be on enhancing and improving the building envelope prior to ANY electrification technologies.