

welcome.

2024 RESIDENTIAL HVAC KICKOFF PRESENTATION

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2024 RESIDENTIAL HVAC KICKOFF PRESENTATION

2023 Program Overview

2024 RESIDENTIAL HVAC KICKOFF PRESENTATION

average kW

12,351



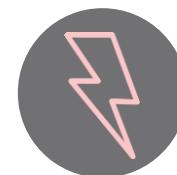
incentives paid

\$9,036,029



average kWh

26,149,143



total projects

1064



HEE prior year review

2024 RESIDENTIAL HVAC KICKOFF PRESENTATION

What's New in 2024?

2024 RESIDENTIAL HVAC KICKOFF PRESENTATION

What's New? – HVAC Program Changes

- All failure types will have an attempt to have a correction made. If a correction is made, the approved incentive amount may differ from the requested amount.
- Failures are calculated by a \$ dollar amount instead of a percentage amount. After three (3) failures, the Provider will be placed in lockout for 15 business days. Once the lockout period has been met, the provider will be unlocked and funding allocation may be reduced.
- Service Providers may now submit multiple projects per week with a maximum dollar amount of \$40K per PR. The maximum number of ESI IDs per Production Report is fifteen (15).
- All Program funding, allocations, and lockout are subject to the Program Manager's discretion.

New Process for Failures

- Divide the failed measures' total dollar amount by the total production report (PR) incentive amount requested by the Service Provider to get a percentage of the failed dollar amount.
- The percentage of the failed dollar amount will be the percentage that will be used to reduce the incentive amount for failed and non-inspected measures.



Example of New Process for Failures

2023	
Total PR \$ Amount	\$20,000
Failure # 1	\$1,000
Failure # 2	\$1,000
Failure # 3	\$1,000
Failure # 4	\$1,000
Total \$ Failures	\$4,000
PR total less Failures	\$16,000
Failure % - Total Failures divided into total PR amount	20%

Uninspected Sites \$ Value	\$11,000
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Failure Reduction % applied to Uninspected Sites	\$2,200
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Passed sites	\$5,000
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Adjusted PR minus Failures and Failure % applied to Uninspected sites	\$13,800
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2024		
\$20,000	Fixed and Recalculated \$ incentive	Comments
\$1,000	\$1,000	Fixed and Recalculated
\$1,000	\$800	Fixed and Recalculated
\$1,000	\$850	Fixed and Recalculated
\$1,000	\$0	Not fixed
\$4,000	\$2,650	Total Fixed and Recalculated Failure \$
	\$18,650	Recalculated PR total less Failures
	6.75%	Failure % = Recalculated PR total divided into total PR amount

\$11,000	Uninspected Sites \$ Value
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\$179	Failure % Reduction applied to Total Fixed and Recalculated Failure(s)
\$743	Failure % Reduction applied to Uninspected Sites

\$5,000	Passed sites
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\$17,729	Adjusted PR minus Failures and Failure % applied to Uninspected sites
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- All failures will have an attempt to be fixed
- # of failures will be tracked rather than overall percentage
- Each failure can have one to multiple reasons that cause the each failure

Example of New Process for Failures

Program	# of Failures	Result
HEE	3 or more	15 business days lockout – No access to EEPM
LIW	3 or more	15 business days lockout – No access to EEPM

- Each failure can have one to multiple reasons that cause the failure within one measure
- One PR can have multiple failures
- The lockout period may be modified at the discretion of the Program Manager

2024 Program Budget and Dates

2024 RESIDENTIAL HVAC KICKOFF PRESENTATION

HVAC (HEE & LIW) 2024 Budget & Minimum Efficiencies

Program	2024 Incentive Budget	PR Incentive Range (Weekly)	PR Submittal (Weekly)
Home Energy Efficiency	\$7,474,170	Not to Exceed \$40,000	unlimited
Low-Income	\$500,000	Not to Exceed \$40,000	unlimited

System Type	System Capacity	SEER2	EER2
A/C Split Systems	A/C < 45,000 Btu/h	14.3	11.7
	A/C ≥ 45,000 Btu/h	13.8	11.2
A/C Single Package	All Btu/h	13.4	10.9

System Type	System Capacity	SEER2	EER2	HSPF2
H/P Split Systems	All Btu/h	14.3	11.7	7.5
H/P Single Package	All Btu/h	13.4	10.9	6.7

2024 HVAC Incentive Caps by Tonnage

HEE & LIW HVAC

Tonnage	HEE Program	LIW Program
2	\$2,000	\$2,100
2.5	\$2,200	\$2,300
3	\$2,600	\$2,700
3.5	\$2,900	\$3,000
4	\$3,200	\$3,300
5	\$3,400	\$3,500

Program Funding

- **SPs can request additional funding (via email)** during the month if funding is available and their number of lockouts is less than four (4) 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 number of lockouts is less than four (4) and funding is available.
- New SPs normally start in the lowest tier but can be reviewed by the PM.
- **Funds will not be automatically added.**

HVAC Program Timeline

	Date	Event/Action
STEP 1	January 29	HVAC Program Open for Applications
STEP 2	February 8	Oncor reviews all applications and determines funding tier level for each Program Option
STEP 3		Oncor contacts each SP via email with allotted funding level for HVAC Program Option
STEP 4		HVAC Program Open for PRs

NOTE: All SPs must submit a new application each year. Applications will be available through the SP EEPM dashboard. Before submitting applications, SPs should review emails, contacts, and phone numbers for current status.

Any work or installations completed before the program opens on February 8th, will **NOT** be accepted.

Low-Income HVAC

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Low-Income HVAC

- ❑ Eligible 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



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.**

Address Verification



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

* Address:

* Meter ID:

* Confirm Meter ID:

* Residence Type:

* Utility Company:

* Service Provider:

* Service Provider Email:

Customer Name:

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

Map showing surrounding area with addresses 4105, 4107, 4109, 4111 and street name Koala Dr.

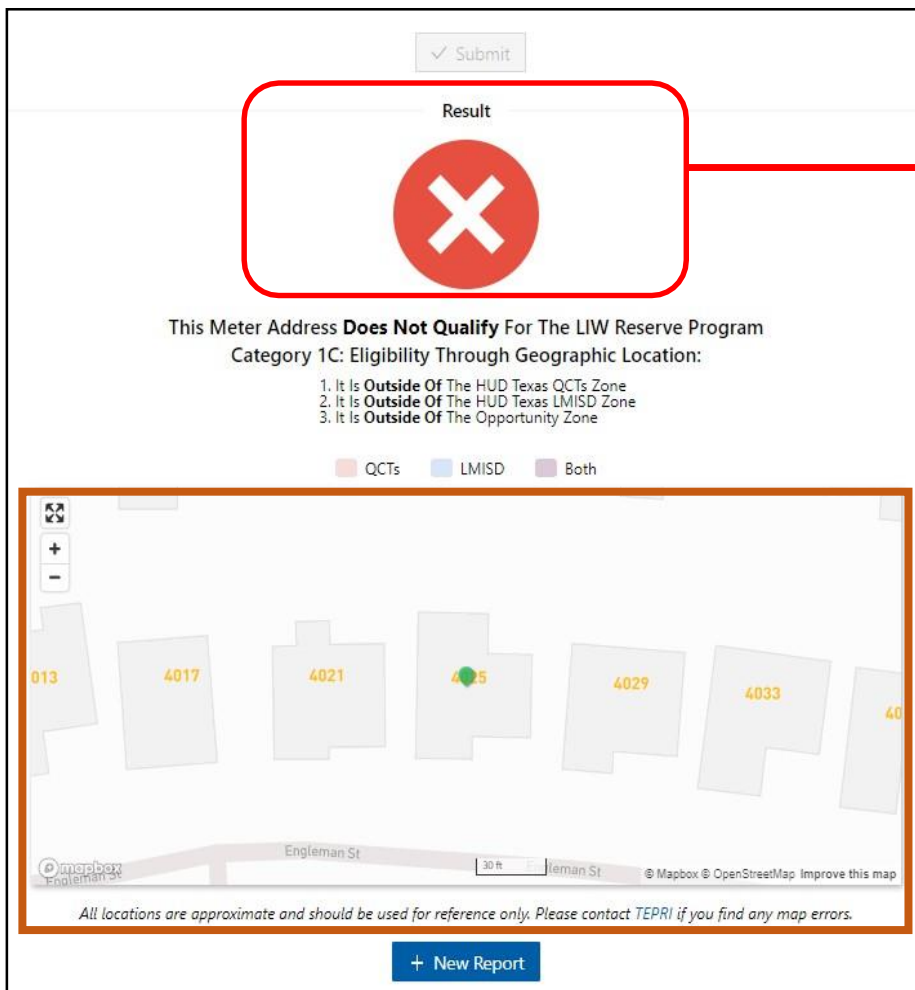
Results will produce a **"GREEN"** checkmark if the address Qualifies for the LIW Program.

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.)



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



✓ 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

Ceiling Insulation

LIW Insulation Incentives-Flat Rate

Heating Type	Incentive per Sq. Ft.	Average incentive for a 1,500 Sq. Ft. Home
Electric resistance	\$0.65	\$975.00
Heat pump	\$0.40	\$600.00
Gas	\$0.30	\$450.00

Guidelines and Requirements:

- Incentives based on Sq. Ft. rather than the existing insulation level (must accurately report the existing insulation R-Value).
- 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 you are 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

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Customer Information

Leave a copy with each customer after work is completed!

- ❑ **Email addresses** for customers are required.
 - If the email address is not available, enter na@na.com
- ❑ **“Primary Language” on the customer tab field should be populated**
 - Example: English, Spanish, Vietnamese or Other
- ❑ Customer Agreement (Electronic) 2024 Version only
- ❑ Income verification (Low Income only) (Electronic)
- ❑ Invoice from Service Provider
- ❑ Energy Efficiency Tips Brochure*
- ❑ **Use the word “INCENTIVE” and NOT “Rebate”**
- ❖ **The EE Tips brochure should be left with the customer, whether it is a sales call or an actual project.**



SP Marketing Materials

2024 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.

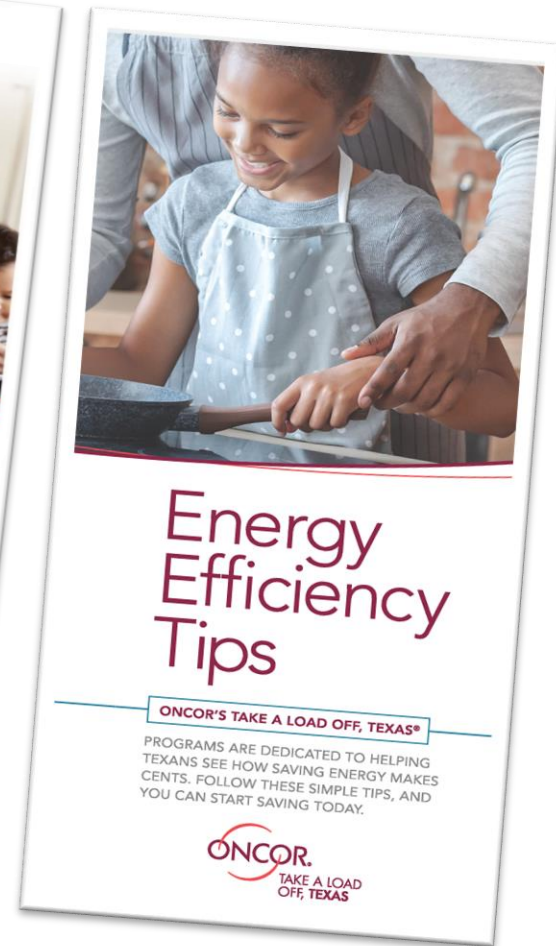
Energy Efficiency (EE) HVAC Door Hangers & Tips Brochure

ORDERING MARKETING MATERIALS

HVAC Door hangers and EE brochures can be ordered online in quantities of 200 brochures for \$28.50 per order or an English/Spanish combo pack of 300 brochures for \$28.50 per order.

ATTENTION: All SPs are REQUIRED to purchase the EE Tips brochure and leave it with the customer, whether it's a sales call or an actual project.

To order, visit: [Oncor E-Store](https://www.oncor.com/e-store)



Inspections

2024 RESIDENTIAL HVAC KICKOFF PRESENTATION

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 the site

Is Multi System Change Out? – 2 existing units are being removed, and installing 1 unit is. Or removing 1 unit and installing 2. Tonnage should be like for like.

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

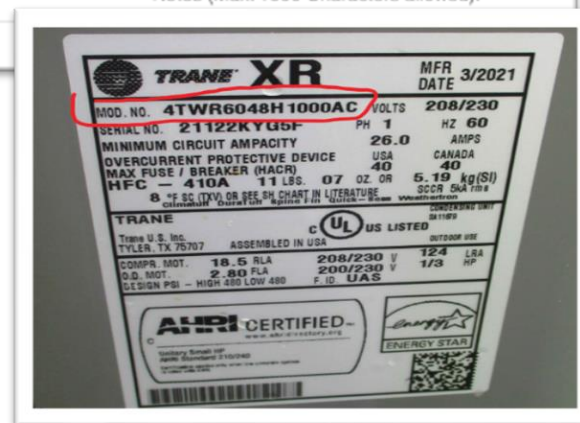
Existing Unit Name Plate Year 2001	New Unit Capacity (Btu/h) 32000	Is the replaced unit still operational? Yes	SEER-Level 18.00-20.99
Climate Zone 2	Premise Type Existing Construction	Condenser Model # 24VNA937A*030*	Condenser Serial # 3921e20616
Condenser Brand Name CARRIER	Replaced Condenser Brand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



Model Number from Condenser Label

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

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 #	Climate Zone
8331339	2
Condenser Model #	Condenser Serial #
DZ16SA0301BD	2204108772

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

MODEL DZ16SA0301BD SERIAL NO. 2204108772
A.C. VOLTS 208-230 PHASE 1 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

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 ensure that we can claim the maximum savings and pay the maximum incentive.

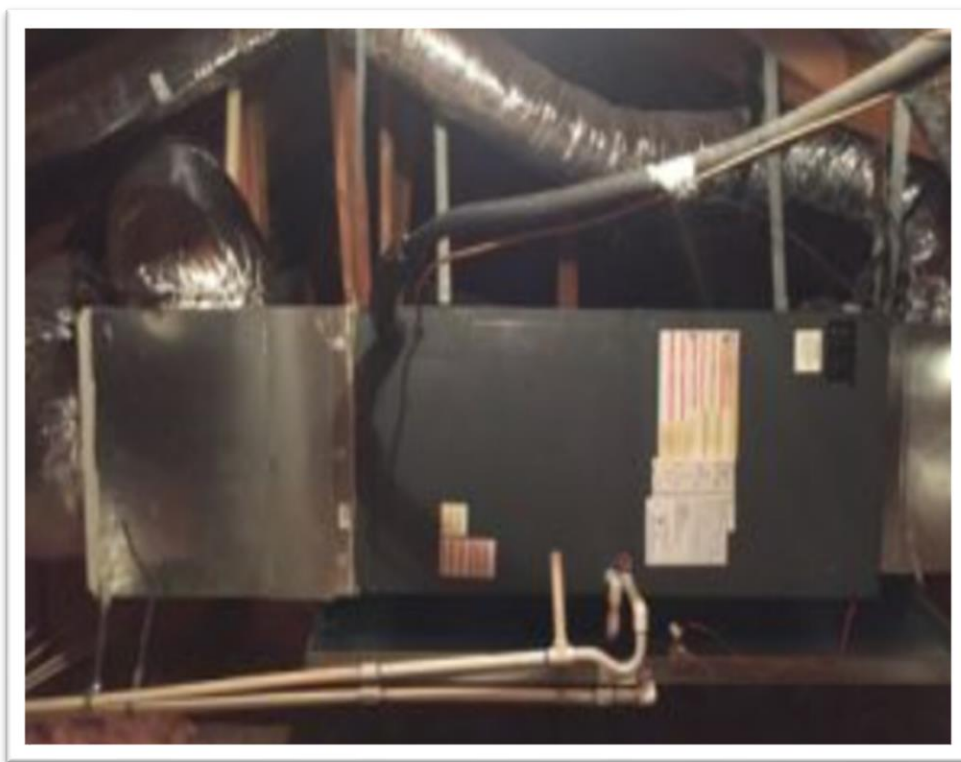
Photo Requirement - NEW for 2024

Existing and New Furnace

- A photo of **both** the existing and new furnace/air handler will be required this year for every measure submitted, regardless of the existing heating type.
- You must capture the **entire** furnace top to bottom or side to side. If you are unable to capture the entire furnace in one photo, provide two.
- A photo should be taken **prior** to the removal of the existing unit, **and** a photo should be taken **after** installation is completed for the new unit.
- Photos **must be** in color. Black and white photos **will not** be accepted.



Existing



New



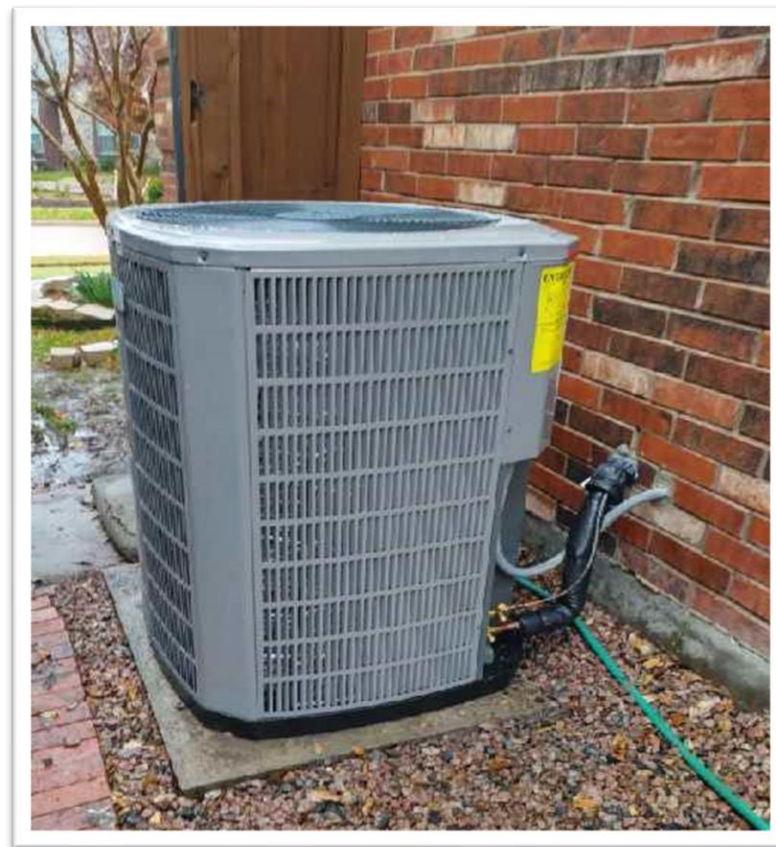
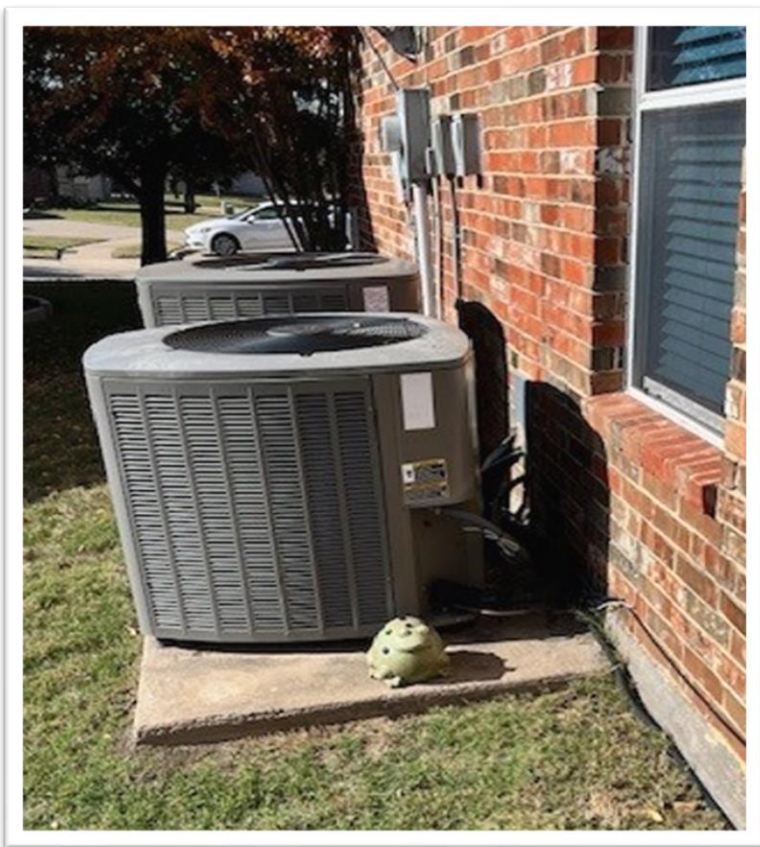
Photo Requirement – **NEW 2024**

Existing and New Condensers

- A photo of **both** existing **and** new condensers will be required this year for **every** measure submitted.
- The photo should be taken **prior** to the removal of the existing unit **and after** installation for the new unit is completed.
- The photo should be taken from a distance, indicating that the connection/installation is complete.
- Photos **must be** in color. Black and white photos **will not** be accepted.

Existing

New



Contact Information

2024 RESIDENTIAL HVAC KICKOFF PRESENTATION

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	✓		

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

Contact Us

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thank you.