

Changes Notice Summary 2021 Rate Period Implementation Manual

The following changes are effective April 1, 2022.

Documentation Requirements

LOCATION	DESCRIPTION	RATIONALE
DEFINITIONS		
0	<p>Definitions - Completion Date: For Unit Energy Savings (UES) and site-specific calculated measures, Completion Date is determined by the utility and is defined as one of the following:</p> <ul style="list-style-type: none"> a) A date within 6 months of equipment purchase; or b) A date within 6 months of the measure installation; or c) Utility's measure approval date (e.g. when a utility pays their end-user, when a utility completes a post-installation inspection, when a utility completes a measure distribution form, etc.) <p>For Option 1 custom projects and measures that follow a similar process, Completion Date is defined as the date that a COTR approves the Custom Project Completion Report. For Option 2 custom projects, Completion Date is defined as the date identified in the customer's approved Measurement and Verification Plan.</p>	Establish a consistent definition for Completion Date.
0	<p>The Basis for Savings portion for many Implementation Manual sections will be changed. For measures that are Regional Technical Forum (RTF) approved, the Basis for Savings is being simplified to be a basic description of the technology and further details are available at the RTF website.</p>	Simplification of the Implementation Manual.
0	<p>Energy Efficiency Promotion Payment Rates: BPA will retire promotional residential and commercial HVAC payments, effective March 31, 2022.</p>	This is a limited-time promotion that is scheduled to end March 31, 2022.
INTRODUCTION		
1.0	<p>Introduction language will be updated to reflect the role of the Implementation Manual as outlined in the Energy Conservation Agreement (ECA).</p>	More clearly defines the role of the Implementation Manual relative to the ECA.
1.7	<p>The COTR Request and Acknowledgement Procedure will be moved from the Multi Sector Section 12 to Section 1.7.</p>	The procedure is referenced throughout the Implementation Manual and is an administrative requirement that aligns well with Section 1.
FUNDING		
2	<p>Funding: BPA will make updates to formatting throughout the section to remove extraneous hyperlinks found within the section itself.</p>	Removing extraneous hyperlinks found in this section.
2.1.1	<p>Funding Terminology will be added as a new subsection. This will consolidate definitions for BPA funding terms which were previously located in the Definitions section or in other areas of Section 2. These terms includes: Available Implementation Budget, Bilateral Transfer, Initial Implementation Budget, Tier One Cost Allocation, and Unassigned Account.</p>	Incorporates terms and definitions only used in Section 2 into one subsection, so they can be easily referenced.
2.1.1.2	<p>Bilateral Funding: This section will be updated to reflect BPA Energy Efficiency Tracking System (BEETS) reporting and invoicing processes. This includes the removal of "eedocs@bpa.gov" as a method to submit reporting and invoicing-related documents.</p>	Align with BEETS implementation plans.
2.1.1.2	<p>BPA will clarify Inter-Rate Period Budget Flexibility (Rollover) to reflect that customers may transfer up to 10% of their initial implementation budget from one rate period to the next or up to \$50,000 of their available implementation budget, whichever is greater.</p>	Clarifies rollover amounts.
2.1.3	<p>Performance Payments: Effective April 1, 2022, performance payment rate will be based on measure or project Completion Date.</p>	Aligns the Performance Payment to when the measure will be implemented.
2.1.3	<p>Performance Payments: Performance Payments will be calculated at the measure level and summed at the project level.</p>	Simplifies calculating performance payments for projects with multiple measure lives.

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2.1.3	Performance Payments: Upon implementation of BEETS, customers may opt-in to receive performance payments during the invoicing process.	Align with BEETS implementation plans. In current reporting system, customers opt-out of performance payments.
2.1.3	Performance Payments: Performance Payment rates for shorter measure lives (1-3 years) will be capped at their incentive payment rates.	Align with direction given in the Post-2011 Implementation Program, page 18.
2.1.3	Performance Payments: Language regarding Performance Payments will be adjusted from "BPA highly recommends that customers use performance payments..." to "BPA allows customers to claim performance payments..."	Reflect performance payment eligibility rather than subjective best practices.
2.1.3	Performance Payments: BPA will incorporate language associated with capping performance payments for shorter measure lives.	Align with BEETS implementation plans.
2.2	In the Funding Sources table , the Implementation Budget description will be updated from "BPA payment in the form of EEI funding; ECA funded activities that are accepted by BPA" to "BPA payment in the form of EEI funding according to the terms of the ECA."	Previous language reflecting "ECA-funded activities" is inaccurate.
GENERAL REQUIREMENTS		
3.2	The Reporting Requirements section will be fully updated to reflect BEETS reporting requirements.	Aligns with BEETS implementation plans.
3.2	Reporting Requirements: UES measure reporting rules will be changing in BEETS. If a UES measure expires, the measure must be reported and submitted for compliance review within six months of the expiration date. If a UES measure is modified but not expired (e.g. updated documentation requirements), the measure must be submitted per the current rate period reporting requirements and will receive the payment rate in effect at the reported completion date.	The business rules for reporting UES measures must be updated with BEETS implementation.
3.2	Reporting Requirements: Non-Reportable will have a separate reporting methodology in BEETS for achieved energy savings.	Aligns with BEETS implementation so that Non-reportable will have its own reporting mechanism.
3.3	Oversight and Evaluation will become each their own section in Section 3. For Oversight, language will be slightly updated to reflect BEETS implementation.	Recognizes that Oversight and Evaluation are two separate activities with different overarching frameworks.
3.5	Third-Party Operated Programs: This section will be updated to reflect current BPA third-party offerings.	Updated to reflect BPA offerings.
CUSTOM PROJECTS		
4	Custom Projects: BPA will update the language throughout Section 4 to align with other Implementation Manual sections and to clarify Custom Project requirements.	A number of instances have been identified throughout Section 4 of inconsistent language and vague requirements. The update will make Section 4 consistent with other Implementation Manual requirements and clarify Custom Project submittal requirements. It will not change Option 1 or Option 2 Custom Project requirements.
4.3.2	Custom Projects: General Requirements Section: The following changes will be implemented: Option 1 Custom Projects must meet the following B/C ratio requirements: If the project savings are 200,000 kWh or less (800,000 kWh or less for Utility Distribution measures), no cost-effectiveness screen is applied. If the project savings are over 200,000 kWh (over 800,000 kWh for Utility Distribution measures), and the project has a BPA-approved proposal, the proposal must demonstrate that the project has a B/C ratio ≥ 0.5 based on proposed costs and savings. No additional screen will be applied at the completion report. If the project savings are over 200,000 kWh (over 800,000 kWh for Utility Distribution measures), and the project does not have a BPA-approved proposal, the completion report must demonstrate that the project has a B/C ratio ≥ 0.5 .	Clarifies benefit cost ratio requirements for Utility Distribution measures.

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CUSTOM PROGRAMS		
5	Custom Programs: BPA will reinstate Custom Programs on April 1, 2022 with a revised process. The new process will include three required phases: 1.) Prescreening, 2.) Custom Program Proposal, and 3.) Custom Program Completion. The new process will also include pre-determined documentation and submission requirements.	The addition of a prescreening phase and documentation requirements will streamline workflow and allow BPA to better meet customers needs.
AGRICULTURAL SECTOR		
6.6	Irrigation Hardware: The following offerings will expire: Gasket Replacement Replace Leaking Base Boot Gasket with New Gasket Center Pivot or Lateral Move System; Gasket Replacement Replace Tower/Span/Pivot-Flex Gasket Center Pivot or Lateral Move System; Pipe Repair Repair Leaking Pipes Wheel-line, Hand-line, or Portable Main-Line System; Sprinkler Replacements Upgrade Low-Pressure Sprinklers to Rotating Type Sprinklers Center Pivot or Lateral Move System; and Sprinkler Replacements Upgrade Impact Sprinkler to Rotating Type Sprinkler Wheel lines, Hand lines, Center Pivots or Lateral Move systems.	Deactivated by the RTF at the March 16, 2021 RTF meeting.
6.6	Irrigation System Upgrades: Savings will go up and payment will be increased for the following offerings: Sprinkler Upgrade Irrigation System Conversion to MESA from high pressure Center Pivot or Lateral Move System; Sprinkler Package Replacements LESA/LEPA/MDI Sprinkler Package Center Pivot or Lateral Move System; Sprinkler Package Replacements MESA Sprinkler Package Center Pivot or Lateral Move System; Sprinkler Package Replacements High-Pressure Sprinkler Package Center Pivot or Lateral Move System; and Sprinkler Upgrade Irrigation System Conversion to LESA/LEPA/MDI from high-pressure, Lateral Move or Center Pivot Systems.	At the March 16, 2021 RTF meeting, the RTF approved updates to the Irrigation Hardware UES measure savings justifying a higher incentive than was previously offered.
6.6	Irrigation System Upgrades: Savings will go down and payment will be decrease for the following offering: Hub Replacement Replace Thunderbird Wheel Line Hubs Wheel Line System.	At the March 16, 2021 RTF meeting, the RTF approved updates to the Irrigation Hardware UES measure savings effectively decreasing the incentive previously offered.
6.6.1	The Project Information Form (PIF) requirement for Section 6.6.1 Irrigation System Conversion: LESA/LEPA/MDI will no longer be required.	Data collection complete; form is no longer required.
6.6.3	The measure " Irrigation System Conversion: MESA " will be renamed to "Irrigation System Conversion: High-Pressure to Low-Pressure".	Updating the name of the section to encompass both the existing measure and the new measure being added.
COMMERCIAL SECTOR		
7.3	Nonresidential Lighting: BPA will add an additional available method to calculate incremental cost for new construction projects. Customers may choose to calculate the incremental cost as 2.86% of the total project cost.	Will align with Custom Project requirements and improve the ease of implementation.
7.4.1	Advanced Rooftop Unit Controls: The PIF will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
7.4.2	Connected Thermostat: The Project Information Form (PIF) will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
7.4.3	Ductless Heat Pump (DHP) Retrofit and Upgrade (BPA-Qualified): BPA will add AHRI Certificate as a documentation requirement. Will remove the Ductless Heat Pump Qualified Product List.	Will improve consistency with other Commercial heat pump measures. DHP efficiency requirements are listed in Section 7.4.3.
7.4.3	Ductless Heat Pump Retrofit and Upgrade (BPA-Qualified): The PIF will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
7.4.3	Ductless Heat Pump Retrofit and Upgrade (BPA-Qualified): BPA will update the DHP Upgrade pre-conditions to allow for the space to be conditioned by an operational or failed Air-Source Heat Pump.	Will expand the pre-conditions to account for the Air-Source Heat Pump baseline.

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7.4.4	Air-Source Heat Pump Retrofit and Upgrade (BPA-Qualified): The PIF will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
7.4.4	Air-Source Heat Pump Retrofit and Upgrade (BPA-Qualified): BPA will provide language clarification.	Will improve clarity.
7.4.5	Variable Refrigerant Flow Systems (BPA-Qualified): The PIF will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
7.4.6	Variable Frequency Drive on Air Handling Unit Fan (BPA-Qualified): The PIF will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
7.5.1	Commercial Insulation: BPA will update the pre-conditions to clarify the building's primary heating system must be electric.	Will improve clarity.
7.5.1	Commercial Insulation: The PIF will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
7.5.1	Commercial Insulation: Energy savings will be updated. See UES Measure List for specific changes. There will be no change to incentive levels.	Will update to be consistent with the RTF's revised savings.
7.5.2	Commercial Windows (BPA-Qualified): The PIF will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
7.5.2	Commercial Windows (BPA-Qualified): BPA will update the pre-conditions to clarify the building's primary heating system must be electric.	Will improve clarity.
7.6.1	Anti-Sweat Heater (ASH) Controls: Energy savings will be updated. See UES Measure List for specific changes. There will be no change to incentive levels.	Will update to be consistent with the RTF's revised savings.
7.6.2	Walk-in or Display Case Evaporator Fan Motor - Shaded Pole to Electronically Commutated Motor (ECM): BPA will update measure to include Permanent Magnet Synchronous Motors.	Will expand this measure to provide additional opportunities for uptake.
7.6.2	Walk-in or Display Case Evaporator Fan Motor - Shaded Pole to Electronically Commutated Motor (ECM): Energy savings are being updated. See UES Measure List for specific changes. There will be no change to incentive levels.	Will update energy savings.
7.6.3	Strip Curtains for Walk-in Coolers and Freezers: Energy savings will be updated. See UES measure List for specific changes. There will be no change to incentive levels.	Will update to be consistent with the RTF's revised savings.
7.7.1	Demand Controlled Kitchen Ventilation (BPA-Qualified): The PIF will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
7.7.2	Commercial Steam Cookers: Energy savings will be updated. See UES Measure List for specific changes. There will be no change to incentive levels.	Will update to be consistent with the RTF's revised savings.
7.7.2	Commercial Steam Cookers: BPA will update the date after which BPA will accept pre-existing models that were ENERGY STAR-Qualified at the time they were manufactured. Will change from October 2019 to April 2022.	Will update to align with the release of the April 2022 Implementation Manual.
7.7.3	Hot Food Holding Cabinets: Energy savings will be updated. See UES Measure List for specific changes. There will be no change to incentive levels.	Will update to be consistent with the RTF's revised savings.
7.7.3	Hot Food Holding Cabinets: BPA will update the date after which BPA will accept pre-existing models that were ENERGY STAR-Qualified at the time they were manufactured. Will change from October 2019 to April 2022.	Will update to align with the release of the April 2022 Implementation Manual.

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7.7.4	Electric Combination Ovens: Energy savings will be updated. See UES Measure List for specific changes. There will be no change to incentive levels.	Will update to be consistent with the RTF's revised savings.
7.7.4	Electric Combination Ovens: BPA will update the date after which BPA will accept pre-existing models that were ENERGY STAR-Qualified at the time they were manufactured. Will change from October 2019 to April 2022.	Will update to align with the release of the April 2022 Implementation Manual.
7.7.5	Electric Convection Ovens: BPA will update the date after which BPA will accept pre-existing models that were ENERGY STAR-Qualified at the time they were manufactured. Will change from October 2019 to April 2022.	Will update to align with the release of the April 2022 Implementation Manual.
7.7.5	Electric Convection Ovens: BPA will update ENERGY STAR-Qualification requirement from a minimum of version 2.2 to a minimum of version 3.0.	Will update to be consistent with the RTF.
7.7.5	Electric Convection Ovens: Energy savings will be updated. See UES Measure List for specific changes. There will be no change to incentive levels.	Will update to be consistent with the RTF's revised savings.
7.7.6	Commercial Electric Fryers: BPA will retire this measure on March 31, 2022.	The RTF updates to this measure leave limited opportunity for uptake.
7.7.7	Pre-Rinse Spray Valves: Energy savings will be updated. See UES Measure List for specific changes. There will be no change to incentive levels.	Will update to be consistent with the RTF's revised savings.
7.8.1	ENERGY STAR Commercial Clothes Washers: BPA will update the date after which BPA will accept pre-existing models that were ENERGY STAR-Qualified at the time they were manufactured. Will change from October 2019 to April 2022.	Will update to align with the release of the April 2022 Implementation Manual.
7.8.3	Commercial Showerheads: BPA will retire this measure.	This measure was deactivated by the RTF. Removing for consistency.
7.8.4	Generator Block Heaters (BPA-Qualified): The PIF will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
7.8.5	Vehicle Engine Block Heater Controls: Energy savings will be updated. See the UES Measure List for specific changes. There will be no change to incentive levels.	Will update to be consistent with the RTF's revised savings.
INDUSTRIAL SECTOR		
9.0	Performance Tracking System (PTS): BPA will add this new measure effective April 1, 2022 that provides incentives available only to end use sites participating in the SEM Projects measure. More information can be found at https://www.bpa.gov/EE/Sectors/Industrial/Pages/New-Energy-Management.aspx	PTS has demonstrated value in identifying and tracking SEM energy savings opportunities.
9.0	Energy Project Manager: BPA will add this new measure effective April 1, 2022 and it will be applicable to the Industrial and Commercial sectors. This measure replaces the Optional ESI Component, Energy Management: Energy Project Manager. More information can be found at https://www.bpa.gov/EE/Sectors/Industrial/Pages/New-Energy-Management.aspx	This measure will be simplified and enhanced.
9.0	Strategic Energy Management (SEM) Projects: BPA will add this new measure effective April 1, 2022 and it will be applicable to the Industrial and Commercial sectors. This measure will replace the Optional ESI Component, Strategic Energy Management Projects. More information can be found at https://www.bpa.gov/EE/Sectors/Industrial/Pages/New-Energy-Management.aspx	This measure will be simplified and enhanced.
9.2.1	Energy Management: Energy Project Manager (Optional ESI component). BPA will retire the existing EPM offering on March 31, 2022.	BPA is expiring this measure to release a new EPM measure that will be effective on April 1, 2022 and is applicable to both the Industrial and Commercial sectors.

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9.2.2	Strategic Energy Management: SEM Projects (Optional ESI component). BPA will retire the existing SEM Projects offering on March 31, 2022.	BPA is expiring this measure to release a new SEM Projects measure that will be effective on April 1, 2022.
RESIDENTIAL SECTOR		
10	Any mentions of Simple Steps will be removed from Section 10.	The Simple Steps program ended.
10.2	Residential Lighting: The RBSA room table will be moved from the "Requirements and Specifications" section and added to the "Additional Information" section for LED Lamps/Fixtures and TLEDS.	Room type is no longer a specification, but implementation guidance.
10.2.1	Residential Lighting: Residential Lighting savings and payments will change. Most savings will decrease; few will increase. Payments will all either decrease or stay the same.	The savings and payments are being updated due to RTF savings and incremental cost changes.
10.2.1	Residential Lighting: The Retail delivery channel will be eliminated for both LED lamps and LED fixtures.	WA - Due to newly adopted lighting standards in Washington state, the baseline is the efficient case. OR/ID/MT - As a result of the updated RTF savings, key lamps in the retail portfolio no longer have an incremental cost. As a result the retail delivery channel is no longer feasible.
10.2.1	Residential Lighting: The Mailed Non-Request delivery channel will be eliminated for both LED lamps and LED fixtures	The RTF no longer supports the offering.
10.2.1	Residential Lighting: LED Fixture offerings will be removed from the Direct Install delivery channel.	As a result of the updated RTF savings, BPA found the measures no longer cost effective.
10.2.1	Residential Lighting: By Request LED Bulbs will be eliminated for Washington state.	Due to newly adopted lighting standards in Washington state, the baseline is the efficient case for LED bulbs - they will be omitted from the By Request offering in Washington state.
10.2.2	Residential Lighting: The Retail delivery channel will be eliminated for TLEDS.	As a result of the updated RTF savings, BPA found the measures no longer a viable option for retail programs.
10.3	Residential Advanced Power Strips: The "Advanced Power Strips — Infrared Sensing (Home Entertainment Centers)" and "Advanced Power Strips — PC Interaction Sensing (Personal Desktop Computers)" offerings will be removed.	As a result of the updated RTF savings, BPA found the measures no longer cost effective.
10.3.1	Residential Advanced Power Strips: By Request payments will be reduced.	Align payments with the current value of the energy savings.
10.3.1	Residential Advanced Power Strips: Home Entertainment application will be moved from the "Requirements and Specifications" section and added to the "Additional Information" section.	Installation location is no longer a specification, but implementation guidance.
10.4	Residential Appliances: The verbiage "and top loaders must be rated CEE Tier 1 or above." will be removed from the Requirements and Specifications.	BPA will be offering a separate measure for ENERGY STAR-rated top loading clothes washers.
10.4	Residential Appliances: All CEE Tier Clothes Washer Measures will be removed.	Deactivated by the RTF; Only ENERGY STAR products will be supported.

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10.4	Residential Appliances: The "By Request" and "Direct Install" delivery channel will be removed.	BPA does not offer measures for By Request or Direct Install appliances.
10.4	Residential Appliances: Clothes washer payments will change, some will go up and some will go down. See the measure list for details. Payments will be leveled by load configuration.	Updated RTF information and BPA Q analysis allowed for updated payment information.
10.5	Electric Water Heating: Heat Pump Water Heater savings will change, some up and some down. Changes range from an increase of 76 kWh to a decrease of 120 kWh.	Updated savings from the RTF.
10.5	Unitary Heat Pump Water Heating: Residential Unitary Heat Pump Water Heater Measures will no longer be eligible for residential new construction.	The RTF has not approved HPWHs for new construction.
10.5.1	Residential Showerheads: This measure will expire. Section 10.5.1 Showerheads will be removed.	Deactivated by the RTF.
10.5.2	Residential Showerheads: Combination TSV and showerheads measures will be removed. Combination units will still be allowed in the TSV measures but savings and payments will be based on the TSV savings only.	Deactivated by the RTF.
10.5.2	Residential Thermostatic Shut-Off Valves (TSV): The savings for stand alone TSVs will decrease.	The savings are being updated due to RTF savings changes.
10.5.2	Residential Thermostatic Shut-Off Valves (TSV): Fuel source documentation will be updated to include absence of natural gas within a service territory to claim electric measures without verification of fuel type.	Updating for continuity with other sections of the Implementation Manual that have the same requirement.
10.5.2	Residential Thermostatic Shut-Off Valves (TSV): By Request payments will be reduced.	Align payments with the current value of the energy savings.
10.5.3	Residential Aerators: This measure will expire. Section 10.5.3 Aerators will be removed.	Deactivated by the RTF.
10.5.4	Unitary Heat Pump Water Heater: Heat Pump Water Heater (HPWH) Measures will be made eligible for multifamily housing.	The RTF measures allow for multi-family housing.
10.5.4	Unitary Heat Pump Water Heater: The any size HPWH measure names will be changed to 50 gallons and above	Structural change due to introduction of 40 gallon HPWH measure.
10.5.4	Unitary Heat Pump Water Heater: Tier 1-3 HPWH measures will no longer have state level measure identifiers in the measure list.	Update to match Tier 4 structure from RTF.
10.5.4	Unitary Heat Pump Water Heater: 40 gallon units will not be able to be claimed using the 50 gallon measure, formerly named Any size.	Accuracy in savings reporting.
10.5.4	Unitary Heat Pump Water Heater: Language regarding one-to-one replacement to be deleted.	This requirement is covered by the "A maximum of one Unitary HPWH measure may be claimed per home. Accessory dwelling units with separate plumbing systems qualify for this measure even if they are on the same electrical meter." language.
10.5.4	Unitary Heat Pump Water Heater: Text requiring a HPWH unit be on the Qualified Products List will be moved to the requirements and specifications section.	Clarify this is a requirement.
10.5.4	Commercial Heat Pump Water Heater: Installations will no longer be eligible for reporting using Residential Unitary measures.	The new Commercial Heat Pump Water Heater measures may be used.
10.5.5	Split-System Heat Pump Water Heater: The detailed qualifications for split-system water heaters will be moved from basis for savings to additional information.	Additional information is more suitable for these detailed characteristics.

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10.5.5	Split-System Heat Pump Water Heater: The detailed qualifications for residential split-system water heaters will be moved from basis for savings to additional information.	Additional information is more suitable for these detailed characteristics.
10.5.5	Commercial Heat Pump Water Heater: Installations will no longer be eligible for reporting using Residential Split-System measures.	The new Commercial Heat Pump Water Heater measures may be used.
10.5.5	Split-system Heat Pump Water Heater: Heat Pump Water Heater measures will be made eligible for multifamily housing.	The RTF measures allow for multifamily housing.
10.6.1	Energy Saver Kits: Kits will be deactivated and replaced with new measures; savings and payments will change.	Kit component measures are no longer RTF approved; new kits developed.
10.6.1	Energy Saver Kits: Kit configuration offerings that include LED bulbs will not be eligible for Washington state.	Due to newly adopted lighting standards in Washington state, the baseline is the efficient case for LED bulbs - they will be omitted from kits available in Washington state.
10.7.1	Ductless and Ducted Mini-Split Heat Pumps: BPA will no longer maintain a Qualified Products List for Ductless Heat Pumps. BPA will require that Ductless Heat Pumps be certified by the Air-Conditioning, Heating, & Refrigeration Institute (AHRI) as meeting our specification and a copy of the AHRI certification will be required in the customer file.	Program Simplification.
10.7.1	Ductless and Ducted Mini-Split Heat Pumps: Savings for Ductless Heat Pumps in zonal heat applications in Single-Family and Manufactured Homes will decrease, no change to payment.	RTF Update.
10.7.1	Ductless and Ducted Mini-Split Heat Pumps: The PIF will no longer be required. Required project information will be captured via BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
10.7.1	Ductless and Ducted Mini-Split Heat Pumps: Ductless Heat Pumps will no longer be available in New Residential Single-Family applications. Ductless Heat Pumps are still available in New Manufactured Homes.	The RTF no longer supports Ductless Heat Pumps in New Construction.
10.7.2	PTCS Specifications redesigned: Numerous changes will be made to update program specifications for Air Source Heat Pumps, VSHPs, GSHPs, and PTCS Duct Sealing and Prescriptive Duct Sealing. See details in the PTCS Change Notice Summary .	A regional PTCS Workgroup reviewed the program and worked to update numerous specifications to streamline and improve the program.
10.7.2	PTCS Participation Requirements: Multiple changes will be made to PTCS participation requirements that are not reflected in the Implementation Manual language. For more information see the PTCS Change Notice Summary .	A regional PTCS Workgroup reviewed the program and worked to update several participation requirements to streamline and improve the program.
10.7.2.1	PTCS Air Source Heat Pumps: The kWh savings will decrease. No change to payments.	RTF changed the kWh savings.
10.7.2.1	PTCS Air Source Heat Pumps: BPA will rename the PTCS ASHP Form to "PTCS ASHP optional data collection tool," remove it from Required Documentation, and list it as optional under Additional Information.	All PTCS forms are optional and only used for data collection purposes.
10.7.2.1	PTCS Air Source Heat Pumps: BPA will remove the Documentation Requirement to store the following installation and sizing information in Customer File, and instead list it as optional under Additional Information: <ul style="list-style-type: none"> • PTCS Air Source Heat Pump Form (handwritten form located in the Implementation Manual Document Library); or • CheckMe!® Heat Pump Protocol Data Entry Form for PTCS Summer and Winter and • PTCS Heat Pump and Central Air Conditioner Sizing Calculator available in the Implementation Manual Document Library, or; • A heat load/heat loss calculation and associated balance point worksheet (i.e. a calculator, graph, or chart). 	To streamline record keeping requirements.

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10.7.2.2	PTCS Variable Speed Air Source Heat Pumps: The kWh savings will decrease. No change to payments.	RTF changed the kWh savings.
10.7.2.2	PTCS Variable Speed Air Source Heat Pumps: BPA will rename the PTCS ASHP Form to "PTCS ASHP optional data collection tool," remove it from Required Documentation, and list it as optional under Additional Information.	All PTCS forms are optional and only used for data collection purposes.
10.7.2.2	PTCS Variable Speed Air Source Heat Pumps: We will remove the Documentation Requirement to store the following installation and sizing information in Customer File, and instead list it as optional under Additional Information: <ul style="list-style-type: none"> • PTCS Air Source Heat Pump Form (handwritten form located in the Implementation Manual Document Library); or • CheckMe!® Heat Pump Protocol Data Entry Form for PTCS Summer and Winter and • PTCS Heat Pump and Central Air Conditioner Sizing Calculator available in the Implementation Manual Document Library, or; • A heat load/heat loss calculation and associated balance point worksheet (i.e. a calculator, graph, or chart). 	To streamline recordkeeping requirements.
10.7.2.3	PTCS Commissioning Controls & Sizing (CC&S) measure: BPA will rename the PTCS ASHP Form to "PTCS ASHP optional data collection tool," remove it from Required Documentation, and list it as optional under Additional Information.	All PTCS forms are optional and only used for data collection purposes.
10.7.2.3	PTCS Commissioning Controls and Sizing (CC&S) Measure: BPA will remove the Documentation Requirement to store the following installation and sizing information in Customer File, and instead list it as optional under Additional Information: <ul style="list-style-type: none"> • PTCS Air Source Heat Pump Form (handwritten form located in the Implementation Manual Document Library); or • CheckMe!® Heat Pump Protocol Data Entry Form for PTCS Summer and Winter; and • PTCS Heat Pump and Central Air Conditioner Sizing Calculator available in the Implementation Manual Document Library, or; • A heat load/heat loss calculation and associated balance point worksheet (i.e. a calculator, graph, or chart). 	To streamline recordkeeping requirements.
10.7.2.4	PTCS Ground Source Heat Pumps: The kWh savings will decrease. No change to payments.	RTF changed the kWh savings.
10.7.2.4	PTCS Ground Source Heat Pumps: BPA will rename the PTCS GSHP Form to "PTCS GSHP optional data collection tool," remove it from Required Documentation, and list it as optional under Additional Information.	All PTCS forms are optional and only used for data collection purposes.
10.7.2.4	Ground Source Heat Pumps: BPA will combine PTCS Ground Water Source Open Loop Installation Specifications and RTF Residential Ground Source Heat Pump System Installation Standards into one spec. Will update the form to accommodate this change, and remove unused checklists from form.	To streamline and shorten documents as per PTCS redesign.
10.7.2.4	Ground Source Heat Pumps: BPA will remove the Documentation Requirement to store the following installation and sizing information in Customer File, and instead list it as optional under Additional Information: <ul style="list-style-type: none"> • Heat load/heat loss calculation; and • Balance point worksheet (i.e. a calculator, graph or chart); and • Loop-design documentation. 	To streamline and simplify recordkeeping requirements.
10.7.2.5	PTCS Duct Sealing: BPA will rename the PTCS Duct Sealing Form to "PTCS Duct Sealing optional data collection tool," remove it from Required Documentation, and list it as optional under Additional Information.	All PTCS forms are optional and only used for data collection purposes.
10.7.2.5	PTCS Duct Sealing: Sealing of "new" ducts and/or ducts in new construction, was removed from the Implementation Manual in April 2016, but never change noticed.	This is the change notice pointing out this change.
10.7.2.5	PTCS Duct Sealing - Previously Sealed Ducts: Resealing of ducts will be allowed at the discretion of the utility (i.e. a second duct sealing only). Provided that all other program requirements are met.	Additional flexibility was requested by utilities and COTRs.

LOCATION	DESCRIPTION	RATIONALE
10.7.3	Prescriptive Duct Sealing: BPA will rename the Prescriptive Duct Sealing Form to the "Prescriptive Duct Sealing optional data collection tool," remove it from Required Documentation, and list it as optional under Additional Information.	The Prescriptive Duct Sealing data collection tool is optional and only used for data collection purposes.
10.7.3	Prescriptive Duct Sealing: Sealing of "new" ducts and/or ducts in new construction was removed from the Implementation Manual in April 2016, but never change noticed.	This is the change notice pointing out this change.
10.7.3	Prescriptive Duct Sealing - Previously Sealed Ducts: Resealing of ducts will be allowed at the discretion of the utility (i.e. a second duct sealing only). Provided that all other program requirements are met.	Additional flexibility was requested by utilities and COTRs.
10.8.1	Line Voltage Thermostats: Savings for Line Voltage Thermostats in Single-Family and Multifamily will increase, no change to payment.	RTF Update.
10.8.2	Advanced Smart Thermostats: The PIF for Advanced Smart Thermostats will no longer be required, the Thermostat Make and Model will now be required in BEETS or the UES Measure BEETS upload template.	The required information will be captured in BEETS.
10.8.2	Advanced Smart Thermostats: Payments for Advanced Smart Thermostats will be increased to \$140 for all delivery mechanisms.	Additional implementation support.
10.9.1	NEEM Manufactured Homes: Savings for new NEEM Manufactured Homes will decrease, no change to payment.	RTF Update.
10.9.4	Montana House: The Montana House measure will no longer be available beginning October 1, 2023. We are providing advanced notice to ensure that utilities are aware that projects permitted prior to that date but not completed until afterward will not be eligible for a payment.	The RTF has expired the measure.
10.9.5	BPA Energy Efficient New Multifamily Construction: BPA will no longer allow custom projects for new multifamily construction.	The savings above code requires highly complex and specialized energy models to verify what the savings are above code. BPA does not have the resources to do this, we rely on the third party implementation programs referenced in the UES Measures to perform this modeling and determine the code trade-offs utilized.
10.9.6	BPA Zero Energy Ready New Multifamily Construction: BPA does not allow custom projects for new multifamily construction.	The savings above code requires highly complex and specialized energy models to verify what the savings are above code. BPA does not have the resources to do this, we rely on the third party implementation programs referenced in the UES Measures to perform this modeling and determine the code trade-offs utilized.
10.10	Weatherization: For all Residential Weatherization, the primary heating type will be required for all measures upon entry into BEETS effective April 2022.	Change to be made to align with BEETS and Implementation Manual reporting requirements.
10.10	Weatherization: Savings will be changing for many Single-Family, manufactured home, and some multifamily weatherization measures, including air sealing, insulation, prime windows, and low-e storm windows effective April 2022. No change to incentive levels. See UES Measure list for specific changes.	Changes will be made to be consistent with the RTF.
10.10.1	Insulation: BPA will correct the language that the sloped surface of an A-frame home must be insulated and invoiced per Weatherization Specification Section 4.7: Sloped Roofs and Finished Attics effective April 2022.	Correcting language to align with current Weatherization Specifications.
10.10.1	Insulation: BPA will clarify that knee walls should be invoiced as wall insulation and not attic insulation per Weatherization Specification Section 8: Wall Insulation: Site Built Homes effective April 2022.	Clarification made to reflect current Weatherization Specifications.

LOCATION	DESCRIPTION	RATIONALE
10.10.1	Insulation: BPA will clarify that manufactured roof insulation with blown-in attic and rigid insulation covered by an EPDM roof can be claimed as one roof insulation measure and be based on total insulation value effective April 2022.	Clarification will be made to reflect current Weatherization Specifications.
10.10.1	Insulation: The measure option for Existing Single-Family Attic Insulation from R38 to R49 will expire on March 31, 2022. All other attic insulation measures will remain. Please use the measure for Single-Family Attic Insulation R30 to R49 instead starting April 2022.	Expiring this measure to be consistent with the RTF.
10.10.4	Exterior Insulated Doors (BPA-Qualified): In addition to being ENERGY STAR-rated, BPA will also accept NFRC-rated doors that meet specific U-factor and solar heat gain coefficient requirements based on glazing levels effective April 2022.	Allowing an additional path to certify qualification.
10.10.4	Exterior Insulated Doors (BPA-Qualified): BPA will accept pre-existing models that were ENERGY STAR-Qualified at the time they were manufactured even if ENERGY STAR specifications have changed, effective April 2022.	BPA will allow previously ENERGY STAR models to address how to qualify older exterior insulated doors.
10.10.4	Exterior Insulated Doors (BPA-Qualified): BPA will accept a copy of the National Fenestration Rating Council (NFRC) sticker to demonstrate qualification, effective April 2022.	BPA will allow an additional path to certify qualification.
10.10.7	Low-Income Energy Efficiency Measures: BPA will expire the retail distribution option for the low-income Smart Thermostat measure. Only contractor-installed Smart Thermostats will qualify for a low-income payment effective April 2022.	Change to be made to ensure low-income installation costs are accounted for.
10.10.7	Low-Income Energy Efficiency Measures: Low-income deemed measure installed payment cost caps will be increasing for Ductless Heat Pumps up to \$4,400, PTCS Ducted Air Source Heat Pumps up to \$6,200, Tier 1 Heat Pump Water Heaters up to \$1,850, and Tier 2 or 3 Heat Pump Water Heaters up to \$2,000 effective April 2022.	Updating some low-income payment cost caps to reflect recent RTF measure installation cost analysis.
10.10.7	Low-Income Energy Efficiency Measures: Low-Income Heat Pump Water Heater Measures will be made eligible for all multifamily housing types (low, mid, and high-rise) effective April 2022.	Aligning the Implementation Manual and UES Measure List.
10.10.7	Low-Income Energy Efficiency Measures: BPA will clarify that Duct Insulation in Single-Family homes and Patio Door Replacements in Multifamily Mid/High-Rise Homes are eligible Low-Income measures.	Based on two previously 2020 change notices, clarifying qualifying low-income measures.
10.10.7	Low-Income Energy Efficiency Measures: Clarification to be added in April 2022 that gross income should be used to calculate income qualification.	Clarification will be made to be consistent with WAP income qualification guidelines.
MULTI-SECTOR		
12.3.2	Green Motors: Section 12.3.2 Green Motors will be moved to the Industrial Sector section.	The initiative consists of Industrial and Agricultural Sector UES Measures. Since a majority of the energy savings are industrial, the measure will be moved to the Industrial Sector. This aligns the initiative with other measures that apply to multiple sectors.
12.3.3	Limited Availability Emerging Technology Field Test Projects: Section 12.3.3 will be moved to Section 4.	Section 12.3.3 Limited Availability Emerging Technology Field Test Projects will be moved to Section 4 due to Section 12 being eliminated. Test projects are a type of Custom Project and are required to be submitted as Custom Projects.
13.2.2.2	Commercial Heat Pump Water Heaters: BPA will remove language regarding the option to use the Residential Sector 10.5.4 Unitary Heat Pump Water Heater and Split-System Heat Pump Water Heater measures for Commercial installations through March 31, 2022.	As of April 1, 2022, HPWHs installed in Commercial applications must use the Commercial Heat Pump Water Heater measure.