

**nationalgrid**

# C&I Prescriptive Heat Pump Application Data Entry Training



# **Entering Prescriptive Heat Pump Applications into the InDemand Electric Module Displacing Oil, Propane, or Electric Resistance Heating**

# Creating a Prescriptive HP Application in the Electric Module

## Program

- “Design 2000”
- All prescriptive heat pumps are considered “New & Replacement Equipment”

## Subprogram

- “Prescriptive Heat Pump Electrification” IF displacing fuel oil or propane heating
- “Prescriptive Heat Pump Standard EE” IF displacing electric resistance heating

*Customer Facility Name	Bryant & Co.
*Company	MECO ▼
*State	MA
*District	NORTH SHORE ▼
*Account Manager	Meuse, Deborah ▼
*Program	Design 2000 ▼
*Program Year	2022 ▼
*Subprogram	----- ▼
<div>Cancel</div>	

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Compressed Air

Cool Choice

Custom

Custom Heat Pump Electrification

Custom Heat Pump Standard EE

HVAC

Lighting

Miscellaneous Prescriptive/Tiered Inc

Prescriptive Heat Pump Electrification

Prescriptive Heat Pump Standard EE

VFD



# Creating a Prescriptive HP Application in the Electric Module

## Square footage covered by application

- Value from application
- Represents the area served by heat pumps
- This value will be allocated to the individual heat pump measures based on proportional capacity.

## Design 2000 Project Type

- “Planned Replacement of Equipment”

Sq. Ft Covered by Application(sqft)	<input type="text" value="1250"/>
Design 2000 Project Type	<div>N/A</div>
Federal ID Number	CHANGE IN THE USE OR FUNCTION OF THE BUILDING SPACE EXPANSION OF AN EXISTING BUILDING
Company Type	N/A NEW BUILDING
* Phone Number	NEW CONTROLS FOR IMPROVED OPERATIONS NEW EQUIPMENT FOR NEW PROCESS OR EXPANDED OPERATION PLANNED REPLACEMENT OF EQUIPMENT
Cellphone Number	RENOVATION OF AN EXISTING BUILDING REPLACEMENT OF FAILED EQUIPMENT
Email Address	

# Creating a Prescriptive HP Application in the Electric Module

Classification will auto populate based on the subprogram and design 2000 project type selected

- “Electrification\_Prescriptive\_NRE”
  - If the heat pump is displacing fuel oil or propane heating
- “StandardEE\_Prescriptive\_NRE”
  - If the heat pump is displacing electric resistance heating

Classification	Electrification_Prescriptive_NRE ▼
SEMP Customer	----- Electrification_Prescriptive_NRE

Classification	StandardEE_Prescriptive_NRE ▼
SEMP Customer	----- StandardEE_Prescriptive_NRE

# Creating a Prescriptive HP Application in the Electric Module

On “Facility Detail” tab

- Add New Installation Site
- Add Heat Pump

Version Information	
ECM Plan Version:	<input type="text" value="v"/>
VersionCreate Date:	

No Installation Sites exist. An Installation Site must be created

[Add New Installation Site](#)

[HVAC Customer Report](#)

Installation Site: Bryant & Co. <a href="#">Change Installation Site</a> <a href="#">Delete Install</a>				
Standard Measures				
Measure Category	Measure Description	Quantity	Unit Size (tons)	Effici Meas
Heat Pump Measures				
Measure Category	Measure Description	Quantity	Equipment Tonnage	Total
<a href="#">Add Chiller</a>				
<a href="#">Add HVAC Controls</a>				
<a href="#">Add Heat Pump</a>				
Secondary Measures				
Measure Code	Measure Description	No of Installed Measures		
<a href="#">Add Secondary Measure</a>				

# Creating a Prescriptive HP Application in the Electric Module

## Select Existing Fuel Type

- Oil
- Propane
- Electric

Proposed Device	
Measure Category	Heat Pump
Measure Code	-
*Existing Fuel Type	----- ▾
*Proposed System Type	----- ▾
*Fully Replaced Existing System	Oil Propane Electric
*Is Building Weatherized?	----- ▾

## Select Heat Pump Type

- Small ASHPs are under 65kBtu/hr
- Large ASHP are over 65kBtu/hr
- VRF are over 65kBtu/hr and must meet AHRI Standard 1230

Proposed Device	
Measure Category	Heat Pump
Measure Code	-
*Existing Fuel Type	Oil ▾
*Proposed System Type	----- ▾
*Fully Replaced Existing System	----- ▾
*Is Building Weatherized?	Small ASHP Large ASHP VRF GSHP
*Condenser Brand	

# Creating a Prescriptive HP Application in the Electric Module

## Fully Replaced Existing System

- Yes/No

## Is Building Weatherized?

- Two questions on application – if yes to either select yes
  - Was your building constructed or had a major renovation completed on or after 2000?
  - Has your building received weatherization upgrades in the last 15 years?

Measure Category	Heat Pump
Measure Code	-
*Existing Fuel Type	Oil ▼
*Proposed System Type	Small ASHP ▼
*Fully Replaced Existing System	----- ▼
*Is Building Weatherized?	----- ▼
*Condenser Brand	Yes No

Measure Category	Heat Pump
Measure Code	-
*Existing Fuel Type	Oil ▼
*Proposed System Type	Small ASHP ▼
*Fully Replaced Existing System	Yes ▼
*Is Building Weatherized?	----- ▼
*Condenser Brand	Yes No
*Condenser Model	



# Creating a Prescriptive HP Application in the Electric Module

Measure Code will populate based on the four variables below

- **Existing Fuel Type**
- **Proposed System Type**
- **Fully Replaced Existing System**
- **Is Building Weatherized**

The Measure Code cannot be edited, but the variables can

Proposed Device	
Measure Category	Heat Pump
Measure Code	VRFFOH - VRF Fully Displacing Existing Heating Equipment, Oil
*Existing Fuel Type	<input type="text" value="Oil"/>
*Proposed System Type	<input type="text" value="VRF"/>
*Fully Replaced Existing System	<input type="text" value="Yes"/>
*Is Building Weatherized?	<input type="text" value="No"/>
*Condenser Brand	<input type="text"/>
*Condenser Model	<input type="text"/>
*Equipment AHRI cooling capacity	<input type="text"/>
*Measure EER	<input type="text"/>
*Measure SEER/IEER	<input type="text"/>
*Measure COP/HSPF	<input type="text"/>
*Equipment Quantity	<input type="text"/>
AHRI Number	<input type="text"/>
Integrated Control Model Number	<input type="text"/>
SwitchOver Temperature	<input type="text"/>

# Creating a Prescriptive HP Application in the Electric Module

Fields used for savings and incentive calculation are highlighted in red.

Fields used for verifying eligibility/market intelligence are highlighted in yellow.

Fields that are only needed for partial displacement scenarios (i.e. not fully replacing existing system) are highlighted in green

Proposed Device	
Measure Category	Heat Pump
Measure Code	VRFFOH - VRF Fully Displacing Existing Heating Equipment, Oil
*Existing Fuel Type	Oil
*Proposed System Type	VRF
*Fully Replaced Existing System	Yes
*Is Building Weatherized?	No
*Condenser Brand	
*Condenser Model	
*Equipment AHRI cooling capacity	
*measure EER	
*Measure SEER/IEER	
*Measure COP/HSPF	
*Equipment Quantity	
AHRI Number	
Integrated Control Model Number	
SwitchOver Temperature	

# Creating a Prescriptive HP Application in the Electric Module

Product characteristics and quantities can be changed but not product / measure type

Proposed Device	
Measure Category	Heat Pump
Measure Code	ASSFOHWx
Existing Fuel Type	Oil
Proposed System Type	Small ASHP
Fully Replaced Existing System	Yes
Is Building Weatherized?	Yes
*Condenser Brand	<input type="text" value="AAA"/>
*Condenser Model	<input type="text" value="aaa"/>
*Equipment AHRI cooling capacity	<input type="text" value="12345.0"/>
*Measure EER	<input type="text" value="3232.0"/>
*Measure SEER/IEER	<input type="text" value="3232.0"/>
*Measure COP/HSPF	<input type="text" value="3232.0"/>
*Equipment Quantity	<input type="text" value="2"/>
AHRI Number	<input type="text" value="232323"/>
Integrated Control Model Number	<input type="text" value="2323"/>
SwitchOver Temperature	<input type="text" value="23"/>

# Creating a Prescriptive HP Application in the Electric Module

## Facility Detail (electric module)

Installation Site: test [Change Installation Site](#) [Delete Installation Site](#)

Standard Measures								
Measure Category	Measure Description	Quantity	Unit Size (tons)	Efficiency Unit of Measure	Unit Efficiency	Estimated Full Load Hours	ECM Detail	
Heat Pump Measures								
Measure Category	Measure Description	Quantity	Equipment Tonnage	Total Tonnage	Square Footage	ECM Detail		
Heat Pump	Small Air Source HP Fully Displacing Existing Heating Equipment, Oil_Wx	2	1.03	2.06	513.0	<a href="#">View</a>	<a href="#">Change</a>	<a href="#">Delete</a>
Heat Pump	Large Air Source HP Partially Displacing Existing Heating Equipment, Oil_Wx	1	0.92	0.92	229.0	<a href="#">View</a>	<a href="#">Change</a>	<a href="#">Delete</a>
Heat Pump	Small Air Source HP Partially Displacing Existing Heating Equipment, Oil	2	0.92	1.84	458.0	<a href="#">View</a>	<a href="#">Change</a>	<a href="#">Delete</a>

[Add Chiller](#)  
[Add HVAC Controls](#)  
[Add Heat Pump](#)

# Creating a Prescriptive HP Application in the Electric Module

## ECM Installation Plan (electric module)

Heat Pump				
Measure Description	Unit Size (tons)	Quantity	Calculated Incentive	Authorized Incentive
Small Air Source HP Partially Displacing Existing Heating Equipment, Oil	0.92	2	\$4,600.00	\$
Small Air Source HP Fully Displacing Existing Heating Equipment, Oil_Wx	1.03	2	\$5,150.00	\$
Large Air Source HP Partially Displacing Existing Heating Equipment, Oil_Wx	0.92	1	\$2,300.00	\$



# When entering prescriptive HP applications...

- **Confirm that the cooling capacity on the application form matches the cooling capacity on the AHRI certificate**
  - **Clarify any discrepancy with customer/contractor**
- **Confirm that any product represented as “VRF” is rated as such on the AHRI certificate.**
  - **No products <65000 kBtu/hr are rated as VRFs**
  - **Variable-speed, inverter-driven ASHPs ≠ VRF**
- **Confirm that rated efficiency levels meet minimum requirements on application form**

# When entering prescriptive HP applications...

- Please be sure you're populating the contractor information when creating prescriptive heat pump applications
- This information will be used by our Commercial Trade Network Partnership Group to help identify and engage with participating heat pump contractors

Installation Contractor Information	
Installation Performed By	Customer <input type="text"/>
Project Expeditor Company	----- <input type="text"/>
Company Name	<input type="text"/>
Contact Person	<input type="text"/>
Email	<input type="text"/>
Phone Number	<input type="text"/> - <input type="text"/> - <input type="text"/> ext. <input type="text"/>
Street Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/> - <input type="text"/>
Fax Number	<input type="text"/> - <input type="text"/> - <input type="text"/>

# Eligibility Requirements

- **Eligibility requirements can be found on the 2022 Commercial Heat Pump application. Link - <https://www.masssave.com/-/media/Files/PDFs/Business/rebate-forms/2022-Commercial-Heat-Pump.pdf>**
  - Equipment must be qualified, listed with, and certified by the Air Conditioning, Heating and Refrigeration Institute (AHRI) and must meet the minimum requirements outlined in the application. Refer to [MassSave.com/CIHPQPL](https://www.masssave.com/CIHPQPL) for a list of qualified models or reach out to your National Grid Sales Representative or Tech Representative before installation if units are not listed on the QPL.
  - All non-heat pump measures must be submitted through a separate application.
  - Heat pump to heat pump conversions do not qualify for an incentive via the heat pump application.
    - If upgrading electric heating equipment results in electric savings, it can be considered a standard EE measure. Please reach out to your Sales Representative for additional information.
  - Municipal electric customers are eligible for an incentive provided the customer has an existing natural gas service through National Grid.

# Required Documentation/InDemand Fields

- **In order to receive a rebate for a commercial heat pump, the following documents must be submitted via InDemand:**
  - Completed and signed rebate form
  - AHRI certificates
  - Copy of invoice from a licensed heating installer/vendor, including:
    - Equipment model numbers (include indoor units where appropriate)
    - Integrated control model number(s) (Only required for partial displacement)
    - Installation date
    - Installation address
    - Total installation cost
    - Installation company/contractor information
  - Copy of W-9

# Required Documentation/InDemand Fields

- **In order to receive a rebate for a commercial heat pump project and avoid processing delays, the following fields must be entered into InDemand. Most of these fields are also required on the heat pump application.**
- **Required InDemand fields also included in heat pump application:**
  - AHRI Number
  - Measure EER, COP/HSPF, and SEER/IEER
  - Switchover Temperature (Only required for partial displacement)
  - Equipment Tonnage and Total Tonnage
  - Equipment AHRI Cooling Capacity
  - Quantity
  - Square Footage
  - Calculate Incentive Amount (Rebate)
- **Required InDemand fields not included in heat pump application:**
  - Measure Life (Use 18 years for all heat pumps except ground source systems. Use 25 years for ground source systems)
  - Brand and Model (Can be determined by referencing AHRI certificate)



## National Grid Commercial Heat Pump Rebate Application

All Fields On This Page Are Required To Complete Your Application.

This application is for use only by National Grid electric customers installing a heat pump system to displace a fuel oil, propane, or electric resistance system OR by National Grid natural gas customers installing a heat pump system to displace a natural gas system.

ELECTRIC ACCOUNT NUMBER	GAS ACCOUNT NUMBER
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Account Holder Information			
COMPANY NAME	INSTALLATION SITE NAME		APPLICATION DATE
INSTALLATION ADDRESS	CITY	STATE	ZIP
MAILING ADDRESS (IF DIFFERENT)	CITY	STATE	ZIP
CONTACT NAME	EMAIL ADDRESS		PHONE
BUILDING TYPE	IF OTHER, PLEASE SPECIFY	SQUARE FEET COVERED BY NEW EQUIPMENT	

Square Footage

Payment Method – Payee Must Submit a W-9 Form (Tax Id# Required if Receiving Rebate)	
PAYMENT TO	PAYEE TAX ID#
CHECK PAYABLE TO: <input type="checkbox"/> Customer <input checked="" type="checkbox"/> Vendor/Installer	PAYEE COMPANY TYPE: <input type="checkbox"/> Incorporated <input type="checkbox"/> Not Incorporated <input type="checkbox"/> Exempt

Vendor Information			
VENDOR/INSTALLER	CONTACT PERSON		
PHONE	EMAIL ADDRESS		
STREET ADDRESS	CITY	STATE	ZIP
VENDOR/INSTALLER AUTHORIZED SIGNATURE (NOT APPLICABLE IF CUSTOMER IS PAYEE)			DATE

Customer Acceptance of Terms		
I certify that all statements and information, including attachments, made in this rebate form are correct, complete, true, and accurate to the best of my knowledge, and that I have read and agree to the terms and conditions on this form.		INSTALLATION DATE
PRINT NAME	AUTHORIZED SIGNATURE	DATE

## Project Information

Weatherization is crucial to ensuring efficient heat pump operation. Please provide the following information about your project/building:

Was your building constructed, or had a major renovation completed, on or after 2000?				<input type="checkbox"/> Yes	<input type="checkbox"/> No/Unsure			
Has your building received weatherization upgrades in the last 15 years?				<input type="checkbox"/> Yes	<input type="checkbox"/> No/Unsure			
Are you interested in receiving an energy assessment from National Grid?				<input type="checkbox"/> Yes	<input type="checkbox"/> No/Unsure			
Fully replacing pre-existing heating system?				<input type="checkbox"/> Yes	<input type="checkbox"/> No/Unsure			
Pre-existing heating fuel type:		<input type="checkbox"/> Oil	<input type="checkbox"/> Propane	<input type="checkbox"/> Natural Gas	<input type="checkbox"/> Electric Resistance			
Switchover temp <sup>4</sup> (°F):		Integrated control model number(s) <sup>5</sup>						
Equipment Type (ASHP, VRF, GLHP, GWHP)	AHRI Reference#	AHRI Ratings <sup>6</sup>				Equipment Tonnage <sup>7</sup>	Qty	Rebate
		EER	SEER/ IEER	HSPF/ COP	Cooling Capacity (btu/h)			
ASHP	205599563	10.90	18.00	10.00	24,000	2.00	1	\$5,000
						0.00		\$ 0.00
						0.00		\$ 0.00
						0.00		\$ 0.00
						0.00		\$ 0.00
Total Project Cost:		Total:				0.00	0	\$ 0.00

<sup>4</sup> The "Switchover Temp" is the outdoor temperature below which the supplemental/pre-existing heating system will be enabled (recommended to be at or below 30°F). This should be automatically controlled using an Integrated Control Module or with an existing building monitoring system.

<sup>5</sup> Integrated Control Modules must be listed on Mass Save's CPL ([www.masssave.com/cpl](http://www.masssave.com/cpl)). If certifying that an existing building monitoring system will control the HP and the pre-existing heating system, please input "BMS" into this field. Integrated Control Modules are not required for applications that will be fully displacing the pre-existing heating system.

<sup>6</sup> Cooling tons is calculated by dividing the cooling capacity by 12,000 Btu/h

<sup>7</sup> Rounding up of AHRI ratings is not acceptable

<sup>8</sup> Cooling tons is calculated by dividing the cooling capacity by 12,000 Btu/h

# Useful Links/Information

- **Project Expeditors should not be interfacing with Energy Solutions. Questions related to heat pump projects can be directed to your National Grid Sales Representative.**
- **Mass Save Commercial Heat Pump Landing Page – <https://www.masssave.com/saving/business-rebates/ci-heat-pump>**
- **Mass Save Commercial Heat Pump Application – <https://www.masssave.com/-/media/Files/PDFs/Business/rebate-forms/2022-Commercial-Heat-Pump.pdf>**
- **QPL - [MassSave.com/CIHPQPL](https://www.masssave.com/CIHPQPL)**
- **The Massachusetts Commercial Customer Electrification Program Frequently Asked Questions: For PEX Vendors document has been distributed. If you do not have this document, please email [Mathew.McCarthy@nationalgrid.com](mailto:Mathew.McCarthy@nationalgrid.com) and request a copy.**