

DATE: December 16, 2020
TO: HVAC and Geothermal Installation Contractors
FROM: Jonathan Tham, PSEG Long Island Home Comfort Program Administrator
RE: 2021 Home Comfort Program

2021 Contractor Participation Agreement:

All contractors interested in participating in the 2021 Home Comfort program must sign the attached 2021 Contractor Participation Agreement in order to be eligible to extend program rebate. As a Home Comfort Partner, you will have access to program rebates and incentives as well as a listing on PSEG Long Island's Home Comfort web page, which can be found at www.psegliny.com/saveenergyandmoney/homeefficiency/homecomfort

Please review, sign and return the participation agreement in order to be included in the 2021 program.

Existing Partners must sign and return the Contractor Participation Agreement.

Scan and email the agreement signature page and the following to: Joshua.Ebner@pseg.com

- i. A copy of valid EPA refrigerant handling certificate for each technician to be certified,
- ii. Documentation of valid Nassau and/or Suffolk County home improvement contractor license,
- iii. Documentation showing a current, general liability insurance policy with a minimum coverage of \$1 million,
- iv. Signed and completed IRS W-9 form, and
- v. For ground source heat pump contractors, current International Ground Source Heat Pump Association (IGSHPA) Accredited Installer or Certified GeoExchange Designer certificate.

For more information regarding IGSHPA certification, please check <http://www.igshpa.org>.

If you have any questions, please feel free to contact me at 631-501-2092.

Sincerely,

Joshua Ebner



Joshua Ebner | Program Coordinator
PSEG Long Island | Home Comfort Program
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Program requirements:

Quality Installation:

All Home Comfort Partners pledge to adhere to industry recommended Heat Pump quality installation standards in order to protect the inherent efficiency and performance of the installed equipment. The Home Comfort QI standard is based on the ANSI / ACCA 5 QI 2015 HVAC Quality Installation Specification and addresses equipment selection, installation, and commissioning.

ACCA Manual J Version 8:

Improper sizing of residential HVAC equipment causes poor equipment performance and excessive energy consumption, particularly during times of peak electricity demand.

Since 2000, the Home Comfort Program has required that all installations eligible for incentives include equipment sized according to ACCA Manual J version 8 procedures for sensible and latent loads. Although any brand Manual J version 8 Residential software will be accepted, PSEG/LI recommends the use of ACCA approved software.

Equipment Selection:

The capacity of the equipment shall be within 15% tolerance of the Manual J load calculations and the system components will be verified as matched by AHRI certification.

Airflow and System Charging:

Improper refrigerant charge and system airflow will significantly reduce both the performance and energy efficiency of equipment. The Home Comfort Partner will therefore be required to measure and verify that system airflow and refrigerant charge is within acceptable ranges. The contractor must also establish the system installation meets ACCA 5 Quality Installation Standards. The contractor will note the airflow and charge specifications, measurements, and testing techniques on the PSEG/LI Airflow & Charge Form.

PSEG/LI will maintain a rigorous schedule of verification or quality assurance visits to verify the quality installation. It will be required to maintain a successful post installation passing rate of 90% or better.

Application processing:

Current contractor and customer installation incentives are listed on the 2021 Home Comfort Application Worksheet as are the Guidelines, Terms and Conditions and Requirements for submission. Active contractors will be notified of any incentives, rebate or terms changes.

Please note: Contractors are eligible for the contractor incentives if the following items (with no exception) are submitted.

1. Rebate Application signed and dated by the customer and contractor
2. Completed Worksheet
3. Completed PSEG/LI Airflow and Refrigerant Charge form (*not required for Ductless Mini Split Systems and Geothermal Heat Pump Systems*)
4. ACCA approved Manual J Version 8 software cooling and heating load calculation summary printout,

5. Invoice / Contract must contain total cost, equipment make, model & serial number as well as customer name, installation address, and installation date
6. Rebate Assignment Form (if applicable)
7. Equipment certificate printout from the AHRI On-Line Directory. Please indicate AHRI Reference # on Worksheet
8. Project Completion Form, signed and dated by the customer and contractor

Contractors must submit documentation within the specified timeframe.

Failure to submit all required documentation will result in rebate payment delays or denial of the application.

You can call the PSEG Long Island Energy Infoline at 1-800-692-2626 for further information throughout the year. You can also visit www.psegliny.com/saveenergyandmoney/homeefficiency/homecomfort for additional Home Comfort Program information.

2021 Home Comfort Program Contractor Participation Agreement:

The goal of the PSEG Long Island Home Comfort Program is to improve the energy efficiency, performance, and reliability of HVAC equipment installed in homes in PSEG/LI's service territory. PSEG/LI works with independent residential HVAC contractors to implement Home Comfort. In addition, TRC Companies has been contracted to provide quality control and other technical services. Home Comfort promotes the use of industry standard diagnostic tools and equipment sizing and installation techniques to maximize energy efficiency and optimize HVAC performance. Home Comfort works to support a market for energy efficient HVAC equipment, high quality installation services and an infrastructure of trained contractors to deliver such services.

This Agreement sets out the terms and conditions under which independent, residential HVAC contractors may participate in Home Comfort, thereby becoming Home Comfort Partners. Under this Agreement, Home Comfort Partners contract with property owners to provide residential HVAC services that comply with Home Comfort's requirements and standards. Home Comfort, in return, agrees to provide financial incentives, technical and marketing support for Home Comfort Partners.

This Agreement is completely voluntary and can be terminated at any time for any reason by either PSEG Long Island or the Home Comfort Partner.

By executing this Agreement, the Home Comfort Partner agrees to play an active role in PSEG Long Island Home Comfort by providing high-quality services to Home Comfort's customers. As a condition of participating in Home Comfort and accessing program benefits, the Home Comfort Partner must meet the following requirements:

- 1. The Home Comfort Partner must demonstrate the capability to conduct business successfully by providing Home Comfort with:**
 - i. A copy of valid EPA refrigerant handling certificate for each technician to be certified,
 - ii. Documentation of valid Nassau and/or Suffolk County home improvement contractor license,
 - iii. Documentation showing a current, general liability insurance policy with a minimum coverage of \$1 million,
 - iv. Signed and completed IRS W-9 form, and
 - v. For ground source heat pump contractors, current International Ground Source Heat Pump Association (IGSHPA) Accredited Installer or Certified GeoExchange Designer certificate.

Contractors unable to meet these requirements may submit, in writing, a Request for Waiver to PSEG/LI. The Request for Waiver must provide a detailed, reasonable, and credible explanation of the reasons why the Contractor is unable to comply with the terms of the requirement. PSEG/LI reserves the right to reject any and all applications or Request for Waivers.

- 2. The Home Comfort Partner shall commit to performing quality installations including:**
 - Properly sized systems as determined by heating load calculations performed using ACCA approved, Manual J v.8 compliant software, and relevant PSEG/LI guidelines for equipment selection (see application for details). Submitting a Manual J summary report as part of each application for Home Comfort contractor incentives is required.

- Follow industry standards system airflow and refrigerant charge test procedures and report results on the PSEG/LI Airflow & Charge Form.
- Respond to the results of random field inspections of Home Comfort Partner installations (by PSEG/LI and/or TRC Companies).

Upon request from PSEG/LI or TRC Companies, and at no additional cost to the customer, make reasonable repairs or corrections so that work will meet Home Comfort standards.

- **Quality control inspection failure rate greater than 10% may result in a delay of processing the customer rebate and loss of contractor incentive.**
- 3. The Home Comfort Partner shall maintain necessary equipment as indicated on the Required Equipment List.**
 - 4. The Home Comfort Partner shall observe the following in order to maintain status as a Home Comfort Partner with the Home Comfort program:**
 - The Home Comfort Partner shall submit, and have approved, a minimum of twenty (20) completed program applications in every 12 month cycle of participation in the program. Maintaining this requirement ensures consistent eligibility for program benefits (Tool and Software reimbursements) as well as your company listing on the Contractor Participation website.
 - Contractors who submit fewer than 20 completed and approved program applications will still be eligible to extend the rebates to their customers, however they will not be eligible to receive the full benefits of the program such as being listed on the participation webpage, or promotional materials upon PSEG/LI's discretion. Inadequate performance will also be reviewed for potential removal from the program including the ability to communicate to customers that the company is a PSEG/LI Home Comfort Partner.
 - The Home Comfort Partner must submit rebate applications and all required documentation within 90 days from system installation as stipulated on the 2021 Application Worksheet. If you are unable to satisfy this requirement, no contractor incentive will be paid on that application. All applications for systems installed in 2021 MUST be received by December 31st, 2021.
 - Any Home Comfort Partner with a post installation inspection failure rate of 10% or greater will not be eligible for contractor incentives and will be required to receive additional in field training and demonstrate their ability to comply with the Quality Installation standards required by the program prior to reinstatement of incentives.
 - If the Home Comfort Partner is unable to perform the airflow and charge testing, due to outdoor temperature restrictions, the completed Application must be submitted with the Airflow and Charge form when the weather permits. The Project Completion form must indicate the test will be conducted in warmer weather and submitted by June 30, 2022.
 - The Home Comfort Partner must provide the customer with the actual date the rebate application and supporting documentation was submitted to PSEG/LI for processing.

- The Home Comfort Partner shall accurately represent the relationship between the Contractor and the State of New York, PSEG/LI, and TRC Companies as follows - The Contractor is an independent contractor, and a participant in PSEG/LI's Home Comfort Program. Home Comfort Partners shall not represent themselves as working for, approved by, or certified by, the State of New York, PSEG/LI or TRC Companies.
 - The Home Comfort Partner shall maintain all relevant licenses required by federal, state, county or local governments or any agencies with jurisdiction over work performed. The Home Comfort Partner shall immediately report any loss of relevant licenses to PSEG Long Island. Any loss of pertinent licenses or unsatisfactory rating of business practices shall require dismissal of Home Comfort Partner from Program participation.
 - It is the sole responsibility of Home Comfort Partner and/or its subcontractors to obtain and comply with the terms of any required permits. The Home Comfort Partner shall provide evidence of the applicable documentation, including but not limited to permits and surveys, upon request.
 - The Home Comfort Partner shall provide all program customers with information materials as required by Home Comfort.
 - The Home Comfort Partner shall provide the customer with a written warranty of labor for a minimum of one (1) year from the date the service is performed and, for materials, and the equipment installed shall carry the full manufacturer's warranty. Occasionally, during Quality Control inspections, TRC Companies professionals may connect gauges or other testing devices to installed equipment. In the event that equipment malfunctions occur during TRC Companies testing, TRC Companies will, within reason, make repairs.
 - If a Home Comfort Partner becomes involved in a dispute with a customer over business practices, the Home Comfort Partner shall work with PSEG/LI and TRC Companies to resolve the dispute amicably. In any event, the Home Comfort Partner shall hold PSEG/LI and TRC Companies harmless from any suit arising from work performed under Home Comfort.
 - The Home Comfort Partner must disclose whether any individual(s) including owners, principles, shareholders, associates and employees affiliated with the Home Comfort Partner have previously participated in, or are currently participating in, any of PSEG/LI's programs including PSEG/LI Home Comfort. If so, list any and all individuals on the Signature Page of this document. This is an ongoing requirement. As such, the Home Comfort Partner shall notify PSEG/LI immediately of any changes or updates to this information.
- 5. The Home Comfort Partner shall recognize that participation in Home Comfort is a privilege:**
- PSEG/LI will not initiate processing of an application for Home Comfort incentives until a fully executed contract (Contractor Participation Agreement) between the Home Comfort Partner and Home Comfort is received. It is expressly understood that only quality installations made after the date of execution of the Contractor Participation Agreement will be eligible for submittal to Home Comfort.
 - The Home Comfort Partner acknowledges that failure to follow Program requirements and procedures, including processing of required documents, will result in a loss of applicable incentives, and possible suspension or termination of the Home Comfort Partner's participation in Home Comfort.

- The Home Comfort Partner acknowledges that participation in Home Comfort is a privilege, and that PSEG/LI or TRC Companies may suspend or terminate Home Comfort Partner’s participation in Home Comfort for any reason, including failure to maintain program standards. In all cases involving a Home Comfort Partner’s participation status, or denial of Home Comfort incentives, PSEG/LI’s written decision is final.
 - PSEG/LI reserves the right to make changes to the Home Comfort program requirements and incentives upon notice to the Home Comfort Partners. Such notification shall be by email and posting on www.psegliny.com/HomeComfort.
- 6. Indemnification** - The Participating Contractor shall protect, indemnify and hold harmless NYSERDA, PSEG Long Island LLC, Long Island Electric Utility Servco LLC, Long Island Power Authority, Long Island Lighting Company d/b/a LIPA, TRC Companies, its Implementation Contractors, and the State of New York from and against all liabilities, losses, claims, damages, judgments, penalties, causes of action, costs and expenses (including, without limitation, attorneys’ fees and expenses) imposed upon or incurred by or asserted against NYSERDA or the State of New York, resulting from, arising out of or relating to Participating Contractor’s or its sub-contractor’s performance of this Agreement, including, but not limited to, any claim or suit resulting from or related to mildew, fungus, moisture intrusion or mold of every type and nature. The obligations of the Participating Contractor under this Section shall survive any expiration or termination of this Agreement and shall not be limited by any enumeration herein of required insurance coverage.
- 7. Green Jobs – Green New York Financing** - The Green Jobs – Green New York (GJGNY) Act of 2009 established a revolving loan fund to provide loans to finance energy efficiency improvements. Participating Contractors have the availability to offer all customers this financing option. Participating Contractors need to become a participating contractor with Energy Finance Solutions (EFS) in order to offer this financing if they are not already an approved EFS participating contractor in another NYSERDA program. To become an EFS participating contractor, <http://www.energyfinancesolutions.com/forcontractors-documents-forms>.

Once accepted by EFS, your customers (site owner) have the ability to complete an online application <http://www.energyfinancesolutions.com/forhomeowners-apply-now> with EFS to determine loan eligibility. The customer should in turn receive a pre-approval letter.

Subsequently the following documents are required to be submitted to EFS for a project to be considered for a GJGNY loan:

- A completed Proforma analysis
- An executed construction contract
- A completion certificate

2021 Home Comfort Program Installation Incentives

For a current listing of installation rebate levels and eligibility requirements, see the 2021 PSEG Long Island Home Comfort Application Worksheet.

2021 Home Comfort Program Tool Incentives

Contractor Tool Incentives		
Eligible Tools	Proof of Purchase Requirements	Contractor Incentive
See attached Required Equipment List for eligible tools.	Copy of original receipt for purchase of eligible tools in support of the program.	After 20 approved applications, PSEG/LI will reimburse 75% of the cost of <u>eligible</u> tools purchased in support of the program.
ACCA approved Manual J v. 8 Software	Copy of original receipt, or vendor notification	After 20 approved applications, PSEG/LI will reimburse 50% of the cost of eligible software. (Program limit of one license for one seat per contractor applies)

Eligibility Requirements for Tool Incentives

- Only approved Home Comfort Partners will be eligible for the Contractor Tools Incentives
- To be eligible for the Contractor Tool Incentives and to be listed on the Participation Website, a total of 20 Home Comfort applications must be received and approved first.
- We reserve the right to limit equipment/software reimbursements. Therefore, we recommend contractors submit a written request with estimate for approval of reimbursement before purchases.
- ACCA approved Manual J (Version 8 or 9) Software may be purchased directly from vendors:
 - Elite Software RHVAC (www.elitesoft.com)
 - Wrightsoft Right-J8 (www.wrightsoft.com)
 - Adtek AccuLoads (www.adteksoft.com/software.htm)
 - Florida Solar Energy Center’s EnergyGauge (www.energygauge.com)
 - Avenir MJ8 Editions of HeatCAD® and LoopCAD® (www.avenir-online.com)
 - CarmelSoft HVAC ResLoad-J (www.carmelsoft.com) (for iPad)

(or visit <http://www.acca.org/software/> for current list of ACCA approved software available for purchase)

PSEG Long Island Home Comfort Program Eligible Equipment List

Equipment Eligible for PSEG/LI Reimbursement:

- **1 Fluke digital thermometer with two type K thermocouples.**
Fluke Model# 52
Graingers part # 4YV90
- **1 Fluke carrying case.**
Fluke Model #C90 Graingers part #1A742
- **2 -Fluke pipe clamp probes.**
Fluke Model #80PK-8. Graingers part #1W503
- **2 -Fluke type K thermocouples**
Fluke Model #80PK-1. Graingers part #1T322
- **1- 4 Valve Manifold Gauges w/ Enviro-Safe Hose Set for R-410A** Manufacture: J/B Industries
Mfg. # M45-410A : (3) 60” hoses included
CLB-60 : (1) Black Hose
Can order through Grainger or Johnstone Supply with special request for price.
- **1 DG 700 or DG 1000 Pressure and Flow Gauge**
Energy Conservatory (<http://www.energyconservatory.com/wp-content/uploads/2018/03/Systems-Price-List-March-2018.pdf>)
- **1 TrueFlow Air Handler Flow Meter kit**
Energy Conservatory (<http://www.energyconservatory.com/wp-content/uploads/2018/03/Systems-Price-List-March-2018.pdf>)
- **Electronic Charging Scale TIF**
Manufacture: TIF
Mfg# TIF9010A,
Johnstone # H25-270
- **Digital Vacuum Gauge**
Manufacture: Supco
Mfg. # VG-64
Johnstone # H26-062

*** True Flow Plate and DG 700 or DG 1000 manometer must be provided, without substitution. All other equipment brands are listed for example of quality and grade required; other brands of equal quality are acceptable.**

Home Comfort Program Contractors Equipment List

Items contractor are expected to have – NOT eligible for PSEG/LI reimbursement (including but not limited to):

- **Refrigerant Recovery Unit / weighs 35 lbs.**
Manufacture: Promax
Johnstone # H93-074
- **Recovery Cylinders with R-410A and R-22 labels**
Manufacture: Amtrol
Mfg. # 941-1169
Johnstone # H93-084
- **Vacuum Pump**
Manufacture: Robinair
Mfg. # 15400
Johnstone # H93-073
- **R Nitrogen Tank / 20 cu. ft.**
Johnstone # H93-091
- **Nitrogen Regulator (Delivery Pressure 500 PSIG / Gauge Delivery 600 PSIG)**
Manufacture: Prest-O-Lite
Mfg. # 21365
Johnstone # H25-204
- **2- Core Removal Tool**
Johnstone # H24-611
- **Refrigerant Leak Detector**
Model: TIFRX-1A
Brand: TIF
Johnstone # H85-25
- **Standard refrigeration/ Air Conditioning Hand tools**
- **Vacuum Pump Oil**
Manufacture: J/B Industries
Mfg. # DVO-12-BX Quart
Johnstone # H85-227
- **25 Lbs R-410A**
Johnstone # B92-910

2021 Home Comfort Program

Refrigerant Charge and Air Flow Testing Procedures

Determining Refrigerant Charge

(When outdoor temperature is above the required outdoor ambient temperature)

The contractor must use the superheat test (for fixed orifice/capillary systems) or the subcooling test (for TXV equipped systems) to determine proper refrigerant charge. For certain Lenox[®] brand equipment the “Approach” method may be utilized. Proper charge will be determined as $\pm 5^{\circ}$ F of the OEM-recommended optimal charge for the superheat method or $\pm 3^{\circ}$ F for the subcooling method. Superheat or subcooling tests must be done within the outdoor ambient temperature ranges as specified by the OEM, (typically 55° F or 60° F respectively).

(When outdoor temperature is below required outdoor ambient temperature)

The contractor will return to the installation when ambient conditions allow the more accurate charge and air flow test methods.

Determining Air Flow Across the Indoor Coil

The contractor may use these methods:

1. True Flow Plate and DG700 or DG 1000 manometer readings.
2. Measure total static and velocity pressures.
3. Pressure drop across coils as compared with values from the OEM CFM/pressure drop coil tables

Obtaining incentives

- The contractor must enter all relevant information on the Airflow & Refrigerant Charge Document and include OEM specifications as required.
- If the outdoor temperature is below required outdoor ambient temperature, the contractor will return to the installation when ambient conditions allow the more accurate charge and air flow test methods.
- The contractor must also fill out and submit the PSEG/LI Home Comfort application along with the results of ACCA Manual J v. 8 verifying that the installed system size is in compliance with the calculated load.
- PSEG/LI will initiate incentive payment after a complete PSEG/LI Home Comfort application has been received and verified. Some applications will be selected for field verification; incentive payment will be withheld until successful completion of the field verification.

(These procedures were freely adapted from the ANSI / ACCA 5 QI-2015 HVAC Quality Installation Specification.)

**2021 Home Comfort Program
Contractor Participation Agreement:
(Funded by PSEG Long Island)**

Signature Form

I have read, understand, and agree to comply with, all partnership commitments described in PSEG Long Islands 2021 Home Comfort Contractor Participation Agreement, including all supporting policies described or referenced therein. The provisions of this Agreement are effective from January 1, 2021 through December 31, 2021. PSEG Long Island reserves the right to modify, at any time during the term of this agreement, and the provisions of this Agreement.

PSEG Long Island may withhold incentives and/or suspend or terminate Contractor’s participation in Home Comfort for any reason, including failure to maintain program standards. Failure to follow requirements and procedures, including but not limited to, the processing of required documents, may result in a loss of incentives and/or suspension or termination of the Contractor’s participation in current or future iteration of Home Comfort. In all cases involving a Contractor’s participation status, or denial of incentives, PSEG Long Island’s written decision is final.

I certify, under the penalties of law, that the statements made in this Agreement have been examined by me and are true and complete. I understand that by signing this Agreement, I consent to any other inquiry to verify or confirm the information I have given.

Contact Information:

Company Name: _____
Company Address: _____
City: _____ State: _____ Zip: _____
Customer Contact Name: _____
Phone: _____ Fax: _____
E-mail: _____ Web Site: _____
Counties Served: _____

Tax ID #: _____

Name of Authorized Company Representative: _____

Title of Authorized Company Representative: _____

Signature / Date: _____ / _____

Please complete, sign and return this page. Keep a copy for your records.

Send to:

PSEG Long Island Home Comfort Program
c/o TRC Companies
395 North Service Road, Suite 409
Melville, NY 11747

Scan and email to: Joshua.Ebner@pseg.com

PSEG Long Island Authorized Signature /Date: _____ / _____