

Heat Pump Water Heater Form

All sections must be filled out by the installer at the time of installation. A copy of this completed form, the purchase receipt or invoice, and the manufacturer's Installation Checklist must be promptly submitted to the homeowner's utility in accordance with utility policy.

Household information

Modern Electric Water Company Account #:

Homeowner Name	Installation Address	City	State	Zip
Phone (with area code)	Mailing Address	City	State	Zip
Email		Year Built:	Heated Area (sq ft)	
Heating system: <input type="checkbox"/> Electric Furnace <input type="checkbox"/> Zonal Electric Resistance <input type="checkbox"/> Ductless Heat Pump <input type="checkbox"/> Ducted Heat Pump <input type="checkbox"/> Fireplace/Woodstove/Pellet stove <input type="checkbox"/> Gas Furnace <input type="checkbox"/> Other (specify):				
Air Conditioning: <input type="checkbox"/> None <input type="checkbox"/> Central <input type="checkbox"/> Zonal (window and/or wall units) <input type="checkbox"/> Evaporative cooler				
Number of occupants:	Number of water heaters:	House Type: <input type="checkbox"/> Site Built <input type="checkbox"/> Manufactured Home		
Information about the water heater being replaced (this row only)	Fuel <input type="checkbox"/> Electric <input type="checkbox"/> Gas	Age (years):	Size (gallons):	Functional? <input type="checkbox"/> yes <input type="checkbox"/> no

Installation Information

Brand Installed	Model	Size (gallons):	Date of installation:
Other Appliances in installation room: <input type="checkbox"/> Clothes dryer <input type="checkbox"/> Fridge <input type="checkbox"/> Freezer <input type="checkbox"/> Furnace <input type="checkbox"/> Other (specify):			
Where was this water heater purchased? <input type="checkbox"/> Installer <input type="checkbox"/> Retailer <input type="checkbox"/> Online <input type="checkbox"/> Other (specify):			
Total installed cost (before rebates): \$ _____ Break down cost into the categories below: Equipment: \$ _____ Labor: \$ _____ Electrical: \$ _____ Other: \$ _____ Specify: _____			
Installation location: <input type="checkbox"/> Conditioned space <input type="checkbox"/> Unconditioned space Specify: <input type="checkbox"/> Garage <input type="checkbox"/> Basement <input type="checkbox"/> Closet <input type="checkbox"/> Utility room <input type="checkbox"/> Laundry room <input type="checkbox"/> Other:			
Installation room size (feet): (length _____) x (width _____) x (height _____) = _____ cu.ft.			
Installation clearances: Air inlet side (ft) _____ Air outlet side (ft) _____ Back (in) _____ Front (ft) _____ Top (in) _____			
Information about ducted Installations	CO Monitor Location:	Ducted out of conditioned space? <input type="checkbox"/> yes <input type="checkbox"/> no	Length of intake duct (ft): _____ Length of exhaust duct (ft): _____
A select group of homeowners installing ducted heat pump water heaters will be contacted to participate in a study to measure energy and water use. To opt out of this study group, please check here. <input type="checkbox"/>			

Installation Checklist

(Complete in addition to the manufacturer's checklist)

Follow the manufacturer's installation instructions <u>exactly</u> . Failure to do so will result in disqualification from the program, may void the manufacturer's warranty, and may result in lower than expected energy savings.	
<input type="checkbox"/> There is adequate clearance to remove the air filter <input type="checkbox"/> Earthquake strapping is installed <input type="checkbox"/> Installation complies with code <input type="checkbox"/> Condensate line drains at a slope to a drain or exterior location	<input type="checkbox"/> Temperature and Pressure relief valve is properly installed and not plugged <input type="checkbox"/> Homeowner is aware of cooling effect and noise levels to expect in the installation area <input type="checkbox"/> Homeowner understands maintenance requirements <input type="checkbox"/> Homeowner understands the safety instructions

Required Homeowner and Technician Signatures Both signatures are required. If installed by the homeowner, the homeowner must also sign the installer section.

By signing below, the homeowner certifies that they understand and agree that they may be contacted for the purpose of scheduling an on-site installation quality assurance visit by a representative of the Heat Pump Water Heater (HPWH) program. This form must be signed by the person whose name appears on the electric utility account. ENERGY INFORMATION RELEASE: The undersigned utility customer requests and authorizes the specified utility to release billing and usage information for the account listed below to the HPWH program. With this authorization, the HPWH program can request billing information for up to two years pre-installation and two years post-installation. The utility customer also hereby releases the utility company from any and all liability arising from or connected with providing this information.

A copy of the purchase receipt or installer's invoice is included with this application.
 A completed copy of the manufacturer's Installation Checklist is included with this application.

Electric Utility: Modern Electric Water Company	Account #:
Account holder name:	
Account holder signature:	Date:
By signing below, installer certifies that this form and any accompanying documentation are complete and accurate; that all measures associated with this project were completed as of the signature date below; that all equipment was installed according to the manufacturer's specifications and any additional specifications required by Bonneville Power Administration; and that unit is functional and operational prior to submission of this rebate form.	
Manufacturer Training Location:	Date of Training:
Installer name:	<input type="checkbox"/> Contractor <input type="checkbox"/> Non-contractor or Homeowner
Installer signature:	Date:

PRIVACY ACT STATEMENT Basic authority for collecting this information is authorized by 16 U.S.C. §§ 832 et. seq., and 838 et. seq., pursuant to Bonneville Power Administration's Conservation Program system of records established in 46 FR 31700. This information is primarily intended to further, but is incidental to the performance of, BPA's overall Energy Efficiency Program, the objective of which is to acquire energy resources through energy efficiency, to determine what cost-effective conservation and direct application renewable resources measures should be installed or adopted under different circumstances, and to provide incentives for the installation of such measures. Other routine issues of this information include: aggregation into a public database on energy efficiency; furnished to authorized personnel for installation/repair of equipment; aggregated into a database for program publicity; and in some instances information regarding buildings will be made available to subsequent purchasers of the buildings. Your disclosure of the requested information is voluntary; however failure to provide requested information means that it will not be possible for you to participate in this BPA Energy Efficiency program.

CIRCLE REBATE AMOUNT FOR NEW EQUIPMENT			
Residence Type	Measure	Rebate Amount	Minimum Installation Requirements
New Construction, Site Built & Manufactured Homes	one Heat Pump Water Heater per existing residence	\$300	Any Tank size Tier 1
New Construction, Site Built & Manufactured Homes	one Heat Pump Water Heater per existing residence	\$500	Any Tank size Tier 2 - 3

Rebate will not exceed 100% of the cost of the Heat Pump Water Heater

Please return this form to:

**Modern Electric Water Company
 Attn: Energy Efficiency Rebates
 5605 NE Elam Young Parkway
 Hillsboro, OR 97124
 FAX: 1-503-344-6942
 rebates@esgroupllc.com**

RESIDENTIAL HEAT PUMP WATER HEATER REBATE PROGRAM General Information

HOMES THAT QUALIFY FOR A REBATE

- New Construction Homes qualify for one HPWH per residence.
- Site Built Homes & Manufactured Homes are eligible for one HPWH per existing residence replacing an electric water heater.

REBATE AMOUNT

- \$300 rebate for approved heat pump water heater any size tank Tier 1
- \$500 rebate for approved heat pump water heater any size tank Tier 2 & Tier 3

LEARN ABOUT HEAT PUMP WATER HEATERS

- What is a Heat Pump Water Heater and how does it increase efficiency? Find out at hotwatersolutionsnw.org!

INSTALLER REQUIREMENTS

- Your installation contractor must be listed on the website hotwatersolutionsnw.org. If the contractor is not on the list, they must go through the training at: <http://www.bpa.gov/EE/Sectors/Residential/Pages/Heat-Pump-Water-Heaters.aspx>
- Self-installers must watch online training for their specific products' installation: <http://www.bpa.gov/EE/Sectors/Residential/Pages/Heat-Pump-Water-Heaters.aspx>

BEFORE INSTALLATION: PRE-APPROVAL

- An on-site visit is *not* required prior to installation to qualify for the rebate.
- You or your contractor must submit the HPWH Rebate Application to Modern Electric Water (MEWCO) before installation to verify that the model qualifies for the rebate.
- Email to: rebates@esgroupllc.com or fax to: 503-344-6942
- Pre-installation approval *is* required to qualify for the rebate.

AFTER INSTALLATION: FINAL DOCUMENTATION

- You or your contractor must submit a completed Heat Pump Water Heater Rebate Application and final invoice to MEWCO to the fax, email or mailing address listed on the last page of this document.

QUALITY ASSURANCE INSPECTION

- MEWCO may do a follow-up inspection of your new Heat Pump Water Heater.
- If you are chosen for an inspection, you will be contacted beforehand to schedule a day/time with a MEWCO field representative.

CUSTOMER REBATE CHECKS

After MEWCO receives your complete rebate application and final invoice, it takes approximately 8 - 10 weeks for rebate checks to be issued and mailed.

For additional questions regarding the Modern Electric Water Company Heat Pump Water Heater Rebate Program, call 1-888-883-9879.

DO-IT-YOURSELF INSTALLATION TIPS for

Heat Pump Water Heaters

■ ■ Before you begin...

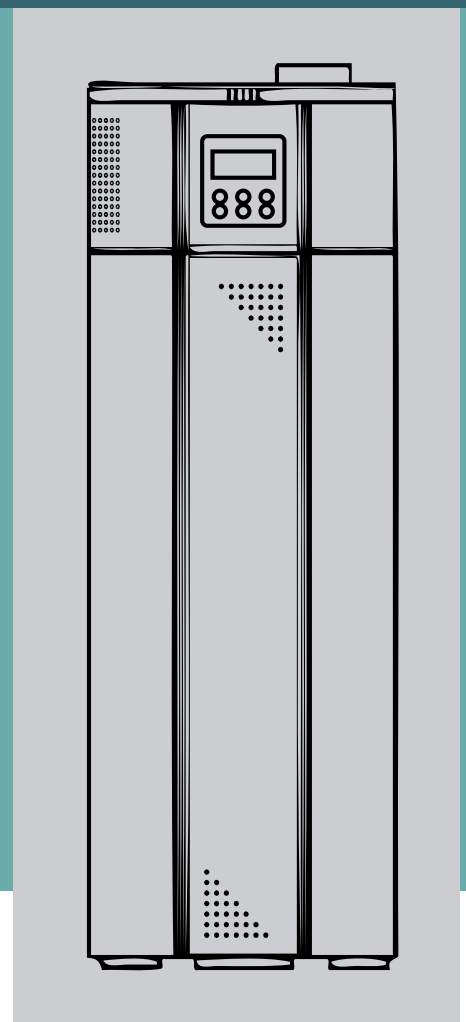
Familiarize yourself with all elements of installing an electric water heater. This sheet provides you with tips specific to the additional steps required to install a heat pump water heater; it is not an installation guide. It does not serve as a replacement for manufacturer instructions.

DO YOUR HOMEWORK

- Review manufacturer's installation instructions and any supplementary resources, such as videos, that may be available.
- If you do not feel comfortable installing a standard electric water heater, do not attempt to install a heat pump water heater.
- Verify that your installation will be in compliance with all code and permitting requirements.
 - Oregon: cbs.state.or.us/bcd
 - Idaho: dbs.idaho.gov
 - Washington: <https://fortress.wa.gov/ga/apps/sbcc> or lni.wa.gov
 - Montana: bsd.dli.mt.gov/bc/bs_index.asp
- Ensure that your installation meets utility rebate and/or tax credit requirements. Visit SmartWaterHeat.org/Rebates for more information.

Parts to have ready

- Electrical tape
 - Wire nuts
 - Teflon thread tape
 - Water supply pipes
 - Push-fit connectors do not require soldering; verify local code compliance
 - Pipe connector for temperature/pressure relief valve pipe
 - PVC pipe and accessories for condensate lines
 - PVC connectors – threaded for condensate outlet connection (both 45° and 90° elbows)
 - Pipe hangers
 - PVC glue
 - Pipe insulation
 - Earthquake straps
 - Wood or other spacing blocks
 - Shims
- Optional:**
- Condensate pump
 - Clear vinyl tubing, sized for condensate pump and sufficient length to reach drain
 - Tubing hangers
 - Drain pan to sit beneath unit
 - New unit may have a larger circumference than existing tank
 - Thermal expansion tank if required by local code



Tools to have ready

- Pipe cutter or hacksaw
- Measuring tape
- Gloves
- Plumber's wrench
- Screwdrivers
- Drill
- Level
- Ladder
- Electrical current tester or voltmeter
- Socket wrench
- Garden hose



1. REMOVE EXISTING UNIT

- Turn off power to the existing unit at the breaker box and disconnect electrical connections.
- Turn off water to the existing unit and disconnect water connections, leaving some pipe for new connections.
Note: Use a hacksaw or pipe cutter for this step.
- Remove existing unit.



2. POSITION NEW HEAT PUMP WATER HEATER

- Place drain pan in desired installation location, ensuring proper space between unit and wall.
 - Unless ducted, most units require at least 1,000 cubic feet of air-flow around them to draw air from. This is the equivalent of a 10'x12'x8' space.
 - Installation in an outdoor or unprotected area is not recommended.
 - Position the unit so the air filter, cover and front panels can be easily accessed for inspection and servicing.
- Place the new unit inside the drain pan.
Note: Heat pump water heaters are much heavier than standard electric units, and are very top heavy. Use care when moving.
- Attach earthquake straps that comply with manufacturer's clearance requirements and local code. If necessary, attach blocks to studs using appropriate anchors and maintain proper spacing from wall when straps are tightened.



3. INSTALL FILTER

- Ensure installation location allows access to air filter, which must be cleaned regularly. See the manufacturer's manual for cleaning schedule.
- Some filters lift up, while other filters are accessed on the side of the unit.



4. LEVEL UNIT

- Ensure the unit is level, using shims if necessary.
- Like a refrigerator, leveling ensures the unit operates properly.
- Some local codes require the unit to sit on a stand, check with your city for requirements.



5. CONNECT PIPES

- Connect water pipes in accordance with manufacturer's instructions.
Note: Flexible pipe connections may be allowed and require no soldering, clamps, unions or glue.
- Use teflon tape on all threaded connections.
- Install temperature/pressure relief valve (TPV) per installation instructions and local codes.



6. INSULATE HOT WATER SUPPLY

- Insulate hot water supply with flexible insulation to help maximize energy savings.



7. INSTALL ELECTRICAL CONNECTIONS

- Install electrical connections in accordance with manufacturer installation instructions.
Note: Verify proper voltage with electrical current tester or voltmeter.



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8. ADDRESS CONDENSATE MANAGEMENT

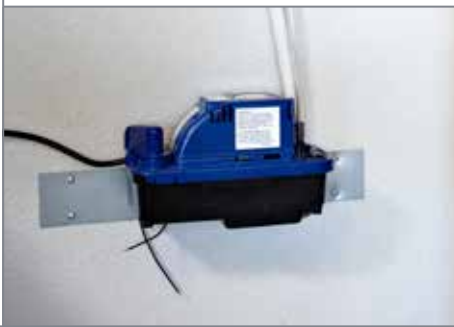
- Identify condensate drain port(s) and choose the most appropriate drainage method for your installation.
- Attach PVC pipe to drain port and route in a downward slope to either a floor or sink drain.

Note: If there is not a drain nearby, a condensate pump is required (see below).

- If drainage pipe is directed outside, ensure pipe will not freeze.

Condensate Pump Installation Tips

- Install condensate pump per manufacturer instructions.
- Most condensate pumps can be attached to a wall hanger and plugged into a standard 115W outlet.
- Ensure tubing is connected securely to pump output and drains to a suitable termination point.
- Tubing may need to be routed up and over surrounding rooms.
- To help pull tubing through insulation and/or areas with limited access, attach a long PVC pipe to tube and gently pull tube through.
- Tubing and pipe hangers can be installed on condensate lines to prevent slippage and achieve a cleaner look.



9. FILL TANK

- Double-check connections to ensure there are no leaks.
- Turn on a hot water faucet in the house to allow air to escape the new tank as it is filled.
- Turn on cold water supply to the unit.
- When the hot water faucet in the house has a steady stream, the tank is full.



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10. START YOUR HEAT PUMP WATER HEATER

- The heat pump water heater is ready to turn on. Turn on the power to the unit at the breaker.
- Verify the condensation pump is working properly by filling it slowly with water until the pump engages.
- Refer to manufacturer's operation manual and Smart Water Heat's Homeowner Quick Reference Guide for maintenance and operation guidelines.

Disclaimer: This document provides general tips for a quality installation of a heat pump water heater; it is not an installation guide. For complete information regarding installation requirements, features, benefits, operation and maintenance, review the manufacturer's installation manual for the installed product. Images of specific manufacturer product lines are not placed as endorsements nor does this guide guarantee their quality.

Smart Water Heat is an initiative of the Northwest Energy Efficiency Alliance, an alliance of Northwest utilities and energy efficiency partners.