

Home Renovation Savings Program – Heat Pump Program Stream – Program Stream Requirements

1. Program Description

The Home Renovation Savings Program (the “**Program**”) is a residential energy efficiency and demand-management program jointly offered and administered in Ontario by Enbridge Gas Inc. (“**Enbridge**”) and the Independent Electricity System Operator (the “**IESO**”) (collectively, the “**Program Administrators**”). The Program provides financial incentives (including rebates) to eligible Participants for the installation or implementation of certain energy efficiency measures. The Home Renovation Savings Program – Heat Pump Program Stream (the “**Program Stream**”) offers eligible Enbridge customers or those eligible with oil, propane, wood, or electrically heated homes, with financial incentives towards the purchase or rental of high-efficiency heat pumps (each an “**HP**”) to help manage their energy use more effectively.

This Program Stream may be delivered on behalf of the Program Administrators by the Program Delivery Agent(s).

To be eligible to participate in this Program Stream, a Participant must:

- (a) be either (i) an Enbridge residential customer whose home is primarily heated by a natural gas furnace or boiler, or (ii) a residential homeowner that has an oil, propane, wood, or electric-resistance heated home connected to the IESO-Controlled Grid through an Ontario local electric utility or distribution company (excluding Cornwall Electric, whose customers are not connected to the IESO-Controlled Grid); and
- (b) meet the eligibility requirements specified in these Program Stream Requirements and the Heat Pump Program Stream – Participant Agreement.

2. Program Stream Offer

This Program Stream provides an Eligible Measure Rebate for the following Eligible Measures, calculated in accordance with the Eligible Rebates List:

- A rebate for the purchase and installation of an eligible HP that is a centrally ducted (central system), partially ducted, or a ductless cold climate air source heat pump (“**ccASHP**”), including mini and multi splits, or a ground source heat pump (“**GSHP**”), subject to the eligibility requirements set out in Section 3.

Eligible Rebates List

Equipment Ownership	Baseline Heating Fuel (prior to heat pump installation)	Heat Pump Measures	Eligible Measure Rebate	Qualifiers
Owned	Electricity / Oil / Propane / Wood	ccASHP Full Equipment	\$1,250/ton*	Up to \$7,500
		GSHP Full System	\$2,000/ton*	Up to \$12,000
	Enbridge Natural Gas	ccASHP Full Equipment	\$500/ton*	Up to \$2,000
		GSHP Full System	\$3,000	Flat rate
Rental	All	ccASHP Full Equipment	\$500/ton*	Up to \$2,000
		GSHP Full System	\$3,000	Flat rate

*Incentives for ccASHPs will be calculated based on the total rated heating capacity at 8.3°C (47°F). Incentives for GSHPs for electrically heated homes or those primarily heated with oil/propane/wood will be calculated based on closed loop heating capacity. For GSHPs categorized as open loop only, the incentive will be calculated based on the open-loop heating capacity

2.1 Application Process

2.1.1 Pre-Installation

Participants must select an HVAC Contractor from the Participating HVAC Contractor List to install the Eligible Measures. The HVAC Contractor is responsible for submitting all relevant information and documentation on the Participant's behalf. Before the installation of the Eligible Measure, the HVAC Contractor will be required to submit a Pre-Installation Application.

The Pre-Installation Application requires the following information and documentation to be submitted:

- A copy of the Work Order, which must be fully itemized and include all the details as shown in the [sample invoice](#).
- Photos of the existing heating system and the corresponding nameplate(s). For Enbridge natural gas and oil and propane heated homes, this includes, but is not limited to, photos of the existing furnace or boiler and associated nameplates. For electrically heated homes, this includes photos of the existing air handler or electric baseboards and associated nameplates. Baseboard photos must be shown for at least 3 areas in the home. Wood heated homes should submit photos of their wood stoves, etc.
- A signed Participant Agreement.
- Completed NRCan ASHP Sizing and Selection Tool form for each ccASHP system being installed at the Eligible Home (using either the [Excel-based tool](#) published on the Natural Resources Canada website or the newly published [web application](#)). Please note:
 - The Excel-based tool offers some advanced features but is research oriented, does not work on Mac, and may be less accessible to some users. The web application may be more suitable for most users.
 - For instances where it is necessary for multiple ccASHP Eligible Measures to be installed in an Eligible Home in order to meet the General Measure Eligibility requirements specified in Sections 3.3.2(a) and (b), there should be one NRCan tool submission per outdoor unit being installed. The HVAC Contractor must determine the loads covered by each outdoor unit (i.e. which requires determining the indoor zone(s) served by the associated indoor unit(s)). This process would be applicable if using the web application or the Excel-based tool.
- For oil or propane heated homes, Contractors must submit an Oil/Propane Tank Removal Attestation Form, signed by the Participant.
- Any other information required or requested by the Program Administrators

The HVAC Contractor and prospective Participant must receive the Program Administrators' written approval of their Pre-Installation Application (as determined at the sole discretion of the Program Administrators) before proceeding with installing the Eligible Measures. If the Pre-Installation Application is approved, the signed Participant Agreement will be accepted by the Program Administrators as of the date of signature (subject to the prospective Participant satisfying all other Program Stream requirements, including but not limited to the requirements set out herein). If the Pre-Installation Application is not approved, the prospective Participant will not be eligible to receive an Eligible Measure Rebate and the Participant Agreement will not be accepted by the Program Administrators.

2.1.2 Post-Installation

Within 30 days following the installation of the Eligible Measures, the HVAC Contractor must submit the Post-Installation Application, which includes:

- A copy of the final invoice or signed rental agreement. The final invoice must be fully itemized and include all the details as shown in the [sample invoice](#).
- Photographs of the installed Eligible Measure(s) as well as the thermostat.
- Measure and installation-related information.
- Any other documentation required by the Program Administrators.

The Participant and the HVAC Contractor will be notified in writing of whether the Post-Installation Application is approved (as determined at the sole discretion of the Program Administrators). If the Post-Installation Application is approved, the Participant will be eligible to receive the applicable Eligible Measure Rebate. If the Post-Installation Application is not approved, the Participant will not be eligible to receive an Eligible Measure Rebate.

3. Program Eligibility Criteria

3.1 Participant Eligibility

To be eligible to participate in the Program Stream, the prospective Participant must:

- a) own the Eligible Home where the Eligible Measure will be installed (tenants cannot apply on behalf of the homeowner);
- b) be the Person responsible for paying for the purchase and installation of the Eligible Measure;
- c) sign a Participant Agreement which is submitted to the Program Administrators by a participating HVAC Contractor as part of the prospective Participant's Pre-Installation Application; and
- d) for homes heated by oil or propane, sign an Oil/Propane Tank Removal Attestation Form.

3.2 Residence Eligibility

To be considered an “**Eligible Home**” under the Program Stream, the residence where the Eligible Measure will be installed must:

- a) be subject to and associated with an active Enbridge residential account **or** be connected to the IESO-Controlled Grid through an Ontario local electric utility or distribution company (excluding Cornwall Electric);
- b) be primarily heated with a natural gas furnace or boiler, **or** have an oil, propane, wood, or electric resistance heating system as the residence's primary heating equipment;
- c) be a residential property that is a single detached, semi-detached, row house, townhome, or mobile home on a permanent foundation
- d) not have an existing heat pump system used for space heating (replacements of existing heat pump systems **are not** eligible for an Eligible Measure Rebate under the Program Stream)
- e) not be a 'new build home' (the new home must have been occupied for at least 6 months to be considered an Eligible Home)

3.3 Measures Eligibility

3.3.1 ccASHP and GSHP Measure Eligibility

Participants are eligible to receive one Eligible Measure Rebate per Eligible Home. For instances where it is necessary for multiple ccASHP Eligible Measures to be installed in an Eligible Home in order to meet the General Measure Eligibility requirements specified in Sections 3.3.2(a) and (b), the Eligible Measure Rebate will be

calculated in accordance with the chart in Section 3.3.1.1 g). To be eligible to receive an Eligible Measure Rebate, the Participant must install either a ccASHP or GSHP that meets the specific eligibility requirements outlined in Sections 3.3.1. and 3.3.2.

3.3.1.1 ccASHP

The installed ccASHP must be an active ccASHP model that is listed on the [NRCAN Eligible Product Lists for Air Source Heat Pumps and Cold Climate Heat Pumps](#) (published on the NRCAN website) and meets the Minimum ccASHP Efficiency Requirements specified in Section 3.3.1.1 f). Any measure with a de-listed, inactive, or archived status on the NRCAN list does not qualify for an Eligible Measure Rebate. The ccASHP must also meet the following requirements:

- a) For eligible gas heated homes and propane heated homes, NRCAN sizing options A - D are eligible for an Eligible Measure Rebate, as described in the [ASHP sizing and selection guide](#), where the sizing options are defined as:
 - i. **Sizing Option A: Emphasis on Cooling** – ccASHP sized for cooling, with some heating in mild weather.
 - ii. **Sizing Option B: Balanced Heating and Cooling** – ccASHP heating ranges from most of the heating in mild weather, to most of the heating over the heating season.
 - iii. **Sizing Option C: Emphasis on Heating** – ccASHP provides most of the heating in mild to cold weather in most climate regions.
 - iv. **Sizing Option D: Sized on Design Heating Load** – ccASHP provides all or nearly all of the heating requirements over the full heating season.
- b) For oil, wood or electrically heated Eligible Homes connected to the IESO-Controlled Grid, only NRCAN sizing options C and D are eligible for an Eligible Measure Rebate. For homes with oil heating systems, Participants must transition their heating system to an electric heat pump and work with a TSSA registered contractor to maintain, empty and/or remove their oil above ground storage tank ("AST") or underground storage tank ("UST", each a "**Storage Tank**"), associated piping, and components in accordance with all applicable laws. Additional details can be found in the [NRCAN Guide](#). The Program Administrators reserve the right to request additional justification or documentation for HP sizing.
- c) The following ccASHP system types are eligible:
 - i) Centrally ducted (central system) ccASHP systems.
 - ii) Ductless or partially ducted mini-split ccASHP systems.

These include "single head" (one indoor unit per outdoor compressor) and "multi-split" or "multi-head" (more than one indoor units per outdoor compressor) systems, provided the installed system(s) meet the heat distribution requirements specified in Section 3.3.2.
- d) The ccASHP installation must include all components of the heat pump system. For mini or multi split systems, this means both the indoor and outdoor units. For central systems, this means the outdoor and indoor units, as well as the furnace or air handlers as applicable (note that either a new or existing furnace or air handler can be used).
- e) Air to water systems are not eligible for an Eligible Measure Rebate.
- f) The ccASHP must meet, the following Minimum ccASHP Efficiency Requirements under this Program Stream:

Minimum ccASHP Efficiency Requirements

Criteria	Specification
Type	ccASHP
HSPF2 Region V	6.6
SEER2	15.2
System Heating Rated Capacity at 8.3°C (47°F) BTU/HR	12,000
COP -15°C (5°F) at max capacity operation	1.8
Capacity maintenance (max -15°C (5°F))/Rated 8.3°C (47°F), %	70
Product Status	Live / Active
Variable capacity*	Yes
Sold in	CA

*with three or more distinct operating speeds or continuously variable speed

- g) For instances where it is necessary for multiple ccASHP Eligible Measures to be installed in an Eligible Home in order to meet the General Measure Eligibility requirements specified in Sections 3.3.2(a) and (b), the Eligible Measure Rebate will be calculated in accordance with the chart below. Up to three ccASHP Eligible Measures may qualify towards an Eligible Measure Rebate.

Eligible Measure Rebate Calculation for Multiple ccASHP Eligible Measures Installed in an Eligible Home:

Example	ccASHP rated heating capacity at 8.3°C (47°F)	Total system size	Rebate amount
1	Unit 1 – 36,000 btu/hr (3 tons)	3 tons + 3 tons = 6 tons	Enbridge Gas customer or rental = \$2,000 (max)
	Unit 2 – 36,000 btu/hr (3 tons)		Electric/oil/propane/wood = \$7,500
2	Unit 1 – 12,000 btu/hr (1 ton)	1 ton + 2 ton = 3 tons	Enbridge Gas customer or rental = \$1,500
	Unit 2 – 24,000 btu/hr (2 ton)		Electricity/oil/propane/wood = \$3,750

3.3.1.2 GSHP

If the GSHP is a Water-to-Air GSHP, it must be an active GSHP model that is listed on the [NRCAN Eligible Product Lists for Ground Source Heat Pumps](#) (published on the NRCAN website). Any unit with a de-listed, inactive, or archived status on the NRCAN list does not qualify for an Eligible Measure Rebate. Water-to-Water GSHPs must be on the [Energy Star Certified Geothermal Heat Pump list](#) and available in Canada. The GSHP must also meet the following eligibility requirements:

- It must be a full GSHP system installation (including both indoor and outdoor components) and meet [Canada's Energy Efficiency Regulations](#) and/or [O.Reg 509/18](#).
- Water-to-Water GSHPs must also submit their [AHRI certificate](#).
- Direct expansion (DX) systems are not eligible for an Eligible Measure Rebate.
- It is highly recommended that Participants request that their HVAC Contractor sign an attestation

form confirming that the installation has been completed according to the CSA standard – ANSI/CSA/IGSHPA C448 series “Design and installation of ground source heat pump systems for commercial and residential buildings”. The link to the standard can be found here ([ANSI/CSA/IGSHPA C448 SERIES](#)).

- e) For oil, wood or electrically heated Eligible Homes connected to the IESO-Controlled Grid, the GSHP must be sized to meet the full heating load. Participants must transition their home heating system to an electric heat pump system and work with a TSSA registered contractor to maintain, empty and/or remove their oil Storage Tank, associated piping, and components in accordance with all applicable laws.
- f) The ground loop sizing and heat pump capacity must be appropriate for the home's heating load.

3.3.2 General Measure Eligibility

The installed ccASHP or GSHP Eligible Measure must also meet the following requirements:

- a) The Eligible Measure and any connected ductwork must:
 - i) be properly sized to ensure occupant comfort and satisfaction, and optimize system performance and energy savings, and
 - ii) comply with all applicable laws, building codes and guidelines, and any additional permitting requirements.
- b) The Eligible Measure must be capable of distributing heat throughout the entire Conditioned Space in the house, including the basement (if applicable). The HVAC Contractor is responsible for specifying (including load calculations, sizing and selection) and installing the Eligible Measure to meet this requirement.
- c) The installed Eligible Measure must be capable of operating year-round (i.e., providing heating and cooling).
- d) The Eligible Measure must include all components of a heat pump system, including indoor and outdoor units, as well as the furnace and air handler (if applicable). All components must be compatible with one another.
- e) Existing or new backup heating sources may be used. This may include natural gas furnaces or boilers (if the Eligible Home is heated by Enbridge-supplied natural gas) or electric-resistance heating if the Eligible Home is connected to the IESO-Controlled Grid.
 - i) For natural gas-heated and propane-heated Eligible Homes where the Eligible Measure will be paired with a natural gas or propane furnace, either a new or existing furnace may be used. However, existing or new backup heating sources are not considered Eligible Measures and do not qualify for an Eligible Measure Rebate.
 - ii) For wood and electrically heated Eligible Homes connected to the IESO-Controlled Grid, Participants may keep their existing wood or electric-resistance heating as a backup. However, the existing backup heating source is not considered an Eligible Measure and does not qualify for an Eligible Measure Rebate.
 - iii) For oil-heated Eligible Homes connected to the IESO-Controlled Grid, participants must transition their home heating system to an electric heat pump system and work with a TSSA registered contractor to maintain, empty and/or remove their oil Storage Tank, associated piping, and components in accordance with all applicable law. These Participants may install electric resistance heating, where back-up heat is necessary. However, the backup heating source is not considered an Eligible Measure and does not qualify for an Eligible Measure Rebate.
- f) The installation of the Eligible Measure must be completed in accordance with these Program

Stream Requirements, by a licensed and trained HVAC Contractor who is selected by the Participant from the Participating HVAC Contractor List.

3.4 HVAC Contractor Eligibility Requirements

The Participant must use an HVAC Contractor that is included on the Participating HVAC Contractor List for the installation of the Eligible Measure. All participating HVAC Contractors must complete a registration form, meet certain eligibility criteria, sign the Heat Pump Program Stream HVAC Contractor Terms and Conditions, and be approved by the Program Delivery Agent to participate in the Program Stream.

Note that, the Program Administrators may for any reason, deny an HVAC Contractor's application to be included on the Participating HVAC Contractor List or remove an HVAC Contractor from the such list at any time. Reasons for denying approval or for removal from the Participating HVAC Contractor List may include, but are not limited to, public health and safety concerns, consumer protection concerns, customer service issues, evidence of non-compliance with applicable laws (including TSSA technical standards), providing misleading information, or engaging in fraudulent or criminal activities.

As part of their review of HVAC Contractor applications to be added to the Participating HVAC Contractor List, the Program Administrators may review past behaviour in Enbridge or IESO programs and publicly available information to assess and confirm eligibility to be included on the Participating HVAC Contractor List and participate under the Program Stream.

For certainty, the Participating HVAC Contractor List is specific to heat pump-related services. If you have an oil or propane-heated home and will be emptying and/or removing your oil/propane heating system and/or Storage Tank, please work with a TSSA registered contractor that is experienced in performing such services in accordance with all applicable laws.

The minimum business and technical criteria for an HVAC Contractor to be approved to participate in the Program Stream will be specified by the Program Administrators in the application process. These criteria may be subject to change by the Program Administrators upon written notice and HVAC Contractors may be re-evaluated based on the new criteria. At a minimum, to be eligible to be included on the Participating HVAC Contractor List, the HVAC Contractor must meet the following eligibility requirements:

Business Requirements

- Must hold a valid Ontario Business License;
- Must have at least two years of consecutive heat pump business in Ontario;
- Must have at least 1 year of preventative maintenance and warranty services; and
- Must have and maintain insurance coverage with a reputable and financially creditworthy insurer, that is appropriate to the nature of the services the HVAC Contractor will perform under the Program Stream.

Technical Requirements

- holding a valid residential Air Conditioning Systems Mechanic License 313D or 313A to install ccASHP Eligible Measures;
- holding a valid Technical Standards and Safety Authority (TSSA) registration certificate and/or registration;
- holding a valid Ozone Depletion Prevention certificate;
- holding a valid IGSHPA certification to install GSHP eligible measures; and
- having completed technical training, which may include, but is not limited to, participation/attendance in

educational courses on sizing and design for Eligible Measures, and/or completion of manufacturer training for applicable Eligible Measures.

3.5 Other Funding Sources

The purchase of Eligible Measures must follow the following guidelines:

- a) The Participant acknowledges and agrees that the Participant will **not** be eligible to receive any Eligible Measure Rebate in respect of any Eligible Measures for which the Participant has already received, or expects to receive, a financial incentive or rebate under any other Enbridge, IESO Save on Energy, or Government of Ontario program.
- b) Combined funding received from any other source (that is not listed in 3.5a) is not to exceed 100% of the costs associated to supply and install the Eligible Measure.

4. DEFINITIONS

The following terms have the meaning stated below when used in these Program Stream Requirements:

"Application" means any application that must be completed and submitted in order to participate in and be eligible to receive any Eligible Measure Rebate under the Program Stream. This includes the Pre-Installation Application and Post-Installation Application, and any required supporting information and documentation. The relevant HVAC Contractor is required to submit the Application on behalf of the Participant.

"ccASHP" means cold climate air source heat pump.

"Conditioned Space" means space within a building in which the temperature is controlled (heating or cooling).

"Eligible Home" means a home that meets the residence eligibility criteria set out in Section 3.2.

"Eligible Measure" means a measure that meets the measure eligibility criteria set out in Section 3.3.

"Eligible Measure Rebate" means the rebate amount that the Program Administrators will pay to the eligible Participant for each installed Eligible Measure, calculated in accordance with the Eligible Rebates List.

"Eligible Rebates List" means the list of Eligible Measures and associated Eligible Measure Rebates under the Program Stream, as set out in Section 2.

"Governmental Authority" means any federal, provincial, or municipal government, parliament or legislature, or any regulatory authority, agency, tribunal, commission, board or department of any such government, parliament or legislature, or any court or other law, regulation or rule-making entity, having jurisdiction in the relevant circumstances, including, without limitation, the IESO in its capacity as the operator of the IESO-Controlled Grid, the Ontario Energy Board, the Electrical Safety Authority, the Office of the Auditor General of Ontario, and any Person acting under the authority of any of the foregoing, but excluding the IESO.

"GSHP" means ground source heat pump.

"HVAC Contractor" means a licensed contractor who is listed on the Participating HVAC Contractor List and is selected by a Participant to install Eligible Measure(s) within an Eligible Home.

"IESO-Controlled Grid" has the meaning given to it in the IESO Market Rules.

"IESO Market Rules" means the rules made under section 32 of the *Electricity Act, 1998* (Ontario), together with all market manuals, policies and guidelines issued, amended or replaced from time to time by the IESO or its successor.

“Minimum ccASHP Efficiency Requirements” means the efficiency requirements for ccASHPs specified in 3.3.1.1 f).

“NRCan Guide” means the Air-Source Heat Pump Sizing and Selection Guide developed by NRCan, found [here](#), as may be updated from time to time.

“Participant” means, in respect of the Program Stream, a Person who (i) satisfies the eligibility requirements specified in Section 3, (ii) whose Pre-Installation Application has been approved by the Program Delivery Agent on behalf of the Program Administrators, and (iii) who has entered into a Participant Agreement.

“Participant Agreement” means in respect of the Program Stream, any one or more agreements or terms and conditions that an eligible Person entitled to receive a financial incentive must enter into with the Program Administrators or otherwise agree to be bound by, in order to participate in the Heat Pump Program Stream and receive such incentive.

“Participating HVAC Contractor List” means the list of eligible HVAC Contractors for the Program Stream, made available to the Participant by the Program Delivery Agent.

“Person” means any individual, sole proprietorship, partnership, firm, entity, unincorporated association, unincorporated syndicate, unincorporated organization, trust, body corporate or Governmental Authority, and where the context requires, any of the foregoing when they are acting as trustee, executor, administrator or other legal representative.

“Post-Installation Application” means the Application, including all required or requested supporting documentation, submitted by the HVAC Contractor after installing the Eligible Measure. This Application will be reviewed to verify the Eligible Measure was installed in accordance with the specifications in the Pre-Installation Application and confirm eligibility to receive an Eligible Measure Rebate.

“Pre-Installation Application” means the Application, including all required or requested supporting documentation, submitted by the HVAC Contractor prior to installing the Eligible Measure to verify eligibility to participate in the Program Stream.

“Program Delivery Agent” means one or more service providers under contract with the IESO and/or Enbridge to provide program delivery services for the Program, including the Program Stream.

“Program Stream Requirements” means the terms and conditions contained herein governing the Program Stream.

“Oil/Propane Tank Removal Attestation Form” means the attestation form Participants with oil or propane heated homes are required to sign as a condition of participating under the Program Stream.

“Work Order” means the quote, estimate, rental agreement, or other document that outlines the work to be undertaken by the HVAC Contractor in connection with the installation or implementation of the Eligible Measures, and includes details on the type of HP (i.e. including but not limited to brand name, AHRI number, and model number) that will be purchased and installed.