

MEMORANDUM



Date: July 1, 2022
To: Erine Rincon, SDG&E; John Zwick, SDG&E; Jennifer L. Taylor, SDG&E; Kenny Liljestrom, SDG&E
CC: Peter Lai, CPUC, Peter Biermayer, CPUC, Cameron Tuttle, DNV
From: Peter Biermayer P.E., Utilities Engineer,
EE Planning & Forecasting Section,
Energy Division, CPUC
Subject: CPUC Guidance on Unitary HVAC Equipment Data Collection Requirements and Eligibility Requirements.

Introduction

Energy Division (ED) recognizes that some of the existing requirements for measure packages (MPs) were inadvertently left in the MP that are no longer applicable due to other changes made in an updated measure package. Existing requirements in the MP that are no longer applicable include: the like-for-like for new construction and the +/- of 5% of existing capacity of equipment.

SDG&E submitted a Memorandum outlining requested changes to the measure package language. SDG&E requested written CPUC guidance allowing PY2023 data collection and eligibility requirements for PY2022. This guidance will be made available for the Ex-Post impact evaluation. It will allow adoption of the measure in PY2022 while still supporting SDG&E's quality assurance efforts. CPUC staff provides the guidance below.

Guidance on Requirements

- Like-for-like requirement is not applicable for new construction
- The +/- of 5% of existing capacity of equipment requirement is no longer required
- Fuel substitution is not allowed as part of these measure packages
- The language in the PY2023 measure packages for SWHC013 and SWHC014, for data and eligibility requirements will be modified per this memo.
- Adopt the PY2023 data collection and eligibility requirements for the PY2022 Statewide HVAC program.
- Data collection and eligibility requirements are summarized in Table 1.

Table 1 – Proposed HVAC Upstream data collection and eligibility requirements for 2022 and 2023.

Section	Requirements
<p>Data Collection Requirements</p>	<p>For upstream and midstream programs, data collection requirements are as follows:</p> <ul style="list-style-type: none"> • Site ID – A unique identifier for the shipped location (upstream) or installed location (midstream) of the incentivized equipment. <i>(For PY2022, the third-party implementer would provide Site Address as the unique identifier)</i> • Equipment ID - A unique identifier for each unit of incentivized equipment <i>(For this data field, the third-part implementer will collect the concatenated AHRI Number and Serial Number as the unique Equipment ID)</i> • Measure Size category – General size or capacity range specific to each measure type, for example HVAC equipment would be AHRI product type and size range • Equipment manufacturer – Manufacturer of the incentivized equipment, e.g., Carrier, Trane, Nest, Philips, GE, etc. • Equipment model number – Manufacturer number that can be used to lookup size, features, performance, etc. for the incentivized equipment • Rated capacity – Actual size, capacity, load rating, etc. for the incentivized equipment • Rated efficiency unit (EfficUnit) – The engineering unit basis for the efficiency or performance rating, e.g., EER (energy efficiency ratio) • Rated efficiency (ref. EfficUnit) – Efficiency or performance rating value for the Rated efficiency unit basis • Quantity per sales transaction, project, or site – Total units of incentivized equipment located at the site or project • Refrigerant used <i>(This data field would not be collected in PY2022)</i> • For NR measures, existing equipment type (i.e., AC or HP)
<p>Eligible Products and Program Exclusions –</p>	<p>ELIGIBLE PRODUCTS</p> <p>Eligible equipment must meet the measure case specifications in the Measure Case Description.</p> <p>All unitary direct expansion (DX) equipment is eligible. For the normal replacement measure application type, the replacement equipment must be “like for like” (e.g., a heat pump for a heat pump). Likewise, for the new construction measure application type, although there is no existing system being replaced, the baseline fuel type must be the same as the equipment being installed (i.e., no fuel substitution) for the purposes of savings claims.</p> <p>The model number is used to ascertain the equipment efficiency of a package system. The equipment efficiency of a split system will be based on a combination of the condenser and evaporator model numbers provided by a distributor. The efficiency rating will then be verified according to the Air-Conditioning, Heating,</p>

	<p>and Refrigeration Institute (AHRI) or Consortium for Energy Efficiency (CEE) database or manufacturers specification sheets.</p> <p>Field inspections should be performed to verify the condenser/unit model number for quality assurance purposes.</p> <p>Because of the large number of evaporator/condenser combinations available for split systems (several thousand combinations) some averages and/or minimum efficiencies may be used for certain groups of equipment.</p> <p>Program Exclusions</p> <p>Fuel substitution measures (regardless of measure application type) are not eligible for rebates using this measure package.</p>
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