



Trade Ally Handbook 2024

Table of Contents

03	Welcome
04	Program Overview
05	Residential Program
11	Measures Requiring Preapproval
12	FAQ
13	Projects
14	Highly Impacted Community Eligibility
15	Navigating the Trade Ally Connect Portal
19	Incentive Payment
21	Resources and Links
	Residential Outreach Contacts

Welcome

On behalf of Pacific Power, thank you for participating in the Wattsmart Trade Ally Program “the Program”! We are happy to have you as part of our team. By offering incentives directly to customers, you’ll help reduce electricity use in your community and improve customer satisfaction.

The Program is intended to help customers applying for energy efficient upgrade incentives. Here’s how it works:

It’s simple, we’re available every step of the way to make sure you have what you need to participate. To help promote Program offerings and Trade Allies, our Program team provides services for you, including:

- Expertise in answering technical questions about Program requirements and eligible products
- Support when navigating Trade Ally Connect Portal and using digital Program tools
- Annual Trade Ally training opportunities

This Trade Ally Handbook contains all the resources you and your team need to offer incentives on residential projects. This will also be available for download through the Trade Ally Connect Portal.

If you have additional questions, please reach out to the Program team.

Sincerely,

Your Wattsmart Home Energy Savings Team

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Please note, all Program staff at C+C, Resource Innovations, and Pacific Power work on numerous rebate programs in multiple states and will respond to all inquiries within 24 to 48 hours.



PROGRAM OVERVIEW



Residential Program

Residential offerings and incentives are available on HVAC equipment, heat pump water heaters, new construction, multifamily, weatherization, lighting, and other smaller measures. There are also enhanced incentives available for customers who live in **Highly Impacted Communities** (see next page for more information).

Visit Wattsmartsavings.net for additional Program information.

On the following pages, you'll find tables outlining Program incentives and links to each incentive application.

Heat Pump Incentives

Washington residential Pacific Power electric customers for projects purchased on or after January 1, 2024

Heat Pump Incentives

Your Trade Ally or store associate can help you find eligible products and services

	Heat Pump Upgrade to ≥ 10 HSPF (8.5 HSPF2) and ≥ 18.0 SEER (17.1 SEER2)	Federal Standard Heat Pump Conversion to ≥ 8.5 HSPF (7.23 HSPF2) and ≥ 14.0 SEER (13.3 SEER2)*	Efficient Heat Pump Conversion to ≥ 10 HSPF (8.5 HSPF2) and ≥ 18.0 SEER (17.1 SEER 2)*	Ductless Heat Pump ≥ 9.0 HSPF (8.1 HSPF2)	Heat Pump, New Manufactured Home
Single Family Customer Incentive	\$300	\$2,000	\$2,750	\$1,600	—
Single Family Trade Ally Incentive	\$125	\$500	\$750	\$400	—
Manufactured Home Customer Incentive	\$300	\$2,000	\$2,500	\$1,600	\$1,000
Manufactured Home Trade Ally Incentive	\$125	\$500	\$500	\$400	\$300
Multifamily** Customer Incentive	—	—	—	\$1,600	—
Multifamily** Trade Ally Incentive	—	—	—	\$400	—

* All heat pump conversion projects may be subject to a pre-approval and must receive approval before an application can be submitted. Projects without a pre-approval will be processed as a heat pump upgrade.

** All multifamily ductless heat pump projects must complete the pre-qualification process. Email PacificPower@WattsmartSavings.net for more information.

Enhanced Incentives for Customers Residing in Highly Impacted Communities***

	Federal Standard Heat Pump Conversion to ≥ 8.5 HSPF (7.23 HSPF2) and ≥ 14.0 SEER (13.3 SEER2)*	Efficient Heat Pump Conversion to ≥ 10 HSPF (8.5 HSPF2) and ≥ 18.0 SEER (17.1 SEER 2)*	Ductless Heat Pump ≥ 9.0 HSPF (8.1 HSPF2)
Single Family Customer Incentive	\$2,250	\$3,000	\$1,800
Single Family Trade Ally Incentive	\$500	\$750	\$400
Manufactured Home Customer Incentive	\$2,250	\$2,750	\$1,800
Manufactured Home Trade Ally Incentive	\$500	\$500	\$400
Multifamily** Customer Incentive	—	—	\$1,800
Multifamily** Trade Ally Incentive	—	—	\$400

* All heat pump conversion projects are subject to a pre-approval and must receive approval before an application can be submitted. Projects without a pre-approval will be processed as a heat pump upgrade.

** All multifamily ductless heat pump projects must complete the pre-qualification process. Email PacificPower@WattsmartSavings.net for more information.

*** Check customer eligibility for Enhanced Incentives here: verify.wattsmartbusiness.com/pacific-power-residential-customer-eligibility

Downloadable PDF heat pump [application here](#)

Central Air Conditioner (CAC) Incentives

Incentives	Central Air Conditioner
Customer Incentive	\$93
Trade Ally Incentive	\$62

Downloadable PDF air conditioner [application here](#)

Heat Pump Water Heater Incentives

Incentives	Tier 3 and above
Customer Incentive*	\$900
Trade Ally Incentive	\$300

*Customers may be eligible for \$900 incentive if they self-install their heat pump water heater. There is no Trade Ally Incentive for self-install scenarios.

Downloadable PDF heat pump water heater [application here](#)

Duct Sealing & Duct Insulation Incentives

Incentives	Duct Sealing	Duct Sealing + Duct Insulation	
	Customer Incentives Only	Customer Incentive	Trade Ally Incentive
Single Family	\$500	\$750	\$250
Manufactured Home	\$500	No incentive available	No incentive available

Downloadable PDF duct sealing/insulation [application here](#)

Smart Thermostat Incentives

Washington residential Pacific Power electric customers for projects purchased on or after January 1, 2023

Smart Thermostat Incentives	
Your Trade Ally or store associate can help you find eligible products and services	
Customer Incentive	\$100

Instructions

Steps and requirements to earn each incentive

Ensure the home qualifies

- Must be an existing single family, manufactured, or multifamily home; new construction is not eligible for this incentive
- Home's primary heat source must be either a ducted heat pump or an electric forced air furnace
- Home is not qualified if a Wattsmart incentive was received for a new heat pump install or upgrade within the past 5 years

Purchase a new qualifying product

- Smart thermostat must be a programmable climate control device that allows customizable schedule of home temperature
- Product must be on ENERGY STAR® certified Products List at time of purchase available at wattsmartsavings.net/washington-residential/find-savings-heating-and-cooling/smart-thermostat/
- Only one smart thermostat incentive per home

Downloadable PDF smart thermostat [application here](#)

Window Incentives

Window Replacement Incentives			
Home Type	Precondition	Efficiency Requirement	Incentive
All home types	Any precondition	U-Factor of no more than 0.25	\$1/sq-ft of windows installed
Single family or manufactured home	Replacing single pane wood/metal window	U-Factor of no more than 0.30	\$5/sq-ft of windows installed
		U-Factor of no more than 0.22	\$10/sq-ft of windows installed
	Replacing double pane metal windows	U-Factor of no more than 0.30	\$3/sq-ft of windows installed
		U-Factor of no more than 0.22	\$6/sq-ft of windows installed
Multifamily	Replacing single pane wood/metal window	U-Factor of no more than 0.22	\$25/sq-ft of windows installed
	Replacing double pane metal windows	U-Factor of no more than 0.22	\$15/sq-ft of windows installed

Notes for Window Replacement Incentives

- Pictures of precondition windows are required to receive higher precondition based incentives.

Low-E Storm Window Incentives

Single family home	Any Precondition	Emissivity ≤ 0.22 Solar transmittance > 0.55	\$3/sq-ft of window installed
Manufactured or Multifamily home	Any Precondition	Emissivity ≤ 0.22 Solar transmittance > 0.55	\$6/sq-ft of window installed

Notes for Low-E storm windows

- Storm windows must be of the same opening type as the existing prime window.
- Storm windows shall be permanently installed.
- Exterior storm windows shall be oriented with the low-e coating facing toward the interior of the house.
- For installations with metal framed prime windows the storm window's frame shall not be in direct contact with the prime window frame.

Downloadable PDF window [application here](#)

Insulation Incentives

Incentive paid by square footage of installed product

Single Family Homes				
Insulation Type	Home's Primary Systems	R-Initial	R-Final	Incentive
Attic	Electrically Cooled	≤ 19	≥ 49	\$0.07/sq. ft.
Attic	Electrically Heated	≤ 19	≥ 49	\$0.46/sq. ft.
Floor	Electrically Heated	0	≥ 19	\$0.31/sq. ft.
Floor	Electrically Heated	0	≥ 30	\$0.46/sq. ft.
Wall	Electrically Heated	0	≥ 13 or fill cavity	\$0.62/sq. ft.

Manufactured Homes				
Insulation Type	Home's Primary Systems	R-Initial	R-Final	Incentive
Attic	Electrically Heated	0	≥ 22	\$0.77/sq. ft.
Attic	Electrically Heated	≤ 11	≥ 30	\$0.94/sq. ft.
Floor	Electrically Heated	0	≥ 22	\$0.46/sq. ft.

Multifamily Homes				
Contact the Program for details on how to apply: HesMultifamily@PacificPower.net				
Insulation Type	Home's Primary Systems	R-Initial	R-Final	Incentive
Attic	Electrically Heated	≤ 19	≥ 49	\$0.46/sq. ft.
Floor	Electrically Heated	0	≥ 19	\$0.31/sq. ft.
Floor	Electrically Heated	0	≥ 30	\$0.46/sq. ft.
Wall	Electrically Heated	0	≥ 11 or fill cavity	\$0.62/sq. ft.

Downloadable PDF insulation [application here](#)

Single-Family New Homes Incentives

The certificate of occupancy issuance date is used to determine the measure effective date in the Single-Family New Homes Program and Multifamily New Homes Program. The Program requires that all documents are submitted within 90 days of certificate of occupancy issuance date. Homes completed with certificates of occupancy dated less than 120 days prior to the new Program version effective date may be eligible for incentives under the new Program structure.

Single Family New Homes Incentives*		
Program Pathway	Requirements	Incentives
Performance Path	Whole home Tier 1 (10% -19.99% above code) Electric space AND water heating	\$1,875
	Whole home Tier 2 (\geq 20% above code) Electric space AND water heating	\$3,125
	Whole home Tier 1 (10% above code) Electric cooling AND electric water heating	\$625
Pay for Savings Path	Whole home any % above code Electric space AND water heating	\$0.50/kWh annual energy savings
Standalone Path	Heat Pump \geq 12.0 HSPF and \geq 18.0 SEER	\$250

*Homes may only qualify for Single Family New Homes incentives through one of three pathways listed above: Performance, Pay for Savings, or Standalone

Instructions

Steps and requirements to earn each incentive

Ensure the home qualifies

- Home must be new single-family construction. Up to 3 connected units can qualify as single family. Buildings with 4 or more units may be eligible for Multifamily New Construction incentives. New home is defined by the Program as a newly constructed single-family residence or a complete remodel of an existing structure into a new living space.
- Home must have electric water heating as well as electric space heating and/or cooling to qualify for the Performance incentives. Home must have electric space heating and electric water heating to qualify for the Pay for Savings incentive.
- For the electric space heating incentives, home's primary space heating must be electric baseboard, electric ceiling or wall heat, electric furnace, ductless heat pump, or electric ducted heat pump (space heaters do not qualify).
- For the electric cooling incentive, home must have a compressor based cooling system serving the whole home (portable air conditioners and evaporative coolers do not apply) and be heated by gas or other fuel.
- Homes completed with certificated of occupancy dated less than 120 days prior to the new Program version effective date may be eligible for incentives under the new Program structure.
- Work completed must comply with all building codes and standards.

Downloadable PDF new homes [application here](#)

Measures Requiring Preapproval

In order to be approved for incentives, HVAC conversion and window projects within the Program require preapproval in order to move through processing. This ensures the preexisting equipment meets the measure's minimum specifications.

This step should be completed prior to project installation.

To request preapproval, you can choose one of two paths:

1. Begin the incentive application online using the Trade Ally Connect Online Incentive Center (see step 7 under "Navigating Trade Ally Connect"). Using the online application, you'll need to submit all supporting documentation available, along with photo proof of the preexisting equipment. The processing team will then reach out to the customer to verify some information. Please encourage your customer to answer 1-800 phone calls, as this step is crucial for processing to move forward. If the customer is not able to answer, they can call **1-800-890-8442** to complete the preapproval process.

Then, you will receive an email stating the preapproval process is complete and work can begin. Once installation is complete, email your final invoice (including purchase and completion dates) to PacificPower@WattsmartSavings.net, and be sure to reference the original application number.

OR

2. You can email the following information and materials to PacificPower@WattsmartSavings.net with the subject line "WA Preapproval Request":
 - Customer First and Last Name
 - Customer Phone Number
 - Site Address
 - Utility Account Number
 - Which incentive measure you're seeking
 - AHRI Certificate (if applicable)
 - Photos of previous heat source/windows
 - Completed measure application

FAQ

What are the Program participation requirements?

To apply to become a Program Trade Ally, contractors must complete a Participation Agreement package and review the [Wattsmart Vendor Network Requirements](#). Click here for the [Participation Agreement package](#).

After a Trade Ally is approved, they must attend training, either virtually or in-person, to learn about Program details, eligibility, and how to use the Trade Ally Connect Portal for submission and incentive payment. Training will be scheduled with the Trade Ally Manager or Field Representative upon approval.

Do all my customers qualify for this Program?

Qualifying customers must be current Pacific Power customers on Rate Schedule 16, 17, 18 or 19 in Washington, and the product must be installed in a home with a residential electric account. Customers are only eligible to receive one incentive per qualifying measure. If a customer or Trade Ally previously received a rebate on a measure, they may not receive additional rebates.

How do I verify that someone is a qualified customer?

Customer eligibility can be verified online using the [Customer Search function](#) in the OnSite Tool Assessment within the Trade Ally Connect Portal.

If a customer does not appear in this search, they are not eligible for the Program. If you believe a customer should be included in the Program, please contact your Field Representative to verify eligibility.

How do I check if a customer is eligible for the increased Highly Impacted Communities measures?

There is a link listed on each incentive application, or you can find eligibility information [online](#). There is also an eligibility checker included on the Trade Ally Connect Portal. Log in and navigate to the "Helpful Resources" tab; scroll to bottom, and click on [Home Energy Savings Eligibility](#) under "Highly Impacted Communities". Enter the customer's meter number. If both "Standard Incentives" and "Named Community Incentives" are highlighted green, then your customer is eligible for the increased measures offered.

Can I use the Pacific Power logo in our marketing or on our website?

At this time, Pacific Power does not permit any co-branded or Pacific Power/Wattsmart logo usage on Trade Ally websites. However, we are currently working on a marketing tool feature within the Trade Ally Connect Portal where Trade Allies will be able to order co-branded mailers, banners, clothing, etc. We will update all Trade Allies when this feature becomes available.

Do Trade Allies 'work for' Pacific Power or 'work with' Pacific Power?

Trade Allies within the Home Energy Savings Program are trusted partners who are approved to complete work for Pacific Power customers. As such, they 'work with' Pacific Power to provide energy efficiency rebates.

How long can Trade Allies participate in the Program?

Per the Trade Ally Participation Agreement, Program participants may continue to participate in the Program if they meet stipulated project completion goals and Program eligibility requirements. During the first year of the Program (2023), a Trade Ally must have completed at least one project to remain active in the Program. Project completion goals will be reassessed by Program staff in 2024 based on participation levels.



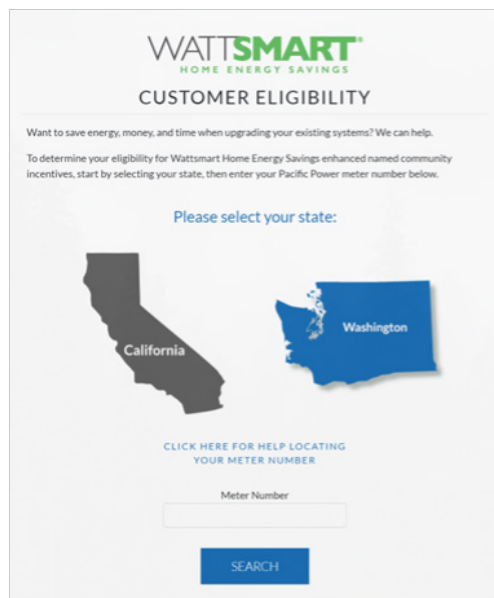
PROJECTS

Highly Impacted Community Eligibility

Pacific Power offers increased incentives on certain measures to those residing in Highly Impacted Communities. We encourage you to use this tool to help determine the incentive amounts you can offer your customers based on their location.

To check customer eligibility, follow the steps below. The eligibility checker can be found on the Trade Ally Connect Portal: Click Helpful Resources, and then [Home Energy Savings Eligibility](#).

1. Click on your applicable state > Enter the customer meter number > Click "Search"



WATTSMARTSM
HOME ENERGY SAVINGS

CUSTOMER ELIGIBILITY

Want to save energy, money, and time when upgrading your existing systems? We can help.
To determine your eligibility for Wattsmart Home Energy Savings enhanced named community incentives, start by selecting your state, then enter your Pacific Power meter number below.

Please select your state:

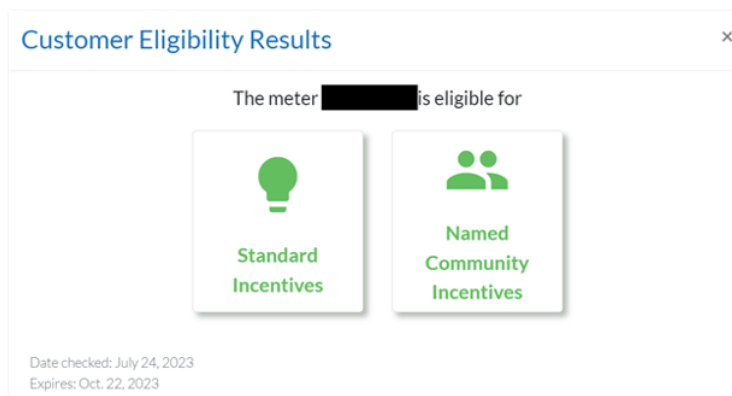
California Washington

CLICK HERE FOR HELP LOCATING YOUR METER NUMBER

Meter Number

SEARCH

2. If your customer is eligible for the enhanced Highly Impacted Community incentives, both of the following boxes will appear highlighted in green. The "Named Community Incentives" indicates eligibility. If the customer is ineligible, only the "Standard Incentives" box will be highlighted.



Customer Eligibility Results

The meter [REDACTED] is eligible for

Standard Incentives

Named Community Incentives

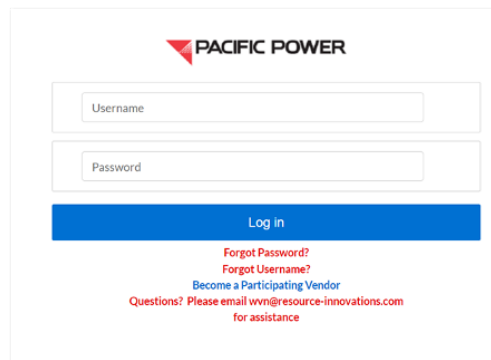
Date checked: July 24, 2023
Expires: Oct. 22, 2023

Navigating the Trade Ally Connect Portal

Screenshots and a step-by-step guide are included below. All new Trade Allies will be contacted by the Trade Ally Manager upon membership approval to schedule onboarding, either in-person or over a Zoom call. This training will include how to navigate the Trade Ally Connect Portal and an overview of Program details, along with providing an opportunity to ask questions. This service is also available to existing Trade Allies that may need a refresh.

Signing in

Using your existing [Trade Ally login information](#), sign into the Trade Ally Connect Portal.

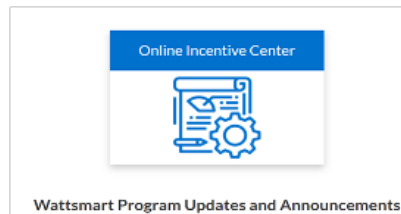


If you are unable to login, please contact Trade Ally Manager Crystal Bunting (Cbunting@cplusc.com, 509-901-9185) or Market Engagement Lead Alejandra Tapia (Atapia@resource-innovations.com, 509-824-1706).

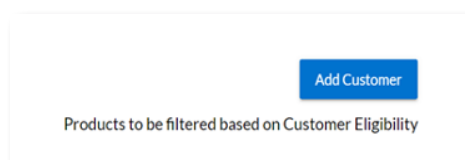
How to submit an online incentive application

Paper applications and supporting project documents may be obtained from Wattsmartsavings.net and emailed to PacificPower@WattsmartSavings.net, although Trade Allies are strongly encouraged to submit online applications through the Trade Ally Connect Portal. Below is the step-by-step guide to apply online.

1. Click the blue “Online Incentive Center” button on the landing page to access the Online Incentive Center Application.



2. Select “Add Customer” first. Please note, this step is critical for rest of application.

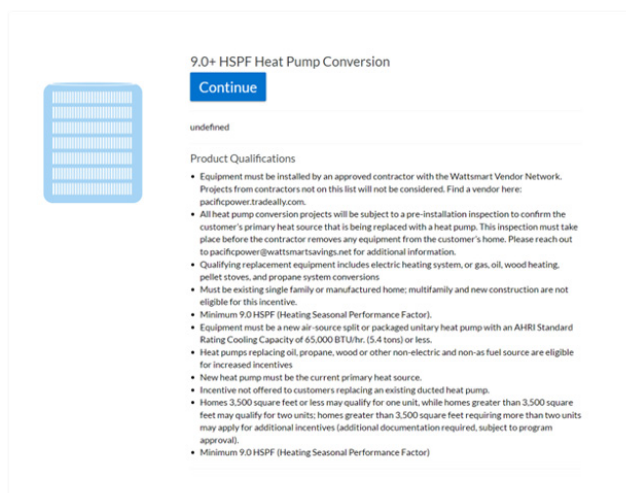


3. Scroll to the bottom of the form and enter customer utility account number in; please refer to example format below, and remove the last single digit and include the dash. Enter zip code. Select “Search” and customer’s address will auto-populate. Then click “Continue.”

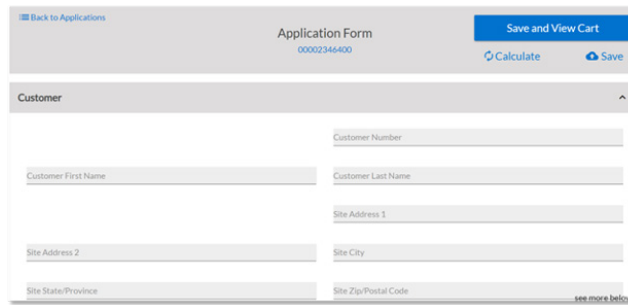
4. Select “Product Type” in left hand column. Then click on appropriate measure you’re applying for.



5. Read through qualifications for that measure and click “Continue.”



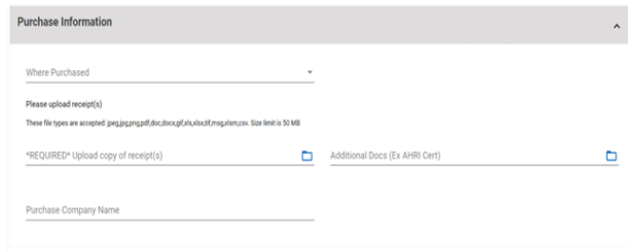
6. In your application, the customer's name and address will auto-populate based on step 3.



7. Scroll down and enter the customer's name. You'll want **to enter your company email address if you (as the contractor) want all rebate correspondence sent to you** (including missing information requests, QA's, etc.). Enter the customer's best contact phone number in case Pacific Power needs to conduct a preapproval. Continue to answer all remaining questions in this section of the application.



8. In the "Purchase Information" section, select "Contractor Supplied." Upload your company invoice on the left side and AHRI Certificate on the right side. For conversion measures and window projects, upload your photos of preexisting equipment (previous heat source or previous windows) on the right side as well. Under Purchase Company information, enter your name and business address.



9. Please note: If you have a third party addendum to attach, please answer yes to both of the following drop-down questions and upload the third party document here. See next page for more information on third party payment addendums.



10. If at any point you'd like to save and come back to complete the application later, click "Save." If you're ready to submit the application, click "Save & View Cart." Then agree to Terms and Conditions and click "Submit." This will send your application to the processing department.

To check the status of an application, click on your name in the top right corner, and then click "Applications." Here you will see a list of all projects your company has submitted through the Program as well as the status of each application. If there is missing information from your application, the processing department will reach out to you via email. Your outreach team is also available to assist you.

More information on third party payment addendums:

This document is used for assigning the customer incentive payment to a third party. There are four options, as seen below. The two most used options are 1 and 4.

Option 1 example: A landlord is paying for an upgrade, but the utility meter is in the tenant's name. The landlord would need to fill out option 1 and sign addendum to receive the incentive payment.

Option 4 example: When a customer is using Craft3 financing, you must offer an instant rebate on your invoice. Your company representative would then fill out option 4 and sign, to assign the customer incentive back to your company.

<p>Option 1: For property owners, landlords and homeowners not listed on account</p> <p>Instructions</p> <p>Property owner or landlord must complete the information below and provide a copy of the current property tax record clearly showing the following:</p> <ul style="list-style-type: none">• Date of report• Property's physical address (must match installation address below and on incentive application)• Full name of property owner/landlord (Individual or business; must match name printed below) <p>If the property tax records show the owner of the property to be a business, a completed and signed W-9 (www.irs.gov/pub/irspdf/fw9.pdf) must also be submitted.</p>
<p>Option 2: For property management companies</p> <p>Instructions</p> <p>Property management companies can verify or update their existing landlord accounts or create new landlord accounts by calling Pacific Power customer service at 1-888-221-7070.</p> <p>If there are individual tenant units not on an existing landlord account, you as a property management company can still direct payment to you by completing the information below and providing a letter from the current Pacific Power account holder authorizing incentive payment to the property management company and a completed and signed W-9 (www.irs.gov/pub/irspdf/fw9.pdf) must also be submitted.</p>
<p>Option 3: For homeowner associations</p> <p>Instructions</p> <p>Homeowner association representative must complete the information below and provide a copy of the official registration of the Homeowners Association with the state and a completed and signed W-9 (www.irs.gov/pub/irspdf/fw9.pdf).</p>
<p>Option 4: For assigning payments to contractor</p> <p>Instructions</p> <p>Account holders have the option of completing the Third Party Payment Addendum for assigning payments to a contractor by completing the information below. The account holder and the contractor must both authorize incentive payment and the contractor must submit a completed and signed W-9, unless already submitted during trade ally enrollment (www.irs.gov/pub/irspdf/fw9.pdf).</p>

Option 4 note: If you do not have a copy of the Third Part Payment Addendum, please reach out to your Trade Ally Manager to receive a copy:

Crystal Bunting

Trade Ally Manager & HVAC/HPWH

cbunting@cplusc.com




INCENTIVE PAYMENT

Incentive Payment

You can check the status of your project applications by logging into your Trade Ally Connect Portal. Open the “Online Incentive Center.” Click on your username in the top right corner, and then click “Applications.” This will generate a historical list of all applications submitted through your company. You can then click on the application number link to view any notes the processing department may have left regarding the application.

After you save and submit an application, it will move through different stages of processing, from “Submitted” to F1-F4. Once approved, the status will change to “Completed-Request Payment,” at which time you will know your project will be paid out on the next batch of invoices. Approved projects are paid once a week and generally take 7 to 14 business days to reach you and your customer by mail.

Customer	Site	
Program name Washington Home Energy Savings Program	Application Number 00002757709	Created Dec 5, 2023, 10:11:37 AM PST
	Status In Progress - Preliminary/Proposed	Last Updated Jan 15, 2024, 11:57:01 AM PST
	Product Heat Pump to 10.0 HSPF Heat Pump Upgrade	

You will receive periodic emails throughout processing to inform you of the status of your application, including if there is missing information or if preapproval is needed. If you do not receive these emails, please reach out to your Outreach Coordinator or Trade Ally Manager for assistance using [this online form](#).

Resources and Links

Trade Ally Connect [Portal login](#)

New Trade Ally [Registration Landing Page](#)

Highly Impacted Communities Verification:

1. [Input meter number](#)
2. Or the [Washington DOH tool](#)

[Wattsmart Business Site](#)

Pre-approval Phone#: [800-890-8442](tel:800-890-8442)

Email addresses for preapproval or to submit paper applications:

PacificPower@WattsmartSavings.net

MultiFamily@WattsmartSavings.net

Residential Outreach Contacts

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