Efficiency Works™

Estes Park | Fort Collins | Longmont | Loveland

Efficiency Works Homes Appendix E + F Training

November 17, 2026



Agenda

- Welcome introduction
- Efficiency Works retrofit rebate offerings
- 2027 program updates
- Review appendices E, E2 and F
- Additional resources
- Questions

The Efficiency Works Homes team



Ryan Gibson

Platte River program supervisor

Role:

Oversees all Homes programs and leads the Income-qualified program



Jack Lapsley

Platte River program manager

Role:

Leads advising and assessments, the retrofit rebates program and service provider management



Claudia Farfan-Loroño

Platte River program manager

Role:

Leads appliance recycling and residential Flex programs



Trenton Boen

Platte River program specialist

Role:

Supports the retrofit rebate program, service provider management and rebate processing

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Residential retrofit rebates

Categories:

- Envelope
  - Insulation and air sealing
  - Windows and doors
- Heating and cooling
  - Heat pumps
  - Ventilation
  - Smart thermostats
- Water heating
  - Heat pump water heaters
- Electrification
  - Panel upgrade
  - Load sharing device

Eligibility:

Residential meter served by an eligible electric utility.



Heating, ventilation and air conditioning (HVAC)

- Pre-approval required for projects $2,500+
- 45-day application submittal from the date of install or signed terms and conditions
- Required documents:
  - Customer signed terms & conditions (T&Cs)
  - Invoice with an Efficiency Works' rebate
- Additional documents may include:
  - AHRI certification
  - Manual J
  - Cold climate certification
  - Appendix F (customer must sign if failed)
  - Appendix E/E2



Insulation and air sealing

- Pre-approval required for projects $2,500+
- Assessment required prior to work being completed and application submittal
    - Blower door test required
- 45-day application submittal from the date of install or signed terms and conditions
- Required documents:
    - Customer signed T&C’s
    - Invoice with an Efficiency Works’ rebate
    - Appendix F
    - Appendix P photo documentation



Windows and doors

- Pre-approval required for projects $2,500+
- 45-day application submittal from the date of install or signed terms and conditions
- Required documents:
  - Customer signed T&C’s
  - Invoice with an Efficiency Works’ rebate
  - Appendix P photo documentation



Flex Thermostat incentives

Earn incentives by allowing temporary temperature adjustments during periods of high electricity demand

Adjustments are designed to have minimal impact on comfort

- $50 new enrollment incentive
- $25 annual participation incentive
- Once enrolled, no action is required; just keep your thermostat connected to the internet
- Easily opt out of temperature adjustments at any time

Eligibility

Must have an eligible internet-connected device that controls electric HVAC equipment; residential meter served by an eligible electric utility*



*Fort Collins Utilities customers are only eligible to participate using Google Nest (Renew Home) thermostats.

Flex EV incentives

- **Flex EV (coming soon!)**
  - a voluntary program that rewards eligible EV and Level 2 charger owners for helping support a more reliable electric grid.
- Eligible participants may receive:
  - $50 enrollment incentive after approval
  - $60 annual participation incentive
- Easy, voluntary enrollment with eligible, residential-style Level 2 chargers or EVs
- Available in Estes Park, Longmont, and Loveland



Efficiency Works 2027 program updates

Measure updates

ccASHP – backup ($2,000)

- Minimum 15.2 SEER2 & 8.1 HSPF2
- Must be AHRI matched (indoor and outdoor coil)
- Sized for 100% of the design heating load at 5 degrees
- Cold climate heat pump – certified by one of the following: NEEP, CEE, AHRI, or ENERGY STAR
- **Electric or gas back up**

ccASHP – no backup ($3,000)

- Minimum 15.2 SEER2 & 8.1 HSPF2
- Must be AHRI matched (indoor and outdoor coil)
- Sized for 100% of the design heating load at 5 degrees
- Cold climate heat pump – certified by one of the following: NEEP, CEE, AHRI, or ENERGY STAR
- **No backup heating source**

Efficiency Works 2027 program updates

Measure updates

Air sealing and insulation

- Rebates increased by 50% for all measures

Windows

- Customers can now submit applications for window upgrades in the retail products program
- Pre/post picture requirement for install no longer required
- No Appendix F2 required

Smart thermostats

- Rebate is $35 in both Retrofit Rebate and Retail Products programs

Efficiency Works 2027 program updates

Bonus updates

Rental bonus

- Only available in Fort Collins
- 2x the standard rebate for long-term rentals with an active lease
- Preapproval required
- Mandatory self-attestation

Bundling bonus

- No longer available

Efficiency Works 2027 program updates

Additional program updates

Rebate aggregator pathway

- Rebate aggregators will be allowed to submit applications on behalf of service providers
- Rebate aggregator pays out a rebate up-front to the contractor, and the aggregator receives a rebate from Efficiency Works

Heat pump standards

- Removed air handler blower AHRI match requirement
  - Prevents having to replace a new furnace unnecessarily

Service provider premium status

- Contingent on the following:
  - Less than three failed PIVs
  - Less than 25% of applications go through “Missing Information” cycle

Completed Efficiency Works projects

- Removed from the website

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Appendix E

Ducted or partially ducted

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Appendix E: commissioning form (air source heat pump, ducted or partially ducted)

Customer name:	**Date:**
Address:	
Installing company:	

Equipment specifications	
Manufacturer	
Air handler model #	
Outdoor unit model #	
Indoor coil model #	
Nominal capacity (tons)	

System air flow	
Total air flow CFM	
Supply ESP (IWC)	
Return ESP (IWC)	
Total ext. static pressure (IWC)	
*Total ESP is 0.80 IWC or lower	☐ Pass ☐ Fail
*CFM per ton is 350-500:	☐ Pass ☐ Fail
*Equipment that does not pass total ESP and CFM per ton criteria is not eligible for a rebate.	

Installation	
Properly leak tested and dehydrated to the manufacturer's guidelines	☐ Pass ☐ Fail
Insulation covers the full length of line sets (no exposed copper)	☐ Pass ☐ Fail
Floor/wall/ceiling penetrations sealed	☐ Pass ☐ Fail
Condensate line installed without dips or traps	☐ Pass ☐ Fail
Installed to code and manufacturers' required minimum space and elevation off of grade (whichever is greater)	☐ Pass ☐ Fail

Comissioning	
Please choose between the Weigh-in or Subcooling method. If no target subcooling is available, use Weigh-in method.	
Weigh-in method	
Manufacturer specified length (feet)	
Minimum	
Maximum	
Maximum, with factory charge	
Actual line set length	

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Comissioning		
Weigh-in method		
Refrigerant added, if required by manufacturer		
Pounds		☐ N/A
Ounces		☐ N/A
Subcooling method		
Target subcooling (°F)		
Actual subcooling (°F)		
Actual subcooling is +/- 3 °F of target, 2°F minimum		☐ Pass ☐ Fail

Indoor measurements	
Return air DB (°F)	
Supply air DB (°F)	
Blower motor electrical power (Volts)	
Blower motor electrical power (Amps)	

Outdoor measurements	
Compressor electrical power (Volts)	
Compressor electrical power (Amps)	

Technician's name	
Technician's signature	

Notes:

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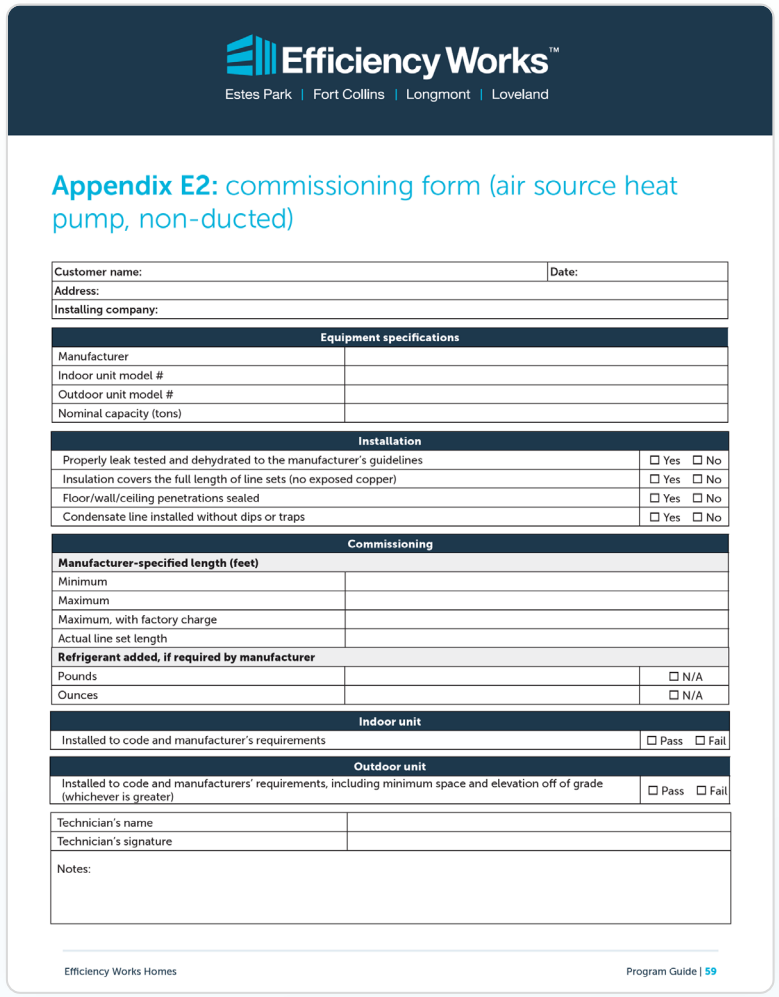
Appendix E2

Non-ducted



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Appendix E2: commissioning form (air source heat pump, non-ducted)

Customer name:	**Date:**
Address:	
Installing company:	

Equipment specifications	
Manufacturer	
Indoor unit model #	
Outdoor unit model #	
Nominal capacity (tons)	

Installation	
Properly leak tested and dehydrated to the manufacturer's guidelines	☐ Yes ☐ No
Insulation covers the full length of line sets (no exposed copper)	☐ Yes ☐ No
Floor/wall/ceiling penetrations sealed	☐ Yes ☐ No
Condensate line installed without dips or traps	☐ Yes ☐ No

Commissioning		
Manufacturer-specified length (feet)		
Minimum		
Maximum		
Maximum, with factory charge		
Actual line set length		
Refrigerant added, if required by manufacturer		
Pounds		☐ N/A
Ounces		☐ N/A

Indoor unit	
Installed to code and manufacturer's requirements	☐ Pass ☐ Fail

Outdoor unit	
Installed to code and manufacturers' requirements, including minimum space and elevation off of grade (whichever is greater)	☐ Pass ☐ Fail

Technician's name	
Technician's signature	
Notes:	

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Appendix F

Combustion Appliance Zone (CAZ) testing

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Appendix F: Combustion Appliance Zone (CAZ) testing

Site address: _____

Step 1: reason for CAZ test

Identify existing equipment:

- ☐ Tanked gas water heater
- ☐ Gas furnace

Select reason CAZ testing not required:

- ☐ Sealed combustion gas hot water heater
- ☐ Existing 80% furnace that is independently vented
- ☐ Sealed combustion furnace

If CAZ testing is required, proceed through steps 2-4. If CAZ testing is not required, proceed to Step 4.

Step 2: in-field testing

Test the functioning of the exhaust system of your gas furnace and/or water heater to the standards of the Building Performance Institute. This includes a spillage (a.k.a. "back-drafting") test performed under two test conditions: natural conditions and worst-case conditions, as well as undiluted and ambient carbon monoxide (CO) measurements. If CAZ testing passes under worst-case conditions, proceed to step 4.

Note: Natural conditions testing is only required if spillage fails under worst-case conditions. If it also fails under natural conditions, the appliance must be fixed before it qualifies for a rebate.

- Carbon Monoxide at steady state (ppm) design limits: water heater 200 ppm, furnace 400 ppm.

Appliance 1:

☐ Water heater ☐ Furnace

Natural draft gas appliance flue gas spillage at worst-case conditions:	☐ Pass	☐ Fail (customer must sign)
Natural draft gas appliance flue gas spillage at natural conditions:	☐ Pass	☐ Fail (customer must sign)
Carbon Monoxide at steady state (ppm): _____	☐ Pass	☐ Fail (customer must sign)

Notes: _____

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Appliance 2:

☐ Water heater ☐ Furnace

Natural draft gas appliance flue gas spillage at worst-case conditions:	☐ Pass	☐ Fail (customer must sign)
Natural draft gas appliance flue gas spillage at natural conditions:	☐ Pass	☐ Fail (customer must sign)
Carbon Monoxide at steady state (ppm): _____	☐ Pass	☐ Fail (customer must sign)

Notes: _____

Step 3: customer acknowledgment

☐ Under **worst-case conditions** a potential carbon monoxide hazard has been identified in the home. Worst-case conditions occur when all exhaust systems (bathroom fans, stovetop fans, dryers, furnace, etc.) are all running at the same time. This simulates a depressurization condition where exhaust from gas-burning appliances could enter the living space. I understand there is a potential carbon monoxide hazard in my home.

☐ Under **natural conditions** a carbon monoxide hazard has been identified in the home. Natural conditions occur when all the systems in the home are operating in a manner most similar to the typical state of the home. Failure under natural conditions means that exhaust from gas-burning appliances is likely to enter the living space regularly. Immediate actions should be taken to correct the spillage from the natural draft gas vent. I understand there is a potential carbon monoxide hazard in my home.

Customer name _____ Customer signature _____ Date _____

Step 4: contractor acknowledgment

☐ As the participating contractor in Efficiency Works, I acknowledge that, if required, I have tested the functioning of the exhaust system of the gas furnace and/or water heater to the standards of the Building Performance Institute, as called out by Efficiency Works. I also acknowledge that I have discussed the test results and any health/safety issues with the homeowner directly.

CAZ tester name _____ CAZ tester signature _____ Date _____

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Additional resources

Mentor improvement verification (MIV)

Details

- Service offered to listed service providers who request further guidance on installation standards, commissioning requirements or rebate application processes.
- Efficiency Works staff or service providers may request an MIV.
- MIV’s for installation standards and commissioning requirements will occur in the field, and rebate application processes will occur virtually.
- Typically used by new service providers or service providers with new staff.
- It is mandatory for all new service providers to complete a rebate application MIV within the first five submitted rebate applications.
- Full details listed in Appendix G of Homes Service Provider Guide

Rebate application MIV’s meet the one training per year requirement!

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Service Provider Development Grant

Overview

We want you with us on our journey

- Support to continue your team's growth and skill development within efficiency.
  - Up to $2,000 available per service provider per calendar year
  - Preapproval is required
  - Find an efficiency training or eligible equipment and Efficiency Works Homes will help pay for it
  - Eligibility details can be found in the Homes Program Guide

Listed service provider	
Annual training maximum	$2,000
Amount reimbursed for custom training	50%
Minimum reimbursement	$75

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Digital resources

Selling Energy

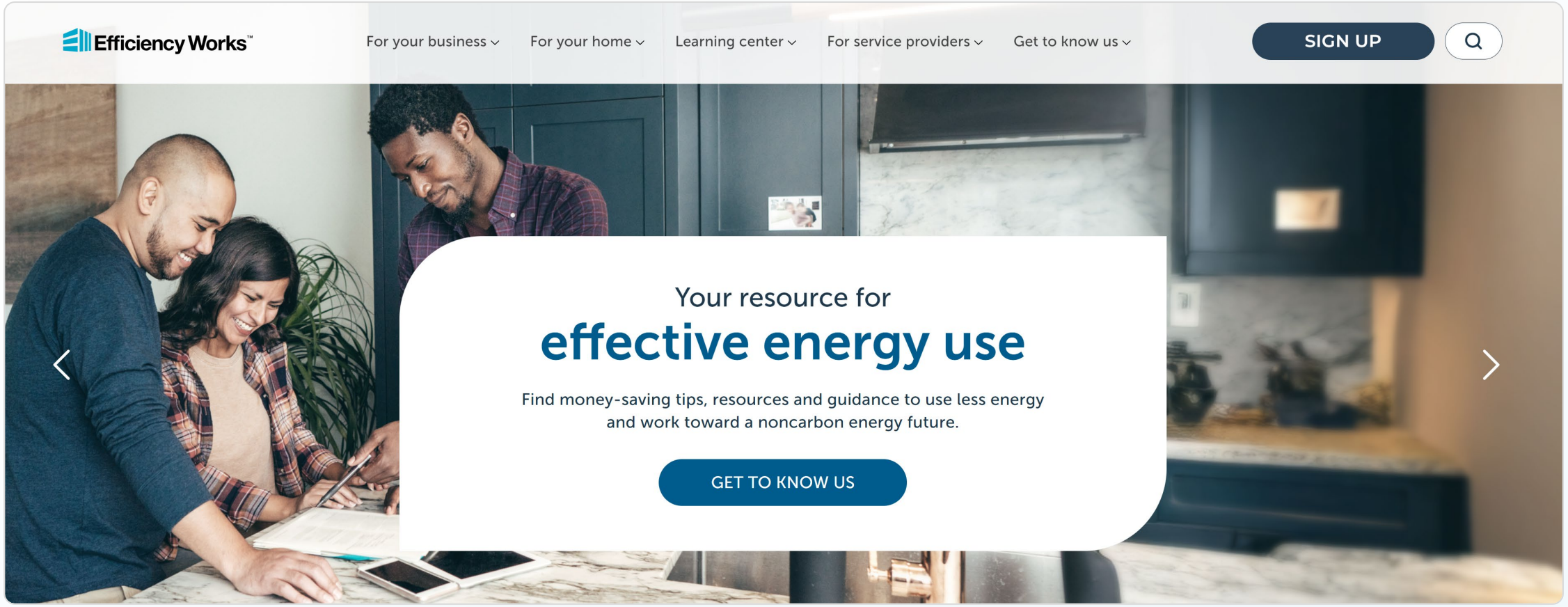
As a listed Efficiency Works Homes service provider, you have access to a year-long license to on-demand sales training, coaching calls, webinars and more through the Selling Energy training portal.

Marketing assistance

As a listed Efficiency Works Homes service provider, you have access to co-brand marketing materials with Efficiency Works. Reach out to us so we can connect you with our communications team.

Trainings and events

Found on Efficiency Works' website



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Additional program questions?

Contact us

Homes@EfficiencyWorks.org

(970) 229-5650