



## **Filing Receipt**

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**TO:** Public Utility Commission of Texas and Texas Electric Utilities

**FROM:** Lark Lee and Tina Yoder, Tetra Tech

**SUBJECT:** Docket 56768, Revised Texas Technical Reference Manual Version 12.0 Program Year 2025

**DATE:** October 14, 2024

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Revisions made to the Residential Volume 2 filed on October 8, 2024 are shown below as redlines in this memo while redlines with comments have been added to Volume 2 Residential. These revisions will be further described during the Fall EEIP meeting on October 15, 2024.

Maintenance of the statewide Texas Technical Reference Manual (TRM) is one of the primary objectives of the Public Utility Commission of Texas' (PUCT or Commission) evaluation, measurement, and verification (EM&V) for the electric utilities' (utilities) energy efficiency programs. This memo summarizes the updates for Texas Technical Reference Manual Version 12.0 for the program year 2025 (PY2025) (PY2025 TRM 12.0).

This memo will be updated to include comments related to the TRM redlines from the stakeholder input process through the Energy Efficiency Implementation Project (EEIP) at the end of the stakeholder comment period on October 29, 2024.

### TRM Overview

Commission staff, the EM&V team, the utilities, and the utilities' contractors work collaboratively to prioritize and implement updates (referred collectively as "the TRM Working Group"). Public input for new measures or updates is solicited in the Spring of each program year. Following the TRM Working Group's updates, public input is once again solicited in the Fall after review at the Fall EEIP.

The TRM has five volumes:

- **Volume 1: TRM Overview and User Guide** covers the process for TRM updates, version roll-outs, weather zones, TRM structure, and the format of the TRM measure overviews.
- **Volume 2: Residential Measures** contains the measure descriptions and deemed savings estimates for measures installed in residential dwellings.
- **Volume 3: Nonresidential Measures** contains the measure descriptions and deemed savings estimates for measures installed in nonresidential facilities.
- **Volume 4: M&V Protocols** has standardized measurement and verification (M&V) protocols for technologies and new program types.
- **Volume 5: Implementation Guidance** contains EM&V recommendations regarding program implementation that may affect claimed savings. Volume 5 also includes the single and multifamily Low-Income (LI)-Eligible Verification Forms.

### PY2025 TRM 12.0 Call for Updates

Commission staff issued a call for PY2025 TRM updates on March 12, 2024, following the spring EEIP on February 28. Suggestions were submitted by May 1. Table 1 includes the details of the TRM suggestions incorporated into PY2025 TRM v12.0. Any suggestions not incorporated into PY2025 TRM v12.0 are documented in the TRM tracker repository.<sup>1</sup> In 2023, the South-Central Partnership for Energy Efficiency as a Resource requested the TRM Working Group assess additional savings for variable speed heat pumps. Due to insufficient data for the PY2024 TRM 11.0 update, Commission staff and the EM&V team formed a Heat Pump Working Group to gather more robust data to inform a possible PY2025 TRM update. On April 9, 2024,

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<sup>1</sup> TRM Tracker is a TRM Working Group tool used to document the future changes requested to the TRM. Refer to "Program Year 2025 Texas Technical Reference Manual(TRM) Version 12.0" memo filed on July 1, 2024 in Docket No. 56768.

the Heat Pump Working Group (HPWG) Kick-off meeting was held. The HPWG participants included manufacturers, heating, ventilation and air conditioning (HVAC) installers and contractors, energy efficiency organizations, utilities, PUCT, EUMMOT and EM&V contractors. With the support of the HPWG, the TRM working group developed a variable speed heat pump algorithm which was incorporated in Volume 4 of PY2025 TRM 12.0 (See Table 13 below).

**EEIP Review Comments**

The EEIP Stakeholders' comment period ends on October 29, 2024. A summary of the review comments on the PY2025 TRM 12.0 and EM&V responses will be addressed at the end of the stakeholder comment period.

**Table 1. Stakeholders' Suggestions Incorporated in PY2025 TRM v12.0**

<b>TRM volume</b>	<b>Measure</b>	<b>Description</b>	<b>Originator</b>
2	2.5.3 ENERGY STAR® clothes dryer	Added a higher savings tier for heat pump dryers.	TNMP
2	2.5.9 ENERGY STAR® dehumidifiers	Added new measure.	Oncor
2	2.5.10 ENERGY STAR® ventilation fans	Added new measure.	Oncor
2	2.5.10 ENERGY STAR® water coolers	Added new measure.	Oncor
2	2.5.14 ENERGY STAR® electric vehicle supply equipment	Adjusted savings methodology to use a weighted Level 1 and Level 2 baseline.	AEP Texas
3	2.1.1 Lamps and fixtures	Clarified exterior new construction code zone selection guidance, adjusted new construction savings algorithm, updated "Multiple" control type, adjusted non-	CenterPoint & Oncor

TRM volume	Measure	Description	Originator
		operational fixture footnote, in-service rate incorporated into retrofit savings algorithm, clarified building type section guidance, and updated midstream building type weighting assumptions.	
3	2.2.2 Split & packaged AC/HPs	Updated midstream building type weighting assumptions, defined grade levels for primary and secondary schools, updated early retirement age eligibility and criteria related to downsizing, and noted new federal standard and compliance date.	TNMP
3	2.2.9 High-volume low-speed fans	Expanded measure to apply to non-agricultural end uses. Incorporated new efficiency metric for large-diameter fans.	El Paso Electric
3	2.3.2 Window treatments	Updated measure to indicate solar screens must be permanent, fixed, and interior or exterior.	El Paso Electric
3	2.4.3 ENERGY STAR® electric deck ovens	Added measure.	AEP Texas
3	2.4.8 Contact conveyor toasters	Added measure.	AEP Texas
3	2.4.9 Radiant conveyor toasters	Added measure.	AEP Texas
3	2.4.11 ENERGY STAR® refrigerated chef bases	Added measure.	AEP Texas
3	2.4.13 ENERGY STAR® induction cooktops	Added measure.	AEP SWEPCO
3	2.4.14 ENERGY STAR® induction soup wells	Added measure.	AEP Texas
3	2.4.18 Hand wrap machines	Added measure.	AEP Texas
3	2.7.15 Water pumps	Added measure.	Oncor
4	2.1.1 Variable speed heat pumps	Added measure.	HPWG

TRM volume	Measure	Description	Originator
4	2.1.4 Dedicated outdoor air systems	Added measure.	AEP Texas
4	2.2.1 RES new construction	Added pilot option for use of the Home Energy Rating System (HERS) index compliance path. Updated baseline to IECC 2018 or 2021 as applicable.	TRC/Oncor
4	2.5.7 Low pressure irrigation	Added measure.	AEP SWEPCO
4	2.5.8 Irrigation pump VFDs	Added measure.	AEP SWEPCO
4	2.6.1 RES Load Management	Clarified eligible end-uses. Listed "domestic hot water" as an eligible equipment type.	Armada Power

#### PY2025 TRM 12.0 Updates Summary

PY2025 TRM 12.0 updates and additions made in Volumes 2, 3, 4, and 5 are summarized in Tables 2-6, 7-12, 13, and 14, respectively.

**Table 2. Residential PY2025 TRM 12.0 Volume 2 Updates by Measure—Lighting**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Lighting	ENERGY STAR® general service LED lamps	–	–	X	–	–	Clarified federal standard. Updated new construction code high-efficacy lamp requirement.
	ENERGY STAR® specialty and directional LED lamps	–	–	X	–	–	Clarified federal standard. Updated new construction code high-efficacy lamp requirement.
	LED nightlights	–	–	X	–	–	Updated baseline wattage assumption and documentation requirements.

**Table 3. Residential PY2025 TRM 12.0 Volume 2 Updates by Measure—HVAC**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
HVAC	Air conditioner or heat pump tune-up	–	–	X	–	–	Updated tune-up checklist to match ENERGY STAR® HVAC Maintenance Checklist.
	Central mini-split air conditioners and heat pumps	–	–	X	–	–	Clarified documentation requirements.
	Room air conditioners	–	–	X	–	–	No revision.
	Packed terminal heat pumps	–	–	X	–	–	No revision.
	Ground source heat pumps	–	X	X	–	–	<del>No revision.</del> <u>Updated algorithms to match coefficient definitions.</u>
	Large-capacity split-system and single-package air conditioners and heat pumps	–	–	X	–	–	Updated baseline efficiency table.
	Evaporative cooling	–	X	–	–	–	No revision.
	ENERGY STAR® connected thermostats	–	X	–	–	–	Updated heating type weighting. Added electric resistance baseline and documentation requirement.
	Smart thermostat load management	–	X	–	–	–	Added guidance for selecting savings methodology for utilities close to fully deploying automated metering infrastructure (AMI). Added guidance on tracking and reporting load management programs separately from energy efficiency programs.
	Duct sealing	–	–	X	–	X	No revision.

**Table 4. Residential PY2025 TRM 12.0 Volume 2 Updates by Measure—Building Envelope**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Building envelope	Air infiltration	–	X	–	–	X	Clarified application of electric resistance documentation adjustment factor.
	Ceiling insulation	–	X	–	–	–	Clarified application of electric resistance documentation adjustment factor.
	Attic encapsulation	–	X	–	–	–	Clarified application of electric resistance documentation adjustment factor. Updated rounding for infiltration component energy savings.
	Wall insulation	–	X	–	–	–	Clarified application of electric resistance documentation adjustment factor.
	Floor insulation	–	X	–	–	–	Clarified application of electric resistance documentation adjustment factor.
	Duct insulation	–	X	–	–	–	Clarified application of electric resistance documentation adjustment factor.
	Radiant barriers	–	X	–	–	–	Clarified application of electric resistance documentation adjustment factor.
	Cool roofs	–	X	–	–	–	No revision.
	Solar screens	–	X	–	–	–	No revision.
	ENERGY STAR® windows	–	X	–	–	–	Clarified application of electric resistance documentation adjustment factor.
	ENERGY STAR® low-e storm windows	–	X	–	–	–	Clarified application of electric resistance documentation adjustment factor.

**Table 5. Residential PY2025 TRM 12.0 Volume 2 Updates by Measure—Domestic Hot Water**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Domestic water heating	Water heater installation—electric tankless and fuel substitution	–	–	X	–	–	No revision.
	Heat pump water heaters	–	X	–	–	–	Clarified forthcoming federal standard effective and compliance dates.
	Solar water heaters	–	X	–	–	–	Clarified use of high-efficiency ratings.
	Water heater tank insulation	–	X	–	–	–	Updated ambient temperatures and deemed savings.
	Water heater pipe insulation	–	–	X	–	–	Updated ambient temperatures.
	Faucet aerators	–	–	X	–	–	Updated number of faucets per home.
	Low-flow showerheads	–	–	X	–	–	Updated number of showerheads per home.
	Showerhead temperature-sensitive restrictor valves	–	–	X	–	–	Updated number of showerheads per home <u>and resulting behavioral waste and hot water saved assumptions.</u>
	Tub spout and showerhead temperature-sensitive restrictor valves	–	–	X	–	–	Updated number of showerheads per home <u>and resulting behavioral waste and hot water saved assumptions.</u>
	Water heater temperature setback	–	–	X	–	–	No revision.



**Table 6. Residential PY2025 TRM 12.0 Volume 2 Updates by Measure—Appliances**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Appliances	ENERGY STAR® ceiling fans	–	–	X	–	–	No revision.
	ENERGY STAR® clothes washers	–	X	–	–	–	Clarified upcoming federal standard. Incorporated latest ENERGY STAR® specification.
	ENERGY STAR® clothes dryers	–	X	–	–	–	Clarified upcoming federal standard. Added heat pump dryer savings tier.
	ENERGY STAR® dishwashers	–	X	–	–	–	Clarified upcoming federal standard. Incorporated latest ENERGY STAR® specification.
	ENERGY STAR® refrigerators	–	–	X	–	X	Updated early retirement age eligibility and weighting using the latest Residential Energy Consumption Survey (RECS) data. <a href="#">Updated resulting early retirement savings tables.</a> Clarified upcoming federal standard.
	ENERGY STAR® freezers	–	X	–	–	–	Updated early retirement age eligibility and weighting using the latest RECS data. <a href="#">Updated resulting early retirement savings tables.</a> Clarified upcoming federal standard.
	Refrigerator/ freezer recycling	X	–	X	–	–	No revision.
	ENERGY STAR® air purifiers	–	X	–	–	–	No revision.
	ENERGY STAR® dehumidifiers	–	X	–	–	–	TRM v12.0 origin.
	ENERGY STAR® ventilation fans	–	X	–	–	–	TRM v12.0 origin.
	ENERGY STAR® water coolers	–	X	–	–	–	TRM v12.0 origin.
	ENERGY STAR® pool pumps	–	–	X	–	–	No revision.

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
	Advanced power strips	-	X	-	-	-	No revision.
	ENERGY STAR® electric vehicle supply equipment	-	X	-	-	-	Updated savings methodology to use a weighted Level 1 and Level 2 baseline.
	Induction cooking	-	X	-	-	-	No revision.

**Table 7. Nonresidential PY2025 TRM 12.0 Volume 3 Updates by Measure—Lighting**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Lighting	Lamps and fixtures	-	-	X	X	X	Clarified exterior new construction code zone selection guidance, adjusted new construction savings algorithm, updated "Multiple" control type, adjusted non-operational fixture footnote, in-service rate incorporated into retrofit savings algorithm, clarified building type section guidance, and updated midstream building type weighting assumptions.
	Lighting controls	-	-	X	X	X	Consolidated energy adjustment factor (EAF) and power adjustment factor (PAF) coefficient labels to control adjustment factor (CAF).
	Exterior photocell and time clock repair	-	-	X	X	X	No revision.
	LED traffic signals	-	-	X	X	X	No revision.

**Table 8. Nonresidential PY2025 TRM 12.0 Volume 3 Updates by Measure—HVAC**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
HVAC	Air conditioning and heat pump tune-ups	–	–	X	–	X	Updated tune-up checklist to match ENERGY STAR HVAC Maintenance Checklist.
	Split and packaged air conditioners and heat pumps	–	–	X	X	X	Updated midstream building type weighting assumptions, defined grade levels for primary and secondary schools, updated early retirement age eligibility and criteria related to downsizing, and noted new federal standard and compliance date.
	HVAC chillers	–	–	X	X	X	Updated early retirement age eligibility and criteria related to downsizing, updated midstream building type weighting assumptions, and provided guidance for building types.
	Package terminal air conditioners/heat pumps and room air conditioners	–	–	X	X	X	Updated early retirement age eligibility and criteria related to downsizing and updated midstream building type weighting assumptions.
	Computer room air conditioners	–	–	X	X	–	Added early retirement criteria related to downsizing, updated early retirement, and new construction/replace-on-burnout (ROB) baseline efficiency levels.
	Computer room air handler motor efficiency	–	–	X	X	–	No revision.

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
	HVAC variable frequency drives	–	X	X	–	–	Savings calculations moved to Excel. Reviewed hours of operations for fans and pumps and using same fan and pump hours referenced in the existing measure.
	Condenser air evaporative pre-cooling	–	–	X	–	X	Minor text edits.
	High-volume low-speed fans	–	–	X	–	–	Expanded measure to apply to non-agricultural end uses. Incorporated new efficiency metric for large-diameter fans.
	Small commercial evaporative cooling	–	X	X	–	–	No revision.
	Small commercial smart thermostats	–	–	X	X	X	Minor footnote correction.

**Table 9. Nonresidential PY2025 TRM 12.0 Volume 3 Updates by Measure—Building Envelope**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Building envelope	Cool roofs	X	–	X	X	–	No revision.
	Window treatments	X	–	X	X	–	Updated measure to indicate solar screen must be permanent, fixed, and interior or exterior.
	Entrance and exit door air infiltration	–	X	X	–	–	Adjusted savings normalization from per linear foot to per standard door. Updated documentation requirements.

**Table 10. Nonresidential PY2025 TRM 12.0 Volume 3 Updates by Measure—Food Service**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Food service	ENERGY STAR® combination ovens	–	X	X	–	–	Specified reduced operating schedule for education applications. Aligned deemed savings tables and calculations input assumptions to ENERGY STAR March 2024 update.
	ENERGY STAR® electric convection ovens	–	X	X	–	–	Specified reduced operating schedule for education applications and updated corresponding deemed savings tables.
	ENERGY STAR® electric deck ovens	–	X	X	–	–	TRM v12.0 origin.
	ENERGY STAR® dishwashers	–	X	X	–	–	Specified reduced operating schedule for education applications and updated corresponding deemed savings tables. Added guidance for dual sanitizing dishwashers and updated documentation requirements.
	ENERGY STAR® electric griddles	–	X	X	–	–	Specified reduced operating schedule for education applications and updated corresponding deemed savings tables. Updated griddle size to specify a range of griddle sizes based on normal rounding convention. Other minor text updates.
	ENERGY STAR® electric fryers	–	X	X	–	–	Specified reduced operating schedule for education applications and updated corresponding deemed savings tables.
	ENERGY STAR® electric steam cookers	–	X	X	–	–	Specified reduced operating schedule for education applications and updated corresponding

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
							deemed savings tables.
	Contact conveyor toasters	–	X	X	–	–	TRM v12.0 origin.
	Radiant conveyor toasters	–	X	X	–	–	TRM v12.0 origin.
	ENERGY STAR® hot food holding cabinets	–	X	X	–	–	Specified reduced operating schedule for education applications and updated corresponding deemed savings tables.
	ENERGY STAR® refrigerated chef bases	–	X	X	–	–	TRM v12.0 origin.
	ENERGY STAR® ice makers	–	X	X	–	–	Specified reduced operating schedule for education applications and updated corresponding deemed savings tables.
	ENERGY STAR® induction cooktops	–	X	X	–	–	TRM v12.0 origin.
	Induction soup wells	–	X	X	–	–	TRM v12.0 origin.
	Demand controlled kitchen ventilation	–	X	X	–	–	Clarified new construction eligibility, specified reduced operating schedule for education applications, corrected heating interactive effects, updated heating type distribution, and updated corresponding deemed savings tables.
	Pre-rinse spray valves	–	X	X	–	–	Specified reduced operating schedule for education applications.
	Vacuum-sealing and packaging machines	–	X	–	–	–	No revision.
	Hand wrap machines	–	X	–	–	–	TRM v12.0 origin.

**Table 11. Nonresidential PY2025 TRM 12.0 Volume 3 Updates by Measure—Refrigeration**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Refrigeration	Door heater controls	–	X	X	–	–	No revision.
	ECM evaporator fan motors	–	–	X	–	–	Clarified baseline condition and documentation requirements.
	Electronic defrost controls	–	–	X	–	–	Correct peak factor naming convention.
	Evaporator fan controls	–	–	X	–	–	No revision.
	Night covers for open refrigerated display cases	–	X	X	–	–	No revision.
	Solid and glass door reach-ins	–	–	X	–	–	Minor corrections.
	Strip curtains for walk-in refrigerated storage	–	X	–	–	–	No revision.
	Zero-energy doors for refrigerated cases	–	X	X	–	–	No revision.
	Door gaskets for walk-in and reach-in coolers and freezers	–	X	X	–	–	No revision.
	High-speed doors for cold storage	–	X	X	–	–	Updated estimated useful life (EUL) from 5 to 16 years to match recommendations from 2018 Navigant report.

**Table 12. Nonresidential PY2025 TRM 12.0 Volume 3 Updates by Measure—Water Heating and Miscellaneous**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Water heating	Heat pump water heaters	–	–	X	–	–	Cleaned up equation parameter definitions.

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
							Updated building type names to align with TRM Volume 3 naming convention.
	Central domestic hot water controls	–	X	X	–	–	No revision.
	Showerhead temperature sensitive restrictor valves	–	–	X	–	–	No revision.
	Tub spout and showerhead temperature sensitive restrictor valves	–	–	X	–	–	No revision.
Miscellaneous	Variable frequency drives (VFDs) for water pumping	–	X	X	–	–	No revision.
	Premium efficiency motors	–	–	X	–	–	Updated early retirement age eligibility.
	Pump-off controllers	–	X	X	–	–	No revision.
	ENERGY STAR® pool pumps	–	X	X	–	–	Updated baseline condition and deemed savings to reflect current federal standard.
	Lodging guest room occupancy sensor controls	–	X	–	–	–	No revision.
	Vending machine controls	–	X	X	–	–	No revision.
	Computer power management	–	X	X	–	–	No revision.
	ENERGY STAR® electric vehicle supply equipment	–	X	X	–	–	No revision.
	Industrial high-frequency battery chargers	–	X	X	–	–	No revision.
	Steam trap repair and replacement	–	X	X	–	–	Building types realigned in tables.
	Hydraulic gear lubricants	–	–	X	–	–	No revision.



Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
	Hydraulic oils	–	–	X	–	–	No revision.
	Hand dryers	–	X	X	–	–	Updated building type naming convention. Updated peak demand calculation, savings calculation input assumptions, and deemed savings.
	Laser projectors	–	–	X	–	–	No revision.
	Water Pumps	–	–	X	–	–	TRM v12.0 origin.

**Table 13. M&V Protocols PY2025 TRM 12.0 Volume 4 Updates by Measure**

Sector	Measure category	Measure description	12.0 update
Residential	HVAC	Variable speed heat pumps	TRM v12.0 origin.
Residential/ nonresidential	HVAC	Air conditioning tune-ups	Updated measure based on Section 3.2.1 of Volume 1 of the PY2023 IOU Energy Efficiency Report.
Nonresidential	HVAC	Ground source heat pumps	No revision.
Nonresidential	HVAC	Variable refrigerant flow systems (VRF)	Clarified language about current VRF federal standard effective date.
Nonresidential	HVAC	Dedicated outdoor air systems (DOAS)	TRM v12.0 origin.
Residential	Whole house	Residential new construction	Added pilot option for HERS index compliance path. Updated baseline to IECC 2018 or 2021.
Residential	Whole house	Smart home energy management system (SHEMS)	Added in-service rates (ISRs) from TRM Volume 2 residential lighting measures.
Residential	Building energy codes	Residential energy code compliance enhancement	No revision.
Residential and nonresidential	Renewables	Residential and nonresidential solar photovoltaics	No revision.
Residential and nonresidential	Renewables	Solar shingles	No revision.

Sector	Measure category	Measure description	12.0 update
Residential	Renewables	Solar attic fans	No revision.
Nonresidential	Miscellaneous	Behavioral	No revision.
Nonresidential	Miscellaneous	Air compressors less than 75 hp	No revision.
Nonresidential	Miscellaneous	Nonresidential custom	Added EUL for VFDs in non-HVAC applications.
Nonresidential	Miscellaneous	Nonresidential measurement and verification	Adjusted fit metrics for peak demand calculations.
Nonresidential	Miscellaneous	Energy storage	No revision.
Nonresidential	Miscellaneous	ENERGY STAR® Uninterruptible power supply	No revision.
Nonresidential	Miscellaneous	Low pressure irrigation	TRM v12.0 origin.
Nonresidential	Miscellaneous	Irrigation pump variable speed drive (VFD)	TRM v12.0 origin.
Residential	Load management	Residential load curtailment	Clarified eligible end uses. Added guidance on tracking and reporting of load management programs separate from energy efficiency programs.
Nonresidential	Load management	Nonresidential load curtailment	Added guidance on tracking and reporting of load management programs separate from energy efficiency programs.

**Table 14. Implementation Guidance PY2025 TRM 12.0 Volume 5 Updates by Sector**

Sector	Guidance category	12.0 update
Commercial	Project documentation	Updated project documentation to include M&V Plans for programs.
Commercial	Incentives and claimed savings	No revisions.
Commercial	New Construction	Updated code reference.
Low-Income	Income-eligible verification forms	LI income verification forms will be updated in January 2025 once the federal poverty income levels are released for 2/1/2025–1/31/2026.
Low-Income	Audit lists for LI	No revisions.
Cross-sector	Load management programs	No revisions.
Cross-sector	Commercial and residential HVAC	No revisions.

Sector	Guidance category	12.0 update
	split systems without AHRI certification	
Cross-sector	Data model	No revisions.
Low-Income	Appendix A	LI verification forms will be updated in January 2025 once the federal poverty income levels are released for 2/1/2025–1/31/2026.

# **Public Utility Commission of Texas**

**Texas Technical Reference Manual**

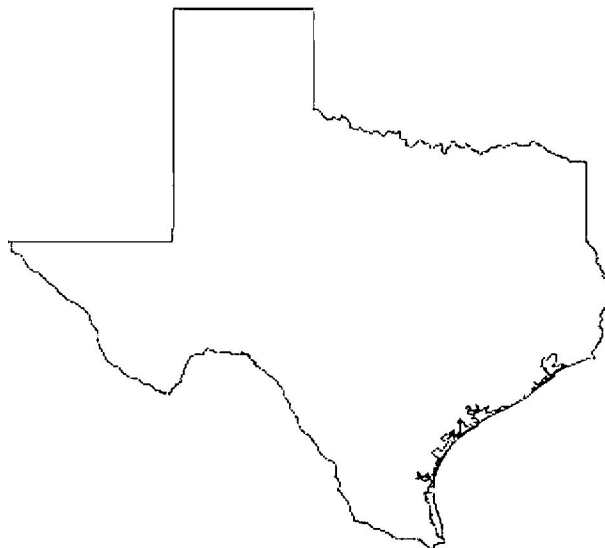
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**Texas Technical Reference Manual**

**Version 12.0**

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## **Acknowledgments**

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## **TRM Technical Support**

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# 1 INTRODUCTION

This volume of the TRM contains the deemed savings for residential measures that have been approved for use in Texas by the Public Utility Commission of Texas (PUCT). This volume includes instructions regarding various savings calculators and reference sources of the information. The TRM serves as a centralized source of deemed savings values. Where appropriate, measurement and verification (M&V) methods by measure category are noted for informational purposes only regarding the basis of projected and claimed savings.

Table 1 provides an overview of the residential measures contained within this program year (PY) 2024 TRM 12.0 Volume 2 and the types of deemed savings estimates available for each one. There are five types of deemed savings estimates identified:

- *Point estimates* that provided a single deemed savings value correspond to a single measure or type of technology.
- *Deemed saving tables* that provide energy and peak savings as a function of size, capacity, building type, efficiency level, or other inputs.
- *Savings algorithms* that require specified primary inputs that must be gathered on site and the identification of default inputs where primary data could not be collected. In many cases, these algorithms are provided as references to deemed savings tables, point estimates, or calculator explanations.
- *Calculators* are used by different utilities and implementers to calculate energy savings for different measures. In many cases, there are several different calculators available for a single measure. Sometimes their background calculators are similar, and in other cases, estimates can vary greatly between each calculator.
- *M&V methods* are also used for some measures to calculate savings in the event that standard equipment is not used, or the specified building types do not apply. For some of these measures, both a simplified M&V approach and a full M&V approach may be allowed by the utility. M&V methods as a source of claimed and projected savings are noted for informational purposes only.

Please consult Volume 1: Overview and User Guide, Section 5: Structure and Content, for details on the organization of the measure templates presented in this volume.

**Table 1. Residential Deemed Savings by Measure Category**

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Lighting	ENERGY STAR® general service LED lamps	–	–	X	–	–	<a href="#">Clarified federal standard. Updated new construction code high-efficacy lamp requirement.</a>

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
	ENERGY STAR® specialty and directional LED lamps	-	-	X	-	-	<a href="#">Clarified federal standard. Updated new construction code high-efficacy lamp requirement.</a>
	LED nightlights	-	-	X	-	-	<a href="#">Updated baseline wattage assumption and documentation requirements.</a>
HVAC	Air conditioner or heat pump tune-up	-	-	X	-	-	<a href="#">Updated tune-up checklist to match ENERGY STAR HVAC Maintenance Checklist.</a>
	Central mini-split air conditioners and heat pumps <del>with SEER2 ratings</del>	-	-	X	-	-	<a href="#">Clarified documentation requirements.</a>
	Room air conditioners	-	-	X	-	-	<a href="#">No revision.</a>
	Packed terminal heat pumps	-	-	X	-	-	<a href="#">No revision.</a>
	Ground source heat pumps	-	X	X	-	-	<a href="#">No revision. Updated algorithms to match coefficient definitions.</a>
	Large-capacity split-system and single-package air conditioners and heat pumps	-	-	X	-	-	<a href="#">Updated baseline efficiency table.</a>
	Evaporative cooling	-	X	-	-	-	No revision.
	ENERGY STAR® connected thermostats	-	X	-	-	-	<a href="#">Updated heating type weighting. Added electric resistance baseline and documentation requirement.</a>
	Smart thermostat load management	-	X	-	-	-	<a href="#">Added guidance for selecting savings methodology for utilities close to fully deploying automated metering infrastructure (AMI). Added guidance on tracking and reporting load management programs separately from energy efficiency programs.</a>
	Duct sealing	-	-	X	-	X	No revision.

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Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
Building envelope	Air infiltration	-	X	-	-	X	<a href="#">Clarified application of electric resistance documentation adjustment factor.</a>
	Ceiling insulation	-	X	-	-	-	<a href="#">Clarified application of electric resistance documentation adjustment factor.</a>
	Attic encapsulation	-	X	-	-	-	<a href="#">Clarified application of electric resistance documentation adjustment factor. Updated rounding for infiltration component energy savings.</a>
	Wall insulation	-	X	-	-	-	<a href="#">Clarified application of electric resistance documentation adjustment factor.</a>
	Floor insulation	-	X	-	-	-	<a href="#">Clarified application of electric resistance documentation adjustment factor.</a>
	Duct insulation	-	X	-	-	-	<a href="#">Clarified application of electric resistance documentation adjustment factor.</a>
	Radiant barriers	-	X	-	-	-	<a href="#">Clarified application of electric resistance documentation adjustment factor.</a>
	Cool roofs	-	X	-	-	-	No revision.
	Solar screens	-	X	-	-	-	<a href="#">No revision.</a>
	ENERGY STAR® windows	-	X	-	-	-	<a href="#">Clarified application of electric resistance documentation adjustment factor.</a>
Domestic water heating	ENERGY STAR® low-e storm windows	-	X	-	-	-	<a href="#">Clarified application of electric resistance documentation adjustment factor.</a>
	Water heater installation—electric tankless and fuel substitution	-	-	X	-	-	<a href="#">No revision.</a>
	Heat pump water heaters	-	X	-	-	-	<a href="#">Clarified forthcoming federal standard effective and compliance dates.</a>
	Solar water heaters	-	X	-	-	-	<a href="#">Clarified use of high-efficiency ratings.</a>

Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
	Water heater tank insulation	-	X	-	-	-	<a href="#">Updated ambient temperatures and deemed savings.</a>
	Water heater pipe insulation	-	-	X	-	-	<a href="#">Updated ambient temperatures.</a>
	Faucet aerators	-	-	X	-	-	<a href="#">Updated number of faucets per home.</a>
	Low-flow showerheads	-	-	X	-	-	<a href="#">Updated number of showerheads per home.</a>
	Showerhead temperature temperature-sensitive restrictor valves	-	-	X	-	-	<a href="#">Updated number of showerheads per home and resulting behavioral waste and hot water saved assumptions.</a>
	Tub spout and showerhead temperature-sensitive restrictor valves	-	-	X	-	-	<a href="#">Updated number of showerheads per home and resulting behavioral waste and hot water saved assumptions.</a>
	Water heater temperature setback	-	-	X	-	-	No revision.
Appliances	ENERGY STAR® ceiling fans	-	-	X	-	-	No revision.
	ENERGY STAR® clothes washers	-	X	-	-	-	<a href="#">Clarified upcoming federal standard. Incorporated latest ENERGY STAR specification.</a>
	ENERGY STAR® clothes dryers	-	X	-	-	-	<a href="#">Clarified upcoming federal standard. Added heat pump dryer savings tier.</a>
	ENERGY STAR® dishwashers	-	X	-	-	-	<a href="#">Clarified upcoming federal standard. Incorporated latest ENERGY STAR specification.</a>
	ENERGY STAR® refrigerators	-	-	X	-	X	<a href="#">Updated early retirement age eligibility and weighting using the latest Residential Energy Consumption Survey (RECS) data. Updated resulting early retirement savings tables. Clarified upcoming federal standard.</a>
	ENERGY STAR® freezers	-	X	-	-	-	<a href="#">Updated early retirement age eligibility and weighting using</a>

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Measure category	Measure description	Point estimates	Deemed savings tables	Savings algorithm	Calculator	M&V	12.0 update
							<a href="#">the latest RECS data. Updated resulting early retirement savings tables. Clarified upcoming federal standard.</a>
	Refrigerator/freezer recycling	X	-	X	-	-	No revision.
	ENERGY STAR® air purifiers	-	X	-	-	-	<a href="#">No revision.</a>
	<a href="#">ENERGY STAR® dehumidifiers</a>	=	<del>X</del>	=	=	=	<a href="#">TRM v12.0 origin.</a>
	<a href="#">ENERGY STAR® ventilation fans</a>	=	<del>X</del>	=	=	=	<a href="#">TRM v12.0 origin.</a>
	<a href="#">ENERGY STAR® water coolers</a>	=	<del>X</del>	=	=	=	<a href="#">TRM v12.0 origin.</a>
	ENERGY STAR® pool pumps	-	-	X	-	-	<a href="#">No revision.</a>
	Advanced power strips	-	X	-	-	-	<a href="#">No revision.</a>
	ENERGY STAR® electric vehicle supply equipment	-	X	-	-	-	<a href="#">Updated savings methodology to use a weighted Level 1 and Level 2 baseline.</a>
	Induction cooking	-	X	-	-	-	<a href="#">No revision.</a>

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## 2 RESIDENTIAL MEASURES

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### 2.1 RESIDENTIAL: LIGHTING

#### 2.1.1 ENERGY STAR® General Service LED Lamps Measure Overview

**TRM Measure ID:** R-LT-GS

**Market Sector:** Residential

**Measure Category:** Lighting

**Applicable Building Types:** Single-family, multifamily; manufactured

**Fuels Affected:** Electricity

**Decision/Action Type(s):** Retrofit, new construction

**Program Delivery Type(s):** Prescriptive and direct install

**Deemed Savings Type:** Deemed savings calculation

**Savings Methodology:** Engineering algorithms and estimates

#### Measure Description

This measure provides a method for calculating savings for the replacement of a standard-efficiency lamp with an ENERGY STAR-compliant LED general service lamp (GSL) in a residential application.<sup>1</sup> This measure applies to all lamps not included in the subsequent measure for Specialty LED Lamps. All lamp types not defined in the Specialty LED Lamps measure should be treated as GSLs.

#### Eligibility Criteria

These savings values rely on usage patterns specific to both indoor and outdoor applications. In lieu of collecting lamp location, a default weighting of 90.5 percent indoor and 9.5 percent outdoor may be assumed.<sup>2</sup>

New homes must exceed the lighting equipment requirements of the current state building code (IECC 2015) to be eligible for prescriptive lighting savings.

Fixtures with integrated LEDs may be eligible under this measure using a modified baseline.

---

<sup>1</sup> DOE Final Rule: Definitions for General Service Lamps. <https://www.regulations.gov/document/EERE-2021-BT-STD-0012-0022>.

<sup>2</sup> 2015 US Lighting Market Characterization, Department of Energy. November 2017. Table 4.11. [https://www.energy.gov/sites/prod/files/2017/12/f46/lmc2015\\_nov17.pdf](https://www.energy.gov/sites/prod/files/2017/12/f46/lmc2015_nov17.pdf).

## Baseline Condition

On May 8, 2022, the Department of Energy (DOE) issued two final rules relating to GSLs:

- Energy Conservation Program: Definitions for General Service Lamps, effective July 8, 2022, which expanded the definition of GSLs.<sup>3</sup>
- Energy Conservation Program: Energy Conservation Standards for General Service Lamps, effective July 25, 2022, which shifted the baseline to 45 lumens/watt efficacy.<sup>4</sup>

~~These guidelines are reinforced in the current federal standard, effective July 3, 2024.~~<sup>5</sup>

The baseline is assumed to be the second-tier Energy Independence and Security Act of 2007 (EISA)-mandated efficiency for a GSL. The EISA regulations dictate that GSLs must comply with a 45 lumen/watt efficacy standard at time of sale beginning January 1, 2023. ~~However, due to the DOE enforcement schedule, savings may be claimed against the first-tier EISA baseline through February 28, 2023, at the utility's discretion.~~

For low-income and hard-to-reach direct install programs, utilities may claim additional savings for early retirement of incandescent and halogen lamps with LEDs when documentation requirements are met. It is assumed that the remaining useful life (RUL) of the existing lamps is two years. This is when the incandescent or halogen lamp baseline bulbs will be at the end of their useful life and need to be replaced. First year savings are weighted using the dual baseline methodology for the first-tier and second-tier baselines found in Table 2 and Table 3. The first-tier baseline may only be used in this scenario.

New construction applications use the same baselines; however, savings can only be claimed for efficient lighting installed above the minimum ~~amount~~ 90 percent high-efficacy lighting required by code.<sup>6</sup> ~~Current code dictates 75 percent high-efficacy lighting.~~ Therefore, if 100 percent of installed lighting is high-efficacy, savings can be claimed for the remaining 1025 percent of installed lamps.

Due to the variability among fixture types compared to screw-in lamps, qualified fixtures with integrated LEDs should use the rated installed wattage and equivalent wattage, or other approved custom methodology, in lieu of the deemed values outlined in Table 2 and Table 3. These wattages are available on the ENERGY STAR certificate and can be used in combination with the deemed savings methodologies provided in this measure.

<sup>3</sup> DOE Final Rule: Definitions for General Service Lamps. <https://www.regulations.gov/document/EERE-2021-BT-STD-0012-0022>.

<sup>4</sup> DOE Final Rule: Energy Conservation Standards for General Service Lamps. <https://www.regulations.gov/document/EERE-2021-BT-STD-0005-0070>.

<sup>5</sup> DOE Final Rule: Energy Conservation Standards for General Service Lamps. <https://www.regulations.gov/document/EERE-2022-BT-STD-0022-0205>.

<sup>6</sup> EM&V market research demonstrates standard builder practice references IECC 2018 or higher based on local code adoption. IECC 2018 R404.1. <https://codes.iccsafe.org/content/IECC2018P5/chapter-4-residential-energy-efficiency>.



**Table 2. GSL LEDs—Baseline and Default Wattages for A-Shaped Lamps<sup>7,8</sup>**

Minimum lumens	Maximum lumens	Incandescent equivalent wattage	1 <sup>st</sup> tier EISA 2007 ( $W_{Base}$ ) <sup>9</sup>	2 <sup>nd</sup> tier EISA 2007 ( $W_{Base}$ ) <sup>10</sup>	Default $W_{Post}$ (if unknown) <sup>11</sup>
250	309	25	Exempt	Exempt	3.5
310	749	40	29	12	5.5
750	1,049	60	43	20	9.0
1,050	1,489	75	53	28	11.5
1,490	2,600	100	72	45	15.0
2,601	3,300	150	Exempt	66	22.5

**Table 3. GSL LEDs—Baseline and Default Wattages for Other Lamp Shapes<sup>12,13</sup>**

Minimum lumens	Maximum lumens	Incandescent equivalent wattage <sup>14</sup>	1 <sup>st</sup> tier EISA 2007 ( $W_{Base}$ ) <sup>15</sup>	2 <sup>nd</sup> tier EISA 2007 ( $W_{Base}$ ) <sup>16</sup>	$W_{Post}$ (if unknown) <sup>17</sup>
250	309	Qualified Products List (QPL)	Exempt	Exempt	QPL
310	749	–	29	12	
750	1,049	–	43	20	
1,050	1,489	–	53	28	
1,490	2,600	–	72	45	
2,601	3,300	QPL	Exempt	66	

<sup>7</sup> Federal standard for General Service Incandescent Lamps (GSIL):

[https://www1.eere.energy.gov/buildings/appliance\\_standards/standards.aspx?productid=20](https://www1.eere.energy.gov/buildings/appliance_standards/standards.aspx?productid=20).

<sup>8</sup> If exempt, refer to the incandescent equivalent wattage.

<sup>9</sup> 1<sup>st</sup> tier baseline is only applicable to low-income and hard-to-reach direct install programs. This baseline is only applicable for two years, equivalent to the expected life of an incandescent lamp.

<sup>10</sup> Non-exempt baseline wattages are calculated by dividing the midpoint of the specified lumen range by the 45 lumens/watt efficacy standard.

<sup>11</sup> Average rated wattage from the ENERGY STAR QPL rounded to nearest half-watt:

<https://www.energystar.gov/productfinder/product/certified-light-bulbs/results>.

<sup>12</sup> Federal standard for General Service Incandescent Lamps (GSIL):

[https://www1.eere.energy.gov/buildings/appliance\\_standards/standards.aspx?productid=20](https://www1.eere.energy.gov/buildings/appliance_standards/standards.aspx?productid=20).

<sup>13</sup> If exempt, refer to incandescent equivalent wattage.

<sup>14</sup> Due to large variation in lamp types, use rated value from the ENERGY STAR QPL:

<https://www.energystar.gov/productfinder/product/certified-light-bulbs/results>.

<sup>15</sup> 1<sup>st</sup> tier baseline is only applicable to low-income and hard-to-reach direct install programs. This baseline is only applicable for two years, equivalent to the expected life of an incandescent lamp.

<sup>16</sup> Non-exempt baseline wattages are calculated by dividing the midpoint of the specified lumen range by the 45 lumens/watt efficacy standard.

<sup>17</sup> Due to large variation in lamp types, use rated value from ENERGY STAR:

<https://www.energystar.gov/productfinder/product/certified-light-bulbs/results>.

## High-Efficiency Condition

The high-efficiency condition is the wattage of the replacement lamp. LEDs must be ENERGY STAR-compliant<sup>18</sup> for the relevant lamp shape being installed as outlined in the ~~current~~ latest ENERGY STAR specification, effective January 2, 2017.<sup>19</sup> Alternatively, lab testing reports (e.g., LM-79, LM-80, TM-21, ISTMT) are also accepted as a method of certification

## Energy and Demand Savings Methodology

### Savings Algorithms and Input Variables

Wattage reduction is defined as the difference between the wattage of a standard baseline lamp, according to EISA 2007 (see Table 2 and Table 3) and the wattage of a comparable GSL LED. An LED is considered comparable to the baseline lamp if they are aligned on the lumen output ranges set out in EISA 2007.

For new construction projects, programs should calculate savings using the methodology in this section for all efficient lamps installed in the home. The program should claim savings for the percentage of installed high-efficacy lamps that exceed the minimum required by code, which is currently 75 percent of lamps. For example, if a new home is built with high-efficacy lamps in 85 percent of the permanently installed fixtures, the program would claim 10 percent of the total calculated savings.

### Energy Savings

Annual energy (kWh) savings are calculated as follows.

$$\text{Energy Savings } [\Delta kWh] = \frac{(W_{base} - W_{post})}{1,000} \times \text{Hours} \times \text{ISR} \times \text{IEF}_E$$

Equation 1

Where:

- $W_{base}$  = Baseline wattage corresponding with the lumen output of the purchased LED lamp for the year purchased/installed; reduced baselines are provided for EISA-compliant lamps in Table 2
- $W_{post}$  = Actual wattage of LED purchased/installed (if unknown, use default wattages from Table 2)

<sup>18</sup> ENERGY STAR QPL: <https://www.energystar.gov/productfinder/product/certified-light-bulbs/results>

<sup>19</sup> ENERGY STAR Program Requirements Product Specification for Lamps (Light Bulbs), Eligibility Criteria Version 2.1. [https://www.energystar.gov/sites/default/files/ENERGY%20STAR%20Lamps%20V2.1%20Final%20Specification\\_1.pdf](https://www.energystar.gov/sites/default/files/ENERGY%20STAR%20Lamps%20V2.1%20Final%20Specification_1.pdf).

- HOU* = Average hours of use per year = 803 hours (for interior/exterior applications calculated based on an average daily usage of 2.2 hours per day<sup>20</sup>)
- IEF<sub>E</sub>* = Interactive effects factor to account for cooling energy savings and heating energy penalties associated with lighting power reductions (see Table 4)
- ISR* = In-service rate, the percentage of incentivized units that are installed and in use (rather than removed, stored, or burnout) to account for units incentivized but not operating (see Table 5)
- 1,000 = Constant to convert from W to kW

**Table 4. GSL LEDs—Interactive Effects for Cooling Energy Savings and Heating Energy Penalties<sup>21</sup>**

Heating/cooling type*	IEF <sub>E</sub>				
	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Gas heat with AC	1.06	1.13	1.17	1.15	1.12
Gas heat with no AC	1.00	1.00	1.00	1.00	1.00
Heat pump	0.91	1.00	1.05	1.11	0.97
Electric resistance heat with AC	0.65	0.80	0.90	1.00	0.75
Electric resistance heat with no AC	0.57	0.69	0.76	0.83	0.65
No heat with AC	1.06	1.13	1.17	1.15	1.12
Unconditioned space	1.00	1.00	1.00	1.00	1.00
Heating/cooling unknown <sup>22</sup>	0.88	0.98	1.04	1.07	0.95

\* IEF for homes with no AC is most appropriate for customers with evaporative cooling or room air conditioners.

<sup>20</sup> The average daily usage of 2.2 hours per day is a blended value for indoor and outdoor lamps. Source: Evaluation of 2008 Texas 'Make Your Mark' Statewide CFL Program Report. Frontier Energy. June 2009.

<sup>21</sup> Extracted from BEopt energy models used to estimate savings for envelope measures. Referencing the EISA baseline table, the typical lumen output was determined by taking the midpoint for the 60-watt equivalent lamp (900 lumens), which was assumed to be the most typical installation. The resulting lumens were divided by the default wattage for incandescents (43 W), CFLs (13 W), and LEDs (10 W) resulting in an assumed efficacy for incandescents (21 lm/W), CFLs (70 lm/W), and LEDs (90 lm/W). IEF values were calculated using the following formula:  $1 + \text{HVAC}_{\text{savings}} / \text{Lighting}_{\text{savings}}$ .

<sup>22</sup> Calculated using IEFs from Cadmus report, weighted using TMY CDD and HDD for Texas, and adjusted to exclude 16 percent outdoor lighting except for upstream defaults. Cadmus report: Cadmus. Entergy Energy-Efficiency Portfolio Evaluation Report 2013 Program Year. Prepared for Entergy Arkansas, Inc. March 14, 2014. Docket No. 07-082-TF.

**Table 5. GSL LEDs—In-Service Rates by Program Type**

<b>Program type</b>	<b>ISR</b>
Low-income community kits <sup>23</sup>	0.88
All other kit programs <sup>24</sup>	0.60
Retail (time of sale) <sup>25</sup>	0.76
Midstream/upstream	
Direct install <sup>26</sup>	0.97

### **Demand Savings**

Summer and winter demand savings are determined by applying a coincidence factor associated with each season.

$$\text{Summer Peak Demand Savings } [\Delta kW] = \frac{(W_{base} - W_{post})}{1,000} \times CF_S \times ISR \times IEF_{D,S}$$

**Equation 2**

$$\text{Winter Peak Demand Savings } [\Delta kW] = \frac{(W_{base} - W_{post})}{1,000} \times CF_W \times ISR \times IEF_{D,W}$$

**Equation 3**

Where:

- $CF_{SW}$  = Seasonal peak coincidence factor (see Table 6)
- $IEF_D$  = Interactive effects factor to account for cooling demand savings or heating demand penalties associated with lighting power reductions (see Table 7)

<sup>23</sup> Kits targeting low-income qualified communities. From Illinois TRM v10, based on 2018 Ameren Illinois income-qualified participant survey. Representative of first-year installations.

<sup>24</sup> From Illinois TRM v10 based on evaluation of ComEd PY9 Elementary Energy Education program. Representative of first-year installations.

<sup>25</sup> From Illinois TRM v10 based on evaluations of ComEd PY8, PY9, and CY2018 and Ameren PY8 programs. Representative of first-year installations.

<sup>26</sup> Dimetrosky, S., Parkinson, K. and Lieb, N. "Residential Lighting Evaluation Protocol – The Uniform Methods Project: Methods for Determining Energy Efficiency Savings for Specific Measures." January 2015. ISR for upstream programs, including storage lamps installed within four years of purchase. <http://energy.gov/sites/prod/files/2015/02/f19/UMPCchapter21-residential-lighting-evaluation-protocol.pdf>.

**Table 6. GSL LEDs—Coincidence Factors<sup>27</sup>**

Season	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Summer	0.060	0.053	0.063	0.059	0.032
Winter	0.275	0.232	0.199	0.263	0.358

**Table 7. GSL LEDs—Interactive Effects Factor for Cooling Demand Savings and Heating Demand Penalties<sup>28</sup>**

IEF <sub>D,S</sub>					
Heating/cooling type*	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Gas heat with AC	1.45	1.33	1.68	1.23	1.44
Gas heat with no AC	1.00	1.00	1.00	1.00	1.00
Heat pump	1.45	1.33	1.68	1.23	1.44
Electric resistance heat with AC	1.45	1.33	1.68	1.23	1.44
Electric resistance heat with no AC	1.00	1.00	1.00	1.00	1.00
No heat with AC	1.45	1.33	1.68	1.23	1.44
Unconditioned space	1.00	1.00	1.00	1.00	1.00
Heating/cooling unknown <sup>29</sup>	1.39	1.28	1.58	1.20	1.38
IEF <sub>D,W</sub>					
Heating/cooling type*	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Gas heat with AC	0.98	0.98	0.98	0.98	0.98
Gas heat with no AC	1.00	1.00	1.00	1.00	1.00
Heat pump	0.71	0.67	0.65	0.74	0.81
Electric resistance heat with AC	0.44	0.36	0.38	0.42	0.52
Electric resistance heat with no AC	0.44	0.36	0.38	0.42	0.52
No heat with AC	0.98	0.98	0.98	0.98	0.98
Unconditioned space	1.00	1.00	1.00	1.00	1.00
Heating/cooling unknown <sup>30</sup>	0.76	0.72	0.73	0.75	0.80

\* IEF for homes with no AC is most appropriate for customers with evaporative cooling or room air conditioners.

<sup>27</sup> See Volume 1.

<sup>28</sup> Refer to Table 4.

<sup>29</sup> Ibid.

<sup>30</sup> Ibid.

### **Low-Income and Hard-to-Reach Direct Install Programs**

Annual energy (kilowatt-hours, kWh) and peak demand (kilowatts, kW) may be calculated separately for two time periods:

The estimated remaining life of the equipment that is being removed (incandescent or halogen lamp), designated the remaining useful life (RUL), and

The remaining time in the EUL period (EUL – RUL).

Annual energy and peak demand savings are calculated by weighting the early retirement and replace-on-burnout savings by the RUL of the unit and the remainder of the EUL period, as outlined in the Volume 3 appendices.

Where:

*RUL* = Remaining useful life = 2 years

*EUL* = Estimated useful life = 16 or 20 years (see Measure Life and Lifetime Savings section)

### **Upstream/Midstream Program Assumptions**

All GSLs with an equivalent wattage of 100 W or lower distributed through upstream or midstream programs should calculate savings using a combination of residential and non-residential savings methodologies with 95 percent of savings allocated to the residential sector and the remaining five percent of savings allocated to the commercial sector.<sup>31</sup> While only summer demand savings are specified for the commercial sector, winter demand savings are allowed for the portion of savings allocated to the residential sector.

### **Deemed Energy Savings Tables**

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### **Deemed Summer Demand Savings Tables**

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### **Deemed Winter Demand Savings Tables**

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### **Claimed Peak Demand Savings**

Refer to Volume 1, Section 4 for further details on peak demand savings and methodology.

<sup>31</sup> Weighting assumptions based on statewide evaluator review of LED purchasing behavior for similar program designs as referenced in the 2018 EM&V Upstream Lighting memo.

## Additional Calculators and Tools

Not applicable.

## Measure Life and Lifetime Savings

Historically, the average measure life is based upon the rated lamp life of the LED. The measure life assumes an average use of 2.2 hours per day based on blended usage for indoor/outdoor applications and applies a 0.85 degradation factor to indoor/outdoor LEDs.

$$EUL_{Total} = \frac{Rated\ Life \times DF}{HOU \times 365.25}$$

Equation 4

Where:

- Rated Life* = 10,000 hours, 12,000 hours, 15,000 hours, or 20,000 hours, as specified by the manufacture; if unknown, assume a 10,000-hour lifetime<sup>32</sup>
- DF* = 0.85 degradation factor<sup>33</sup>
- HOU* = 2.2 hours per day<sup>34</sup>

Table 8. GSL LEDs—Estimated Useful Life

Range of rated measure life (hours)	Assumed rated measure life (hours)	Rated product lifetime (years)
≤ 17,500	15,000	16
> 17,500	20,000	20*

\* Measure life capped at 20 years. EUL may be deemed at 16 years in lieu of documenting the customer baseline.

## Program Tracking Data and Evaluation Requirements

Primary inputs and contextual data that should be specified and tracked by the program database to inform the evaluation and apply the savings properly are:

- Climate zone or county
- Program delivery type (low-income targeted kits, non-low-income targeted kits, retail, direct install, midstream/upstream)

<sup>32</sup> Minimum lifetime requirement under ENERGY STAR Lamps Specification V2.1, effective January 2, 2017. <https://www.energystar.gov/sites/default/files/ENERGY%20STAR%20Lamps%20V2.1%20Final%20Specification.pdf>.

<sup>33</sup> ENERGY STAR CFL Third Party Testing and Verification Off-the-Shelf CFL Performance: Batch 3. Figure 27, p. 47.

<sup>34</sup> The average daily usage of 2.2 hours per day is a blended value for indoor and outdoor lamps. Source: Evaluation of 2008 Texas 'Make Your Mark' Statewide CFL Program Report. Frontier Energy. June 2009.

- LED ANSI C79.1-2002 nomenclature/lamp shape (A, C, G, R, PAR, etc.)
- LED quantityNumber of LEDs installed
- LED manufacturer and model number
- LED rated wattageWattage of each replacement LED
- LED rated lumensLumen output of each replacement LED
- LED rated lifetime (hours)Manufacturer-rated lifetime of each replacement LED in hours
- Heating system type (gas, electric resistance, heat pump, none, unknown)
- Cooling system type (air conditioner, evaporative, none, unknown)
- Location of replacement lamp (conditioned, unconditioned, or outdoor); only required when not assuming default weighting
- Proof of purchase – with date of purchase and quantity
  - Alternative: representative photos of replacement units or another pre-approved method of installation verification
- ENERGY STAR certificate matching replacement model number
  - Alternative: another pre-approved method of certification (e.g., LM-79, LM-80, TM-21 ISTMT lap reports)
- For low-income and hard-to-reach direct install programs, photo documentation clearly showing the lamp type and approximate quantity replaced or other pre-approved method of verification
- For new construction projects only, these data points must be gathered for all permanently installed fixtures in the home to document the percentage that are high-efficacy.

## **References and Efficiency Standards**

### **Petitions and Rulings**

Not applicable.

### **Relevant Standards and Reference Sources**

Please refer to measure citations for relevant standards and reference sources.



## Document Revision History

Table 9. GSL LEDs—Revision History

TRM version	Date	Description of change
v3.0	4/10/2015	TRM v3.0 origin.
v3.1	11/05/2015	TRM v3.1 update. Modification of in-service rate, revision of interactive effects factors to reflect indoor-specific values for additional heating and cooling equipment types. Provided default input assumptions for upstream lighting programs. Capped estimated measure life.
v3.1	3/28/2016	TRM v3.1 March revision. Updated summer and winter coincidence factors.
v4.0	10/10/2016	TRM v4.0 update. Updated IEF values and useful life estimates.
v5.0	10/2017	TRM v5.0 update. Updated EUL algorithm to account for baseline change beginning in 2021. Included language to deem EUL.
v6.0	11/2018	TRM v6.0 update. Updated useful life estimates. Updated interactive effects factors.
v7.0	10/2019	TRM v7.0 update. Removed dual baseline and updated useful life estimates. Added invoice and certificate requirements. Added option for new construction savings.
v8.0	10/2020	TRM v8.0 update. Defined midstream methodology and clarified default wattages by lumen range.
v9.0	10/2021	TRM v9.0 update. Updated midstream methodology and added path for fixtures.
v10.0	10/2022	TRM v10.0 update. Updated for compliance with new DOE GSL definition and reinstatement of EISA 45 lumens/watt backstop.
v11.0	10/2023	TRM v11.0 update. Added in-service rates by program type.
<u>v12.0</u>	<u>10/2024</u>	<u>TRM v12.0 update. Clarified federal standard. Updated new construction code high-efficacy lamp requirement.</u>

## 2.1.2 ENERGY STAR® Specialty LED Lamps Measure Overview

**TRM Measure ID:** R-LT-SP

**Market Sector:** Residential

**Measure Category:** Lighting

**Applicable Building Types:** Single-family, multifamily, manufactured

**Fuels Affected:** Electricity

**Decision/Action Type(s):** Retrofit, new construction

**Program Delivery Type(s):** Prescriptive and direct install

**Deemed Savings Type:** Deemed savings calculation

**Savings Methodology:** Engineering algorithms and estimates

### Measure Description

This measure provides a method for calculating savings for replacement of an incandescent or halogen reflector or decorative lamp with an ENERGY STAR-compliant LED specialty lamp in a residential application. These lamps are limited to the following lamp types, defined by the current federal standard<sup>35</sup> and further reduced to only include lamps that are common to utility rebate programs.

- G-shape lamps that have a first number symbol less than or equal to 12.5 (diameter less than or equal to 1.5625 inches)
- G-shape lamps with a diameter of five inches or more
- MR-shape lamps that have a first symbol equal to 16 (diameter equal to two inches) and have a lumen output greater than or equal to 800 lumens
- Reflector lamps that have a first number symbol less than 16 (diameter less than two inches) and that do not have E26/E24, E26d, E26/50x39, E26/53x39, E29/28, E29/53x39, E39, E39d, EP39, or EX39 bases

### Eligibility Criteria

These savings values rely on usage patterns specific to both indoor and outdoor applications. In lieu of collecting lamp location, a default weighting of 90.5 percent indoor and 9.5 percent outdoor may be assumed.<sup>36</sup>

New homes must exceed the lighting equipment requirements of the current state building code (IECC 2015) to be eligible for prescriptive lighting savings.

<sup>35</sup> DOE Final Rule: Definitions for General Service Lamps. <https://www.regulations.gov/document/EERE-2021-BT-STD-0012-0022>.

<sup>36</sup> 2015 US Lighting Market Characterization, Department of Energy, November 2017. Table 4.11. [https://www.energy.gov/sites/prod/files/2017/12/f46/lmc2015\\_nov17.pdf](https://www.energy.gov/sites/prod/files/2017/12/f46/lmc2015_nov17.pdf).

Fixtures with integrated LEDs may be eligible under this measure using a modified baseline.

## Baseline Condition

On May 8, 2022, the Department of Energy (DOE) issued two final rules relating to general service lamps:

- Energy Conservation Program: Definitions for General Service Lamps (GSL), effective July 8, 2022, which expanded the definition of general service lamp.<sup>37</sup>
- Energy Conservation Program: Energy Conservation Standards for General Service Lamps, effective July 25, 2022, which shifted the baseline to 45 lumens per watt efficacy.<sup>38</sup>

These guidelines are reinforced in the current federal standard, effective July 3, 2024.<sup>39</sup>

For all products not defined as GSLs, the baseline is assumed to be the incandescent equivalent wattage. The baseline wattage will be determined based on the bulb shape of the installed lamp, as outlined below. ~~New construction applications use the same baselines. However, savings can only be claimed for efficient lighting installed above the minimum amount required by code. Current code dictates 75 percent high-efficacy lighting. Therefore, if 100 percent of installed lighting is high-efficacy, savings can be claimed for the remaining 25 percent of installed lamps.~~ New construction applications use the same baselines; however, savings can only be claimed for efficient lighting installed above the minimum 90 percent high-efficacy lighting required by code.<sup>40</sup> Therefore, if 100 percent of installed lighting is high-efficacy, savings can be claimed for the remaining 10 percent of installed lamps.

Due to the variability among fixture types compared to screw-in lamps, qualified fixtures with integrated LEDs should use the rated installed wattage and equivalent wattage, or other approved custom methodology, in lieu of the deemed values outlined in this section. These wattages are available on the ENERGY STAR certificate and can be used in combination with the deemed savings methodologies provided in this measure.

<sup>37</sup> DOE Final Rule: Definitions for General Service Lamps. <https://www.regulations.gov/document/EERE-2021-BT-STD-0012-0022>.

<sup>38</sup> DOE Final Rule: Energy Conservation Standards for General Service Lamps. <https://www.regulations.gov/document/EERE-2021-BT-STD-0005-0070>.

<sup>39</sup> DOE Final Rule: Energy Conservation Standards for General Service Lamps. <https://www.regulations.gov/document/EERE-2022-BT-STD-0022-0205>.

<sup>40</sup> EM&V market research demonstrates standard builder practice references IECC 2018 or higher based on local code adoption. IECC 2018 R404.1. <https://codes.iccsafe.org/content/IECC2018P5/chapter-4-re-residential-energy-efficiency>.

Table 10. Specialty LEDs—Baseline and Default Wattages<sup>41</sup>

Lamp type <sup>42</sup>	Minimum lumens	Maximum lumens	W <sub>Base</sub>
G-shape with diameter ≥ 5 in. <sup>43</sup>	–	–	Qualified Products List (QPL)
MR16/MRX16	800	–	75
R14	250	299	25

## High- Efficiency Condition

The high-efficiency condition is the wattage of the replacement lamp. LEDs must be ENERGY STAR-compliant<sup>44</sup> for the relevant lamp shape being removed as outlined in the ~~current~~<sup>latest</sup> ENERGY STAR specification, effective January 2, 2017.<sup>45</sup> Alternatively, lab testing reports (e.g., LM-79, LM-80, TM-21, ISTMT) are also accepted as a method of certification.

## Energy and Demand Savings Methodology

### Savings Algorithms and Input Variables

Wattage reduction is defined as the difference between the wattage of a specialty baseline lamp and the wattage of a directional or specialty LED.

For new construction projects, programs should calculate savings using the methodology in this section for all efficient lamps installed in the home. The program should claim savings for the percentage of installed high-efficacy lamps that exceed the minimum required by code, which is currently 75 percent of lamps. For example, if a new home is built with high-efficacy lamps in 85 percent of the permanently installed fixtures, the program would claim 10 percent of the total calculated savings.

### Energy Savings Algorithms

Annual energy (kWh) savings are calculated as follows:

$$\text{Energy Savings } [\Delta kWh] = \frac{(W_{base} - W_{post})}{1,000} \times HOU \times ISR \times IEF_E$$

<sup>41</sup> Due to large variation in lamp types, use rated value from ENERGY STAR QPL where not specified: <https://www.energystar.gov/productfinder/product/certified-light-bulbs/results>.

<sup>42</sup> Lamp types excluded from this table were not included on the ENERGY STAR QPL. For missing lamp types, refer to the equivalent and rated wattages from the ENERGY STAR certification.

<sup>43</sup> G-shape lamps are not included because there were very few ENERGY STAR-qualified products with a diameter of 5 inches or more. For these products, use the equivalent and rated wattages from the ENERGY STAR certification.

<sup>44</sup> ENERGY STAR QPL: <https://www.energystar.gov/productfinder/product/certified-light-bulbs/results> <https://www.energystar.gov/productfinder/product/certified-light-bulbs/results>.

<sup>45</sup> ENERGY STAR ~~specification~~ Program Requirements Product Specification for Lamps (Light Bulbs), Eligibility Criteria Version 2.1: [https://www.energystar.gov/sites/default/files/ENERGY%20STAR%20Lamps%20V2.1%20Final%20Specification\\_1.pdf](https://www.energystar.gov/sites/default/files/ENERGY%20STAR%20Lamps%20V2.1%20Final%20Specification_1.pdf) <http://www.energystar.gov/products/certified-products/detail/light-bulbs>.

Equation 5

Where:

$W_{base}$	=	<i>EISA-exempt specialty lamp or a DOE-ruling-exempt reflector (see Table 10)</i>
$W_{post}$	=	<i>Actual wattage of LED purchased/installed</i>
$HOU$	=	<i>Average hours of use per year = 803 hours (for interior/exterior applications calculated based on an average daily usage of 2.2 hours per day<sup>46</sup>)</i>
$IEF_E$	=	<i>Interactive effects factor to account for cooling energy savings and heating energy penalties associated with lighting power reductions (see Table 11)</i>
$ISR$	=	<i>In-service rate, the percentage of incentivized units that are installed and in use (rather than removed, stored, or burnt out) to account for units incentivized but not operating (see Table 12)</i>
1,000	=	<i>Constant to convert from W to kW</i>

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<sup>46</sup> The average daily usage of 2.2 hours per day is a blended value for indoor and outdoor lamps. Source: Evaluation of 2008 Texas 'Make Your Mark' Statewide CFL Program Report. Frontier Energy (formerly Associates). June 2009.

**Table 11. Specialty LEDs—Interactive Effects for Cooling Energy Savings and Heating Energy Penalties<sup>47</sup>**

IEF <sub>E</sub>					
Heating/cooling type*	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Gas heat with AC	1.06	1.13	1.17	1.15	1.12
Gas heat with no AC	1.00	1.00	1.00	1.00	1.00
Heat pump	0.91	1.00	1.05	1.11	0.97
Electric resistance heat with AC	0.65	0.80	0.90	1.00	0.75
Electric resistance heat with no AC	0.57	0.69	0.76	0.83	0.65
No heat with AC	1.06	1.13	1.17	1.15	1.12
Unconditioned space	1.00	1.00	1.00	1.00	1.00
Heating/cooling unknown <sup>48</sup>	0.88	0.98	1.04	1.07	0.95

\* IEF for homes with no AC is most appropriate for customers with evaporative cooling or room air conditioners.

**Table 12. Specialty LEDs—In-Service Rates by Program Type**

Program type	ISR
Low-income community kits <sup>49</sup>	0.88
All other kit programs <sup>50</sup>	0.60
Retail (time of sale) <sup>51</sup>	0.76
Direct install <sup>52</sup>	0.97

<sup>47</sup> Extracted from BEopt energy models used to estimate savings for envelope measures. Referencing the EISA baseline table, the typical lumen output was determined by taking the midpoint for the 60-watt equivalent lamp (900 lm), which was assumed to be the most typical installation. The resulting lumens were divided by the default wattage for incandescents (43 W), CFLs (13 W), and LEDs (10 W) resulting in an assumed efficacy for incandescents (21 lm/W), CFLs (70 lm/W), and LEDs (90 lm/W). IEF values were calculated using the following formula:  $1 + \text{HVAC}_{\text{savings}} / \text{Lighting}_{\text{savings}}$ .

<sup>48</sup> Calculated using IEFs from Cadmus report, weighted using TMY CDD and HDD for Texas, and adjusted to exclude 16 percent outdoor lighting except for upstream defaults. Cadmus report: Cadmus. Entergy Energy-Efficiency Portfolio Evaluation Report 2013 Program Year. Prepared for Entergy Arkansas, Inc. March 14, 2014. Docket No. 07-082-TF.

<sup>49</sup> Kits targeting low-income qualified communities. From Illinois TRM v10, based on 2018 Ameren Illinois income-qualified participant survey. Representative of first-year installations.

<sup>50</sup> From Illinois TRM v10 based on evaluation of ComEd PY9 Elementary Energy Education program. Representative of first-year installations.

<sup>51</sup> From Illinois TRM v10 based on evaluations of ComEd PY8, PY9, and CY2018 and Ameren PY8 programs. Representative of first-year installations.

<sup>52</sup> Dimetrosky, S., Parkinson, K. and Lieb, N. "Residential Lighting Evaluation Protocol – The Uniform Methods Project: Methods for Determining Energy Efficiency Savings for Specific Measures." January 2015. ISR for upstream programs, including storage lamps installed within four years of purchase. <http://energy.gov/sites/prod/files/2015/02/f19/UMPCchapter21-residential-lighting-evaluation-protocol.pdf>.

## Demand Savings Algorithms

Summer and winter demand savings are determined by applying a coincidence factor associated with each season.

$$\text{Summer Peak Demand Savings } [\Delta kW] = \frac{(W_{base} - W_{post})}{1,000} \times CF_S \times ISR \times IEF_{D,S}$$

**Equation 6**

$$\text{Winter Peak Demand Savings } [\Delta kW] = \frac{(W_{base} - W_{post})}{1,000} \times CF_W \times ISR \times IEF_{D,W}$$

**Equation 7**

Where:

- $CF_{SW}$  = Seasonal peak coincidence factor (Table 13)
- $IEF_D$  = Interactive effects factor to account for cooling demand savings or heating demand penalties associated with lighting power reductions (see Table 14)

**Table 13. Specialty LEDs—Coincidence Factors<sup>53</sup>**

Season	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Summer	0.060	0.053	0.063	0.059	0.032
Winter	0.275	0.232	0.199	0.263	0.358

**Table 14. Specialty LEDs—Interactive Effects Factor for Cooling Demand Savings and Heating Demand Penalties<sup>54</sup>**

Heating/cooling type*	IEF <sub>D,S</sub>				
	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Gas heat with AC	1.45	1.33	1.68	1.23	1.44
Gas heat with no AC	1.00	1.00	1.00	1.00	1.00
Heat pump	1.45	1.33	1.68	1.23	1.44
Electric resistance heat with AC	1.45	1.33	1.68	1.23	1.44
Electric resistance heat with no AC	1.00	1.00	1.00	1.00	1.00

<sup>53</sup> See Volume 1

<sup>54</sup> Refer to Table 11.

IEF <sub>D,s</sub>					
Heating/cooling type*	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
No heat with AC	1.45	1.33	1.68	1.23	1.44
Unconditioned space	1.00	1.00	1.00	1.00	1.00
Heating/cooling unknown <sup>55</sup>	1.39	1.28	1.58	1.20	1.38
IEF <sub>D,w</sub>					
Heating/cooling type*	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Gas heat with AC	0.98	0.98	0.98	0.98	0.98
Gas heat with no AC	1.00	1.00	1.00	1.00	1.00
Heat pump	0.71	0.67	0.65	0.74	0.81
Electric resistance heat with AC	0.44	0.36	0.38	0.42	0.52
Electric resistance heat with no AC	0.44	0.36	0.38	0.42	0.52
No heat with AC	0.98	0.98	0.98	0.98	0.98
Unconditioned space	1.00	1.00	1.00	1.00	1.00
Heating/cooling unknown <sup>56</sup>	0.76	0.72	0.73	0.75	0.80

\* IEF for homes with no AC is most appropriate for customers with evaporative cooling or room air conditioners.

<sup>55</sup> Calculated using IEFs from a Cadmus report, weighted using TMY CDD and HDD for Texas, and adjusted to exclude 16 percent outdoor lighting except for upstream defaults. Cadmus report: Cadmus. Entergy Energy-Efficiency Portfolio Evaluation Report 2013 Program Year. Prepared for Entergy Arkansas, Inc. March 14, 2014. Docket No. 07-082-TF.

<sup>56</sup> Calculated using IEFs from Cadmus report, weighted using TMY CDD and HDD for Texas, and adjusted to exclude 16 percent outdoor lighting except for upstream defaults. Cadmus report: Cadmus. Entergy Energy-Efficiency Portfolio Evaluation Report 2013 Program Year. Prepared for Entergy Arkansas, Inc. March 14, 2014. Docket No. 07-082-TF.



### **Upstream/Midstream Program Assumptions**

All general service, decorative, and reflector lamps with an equivalent wattage of 100 W or lower distributed through upstream or midstream programs should calculate savings using a combination of residential and non-residential savings methodologies with 95 percent of savings allocated to the residential sector and the remaining five percent of savings allocated to the commercial sector.<sup>57</sup> While only summer demand savings are specified for the commercial sector, winter demand savings are allowed for the portion of savings allocated to the residential sector.

### **Deemed Energy Savings Tables**

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### **Deemed Summer Demand Savings Tables**

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### **Deemed Winter Demand Savings Tables**

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### **Claimed Peak Demand Savings**

Refer to Volume 1, Section 4 for further details on peak demand savings and methodology.

### **Additional Calculators and Tools**

Not applicable.

### **Measure Life and Lifetime Savings**

Historically, the average measure life is based upon rated lamp life of the LED. The measure life assumes an average use of 2.2 hours per day based on blended usage for indoor/outdoor applications and applies a 0.85 degradation factor to indoor/outdoor LEDs.

$$EUL_{Total} = \frac{Rated\ Life \times DF}{HOU \times 365.25}$$

Equation 8

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<sup>57</sup> Weighting assumptions based on statewide evaluator review of LED purchasing behavior for similar program designs as referenced in the 2018 EM&V upstream lighting memo.

Where:

- Rated Life* = 10,000 hours, 12,000 hours, 15,000 hours, or 20,000 hours, as specified by the manufacturer; if unknown, assume a 10,000-hour lifetime<sup>58</sup>
- DF* = 0.85 degradation factor<sup>59</sup>
- HOU* = 2.2 hours per day<sup>60</sup>

Table 15. Specialty LEDs—Estimated Useful Life

Range of rated measure life (hours)	Assumed rated measure life (hours)	Specialty measure life (years)
≤ 17,500	15,000	16
> 17,500	20,000	20*

\* Measure life capped at 20 years. EUL may be deemed at 16 years in lieu of collecting manufacturer rated life or documenting customer baseline.

## Program Tracking Data and Evaluation Requirements

Primary inputs and contextual data that should be specified and tracked by the program database to inform the evaluation and apply the savings properly are:

- Climate zone or county
- Program delivery type (low-income targeted kits, non-low-income targeted kits, retail, direct install, midstream/upstream)
- LED ANSI C79.1-2002 nomenclature/lamp shape (G, MR16, MRX16, R14)
- LED quantity/Number of LEDs installed
- LED manufacturer and model number
- ~~ANSI C79.1-2002 nomenclature of LED installed (G40, PAR, etc.)~~
- LED ~~B~~baseline and rated wattages of each replacement LED
- LED rated lumens/Lumen output of each replacement LED
- LED rated lifetime (hours)/Manufacturer-rated lifetime of each replacement LED in hours

<sup>58</sup> Minimum lifetime requirement under ENERGY STAR Lamps Specification V2.1, effective January 2, 2017.  
<https://www.energystar.gov/sites/default/files/ENERGY%20STAR%20Lamps%20V2.1%20Final%20Specification.pdf>.

<sup>59</sup> ENERGY STAR CFL Third Party Testing and Verification Off-the-Shelf CFL Performance: Batch 3. Figure 27, p. 47.

<sup>60</sup> The average daily usage of 2.2 hours per day is a blended value for indoor and outdoor lamps. Source: Evaluation of 2008 Texas 'Make Your Mark' Statewide CFL Program Report. Frontier Energy (formerly Associates). June 2009.

- Heating system type (gas, electric resistance, heat pump, none, unknown)
- Cooling system type (air conditioner, evaporative cooler, none, unknown)
- Location of installed lamp (conditioned, unconditioned, or outdoor); only required when not assuming default weighting
- Baseline calculation methodology (EISA-affected non-reflector, EISA-exempt non-reflector, DOE-ruling-affected reflector, DOE-ruling-exempt reflector, manufacturer-rated equivalent incandescent wattage, or default wattage)
- Proof of purchase – with date of purchase and quantity
  - Alternative: representative photos of installed units or other pre-approved method of installation verification
- ENERGY STAR certificate matching replacement model number
  - Alternative: other pre-approved method of certification (e.g., LM-79, LM-80, TM-21, ISTMT lap reports)
- For new construction projects only, these data points must be gathered for all permanently installed fixtures in the home to document the percentage that are high-efficacy.

## **References and Efficiency Standards**

### **Petitions and Rulings**

Not applicable.

### **Relevant Standards and Reference Sources**

Please refer to measure citations for relevant standards and reference sources.

### **Document Revision History**

Table 16. Specialty LEDs—Revision History

TRM version	Date	Description of change
v3.0	4/10/2015	TRM v3.0 origin.
v3.1	11/05/2015	TRM v3.1 update. Modification of in-service rate, revision of interactive effects factors to reflect indoor-specific values for additional heating and cooling equipment types. Consolidated default input assumptions for upstream lighting programs. Capped estimated measure life.
v3.1	3/28/2016	TRM v3.1 March revision. Updated summer and winter coincidence factors.
v4.0	10/10/2016	TRM v4.0 update. Updated IEF values.
v5.0	10/2017	TRM v5.0 update. Updated useful life estimates.

TRM version	Date	Description of change
v6.0	11/2018	TRM v6.0 update. Updated useful life estimates. Updated interactive effects factors.
v7.0	10/2019	TRM v7.0 update. Removed dual baseline and updated useful life estimates. Added invoice and certificate requirements. Added option for new construction savings.
v8.0	10/2020	TRM v8.0 update. Defined midstream methodology and clarified default wattages by lumen range. Updated specialty lamps baselines.
v9.0	10/2021	TRM v9.0 update. Updated midstream methodology and added path for fixtures.
v10.0	10/2022	TRM v10.0 update. Updated for compliance with new DOE GSL definition. Several lamp types previously considered <i>specialty lamps</i> moved to <i>general service lamp</i> measure.
v11.0	10/2023	TRM v11.0 update. Added in-service rates by program type.
<u>v12.0</u>	<u>10/2024</u>	<u>TRM v12.0 update. Clarified federal standard. Updated new construction code high-efficacy lamp requirement.</u>

### 2.1.3 LED Nightlights Measure Overview

**TRM Measure ID:** R-LT-NL

**Market Sector:** Residential

**Measure Category:** Lighting

**Applicable Building Types:** Single-family, multifamily, manufactured

**Fuels Affected:** Electricity

**Decision/Action Type(s):** Retrofit, new construction

**Program Delivery Type(s):** Prescriptive and direct install

**Deemed Savings Type:** Deemed savings calculation

**Savings Methodology:** Engineering algorithms and estimates

#### Measure Description

This measure provides a method for calculating savings for the replacement of an incandescent nightlight with an LED or electroluminescent nightlight.

#### Eligibility Criteria

This measure applies to all LED nightlights installed in a residential application.

#### Baseline Condition

The baseline condition is assumed to be an incandescent/halogen nightlight.

#### High-Efficiency Condition

The high-efficiency condition is a qualified LED nightlight.

#### Energy and Demand Savings Methodology

#### Savings Algorithms and Input Variables

##### **Energy Savings**

Annual energy (kilowatt-hours, kWh) savings are calculated as follows.

$$Energy\ Savings\ [\Delta kWh] = \frac{(W_{base} - W_{post})}{1,000} \times Hours \times ISR \times IEF_E$$

**Equation 9**

Where:

- $W_{base}$  = Baseline wattage. Use actual wattage if known (default = 47 W)<sup>61</sup>
- $W_{post}$  = Actual wattage of LED purchased/installed (default = 1 W for LED)
- $HOU$  = Average hours of use per year = 4,161 hours<sup>62</sup>
- $IEF_E$  = Interactive effects factor to account for cooling energy savings and heating energy penalties associated with lighting power reductions (see Table 17)
- $ISR$  = In-service rate, the percentage of incentivized units that are installed and in use (rather than removed, stored, or burnt out) to account for units incentivized but not operating (see Table 18)
- 1,000 = Constant to convert from W to kW

Table 17. LED Nightlights—Interactive Effects for Cooling Energy Savings and Heating Energy Penalties<sup>63</sup>

Heating/cooling type*	IEF <sub>E</sub>				
	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Gas heat with AC	1.06	1.13	1.17	1.15	1.12
Gas heat with no AC	1.00	1.00	1.00	1.00	1.00
Heat pump	0.91	1.00	1.05	1.11	0.97
Electric resistance heat with AC	0.65	0.80	0.90	1.00	0.75
Electric resistance heat with no AC	0.57	0.69	0.76	0.83	0.65
No heat with AC	1.06	1.13	1.17	1.15	1.12

<sup>61</sup> [Mertz, Stanley. "LED Nightlights Energy Efficiency Retail products programs." March 2018 Based on evaluation of existing retail incandescent night light products.](#)

<sup>62</sup> Southern California Edison Company, "LED, Electroluminescent & Fluorescent Night Lights," Work Paper WPSCREL0029 Rev. 1, February 2009, p. 2 and 3.

<sup>63</sup> Extracted from BEopt energy models used to estimate savings for envelope measures. Referencing the EISA baseline table, the typical lumen output was determined by taking the midpoint for the 60-watt equivalent lamp (900 lm), which was assumed to be the most typical installation. The resulting lumens were divided by the default wattage for incandescents (43 W), CFLs (13 W), and LEDs (10 W) resulting in an assumed efficacy for incandescents (21 lm/W), CFLs (70 lm/W), and LEDs (90 lm/W). IEF values were calculated using the following formula:  $1 + HVAC_{savings}/Lighting_{savings}$ .

IEF <sub>E</sub>					
Heating/cooling type*	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Unconditioned space	1.00	1.00	1.00	1.00	1.00
Heating/cooling unknown <sup>64</sup>	0.88	0.98	1.04	1.07	0.95

\* IEF for homes with no AC is most appropriate for customers with evaporative cooling or room air conditioners.

Table 18. LED Nightlights—In-Service Rates by Program Type

Program type	ISR
Low-income community kits <sup>65</sup>	0.88
All other kit programs <sup>66</sup>	0.60
Retail (time of sale) <sup>67</sup>	0.76
Direct install <sup>68</sup>	0.97

## Demand Savings

Summer and winter demand savings are determined by applying a coincidence factor associated with each season.

$$\text{Summer Peak Demand Savings } [\Delta kW] = \frac{(W_{base} - W_{post})}{1,000} \times CF_S \times ISR \times IEF_{D,S}$$

Equation 10

$$\text{Winter Peak Demand Savings } [\Delta kW] = \frac{(W_{base} - W_{post})}{1,000} \times CF_W \times ISR \times IEF_{D,W}$$

Equation 11

<sup>64</sup> Calculated using IEFs from a Cadmus report, weighted using TMY CDD and HDD for Texas, and adjusted to exclude 16 percent outdoor lighting except for upstream defaults. Cadmus report: Cadmus. Entergy Energy-Efficiency Portfolio Evaluation Report 2013 Program Year. Prepared for Entergy Arkansas, Inc. March 14, 2014. Docket No. 07-082-TF.

<sup>65</sup> Kits targeting low-income qualified communities. From Illinois TRM v10, based on 2018 Ameren Illinois income-qualified participant survey. Representative of first-year installations.

<sup>66</sup> From Illinois TRM v10 based on evaluation of ComEd PY9 Elementary Energy Education program. Representative of first-year installations.

<sup>67</sup> From Illinois TRM v10 based on evaluations of ComEd PY8, PY9, and CY2018 and Ameren PY8 programs. Representative of first-year installations.

<sup>68</sup> Dimetrosky, S., Parkinson, K. and Lieb, N. "Residential Lighting Evaluation Protocol – The Uniform Methods Project: Methods for Determining Energy Efficiency Savings for Specific Measures." January 2015. ISR for upstream programs, including storage lamps installed within four years of purchase. <http://energy.gov/sites/prod/files/2015/02/f19/UMPCChapter21-residential-lighting-evaluation-protocol.pdf>.

Where:

$CF_{SW}$  = Seasonal peak coincidence factor (see Table 19)

$IEF_D$  = Interactive effects factor to account for cooling demand savings or heating demand penalties associated with lighting power reductions (see Table 20)

**Table 19. LED Nightlights—Coincidence Factors<sup>69</sup>**

Season	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Summer	0.00	0.00	0.00	0.00	0.00
Winter	0.67	0.71	0.61	0.75	1.00

**Table 20. LED Nightlights—Interactive Effects Factor for Cooling Demand Savings and Heating Demand Penalties<sup>70</sup>**

IEF <sub>D,s</sub>					
Heating/cooling type*	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Gas heat with AC	1.45	1.33	1.68	1.23	1.44
Gas heat with no AC	1.00	1.00	1.00	1.00	1.00
Heat pump	1.45	1.33	1.68	1.23	1.44
Electric resistance heat with AC	1.45	1.33	1.68	1.23	1.44
Electric resistance heat with no AC	1.00	1.00	1.00	1.00	1.00
No heat with AC	1.45	1.33	1.68	1.23	1.44
Unconditioned space	1.00	1.00	1.00	1.00	1.00
Heating/cooling unknown <sup>71</sup>	1.39	1.28	1.58	1.20	1.38

<sup>69</sup> From TX TRM *commercial lamps & fixtures* measure for dusk-to-dawn operation.

<sup>70</sup> Refer to Table 20.

<sup>71</sup> Ibid.



IEF <sub>D,W</sub>					
Heating/cooling type*	Climate Zone 1: Amarillo	Climate Zone 2: Dallas	Climate Zone 3: Houston	Climate Zone 4: Corpus Christi	Climate Zone 5: El Paso
Gas heat with AC	0.98	0.98	0.98	0.98	0.98
Gas heat with no AC	1.00	1.00	1.00	1.00	1.00
Heat pump	0.71	0.67	0.65	0.74	0.81
Electric resistance heat with AC	0.44	0.36	0.38	0.42	0.52
Electric resistance heat with no AC	0.44	0.36	0.38	0.42	0.52
No heat with AC	0.98	0.98	0.98	0.98	0.98
Unconditioned space	1.00	1.00	1.00	1.00	1.00
Heating/cooling unknown <sup>72</sup>	0.76	0.72	0.73	0.75	0.80

\* IEF for homes with no AC is most appropriate for customers with evaporative cooling or room air conditioners.

### **Upstream/Midstream Program Assumptions**

All general service lamps with an equivalent wattage of 100 W or lower distributed through upstream or midstream programs should calculate savings using a combination of residential and non-residential savings methodologies with 95 percent of savings allocated to the residential sector and the remaining 5 percent of savings allocated to the commercial sector.<sup>73</sup> While only summer demand savings are specified for the commercial sector, winter demand savings are allowed for the portion of savings allocated to the residential sector.

### **Deemed Energy Savings Tables**

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### **Deemed Summer Demand Savings Tables**

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### **Deemed Winter Demand Savings Tables**

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

<sup>72</sup> Ibid.

<sup>73</sup> Weighting assumptions based on statewide evaluator review of LED purchasing behavior for similar program designs as referenced in the 2018 EM&V upstream lighting memo.

## **Additional Calculators and Tools**

Not applicable.

## **Measure Life and Lifetime Savings**

The estimated useful life (EUL) for LED nightlights is 8 years.<sup>74</sup>

## **Program Tracking Data and Evaluation Requirements**

Primary inputs and contextual data that should be specified and tracked by the program database to inform the evaluation and apply the savings properly are:

- Climate zone or county
- Program delivery type (low-income targeted kits, non-low-income targeted kits, retail, direct install)
- LED nightlight quantity ~~Number of LED nightlights installed~~
- LED nightlight manufacturer and model number
- LED nightlight wattage
- Heating system type (gas, electric resistance, heat pump, none, unknown)
- Cooling system type (air conditioner, evaporative, none, unknown)
- Proof of purchase – with date of purchase and quantity
  - Alternative: representative photos of replacement units or another pre-approved method of installation verification

## **References and Efficiency Standards**

Not applicable.

## **Petitions and Rulings**

Not applicable.

## **Relevant Standards and Reference Sources**

Please refer to measure citations for relevant standards and reference sources.

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<sup>74</sup> Southern California Edison Company, "LED, Electroluminescent & Fluorescent Night Lights," Work Paper WPSCRELG0029 Rev. 1, February 2009, p. 2 and 3.

## Document Revision History

Table 21. LED Nightlights—Revision History

TRM version	Date	Description of change
v10.0	10/2022	TRM v10.0 origin.
v11.0	10/2023	TRM v11.0 update. Added in-service rates by program type.
v12.0	10/2024	<u>TRM v12.0 update. Updated baseline wattage assumption and documentation requirements.</u>

## 2.2 RESIDENTIAL: HEATING, VENTILATION, AND AIR CONDITIONING

### 2.2.1 Air Conditioner and Heat Pump Tune-Ups Measure Overview

**TRM Measure ID:** R-HV-TU

**Market Sector:** Residential

**Measure Category:** HVAC

**Applicable Building Types:** Single-family, multifamily, manufactured

**Fuels Affected:** Electricity

**Decision/Action Type(s):** Retrofit

**Program Delivery Type(s):** Prescriptive

**Deemed Savings Type:** Deemed savings calculation

**Savings Methodology:** Engineering algorithms and estimates

### Measure Description

This measure applies to central air conditioners (AC) and heat pumps (HP) of any configuration where all applicable actions from the checklist below are completed. An AC tune-up involves checking, cleaning, adjusting, and resetting the equipment to factory conditions to restore operating efficiencies, on average, closer to as-new performance. This measure applies to all residential applications.

For this measure, the service technician must complete the following tasks according to industry best practices. To properly assess and adjust the refrigerant charge level, the unit must be operating under significant (normal) cooling load conditions. Therefore, this measure may only be performed for energy savings reporting purposes when the outdoor ambient dry bulb temperature is above 75°F, and the indoor return air dry bulb temperature is above 70°F.

HVAC Air conditioner inspection and tune-up checklist:<sup>75</sup>

- Check thermostat settings
- Tighten all electrical connections, measure motor voltage and current
- Lubricate all moving parts, including motor and fan bearings
- Inspect and clean the condensate drain
- Inspect controls of the system to ensure proper and safe operation. Check the startup/shutdown cycle of the equipment to assure the system starts, operates, and shuts off properly.

<sup>75</sup> Based on ENERGY STAR HVAC Maintenance Checklist.  
[www.energystar.gov/index.cfm?c=heat\\_cool\\_pr\\_maintenance](https://www.energystar.gov/index.cfm?c=heat_cool_pr_maintenance)<https://www.energystar.gov/saveathome/heat-ing-cooling/maintenance-checklist>.

- Clean evaporator and condenser coils
- Check refrigerant level and adjust to manufacturer specifications
- Clean indoor blower fan components and adjust to provide proper system airflow
- Inspect and clean or change air filters; replacement preferred best practice
- Measure airflow via static pressure across the cooling coil and adjust to manufacturers specifications
- ~~Check refrigerant level and adjust to manufacturer specifications~~
- Check capacitor functionality and capacitance; compare to OEM specifications

## Eligibility Criteria

HVAC systems must be manufactured before January 1, 2023, to be eligible for this measure.<sup>76</sup> All residential customers are eligible for this measure if they have refrigerated air conditioning 65,000 Btu/hr or less in cooling capacity that has not been serviced through a utility program in the last five years.

This measure is also applicable to packaged terminal air conditioners and heat pumps (PTAC/PTHPs).

## Baseline Condition

The baseline is a system with some or all of the following issues:

- Dirty condenser coil
- Dirty evaporator coil
- Dirty blower wheel
- Dirty filter
- Improper airflow
- Incorrect refrigerant charge

The baseline system efficiency should be calculated using the following formulas:

$$EER_{pre} = (1 - EL) \times EER_{post}$$

Equation 12

$$HSPF_{pre} = (1 - EL) \times HSPF_{post}$$

Equation 13

<sup>76</sup> The current federal standard became effective on January 1, 2023, with full manufacturing compliance of the new SEER2 testing procedure being enforced as of April 24, 2023. This measure will be updated in the future to address the new efficiency ratings. <https://www.regulations.gov/document/EERE-2021-BT-TP-0030-0027>.

Where:

$EER_{pre}$	=	Efficiency of the cooling equipment before tune-up
$EL$	=	Efficiency loss due to dirty coils, blower, filter, improper airflow, and/or incorrect refrigerant charge = 0.05
$EER_{post}$	=	Deemed cooling efficiency of the equipment after tune-up = 11.2 EER
$HSPF_{pre}$	=	Heating efficiency of the air source heat pump before tune-up
$HSPF_{post}$	=	Deemed heating efficiency of air source heat pumps after tune-up = 7.7 HSPF

## High-Efficiency Condition

After the tune-up, the equipment must be clean with airflows and refrigerant charges adjusted as appropriate and set forth above, with the added specification that refrigerant charge adjustments must be within  $\pm 3$  degrees of target sub-cooling for units with thermal expansion valves (TXV) and  $\pm 5$  degrees of target super heat for units with fixed orifices or capillary tubes.

The efficiency standard, or efficiency after the tune-up, is deemed to be the manufacturer specified energy efficiency ratio (EER) of the existing central air conditioner or heat pump, which has been determined using the following logic and standards. The useful life of an AC unit is 19 years. The useful life of a heat pump is 16 years. Therefore, it is conservatively thought that the majority of existing, functioning units were installed under the federal standard in place between January 23, 2006, and January 1, 2015, which set a baseline of 13 SEER and 7.7 HSPF<sup>77</sup>. A 13 SEER is equivalent to approximately 11.2 EER<sup>78</sup> using the conversion developed by Lawrence Berkeley Lab and US DOE:  $EER = -0.02 \times SEER^2 + 1.12 \times SEER$ .

## Energy and Demand Savings Methodology

### Savings Algorithms and Input Variables

Savings are based on an assumed efficiency loss factor of 5 percent due to dirty coils, dirty filters, improper airflow, and/or incorrect refrigerant charge.<sup>79</sup>

<sup>77</sup> Code specified HSPF from federal standard effective January 23, 2006 through January 1, 2015.

<sup>78</sup> Code specified 13 SEER from federal standard effective January 23, 2006 through January 1, 2015, converted to EER using  $EER = -0.02 \times SEER^2 + 1.12 \times SEER$ . National Renewable Energy Laboratory (NREL). "Building America House Simulation Protocols." US Department of Energy. Revised October 2010. <http://www.nrel.gov/docs/fy11osti/49246.pdf>.

<sup>79</sup> Energy Center of Wisconsin, May 2008; "Central Air Conditioning in Wisconsin, A Compilation of Recent Field Research."

## Energy Savings Algorithms

Heating energy savings are only applicable to heat pumps.

$$\text{Total Energy Savings } [\Delta kWh] = kWh_C + kWh_H \quad \text{Equation 14}$$

$$\text{Cooling Energy Savings } [kWh_C] = Cap_C \times \left( \frac{1}{EER_{pre}} - \frac{1}{EER_{post}} \right) \times EFLH_C \times \frac{1 \text{ kW}}{1,000 \text{ W}} \quad \text{Equation 15}$$

$$\text{Heating Energy Savings } [kWh_H] = Cap_H \times \left( \frac{1}{HSPF_{pre}} - \frac{1}{HSPF_{post}} \right) \times EFLH_H \times \frac{1 \text{ kW}}{1,000 \text{ W}} \quad \text{Equation 16}$$

Where:

- $Cap_C$  = Rated cooling capacity of the equipment based on model number [Btuh] (1 ton = 12,000 Btuh)
- $Cap_H$  = Rated heating capacity of the equipment based on model number [Btuh] (1 ton = 12,000 Btuh)
- $EER_{pre}$  = Cooling efficiency of the equipment pre-tune-up using Equation 12 [Btuh/W]
- $EER_{post}$  = Cooling efficiency of the equipment after the tune-up [Btuh/W]; assume 11.2
- $HSPF_{pre}$  = Heating efficiency of the equipment pre-tune-up using Equation 13 [Btuh/W]
- $HSPF_{post}$  = Heating efficiency of the equipment after the tune-up [Btuh/W]; assume 7.7
- $EFLH_{C,H}$  = Cooling/heating equivalent full-load hours for appropriate climate zone [hours]

Table 22. AC/HP Tune-Ups—Equivalent Full Load Cooling/Heating Hours<sup>80</sup>

Climate zone	EFLH <sub>C</sub>	EFLH <sub>H</sub>
Zone 1: Amarillo	1,142	1,880
Zone 2: Dallas	1,926	1,343
Zone 3: Houston	2,209	1,127

<sup>80</sup> ENERGY STAR Central AC/HP Savings Calculator. April 2009 update.  
[https://www.energystar.gov/sites/default/files/asset/document/ASH\\_P\\_Sav\\_Calc.xls](https://www.energystar.gov/sites/default/files/asset/document/ASH_P_Sav_Calc.xls).

Climate zone:	EFLH <sub>C</sub>	EFLH <sub>H</sub>
Zone 4: Corpus Christi	2,958	776
Zone 5: El Paso	1,524	1,559

### Demand Savings Algorithms

$$\text{Summer Peak Demand Savings } [\Delta kW] = Cap_C \times \left( \frac{1}{EER_{pre}} - \frac{1}{EER_{post}} \right) \times CF_S \times \frac{1 kW}{1,000 W}$$

Equation 17

$$\text{Winter Peak Demand Savings } [\Delta kW] = Cap_H \times \left( \frac{1}{HSPF_{pre}} - \frac{1}{HSPF_{post}} \right) \times CF_W \times \frac{1 kW}{1,000 W}$$

Equation 18

Summer and winter demand savings are determined by applying a coincidence factor for each season. Winter peak demand savings are only applicable to heat pumps.

Where:

$$CF_{SW} = \text{Summer/winter peak coincidence factor (see Table 23)}$$

Table 23. AC/HP Tune-Ups—Coincidence Factors<sup>81</sup>

Season	CF
Summer <sup>82</sup>	0.87
Winter <sup>83</sup>	0.83

### Deemed Energy Savings Tables

Applying the above algorithms results in the deemed energy savings per ton in Table 24. Heating savings are only applicable for heat pumps.

<sup>81</sup> Coincidence factors calculated in accordance with the current peak definition are lower than expected for the Texas climate. Residential HVAC measures will temporarily revert to the coincidence factors used in TX TRM v4.0 before the change to the peak definition. These values will be reevaluated in upcoming TRM cycles to better align with the current peak definition.

<sup>82</sup> Air Conditioning Contractors of America (ACCA) Manual S recommends that residential heat pumps be sized at 115 percent of the maximum cooling requirement of the residence (for cooling-dominated climates). Assuming that maximum cooling occurs during the peak period, the guideline leads to a coincidence factor of  $1 / 1.15 = 0.87$ .

<sup>83</sup> ACCA Manual S recommends that residential heat pumps be sized at 115 percent of the maximum cooling requirement of the residence (for cooling dominated climates). Based on AHRI data for 1.5–5 ton HVAC systems, the average ratio of rated heating capacity to cooling capacity is 0.96. Assuming that maximum heating occurs during the peak period and adjusting for the average ratio of heating-to-cooling capacity, the guideline leads to a coincidence factor of  $0.96 / 1.15 = 0.83$ .



**Table 24. AC/HP Tune-Ups—Energy Savings (kWh/ton)**

Climate zone	Cooling (kWh/ton)	Heating (kWh/ton)
Zone 1: Amarillo	64.4	154.2
Zone 2: Dallas	108.6	110.2
Zone 3: Houston	124.6	92.4
Zone 4: Corpus Christi	166.8	63.7
Zone 5: El Paso	85.9	127.9

### Deemed Summer Demand Savings Tables

Applying the above algorithms results in the deemed summer demand savings per ton in Table 25.

**Table 25. AC/HP Tune-Ups—Summer Peak Demand Savings (kW/ton)**

Climate zone	Summer kW/ton
Zone 1: Amarillo	0.049
Zone 2: Dallas	
Zone 3: Houston	
Zone 4: Corpus Christi	
Zone 5: El Paso	

### Deemed Winter Demand Savings Tables

Applying the above algorithms results in the deemed winter demand savings per ton in Table 26. Winter peak demand savings are only applicable for heat pumps.

**Table 26. AC/HP Tune-Ups—Peak Demand Savings (kW/ton)**

Climate zone	Winter kW/ton
Zone 1: Amarillo	0.068
Zone 2: Dallas	
Zone 3: Houston	
Zone 4: Corpus Christi	
Zone 5: El Paso	

### Claimed Peak Demand Savings

Refer to Volume 1, Section 4 for further details on peak demand savings and methodology.

## Additional Calculators and Tools

Not applicable.

## Measure Life and Lifetime Savings

The estimated useful life (EUL) for a tune-up is five years.<sup>84</sup>

### Program Tracking Data and Evaluation Requirements

Primary inputs and contextual data that should be specified and tracked by the program database to inform the evaluation and apply the savings properly are:

- Most recent tune-up service date or confirmation that system has not been serviced within the previous five years
- Climate zone or county
- Equipment type (split AC, split HP, packaged AC, packaged HP, PTAC, PTHP)
- Manufacturer, model number, and serial number
- Cooling and heating capacity of the serviced unit (tons)
- Heating capacity of the serviced unit if applicable (tons)
- Before and after tune-up pictures of components illustrating condition change due to cleanings (Note: pictures that include well-placed familiar objects like hand tools often provide a sense of scale and a reference for color/shading comparisons. Pictures of equipment name plates are useful).
- Recommended:
  - Serial number
  - Refrigerant type
  - Amount of refrigerant added or removed
  - Target superheat or subcooling
  - Post tune-up superheat or subcooling
  - ~~○ Amount of refrigerant added or removed~~
  - Static pressures before and after tune-up
  - Return and supply dry bulb and wet bulb temperatures
  - ~~○ Before and after tune-up pictures of components illustrating condition change due to cleanings (Note: pictures that include well-placed familiar objects like hand tools often provide a sense of scale and a reference for~~

<sup>84</sup> GDS Associates, Inc. (2007). Measure Life Report: Residential and Commercial/Industrial Lighting and HVAC Measures. Prepared for The New England State Program Working Group; Page 1-3, Table 1. [https://library.cee1.org/sites/default/files/library/8842/CEE\\_Eval\\_MeasureLifeStudyLights&HVACGDS\\_1Jun2007.pdf](https://library.cee1.org/sites/default/files/library/8842/CEE_Eval_MeasureLifeStudyLights&HVACGDS_1Jun2007.pdf).

color/shading comparisons. Pictures of equipment name plates are useful).

## **References and Efficiency Standards**

### **Petitions and Rulings**

Not applicable.

### **Relevant Standards and Reference Sources**

Please refer to measure citations for relevant standards and reference sources.

## **Document Revision History**

Table 27. AC/HP Tune-Ups—History

<b>TRM version</b>	<b>Date</b>	<b>Description of change</b>
v4.0	10/10/2015	TRM v4.0 origin.
v5.0	10/2017	TRM v5.0 update. No revision.
v6.0	11/2018	TRM v6.0 update. No revision.
v7.0	10/2019	TRM v7.0 update. No revision.
v8.0	10/2020	TRM v8.0 update. Updated coincidence factors.
v9.0	10/2021	TRM v9.0 update. Updated EUL reference.
v10.0	10/2022	TRM v10.0 update. Updated coincidence factors.
v11.0	10/2023	TRM v11.0 update. Updated demand savings. Clarified eligibility for PTACs and PTHPs.
<u>v12.0</u>	<u>10/2024</u>	<u>TRM v12.0 update. Updated tune-up checklist to match ENERGY STAR HVAC Maintenance Checklist.</u>

## 2.2.2 Central and Mini-Split Air Conditioners and Heat Pumps Measure Overview

**TRM Measure ID:** R-HV-CM

**Market Sector:** Residential

**Measure Category:** HVAC

**Applicable Building Types:** Single-family, multifamily, manufactured

**Fuels Affected:** Electricity

**Decision/Action Type(s):** Replace-on-burnout, early retirement, new construction

**Program Delivery Type(s):** Prescriptive

**Deemed Savings Type:** Deemed savings calculation

**Savings Methodology:** Engineering algorithms and estimates

### Measure Description

Residential replacement of existing heating and cooling equipment with a new central or mini-split air-source air conditioner (AC) or heat pump (HP) in an existing building, or the installation of a new central AC or HP in a new residential construction. Downsized systems that are rightsized per heat-load calculation are also eligible. A new central system includes an entire packaged unit or a split system consisting of an indoor unit with a matching remote condensing unit. This measure also applies to the installation of dual-fuel HPs and DC inverter systems that meet all existing measure eligibility criteria.

Additional savings may be available for duct removal in combination with the installation of a ductless mini-split. In these cases, refer to the *duct sealing* measure and follow the savings methodology (standard approach) using a value of 0 cubic feet per minute (CFM) as the post-improvement duct leakage. Leakage testing must be performed on the existing ductwork to claim savings for duct removal.

### Eligibility Criteria

The deemed savings apply to units with a capacity of  $\leq 65,000$  Btu/hour (5.4 tons).

Equipment shall be properly sized to the dwelling based on ASHRAE or ACCA Manual J standards. Manufacturer datasheets for installed equipment or documentation of AHRI or DOE CCMS certification must be provided.<sup>85,86</sup> Savings should be calculated using rated capacities whenever possible. Reported system capacities and efficiencies should always match those verified by AHRI or DOE as tested under AHRI operating conditions for a specific combination

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<sup>85</sup> Air-Conditioning, Heating, and Refrigeration Institute (AHRI) Directory: <https://www.ahridirectory.org/>.

<sup>86</sup> Department of Energy Compliance Certification Management System (DOE CCMS): <https://www.regulations.doe.gov/certification-data/>.

of equipment, including condenser, coil, and furnace (or condenser only for packaged units). Savings should never be calculated using efficiency ratings for individual system components.

Customers should be advised against using the emergency heat (EM HEAT) setting on heat pump thermostats. This setting is meant only for use in emergency situations when the heat pump is damaged or malfunctioning. Supplemental heating automatically kicks on in below-freezing conditions using the regular HEAT setting. Contractors installing a new heat pump thermostat with equipment install shall advise the customer of correct thermostat usage.

For early retirement projects, to receive savings, the unit to be replaced must be functioning at the time of removal with a maximum age of 24 years for ACs and 20 years for HPs. Otherwise, claim savings for a replace-on-burnout project. Additional guidance for systems applying the default age is provided in the Savings Algorithms and Input Variables section.

The replacement of an evaporative cooler with a refrigerated system is eligible where the decision to change equipment types predates or is independent of the decision to install efficient equipment and should be claimed against the new construction baseline.

The replacement of a room AC with a central or mini-split AC or HP is eligible and should be claimed against the new construction baseline. Refer to the Replace-on-Burnout or Early Retirement of an Electric Resistance Furnace section for guidance about the appropriate heating baseline for residences with electric resistance heat. Under this scenario, no savings should be awarded for rightsizing.

System rightsizing refers to installing an HVAC system that has been sized in accordance with a load calculation, such as a Manual J, considering specific home characteristics. Rightsizing retrofit projects could include upsizing or downsizing by one-half ton or more from the existing system. New construction projects are not eligible to receive deemed savings for system rightsizing.<sup>87</sup>

For system downsizing, savings may be claimed against the applicable replace-on-burnout or early retirement scenario using the existing higher system pre-capacity with the lower system post-capacity if a Manual J load calculation is completed and included with project documentation.

For system upsizing, savings should generally be claimed against the new construction baseline. However, optional rightsizing savings are available for upsizing up to one ton for the scenarios outlined below. In these cases, savings may be claimed against the applicable replace-on-burnout or early retirement scenario if the specified conditions are met. For these scenarios, savings must be determined using the lower pre-tonnage. These exceptions should be applied consistently at the program level for the duration of the program year.

- Replacing a single larger capacity system with multiple smaller capacity systems.<sup>88</sup> If the multiple installed units do not share the same efficiency value, savings should be determined using the most conservative efficiency value.

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<sup>87</sup> For projects using a custom baseline, see TRM Volume 4.

<sup>88</sup> This exception is allowed to account for efficiency improvements due to zoning that are not reflected in the current savings methodology.

- Replacing a single-stage system with a variable-speed system.<sup>89</sup> This scenario only applies to the replacement of a single-stage system.
- If a Manual J load calculation is completed and included with project documentation.<sup>90</sup>

Additionally, low-income or hard-to-reach programs may use the electric resistance baseline for the following two scenarios:

- The electric resistance baseline may be used for systems upsized by no more than a half-ton in lieu of the new construction baseline. Under this scenario, cooling savings should be claimed against the new construction baseline using the installed (higher) capacity. Heating savings should be claimed against the electric resistance baseline using the existing (lower) capacity. Documentation should be aligned with the rightsizing and electric resistance baseline requirements outlined in this measure.
- The second scenario is for a major multifamily renovation when a centralized system, such as a boiler, is replaced with individual heat pumps. For this scenario, the electric resistance baseline may be claimed in lieu of new construction only if the building owner can document intent to install electric-resistance furnaces without program intervention. The cooling savings should still be claimed against the new construction baseline. Documentation should follow early retirement and electric-resistance baseline requirements.

When replacing a single unit with multiple units where the capacity is the same or has been downsized, savings should be calculated using the total system pre- and post-capacity. Again, if the multiple installed units do not share the same efficiency value, savings should be looked up using the most conservative efficiency value.

## Baseline Condition

### ***New Construction, Replace-on-Burnout, or Early Retirement of an Air-Source AC or HP***

New construction baseline efficiency values for ACs or HPs are compliant with the current federal standard,<sup>91,92</sup> effective January 1, 2023. The baseline is assumed to be a new system with an AHRI-listed SEER2 rating consistent with the values listed in Table 28 and Table 29. These baselines are also applicable to central ACs with gas, electric resistance, or unknown heating replacing an HP; evaporative coolers with central, space, or no heating; and room/window ACs with central, space, or no heating.

<sup>89</sup> This exception is allowed to account for efficiency improvements due to operating at variable speeds that are not reflected in the current savings methodology.

<sup>90</sup> This exception is allowed to account for efficiency improvements due to replacing a unit that was operating longer than designed to keep up with actual site load conditions.

<sup>91</sup> DOE minimum efficiency standard for residential air conditioners/heat pumps.  
[https://www1.eere.energy.gov/buildings/appliance\\_standards/standards.aspx?productid=48&action=viewlive](https://www1.eere.energy.gov/buildings/appliance_standards/standards.aspx?productid=48&action=viewlive).

<sup>92</sup> Walter-Terrinoni, Helen, "New US Energy Efficiency Standards and Refrigerants for Residential ACs and Heat Pumps." Air-Conditioning, Heating, & Refrigeration Institute (AHRI). February 1, 2022.

For replace-on-burnout projects, the cooling baselines are reduced by 4.3 percent. This value is based on Energy Systems Laboratory (ESL) survey data and incorporates an adjustment to the baseline SEER2/EER2 value to reflect the percentage of current replacements that do not include the installation of an AHRI-matched system.<sup>93,94</sup> Heating baselines were not included in original ESL survey data and are not adjusted.

For early retirement projects, baselines are defined in Table 28 and Table 29 based on the applicable federal standard base on manufacture year. These baselines have been converted to SEER2, EER2, and HSPF2 by extrapolating from known values referenced in the current federal standard. Systems manufactured as of January 1, 2023, are not eligible for early retirement.

For early retirement projects involving an HP replacing an AC with gas heat, early retirement cooling baselines should be used in combination with new construction heating baselines.

For all systems with a part-load efficiency rating of 15.2 SEER2 or higher, the full-load efficiency baseline is reduced to 9.8 EER2, consistent with the EER2 federal standard specified for the Southwest region. While this standard does not directly apply to Texas, it is used here to recognize a reduced full-load allowance for systems achieving higher part-load efficiency ratings. This value is not reduced based on ESL survey data. Where applicable, the reduced 9.8 EER2 baseline should be applied in lieu of the EER2 baseline value presented in Table 28 and Table 29 except where the specified baseline EER2 value is lower than 9.8 EER2.

### **Replace-on-Burnout or Early Retirement of an Electric Resistance Furnace**

Electric resistance heating baselines may refer to residences heated by a centralized forced-air furnace or by individual space heaters.<sup>95</sup> Space heating primarily refers to electric baseboard zonal heaters controlled by thermostats or to portable plug-load heaters.<sup>96</sup> Electric resistance heat controlled by a wall thermostat is eligible to claim the deemed savings presented in this measure. Homes with portable space heaters should calculate savings using a HP baseline.

By the nature of the technology, all electric resistance furnaces have the same efficiency with HSPF = 3.412.<sup>97</sup> Projects in which an electric resistance furnace is replaced, either in replace-on-burnout or early retirement scenarios, use this baseline for heating-side savings.

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<sup>93</sup> Frontier Energy on behalf of the Electric Utility Marketing Managers of Texas (EUMMOT). "Petition to revise Existing Commission-Approved Deemed Savings Values for Central Air Conditioning and Heat Pump Systems: Docket No. 36780." Public Utility Commission of Texas. Approved August 27, 2009. <https://interchange.puc.texas.gov/>. Adapted for new 14 SEER baseline.

<sup>94</sup> The original petition defines the reduced baseline as 12.44 SEER compared to a 13 SEER federal standard. This deemed value was converted to a percentage reduction to accommodate a transition from SEER to SEER2. No EER adjustment is discussed in the original petition because the previous deemed savings structure only awarded savings based on SEER ratings. However, supporting documentation of the original filing makes it clear that the adjustment is appropriate for both part- and full-load cooling efficiency values. Therefore, the deemed percentage reduction is applied to both SEER2 and EER2 ROB baselines.

<sup>95</sup> Electric Resistance Heating: <https://www.energy.gov/energysaver/home-heating-systems/electric-resistance-heating>.

<sup>96</sup> Portable Heaters: <https://www.energy.gov/energysaver/home-heating-systems/portable-heaters>.

<sup>97</sup> COP = HSPF × 1,055 J/BTU / 3,600 J/W-hr. For Electric Resistance, heating efficiency is 1 COP. Therefore, HSPF = 1 × 3,600 / 1,055 = 3.412.

**Table 28. Central and Mini-Split ACs—Baseline Efficiencies**

Project type	Capacity (Btu/hr)	Cooling mode
New construction, split air conditioners	< 45,000	14.3 SEER2 11.7 EER2
	≥ 45,000	13.8 SEER2 11.2 EER2
New construction, packaged air conditioners	All	13.4 SEER2 10.9 EER2
Replace-on-burnout, split air conditioners	< 45,000	13.7 SEER2 11.2 EER2
	≥ 45,000	13.2 SEER2 10.7 EER2
Replace-on-burnout, packaged air conditioners	All	12.8 SEER2 10.4 EER2
Early retirement, air conditioners (manufactured 1/1/2015 through 12/31/2022)	All	12.8 SEER2 10.4 EER2
Early retirement, air conditioners (when applying default age) <sup>98</sup>	All	12.3 SEER2 10.0 EER2
Early retirement, air conditioners (manufactured 1/23/2006 through 12/31/2014)	All	11.9 SEER2 9.7 EER2
Early retirement, air conditioners (manufactured before 1/23/2006)	All	9.1 SEER2 7.4 EER2
All systems rated at 15.2 SEER2 or higher <sup>99</sup>	All	9.8 EER2

**Table 29. Central and Mini-Split HPs—Baseline Efficiencies**

Project type	Cooling mode	Heating mode
New construction, split heat pumps	14.3 SEER2	7.5 HSPF2
	11.7 EER2	
New construction, packaged heat pumps	13.4 SEER2	6.7 HSPF2
	10.9 EER2	
Replace-on-burnout, split heat pumps	13.7 SEER2	7.5 HSPF2
	11.2 EER2	
Replace-on-burnout, packaged heat pumps	12.8 SEER2	6.7 HSPF2
	10.4 EER2	

<sup>98</sup> Baseline efficiencies are calculated by taking the average the early retirement categories for 2006-2014 and 2015-2022.

<sup>99</sup> When installing any system with a part-load efficiency rating of 15.2 SEER2 or higher, the reduced 9.8 EER2 full-load efficiency baseline should be applied in lieu of the applicable value presented earlier in the table except where the specified baseline EER2 value is lower than 9.8 EER2.



Project type	Cooling mode	Heating mode
Early retirement, split heat pumps (manufactured 1/1/2015 through 12/31/2022)	12.8 SEER2 10.4 EER2	6.9 HSPF2
Early retirement, packaged heat pumps (manufactured 1/1/2015 through 12/31/2022)	12.8 SEER2 10.4 EER2	6.7 HSPF2
Early retirement, split heat pumps (when applying default age) <sup>100</sup>	12.3 SEER2 10.0 EER2	6.7 HSPF2
Early retirement, packaged heat pumps (when applying default age) <sup>101</sup>	12.3 SEER2 10.0 EER2	6.6 HSPF2
Early retirement, heat pumps (manufactured 1/23/2006 through 12/31/2014)	11.9 SEER2 9.7 EER2	6.5 HSPF2
Early retirement, heat pumps (manufactured before 1/23/2006)	9.1 SEER2 7.4 EER2	5.7 HSPF2
All systems rated at 15.2 SEER2 or higher <sup>102</sup>	9.8 EER2	–
Replace-on-burnout or early retirement, electric resistance furnace <sup>103</sup>	–	3.412 HSPF2

## High-Efficiency Condition

Rated system cooling (SEER2) and heating (HSPF2) efficiencies must meet or exceed the federal standard specified in Table 28 and Table 29. HVAC equipment with SEER2 meeting federal standard minimum requirements is eligible for early retirement cooling savings with verification of age of existing equipment and removal of functional inefficient equipment. HPs with HSPF2 meeting the minimum federal standard replacing electric resistance furnaces should follow the electric resistance documentation requirements.

Since there is no full-load efficiency requirement specified in the current federal standard, systems that comply with SEER2 and HSPF2 requirements but do not comply with the EER2 requirements outlined in Table 28 and Table 29 may still be eligible to claim savings. Systems with qualifying SEER2 and HSPF2 energy ratings are permitted to claim cooling energy savings, heating energy savings, and winter demand savings for systems, but not summer demand savings where the EER2 rating does not comply with the minimum requirement.

<sup>100</sup> Baseline efficiencies are calculated by taking the average the early retirement categories for 2006–2014 and 2015–2022.

<sup>101</sup> Ibid.

<sup>102</sup> When installing any system with a part-load efficiency rating of 15.2 SEER2 or higher, the reduced 9.8 EER2 full-load efficiency baseline should be applied in lieu of the applicable value presented earlier in the table except where the specified baseline EER2 value is lower than 9.8 EER2.

<sup>103</sup> When installing a heat pump replacing a split air conditioner with an electric resistance furnace, the reduced 3.412 HSPF2 heating baseline efficiency should be applied in lieu of the applicable value presented earlier in the table.

Split system efficiencies are driven primarily by the efficiency of the condenser unit. If the paired outdoor and indoor units are not listed on the AHRI certification listing and only provide DOE CCMS testing results, then the capacity and efficiency of the high-efficiency condition shall not exceed the average of the AHRI certification listing pairing for the matching condenser. The DOE CCMS listing provides documentation of the results that are on the AHRI certification listing and can be downloaded and filtered based on listing using a similar condenser and various indoor units.

## **Energy and Demand Savings Methodology**

### **Savings Algorithms and Input Variables**

Energy and demand savings algorithms and associated input variables are listed below.

For early retirement or rightsizing projects, attempt to determine the rated capacity of the existing unit. The rated capacity may be found on the manufacturer specification sheet for the existing unit if the new system is not available on the AHRI or DOE CCMS directories. If the model number of the existing unit is unobtainable or if the manufacturer specification sheet cannot be found, use nominal tonnage for both the existing and new unit. Never use nominal tonnage for the existing unit in combination with rated tonnage for the new unit, which can lead to overstated savings. Additionally, never use nominal tonnage to determine savings for projects where no early retirement or rightsizing has occurred.

For early retirement, if age is unknown, assume a default age equal to the replaced unit estimated useful life (EUL) resulting in a remaining useful life (RUL) of 7 (ACs) or 6 years (HPs)<sup>104</sup>. Default age may be used exclusively if applied consistently for all early retirement projects. This is the only scenario where an early retirement baseline can be applied to systems older than 24 years for ACs and 20 years for HPs. Otherwise, the default should only be used when a project is reported and documented as having a nameplate that is illegible. Default early retirement baselines are specified in Table 28 and Table 29 for use with the default age.

### **Energy Savings Algorithms**

$$Total\ Energy\ Savings\ [\Delta kWh] = kWh_c + kWh_H$$

**Equation 19**

$$Cooling\ Energy\ Savings\ [kWh_c] = \left( \frac{Cap_{C,pre}}{\eta_{baseline,C}} - \frac{Cap_{C,post}}{\eta_{installed,C}} \right) \times EFLH_C \times \frac{1\ kW}{1,000\ W}$$

**Equation 20**

$$Heating\ Energy\ Savings\ [kWh_H] = \left( \frac{Cap_{H,pre}}{\eta_{baseline,H}} - \frac{Cap_{H,post}}{\eta_{installed,H}} \right) \times EFLH_H \times \frac{1\ kW}{1,000\ W} \times DAF$$

<sup>104</sup> "Final Evaluation Report for X2001B: Connecticut Measure Life/EUL Update Study-Residential & Commercial". Prepared by Michaels Energy in partnership with Evergreen Economics for the Connecticut Energy Efficiency Board. p. 12-13, Table 3. May 11, 2023. [https://energizect.com/sites/default/files/documents/X2001BFINALReport\\_051523.pdf](https://energizect.com/sites/default/files/documents/X2001BFINALReport_051523.pdf).

Equation 21

### Demand Savings Algorithms

$$\text{Summer Peak Demand Savings } [\Delta kW] = \left( \frac{Cap_{C,pre}}{\eta_{baseline,C}} - \frac{Cap_{C,post}}{\eta_{installed,C}} \right) \times CF_S \times \frac{1 kW}{1,000 W}$$

Equation 22

$$\text{Winter Peak Demand Savings } [\Delta kW] = \left( \frac{Cap_{H,pre}}{\eta_{baseline,H}} - \frac{Cap_{H,post}}{\eta_{installed,H}} \right) \times CF_W \times \frac{1 kW}{1,000 W} \times DAF$$

Equation 23

Where:

- $Cap_{C/H,pre}$  = For early retirement (ER), cooling/heating capacity of the existing equipment; for replace-on-burnout (ROB) and new construction (NC), rated cooling/heating capacity of the new equipment [Btuh]; 1 ton = 12,000 Btuh
- $Cap_{C/H,post}$  = Cooling/heating capacity of the new equipment [Btuh]; 1 ton = 12,000 Btuh

Note: When claiming early retirement or rightsizing savings, pre- and post-capacity should be expressed as a nominal tonnage multiplied by 12,000 Btuh/ton. In all other cases, pre- and post-capacity should be set equal to the rated post-capacity at AHRI standard conditions.

- $\eta_{baseline,C}$  = Baseline cooling efficiency of existing equipment (ER) or standard equipment (ROB/NC) [Btuh/W]
- $\eta_{installed,C}$  = Rated cooling efficiency of the newly installed equipment (must exceed ROB/NC baseline efficiency standards in Table 28 and Table 29) [Btuh/W]
- $\eta_{baseline,H}$  = Baseline heating efficiency of existing equipment (ER) or standard equipment (ROB/NC) [Btuh/W]
- $\eta_{installed,H}$  = Rated heating efficiency of the newly installed equipment (must exceed baseline efficiency standards in Table 29) [Btuh/W]

Note: Use SEER2 for cooling kWh, EER2 for summer kW, and HSPF2 for heating kWh and winter kW savings calculations.

- $EFLH_{C/H}$  = Cooling/heating equivalent full-load hours (Table 30)
- $DAF$  = Documentation adjustment factor; set to 0.75 for residences reporting electric resistance heat with no backup documentation or set to 1.0 in all other cases

$CF_{SW}$  = Summer/winter seasonal peak coincidence factor (Table 31)

Table 30. Central and Mini-Split AC/HPs—Equivalent Full Load Cooling/Heating Hours<sup>105</sup>

Climate zone	EFLH <sub>C</sub>	EFLH <sub>H</sub>
Zone 1: Amarillo	1,142	1,880
Zone 2: Dallas	1,926	1,343
Zone 3: Houston	2,209	1,127
Zone 4: Corpus Christi	2,958	776
Zone 5: El Paso	1,524	1,559

Table 31. Central and Mini-Split AC/HPs—Coincidence Factors<sup>106</sup>

Season	CF
Summer <sup>107</sup>	0.87
Winter <sup>108</sup>	0.83

### Early Retirement

Annual energy (kWh) and summer peak demand (kW) savings must be calculated separately for two time periods:

1. The estimated remaining life of the equipment that is being removed, designated the remaining useful life (RUL), and
2. The remaining time in the EUL period (EUL – RUL).

Annual energy and summer peak demand savings are calculated by weighting the early retirement and replace-on-burnout savings by the RUL of the unit and the remainder of the EUL period, as outlined in the Volume 3 appendices.

<sup>105</sup> ENERGY STAR Central AC/HP Savings Calculator.

<sup>106</sup> Coincidence factors calculated in accordance with the current peak definition are lower than expected for the Texas climate. Residential HVAC measures will temporarily revert to the coincidence factors used in TX TRM v4.0 before the change to the peak definition. These values will be reevaluated in upcoming TRM cycles to better align with the current peak definition.

<sup>107</sup> Air Conditioning Contractors of America (ACCA) Manual S recommends that residential heat pumps be sized at 115 percent of the maximum cooling requirement of the residence (for cooling-dominated climates). Assuming that maximum cooling occurs during the peak period, the guideline leads to a coincidence factor of  $1 / 1.15 = 0.87$ .

<sup>108</sup> Air Conditioning Contractors of America (ACCA) Manual S recommends that residential heat pumps be sized at 115 percent of the maximum cooling requirement of the residence (for cooling-dominated climates). Based on AHRI data for 1.5–5 ton HVAC systems, the average ratio of rated heating capacity to cooling capacity is 0.96. Assuming that maximum heating occurs during the peak period and adjusting for the average ratio of heating to cooling capacity, the guideline leads to a coincidence factor of  $0.96 / 1.15 = 0.83$ .

Where:

RUL = Remaining useful life (see Table 32 or Table 33). If individual system components were installed at separate times, use the condenser age as a proxy for the entire system. For HPs replacing an AC with an electric resistance furnace, use the AC RUL table.

EUL = Estimated useful life = ~~18-20~~ years (AC); ~~15~~ years (HP)

Table 32. Central and Mini-Split AC/HPs—RUL of Replaced AC<sup>109</sup>

Age of replaced unit (years)	Remaining useful life (years)	Age of replaced unit (years)	Remaining useful life (years)
1	16.8	14	8.6
2	15.8	15	8.2
3	14.9	16	7.9
4	14.1	17	7.6
5	13.3	18	7.0
6	12.6	19	6.0
7	11.9	20	5.0
8	11.3	21	4.0
9	10.8	22	3.0
10	10.3	23	2.0
11	9.8	24	1.0
12	9.4	25 <sup>110,111</sup>	0.0
13	9.0		

Table 33. Central and Mini-Split AC/HPs—RUL of Replaced HP<sup>112</sup>

Age of replaced unit (years)	Remaining useful life (years)	Age of replaced unit (years)	Remaining useful life (years)
1	13.7	12	7.9
2	12.7	13	7.6
3	12.0	14	7.0
4	11.3	15	6.0

<sup>109</sup> Current federal standard effective date is January 1, 2023. Existing units manufactured as of 20243 are not eligible to use the early retirement baseline and should use the ROB baseline instead.

<sup>110</sup> RULs are capped at the seventy-fifth percentile as determined based on DOE survival curves (see Figure 1). Systems older than this age should use the ROB baseline. See the January 2015 memo, "Considerations for Early Replacement of Residential Equipment," for further detail.

<sup>111</sup> Ward, B., Bodington, N., Farah, H., Reeves, S., and Lee, L. "Considerations for Early Replacement of Residential Equipment." Prepared by the Evaluation, Measurement, and Verification (EM&V) team for the Electric Utility Marketing Managers of Texas (EUMMOT). January 2015. This document has been made available to Texas investor-owned utilities through the EM&V team's SharePoint.

<sup>112</sup> Current federal standard effective date is January 1, 2023. Existing units manufactured as of 20243 are not eligible to use the early retirement baseline and should use the ROB baseline instead.

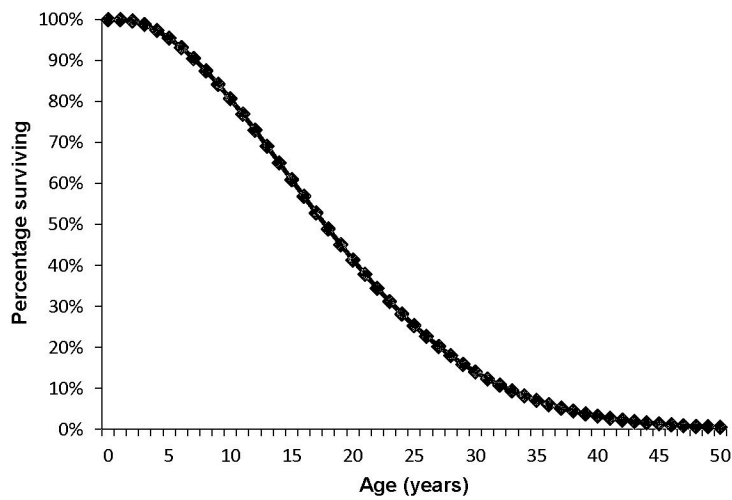
Age of replaced unit (years)	Remaining useful life (years)
5	10.7
6	10.2
7	9.7
8	9.3
9	8.9
10	8.5
11	8.2

Age of replaced unit (years)	Remaining useful life (years)
16	5.0
17	4.0
18	3.0
19	2.0
20	1.0
21 <sup>113</sup>	0.0

### Derivation of RULs

ACs have an estimated useful life of 18 years, and HPs have an estimated useful life of 15 years. This estimate is consistent with the age at which approximately 50 percent of ACs and HPs installed in a given year will no longer be in service, as described by the survival function in Figure 1 and Figure 2.

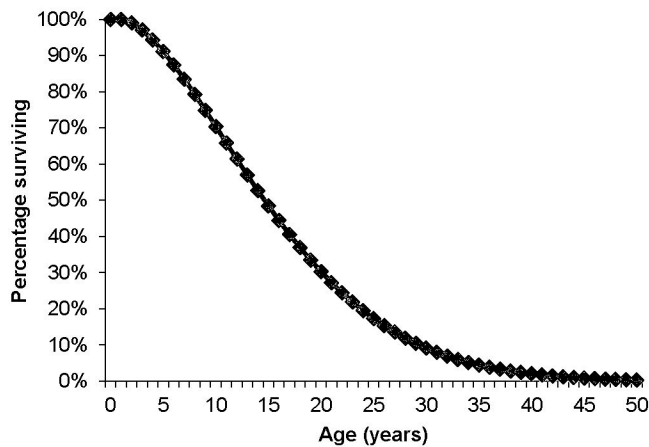
Figure 1. Central and Mini-Split AC/HPs—AC Survival Function<sup>114</sup>



<sup>113</sup> See footnotes on default age from previous table.

<sup>114</sup> Department of Energy, Federal Register, 76 FR 37408, Technical Support Document: 8.2.3.5 Lifetime. June 2011. [http://www1.eere.energy.gov/buildings/appliance\\_standards/product.aspx/productid/75](http://www1.eere.energy.gov/buildings/appliance_standards/product.aspx/productid/75). Download TSD at: <http://www.regulations.gov/#!documentDetail;D=EERE-2011-BT-STD-0011-0012>.

Figure 2. Central and Mini-Split AC/HPs—HP Survival Function<sup>115</sup>



The method for estimating the RUL of a replaced system uses the age of the existing system to re-estimate the projected unit lifetime based on the survival function shown in Figure 1 and Figure 2. The age of the system being replaced is found on the horizontal axis, and the corresponding percentage of surviving system is determined from the chart. The surviving percentage value is then divided in half, creating a new estimated useful lifetime applicable to the current unit age. The age (year) that corresponds to this new percentage is read from the chart. RUL is estimated as the difference between that age and the current age of the system being replaced.

### Deemed Energy Savings Tables

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### Deemed Summer Demand Savings Tables

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### Deemed Winter Demand Savings Tables

There are no lookup tables available for this measure. See engineering algorithms in the previous section for calculating energy and demand savings.

### Claimed Peak Demand Savings

Refer to Volume 1, Section 4 for further details on peak demand savings and methodology.

<sup>115</sup> Ibid.

## Additional Calculators and Tools

Not applicable.

## Measure Life and Lifetime Savings

The estimated useful life (EUL) is ~~20~~<sup>18</sup> years for ~~an-ACs~~ and ~~15 years for a-HPs unit~~ based on ~~multiple studies supportive of a 20+ year EUL for various space conditioning technologies.~~<sup>116,117</sup> ~~the current DOE Final Rule standards for ACs and HPe.~~<sup>118</sup>

~~This value is consistent with the EUL reported in the Department of Energy 76 Final Rule 37408 Technical Support Document for Energy Conservation Standards for Air Conditioners and Heat Pumps.~~<sup>119</sup>

## Program Tracking Data and Evaluation Requirements

Primary inputs and contextual data that should be specified and tracked by the program database to inform the evaluation and apply the savings properly are:

- Climate zone or county
- Decision/action type (early retirement, replace-on-burnout, new construction)
- Manufacturer, model, and serial number of newly installed unit
  - AHRI/DOE CCMS certificate or reference number matching manufacturer and model number
- ~~Nominal cooling tonnage of retired unit (tons) (ER baseline only)~~<sup>120</sup>  
~~yearly retirement or replace-on-burnout)~~
- Cooling capacity of the newly installed unit (Btuh)
- Heating capacity of the newly installed unit (Btuh) (HPs only)
- Seasonal energy efficiency ratio (SEER2) and energy efficiency ratio (EER2) of the newly installed unit

<sup>116</sup> "Residential HVAC and DHW Measure Effective Useful Life Study Final Report". Group A, CALMAC ID: CPU0368.02. Prepared by DNV for the California Public Utilities Commission. p. 8, Table 1-3. April 9, 2024.

[https://www.calmac.org/publications/CPUC\\_Group\\_A\\_2023\\_Res\\_HVAC\\_and\\_DHW\\_EUL\\_Study\\_Final\\_ReportES.pdf](https://www.calmac.org/publications/CPUC_Group_A_2023_Res_HVAC_and_DHW_EUL_Study_Final_ReportES.pdf).

<sup>117</sup> "Final Evaluation Report for X2001B: Connecticut Measure Life/EUL Update Study-Residential & Commercial". Prepared by Michaels Energy in partnership with Evergreen Economics for the Connecticut Energy Efficiency Board. p. 12-13, Table 3. May 11, 2023.

[https://energizect.com/sites/default/files/documents/X2001BFINALReport\\_051523.pdf](https://energizect.com/sites/default/files/documents/X2001BFINALReport_051523.pdf).

<sup>118</sup> Final Rule: Standards, Federal Register, 76 FR 37408 (June 27, 2011) and associated Technical Support Document.

[http://www1.eere.energy.gov/buildings/appliance\\_standards/product.aspx/productid/75](http://www1.eere.energy.gov/buildings/appliance_standards/product.aspx/productid/75). Download TSD at: <http://www.regulations.gov/#/documentDetail;D=EERE-2011-BT-STD-0011-0012>.

<sup>119</sup> Department of Energy, Federal Register, 76 FR 37408, Technical Support Document: 8.2.3.5 Lifetime- June 2011.

<sup>120</sup> Assume nominal baseline heating tonnage is equal to nominal baseline cooling tonnage.



- Heating seasonal performance factor (HSPF2) of the newly installed unit (HPs only)
- Type of unit replaced (AC with gas furnace, AC with electric resistance furnace, air-source HP)
  - Baseline equipment used for savings (if different from unit replaced)
- Type of unit installed (central AC, central HP, dual-fuel HP, mini-split AC, mini-split HP, DC inverter AC, DC inverter HP)
- Unit type subcategory (split, packaged)
- Compressor type for newly installed unit (single-stage, multi-stage, variable speed)
  - ~~Recommended to assist with development of future deemed savings for variable-speed systems~~
- Age of the replaced unit (early retirement only unless default EUL is applied consistently across the program)
- Retired or replaced heating unit model number, serial number, manufacturer, and heating capacity (electric resistance only)
  - Photograph of retired heating unit nameplate, utility inspection, recording nameplate information, or other evaluator-approved approach. Sampling is allowed for multifamily complexes
  - ~~If documentation is not provided, an adjustment factor of 0.75 will be applied to the heating energy and winter demand savings~~
- Retired cooling unit model number, serial number, manufacturer, and cooling capacity (rightsizing or early retirement unless default EUL is applied consistently across the program)
- Manual J load calculation (rightsizing). See the Eligibility Criteria section for applicable scenarios.
- Photograph of retired cooling unit nameplate (required for all rightsizing projects and early retirement projects unless default age is applied consistently across the program)
  - If a photograph of the retired unit nameplate is unavailable or not legible, provide a photo and/or description documenting the reason why the nameplate photo was unobtainable (early retirement only)
  - If a photograph of the retired unit nameplate is unavailable or not legible, provide estimated square footage of conditioned area served by the retired unit (rightsizing only)
- Photograph demonstrating functionality of existing equipment and/or customer responses to survey questionnaire documenting the condition of the replaced unit and their motivation for measure replacement for early retirement eligibility determination (early retirement only). This requirement also applies to projects using the default age.

- For installed HVAC systems equal to minimum federal standard SEER2 efficiency:
  - Age of removedexisting equipment
  - Proof of functionality of removedexisting equipment
  - Rated SEER of removed equipment, if available
- If replacing an evaporative cooler, application should include a statement that the customer decision to change equipment types predates or is independent of the decision to install efficient equipment
- Proof of purchase with date of purchase and quantity
  - Alternative: photo of unit installed or other pre-approved method of installation verification

## **References and Efficiency Standards**

### **Petitions and Rulings**

Not applicable.

### **Relevant Standards and Reference Sources**

Please refer to measure citations for relevant standards and reference sources.

### **Document Revision History**

Table 34. Central and Mini-Split AC/HPs—Revision History

TRM version	Date	Description of change
<a href="#">v1.0</a>	<a href="#">11/25/2013</a>	<a href="#">TRM v1.0 origin.</a>
<a href="#">v2.0</a>	<a href="#">4/18/2014</a>	<a href="#">TRM v2.0 update. Low-income and hard-to-reach Market Transformation section merged with main measure as "early retirement" option. Updated by Frontier Energy, March 2014, based on new federal standards.</a>
<a href="#">v2.1</a>	<a href="#">1/30/2015</a>	<a href="#">TRM v2.1 update. No revision.</a>
<a href="#">v3.0</a>	<a href="#">4/10/2015</a>	<a href="#">TRM v3.0 update. early retirement savings may be claimed through any appropriately designed program in accordance with EM&amp;V team's memo. "Considerations for early replacement of residential equipment." Remaining useful lifetimes updated.</a>
<a href="#">v3.1</a>	<a href="#">11/05/2015</a>	<a href="#">TRM v3.1 update. Revision of cooling savings to reflect heat-pump-specific performance curves. Extension of early retirement cooling savings tables to higher SEER values. Clarification around summer demand savings for single-stage and two-stage units.</a>
<a href="#">v4.0</a>	<a href="#">10/10/2016</a>	<a href="#">TRM v4.0 update. Added RUL value for units with an age of one year. Added a default RUL value for when the age of the unit is unknown. Eliminated the eligibility requirement of the existing unit to have a minimum age of five years. Updated savings for 15.0-15.9 SEER</a>

TRM version	Date	Description of change
		<u>range.</u>
<u>v5.0</u>	<u>10/2017</u>	<u>TRM v5.0 update. Switched to air conditioner capacity and EIR curve coefficients for estimated heat pump cooling savings. Updated energy savings to use TMY3 temperature bin hours. Updated demand savings for compliance with current peak definition. Added 12.44 SEER and 6.8 HSPF baseline savings tables previously referencing earlier version of TRM. Updated baseline to include replacing air conditioners with gas heat.</u>
<u>v6.0</u>	<u>11/2018</u>	<u>TRM v6.0 update. Updated baseline and eligibility requirements. Added rightsizing savings for replace on burnout in winter demand tables. Added language clarifying use of rated capacity vs nominal and updated the deemed savings tables to show rated Btuh. Clarified required documentation for early retirement.</u>
<u>v7.0</u>	<u>10/2019</u>	<u>TRM v7.0 update. Consolidated central air conditioner and heat pump measures. Moved deemed savings tables to Appendix A. Updated eligibility for low-income and hard-to-reach.</u>
<u>v8.0</u>	<u>10/2020</u>	<u>TRM v8.0 update. Clarified early retirement age eligibility. Updated electric resistance baseline documentation.</u>
<u>v9.0</u>	<u>10/2021</u>	<u>TRM v9.0 update. Updated early retirement age eligibility. Clarified eligibility for systems where EER does not meet CEE Tier 0 requirements.</u>
<u>v10.0</u>	<u>10/2022</u>	<u>TRM v10.0 update. Temporarily split measures to address SEER2 compliance sell through for central HPs. Updated early retirement age eligibility.</u>
<u>v11.0</u>	<u>10/2023</u>	<u>TRM v11.0 update. Defined rightsizing and documentation requirements. Updated early retirement age eligibility.</u>
<u>v12.0</u>	<u>10/2024</u>	<u>TRM v12.0 update. Clarified documentation requirements and minimum efficiency. Updated early retirement eligibility.</u>

### 2.2.3 ENERGY STAR® Room Air Conditioners Measure Overview

**TRM Measure ID:** R-HV-RA

**Market Sector:** Residential

**Measure Category:** HVAC

**Applicable Building Types:** Single-family, multifamily, manufactured

**Fuels Affected:** Electricity

**Decision/Action Type(s):** Replace-on-burnout, early retirement, new construction

**Program Delivery Type(s):** Prescriptive

**Deemed Savings Type:** Deemed savings calculation

**Savings Methodology:** Engineering algorithms and estimates

#### Measure Description

The following deemed savings values are applicable to the installation of a high-efficiency room air conditioner.

#### Eligibility Criteria

Installed room air conditioners (RACs) must be compliant with the current ENERGY STAR specification for RACs.

To claim early retirement savings, the replaced unit must be functioning at the time of removal with a maximum age of 12 years, coinciding with the point at which there is no assumed remaining useful life.

#### Baseline Condition

For new construction and replace-on-burnout, the baseline is assumed to be a new room air conditioning unit that is compliant with the current federal standard,<sup>121</sup> effective June 1, 2014. The standard refers to a revised efficiency rating, Combined Energy Efficiency Ratio (CEER), which accounts for standby/off-mode energy usage.

For early retirement, the baseline efficiency is assumed to match the minimum federal standard efficiencies in place prior to June 1, 2014. Since the effective date occurred mid-year, existing systems manufactured as of 2015 are not eligible for early retirement.

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<sup>121</sup> Legacy DOE minimum efficiency standard for residential room air conditioners effective during current federal standard manufacturer lag period. <https://www.ecfr.gov/current/title-10/chapter-III/subchapter-D/part-430/subpart-C/section-430.32>.