

# Decommissioning Guidance Checklist for Category 2B



NYS Clean Heat



This Decommissioning Guidance Checklist for the NYS Clean Heat Program (Program) on behalf of Central Hudson Gas and Electric, Consolidated Edison Company of New York, Inc., New York State Electric & Gas, Niagara Mohawk Power Corporation d/b/a National Grid, Rochester Gas and Electric, and Orange & Rockland Utilities, Inc. (together, the “New York Electric Utilities”), sets forth decommissioning standards in order to be eligible for the Category 2B incentive levels offered by each of the New York Electric Utilities. The checklist items below are required in order to receive an incentive when a customer elects to have an existing fossil fuel space heating or domestic hot water (DHW) heating appliance retired or removed in conjunction with the installation of an eligible heat pump system.

The participating contractor overseeing eligible work under the Program remains responsible for complying with all applicable federal, state, and municipal laws, regulations, and codes in connection with all work performed on behalf of the customer.

While the decommissioning standards proposed by this Decommissioning Guidance Checklist are generally based on best practices, this Decommissioning Guidance Checklist is not intended to create a reliance on the part of any customer or contractor participating in any incentive program sponsored by a New York Electric Utility, nor is it intended to take the place of the knowledge, expertise, and obligation of any contractor retained by a customer to perform work in connection with New York Electric Utility incentives. Nor is the guidance intended to supercede existing building or fire code requirements that may apply to homeowners, landlords, or in-home contractors. None of the New York Electric Utilities are parties to any contract with a customer for the performance of work in connection with any incentives, nor are New York Electric Utilities parties to any contract with any contractor or subcontractor for the performance of any work for a customer.

The checklist tasks provided below should be performed and submitted as part of the incentive application to claim a Category 2B incentive. Category 2B incentives are offered only for HVAC system replacements.

New construction projects, including gut rehabs, are not eligible. In addition, the incentive applies only to decommissioning fossil fuel systems, as depicted in the scenarios in the General Requirement section below. Note that the tasks vary slightly according to the fossil fuel used by the space heating system or the DHW system being decommissioned and/or building type. If an existing fossil fuel space heating and DHW system share a common exhaust vent, then the Program considers best practice to be to decommission both appliances and to replace the water heater with an eligible heat pump water heater (HPWH).<sup>1</sup>

If the specific decommissioning scope encountered is not reflected in one of the scenarios below, then please contact your Program account manager or ICF at [NYSCleanHeat@icf.com](mailto:NYSCleanHeat@icf.com) or 1-844-212-7823.

In addition to this Guidance Checklist on decommissioning existing systems, the Program strongly recommends the installation of a carbon monoxide detector and smoke detector in the building during installation of Clean Heat eligible equipment, even if removing fossil heating equipment, as a customer protection best practice.<sup>2</sup>

<sup>1</sup> Health and safety risks may arise from leaving a fossil fuel DHW system orphaned on an exhaust vent that it previously shared with a fossil heating system, which is usually the primary appliance on shared exhaust venting. Removal of the primary appliance can cause the exhaust venting to be oversized for the smaller DHW system, preventing it from establishing draft during cold weather start-up and leading to the spillage of dangerous levels of carbon monoxide into the building.

<sup>2</sup> This guidance is not intended to supplant existing building or fire code requirements that apply to homeowners, landlords, or in-home contractors.

## General Requirement

To be eligible for a Category 2B incentive, the heat pump system installed must be sized to satisfy  $\geq 100\%$  of the building heating load at design temperature.

### 1. Decommissioning an Existing Natural Gas or Liquefied Petroleum Gas (Propane) Heating System and DHW System

In the case of existing natural gas or propane space and DHW heating systems, the Program considers best practice to be total removal of the heating appliance(s). If the system being removed used propane and there will no longer be use of propane in the building after the installation of equipment eligible under the Program, then the propane storage tank(s) should be removed by the propane delivery company that provided it.

#### Best Practice

- Remove the natural gas or propane space heating appliance and DHW tank (if present). Includes removing all connecting fuel lines to the appliance and permanently sealing any exhaust vent openings.

#### Contractor Required Actions if Heating Appliances Are Not Removed

- Remove fuel lines to the space heating and DHW heating appliance(s) as far back to the source as possible in order to minimize the length of any unused fuel line(s) remaining in the building. For natural gas, remove the fuel line(s) as far back to the natural gas meter as possible. For propane, remove the fuel line(s) as far back to the propane regulator as possible.
- Permanently seal any exhaust vent openings.
- Remove burner assembly on each space and DHW heating appliance being decommissioned.
- Remove zone circulator pumps and cap circulation pipes (boiler).
- Disconnect and seal ductwork to air handler (furnace).
- Remove the space heating control module and wiring for any space heating appliance being decommissioned.
- Remove the thermostat controlling the natural gas heating or propane space heating appliance (if applicable).
- Confirm existing thermostat is to be used to control the heat pump system being installed (if applicable).

#### Customer Required Notification

- If decommissioning of a natural gas space heating and DHW system removes all natural gas use in the building, call gas company to remove meter and riser.

**Con Edison: 1-800-752-6633**

**National Grid: 1-718-643-4050**

**Orange & Rockland: 1-877-434-4100**

**Central Hudson: 1-845-452-2700**

**NYSEG : 1-800-572-1111**

**RG&E: 1-800-743-2110**

- If decommissioning a propane space heating and DHW system removes all propane use in the building, call the propane delivery company to recover its storage tank.

### 2. Decommissioning an Existing Natural Gas or Liquefied Petroleum Gas (Propane) Heating System While Leaving Natural Gas or Propane DHW System in Operation

#### 2a. Standalone Combustion DHW Tank

##### Best Practice

- Remove the natural gas or propane space heating appliance, as well as all connecting fuel lines to the appliance, and permanently seal or resize any exhaust vent openings.

##### Contractor Required Actions if Space Heating Appliance Is Not Removed

- Remove fuel line to the space heating appliance as far back to the source as possible to minimize the length of any unused fuel line(s) remaining in the building. For natural gas, remove the fuel line(s) as far back to the natural gas meter as possible. For propane, remove the fuel line(s) as far back to the propane regulator as possible.
- Permanently seal any exhaust vent openings remaining after space heating appliance removal.

- Remove burner assembly on space heating appliance.
- Remove heating zone circulator pumps and cap circulation pipes (boiler).
- Disconnect and seal ductwork to air handler (furnace).
- Remove the space heating control module and wiring for any space heating appliance being decommissioned.
- Remove the thermostat controlling the natural gas heating or propane space heating appliance (if applicable).
- Confirm existing thermostat is to be used to control the heat pump system being installed (if applicable).
- If necessary, resize the DHW system's exhaust vent to manufacturer's specifications to mitigate threat of carbon monoxide spillage.

## 2b. Indirect DHW Tank or Tankless Coil Requiring Continuing Boiler Operation

- Remove zone control wiring between the space heating zones and the boiler's control module.
- Remove the thermostat controlling the boiler (if applicable).
- Confirm existing thermostat will be used to control the heat pump system being installed (if applicable).
- Remove all space heating zone circulator pumps and valves, and cap circulation pipes.

## 3. Decommissioning of Existing Heating/Fuel Oil Heating System and DHW System

In the case of existing heating/fuel oil space and DHW heating systems, the Program considers best practice to be total removal of the heating appliance(s). If there is no longer going to be any use of heating/fuel oil in the building after the installation of equipment eligible under the Program, then the heating/fuel oil storage tank(s) must be removed or closed in compliance with all applicable federal, state, and municipal laws, regulations, and codes. For guidance from the NYS Department of Environmental Conservation on heating/fuel oil storage tanks, please refer to:

- [Underground Heating/Fuel Oil Tanks: A Homeowner's Guide—NYS Dept. of Environmental Conservation](#)
- [Petroleum Bulk Storage Program—Regulated Petroleum Products—NYS Dept. of Environmental Conservation](#) (principally for businesses)

### Best Practice

- Remove the heating/fuel oil heating appliance and DHW tank (if present), as well as all connecting fuel lines to the appliance, and permanently seal any exhaust vent openings.

### Contractor Required Actions if Heating Appliances Are Not Removed

- Remove fuel lines to the space heating and DHW heating appliance(s) as far back to the heating/fuel oil tank as possible to minimize the length of any unused fuel line(s) remaining in the building.
- Permanently seal any exhaust vent openings.
- Remove burner assembly on each space and DHW heating appliance being decommissioned.
- Remove zone circulator pumps and cap circulation pipes (boiler).
- Disconnect and seal ductwork to air handler (furnace).
- Remove the space heating control module and wiring for any space heating appliance being decommissioned.
- Remove the thermostat controlling the space heating appliance (if applicable).
- Confirm existing thermostat is to be used to control the heat pump system being installed (if applicable).
- Remove the heating/fuel oil fill pipe or fill it with concrete to prevent inadvertent heating/fuel oil delivery.
- Remove the heating/fuel oil tank in accordance with all applicable federal, state, and municipal laws, regulations, and codes by removing the vent line and either removing the fill line or capping it with cement, or:
- Close the heating tank in accordance with all applicable federal, state, and municipal laws, regulations, and codes by emptying the tank, purging all vapors, filling the tank with an inert substance such as sand, and removing or capping the fill line with concrete (leave vent line in place).

### Customer Required Notification

- Write certified letter to customer's heating/fuel oil delivery company to discontinue service. It is strongly recommended that the customer also call the heating/fuel oil company immediately to discontinue deliveries and to arrange for removal of any unused fuel that is left in the tank.

## 4. Decommissioning of Existing Heating/Fuel Oil Heating System While Leaving Heating/Fuel Oil DHW System in Operation

### 4a. Standalone Combustion DHW Tank

#### Best Practice

- Remove the heating/fuel oil heating appliance, as well as all connecting fuel lines to the appliance, and permanently seal or resize any exhaust vent openings.

#### Contractor Required Actions if Space Heating Appliance Is Not Removed

- Remove fuel line to the space heating appliance as far back to the heating/fuel oil tank source as possible to minimize the length of any unused fuel line(s) remaining in the building.
- Permanently seal any exhaust vent openings remaining after heating/fuel oil heating appliance removal.
- Remove burner assembly on space heating appliance.
- Remove heating zone circulator pumps and cap circulation pipes (boiler).
- Disconnect and seal ductwork to air handler (furnace).
- Remove the thermostat controlling the removed heating/fuel oil heating appliance (if applicable).
- Confirm existing thermostat is to be used to control the heat pump system being installed (if applicable).
- If necessary, resize the DHW system's exhaust vent to manufacturer's specifications to mitigate threat of carbon monoxide spillage.

#### Customer Required Notification

- Contact heating/fuel oil delivery company to notify it of the change in use of heating/fuel oil, which will impact any automatic delivery schedule to require less frequent deliveries.

### 4b. Indirect DHW Tank or Tankless Coil Requiring Continuing Boiler Operation

- Remove control wiring between the space heating zones and the boiler's control module.
- Remove the thermostat controlling the boiler (if applicable).
- Confirm existing thermostat will be used to control the heat pump system being installed (if applicable).
- Remove all space heating zone circulator pumps and valves and cap circulation pipes.

#### Customer Required Notification

- Contact heating/fuel oil delivery company to notify it of the change in use of heating/fuel oil, which will impact any automatic delivery schedule to require less frequent deliveries.

## 5. Decommissioning of Existing Boilers or Selected Apartment Distribution Systems in 2–4 Family Buildings

This section covers scenarios in which a space heating system previously serving two or more apartments in a one to four family building is being decommissioned for one or more apartments, while being kept in service for at least one apartment that did not receive a Clean Heat Program eligible heat pump system. For situations in which the space heating system is being fully decommissioned and will no longer serve any of the apartments, follow the guidance provided in Sections 1–4, as appropriate.

#### Contractor Required Actions

- Remove heating zone circulator pumps for the apartment(s) receiving the heat pump installation and cap circulation pipes.
- Disconnect pipes connecting all hydronic baseboards or steam radiators in the apartment(s) receiving the heat pump installation as flush to the floor as possible to reduce the possibility of reconnection and to prevent injury.
- Remove wiring between the boiler's control module and the boiler for the space heating zones serving the apartment(s) receiving the heat pump installation.
- Remove the thermostat controlling the heating/fuel oil heating appliance in the apartment(s) receiving the heat pump installation (if applicable).
- Confirm existing thermostat will be used to control the heat pump system(s) being installed (if applicable).

## Landlord/Customer Required Notification

If the existing fuel is oil, contact heating/fuel oil delivery company to notify it of the change in use of heating/fuel oil, which will impact any automatic delivery schedule to require less frequent deliveries.

## NYS Clean Heat Participating Contractor Attestation

I attest that I have performed all relevant tasks as laid out on this checklist and that may be otherwise required by law, are met as laid out in the Clean Heat Participating Contractor Agreement governing the project installed for the customer providing attestations below, and I have informed the customer of decommissioning requirements and best practices.

I acknowledge that all other participating contractor expectations are met as laid out in the Central Hudson, Con Edison, O&R, NYSEG, RG&E, or National Grid Participating Contractor Agreement.

Contractor Signature: \_\_\_\_\_

Contractor Name (Print): \_\_\_\_\_

Date: \_\_\_\_\_

## NYS Clean Heat Customer Attestation

I attest that I have performed all relevant tasks as laid out on this checklist, and I have been informed by the contractor of decommissioning requirements and best practices.

I acknowledge that all other customer expectations are met as laid out in the Participation Acknowledgment Form.

Customer Signature: \_\_\_\_\_

Customer Name (Print): \_\_\_\_\_

Date: \_\_\_\_\_