

Instructions for Use: Optional BPA Low-Income Project Information Form [template]

This Form can be customized by your utility. For assistance, contact your EER.

To use this form:

1. Save-as and rename your form.
2. Complete the form fields as indicated.

To customize this form:

1. On the “Developer” tab, click “Restrict Editing”, then “Stop Protecting”
2. Make any edits or customization you choose.

To use your custom form:

1. Finalize your customizations and save.
2. On the “Developer” tab, click “Restrict Editing”. Then, under 2. “Editing Restrictions”, select “Filling in forms”.



Please return this form to:

Optional BPA Low-Income Project Information Form [template]

For residential applications. This data collection tool is optional. To customize this form, contact your EER.

Check with the resident's local utility to determine eligibility, technical, documentation, and submission requirements. A purchase receipt, invoice, project and equipment information, and a review of income documentation may be required by the resident's utility and must be promptly submitted following project completion. All projects must be installed and completed according to the technical requirements outlined by the local utility.

CUSTOMER INFORMATION

Applicant Name		Site ID <i>(Added by utility)</i>	
Utility Account Number		Phone	
Installation Street Address		City, State, Zip	
Applicant Mailing Address <i>(if different)</i>		City, State, Zip <i>(if different)</i>	
Applicant Email		Occupancy Type	<input type="checkbox"/> Owner Occupied <input type="checkbox"/> Rental
Landlord Name <i>(if applicable)</i>		Landlord Phone <i>(if applicable)</i>	
Home type	<input type="checkbox"/> Existing Single-family <input type="checkbox"/> Existing Manufactured Home <input type="checkbox"/> Existing Multifamily low-rise (5+ dwelling units in same structure up to 3 stories high) <input type="checkbox"/> Existing Multifamily mid/high-rise (5+ dwelling units in same structure more than 3 stories high)		
Primary Heating Type	<input type="checkbox"/> Ducted Electric Heat Pump <input type="checkbox"/> Ductless Heat Pump <input type="checkbox"/> Electric Forced Air Electric <input type="checkbox"/> Zonal Electric <input type="checkbox"/> Natural Gas <input type="checkbox"/> Oil <input type="checkbox"/> Wood Stove		
Water Heating Type <i>(if applicable)</i>	<input type="checkbox"/> Electric <input type="checkbox"/> Natural Gas <input type="checkbox"/> Oil		

PROJECT COST INFORMATION

Important: Some measures are not available for certain housing types. Example: Wall Insulation is not available for manufactured homes. Contact your local utility with questions about technical and efficiency project eligibility, eligible housing types, and available incentives. All listed rebate amounts last updated on October 1, 2023.

Project type See pages 3-5 for documentation requirements.	Quantity or Square Feet [A]	Installed Equipment Cost [B]	Qualified Repair Cost [C]	Rebate Amount Dollar-for-dollar, up to cost cap listed below.	Estimated Rebate To be confirmed by the utility	How to Calculate
Attic or Roof Insulation				Dollar-for-dollar		Add B+C
Floor Insulation				Dollar-for-dollar		Add B+C
Wall Insulation				Dollar-for-dollar		Add B+C
Prime Window				Up to \$45/sq ft		Lesser of [A*45+C] or [B+C]

Patio Door				Up to \$45/sq ft		Lesser of [A*45+C] or [B+C]
Low-E Storm Window				Up to \$10/sq ft		Lesser of [A*10+C] or [B+C]
Exterior Insulated Door				Up to \$700/door		Lesser of [A*700+C] or [B+C]
Whole House Air Sealing				Dollar-for-dollar		Add B+C
Prescriptive Air Sealing				Dollar-for-dollar		Add B+C
Door Sweep			N/A	Up to \$35		Lesser of [A*35] or B
Clothes Washer – ENERGY STAR Front Load or Top Load			N/A	Up to \$800		Lesser of \$800 or B
Clothes Dryer – ENERGY STAR or BPA Tiers 1 - 3			N/A	Up to \$800		Lesser of \$800 or B
Unitary Heat Pump Water Heater – 40 gal				Up to \$2,800		Lesser of [2800+C] or [B+C]
Unitary Heat Pump Water Heater – 50 gallon and above – Tier 3 or 4				Up to \$3,000		Lesser of [3000+C] or [B+C]
Ductless or Ducted Mini-Split Heat Pump(s) or Ductless Heat Pump (DHP) Conversion				Up to \$6,000/DHP		Lesser of [A*6000+C] or [B+C]
Ducted Air Source Heat Pump Conversion (non-Variable Speed)				Up to \$9,000		Lesser of [9000+C] or [B+C]
Variable Speed Heat Pump Conversion				Up to \$9,000		Lesser of [9000+C] or [B+C]
Variable Speed Heat Pump Upgrade				Up to \$9,000		Lesser of [9000+C] or [B+C]
Packaged Terminal Heat Pump				Up to \$1,600		Lesser of [1600+C] or [B+C]
Prescriptive Duct Sealing				Up to \$750		Lesser of [750+C] or [B+C]
Duct Insulation				Dollar-for-dollar		Add B+C
Line Voltage Thermostat			N/A	Up to \$85		Lesser of [A*85] or B
Communicating Line Voltage Thermostat			N/A	Up to \$225		Lesser of [A*225] or B
Advanced Smart Thermostat (Direct-Installed)			N/A	Up to \$400		Lesser of [A*400] or B
Commercial Connected Thermostat (Multifamily shared common areas only)			N/A	Up to \$400		Lesser of [A*400] or B
Commercial Ductless Heat Pump Retrofit or Upgrade (Retrofit multifamily shared common areas only)				Up to \$2,000/ton		Lesser of [A*2000+C] or [B+C]
Commercial Ducted Air Source Heat Pump Retrofit or Upgrade (Retrofit multifamily shared common areas only)				Up to \$1,400/ton		Lesser of [A*1400+C] or [B+C]
						Estimated Rebate Total

DOCUMENTATION REQUIREMENTS

Use these checklists to help compile documents for submission. For all projects, provide a detailed invoice plus any project-specific back-up documentation listed below. **Important:** Some measures are not available for certain housing types. Example: Wall Insulation is not available for manufactured homes. Contact your local utility with questions about technical and efficiency eligibility, eligible housing types, and available incentives.

Proof of income eligibility	<input type="checkbox"/>	Proof or attestation that the end user's income eligibility was reviewed from a verifiable source (e.g., paystub, Section 8 voucher, etc.) or documentation that self-attestation of income signed by the end-user was reviewed.
Equipment or contractor invoice for each completed project showing	<input type="checkbox"/>	Documentation that installation and product(s) meet the project-specific requirements
	<input type="checkbox"/>	Purchase or installation date
	<input type="checkbox"/>	Eligible energy efficient project cost
	<input type="checkbox"/>	Eligible low-income repair costs, if applicable
	<input type="checkbox"/>	Quantity

Project-Specific Backup Documentation

Attic or Roof Insulation	<input type="checkbox"/>	Beginning R-value attic space 1	
	<input type="checkbox"/>	Ending R-value attic space 1	
	<input type="checkbox"/>	Beginning R-value attic space 2 (if applicable)	
	<input type="checkbox"/>	Ending R-value attic space 2 (if applicable)	
Floor Insulation	<input type="checkbox"/>	Beginning R-value floor space 1	
	<input type="checkbox"/>	Ending R-value floor space 1	
	<input type="checkbox"/>	Beginning R-value floor space 2 (if applicable)	
	<input type="checkbox"/>	Ending R-value floor space 2 (if applicable)	
Wall Insulation	<input type="checkbox"/>	Beginning R-value wall space	
	<input type="checkbox"/>	Ending R-value wall space	
	<input type="checkbox"/>	Beginning R-value wall space 2 (if applicable)	
	<input type="checkbox"/>	Ending R-value wall space 2 (if applicable)	
Prime Window or Patio Door	<input type="checkbox"/>	NFRC stickers or other verification of U-value for each window	
	<input type="checkbox"/>	Completed Windows Worksheet below or document of (a) number and square footage of windows or patio doors replaced, (b) precondition (frame type, i.e., wood, metal, single/double-pane), and (c) post-condition U-value.	
Low-E Storm Window	<input type="checkbox"/>	Copy of ENERGY STAR® product list showing the product or product information insert or packaging that includes the ENERGY STAR logo. (BPA will accept pre-existing models that were ENERGY STAR certified at the time they were manufactured.)	
	<input type="checkbox"/>	Completed Windows Worksheet or alternatively, documentation (a) of number and square footage of storm windows installed; and (b) precondition (frame type, i.e., wood, metal) and number of window panes (single/double	
Exterior Insulated Door	<input type="checkbox"/>	Pre-existing door is an uninsulated or thermally substandard exterior door	
	<input type="checkbox"/>	Documentation door is either ENERGY STAR-Certified or NFRC-rated and meets U-factor and solar heat gain co-efficient specifications listed in the BPA Implementation Manual (e.g. a copy of the ENERGY STAR product list showing the product, product information insert, packaging that includes the ENERGY STAR logo, or a copy of the NFRC sticker). If the door is not ENERGY STAR-Certified or NFRC-rated, or the	

		ENERGY STAR list is not accessible, utilities may comply by documenting that the door meets ENERGY STAR specifications.	
Whole House Air Sealing	<input type="checkbox"/>	Pre-sealing CFM leakage (CFM at 50 Pa)	
	<input type="checkbox"/>	Post-sealing CFM leakage (CFM at 50 Pa)	
	<input type="checkbox"/>	Total square footage of the pressure zone tested and sealed	
	<input type="checkbox"/>	Building volume	
	<input type="checkbox"/>	Notes on mechanical ventilation requirement: <i>If post air sealing leakage is below .3 air changes per hour, describe what mechanical ventilation was added to meet ASHRAE 62.2. For example, note if bath fan was added that is run on a timer or HRV added.</i>	
Prescriptive Air Sealing	<input type="checkbox"/>	Square footage of area air sealed (attic and/or crawlspace)	
Door Sweep	<input type="checkbox"/>	If distributed 'By Request', documentation of request and/or mailing	
Clothes Washer – ENERGY STAR Front Load or Top Load	<input type="checkbox"/>	Copy of the ENERGY STAR product list showing the product or product information insert or packaging that includes the ENERGY STAR logo. If ENERGY STAR specifications change, BPA will accept pre-existing models that were ENERGY STAR Certified at time of manufacture, or a copy of the BPA Qualified Product List showing the product if applicable.	
Clothes Dryer – ENERGY STAR or BPA Tiers 1 - 3	<input type="checkbox"/>	Copy of the ENERGY STAR product list showing the product or product information insert or packaging that includes the ENERGY STAR logo. If ENERGY STAR specifications change, BPA will accept pre-existing models that were ENERGY STAR Certified at time of manufacture, or copy of the BPA Qualified Product List showing the product if applicable.	
Unitary Heat Pump Water Heater – 40 gal	<input type="checkbox"/>	Manufacturer and model number of installed unit is listed on BPA's HPWH Qualified Products List	
Unitary Heat Pump Water Heater – 50 gallon and above – Tier 3 or 4	<input type="checkbox"/>	Manufacturer and model number of installed unit is listed on BPA's HPWH Qualified Products List	
Ductless or Ducted Mini-Split Heat Pump(s) or Ductless Heat Pump (DHP) Conversion	<input type="checkbox"/>	AHRI Certificate demonstrating unit meets or exceeds federal minimum efficiency	
Ducted Air Source Heat Pump Conversion (non-Variable Speed)	<input type="checkbox"/>	AHRI Certificate documenting unit meets current federal minimum efficiency	
Variable Speed Heat Pump Conversion	<input type="checkbox"/>	AHRI Certificate documenting unit meets current federal minimum efficiency	
	<input type="checkbox"/>	HSPF2 Rating	
	<input type="checkbox"/>	SEER2 Rating	
Variable Speed Heat Pump Upgrade	<input type="checkbox"/>	AHRI Certificate documenting unit meets current federal minimum efficiency	
	<input type="checkbox"/>	HSPF2 Rating	
	<input type="checkbox"/>	SEER2 Rating	
Packaged Terminal Heat Pump	<input type="checkbox"/>	AHRI Certificate	
Prescriptive Duct Sealing	<input type="checkbox"/>	Completed Prescriptive Duct Sealing Form	
Duct insulation	<input type="checkbox"/>	Post Insulation R-value	
Line Voltage Thermostat	<input type="checkbox"/>	Manufacturer	
	<input type="checkbox"/>	Model	

Communicating Line Voltage Thermostat	<input type="checkbox"/>	Manufacturer	
	<input type="checkbox"/>	Model	
Advanced Smart Thermostat (Direct Installed)	<input type="checkbox"/>	Manufacturer and model number of installed unit is listed on BPA's Smart Thermostat Qualified Products List	
	<input type="checkbox"/>	Manufacturer	
	<input type="checkbox"/>	Model	
Commercial Connected Thermostat (<i>Multifamily shared common areas only</i>)	<input type="checkbox"/>	Manufacturer	
	<input type="checkbox"/>	Model	
Commercial Ductless Heat Pump Retrofit or Upgrade (<i>Retrofit multifamily shared common areas only</i>)	<input type="checkbox"/>	AHRI Certificate	
Commercial Ducted Air Source Heat Pump Retrofit or Upgrade (<i>Retrofit multifamily shared common areas only</i>)	<input type="checkbox"/>	AHRI Certificate	

WINDOWS WORKSHEET

Use this worksheet to calculate total square feet for windows and to document pre-existing window and patio door panes and frame types.

	Quantity	Window, patio door, or Low-E Storm window	Pre- existing frame	Pre-existing number of panes (single or double)	Final dimensions (not rounded)	Total square feet (W x H / 144)*	U-Value of new window or patio door
Example	1	window	metal	1	24.25" X 24.5"	4.13	0.29
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
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18							
19							
20							

*Rough opening sizes (used for the purposes of estimates) for windows and patio doors are often 105–110% of **actual** window order measurements. As a result, square footages provided by contractors for cost estimates may overestimate the total square footage by 10% or occasionally more). Final window measurements are used for calculating incentives. BPA allows up to 10% variance between rough opening sizes and total final invoiced window dimensions to account for variability.

INCOME ELIGIBILITY

A household may qualify for incentives if it meets at least one of the following criteria listed in Table 1 below. You may provide proof of income, either by providing verifiable documentation to your utility or Community Action Agency or by signing a self-attestation that your household meets at least one income qualification criteria.

Gross income includes all wages, tips, rental income, public assistance, social security or pensions, income from self-employment, alimony, interest, or any other sources of income defined by the IRS income tax return.

Note to utilities: If needed, contact your EER to customize this income portion for your program.

Table 1: Qualifying Income Criteria

Total Number of People in the Household, Including Yourself	Household's Gross Annual Income
You may qualify for incentives if you meet at least one of the following income criteria or receive assistance from any of the programs below:	
<input type="checkbox"/>	Gross income falls within 200% of the federal poverty line (see Table 2)
<input type="checkbox"/>	Gross income meets your state's income guidelines (if different)
<input type="checkbox"/>	Gross income meets your tribe's income guidelines (if different)
<input type="checkbox"/>	LIHEAP
<input type="checkbox"/>	HUD
<input type="checkbox"/>	NAHASDA
<input type="checkbox"/>	Section 8
<input type="checkbox"/>	TANF
<input type="checkbox"/>	Supplemental Social Security

Table 2: Income Qualifications Based on 200% of 2024 Federal Poverty Level

1 person	\$30,120
2 people	\$40,880
3 people	\$51,640
4 people	\$62,400
5 people	\$73,160
6 people	\$83,920
7 people	\$94,680
8 people	\$105,440
9 or more	Add \$10,760 each

Proof of Income Option 1: Income Verification with Documentation

Submit documentation to entity verifying income or to confirm eligibility. Check with resident's utility to determine if other income documentation is necessary.

Eligible Income Sources	Documentation Submitted to Utility (Only one document necessary)	Utility Verified Documentation (Note: Utility is not required to collect or maintain documentation after verification.)
Community Action Agency Certification	<input type="checkbox"/>	<input type="checkbox"/>
Pay stub	<input type="checkbox"/>	<input type="checkbox"/>
IRS form 1040	<input type="checkbox"/>	<input type="checkbox"/>
LIHEAP certification	<input type="checkbox"/>	<input type="checkbox"/>
HUD eligibility	<input type="checkbox"/>	<input type="checkbox"/>
NAHASDA eligibility	<input type="checkbox"/>	<input type="checkbox"/>
Section 8 eligibility	<input type="checkbox"/>	<input type="checkbox"/>
TANF eligibility	<input type="checkbox"/>	<input type="checkbox"/>
Supplemental Social Security	<input type="checkbox"/>	<input type="checkbox"/>
Proof of current assistance from state health and human services agency	<input type="checkbox"/>	<input type="checkbox"/>
Social Security Income	<input type="checkbox"/>	<input type="checkbox"/>
GA	<input type="checkbox"/>	<input type="checkbox"/>
VA	<input type="checkbox"/>	<input type="checkbox"/>
Unemployment	<input type="checkbox"/>	<input type="checkbox"/>

Proof of Income Option 2: Signed Self-Attestation of Income

Complete the self-attestation to confirm income eligibility if you have not provided documentation of income from eligible sources listed in Option 1.

I, am a Homeowner or Tenant (*check one*) of the single-family home, manufactured home, or multifamily unit that will receive or have received energy efficient upgrades.

I am a customer of . I am aware that this utility and Community Action Agencies in my area can provide energy efficient upgrades at a high-level of assistance, but it requires I prove I meet certain income qualification guidelines. (*check one*)

- I do hereby declare that my gross annual household income does not exceed the maximum income for my household size as indicated in the eligible income threshold above or as stated by my state or tribe.
- OR, I benefit from any of the Eligible Income-Qualified Programs listed below.
- Section 8 eligibility
 - LIHEAP certification
 - HUD Housing
 - Supplemental Social Security Income
 - TANF
 - NAHASDA

I certify that the information presented is true and accurate. I further understand false, misleading or incomplete information may render me (the Applicant) ineligible to receive my utility's higher income-qualified incentive. If my utility finds that any information provided in connection with this application is false, then my utility reserves the right to require reimbursement of any incentives provided to which I am not entitled. My utility reserves the right to request additional documentation or proof of income to verify income qualification and to verify benefits.

Applicant Signature

My signature below certifies that I am eligible for this utility income-qualified incentive program.

Print Name		Date	
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