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”.

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* *(Added by utility)* |       |
| Utility Account Number |       | Phone |       |
| Installation Street Address |       | City, State, Zip |       |
| Applicant Mailing Address *(if different)* |       | City, State, Zip *(if different)* |       |
| Applicant Email |       | Occupancy Type | [ ]  Owner Occupied[ ]  Rental |
| Landlord Name *(if applicable)* |       | Landlord Phone *(if applicable)* |       |
| Home type  | [ ]  Existing Single-family [ ]  Existing Manufactured Home | [ ]  Existing Multifamily low-rise (5+ dwelling units in same structure up to 3 stories high)[ ]  Existing Multifamily mid/high-rise (5+ dwelling units in same structure more than 3 stories high) |
| Primary Heating Type | [ ]  Ducted Electric Heat Pump[ ]  Ductless Heat Pump[ ]  Electric Forced Air Electric[ ]  Zonal Electric | [ ]  Natural Gas[ ]  Oil[ ]  Wood Stove |
| Water Heating Type (if applicable) | [ ]  Electric[ ]  Natural Gas | [ ]  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](#Requirements) 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](#Insulation_Req) |       |       |       | Dollar-for-dollar |       | Add B+C |
| [Floor Insulation](#Insulation_Req) |       |       |       | Dollar-for-dollar |       | Add B+C  |
| [Wall Insulation](#WallInsulation_Req) |       |       |       | Dollar-for-dollar |       | Add B+C  |
| [Prime Window](#Prime_Window_Door_Req)  |       |       |       | Up to $45/sq ft |       |  Lesser of [A\*45+C] or [B+C] |
| [Patio Door](#Prime_Window_Door_Req) |       |       |       | Up to $45/sq ft |       | Lesser of [A\*45+C] or [B+C] |
| [Low-E Storm Window](#LowE_Window_Req)  |       |       |       | Up to $10/sq ft |       | Lesser of [A\*10+C] or [B+C] |
| [Exterior Insulated Door](#Exterior_Door_Req) |       |       |       | Up to $700/door |       | Lesser of [A\*700+C] or [B+C] |
| [Whole House Air Sealing](#Whole_House_Air_Sealing_Req) |       |       |       | Dollar-for-dollar |       | Add B+C |
| [Prescriptive Air Sealing](#Prescriptive_Air_Sealing_Req) |       |       |       | Dollar-for-dollar |       | Add B+C |
| [Door Sweep](#DoorSweep_Req) |       |       | N/A | Up to $35 |       | Lesser of [A\*35] or B |
| [Clothes Washer – ENERGY STAR Front Load or Top Load](#ClothesWasher_Req) |       |       | N/A | Up to $800 |       | Lesser of $800 or B |
| [Clothes Dryer – ENERGY STAR or BPA Tiers 1 - 3](#ClothesDryer_Req) |       |       | N/A | Up to $800 |       | Lesser of $800 or B |
| [Unitary Heat Pump Water Heater – 40 gal](#HPWH40_Req) |       |       |       | Up to $2,800 |       | Lesser of [2800+C] or [B+C] |
| [Unitary Heat Pump Water Heater – 50 gallon and above – Tier 3 or 4](#HPWH50_Req) |       |       |       | 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](#DHP_Req) |       |       |       | Up to $6,000/DHP |       | Lesser of [A\*6000+C] or [B+C] |
| [Ducted Air Source Heat Pump Conversion (non-Variable Speed)](#ASHP_Req) |       |       |       | Up to $9,000 |       | Lesser of [9000+C] or [B+C] |
| [Variable Speed Heat Pump Conversion](#VSHPConversion_Req) |       |       |       | Up to $9,000 |       | Lesser of [9000+C] or [B+C] |
| [Variable Speed Heat Pump Upgrade](#VSHPUpgrade_Req)  |       |       |       | Up to $9,000 |       | Lesser of [9000+C] or [B+C] |
| [Packaged Terminal Heat Pump](#PTHP_Req) |       |       |       | Up to $1,600 |       | Lesser of [1600+C] or [B+C] |
| [Prescriptive Duct Sealing](#Prescriptive_Duct_Sealing_Req) |       |       |       | Up to $750 |       | Lesser of [750+C] or [B+C] |
| [Duct Insulation](#DuctInsulation_Req) |       |       |       | Dollar-for-dollar |       | Add B+C |
| [Line Voltage Thermostat](#LineVoltage_Req) |       |       | N/A | Up to $85 |       | Lesser of [A\*85] or B |
| [Communicating Line Voltage Thermostat](#CommTStat_Req) |       |       | N/A | Up to $225 |       | Lesser of [A\*225] or B |
| [Advanced Smart Thermostat (Direct-Installed)](#SmartTStat_Req) |       |       | N/A | Up to $400 |       | Lesser of [A\*400] or B |
| [Commercial Connected Thermostat](#CommercialTstat_Req) *(Multifamily shared common areas only)* |       |       | N/A | Up to $400 |       | Lesser of [A\*400] or B |
| [Commercial Ductless Heat Pump Retrofit or Upgrade](#CommercialDHP_Req) *(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](#CommercialASHP_Req) *(Retrofit multifamily shared common areas only)* |       |       |       | Up to $1,400/ton |       | Lesser of [A\*1400+C] or [B+C] |
|  |  |  |  |  | **$0.00** | **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** | [ ]  | 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** | [ ]  | Documentation that installation and product(s) meet the project-specific requirements |
| [ ]  | Purchase or installation date |
| [ ]  | Eligible energy efficient project cost |
| [ ]  | Eligible low-income repair costs, if applicable |
| [ ]  | Quantity |

***Project-Specific Backup Documentation***

|  |  |  |
| --- | --- | --- |
| **Attic or Roof Insulation** |[ ]  Beginning R-value attic space 1 |       |
|  |[ ]  Ending R-value attic space 1 |       |
|  |[ ]  Beginning R-value attic space 2 (if applicable) |       |
|  |[ ]  Ending R-value attic space 2 (if applicable) |       |
| **Floor Insulation** |[ ]  Beginning R-value floor space 1  |       |
|  |[ ]  Ending R-value floor space 1  |       |
|  |[ ]  Beginning R-value floor space 2 (if applicable) |       |
|  |[ ]  Ending R-value floor space 2 (if applicable) |       |
| **Wall Insulation** | [ ]  | Beginning R-value wall space |       |
|  |[ ]  Ending R-value wall space |       |
|  |[ ]  Beginning R-value wall space 2 (if applicable) |       |
|  |[ ]  Ending R-value wall space 2 (if applicable) |       |
| **Prime Window or Patio Door** |[ ]  [NFRC](https://search.nfrc.org/search/Searchdefault.aspx) stickers or other verification of U-value for each window |  |
|  | [ ]  | Completed [Windows Worksheet](#WindowsWorksheet) 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** |[ ]  Copy of [ENERGY STAR® product list](https://www.energystar.gov/productfinder/product/certified-storm-windows/results) 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.) |  |
|  |[ ]  Completed [Windows Worksheet](#WindowsWorksheet) 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 pane). |  |
| **Exterior Insulated Door** |[ ]  Pre-existing door is an uninsulated or thermally substandard exterior door  |  |
|  | [ ]  | Documentation door is either [ENERGY STAR-Certified](https://www.energystar.gov/products/residential_windows_doors_and_skylights/key_product_criteria) or [NFRC-rated](https://search.nfrc.org/search/Searchdefault.aspx) and meets U-factor and solar heat gain co-efficient specifications listed in the [BPA Implementation Manual](https://www.bpa.gov/energy-and-services/efficiency/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** |[ ]  Pre-sealing CFM leakage (CFM at 50 Pa) |       |
|  |[ ]  Post-sealing CFM leakage (CFM at 50 Pa) |       |
|  |[ ]  Total square footage of the pressure zone tested and sealed |       |
|  |[ ]  Building volume |       |
|  |[ ]  Notes on mechanical ventilation requirement: *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.* |       |
| **Prescriptive Air Sealing** |[ ]  Square footage of area air sealed (attic and/or crawlspace) |       |
| **Door Sweep** |[ ]  If distributed ‘By Request’, documentation of request and/or mailing |  |
| **Clothes Washer – ENERGY STAR Front Load or Top Load** | [ ]  | 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** | [ ]  | 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** | [ ]  | Manufacturer and model number of installed unit is listed on [BPA’s HPWH Qualified Products List](https://www.bpa.gov/energy-and-services/efficiency/document-library) |  |
| **Unitary Heat Pump Water Heater – 50 gallon and above – Tier 3 or 4** |[ ]  Manufacturer and model number of installed unit is listed on [BPA’s HPWH Qualified Products List](https://www.bpa.gov/energy-and-services/efficiency/document-library) |  |
| **Ductless or Ducted Mini-Split Heat Pump(s) or Ductless Heat Pump (DHP) Conversion** | [ ]  | AHRI Certificate demonstrating unit meets or exceeds federal minimum efficiency |  |
| **Ducted Air Source Heat Pump Conversion (non-Variable Speed)** | [ ]  | AHRI Certificate documenting unit meets current federal minimum efficiency |  |
| **Variable Speed Heat Pump Conversion** | [ ]  | AHRI Certificate documenting unit meets current federal minimum efficiency |  |
|  |[ ]  HSPF2 Rating |       |
|  |[ ]  SEER2 Rating |       |
| **Variable Speed Heat Pump Upgrade** |[ ]  AHRI Certificate documenting unit meets current federal minimum efficiency |  |
|  |[ ]  HSPF2 Rating |       |
|  |[ ]  SEER2 Rating |       |
| **Packaged Terminal Heat Pump** | [ ]  | AHRI Certificate |  |
| **Prescriptive Duct Sealing** | [ ]  | Completed [Prescriptive Duct Sealing Form](https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/2308-Prescriptive-Duct-Sealing-Data-Collection-Tool.pdf) |  |
| **Duct insulation** | [ ]  | Post Insulation R-value |       |
| **Line Voltage Thermostat** | [ ]  | Manufacturer |       |
|  |[ ]  Model |       |
| **Communicating Line Voltage Thermostat** | [ ]  | Manufacturer |       |
|  |[ ]  Model |       |
| **Advanced Smart Thermostat (Direct Installed)** | [ ]  | Manufacturer and model number of installed unit is listed on [BPA’s Smart Thermostat Qualified Products List](https://www.bpa.gov/energy-and-services/efficiency/document-library) |  |
|  | [ ]  | Manufacturer |       |
|  | [ ]  | Model |       |
| **Commercial Connected Thermostat** *(Multifamily shared common areas only)* | [ ]  | Manufacturer |       |
|  |[ ]  Model |       |
| **Commercial Ductless Heat Pump Retrofit or Upgrade** *(Retrofit multifamily shared common areas only)* |[ ]  AHRI Certificate  |  |
| **Commercial Ducted Air Source Heat Pump Retrofit or Upgrade** *(Retrofit multifamily shared common areas only)* | [ ]  | 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** |       |       |       |       |       |       |       |
| **13** |       |       |       |       |       |       |       |
| **14** |       |       |       |       |       |       |       |
| **15** |       |       |       |       |       |       |       |
| **16** |       |       |       |       |       |       |       |
| **17** |       |       |       |       |       |       |       |
| **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**

**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 |

|  |  |  |  |
| --- | --- | --- | --- |
| 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: |
|[ ]  Gross income falls within 200% of the federal poverty line (see Table 2) |
|[ ]  Gross income meets your state’s income guidelines (if different) |
|[ ]  Gross income meets your tribe’s income guidelines (if different) |
|[ ]  LIHEAP |
|[ ]  HUD |
|[ ]  NAHASDA |
|[ ]  Section 8 |
|[ ]  TANF |
|[ ]  Supplemental Social Security |

**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 |[ ] [ ]
| Pay stub |[ ] [ ]
| IRS form 1040 |[ ] [ ]
| LIHEAP certification |[ ] [ ]
| HUD eligibility |[ ] [ ]
| NAHASDA eligibility |[ ] [ ]
| Section 8 eligibility |[ ] [ ]
| TANF eligibility |[ ] [ ]
| Supplemental Social Security |[ ] [ ]
| Proof of current assistance from state health and human services agency |[ ] [ ]
| Social Security Income |[ ] [ ]
| GA |[ ] [ ]
| VA |[ ] [ ]
| Unemployment |[ ] [ ]

**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, Enter First and Last name 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 Enter name of the serving electric utility. 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 eligibilityLIHEAP certificationHUD HousingSupplemental Social Security IncomeTANF* 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** |  |