



## Owner-Occupied Program Requirements

### Rebates, Loans and Grants

#### Qualifying owner-occupied projects must meet the following to be eligible for a rebate, loan or grant:

- Tacoma Power General Program Requirements (outlined below)
- Equipment and materials must be installed to program specifications

#### Conditions:

- Tacoma Power reserves the right to withdraw, modify or terminate this program at any time, without notice.
- Program requirements, product specifications and incentives are subject to change without notice
- Tacoma Power does not endorse any particular contractor, retailer, manufacturer or product.

## GENERAL PROGRAM REQUIREMENTS

### 1. PROPERTY MUST (all of the following):

- Be served by Tacoma Power
- Be an owner-occupied:
  - o Single family home
  - o Condo (up to 4 units/building)
- Have electric as primary source of existing heat (except for heat pump water heaters)

### 2. PROPERTY OWNER MUST (all of the following):

- Accept program Terms & Conditions by signing and submitting the [Owner-Occupied Application](#)
- Submit all required documents
- Receive pre-approval from Tacoma Power if applying for a loan or grant
- Receive pre-approval from Tacoma Power if you plan to do the installation yourself (DIY) or you select a contractor that is not an approved Tacoma Power Participating Contractor
- **Exception:** DIY installation of smart thermostats do not require pre-approval.

### 3. TACOMA POWER MAY:

- Conduct an inspection to verify products and installations

## ADDITIONAL REQUIREMENTS FOR PROGRAM SPECIFIC INCENTIVES

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### Quick Reference

Below are links to important sites online that are referenced in this document, along with a link to a glossary of key terms.

### Important links:

- [Ductless Heat Pumps BPA's DHP Qualified Product](#)
- [BPA list of Qualified Duct Sealing PTCS Technicians](#)
- [BPA Qualified Product List - Smart Thermostats](#)
- [Heat Pump Water Heater Qualified Products List](#)
- [Hot Water Solutions](#)
- [Tacoma Power Rebate Forms & Information](#)
- [Tacoma Power Zero Interest Loan](#)
- [Glossary of Terms](#)

## WEATHERIZATION (WINDOWS & INSULATION)

<b>Requirements</b>	<p><b>INELIGIBLE:</b></p> <ul style="list-style-type: none"> <li>– Manufactured homes</li> <li>– New construction</li> <li>– Homes undergoing major remodel are not eligible for insulation when building code requires it be added</li> <li>– If Tacoma Power paid for insulation in the past, not eligible to reinsulate in the same area(s)</li> </ul> <p><b>Requirements:</b></p> <ul style="list-style-type: none"> <li>– Project must meet the General Program Requirements listed on page 1</li> <li>– Project must meet Tacoma Power’s <a href="#">Weatherization Program Specifications</a></li> <li>– Home must have been built before 1988</li> </ul> <p><b>Weatherization incentives:</b></p> <ul style="list-style-type: none"> <li>– Attic insulation with prescriptive air sealing (when R11 or less exists)</li> <li>– Wall insulation (when no insulation exists)</li> <li>– Floor insulation with prescriptive air sealing and water pipe wrap (when no insulation exists)</li> <li>– Single pane, and double pane metal frame, window replacement</li> <li>– To qualify for window replacement, the home must meet Tacoma Power’s insulation levels (listed below):             <ul style="list-style-type: none"> <li>○ Attic insulation must have R12 rating or greater</li> <li>○ Walls must have some insulation</li> <li>○ Floor insulation must have R12 rating or greater</li> </ul> </li> </ul> <p><b>Required documentation:</b></p> <ul style="list-style-type: none"> <li>– Tacoma Power bid form signed by homeowner:             <ul style="list-style-type: none"> <li>○ <a href="#">Insulation</a></li> <li>○ <a href="#">Window</a></li> </ul> </li> <li>– Invoice that meets Tacoma Power’s Residential Customer <a href="#">Invoice Requirements</a></li> <li>– Copy of window permit (required in most jurisdictions) and window stickers or packing slip stating U-values</li> <li>– Insulation certificate identifying type, R-values and square footage</li> <li>– <a href="#">Knob &amp; Tube (K&amp;T) Wiring Inspection Report</a> completed and signed by a certified journeyman electrician (if applicable)</li> </ul>
Additional requirements for <b>LOANS</b>	<p><b>INELIGIBLE:</b> Limited Liability Companies (LLCs) and corporations; DIY projects</p> <p><b>Requirements:</b></p> <ul style="list-style-type: none"> <li>– Property owner must provide proof of ownership</li> <li>– For detailed requirements and credit information, visit: <a href="http://MyTPU.org/ZeroInterest">MyTPU.org/ZeroInterest</a></li> <li>– Contractor must have an active <a href="#">Trade Ally Agreement</a> with Tacoma Power</li> </ul>
Additional requirements for <b>GRANTS</b>	<p><b>INELIGIBLE:</b> DIY projects</p> <p>Household occupants must:</p> <ul style="list-style-type: none"> <li>○ Meet eligible <a href="#">income guidelines</a></li> <li>○ Complete and submit <a href="#">Grant Application</a></li> <li>○ Provide supporting documentation</li> </ul> <p>Contractor must have an active <a href="#">Trade Ally Agreement</a> with Tacoma Power</p>
Additional requirements for <b>DIY REBATES</b>	<ul style="list-style-type: none"> <li>– Rebate applies only to material costs, not labor</li> <li>– Copies of receipts or invoices must be submitted</li> <li>– Rebate amount cannot exceed the total cost of materials</li> </ul>

## CENTRAL HEAT PUMP (CURRENT HEAT: ELECTRIC FORCED AIR FURNACE)

<b>Requirements</b>	<p><b>INELIGIBLE:</b></p> <ul style="list-style-type: none"> <li>- New Construction</li> <li>- Homes that have previously participated in the Ductless Heat Pump (DHP) Program through Tacoma Power</li> <li>- Homes that have a DHP in the main living area of the home</li> <li>- Homes with an existing operable central heat pump</li> </ul> <hr/> <p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>- One rebate or loan per home</li> </ul> <hr/> <p><b>Requirements:</b></p> <ul style="list-style-type: none"> <li>- Project must meet General Program Requirements listed on page 1</li> <li>- Must meet Tacoma Power <a href="#">Central Heat Pump Specifications</a></li> <li>- Heat pump must:             <ul style="list-style-type: none"> <li>o Replace existing electric furnace</li> <li>o Have minimum 9.0 HSPF and 14 SEER ratings</li> <li>o Be installed by a <a href="#">PTCS certified technician</a></li> </ul> </li> <li>- Project must be approved and listed on the <a href="#">PTCS Online Site Registry</a></li> </ul> <hr/> <p><b>Required documentation:</b></p> <ul style="list-style-type: none"> <li>- Tacoma Power <a href="#">Heating and Cooling Bid Form</a>, <i>or</i> Contractor bid form that meets Tacoma Power's <a href="#">Heating and Cooling Bid Requirements</a>, signed by the homeowner</li> <li>- Invoice that meets Tacoma Power's Residential Customer <a href="#">Invoice Requirements</a></li> <li>- Copy of electrical and mechanical permits</li> <li>- AHRI certificate</li> <li>- <a href="#">PTCS Air Source Heat Pump form</a></li> <li>- Copy of BPA PTCS Heat Pump printout from the online registry showing project number and status as "BPA Approved"</li> <li>- Heat pump sizing form and balance point worksheet</li> </ul>
Additional requirements for <b>LOANS</b>	<p><b>INELIGIBLE:</b></p> <ul style="list-style-type: none"> <li>- Limited Liability Companies (LLCs) and corporations</li> <li>- DIY projects</li> </ul> <hr/> <p><b>Requirements:</b></p> <ul style="list-style-type: none"> <li>- Property owner must provide proof of ownership             <ul style="list-style-type: none"> <li>o For detailed requirements and credit information, please visit: <a href="http://MyTPU.org/ZerolInterest">MyTPU.org/ZerolInterest</a></li> </ul> </li> <li>- Contractor must have an active <a href="#">Trade Ally Agreement</a> with Tacoma Power</li> </ul>
Additional requirements for <b>DIY REBATES</b>	<ul style="list-style-type: none"> <li>- Rebate applies to material costs only, not labor</li> <li>- Copies of receipts or invoices must be submitted</li> <li>- Rebate amount cannot exceed the total cost of materials</li> </ul>

## DUCTLESS HEAT PUMPS (DHP)

<b>Requirements</b>	<p><b>INELIGIBLE:</b></p> <ul style="list-style-type: none"> <li>- New construction</li> </ul>
	<p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>- One rebate or loan per home</li> </ul>
	<p><b>Requirements:</b></p> <ul style="list-style-type: none"> <li>- Project must meet General Program Requirements listed on page 1</li> <li>- Project must meet Tacoma Power’s <a href="#">Ductless Heat Pump (DHP) Specifications</a></li> <li>- DHP must:                             <ul style="list-style-type: none"> <li>o Have minimum 9.0 HSPF and 14 SEER ratings</li> <li>o Be listed on the <a href="#">BPA Qualified Products List (QPL)</a></li> <li>o Be installed by a manufacturer certified, trained technician listed on <a href="http://goingductless.com">goingductless.com</a>.</li> <li>o Requires one indoor unit be installed in main living area</li> </ul> </li> </ul>
	<p><b>Required documentation:</b></p> <ul style="list-style-type: none"> <li>- Tacoma Power <a href="#">Heating and Cooling Bid Form</a>, <i>or</i> Contractor bid form that meets Tacoma Power’s <a href="#">Heating and Cooling Bid Requirements</a>, signed by the homeowner</li> <li>- Invoice that meets Tacoma Power’s Residential Customer <a href="#">Invoice Requirements</a></li> <li>- Copy of electrical and mechanical permits</li> <li>- AHRI certificate</li> </ul>
Additional requirements for <b>LOANS</b>	<p><b>INELIGIBLE:</b></p> <ul style="list-style-type: none"> <li>- Limited Liability Companies (LLCs) and corporations</li> <li>- DIY projects</li> </ul>
	<p><b>Requirements:</b></p> <ul style="list-style-type: none"> <li>- Property owner must provide proof of ownership</li> <li>- For detailed requirements and credit, please visit: <a href="http://MyTPU.org/ZeroInterest">MyTPU.org/ZeroInterest</a></li> <li>- Contractor must have an active <a href="#">Trade Ally Agreement</a> with Tacoma Power</li> </ul>
Additional requirements for <b>DIY REBATES</b>	<ul style="list-style-type: none"> <li>- Rebate applies only to material costs, not labor</li> <li>- Copies of receipts or invoices must be submitted</li> <li>- Rebate amount cannot exceed the total cost of materials</li> </ul>

## DUCT SEALING

### Requirements

#### **INELIGIBLE:**

- New construction
- Homes with ducts that have been previously sealed through the Performance Tested Comfort Systems (PTCS) or BPA's Prescriptive Duct Sealing program, **unless** Tacoma Power has approved additional duct sealing
- DIY projects

#### **Requirements:**

- Project must meet General Program Requirements listed on page 1
- Project must meet Tacoma Power's [Prescriptive Duct Sealing Specifications](#)
- The home's heating system must be either an existing electric forced air furnace or a central heat pump

#### **Technician Requirements:**

- Installation done by a certified [PTCS technician](#)
- The certified technician must enter the PTCS information into the [BPA online registry](#).

#### **Required documentation:**

- Invoice that meets Tacoma Power's Residential Customer [Invoice Requirements](#)
- Completed [Prescriptive Duct Sealing](#) form
- Copy of BPA PTCS Prescriptive Duct Seal printout from the online registry showing project number and status as, "BPA Approved"

## HEAT PUMP WATER HEATER (HPWH)

<b>Requirements</b>	<p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>- One rebate per home</li> </ul>
	<p><b>Requirements:</b></p> <ul style="list-style-type: none"> <li>- Project must meet General Program Requirements listed on page 1</li> <li>- Project must meet Tacoma Power's <a href="#">Heat Pump Water Heater Program specifications</a></li> <li>- Product must be a Tier 3 HPWH listed on the <a href="#">BPA Qualified Products List</a></li> <li>- Current water heater must be electric</li> <li>- HPWH must be installed according to the manufacturer's specifications</li> <li>- All required permits must be acquired</li> </ul>
	<p><b>Required documentation:</b></p> <ul style="list-style-type: none"> <li>- Invoice or receipt showing HPWH brand, model, model number, cost and date of purchase</li> </ul>
<p>Additional requirements for <b>DIY REBATES</b></p>	<ul style="list-style-type: none"> <li>- Rebate applies only to material costs, not labor</li> </ul>

## SMART THERMOSTAT

<b>sRequirements</b>	<p><b>INELIGIBLE:</b></p> <ul style="list-style-type: none"> <li>- Thermostats that control cooling only systems or dual fuel heating systems (gas furnace with electric heat pump)</li> </ul>
	<p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>- One Smart Thermostat per heating system (maximum of 2 rebates per home)</li> </ul>
	<p><b>Requirements:</b></p> <ul style="list-style-type: none"> <li>- Project must meet Tacoma Power's <a href="#">Smart Thermostat Specifications</a></li> <li>- The home's heating system must be either an existing electric forced air furnace <b>or</b> a central heat pump</li> <li>- Thermostat must be listed on <a href="#">BPA's Smart Thermostat Qualified Products list</a></li> <li>- Smart Thermostat must include the following features: <ul style="list-style-type: none"> <li>o 7-day programmable or learning-based scheduling</li> <li>o Wi-Fi enabled with remote access</li> <li>o Occupancy detection</li> <li>o For heat pumps: auxiliary heat control/optimization</li> </ul> </li> </ul>
	<p><b>Required documentation:</b></p> <ul style="list-style-type: none"> <li>- Completed <a href="#">Smart Thermostat Application</a></li> <li>- Invoice/receipt showing purchase date, manufacturer, model number</li> </ul>
<p>Additional Requirements for <b>DIY Rebates</b></p>	<ul style="list-style-type: none"> <li>- Rebate applies to material costs only, not labor</li> </ul>