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:
     - Single family home
     - 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)

**INELIGIBLE:**
- Manufactured homes
- New construction
- Homes undergoing major remodel are not eligible for insulation when building code requires it be added
- If Tacoma Power paid for insulation in the past, not eligible to reinsulate in the same area(s)

**Requirements:**
- Project must meet the General Program Requirements listed on page 1
- Project must meet Tacoma Power’s Weatherization Program Specifications
- Home must have been built before 1988

**Weatherization incentives:**
- Attic insulation with prescriptive air sealing (when R11 or less exists)
- Wall insulation (when no insulation exists)
- Floor insulation with prescriptive air sealing and water pipe wrap (when no insulation exists)
- Single pane, and double pane metal frame, window replacement
- To qualify for window replacement, the home must meet Tacoma Power’s insulation levels (listed below):
  - Attic insulation must have R12 rating or greater
  - Walls must have some insulation
  - Floor insulation must have R12 rating or greater

**Required documentation:**
- Tacoma Power bid form signed by homeowner:
  - Insulation
  - Window
- Invoice that meets Tacoma Power’s Residential Customer Invoice Requirements
- Copy of window permit (required in most jurisdictions) and window stickers or packing slip stating U-values
- Insulation certificate identifying type, R-values and square footage
- Knob & Tube (K&T) Wiring Inspection Report completed and signed by a certified journeyman electrician (if applicable)

**INELIGIBLE:** Limited Liability Companies (LLCs) and corporations; DIY projects

**Requirements:**
- Property owner must provide proof of ownership
- For detailed requirements and credit information, visit: MyTPU.org/ZeroInterest
- Contractor must have an active Trade Ally Agreement with Tacoma Power

**Additional requirements for LOANS**

**INELIGIBLE:** DIY projects

**Requirements:**
- Household occupants must:
  - Meet eligible income guidelines
  - Complete and submit Grant Application
  - Provide supporting documentation
- Contractor must have an active Trade Ally Agreement with Tacoma Power

**Additional requirements for GRANTS**

**Additional requirements for DIY REBATES**

- Rebate applies only to material costs, not labor
- Copies of receipts or invoices must be submitted
- Rebate amount cannot exceed the total cost of materials
### CENTRAL HEAT PUMP (CURRENT HEAT: ELECTRIC FORCED AIR FURNACE)

**Requirements**

**INELIGIBLE:**
- New Construction
- Homes that have previously participated in the Ductless Heat Pump (DHP) Program through Tacoma Power
- Homes that have a DHP in the main living area of the home
- Homes with an existing operable central heat pump

**Limitations:**
- One rebate or loan per home

**Requirements:**
- Project must meet General Program Requirements listed on page 1
- Must meet Tacoma Power [Central Heat Pump Specifications](#)
- Heat pump must:
  - Replace existing electric furnace
  - Have minimum 9.0 HSPF and 14 SEER ratings
  - Be installed by a [PTCS certified technician](#)
- Project must be approved and listed on the [PTCS Online Site Registry](#)

**Required documentation:**
- Tacoma Power [Heating and Cooling Bid Form](#) or Contractor bid form that meets Tacoma Power’s [Heating and Cooling Bid Requirements](#), signed by the homeowner
- Invoice that meets Tacoma Power’s Residential Customer [Invoice Requirements](#)
- Copy of electrical and mechanical permits
- AHRI certificate
- [PTCS Air Source Heat Pump form](#)
- Copy of BPA PTCS Heat Pump printout from the online registry showing project number and status as “BPA Approved”
- Heat pump sizing form and balance point worksheet

### Additional requirements for LOANS

**INELIGIBLE:**
- Limited Liability Companies (LLCs) and corporations
- DIY projects

**Requirements:**
- Property owner must provide proof of ownership
  - For detailed requirements and credit information, please visit: [MyTPU.org/ZeroInterest](#)
- Contractor must have an active [Trade Ally Agreement](#) with TacomaPower

### Additional requirements for DIY REBATES

- Rebate applies to material costs only, not labor
- Copies of receipts or invoices must be submitted
- Rebate amount cannot exceed the total cost of materials
# DUCTLESS HEAT PUMPS (DHP)

## Requirements

**INELIGIBLE:**
- New construction

**Limitations:**
- One rebate or loan per home

**Requirements:**
- Project must meet General Program Requirements listed on page 1
- Project must meet Tacoma Power's Ductless Heat Pump (DHP) Specifications
- DHP must:
  - Have minimum 9.0 HSPF and 14 SEER ratings
  - Be listed on the BPA Qualified Products List (QPL)
  - Be installed by a manufacturer certified, trained technician listed on goingductless.com.
  - Requires one indoor unit be installed in main living area

**Required documentation:**
- Tacoma Power Heating and Cooling Bid Form, or Contractor bid form that meets Tacoma Power’s Heating and Cooling Bid Requirements, signed by the homeowner
- Invoice that meets Tacoma Power’s Residential Customer Invoice Requirements
- Copy of electrical and mechanical permits
- AHRI certificate

## Additional requirements for LOANS

**INELIGIBLE:**
- Limited Liability Companies (LLCs) and corporations
- DIY projects

**Requirements:**
- Property owner must provide proof of ownership
- For detailed requirements and credit, please visit: MyTPU.org/ZeroInterest
- Contractor must have an active Trade Ally Agreement with Tacoma Power

## Additional requirements for DIY REBATES

- Rebate applies only to material costs, not labor
- Copies of receipts or invoices must be submitted
- Rebate amount cannot exceed the total cost of materials
<table>
<thead>
<tr>
<th>Requirements</th>
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<tbody>
<tr>
<td><strong>INELIGIBLE:</strong></td>
</tr>
<tr>
<td>- New construction</td>
</tr>
<tr>
<td>- Homes with ducts that have been previously sealed through the Performance Tested Comfort Systems (PTCS) or BPA’s Prescriptive Duct Sealing program, <strong>unless</strong> Tacoma Power has approved additional duct sealing</td>
</tr>
<tr>
<td>- DIY projects</td>
</tr>
<tr>
<td><strong>Requirements:</strong></td>
</tr>
<tr>
<td>- Project must meet General Program Requirements listed on page 1</td>
</tr>
<tr>
<td>- Project must meet Tacoma Power’s <a href="#">Prescriptive Duct Sealing Specifications</a></td>
</tr>
<tr>
<td>- The home’s heating system must be either an existing electric forced air furnace or a central heat pump</td>
</tr>
<tr>
<td><strong>Technician Requirements:</strong></td>
</tr>
<tr>
<td>- Installation done by a certified <a href="#">PTCS technician</a></td>
</tr>
<tr>
<td>- The certified technician must enter the PTCS information into the <a href="#">BPA online registry</a></td>
</tr>
<tr>
<td><strong>Required documentation:</strong></td>
</tr>
<tr>
<td>- Invoice that meets Tacoma Power’s Residential Customer <a href="#">Invoice Requirements</a></td>
</tr>
<tr>
<td>- Completed <a href="#">Prescriptive Duct Sealing form</a></td>
</tr>
<tr>
<td>- Copy of BPA PTCS Prescriptive Duct Seal printout from the online registry showing project number and status as, “BPA Approved”</td>
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</table>
### HEAT PUMP WATER HEATER (HPWH)

<table>
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<tr>
<th>Requirements</th>
<th>Limitations:</th>
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<tr>
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<td>– One rebate per home</td>
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<tr>
<th>Requirements</th>
<th>Requirements:</th>
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<tbody>
<tr>
<td></td>
<td>– Project must meet General Program Requirements listed on page 1</td>
</tr>
<tr>
<td></td>
<td>– Project must meet Tacoma Power’s Heat Pump Water Heater Program specifications</td>
</tr>
<tr>
<td></td>
<td>– Product must be a Tier 3 HPWH listed on the BPA Qualified Products List</td>
</tr>
<tr>
<td></td>
<td>– Current water heater must be electric</td>
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<tr>
<td></td>
<td>– HPWH must be installed according to the manufacturer’s specifications</td>
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<td>– All required permits must be acquired</td>
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<table>
<thead>
<tr>
<th>Required documentation:</th>
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</thead>
<tbody>
<tr>
<td>– Invoice or receipt showing HPWH brand, model, model number, cost and date of purchase</td>
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</table>

<table>
<thead>
<tr>
<th>Additional requirements for DIY REBATES</th>
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<tbody>
<tr>
<td>– Rebate applies only to material costs, not labor</td>
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</table>
## SMART THERMOSTAT

<table>
<thead>
<tr>
<th><strong>sRequirements</strong></th>
<th><strong>INELIGIBLE:</strong></th>
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<tbody>
<tr>
<td></td>
<td>- Thermostats that control cooling only systems or dual fuel heating systems (gas furnace with electric heat pump)</td>
</tr>
</tbody>
</table>

| Limitations: |
| - One Smart Thermostat per heating system (maximum of 2 rebates per home) |

| Requirements: |
| - Project must meet Tacoma Power’s [Smart Thermostat Specifications](#) |
| - The home’s heating system must be either an existing electric forced air furnace or a central heat pump |
| - Thermostat must be listed on [BPA’s Smart Thermostat Qualified Products list](#) |
| - Smart Thermostat must include the following features: |
|   - 7-day programmable or learning-based scheduling |
|   - Wi-Fi enabled with remote access |
|   - Occupancy detection |
|   - For heat pumps: auxiliary heat control/optimization |

| Required documentation: |
| - Completed [Smart Thermostat Application](#) |
| - Invoice/receipt showing purchase date, manufacturer, model number |

| Additional Requirements for DIY Rebates |
| - Rebate applies to material costs only, not labor |