

# Owner-Occupied Documents Checklist

## LOANS & GRANTS

**PRE-APPROVAL REMINDER:** All loan and grant applications must be pre-approved by Tacoma Power before work begins.

BEFORE WORK BEGINS	LOAN			GRANT
	Heating (CHP, DHP)	Weatherization		Weatherization Windows and/or Insulation
		Windows	Insulation	
<b>Owner-Occupied Application</b> • Sign and date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Assignment of Funds form</b> • Signed by owner and Tacoma Power Participating Contractor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Bid(s)</b> • Signed by owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Statutory Warranty Deed</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Knob &amp; Tube Inspection Report</b>			<input type="checkbox"/>	
<b>Grant Application (Attachment A)</b> • Signed by owner • Include applicable required documentation (proof of income, declaration of zero or unreported income, picture ID, birth certificate(s), etc.)				<input type="checkbox"/>
<b>AFTER WORK IS COMPLETED (submitted by contractor)</b>				
<b>Invoice for work</b> • See invoice requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Completed PTCS Air Source Heat Pump form</b>	<input type="checkbox"/> CHP only			
<b>Heat pump sizing and balance point calculations</b>	<input type="checkbox"/> CHP only			
<b>BPA approved PTCS form</b> • Print copy from online registration	<input type="checkbox"/> CHP only			
<b>Mechanical permit</b>	<input type="checkbox"/>			
<b>Electrical permit</b>	<input type="checkbox"/>			
<b>AHRI certificate</b>	<input type="checkbox"/>			
<b>Insulation certificate</b>			<input type="checkbox"/>	
<b>Window permit (where required)</b>		<input type="checkbox"/>		
<b>Window shipping slip</b>		<input type="checkbox"/>		