

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	
Owner-Occupied Application • Sign and date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assignment of Funds form • Signed by owner and Tacoma Power participating contractor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bid(s) • Signed by owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Statutory Warranty Deed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Knob & Tube Inspection Report			<input type="checkbox"/>	
Grant Application (Attachment A) • 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"/>
AFTER WORK IS COMPLETED (submitted by contractor)				
Invoice for work • See invoice requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completed PTCS Air Source Heat Pump form	<input type="checkbox"/> CHP only			
Heat pump sizing and balance point calculations	<input type="checkbox"/> CHP only			
BPA approved PTCS form • Print copy from online registration	<input type="checkbox"/> CHP only			
Mechanical permit	<input type="checkbox"/>			
Electrical permit	<input type="checkbox"/>			
AHRI certificate	<input type="checkbox"/>			
Insulation certificate			<input type="checkbox"/>	
Window permit (where required)		<input type="checkbox"/>		
Window shipping slip		<input type="checkbox"/>		