



WELCOME

2022 RESIDENTIAL LOW INCOME VALIDATION PRESENTATION

JANUARY 31, 2022

Carl Brown

AGENDA



LOW INCOME VERIFICATION



The Energy Efficiency programs Oncor manages are regulated by the Public Utility Commission of Texas (PUCT).

- In 2021 the PUCT reviewed the existing guidelines, forms and processes utilities use to verify household income eligibility for customers wanting to participate in any of the Low-Income programs.
- As a result the PUCT as made several changes to these guidelines, forms and processes that the utility can use to verify and qualify household income for participation in Low-Income programs.

NEW INCOME VERIFICATION FORMS

Low-Income Program

Low-Income Weatherization program introduces four (4) new income verification categories on the new forms that are now required.

- Single-Family (four or less units or owner-occupied)
- Multifamily Apartment Complex (five or more units)
 - Tenant Household Income Determination Worksheet
- Service providers **MUST NOT** use any Income forms from 2021

SINGLE-FAMILY FOUR OR LESS UNITS OR OWNER-OCCUPIED



Single-Family (four or less units or owner-occupied)
Income Eligibility for Full-Incentive Energy Efficiency Services

This statement is made to verify my household income eligibility. The Public Utility Commission of Texas has authorized energy efficiency programs to reduce the utility bills of income-eligible households. Contractors participating in the programs receive higher incentive payments when you are income-eligible. The purpose of the higher payment is to enable the contractor to provide the improvements at a very low cost or no cost to you. **Participating in this program will not affect your eligibility for other program benefits listed below.**

The information provided below will be used solely for the purpose of determining household eligibility and will be kept confidential by the investor-owned utility contractor or other representative and by the Public Utility Commission of Texas and their contractor. It will not be sold or provided to any other party.

Name	
Street Address	Apartment Number
City	State TX Zip Code
Phone Number with Area Code () -	Number of Persons in Household

Category 1A: Eligible through other programs or services

At least one member of my household receive benefits from one or more of the programs listed below (check all that applies, **digital or paper copy of proof of participation such as award letter required with this form**):

<input type="checkbox"/> Bureau of Indian Affairs (BIA) General Assistance	<input type="checkbox"/> Supplemental Nutrition Assistance Program (SNAP) (Food Stamps)
<input type="checkbox"/> Federal Public Housing Assistance (FPHA)	<input type="checkbox"/> Supplemental Security Income (SSI)
<input type="checkbox"/> Food Distribution Program on Indian Reservations (FDPIR)	<input type="checkbox"/> Temporary Assistance for Needy Families (TANF)
<input type="checkbox"/> Health Benefit Coverage under Child Health Plan (CHIP)	<input type="checkbox"/> Texas Lifeline Discount
<input type="checkbox"/> Low-Income Energy Assistance Program (LIHEAP) or Comprehensive Energy Assistance Program (CEAP)	<input type="checkbox"/> Tribal Head Start (only households that meet the income-qualifying standard)
<input type="checkbox"/> Medicaid (includes CHIP)	<input type="checkbox"/> Tribal Temporary Assistance for Needy Families (Tribal TANF)
<input type="checkbox"/> Medicare, Qualified Beneficiary	<input type="checkbox"/> Veterans Pension Benefit or Survivors Pension Benefit
<input type="checkbox"/> National School Lunch Program—Free Lunch Program	<input type="checkbox"/> Veterans Pension or Survivors Benefit Programs
<input type="checkbox"/> Section 8 Housing Voucher	

Your signature is required on the last page of this form.

Category 1B: Eligible through community action or social service agency
(COMPLETED BY UTILITY, COMMUNITY ACTION, OR SOCIAL SERVICE AGENCY)

I certify the named household participates in one of the programs in Category 1A or other low-income program service for which our agency qualifies participation.

Agency Name	Contact Name	Contact Phone Number with Area Code () -
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Category 1C: Eligible through geographic location
(COMPLETED BY UTILITY OR THEIR REPRESENTATIVE OR PROVIDER)

check box if applicable

Housing and Urban Development (HUD) Low-Income Housing-Qualified Census Tract or Block

Single-Family (four or less units or owner-occupied)
Income Eligibility for Full-Incentive Energy Efficiency Services

Category 2: Eligible through income verification (Do Not Complete if 1A, 1B, or 1C completed above)

Instructions: To accurately determine your **household income** you must include the income of all persons residing in your home from all sources. To determine the amount of income in each category, enter the amount(s) on the check or benefit statement. Supporting documentation must be provided (all personal identifying information may be redacted except name and address).

STEP 1: Fill out the Income Calculation table below.
Amounts listed are shown (check one): Annually Monthly Weekly

Source of income	Amount (\$)
Wages from full- or part-time employment as shown on a paystub or W-2 form	
Unemployment or worker's compensation	
Social security	
Retirement income	
Child support or alimony	
All other earnings	
Total household income <i>(add the amount entered on each line to figure your total household income)</i>	\$0.00

STEP 2: Compare your total household income per week, month, or year to the amount shown in the table below for the number of persons in your household.
If your total household income is equal to or less than the amount shown in the table, you are income-eligible.

200 Percent of Health and Human Services (HHS) Poverty Guidelines—to be updated

Size of family unit	Annual income	Monthly income	Weekly income
1	\$ 25,520	\$ 2,127	\$ 491
2	\$ 34,480	\$ 2,873	\$ 663
3	\$ 43,440	\$ 3,620	\$ 835
4	\$ 52,400	\$ 4,367	\$ 1,008
5	\$ 61,360	\$ 5,113	\$ 1,180
6	\$ 70,320	\$ 5,860	\$ 1,352
7	\$ 79,280	\$ 6,607	\$ 1,525
8	\$ 88,240	\$ 7,353	\$ 1,697
Each additional person, add:	\$ 8,960	\$ 747	\$ 172

* Notice: Income ceilings are for February 1, 2022—January 31, 2023.
Annual updates are posted on <http://www.puc.texas.gov/industry/electric/forms/>

SIGN BELOW: I certify that the above information and declaration are true and correct. I understand that the information is subject to audit and investigation by the investor-owned utility or representative providing the program services.

Applicant Signature	Date
Contractor Signature	Date

Keep a copy of this form for your records.

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MULTIFAMILY APARTMENT COMPLEX (5 OR MORE UNITS)



Multifamily Apartment Complex (five or more units) Income Eligibility for Full-Incentive Energy Efficiency Services

This form is to verify that at least 75 percent of the units are rented by income-eligible customers. The Public Utility Commission of Texas has authorized energy efficiency programs to reduce the utility bills of income-eligible tenant households. Contractors participating in the programs receive higher incentive payments when at least 75 percent of the tenants qualify as income-eligible. **One form must be filled out for each qualifying multifamily apartment complex.**

The information provided below will be used solely for the purpose of determining household eligibility and will be kept confidential by the investor-owned utility contractor or other representative and by the Public Utility Commission of Texas and their contractor. It will not be sold or provided to any other party.

Name of Applicant (Property Owner or Agent)		Name of Property Owner	
Name of Multifamily Apartment Complex		Number of Units in Complex	
Name of Management Company		Name of On-Site Property Manager	
Complex Street Address		State Number	
City		State TX	Zip Code
Property Owner or Agent's Phone Number with Area Code () -		Fax Number with Area Code () -	
Management Company's Phone Number with Area Code () -		Fax Number with Area Code () -	

Category 1A: Eligible through other programs or services

The multifamily apartment complex qualifies in one or more of the programs listed below (check all that apply, **digital or paper copy of proof of participation such as the land use restriction agreement required with this form**):

- | | |
|---|---|
| <input type="checkbox"/> Affordable Housing Disposition Program | <input type="checkbox"/> Project-Based Section 8 |
| <input type="checkbox"/> HOME Rental Housing Development | <input type="checkbox"/> Rural Rental Section 515 (FMHA) |
| <input type="checkbox"/> Low-Income Housing Tax Credit Program
(with less than 25 percent of units at market rate) | <input type="checkbox"/> Section 811 Project Rental Assistance Program |
| <input type="checkbox"/> Multifamily Bond Program
(with less than 25 percent of units at market rate) | <input type="checkbox"/> Texas Housing Trust Fund |
| <input type="checkbox"/> Public Housing Authority
(Texas Housing Association) | <input type="checkbox"/> Other Income-Qualifying Housing Program
Program Name: |

Category 1B: Eligible through community action or social service agency (COMPLETED BY UTILITY, COMMUNITY ACTION, OR SOCIAL SERVICE AGENCY)

I certify the named multifamily complex or 75 percent or more of tenants participate in one of the programs in Category 1A or other low-income program service, which our agency qualifies participation.

Agency Name	Contact Name	Contact Phone Number with Area Code () -
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Category 1C: Eligible through geographic location (COMPLETED BY UTILITY OR THEIR REPRESENTATIVE OR PROVIDER)

(check box if applies):

- Housing and Urban Development (HUD) Low-Income Housing-Qualified Census Tract or Block

Multifamily Apartment Complex (five or more units) Income Eligibility for Full-Incentive Energy Efficiency Services

Category 2: Eligible through income verification (Do Not Complete if 1A, 1B or 1C completed above)

For Apartment Complex to be eligible, at least 75 percent of the tenant household incomes before taxes are at or below 200 percent of the federal poverty guidelines.

STEP 1: Fill out the Apartment Complex Income Calculation Worksheet. (Excel or hard copy must be include with this form)

To accurately determine tenant **household income**, you may use the tenant rental application showing the number of individuals residing in the unit and the household income dated from within the past 18 months. If the rental application does not show the required information or the information is over 18 months old, then the tenant(s) must complete the **Single-Family Income Eligibility for Full-Incentive Energy Efficiency Services form**. Supporting documentation for each unit must be available for utility audit.

STEP 2: Compare the tenant's total household income per week, month, or year to the amount shown in the table below for the number of persons residing in the unit. If the total household income is equal to or less than the amount shown in the table, the unit is income-eligible for the full incentive. If the unit is not income-eligible, the unit is eligible for the residential incentive level.

200 Percent of Health and Human Services (HHS) Poverty Guidelines—to be updated

Size of family unit	Annual income	Monthly income	Weekly income
1	\$ 25,520	\$ 2,127	\$ 491
2	\$ 34,480	\$ 2,873	\$ 663
3	\$ 43,440	\$ 3,620	\$ 835
4	\$ 52,400	\$ 4,367	\$ 1,008
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6	\$ 70,320	\$ 5,860	\$ 1,352
7	\$ 79,280	\$ 6,607	\$ 1,525
8	\$ 88,240	\$ 7,353	\$ 1,697
Each additional person, add:	\$ 8,960	\$ 747	\$ 172

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Annual updates are posted on <http://www.puc.texas.gov/industry/electric/forms/>

STEP 3: Fill out the Apartment Complex Income Calculation SUMMARY below

Apartment Complex Income Calculation Summary	Number of units
Number of income-eligible units	
Number of non-income-eligible units, including vacant units	
Total number of units	
Percentage of income-eligible units (income-eligible units divided by the total number of units)	%

STEP 4: If "Percentage of income-eligible units" (calculated above) is 75 percent or higher, please certify the eligibility of the Apartment Complex with your signature below.

I certify that the above information and declaration are true and correct. I understand that the information is subject to audit and investigation by the investor-owned utility or representative providing the program services.

Applicant Signature (Property Owner or Agent)	Date
Contractor Signature	Date

Keep a copy of this form for your records.

MULTIFAMILY APARTMENT COMPLEX WORKSHEET (5 OR MORE UNITS)



Verification Date:	10/15/2019				% Qualified=	96.3%
# of Units:	80					
# Qualified:	77					

Public Utility Commission of Texas

Tenant Household Income Determination Worksheet

Instructions: This worksheet must be completed if you check Category 2 on page one of the application. The household and income information must be from within the last 18 months. You may make copies of [or add additional rows to] the worksheet if there are more than 40 units in the multi-family property.

Apartment #	Household Size	Date of Income Verification	Household Income		Self Certification Category 1 (Y/N)	Eligible (Y/N)
			\$	per		
211	3	10/14/2019	\$16,605	year	N	Y
212	2	9/1/2019	\$19,417	year	N	Y
213	1	7/13/2019	\$8,328	year	N	Y
214	4	9/10/2019	\$24,600	year	N	Y
215	2	8/1/2019	\$21,744	year	N	Y
216	1	4/30/2019	\$10,332	year	N	Y
217	1	6/1/2019	\$13,393	year	N	Y
218	2	10/1/2019	\$17,676	year	N	Y
221	4	4/1/2019	\$12,324	year	N	Y
222	2	9/1/2019	\$10,771	year	N	Y
223	2	11/21/2019	\$14,724	year	N	Y
224	3	10/17/2019	\$12,674	year	N	Y
225	3	2/11/2019	\$25,632	year	N	Y
226	1	7/14/2019	\$13,543	year	N	Y
227	1	7/9/2019	\$19,061	year	N	Y
228	2	9/1/2019	\$22,397	year	N	Y
232	2	2/1/2019	\$9,252	year	N	Y
233	1	9/1/2019	\$7,895	year	N	Y
236	2	7/1/2019	\$10,443	year	N	Y
237	4	3/4/2019	\$41,086	year	N	Y
311	3	6/8/2019	\$0	year	N	Y
312	2	7/10/2019	\$19,460	year	N	Y
313	2	12/3/2018	\$11,658	year	N	Y
314	3	10/2/2019	\$23,462	year	N	Y
315	1	10/3/2019	\$10,779	year	N	Y
316	2	3/20/2019	\$19,342	year	N	Y
317	2	3/27/2019	\$7,704	year	N	Y
318	2	2/28/2019	\$16,120	year	N	Y
321	2	1/1/2018	\$5,616	year	N	Y
322	1	6/4/2019	\$8,893	year	N	Y

INCOME CATEGORIES



Category 1A: Eligible through other programs or services

Category 1A: Eligible through other programs or services	
The multifamily apartment complex qualifies in one or more of the programs listed below (<input checked="" type="checkbox"/> check all that apply, digital or paper copy of proof of participation such as the land use restriction agreement required with this form):	
<input type="checkbox"/> Affordable Housing Disposition Program	<input type="checkbox"/> Project-Based Section 8
<input type="checkbox"/> HOME Rental Housing Development	<input type="checkbox"/> Rural Rental Section 515 (FMHA)
<input type="checkbox"/> Low-Income Housing Tax Credit Program (with less than 25 percent of units at market rate)	<input type="checkbox"/> Section 811 Project Rental Assistance Program
<input type="checkbox"/> Multifamily Bond Program (with less than 25 percent of units at market rate)	<input type="checkbox"/> Texas Housing Trust Fund
<input type="checkbox"/> Public Housing Authority (Texas Housing Association)	<input type="checkbox"/> Other Income-Qualifying Housing Program Program Name:

- Documentation: Verify LIW form is completed and supporting program documentation was provided – Signature is required on the last page of this form - Form(s) uploaded in EEPM.

INCOME CATEGORIES (cont.)



Category 1B: Eligible through community action or social service agency

(COMPLETED BY UTILITY, COMMUNITY ACTION, OR SOCIAL SERVICE AGENCY)

Category 1B: Eligible through community action or social service agency (COMPLETED BY UTILITY, COMMUNITY ACTION, OR SOCIAL SERVICE AGENCY)		
I certify the named multifamily complex or 75 percent or more of tenants participate in one of the programs in Category 1A or other low-income program service, which our agency qualifies participation.		
Agency Name	Contact Name	Contact Phone Number with Area Code () -

- Documentation: Verify form is completed and signed by social service or community action agency – Signature is required on the last page of this form - Form(s) uploaded in EEPM.

INCOME CATEGORIES (cont.)



Category 1C: Eligible through geographic location (COMPLETED BY UTILITY OR THEIR REPRESENTATIVE OR PROVIDER)

Category 1C: Eligible through geographic location (COMPLETED BY UTILITY OR THEIR REPRESENTATIVE OR PROVIDER)
(<input checked="" type="checkbox"/> check box if applies):
<input type="checkbox"/> Housing and Urban Development (HUD) Low-Income Housing-Qualified Census Tract or Block

- Documentation: Verify address of serviced home is within one of the two qualifying geographic designations – NO Signature is Required - Certification from on-line tool uploaded in EEPM.

INCOME CATEGORIES

Single Family Form (cont.)



Category 2: Eligible through income verification (Do Not Complete if 1A, 1B, or 1C)

STEP 1: Fill out the Income Calculation table below.
 Amounts listed are shown (check one): Annually Monthly Weekly

Source of income	Amount (\$)
Wages from full- or part-time employment as shown on a paystub or W-2 form	
Unemployment or worker's compensation	
Social security	
Retirement income	
Child support or alimony	
All other earnings	
Total household income <i>(add the amount entered on each line to figure your total household income)</i>	\$0.00

STEP 2: Compare your total household income per week, month, or year to the amount shown in the table below for the number of persons in your household.
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 Annual updates are posted on <http://www.puc.texas.gov/industry/electric/forms/>

- Documentation: Verify form is completed and supporting income information was submitted to service provider/landlord/property manager – Signature is required - uploaded in EEPM.

INCOME CATEGORIES

Multifamily Form (cont.)



Category 2: Eligible through income verification (Do Not Complete if 1A, 1B, or 1C)

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STEP 3: Fill out the Apartment Complex Income Calculation SUMMARY below

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Number of income-eligible units	
Number of non-income-eligible units, including vacant units	
Total number of units	
Percentage of income-eligible units (income-eligible units divided by the total number of units)	%

STEP 4: If "Percentage of income-eligible units" (calculated above) is 75 percent or higher, please certify the eligibility of the Apartment Complex with your signature below.

I certify that the above information and declaration are true and correct. I understand that the information is subject to audit and investigation by the investor-owned utility or representative providing the program services.

Applicant Signature (Property Owner or Agent)	Date
Contractor Signature	Date

- Documentation: Verify form is completed and supporting income information was submitted to service provider/landlord/property manager – Signature is required - uploaded in EEPM.

INCOME VALIDATION



Oncor requires the use of this document when choosing to use Category 1A, 1B or 2

Income Eligibility for Energy Efficiency

Approved!

This meter address qualifies for the LIW Reserve, LIW Multifamily or LIW HVAC program based on the checked Category below:

Meter Address: _____

Meter ID: _____

Service Provider: _____

Type of Residence: _____

<input type="checkbox"/>	Category 1A:
<input type="checkbox"/>	Category 1 B:
<input type="checkbox"/>	Category 2:

[In accordance with TRM 9.0 Vol. 5, Section 3.1.2. Quality Assurance/Quality Control (QA/QC), page 12, the auditor's signature below verifies the required supporting documentation to support the checked Category above has been verified through visual inspection.

Auditor understands for Category 1A, 1B and 2, all completed forms and supporting documentation, if applicable, should be stored for all projects for a minimum of 24 months.

Contact information of the auditor

Name of Auditor: _____

Signature of Auditor: _____

Email address of Auditor: _____

Phone # of Auditor: _____

INCOME VALIDATION



Oncor strongly encourages the use of **Category 1C** to validate/qualify the income for the household. Should Category 1C not apply contact the Oncor Program Manager for other options.

Benefits for Using Category 1C:

- Least intrusive method for the customer
- Easy for provider to look up before approaching the customer
- **Easy documentation with NO customer signature required**
- Easy look up tool with map of qualified area
- Marketing the Program is much easier with known boundaries
- One certificate will apply to the entire multifamily property

LOOK UP TOOL FOR INCOME VALIDATION



Oncor has selected the Easier Energy Efficiency Eligibility for Texas website www.e4-tx.com as it's look-up tool for the Low-Income Weatherization Program's verification source.

How to use the Look Up tool:

Visit www.e4-tx.com

Enter login:

- Username: Oncor
- Password: Oncor


Once logged in follow the below steps:

Enter:

- "Address" and Meter #
- Residence Type
- Utility Co
- SP Name
- SP email

***Please note that these are REQUIRED fields.**

Address Verification



Easier Energy Efficiency Eligibility for Texas

This geo-eligibility tool verifies addresses for LIW reserve program category 1C eligibility. Enter an address, meter number and your information below to verify eligibility and print a certificate of proof

* Address:

* Meter ID:

* Confirm Meter ID:

* Residence Type:

* Utility Company:

* Service Provider:


* Service Provider Email:

Customer Name:

LOOK UP TOOL - INCOME VALIDATION (cont.)



Result




This Meter Address **Qualifies** For The LIW Reserve Program
Category 1C: Eligibility Through Geographic Location:


1. It Is **Outside Of** The HUD Texas QCTs Zone
2. It Is **Within** The HUD Texas LMISD Zone
3. It Is **Outside Of** The Opportunity Zone

Your unique report ID is:
031A980D-75AA-4C60-BDD3-7C9A12BB65EE

Please download the eligibility certificate by clicking "Print" and save the PDF file into your database to be included in the residence eligibility packet.



QCTs LMISD Both



Results will produce a **GREEN** checkmark if the address Qualifies for the LIW Program.

A unique report ID will be created

A **Print** button is ready for accessing the required **Certificate**


Map validates the address and is available for looking at surrounding area

LOOK UP TOOL - INCOME VALIDATION (cont.)



✓ Submit

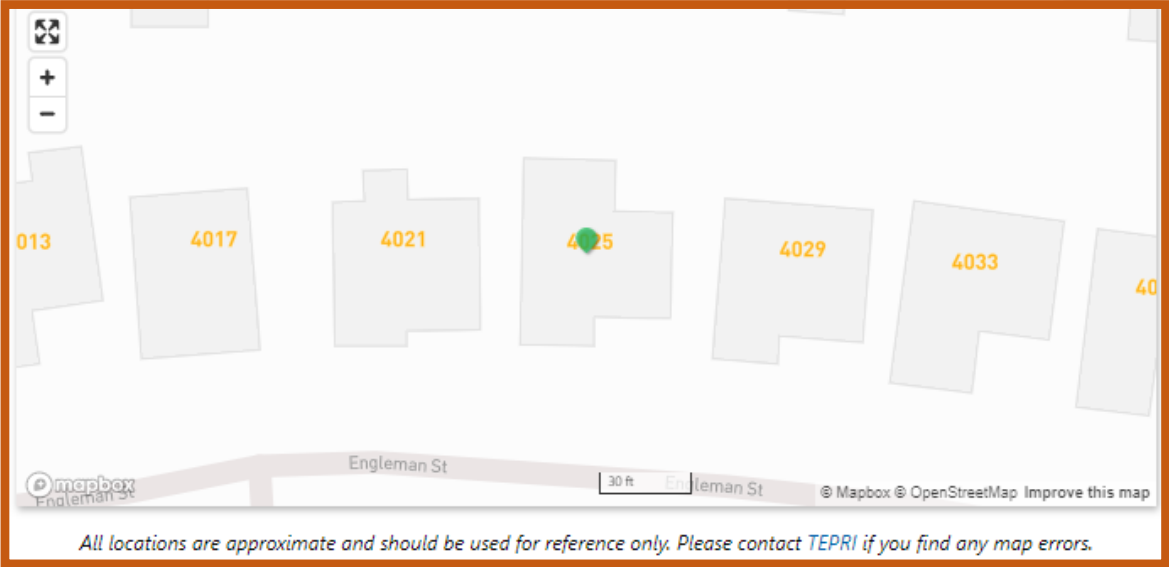
Result



This Meter Address **Does Not Qualify** For The LIW Reserve Program
Category 1C: Eligibility Through Geographic Location:

1. It Is **Outside Of** The HUD Texas QCTs Zone
2. It Is **Outside Of** The HUD Texas LMISD Zone
3. It Is **Outside Of** The Opportunity Zone

QCTs LMISD Both



mapbox Engleman St 30 ft Engleman St © Mapbox © OpenStreetMap Improve this map

All locations are approximate and should be used for reference only. Please contact [TEPRI](#) if you find any map errors.

+ New Report

Results will produce a **“RED” X** if the address Does Not Qualifies for the LIW Program.


There is NO “Print” button to access the required “Certificate”

Map available with the address and is available for looking at surrounding area and verifying the location

LOOK UP TOOL - INCOME VALIDATION (cont.)



Certificate from the “Print” button to be uploaded into EEPM



E4-TX
Easier Energy Efficiency Eligibility for Texas

Approved!

This Meter Address Qualifies for the LIW Reserve Program
Category 1C: Eligibility through Geographic Location
Low- and Moderate-Income Data

Meter Address:	<u>4109 Koala Dr, Killeen, TX, 76543, USA</u>
Meter ID:	<u>103993522LG</u>
Service Provider:	<u>brown</u>
Type of Residence:	<u>Single Family</u>

ID: 031A980D-75AA-4C60-BDD3-7C9A12BB65EE
1/14/2022, 4:12:19 PM



DEMO – VERIFICATION TOOL

FINAL TAKEAWAYS...

- Use **Category 1C** as the first choice to qualify the household - Should Category 1C not apply Oncor strongly suggests contacting the Oncor Program Manager for other options.
- Using Category 1A, 1B and 2 require collection/visual inspection of documentation and signature. (The only reason these Categories should be considered is the property does not qualify using Category 1C).

FINAL TAKEAWAYS...

Summary - What is Required and Uploaded into EEPM?

- Using **Category 1C** you will need:
 - Income Eligibility for Full-Incentive Energy Efficiency Services form that is completed but NOT Signed
 - E4-TX certificate (From the online tool)

- Using **Category 1A, 1B and 2** you will need:
 - Income Eligibility for Full-Incentive Energy Efficiency Services form that is completed and Signed
 - Income Eligibility for Energy Efficiency form that is completed and signed by the auditor

CONTACT INFORMATION



Program Manager - LIW

Joanna Gomez

(214) 486-4153 office

Joanna.Gomez@oncor.com

Program Manager - HEE

Jeff Reed

(214) 486-6966 office

Jeff.Reed@oncor.com

Program Coordinator

Charles McDowell

(214) 486-5016 office

Charles.McDowell@oncor.com

EEPM Help Desk

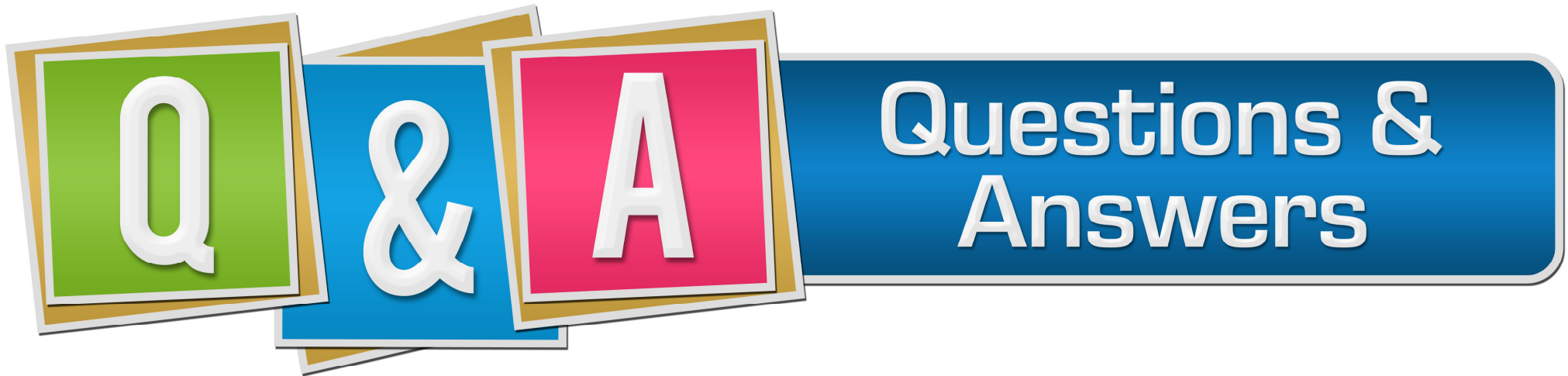
(866) 258-1874

EEPMsupport@oncor.com

Insurance

eepminsurance@oncor.com



A graphic featuring the letters 'Q', '&', and 'A' in white, each on a colored square (green, blue, and pink respectively) with a gold border. These are arranged in a row, overlapping slightly. To the right of this row is a blue rounded rectangle containing the text 'Questions & Answers' in white.

Q & A
Questions & Answers

THANK YOU!

2022 LIW INCOME VERIFICATION PRESENTATION