



# Reporting Residential Measure & Income Qualified Repair Costs

October 2, 2025



# Presenters

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# What We're Covering Today

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## **1 Guidance for Reporting Residential Costs in BEETS**

## **2 Income Qualified Repair Cost Reference Table**



# How Does this Relate to New Reporting Requirements?

Developing these changes and guidance documents started independently of the recent audit, which was recently reviewed in a webinar on 9.25.2025. Implementation details about the new reporting requirements will be shared out as they emerge.



<https://www.bpa.gov/-/media/Aep/energy-efficiency/presentation-webinars/250925-Audit-Findings-Webinar.pdf>

# Both Documents Posted Online

Posted in the [BPA Document Library](#) under “Residential”.

(<https://www.bpa.gov/energy-and-services/efficiency/document-library>)

## Residential Sector

- [Guidance for Reporting Residential Costs in BEETS](#)



## Income Qualified

- [Tribal Low Income Energy Efficiency Grant Application \(FY 2024-2025\)](#)
- [Low-Income Project Information Form + Income Verification \(Optional – Customizable Word Document\)](#)
- [Low-Income Project Information Form + Income Verification \(Optional – Fillable PDF\)](#)
- [Income Verification Form \(Optional\)](#)
- [Repair Cost Reference Table](#)



# #1

## Guidance for Reporting Residential Costs in BEETS

<https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/Reporting-Residential-Costs-in-BEETS.pdf>

## Guidance for Reporting Residential Costs in BEETS

Version: 1.0

The [BPA Energy Efficiency Implementation Manual 2026-2027](#) refers to three types of costs in Section 11: Residential Sector. The purpose of this guidance document is to clarify these terms for Residential measures and how to report them in BEETS:

- **Installed Cost**
- **Income Qualified Measure Cost**
- **Income Qualified Repair Cost**

### Installed Cost

Effective October 1, 2025, all BPA Residential Sector measures, except Income Qualified measures, require a dollar value be entered in the "Installed Cost" field of the Bonneville Energy Efficiency Tracking System (BEETS) (Column R in the UES Measure Upload Template). Additionally, BPA prefers, but does not require, additional detail in the "Wildcard" BEETS field about what types of cost(s) are included in the reported total cost (Column U in the UES Measure Upload Template). The installed cost data will help BPA better understand current market conditions and improve the design of incentive structures.

#### Installed Cost may:

- Include the actual or estimated cost of equipment for measure implementation.
- Include the actual or estimated cost of installation for measure implementation.
- Not include the cost of repairs completed to support the installation for the measure.

*Note for Income Qualified measures: The "Installed Cost" field is not required in BEETS; see next page for more detail on Income Qualified Measure and Repair Costs.*

While the Installed Cost field must be completed in BEETS, BPA recognizes it may be harder to get actual or estimated cost data for some measures. See **Table 1** below for which measures users may enter a value of \$0 if the actual or estimated installed cost is not available.

**TABLE 1: Installed Cost Field Can be Reported as \$0**

BPA IM Section	Measure	Type	BEETS Wildcard Field (Optional for All)
11.7.1	New Northwest Energy Efficient Manufactured Housing (NEEM)	All	Equipment only <b>or</b> Equipment and Installation
11.7.2	Replacement of Pre-1976 Manufactured Home with NEEM Certified Home		
11.7.3	Single-Family New Construction Performance Path	All	Equipment only <b>or</b> Equipment and Installation
11.7.4	BPA Energy Efficient New Multifamily Construction (BPA-Qualified)	All	Equipment only <b>or</b> Equipment and Installation
11.7.5	BPA Zero Energy Ready New Multifamily Construction (BPA-Qualified)		
11.9	All Income Qualified Measures	Installed Cost Field Optional	



For all Income Qualified measures will be applied to this field. Users but it is not required.

the Energy Efficiency Measures, equipment, labor, verification of moisture barriers).

For all Income Qualified measures report, please enter \$0. For guidance see the [BPA IM Document Library](#).

# Purpose

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Clarify cost-related terms for Residential measures and how to report them in the Bonneville Energy Efficiency Tracking System (BEETS).





**Policy changes effective  
October 1, 2025**



# Cost Types

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## Three types of costs in Section 11 of the BPA Implementation Manual:

- Installed Cost
- Income Qualified Measure Cost
- Income Qualified Repair Cost



# Installed Cost

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- **Installed Cost data** will help BPA better understand current market conditions and improve the design of incentive structures.
- **Installed Costs May:**
  - Include the actual or estimated cost of equipment for measure implementation.
  - Include the actual or estimated cost of installation for measure implementation.
  - Not include the cost of repairs completed to support the installation for the measure.

# BEETS & UES Measure Upload Template

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- **Effective October 1, 2025**, all BPA Residential Sector measures, except Income Qualified measures, require a dollar value be entered in the “Installed Cost” field of the Bonneville Energy Efficiency Tracking System (BEETS).
- **UES Measure Upload Template:**
  - Installed Cost (Column R) is REQUIRED
  - “Wildcard” (Column U) is OPTIONAL
    - Text field (200-character limit)

# BEETS & UES Measure Upload Template

**BEETS UES Upload Template** *(FOR BEETS USE ONLY)* Version: 3.3

Email Address of Submitter: <ENTER EMAIL ADDRESS>

Select Utility: <SELECT UTILITY NAME> MEASURE COMPLETION DATE MUST BE AFTER 10/1/2021

CLICK ON HEADERS (BOTH REQUIREMENT & NAMES) for field specific instructions. Enter your information in the white space below starting with row 8.

PROTECTED	REQUIRED	REQUIRED FOR ALL MEASURES					
ROW NUMBER	PROJECT NAME	EEI PERCENTAGE	REFERENCE NUMBER	QUANTITY	COMPLETION DATE	FEDERAL FACILITY	UNIQUE SITE ID
000	May 2022 Upload	100%	RWBHO11090	1	4/2/2022	No	Ex: 554654654654

R	S	T	U
REQUIRED FOR SOME MEASURES	REQUIRED FOR SOME MEASURES	REQUIRED FOR PTCS	OPTIONAL (For utility use)
INSTALLED COST	PRIMARY HEATING SYSTEM TYPE	PTCS REGISTRY MEASURE ID	WILDCARD
\$5,000	Select from drop down	586394	whatever you want

# Installed Cost Exceptions

- **BPA recognizes** it may be harder to get actual or estimated cost data for some measures.
- **If the actual or estimated Installed Cost is not available** users may enter a value of \$0 for the following measures:

BPA IM Section	Measure	Type	BEETS Wildcard Field (Optional)
11.7.1	New Northwest Energy Efficient Manufactured Housing (NEEM)	All	Equipment only or Equipment and Installation
11.7.2	Replacement of Pre-1976 Manufactured Home with NEEM Certified Home	All	Equipment only or Equipment and Installation
11.7.3	Single-Family New Construction Performance Path	All	Equipment only or Equipment and Installation
11.7.4	BPA Energy Efficient New Multifamily Construction (BPA-Qualified)	All	Equipment only or Equipment and Installation
11.7.5	BPA Zero Energy Ready New Multifamily Construction (BPA-Qualified)	All	Equipment only or Equipment and Installation
11.9	All Income Qualified Measures	<i>Installed Cost Field Optional</i>	



# *Reporting Income Qualified Projects?*



# Reporting Income Qualified Measure Cost

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**Effective October 1, 2025**, the “Income Qualified Measure Cost” field is required in BEETS for all Income Qualified measures (Column N in the UES Measure Upload Template).

- Relevant IQ cost caps applied to this field.
- Costs in this field will factor into the repair cost cap calculation.
- “Installed Cost” field not required for Income Qualified measures.

# Reporting Income Qualified Repair Cost

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**Effective October 1, 2025**, the “Income Qualified Repair Cost” field is required in BEETS for all Income Qualified measures.

- No repair costs to claim for reimbursement or to report? **Enter \$0.**
- Repair costs must be listed separately on the contractor invoice and reported separately in BEETS.
- For measures that allow repairs, reported repair costs will be reimbursed within the repair cost policy.
- ***New repair cost policy:*** Related income qualified repair costs will be capped at 300% of the reported income qualified measure cost for projects with a measure cost of \$1,000 or higher.

# Reporting Income Qualified (IQ) Costs

## Required: Income Qualified Measure Cost

- Field required to be populated.
- Different field than Installed Cost field (**column N** on upload template).
- IQ payment cost cap applied.
- Don't want the full payment cost cap? Don't report the full amount.
- Some measures reimbursed 100%, including insulation.
- Repair cost cap policy is based on this field (*if applicable*).

## Required: Income Qualified Repair Cost

- Field required to be populated.
- If not claiming repair costs for reimbursement, **enter \$0**.
- If the Income Qualified measure cost is \$1,000 or more, repairs will be reimbursed at 300% of the income qualified measure cost.

## Optional: Installed Cost for Income Qualified

- Not required (**optional**) for IQ measures.
- Different field than IQ measure cost field (**column R** on upload template).
- IQ payment cost cap **does not** apply here.
- Informational only.
- Can include additional types of costs as needed.

# UES Measure Upload Template for IQ Measures

Column N	Column O	Column P	Column Q	Column R
REQUIRED FOR INCOME QUALIFIED MEASURES		REQUIRED FOR SOME MEASURES		REQUIRED FOR SOME MEASURES
INCOME QUALIFIED MEASURE COSTS	INCOME QUALIFIED REPAIR COSTS	MANUFACTURER	MODEL	INSTALLED COST
<b>Required</b> for all IQ measures; applicable IQ payment cost caps will be applied; some measures reimbursed 100%	<b>Required</b> field must be populated; repair cost cap applied here; enter \$0 if not seeking EEI reimbursement for repairs			Optional for IQ measures





# Installed & Measure Cost FAQs

# FAQs



- ***Does sales tax needed to be included?***
  - No. If on invoice, include it. If not, no need to add it.
- ***Do rebates, military/senior discounts, etc.... need to be added to the total?***
  - No. Report total amount on invoice. No need to add additional discounts.
- ***Do discounts and sales need to be included in the equipment/installed costs for EV chargers and smart thermostats?***
  - No. Include total amount on invoice. No need to add additional discounts.
- ***For EV chargers or smart thermostats, installation information is often not included. Should the reported installed cost just be what the customer paid?***
  - Yes

## FAQs



- *For “Retail” RefNos, can utilities just enter \$0? It’s basically the retail cost at a retailer and the purchase price is often unknown and will need an estimate.*
  - Yes. If no invoice is available, please estimate installed cost or enter \$0.
- *If a contractor includes multiple projects (e.g., attic insulation, crawlspace insulation, attic air sealing, and crawlspace air sealing) as one total on the invoice as \$8,000, how should this be divided?*
  - Educated guess/estimate is fine. Additional information in the Wildcard field in the BEETS Upload template would be appreciated.

# FAQs



- ***What is included in the Income Qualified (IQ) measure cost?***
  - Per the IM, IQ measure cost “includes any cost incurred for meeting requirements and specifications (e.g., equipment, labor, verification of income, attic and crawl space ventilation, removal of knob and tube wiring, and underfloor moisture barriers).”
- ***What is considered an Income Qualified repair cost?***
  - See the [Income Qualified Repair Cost Reference Table in the BPA IM Document Library](#) for guidance on allowable repairs.

## FAQs: Installed Costs

*Guidance document will be updated as needed with FAQs as they are submitted and answered.*

B O N N E V I L L E P O W E R A D M I N I S T R A T I O N

Guidance for Reporting Residential Costs in BEETS

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### Income Qualified Measure Cost

Effective October 1, 2025, the "Income Qualified Measure Cost field" is required in BEETS for all Income Qualified measures (Column N in the UES Measure Upload Template). The Income Qualified payment cost cap will be applied to this field. Users can enter additional cost data in the "Installed Cost" field for Income Qualified measures, but it is not required.

Per BPA's [Energy Efficiency Implementation Manual 2026-2027](#) in section 11.9 Low-Income Energy Efficiency Measures, measure cost "includes any cost incurred for meeting requirements and specifications (e.g., equipment, labor, verification of income, attic and crawl space ventilation, removal of knob and tube wiring, and underfloor moisture barriers)."

### Income Qualified Repair Cost

Effective October 1, 2025, the "Income Qualified Repair Cost" field is required in BEETS for all Income Qualified measures (Column O in the UES Measure Upload Template). If there are no repair costs to claim or report, please enter \$0. For guidance on allowable repairs, please see the **Income Qualified Repair Cost Reference Table** in the [BPA IM Document Library](#).

*FAQs to be updated here as needed!*



**Questions or  
Comments on  
Reporting Costs?**

<https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/Repair-Cost-Reference-Table.pdf>

# Purpose

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To provide a more clarity about what income qualified-related repairs can be eligible for reimbursement as a repair, what should be included as an installation cost, or what is not eligible for reimbursement.



# Income Qualified Repair Costs

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- All related repair costs must be directly associated with the installation of the measure, either for health and safety reasons or to ensure the measure's effectiveness.
- When asked by a utility or implementer, BPA may determine what repairs are eligible.
- At utility's discretion if they want to spend EEI to cover eligible repair and measure costs.

# What's Included in this Reference Table?

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- Table is not comprehensive.
- If a specific repair is not referenced on this table, it could still qualify as a repair. Utilities are encouraged to reach out to their EER if there is any question about eligibility.
- Table will be updated as needed.
- Note that not all Income Qualified measures are eligible for reimbursement of repair costs. See IM section 11.9 for details.

# What's Included in this Reference Table?

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- Past repairs that have previously been asked about and reviewed.
- New policy guidance on full roof replacements and extended warranties.
- Nuance about some of the repair types.
- Repair examples that are already included in the IM to create a central reference.

# How to Navigate

## Cost Examples & Guidance

Below are some repair and measure costs that are already listed in section 11.9 in BPA's [Energy Efficiency Implementation Manual 2026 - 2027](#).

Task	Repair Cost Directly Related to Installed Measure	Measure Cost Directly Related to Installed Measure
Removing a dead animal for income qualified insulation.	Allowed (e.g., animal is within the wall or crawlspace being worked on)	Allowed
Plumbing-related repairs.	Allowed, so long as it relates to or is impacted by the installed measure.	Allowed, so long as it relates to or is impacted by the installed measure.
Rewiring in income qualified home receiving wall insulation that has knob and tube wiring.	Allowed	Allowed
Bringing unsafe electrical wiring up to code.	Allowed, as long as the work and upgrade are only done on the circuit affected by the income qualified efficiency measure.	Allowed

# Highlighted Nuance

*When questions come up about related repair costs, try and reference this document first.*

Task	Repair Cost Directly Related to Installed Measure	Measure Cost Directly Related to Installed Measure
Replacing EPDM rubber cover on roof replacement after insulating a roof.	Allowed	Allowed
Full roof replacements or tear-offs.	Not allowed as a repair cost	Not allowed as a measure cost

**Example:** *Roof replacements are asked about consistently. BPA clarified that costs associated with roof replacements or tear-offs are not reimbursable. However, provides further guidance that replacing just the EPDM rubber membranes after insulating the roof are an eligible cost.*



# Can't Find Reference to Specific Cost or Task?

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*If unsure whether a related cost, task, or project is eligible as a repair cost, reach out your EER and provide relevant details about the installation. This reference list will be updated as needed.*

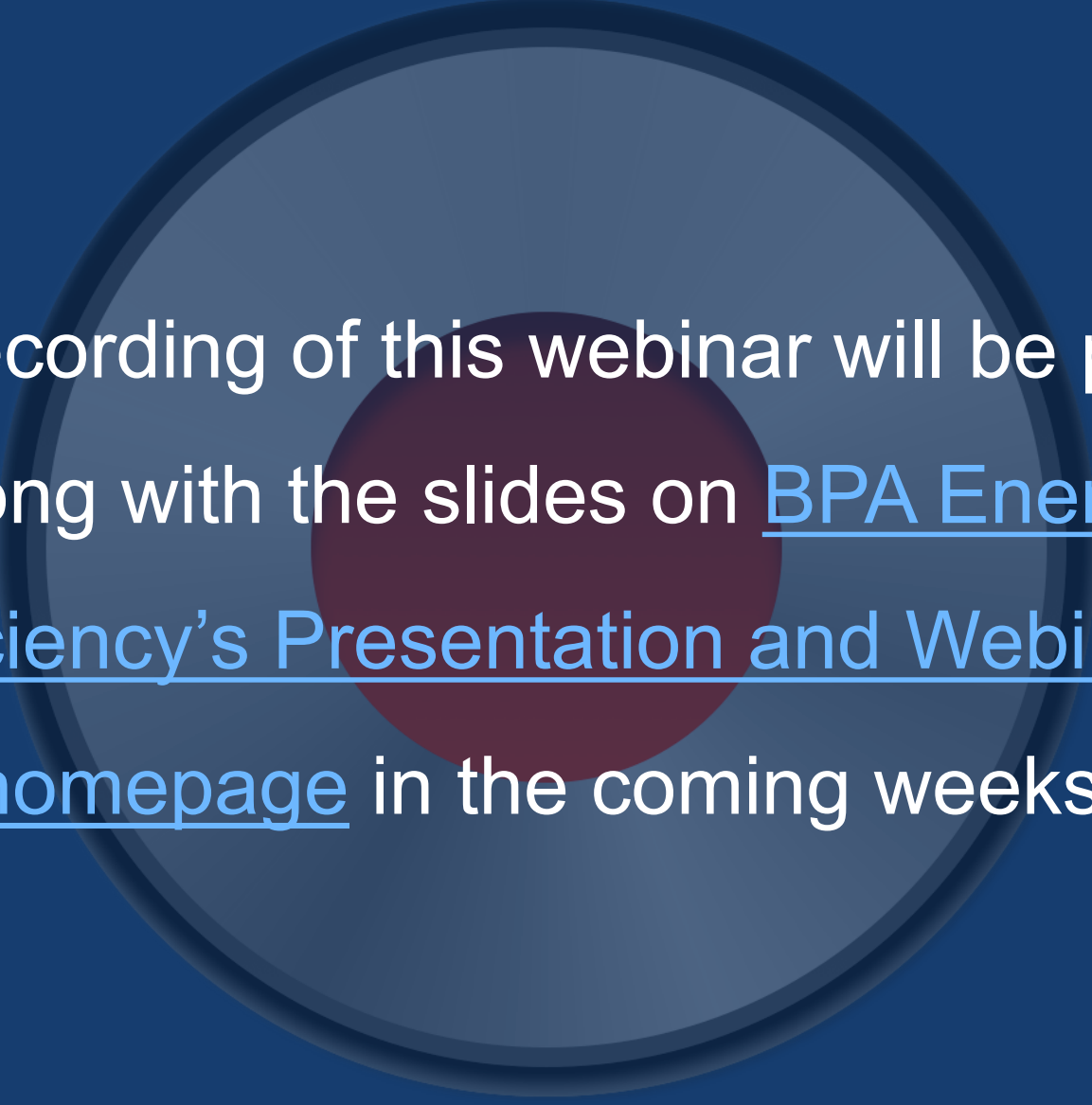
**Questions or  
Comments on Eligible  
Repair Costs?**

# Open to Feedback!

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- These are brand new resources.
- Goal is to improve transparency, not muddy the waters.
- If these are unclear, not helpful, or needs more information, please let your EER know and we will work to improve them!





The recording of this webinar will be posted  
along with the slides on [BPA Energy  
Efficiency's Presentation and Webinars  
homepage](#) in the coming weeks.

# Thank you so much for your time!

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Additional questions? Please contact your utility Energy Efficiency Representative.

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