



2025 RESIDENTIAL & HARD-TO-REACH STANDARD OFFER PROGRAMS KICKOFF

WEDNESDAY OCTOBER 30, 2024

SAFETY CONTACT HALLOWEEN

- Be alert for trick-or-treaters and other pedestrians
- Slow down and scan the road. Remember: Slower speeds save lives
- Watch for young trick-or-treaters in unexpected places. Children may be unaware of traffic and dart into the street unexpectedly
- Follow the rules of the road and obey signs and signals
- If possible, cross streets at crosswalks or intersections. Look for cars in all directions, including those turning left or right
- Put electronic devices down, keep heads up and walk, don't run across the street



CUSTOMER EXPERIENCE VALUES



**Greet Customers
Positively**



**Respond To
Customers
Promptly**



**Easy To Do
Business With**



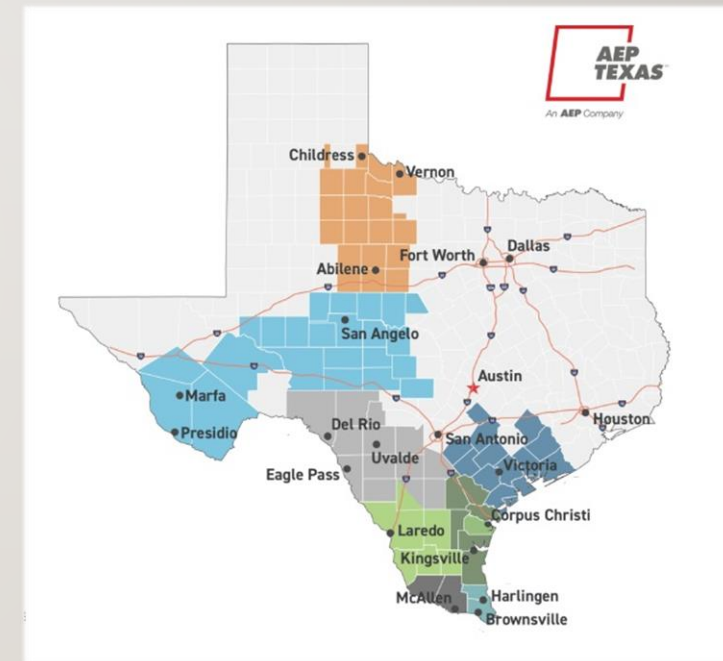
**Assume Positive
Intent**



**Treat Customers
With Respect &
Dignity**

SERVICE TERRITORY

- AEP Texas is offering the Residential and Hard-to-Reach Standard Offer Programs
- AEP Texas Primary Cities and Surrounding Areas:
 - AEP Texas – Central Division
 - Laredo District (Green)
 - Corpus Christi (Dark Blue)
 - Rio Grande Valley (Dark Grey)
 - AEP Texas – North Division
 - Abilene District (Beige)
 - San Angelo District (Blue)



PROGRAM OBJECTIVE

- Must be cost-effective
- Reduce summer & winter peak demand and annual energy consumption
- The incentives are based on peak demand (kW) and annual energy (kWh) savings
- The programs utilize approved deemed savings values found in the Technical Reference Manual (TRM) to estimate kW and kWh savings impacts

2025 CHANGES

- A monthly incentive cap of \$20,000 will apply for all programs.
 - Unused funds from a prior month will NOT roll over into a subsequent month.
 - Reset on first business day of each month
 - Annual limit is not a guarantee of funds
- LED lighting cap will be 10 bulbs per project
- **Work schedules are required for all projects**
- New program website/contractor portal www.aeptxsaves.com effective January 1, 2025
- The most recent version of TRM 12.0 will be used for the 2025 program year
- Email addresses for customers **are required**. If email address is not available, enter noemail@noemail.com

2025 CHANGES

- No Multi-Family restrictions or caps for 2025
- Customers will need to keep education material flyer for 60 days from the submitted project.
- Emphasize to customer they are subject to random inspection
- Customer contact phone number is required or project will fail
- **Duct Sealing will not be eligible until further notice**
- **Air purifiers and Advanced Power strips NOT eligible for 2025 program year**

2025 REMINDERS

- The application review timeline is 60 business days
- An area-weighted average R-value will be calculated for all homes consisting of two or more levels of Ceiling Insulation. Project Sponsors must use calculator located in P3 database
- All documentation will be uploaded into P3 database
- Program Manager has the authority to cancel/delete any project not submitted within 45 days of installation
- All photos must be geotagged. Refer to measure documentation guide for more details
- Eligibility documentation must be uploaded for HTR SOP projects

2025 REMINDERS

- Air infiltration measure restricted to HTR
- Insurance documents are required and emailed to the program manager prior to beginning work
- AEP Texas requires at least one primary measure with 2 secondary measures per project
- Underserved area bonus – 10% adder for eligible areas

UNDERSERVED AREA BONUS

- For program year 2025 a 10% adder for projects in eligible counties will be applied
- Multi-Family projects are NOT eligible for bonus
- Excluded counties: Nueces, Starr, Hidalgo, Cameron, Taylor, Tom Green

PRIMARY & SECONDARY MEASURES

Primary Measures include:

- Insulation
- HVAC Replacement
- Attic Encapsulation
- Air infiltration (HTR only)
- Heat Pump Water Heaters
- Energy Star Windows

Secondary Measures:

- LED Lighting
- Faucet Aerators
- Low-Flow Showerheads
- Water Heater Pipe Wrap
- Smart Thermostat



AEP TEXAS RESIDENTIAL PROGRAM

- Project Sponsors with no work history with AEP Texas will start with a cap up to \$20,000
- Milestone schedule
 - (40% of contract met by May 31, 2025; 75% of contract met by August 31, 2025)
- Single-Family and Multi-Family projects are eligible
- Annual limit allocated at Program Manager discretion
- Additional funds may be allocated at Program Manager's discretion



AEP TEXAS HTR PROGRAM

- Milestone schedule (40% of contract met by May 31, 2025; 75% of contract met by August 31, 2025)
- Annual limit allocated per Program Manager discretion
- Single and Multi-Family projects are eligible
- Additional funds may be allocated per the Program Manager's discretion

COMMENTS AND QUESTIONS.....



ISSUES & CONCERNS

- Air Infiltration measure – extremely important not to violate minimum ventilation rule for health & safety reasons
- All documents must be uploaded as required before a project may be completed and submitted in P3 database.
 - All projects must be submitted within 45 days of installation
- The appropriate year and specific program Field Note Forms must be used
- Must have accurate reporting of heating type, home square footage, existing levels of insulation, # of treated areas such as inside vent locations (returns, vents, plumbing penetrations, light bulbs, etc.)
- HERs Rater or BPI certified employee needs to be on staff to confirm measure installation quality and functionality to provide energy efficiency without harm to the residential premise (air infiltration measure)
- Failure to perform pre & post testing for air infiltration measure will result in project failure

ISSUES & CONCERNS (CONT.)

- All will projects will be considered failures if:
 - Failure to provide correct customer contact information
 - Failure to accurately report “existing” R-Value for ceiling insulation
 - Failure to provide customers with a positive customer experience, for example:
 - Failure to respond to customers (phone calls, emails, inquiries, etc.)
 - Failure to keep appointments
 - Failure to clean up after completing installations
 - Satisfactory resolution of any customer complaint

ISSUES & CONCERNS (CONT.)

- All will projects will be considered failures if:
 - Failure to keep LED lighting installed
 - Failure to get in contact with customer for inspection will fail

ISSUES & CONCERNS (CONT.)

- Misrepresentation of the program, measures to be installed and service areas on applications
 - **If have cities listed on target area that you are not going to work then it will disqualify you from the program**
- Using unapproved marketing materials will fail and be subject to disqualification from the program
- Poor measure installations will fail
- Uploaded paperwork missing original customer signature with date will fail
- Blurry and/or duplicated photos submitted with projects will fail and disqualify from program
- Inaccurate photos of electric resistance documentation provided will fail

PHOTO EXAMPLES OF GOOD VS. POOR INSTALLATIONS



CEILING INSULATION

- Clear close-up of existing insulation level vs. blurry photo

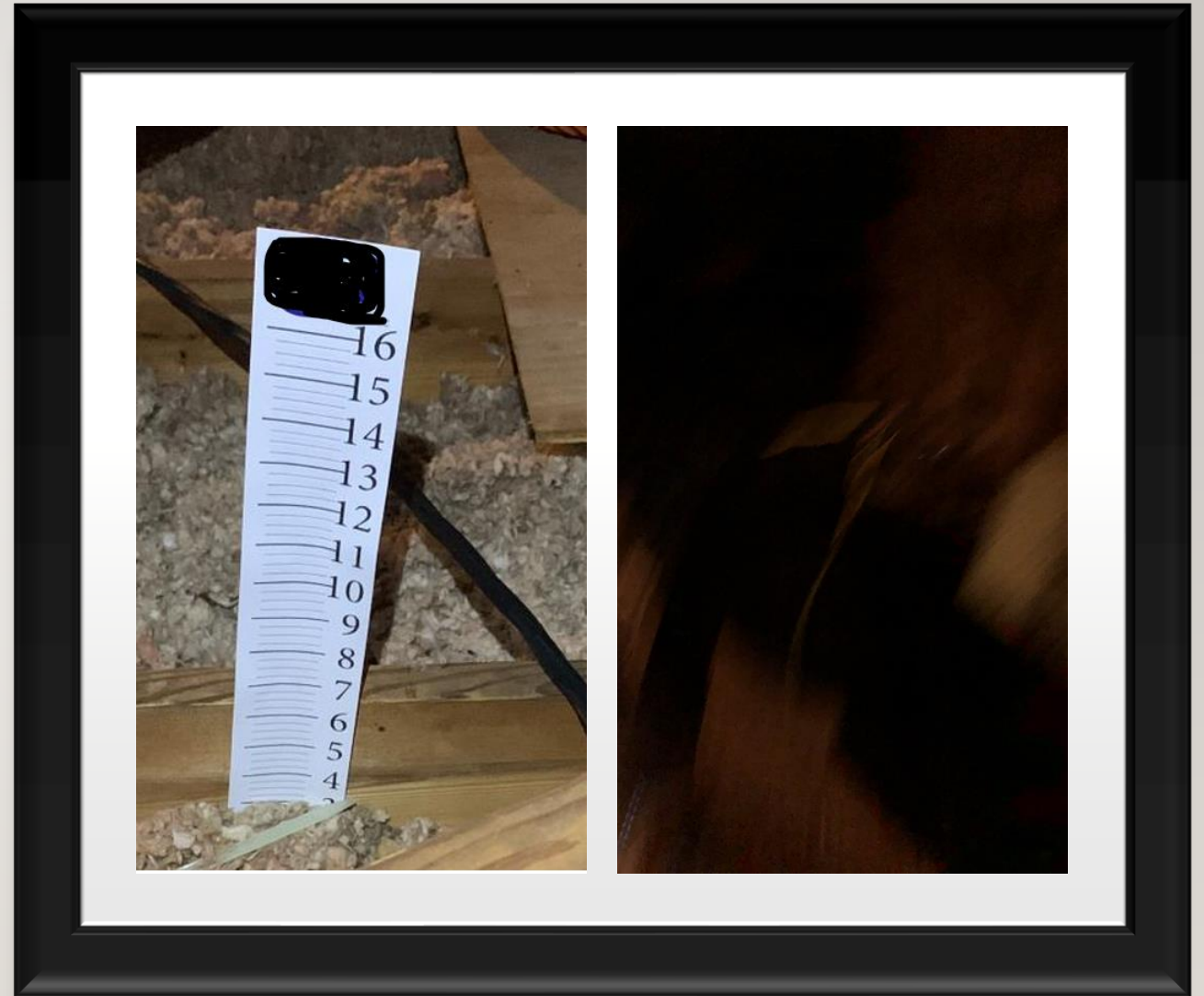


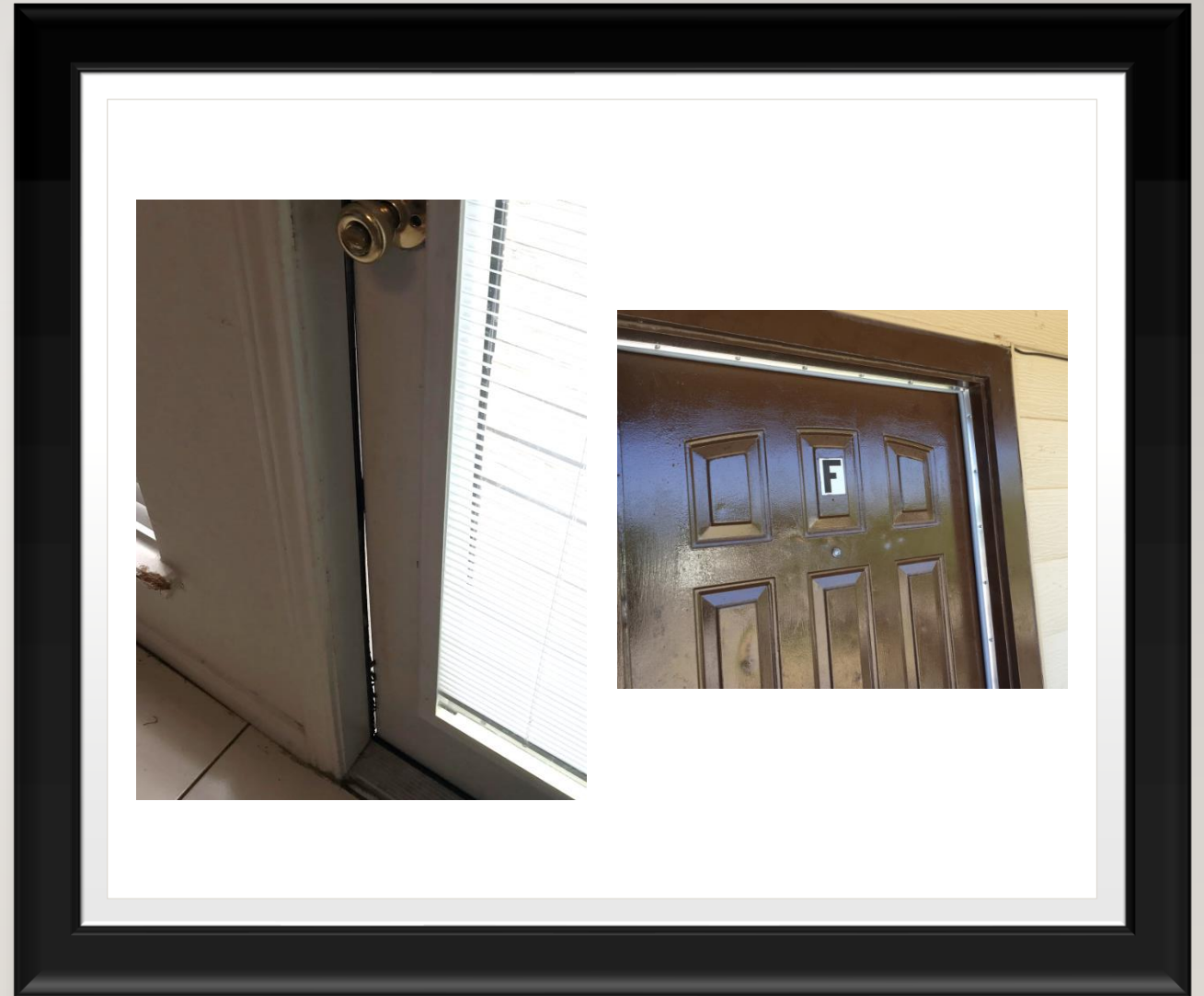
PHOTO DOCUMENTATION

- Incorrect Documentation of Electric Resistance Furnace



AIR INFILTRATION

- Proper installation method vs. poor installation method



AIR INFILTRATION

- Proper installation method vs. failure to complete prescription requirements



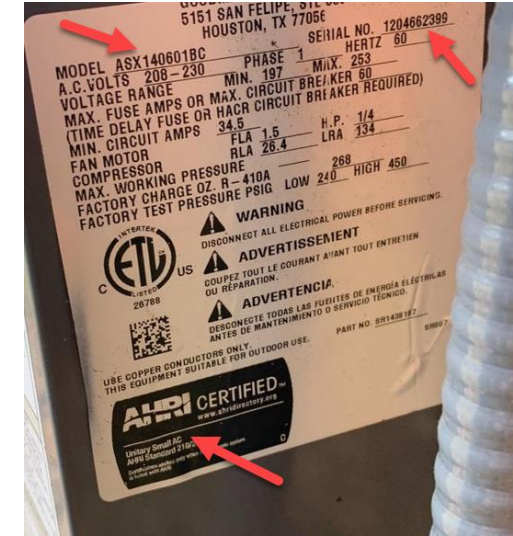
LIGHTING

Do not leave bulbs uninstalled with Customer. Bulbs must be installed And accurately reported



ELECTRIC RESISTANCE DOCUMENTATION

- Correct Documentation of Electric Resistance Furnace



GEO TAGGED PHOTO DOCUMENTATION

Geolocation apps- Here are a few options that can be used to capture the date and location



General Rules for photographic documentation

1. Clear enough to zoom in and read fine print for photos that include text
2. Capture the entire object
3. Use lowest resolution/file size that still meets above requirements
4. Files must be less than 700 MB in size to be uploaded in P3
5. Review the project twice and submit once
6. Follow the Program Manual and TRM guidelines on what to capture

MEASURE DOCUMENTATION GUIDE CONT.

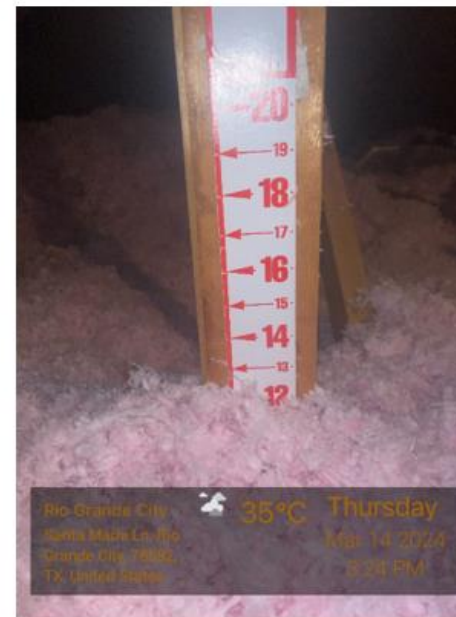
Ceiling Insulation

- Post insulation [Pictures](#)

Post-install Panoramic # 1



Post-install Insulation Ruler



ATTIC ENCAPSULATION



COMMENTS AND QUESTIONS.....

CONTRACTOR ELIGIBILITY

- Any entity meeting the programs application requirements is eligible to apply for participation in the programs
- Eligible Project Sponsors may include:
 - Energy Service Companies (ESCOs)
 - Retail Electric Providers (REPs)
 - National or local companies that provide energy-related products (e.g., insulation or HVAC)

CUSTOMER ELIGIBILITY

- Must be an AEP Texas residential customer
- Eligible customers shall be identified by the Electric Service Identifier (ESI ID) numbers on their electric bill:
 - AEP Texas – Central Division customer ESI ID's begin with 100327894
 - AEP Texas – North Division customer ESI ID's begin with 102040497....

LOW-INCOME ELIGIBILITY

- Hard-to-Reach (HTR) customers are defined as residential customers who have household income at or below 200% of federal poverty guidelines or who have been designated as HTR through a PUCT approved methodology
- Single-Family & Multi-Family Category 1
 - IA - Eligible through other programs or services
 - IB - Eligible through community action or social service agency
 - IC - Eligible through geographic location
- Single-Family & Multi-Family Category 2
 - Eligible through income verification

LOW-INCOME ELIGIBILITY MULTI-FAMILY FORM

- Multi-Family Form

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		Suite Number	
City		State TX	Zip Code
Property Owner or Agent's Phone Number with Area Code () -	Fax Number with Area 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 () -	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):

Affordable Housing Disposition Program Project-Based Section 8
 HOME Rental Housing Development Rural Rental Section 515 (FMHA)
 Low-Income Housing Tax Credit Program Section 811 Project Rental Assistance Program
 Multifamily Bond Program Texas Housing Trust Fund
 Public Housing Authority Other income-qualifying housing program
(Texas Housing Association) Program name: _____

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 multifamily complex or 75 percent or more of tenants participate in one of the programs in Category 1A or other low-income program service (such as LIHEAP/CEAP and Weatherization Assistance), 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): Form is not required for geographical qualification as long as the relevant information is in the utility's tracking data (service address, geographic qualifier).

Housing and Urban Development (HUD) Low-Income Housing-Qualified Census Tract or Block—GEO ID: _____

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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 an 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 included 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

Size of family unit	Annual Income	Monthly Income	Weekly Income
1	\$30,120	\$2,510	\$579
2	\$40,880	\$3,407	\$786
3	\$51,640	\$4,303	\$993
4	\$62,400	\$5,200	\$1,200
5	\$73,160	\$6,097	\$1,407
6	\$83,920	\$6,993	\$1,614
7	\$94,680	\$7,890	\$1,821
8	\$105,440	\$8,787	\$2,028
Each additional person, add:	\$10,760	\$897	\$207

* Notice: Income ceilings are for February 1, 2024—January 31, 2025.
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

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" is 75 percent or higher, please certify the eligibility of the apartment complex with your signature below.

(Electronic) By typing my name below, I certify the above statements to be true and correct to the best of my knowledge and that this information can be used for the purpose of processing my Multifamily Apartment Complex Income Eligibility for Full-Incentive Energy Efficiency Services Form.
(Non-Electronic) If filling out the delineation by hand, please provide your original signature and date.

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.

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LOW-INCOME ELIGIBILITY SINGLE-FAMILY FORM

- Single-Family Form

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

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 (such as Weatherization Assistance), 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: Form is not required for geographical qualification as long as the relevant information is in the utility's tracking data (service address, geographic qualifier)

Housing and Urban Development (HUD) Low-Income Housing-Qualified Census Tract or Block—GEO ID: _____

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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)

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 <small>(add the amount entered on each line to figure your total household income)</small>	

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.

Size of family unit	Annual Income	Monthly Income	Weekly Income
1	\$30,120	\$2,510	\$579
2	\$40,880	\$3,407	\$786
3	\$51,640	\$4,303	\$993
4	\$62,400	\$5,200	\$1,200
5	\$73,160	\$6,097	\$1,407
6	\$83,920	\$6,993	\$1,614
7	\$94,680	\$7,890	\$1,821
8	\$105,440	\$8,787	\$2,028
Each additional person, add:	\$10,760	\$897	\$207

* Notice: Income ceilings are for February 1, 2024—January 31, 2025. Annual updates are posted on <http://www.puc.texas.gov/industry/electric/forms/>

(Electronic) By typing my name below, I certify the above statements to be true and correct to the best of my knowledge, and that this information can be used for the purpose of processing my Single-Family Income Eligibility for Full-Incentive Energy Efficiency Services Form.

(Non-Electronic) If filling out the delineation by hand, please provide your original signature and date.

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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LOW-INCOME ELIGIBILITY (CONT.)

➤ Eligible through geographic location

- Low Mod Income Summary Data (LMISD) - [LMISD Web Tool](#)
- Housing and Urban Development Qualified Census Tracts (HUD QCT) [HUD QCT Tool](#)

LOW-INCOME ELIGIBILITY (CONT.)

➤ Premise is an LMISD

- Click on the link to LMISD
- Enter the premise address, hit Enter (the target address will be centered on the map)
- In the Layers control, uncheck all but “LMISD by Block Group”, and leave the control box open
- Click on the property at the center of the map to see pop-up with data
- Scroll down the pop-up just enough to find the Lowmod_pct field; be sure the geoname is still visible at the top
- If Lowmod_pct is greater than or equal to 51.00, then the property qualifies as low-income
- Include a screenshot of the result along with the income form

1901 Grafton St, Marshall, TX, 75401

Show search results for 1901 Grafton ...

Step 2. Pick Just One LMISD Layer

Layers

- LMISD by Block Group
- LMISD by Place & Consolidated City
- LMISD by County Subdivision
- LMISD by County

Source: 2015ACS

geoname: Block Group 4, Census Tract 204.02, Harrison County, Texas

Stusab: TX

Countyname: Harrison County

State: 48

County: 203

Tract: 020402

Blckgrp: 4

Low: 175

Lowmod: 300

Lmml: 370

Lowmoduniv: 415

Lowmod_pct: 72.29

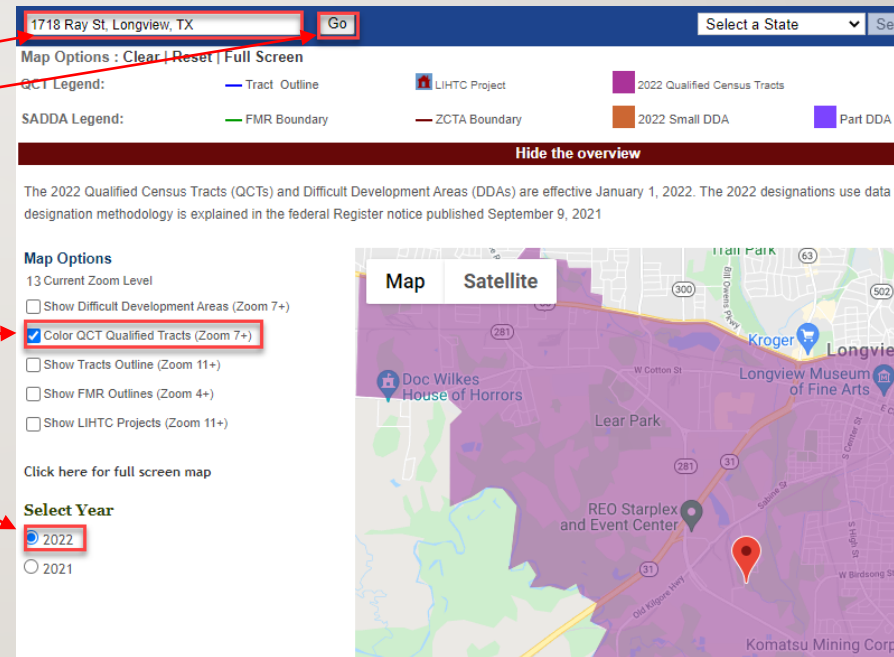
Zoom to

LOW-INCOME ELIGIBILITY (CONT.)

➤ Premise is an HUD QCT

- Click on the link to [HUD QCT](#)

1. Enter the premise address
2. Hit Go
3. Check “Color QCT Qualified Tracts”
4. Select current (or most recent) year
5. Include a screenshot of the result along with the income form



LOW-INCOME ELIGIBILITY (CONT.)

200 Percent of Health and Human Services (HHS) Poverty Guidelines			
Size of family unit	Annual income	Monthly income	Weekly income
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Annual updates are posted on <http://www.puc.texas.gov/industry/electric/forms/>

*Income ceilings are for February 1, 2024 – January 31, 2025 or until 2025 values are published

- Income guidelines are updated every January and posted on the PUCT website <http://www.puc.texas.gov/industry/electric/forms/>

MEDICARE REWARD LETTER EXAMPLE

Your New Benefit Amount

BENEFICIARY'S NAME [REDACTED]

Your Social Security benefit will increase by 5.9% in 2022 because of a rise in the cost of living. You can use this letter as proof of your benefit amount if you need to apply for food, rent, or energy assistance. You can also use it to apply for bank loans or for other business. Keep this letter with your important financial records.

How Much You Will Get	
Your monthly benefit before deductions	\$1,048.10
Deductions:	
Medicare Medical Insurance (If you did not have Medicare as of November 18, 2021 or if someone else pays your premium, we show \$0.00)	-\$170.10
Medicare Prescription Drug Plan (We will notify you if the amount changes in 2022. If you did not elect withholding as of November 1, 2021, we show \$0.00)	-\$12.90
U.S. Federal tax withholding	-\$0.00
Voluntary Federal tax withholding (If you did not elect voluntary tax withholding as of November 18, 2021, we show \$0.00)	-\$0.00
After we take any other deductions, you will receive the payment you are due for December 2021 on or about January 3, 2022.	\$865.10

The information above shows your monthly benefit amount before and after deductions. Please remember, we will pay you in the month following the month for which it is due.

The Treasury Department requires Federal benefit payments to be made electronically. If you still receive a paper check, please visit the Department of the Treasury's Go Direct website at www.godirect.gov to request electronic payments.

If you disagree with any of these amounts, you must file an appeal with us within 60 days from the date you receive this letter. We will assume you got this letter 5 days after the date of the letter, unless you show us that you did not get it within the 5-day period. The fastest and easiest way to file an appeal is to visit <https://secure.ssa.gov/iApp/INMD/start> online.

If You Have Questions

- Visit us at www.ssa.gov online.
- Call us toll-free at 1-800-772-1213 (TTY 1-800-325-0778).
- Contact your nearest Social Security office.

[REDACTED]

Other Help For Older Adults and People with Disabilities
The Administration for Community Living offers older adults and people with disabilities a way to connect to a variety of community services and resources.

For Older Adults: Eldercare Locator at 1-800-677-1116 or www.eldercare.acl.gov
For People with Disabilities: Disability Information and Access Line (DIAL) at [REDACTED]

ELIGIBLE PROPERTIES


- Eligible residential properties include:
 - Single-Family properties
 - Multi-Family properties
 - Residential dwellings or additions completed before January 1, 2023 are eligible



REQUIRED FORMS

- Host Customer Agreement and Acknowledgement (HCA) Form
 - Customer authorizes work and verifies work completion
 - Customer acknowledges installations are subject to inspection
 - Must be signed by the customer or it fails
- Field Notes Form to be used by crews/installers in the field to capture all relevant measure installation data that is used to calculate savings
- Revised Income Eligibility Verification Forms for Single-Family and Multi-Family properties (Hard-to-Reach only)
- Customer Education Materials (Saving Energy at Home document) – Customer should acknowledge someone reviewed this with them
- Energy Efficiency Flyer

HOST CUSTOMER AGREEMENT



AEP TEXAS
An AEP Company

2025 CUSTOMER AGREEMENT & ACKNOWLEDGEMENT

_____, TX, _____ and _____
(Customer Name) (Street Address) (City) (Zip Code) (Best Daytime Phone Number)

_____, _____ and _____
(Energy Efficiency Service Provider) (Street Address) (City) (State) (Zip Code) (Phone number)

_____, _____ and _____
(Subcontractor) (Street Address) (City) (State) (Zip Code) (Phone number)

Energy Efficiency Service Provider ("EESP") is participating in one of the following Standard Offer Programs ("SOP") developed by AEP Texas Inc. ("AEP Texas").
 Check One: Hard-to-Reach SOP Residential SOP AEP Texas ESI ID Number: _____

EESP and Customer agree as follows:

- EESP agrees to install and Customer agrees to the installation of energy efficiency improvements that will produce energy savings and/or peak demand savings that are qualified for the SOP.
- EESP warrants that it will install all energy efficiency improvements in a good and workman-like manner consistent with the prevailing standards for energy efficiency improvement installation as practiced by qualified contractors in the area and inform Customer of any adverse environmental or health effects associated with the improvements installed.
- Customer shall have the right to cancel this Agreement at any time and for any reason prior to midnight of the third business day following the date of this Agreement. Customer may exercise this right of cancellation by providing EESP any written statement that is signed and dated by Customer and states Customer's intention to cancel this Agreement.
- Customer acknowledges that EESP is receiving an incentive for the energy and peak demand savings derived from Customer's energy efficiency improvements and that such incentive is paid for through a ratepayer funded program, manufacturers or other entities.
- Customer has received a written and oral disclosure of the financial arrangement between EESP and Customer. This includes an explanation of the total Customer payments, the total expected interest charged, all possible penalties for non-payment, and whether Customer's installment sales agreement may be sold.
- Customer acknowledges that any review, inspection, or acceptance by AEP Texas of Customer's premises or of the design, construction, installation, operation or maintenance of the energy efficiency equipment is solely for the information of AEP Texas. In performing any such inspection or review or in accepting the installed equipment, AEP Texas makes no representation or warranty whatsoever as to the economic or technical feasibility, capability, safety or reliability of the equipment, its installation by EESP or its compatibility with Customer's facilities. In addition, Customer acknowledges that AEP Texas makes no warranty or representation regarding the qualifications of EESP, and that the Customer is solely responsible for the selection of EESP.
- The EESP must measure and/or report to the utility the respective energy and peak demand savings from the installed energy efficiency improvements.
- EESP will maintain, or will ensure subcontractor maintains, liability insurance to cover property damage.
- Customer acknowledges that EESP is an independent contractor and is not part of, nor endorsed by the PUCT or by AEP Texas, and that EESP is not authorized to make representations or incur obligations on behalf of AEP Texas. Customer further acknowledges that AEP Texas is not a party to Customer Agreement and that EESP and Customer are solely responsible for performance hereunder.
- In the event of non-performance by EESP or the subcontractor, Customer may make a complaint to the Office of Consumer Protection of the Public Utility Commission of Texas (PUCT) at 1-888-735-9477 or by email at customer@puc.texas.gov (TTY 1-800-735-3938), or the Office of the Attorney General's Consumer Protection Hotline at 1-800-421-0508.
- Customer has received a written disclosure of all warranties, work activities and terms and conditions.
- No EESP, manufacturer, or other business involved in providing your energy efficiency improvements may ask or require you, the Customer, to give up your rights under consumer protection statutes, waive performance warranties, or make false claims of energy savings and reductions in energy costs.
- Customer agrees to provide AEP Texas with access to Customer's utility bills, project documentation, contractor invoices, and technical and cost information directly related to the project. In addition, customer acknowledges that consumption data may be disclosed to the statewide Evaluation, Measurement and Verification ("EM&V") contractor for evaluation purposes.
- Customer acknowledges AEP Texas will play no role in resolving any disputes that arise between Customer and EESP; however, Customer may register a complaint against EESP to the program manager's contact information located on the program website, www.aeptexas.com/energy-efficiency.
- If a subcontractor is used, EESP shall provide Customer an "All Bills Paid" affidavit guaranteeing that no mechanic's or materialmen's liens will be placed on Customer's property relating to the installation of energy efficiency measures pursuant to this Agreement. If a subcontractor is used, subcontractor must sign where indicated below.
- EESP will provide a complaint procedure for Customer to address performance issues by the EESP or subcontractor.
- Customer agrees, upon three (3) days' prior oral notice, to provide AEP Texas and the EM&V contractor selected by the PUCT with full and complete access to Customer's property for any purpose related to the SOP. The right of access will be subject to Customer's reasonable access requirements and, unless otherwise agreed, must occur within normal business hours.
- Customer affirms that the HVAC system(s) selected for replacement through the SOP was/were functional at the time of the assessment and the SOP aided in the decision to replace the system(s).

EESP: _____ Subcontractor: _____
(Signature) & (Date) (Signature) & (Date)

▶ Energy efficiency improvements agreed upon have been installed, and I have executed and been given a copy of the Agreement.

Customer: _____
(Signature - Customer or Authorized Representative) & (Date)

FIELD NOTES FORM EXAMPLE

Standard Offer Program
2025 Field Data Collection Form

Multiple Measures Residential Hard-to-Reach

Date: _____
 Project Sponsor: _____ Phone: _____
 Customer Name & Service Address: _____ Email Address: _____
 ESI ID #: _____
 Meter #: _____
 Home Phone: _____
 Cell Phone: _____

Building Type: Single-Family Mobile Home Duplex Multi-Family: Upper Lower Middle
 Number of Stories: _____ Sq. Ft. of Conditioned Space: _____ Gas appliances: Y N
 Number of Bedrooms: _____ Number of Occupants: _____
 Home Heating Type: Gas/Propane Electric Resistance Heat Pump Space Heating
 Home Cooling Type: Central AC Window Units: Evaporative cooling
 Water Heating Type: Electric Gas Heat Pump Water Heater

Duct and air leakage testing should not be conducted in homes where either evidence of asbestos, mold and/or other potentially hazardous material is present or suspected due to the age of the home. Blower door depressurization tests are prohibited if there is risk of asbestos becoming airborne and being drawn into conditioned space.

Duct Sealing, Unit #1 Pre-retrofit CFM₂₅: _____ Post-retrofit CFM₂₅: _____
 System cooling capacity TONS: _____
 Air handler location: _____
 Floor Area: _____
 Duct type: _____
 Foundation Type: _____
 # of Return Registers: _____
 Duct leakage areas treated: (Check all that apply)
 Registers Return Plenum Duct connections
 Duct holes/tears Other: _____

Duct Sealing, Unit #2 Pre-retrofit CFM₂₅: _____ Post-retrofit CFM₂₅: _____
 System cooling capacity TONS: _____
 Air handler location: _____
 Floor Area: _____
 Duct type: _____
 Foundation Type: _____
 # of Return Registers: _____
 Duct leakage areas treated: (Check all that apply)
 Registers Return Plenum Duct connections
 Duct holes/tears Other: _____

Air Infiltration
 Wind shielding: Well-shielded Normal Exposed
 Air infiltration measures installed: (Check all that apply)
 Number of Plumbing penetrations:
 Kitchen Bathroom #3
 Bathroom #1 Utility Room
 Bathroom #2 Other: _____
 Caulking:
 Windows, # of windows: _____ Exterior door(s), # of doors: _____
 Other areas. Describe: _____
 Light switch/outlet gaskets. # of light switch gaskets: _____ # of outlet gaskets: _____
 Trim & Baseboards Other air sealing measures. Describe: _____

Ceiling Insulation Project Sponsor affirms an insulation installation certificate was permanently affixed near the attic opening
 Insulation Type: None Cellulose Fiberglass Mineral fiber Rock wool batt
 Square feet of ceiling to be insulated (above conditioned space): _____ Insulation Condition: Good Fair Poor
 Existing R-value: _____ Existing insulation depth("): _____ Number of bags installed: _____
 Final R-value: _____ Final insulation depth("): _____
 Wall Insulation Wall cavity size: 2x4 2x6 Base insulation R-value: _____ Final R-value: _____
 Net wall area (gross wall area less window and door area), sq.ft.: _____ Installed insulation type: _____
 Floor Insulation
 Area above unconditioned space to be insulated, sq.ft.: _____
 Home type: Site built Manufactured

LEDs
 Total # of LEDs installed: _____
 Wattage of installed LEDs: _____
 Lumen output of installed LEDs: _____
 Wattage of replaced lamp: _____
 Rated lifetime of installed LEDs (hrs): _____
 Location(s) of installed LEDs:
 Kitchen _____ Dining Rm _____
 Bath #1 _____ Laundry Rm _____
 Bath #2 _____ Other _____
 Living Rm _____ Bedroom #2 _____
 Bedroom #1 _____ Bedroom #3 _____


Water Heating Measures (Electric Water Heating Only)
 Low-Flow Showerheads
 # of showerheads: _____ Flow rate (GPM): _____
 Water Heater Tank Insulation
 # of water heaters treated: _____ Water heater size (gal.): _____
 Insulation R-value: _____
 Faucet Aerators
 # of aerators: _____ Flow rate (GPM): _____
 Pipe Insulation
 # of electric WH treated _____ Insulation R-value: _____
 Wrapped length (ft.): _____ 6 ft. max.
 Pipe diameter: 1/2" 3/4" 1"

ENERGY STAR® Windows
 Existing window type: Single pane Double pane
 Window area sq.ft.: _____
 U-Factor: _____ Solar Heat Gain Coefficient: _____
 Window orientation: (mark all that apply)
 N or NE S or SW E or SE W or NW

ENERGY STAR® Air Purifiers
 Clean Air Delivery Rate (CADR in cu ft/min): _____ Quantity installed: _____
 Advanced Power Strips (APS)
 System type: Home entertainment Home office APS tier: 1 2 Quantity installed: _____
 System type: Home entertainment Home office APS tier: 1 2 Quantity installed: _____

Notes: (Please note any other relevant details that may assist with validating reported installations)

ENERGY EFFICIENCY FLYER



An **AEP** Company

Residential Energy Efficiency Program

AEP Texas Wants You to Know about Energy Efficiency!

- AEP Texas offers energy efficiency programs that provide incentives to participating contractors for the installations of eligible energy efficiency services and products in the homes of residential customers that are served by AEP Texas.
- AEP Texas contracts with national and local companies who may contact you about performing work to help save energy and reduce your electric bill.

If you choose to participate in a program:


- You decide what equipment will be installed and you choose what work the contractor you select will do.
- You and your contractor determine price, warranty and other concerns.
- Be sure you understand the terms of any agreement before signing and know how much you will pay.
- Request a copy of all paperwork.
- Understand you may be contacted by an AEP Texas representative for an inspection to verify the work was done.

If you have any questions about the program or the legitimacy of the contractor who provided this flyer to you, please contact:

Jordan Mendiola
EE & Consumer Program Coordinator
(361) 881-5859
jmendiola@aep.com



The contractor's name and phone number who provided this flyer to you is:

AEP Texas Service Territory



The sole purpose of this flyer is to let you know this program is in operation. It is not intended to imply an endorsement of this, or any other contractor.

For more information about energy efficiency programs offered by AEP Texas, please visit our website:
www.aeptxsaves.com



CUSTOMER EDUCATION MATERIAL



LEARN HOW TO SAVE ENERGY AT HOME

HOW WE USE ENERGY IN OUR HOMES



■ Space Heating & Cooling ■ Water Heating ■ Appliances ■ Lighting ■ Electronics

Source: Typical House Factoid Memo, Lawrence Berkeley National Laboratory, April 2013.

HELPFUL TIPS:

SPACE HEATING AND COOLING

- Install a programmable or smart thermostat to automatically adjust your home's temperature settings while you're away or sleeping. Resist the urge to override the temperature settings. If you have a heat pump, set the temperature and let it be. A heat pump is designed to maintain a steady temperature, working gradually and efficiently. Only use the Emergency Heat setting when the outdoor unit of your heat pump system is not working.
- Replace filters on your air conditioning system. Clean filters can lower the air conditioner's energy consumption.
- Caulk, seal, and weather-strip openings from your home to the outside.
- Increase your attic insulation if the joists are showing. Recommended level: R-38 or 10-16 inches blown.
- Open shades in the winter to let sunlight in. Close them in the summer to keep your home cooler.

WATER HEATING

- Wash full loads of laundry in cold water.
- Wash full loads of dishes in your dishwasher and use the energy saver selections on your dishwasher.
- Install low-flow showerheads throughout the home to reduce your hot water usage.



LEARN HOW TO SAVE ENERGY AT HOME

LIGHTING

- The best way to save on lighting is to turn off the lights you're not using.
- Replace incandescent lighting with ENERGY STAR® certified LEDs.

APPLIANCES

- Clean your dryer's lint filter after each use to improve air circulation and increase the efficiency of the dryer. This is also an important safety measure.
- Where and when possible, consider air-drying clothes on a clothesline instead of using a dryer.
- Keep the temperature in your refrigerator at 35° to 38° Fahrenheit.
- Set your water heater to between 120° and 130° Fahrenheit.

ELECTRONICS

- Unplug electronic devices when they're not in use.
- Plug your computer and peripherals into a power strip and shut them off using its on/off switch.
- When purchasing new electronics for the home, look for ENERGY STAR® qualified electronics.

For information about energy efficiency programs offered by AEP Texas, please visit our website:

www.aeptxsaves.com



MARKETING

- AEP Texas will NOT provide marketing assistance or endorsements
- Approved Project Sponsors:
 - are encouraged to use the one-page brochure provided by AEP Texas available on the program websites
 - are required to submit all other marketing material, including social media and telemarketing, for pre-approval prior to use
 - shall NOT represent themselves as employees of AEP Texas while conducting marketing activities
 - must comply with all the requirements of the National “Do Not Call” Registry and the Texas “No Call” lists



PROGRAM RES AND HTR TIMELINE

- Program Registration opens October 31st @10 am
- Installation of measures begins after:
 - Contract signed by both parties via DocuSign
 - Current meter calibration certificates are uploaded to P3 if applicable
 - Current Auto and General Liability COIs are uploaded to P3
 - Must have approved application status
 - 2025 HCA Forms, Customer Education Materials, Revised Income Eligibility Verification Forms, and Energy Efficiency Flyer

Programs	Start Date
Residential & Hard-to-Reach	January 9, 2025 @ 10:am CST
Program End Date	November 17 th , 2025

PROGRAM BUDGETS

- Budgets for the 2025 Residential and Hard-to-Reach Programs are as follows:

Program	Budget
AEP Texas - Central Division: RSOP	\$2,091,957
AEP Texas - Central Division HTR SOP	\$1,087,560
AEP Texas - North Division RSOP	\$500,000
AEP Texas - North Division HTR SOP	\$325,000

2025 INCENTIVE RATES CENTRAL

Measure Group	Measure	EUL	RSOP		HTR SOP	
			kW	kWh	kW	kWh
Lighting	LED	Var.	\$5.00/Lamp		\$5.00/Lamp	
HVAC	Duct Efficiency Improvement	18	\$542.50	\$0.32	\$552.50	\$0.32
	Duct Efficiency Improvement - Gas	18	\$542.50	\$0.32	\$552.50	\$0.32
	ENERGY STAR® Connected Thermostats	11	\$250/Thermostat			
Building Envelope	Air Infiltration	11			\$275	\$0.11
	Air Infiltration - Gas	11			\$285	\$0.12
	Attic Encapsulation	25	\$700/kW		\$0.24/kWh	
	Insulation (Ceiling, Wall & Floor)	25	\$600/kW		\$0.20/kWh	
	ENERGY STAR® Windows	25	\$4/Sqft.			

2025 INCENTIVE RATES CENTRAL

Water Heating	Low-Flow Showerheads	10	\$40/Showerhead	\$40/Showerhead		
	Heat Pump Water Heater	13	≥ 55 gal. \$850/Unit <55 gal. \$1100/Unit			
ENERGY STAR® Electric Vehicle Supply Equipment		10	\$15/Unit	\$15/Unit		
Water Heater Pipe Insulation		13	\$5.00	\$5.00		
ENERGY STAR® Ceiling Fan		10	\$25/Unit			
Solar Screens		10	\$3/Sqft.			
All Other Measures		<10	\$97	\$0.03	\$226	\$0.07
		≥10	\$195	\$0.06	\$330	\$0.10

2025 INCENTIVE RATES NORTH

Measure Group	Measure	EUL	RSOP		HTR SOP	
			kW	kWh	kW	kWh
Lighting	LED	Var.	\$5.00/Lamp		\$5.00/Lamp	
HVAC	Duct Efficiency Improvement	18	\$428.75	\$0.16	\$438.75	\$0.16
	Duct Efficiency Improvement – Gas	18	\$428.75	\$0.25	\$438.75	\$0.25
	ENERGY STAR® Connected Thermostats	11	\$250/Thermostat			
Building Envelope	Air Infiltration	11			\$275	\$0.11
	Air Infiltration – Gas	11			\$285	\$0.12
	Attic Encapsulation	25	\$700/kW		\$0.24/kWh	
	Insulation (Ceiling, Wall & Floor)	25	\$600/kW		\$0.20/kWh	
	ENERGY STAR® Windows	25	\$4/Sqft.			

2025 INCENTIVE RATES NORTH

Water Heating	Low-Flow Showerheads	10	\$40/Showerhead	\$40/Showerhead		
	Heat Pump Water Heater	13	≥ 55 gal. \$850/Unit <55 gal. \$1100/Unit			
ENERGY STAR® Electric Vehicle Supply Equipment		10	\$15/Unit	\$15/Unit		
Water Heater Pipe Insulation		13	\$5.00	\$5.00		
ENERGY STAR® Ceiling Fan		10	\$25/Unit			
Solar Screens		10	\$3/Sqft.			
All Other Measures		<10	\$97	\$0.03	\$226	\$0.07
		≥10	\$195	\$0.06	\$330	\$0.10

2025 INCENTIVE RATES CENTRAL AND NORTH

HVAC Incentive Rates (TCD and TND) - Replace on Burnout						
SEER2	RSOP			HTR		
	Central AC	Central HP	HP Replace ER Furnace	Central AC	Central HP	HP Replace ER Furnace
15.2 - 15.9	\$ 150	\$ 200	\$ 500	\$ 200	\$ 250	\$ 700
16 - 16.9	\$ 200	\$ 250	\$ 600	\$ 250	\$ 300	\$ 800
17 - 17.9	\$ 250	\$ 300	\$ 700	\$ 300	\$ 350	\$ 900
18 - 18.9	\$ 300	\$ 350	\$ 800	\$ 350	\$ 400	\$ 1,000
19 - 19.9	\$ 350	\$ 400	\$ 900	\$ 400	\$ 450	\$ 1,100
20 - 21.9	\$ 375	\$ 425	\$ 950	\$ 425	\$ 475	\$ 1,150
22+	\$ 400	\$ 450	\$ 1,000	\$ 450	\$ 500	\$ 1,200

• *\$ Per Ton

HVAC Incentive Rates (TCD and TND) - Early Retirement						
SEER2	RSOP			HTR		
	Central AC*	Central HP*	HP Replace ER Furnace*	Central AC*	Central HP*	HP Replace ER Furnace*
15.2 - 15.9	\$ 200	\$ 300	\$ 700	\$ 250	\$ 350	\$ 900
16 - 16.9	\$ 300	\$ 400	\$ 800	\$ 350	\$ 450	\$ 1,000
17 - 17.9	\$ 400	\$ 500	\$ 900	\$ 450	\$ 550	\$ 1,100
18 - 18.9	\$ 500	\$ 600	\$ 1,000	\$ 550	\$ 650	\$ 1,200
19 - 19.9	\$ 600	\$ 700	\$ 1,100	\$ 650	\$ 750	\$ 1,300
20 - 21.9	\$ 650	\$ 750	\$ 1,150	\$ 700	\$ 800	\$ 1,350
22+	\$ 700	\$ 800	\$ 1,200	\$ 750	\$ 850	\$ 1,400

*\$ Per Ton

2025 INCENTIVE RATES CENTRAL AND NORTH

New Construction (NC)

SEER2	RSOP AC	RSOP HP	HTR AC	HTR HP
15.2-16.1	\$120/ton	\$360/ton	\$240/ton	\$480/ton
16.2+	\$200/ton	\$400/ton	\$300/ton	\$500/ton

*\$ Per Ton

Tune Up	Incentive Rate
HVAC Tune-up AC	\$50/ton
HVAC Tune-up HP	\$75/ton

PROGRAM WEBSITES

- Program Manuals, Required Forms and other program related documents will be posted on www.aeptxsaves.com (goes live on January 1, 2025) and in P3 located in “program downloads & tools” section
- Previously approved 2024 Project Sponsors can use their P3 sign in credentials to review their required information
- First time applicants can register and submit enrollments by going to P3 database login links below:

AEP Texas aeptexas.p3.enertrek.com



CONTACT INFORMATION

Jordan Mendiola
AEP Texas Program Manager

361-881-5859 jmendiola@aep.com

COMMENTS AND QUESTIONS.....



CONCLUSION.....
THANK YOU FOR YOUR ATTENDANCE!
