

# Smart Thermostat Project Information Form



For Single Family, Multifamily and Manufactured Home Residential Customers

Instructions: Complete this form and submit it to the serving electric utility.

## HOUSEHOLD INFORMATION

Customer Name	Installation Address (Street, City, State, Zip)
Customer Phone	Home Type <input type="checkbox"/> Single Family <input type="checkbox"/> Manufactured Home <input type="checkbox"/> Multifamily
Installation Date:	Is this an existing or new home? <input type="checkbox"/> Existing <input type="checkbox"/> New Construction

## EXISTING EQUIPMENT INFORMATION

One Smart Thermostat per furnace or heat pump controlled with a limit of two per household.

Existing Equipment Information	Thermostat 1	Thermostat 2
What heating system is the thermostat controlling?	<input type="checkbox"/> Electric Forced Air Furnace <input type="checkbox"/> Air or Ground Source Heat Pump	<input type="checkbox"/> Electric Forced Air Furnace <input type="checkbox"/> Air or Water Source Heat Pump
Previous Thermostat Type (If previous thermostat contains mercury, contact your local waste management or <a href="http://www.thermostat-recycle.org">www.thermostat-recycle.org</a> for disposal locations.)	<input type="checkbox"/> Programmable <input type="checkbox"/> Manual <input type="checkbox"/> Other _____	<input type="checkbox"/> Programmable <input type="checkbox"/> Manual <input type="checkbox"/> Other _____

## NEW EQUIPMENT INFORMATION

Information	Thermostat 1	Thermostat 2
Thermostat manufacturer		
Thermostat model		
Thermostat serial number		
Who installed the thermostat?	<input type="checkbox"/> Homeowner <input type="checkbox"/> Contractor or Utility	<input type="checkbox"/> Homeowner <input type="checkbox"/> Contractor or Utility
The thermostat is on the BPA Qualified Products List available at: <a href="https://www.bpa.gov/EE/Sectors/Residential/Documents/Smart_Tstat_QPL.pdf">https://www.bpa.gov/EE/Sectors/Residential/Documents/Smart_Tstat_QPL.pdf</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No (If "No", project is not eligible for incentives)	<input type="checkbox"/> Yes <input type="checkbox"/> No (If "No", project is not eligible for incentives)
Thermostat settings reflect the local geographic area where it has been installed.	<input type="checkbox"/> Yes <input type="checkbox"/> No (If "No", project is not eligible for incentives)	<input type="checkbox"/> Yes <input type="checkbox"/> No (If "No", project is not eligible for incentives)
Occupancy detection has been set "ON" Reference program Qualified Product List for information on how to properly set occupancy detection.	<input type="checkbox"/> Yes <input type="checkbox"/> No (If "No", project is not eligible for incentives)	<input type="checkbox"/> Yes <input type="checkbox"/> No (If "No", project is not eligible for incentives)
If thermostat controls a heat pump, thermostat has been programmed to control a heat pump. Reference program Qualified Product List for information on how to properly set auxiliary heat control.	<input type="checkbox"/> Yes <input type="checkbox"/> No (If "No", project is not eligible for incentives)	<input type="checkbox"/> Yes <input type="checkbox"/> No (If "No", project is not eligible for incentives)

# Request for Taxpayer Identification Number and Certification

**Give Form to the  
requester. Do not  
send to the IRS.**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	Exempt payee code (if any) _____
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.	Exemption from FATCA reporting code (if any) _____
	<input type="checkbox"/> Other (see instructions) ▶ _____	(Applies to accounts maintained outside the U.S.)
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
6 City, state, and ZIP code		
7 List account number(s) here (optional)		

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

<b>Social security number</b>									
-				-					
<b>or</b>									
<b>Employer identification number</b>									
-									

## Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
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## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*