

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	Installation Date

EXISTING EQUIPMENT INFORMATION

One Smart Thermostat per furnace or heat pump controlled with a limit of two per household. BPA does not recommend installation of a third-party Smart Thermostat on a Variable-Speed Heat Pump (VSHP).

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

NEW EQUIPMENT INFORMATION

Information	Thermostat 1	Thermostat 2
Thermostat manufacturer		
Thermostat model		
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 installed thermostat must:

1. Be on the [BPA Smart Thermostat Qualified Products List](#)
2. Have on-board and/or external sensor occupancy detection set to on, and
3. If the thermostat controls a heat pump, be programmed with auxiliary heat control and optimization

Please return form to Oregon Trail Electric either via email (epsteam@otec.coop) or by dropping off at your local OTEC office. Please also include a copy of your invoice with make and model on the invoice.

****Dual-fuel heating systems (gas/oil/propane furnace with electric heat pump) do not qualify****

****Rebate will be credited to the OTEC account unless check marked**

Residential Advanced Smart Thermostat Qualified Products List

Updated 8/14/2024

Approved Qualified Products:

Manufacturer	Model Name	Model Numbers
ecobee	<ul style="list-style-type: none"> • ecobee 3 • ecobee 4 • ecobee Smart Thermostat with Voice Control (ecobee 5) • Smart Thermostat Premium (ecobee 6) • Smart Thermostat Enhanced 	<ul style="list-style-type: none"> • EB-STATE3***-## • EB-STATE4***-## • EB-STATE5* • EB-STATE6* • EB-STATE6L*
Nest	<ul style="list-style-type: none"> • Nest Learning Thermostat • Nest Thermostat E • Nest Thermostat 	<ul style="list-style-type: none"> • T3###** • T4###** • GA0####-** • GA05###-**
Lennox	<ul style="list-style-type: none"> • iComfort M30 Smart Thermostat 	<ul style="list-style-type: none"> • iComfort M30 Smart Thermostat
Honeywell (resido)	<ul style="list-style-type: none"> • T9 Smart Thermostat • T10 Pro Smart Thermostat 	<ul style="list-style-type: none"> • RCHT9610WFSW2003 • SMHOM9610KIT • THX321WFS2001W <p><small>Note: model numbers listed are for units packaged with external occupancy sensor</small></p>

BPA Smart Thermostat Specification:

In order for products to meet the standards of the qualified products list, they must have, at a minimum, the following:

- ENERGY STAR certification and additional information necessary to prove energy savings

OR

- Independent of manufacturer evaluation(s) demonstrating energy savings for smart thermostat



AND also have (in addition to evaluation or ENERGY STAR certification)

- 7-day programmable or learning-based scheduling
- Wi-Fi enabled, with remote access
- Built in occupancy sensor
- Plug-in occupancy sensor packaged with the wall unit
- Heat pump auxiliary heat control and optimization capabilities