



To apply for rebates through the Efficiency Arizona Program, applicants must provide documents showing proof of income and home ownership to show that they meet the low- or moderate-income requirements. For more information, visit efficiencyarizona.com/eligibility

1. Income Documentation

Applicants must verify income eligibility through one of the following two ways: Categorical Eligibility or Income Eligibility. Review the options below and select the one that best fits your situation. **Before you submit your income information, please verify everything is current and valid. Any expired or invalid information will slow down your approval process.**

Option A: Categorically Eligible Programs

Applicants participating in one or more of the listed approved programs may submit their eligibility determination letter for that program(s) dated within the last 12 months to show that they are eligible to apply for rebates through the Efficiency Arizona Program. The eligibility determination letter must clearly display the following details:

- Recipient's first and last name
- Recipient's address
- Program name
- Date of enrollment and/or enrollment expiration date

Note: If recipient is not the applicant, recipient must reside at the same address as the applicant.

Approved Programs for Categorical Eligibility:	
Food Distribution Program on Indian Reservations (FDPIR)	Medicaid - Arizona Health Care Cost Containment System (AHCCCS)
Head Start	National School Lunch Program – Free (NSLP)
Housing Improvement Program (HIP)	Public Housing (housing owned and operated by Public Housing Authorities)
Housing Opportunities for Person with AIDS	Supplemental Nutrition Assistance Program (SNAP)
Lifeline Support for Affordable Communications (Lifeline)	Supplemental Security Income (SSI)
Low Income Home Energy Assistance Program (LIHEAP)	Verified government or non-profit program serving Asset Limited Income Constrained Employed (ALICE) persons or households

Option B: Income Eligibility

If an applicant is not enrolled in a program listed above, then the applicant must provide the most recent 1040 tax form(s) for the household along with proof of filing. In addition to the 1040, any non-taxable income such as Child Support, Veteran's Benefits, or Worker's Compensation must be reported.

Documentation of non-taxable income must clearly display the following details:

- Name of issuing agency
- The household member's first and last name
- Date issued

Applicants only need to submit one document for each income type not accounted for on the 1040. Examples of income types, acceptable documentation, and acceptable date ranges are:

Income Type	Acceptable Documentation	Acceptable Date Range
Child Support	• Court Order • Pertinent pages of separation agreement • Divorce decree identifying the payee and amount of child support to be received • Bank statements	• Agreement must be active • Bank statements 30 days from the date of the application
Veteran's Benefits	• Award letter • Bank statements	• Award letter issued within the last 12 months • Checks/check stubs issued within the last 30 days
Workers Compensation	• Award letter from Workers' Compensation Board • 30 days' worth of pay stubs from the date of your application	• 60 consecutive days' or more worth of check stubs from the application date • Letter from pension board issued within the last 12 months

By Exception Request Only: Full Income Review

For applicants that do not participate in an approved program and who are unable to submit 1040 tax documents, an exception can be requested.

PLEASE NOTE: The exception process is significantly more involved, and additional processing time is required. Applicants who choose to request Full Income Verification Exception should expect to provide the following documentation:

- Two most recent months of proof of income (paystubs and additional acceptable documentation)
- Two most recent months of bank statements for every bank account

All income sources must be provided. The table below includes examples of income types along with the acceptable documentation and date ranges for each income source:

Income Type	Acceptable Documentation	Acceptable Date Range
Alimony	• Court Order • Pertinent pages of separation agreement • Divorce decree identifying the payee and amount of alimony to be received • Bank statements	• Agreement must be active • Bank statements 60 days from the date of the application
Annuity	• Form 1099 or 1040 • Award Letter • Statement of benefits	• Form 1099 or 1040 must be from the most recent tax year
Child Support	• Court Order • Pertinent pages of separation agreement • Divorce decree identifying the payee and amount of child support to be received • Bank statements	• Agreement must be active • Bank statements 60 days from the date of the application
Job Income	• Pay stubs • Employer income statement • W2s • Tax Return	• 60 consecutive days' or more worth of income issued within 60 days from the application date • W2s and tax return must be from the most recent tax year
Pension	• Pension check stub showing gross amount • Letter from Pension Board	• 60 consecutive days' or more worth of check stubs from the application date • Letter from pension board issued within the last 12 months
Rental Income	• Profit loss statement • Tax Form 1040 (Schedule 1 and E) • Notarized statement listing each apartment and rent received per month, as well as a description and amount of deductible expenses • Copy of lease(s) if annual documents are unavailable • Tax Form 1099	• Profit loss statements must be for at minimum the previous 3 months • 1040 must be from the most recent tax year • Lease must be issued within the last 12 months
Self- Employment Income	• Tax return • IRS report of quarterly earnings • Profit loss statement	• Tax return: most recent year • IRS report of quarterly earnings and profit loss statements must be for at minimum the previous 3 months

Option B: Income Eligibility (cont.)

Income Type	Acceptable Documentation	Acceptable Date Range
Social Security	- Award letter - Benefit statement - SSA-1099 social security benefit statement	- Award letter/benefit statement issued within the last 12 months - Tax documentation from the most recent tax year
Social Security Disability	- SSA benefit verification letter - SSA-1099 social security benefit statement - SSA Form 2458	- Benefit verification letter issued within the last 12 months - Tax documentation from the most recent tax year
Unemployment	- Award letter from Arizona Department of Economic Security 60 days' worth of paystubs from the date of your application Need help finding these documents? Visit: des.az.gov/services/employment/unemployment-individual	Award letter/benefit statement issued within the last 12 months
Workers Compensation	- Award letter from Workers' Compensation Board 60 days' worth of pay stubs from the date of your application	- Award letter issued within the last 12 months - Checks/check stubs issued within the last 60 days

2. Utility Information

Applicants must provide the most recent utility bill for each type of utility used in the home (electric or natural gas). Each document must include:

- Applicant's first and last name
- Address
- Account number
- Utility provider
- Monthly usage data
- Date

Applicants who receive delivered fuel such as propane must submit their most recent receipt. The receipt should include:

- Delivered fuel type
- Delivered fuel amount
- Address fuel was delivered
- Date fuel was delivered

3. Identification

Applicants are required to provide a valid form of identification. Accepted forms of identification are:

- An unexpired U.S. Photo Driver License (front and back)
- An unexpired U.S. Passport (ID page only)
- An unexpired Passport Card
- Government-issued ID (front and back)

4. Proof of Ownership

Applicants that own their home must provide one of the following documents that shows their name and property address:

- Deed
- Property tax statement
- Escrow analysis statement
- Mortgage promissory note
- Mortgage closing disclosure form
- Property insurance documentation

5. Proof of Residency

Applicants must provide valid proof of residency documentation issued within the last 60 days.

Acceptable documents include:

- Bank statement
- Pay stub
- Mortgage statement
- Utility bill – gas, electricity, water
- Doctor or hospital bill

The document must clearly show:

- Applicant's name
- Residential address
- Date document was issued
(must be within the last 60 days)

Need help?

Contact **EfficiencyArizona@resource-innovations.com** for a program representative to answer any questions you may have.