

LOW-INCOME DISCOUNT

Purpose

The purpose of this Schedule is to implement the Low-Income Discount for income qualified Residential Customers and General Service customers who qualify under Special Condition 10 of this tariff.

This discount is enabled by House Bill 2475 (2021 regular sessions), which modified ORS 757.230 to allow for differentiated rates for “low-income customers and other economic, social equity, or environmental justice factors that affect affordability for certain classes of utility customers.”

Available

To Residential Customers and General Service Customers who qualify under Special Condition 10 of this tariff and are served by the Company within its service territory.

Applicable

To income-qualified Residential Customers with gross household income at or below 60% of Oregon State Median Income (SMI) adjusted for household size. For Customers in single-person households, eligibility is extended to those with gross household incomes up to the greater of 60% SMI or full-time wages at Portland minimum wage. Also applicable to General Service Customers who qualify under Special Condition 10 of this tariff.

Monthly Billing

Income-qualified Residential Customers will receive a monthly bill discount at one of three levels based on the Customer’s household income as a percentage of SMI for the Residential Service Schedule charges for that Customer (Schedule 4 or 5). Customers with household incomes up to 5% of SMI will receive an 80% discount on their electric bill, customers with household incomes 6% to 20% of SMI will receive a 40% discount on their electricity bill and customers with household incomes between 21% and 60% will receive a 20% discount on their electricity bill. The monthly bill discount will be applied prior to taxes and will not apply to Schedule 300 charges.

General Service Customers who qualify under Special Condition 10 of this tariff will receive a 30% discount on their electricity bill. The monthly bill discount will be applied prior to taxes and will not apply to Schedule 300 charges. General Service Customers receiving this discount must meet and comply with the terms of Special Condition 10 of this tariff.

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Special Conditions

1. Customers receiving Low Income Home Energy Assistance Program (LIHEAP) or Oregon Energy Assistance Program (OEAP) funds automatically qualify for the bill discount. Low-income customers automatically enrolled for the discount whose household size and income are unknown to the Company will be placed in the 21-60% SMI tier and receive the 20% discount. The Customer may provide income information to be moved to a higher discount tier. Customers may also qualify for the bill discount by submitting an application self-declaring household size and income.
2. Household size reflects all permanent residents in the home, including adults and children.
3. Qualifying income refers to total gross annual income from all sources based on the number of persons in the household. Total gross income shall include income from all sources, both taxable and nontaxable.
4. The discount applies only to bills associated with the Customer's permanent primary residence and only to new charges billed after enrollment. Eligible Customers will receive the bill discount within one billing cycle of the receipt of application or receipt of LIHEAP/OEAP funds.
5. Re-enrollment will be required every two years. Customers receiving LIHEAP/OEAP will automatically be re-enrolled for two years following receipt of LIHEAP/OEAP funds.
6. The Company will randomly select 3% of enrolled Customers to provide post-enrollment verification to continue receiving this discount.
7. The Company may require post-enrollment verification from customers with excessive usage (greater than four times average residential customer usage) for them to continue receiving the discount.
8. It is the Customer's responsibility to notify the utility if there is a change in eligibility status.
9. If the Customer is removed from the program the Company will not seek to recover any benefits already provided to the Customer.

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Special Conditions (cont)

10. A master-metered building consisting of individual residential units that is served under a General Service rate schedule may receive the General Service discount shown in the Monthly Billing section of this tariff if it meets the following criteria:
- a. Master-metered customer must have 50% or greater of its dwelling units dedicated to occupants whose income is at 60% or less of area median income.
 - b. Master-metered customer must qualify as affordable housing with Oregon Housing and Community Services as defined in OAR 330-240-0070(1).
 - c. Master-metered customer must commit to pass its monthly bill discount back to its low-income occupants on a proportional basis.

Reporting

The Company will track and report information regarding the low-income discount with the Commission on a quarterly basis for the first calendar year and annually thereafter. The report will include, at a minimum, the total number of Customers enrolled in the program, total dollars provided to customers, and dollars spent on administrative costs.

Rates and Regulations

Service under this schedule is subject to the General Rules and Regulations contained in the tariff of which this schedule is a part and to those prescribed by regulatory authorities.