



United States

ENVIRONMENTAL PROTECTION AGENCY

Washington, D.C. 20460

ENERGY STAR Home Upgrade Service Provider Partner
Project Data Collection for Calendar Year XXXX
Office of Atmospheric Programs

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PARTNER NAME (Per your Partnership Agreement):

SUBMITTED BY (Your name):

IMPORTANT: Please read these instructions carefully before completing this form.

Beginning in 2025, ENERGY STAR requires project data submissions for projects completed under the ENERGY STAR Home Upgrade Service Provider Partnership. This information is used to measure the impact of the partnership, view trends in the installation of efficient products, and evaluate the overall performance of the program to create the most value for participants. Data shared to ENERGY STAR by partners helps to demonstrate the importance of ENERGY STAR in the market and the benefits created by partners. This requirement is outlined in the partner commitments referenced in the ENERGY STAR partnership agreement.

Partners are required to submit 2025 calendar year project data for ENERGY STAR certified products by completing the form(s) linked to below and sending it to EPA no later than March 1, 2026. Partners must include all projects completed following the 90 day onboarding period after a partnership agreement is signed by the EPA.

Service Provider Partners are required to submit the following data listed below, whether that is providing the exact fields in the sample collection form or other fields partners already use that capture this information. **Please let us know if you do not collect any of the requested information:**

- Census Tract Data (State Code, County Code, Tract Code left separate or combined) from output of batch address geograph This can be found by visiting the United States Census Bureau webpage and uploading the following fields in a batch spreadsheet
- Project ID (can just be 1,2,3, etc. or a company's own unique identifier)
- Street Address
- City
- State
- Zip Code (5 digit preferred, but can use 9 digit)
- Installation status of the following products:
 - o ENERGY STAR Certified Heat Pump (e.g., air-source or mini-split)
 - o Smart Thermostat
 - o ENERGY STAR Certified Heat Pump Water Heater
 - o ENERGY STAR Certified Windows
 - o Attic Sealing and Insulation
 - o Electrical Upgrades (e.g., wiring, panel upgrades, EV chargers, solar, other smart technology)
- Applied rebates
 - o Utility, state, manufacturer, distributor
- Financing used
 - o Mechanism (e.g., greenbank, traditional bank, etc.)

Submission Deadline: XXX, XX, XXXX

As stated on the form, partner companies must provide project data for all projects under an ENERGY STAR partnership completed within the United States from January 1, 2025 – December 31, 2025. Note:

- If an ENERGY STAR partnership was active for only part of the year, only count projects completed during that part of the year following the 90 day onboarding process after an agreement is executed by the EPA.
- To ensure no double counting occurs, do not report projects completed under another company's partnership.
- If a company completed no projects within the United States in 2025, it is still required to notify the EPA via email that it has completed zero projects.

Submission Deadline and Partnership Implications

As a term of partnership, the EPA collects unit and project data on an annual basis for program evaluation purposes. The EPA release this information only as aggregated data and otherwise only to the extent required by law.

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- If a company completed no projects within the United States in 2025, it is still required to notify the EPA via email that it has completed zero projects.

Thank you for supporting the ENERGY STAR program and for your cooperation with this important requirement.

EPA Form No. PFN-3400-2

OMB Control No. 2060-0528

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Expiration Date: Pending Approval

← Partner Name incomplete

← Submitted By incomplete

release this information only as aggregated data and

	Do Not Send - Use to Find Census Tract before Sending (Columns F-H)				
Project Number	Street Address	City	State	Zip Code	State Code

Census Tract		ENERGY STAR Cer		
County Code	Tract Code	Heat Pump (Air-source or Mini-split)	Cold-Climate	Dual-fuel

rtified Upgrades Made			
Smart Thermostat	Heat Pump Water Heater	Windows	# of windows

Attic Sealing	Attic Insulation	Electrical Upgrades

Electrical Upgrades

New Wiring Only	Panel Upsize	Service Upgrade Needed	Same Size Panel Replacement
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			Othe
Other smart techonology	EV Charger Added	Solar Added	Rebates applied for

er Upgrades Made	
Financing	Financing Mechanism

Drop downs

Can choose more than One						
General	Windows	Panels	other tech	EV Charge	Solar	Rebates
Yes	Windows	Traditional Panel	Smart Circuit	With new	With Batte	Utility
No	Storm Windows	Smart Panel	Load splitter	Without ne	Without B:	State
Unsure	No	No	Appliance with battery	No	No	Manufactu
	Unsure	Unsure	Meter socket adaptor	Unsure	Unsure	Distributor
			Other			Other
			No			No
			Unsure			Unsure

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By Project

Other Upgrades Up to Standard/Code for the location

Made in house, subcontracted, or refered (as long as project confirmed)