

Form 620U
Stand-Alone Incentive Application
ENERGY STAR® New Homes – Single Family

FastTrack ID
(program use only)



To be completed by Participant or Trade Ally contractor.

Portland Energy Conservation, Inc. (PECI), is a Program Management Contractor for Energy Trust of Oregon, Inc.

How did you hear about the Program?

Participant Information

Name			
Builder/Company (if applicable)			
Telephone	<input type="checkbox"/> cell <input type="checkbox"/> home <input type="checkbox"/> office	Email	
Mailing Address	City	State	Zip

Site Information

Project Address		City	State	Zip
Year Built	Installation Date	Type of Installation <input type="checkbox"/> New <input type="checkbox"/> Replacement	Total Building Square Footage	Number of Stories
Basement <input type="checkbox"/> None <input type="checkbox"/> Full <input type="checkbox"/> Partial	Central A/C <input type="checkbox"/> Yes <input type="checkbox"/> No		Home Heating System <input type="checkbox"/> Electric <input type="checkbox"/> Gas	
Hot Water System <input type="checkbox"/> Storage <input type="checkbox"/> Tankless	Water Heating Fuel <input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Solar Electric <input type="checkbox"/> Solar Gas			

Electric Utility (Account number as shown on statement or meter number required.)

Qualifying electric territory homes must have either PGE or Pacific Power as their electric provider.

<input type="checkbox"/> Pacific Power Account Number	or Meter Number
<input type="checkbox"/> PGE Account Number	or Meter Number

Gas Utility (Account or meter number required, if space provided.)

Qualifying gas territory homes must have either Cascade Natural Gas or NW Natural as their gas provider.

<input type="checkbox"/> Cascade Natural Gas Account Number	or Meter Number
<input type="checkbox"/> NW Natural Account Number	or Meter Number

In order to receive your incentive, complete this application in full and mail it, along with documentation of your purchase, to the address provided at the bottom of this form. Qualified documentation must include the model number, serial number and performance testing details in the form of a receipt, invoice or letter from your HVAC contractor or builder.

Incentives are available for products purchased, and work performed, after January 1, 2008 and on or before December 31, 2008 and must be submitted within 90 days from the date of installation or by January 1, 2009, which ever comes first.

Energy Trust will provide the stand-alone measure incentives described in this application, in accordance with this application and its terms and conditions, which are listed on page four of this application. Funds for stand-alone measures are limited, and available on a first-come, first-served basis. The total expected incentive amount listed on this application form will be paid to the Participant upon completion of installation of the measures in accordance with the terms and conditions as set forth and approval by Energy Trust.

All combustion equipment eligible for incentives must be vented outdoors. Unvented combustion equipment will not qualify. The program strongly recommends the use of sealed combustion equipment where air inlet pipes terminate directly outdoors.

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Incentives	Quantity	Incentive Amount	Total
Duct Sealing with Performance Testing* for <90% AFUE Gas Furnace		\$ 150	\$
90% AFUE Gas Furnace		\$ 150	\$
90% AFUE Gas Furnace and Duct Sealing with Performance Testing*		\$ 300	\$
80% AFUE High Efficiency Gas Fireplace		\$ 70	\$
.81 EF Tankless Water Heater (gas model only)		\$ 200	\$
Heat Pump Commissioning for Homes with a <8.5 HSPF Heat Pump		\$ 150	\$
Performance Tested Ducts* for Homes with a <8.5 HSPF Heat Pump		\$ 150	\$
Heat Pump Commissioning for Homes with a <8.5 HSPF Heat Pump and Performance Tested Ducts*		\$ 300	\$
8.5 / 9.0 HSPF Heat Pump with Commissioning		\$ 300	\$
Total Expected Incentive			\$

*Combustion Appliance Zone (CAZ) test is required for all Duct Sealing with Performance Testing measures. CAZ locations within unconditioned, ventilated attic spaces and/or zones with no atmospherically vented appliances are exempt.

Equipment Information

Verification Category	Type	Minimum Requirement	Actual Value	Equipment Details
Water Heater	Tankless (gas models only)	0.81 EF	EF	Brand Model # Serial #
Primary Heat Source	Gas Furnace	90% AFUE	AFUE	Brand Model # Serial # Btu/Hr ECM <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know Air Cleaner <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know
	Boiler	83% AFUE		
	Gas Fireplace	80% AFUE	AFUE	Brand Model # Serial #
	Heat Pump	8.5 HSPF 13 SEER	HSPF SEER	Brand Model # Serial # Btu/Hr Backup Fuel <input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Other
	Air Source or Geothermal	2.49 COP	COP	
Documentation for Heat Pump	Heat Pump Commissioning or Verification Paperwork	Must be attached	<input type="checkbox"/> Yes <input type="checkbox"/> No	

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Performance Testing & Duct System Information (To be completed by certified participant or trade ally contractor.)

Ducts Duct leakage must not exceed 0.06 CFM@50 x floor area, or 75 CFM@50, whichever is greater. When tested without the air handler, leakage must not exceed 0.04 CFM@50 x floor area, or 50 CFM@50, whichever is greater. Multiple tests may be required.				
Performance Testing Company		Technician Name		Test Date
Whole House Leakage:	Air Changes per Hour (ACH) @ 50Pa	Cubic Feet Per Minute (CFM) @ 50Pa	Duct Leakage:	Cubic Feet Per Minute (CFM) @ 50Pa
Air Handler In Conditioned Space <input type="checkbox"/> Yes <input type="checkbox"/> No		Air Handler Present During Test <input type="checkbox"/> Yes <input type="checkbox"/> No		
Fan Pressure Gauge <input type="checkbox"/> DG3 <input type="checkbox"/> DG700	Fan Pressure	Ring Type <input type="checkbox"/> 0 <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	Leakage Test Method <input type="checkbox"/> Total Leakage <input type="checkbox"/> Leakage to Outside	
Duct Blaster Location		Pressure Tap Location		Area Tested
Duct Insulation R-		Duct Sealing (<i>Mastic</i>) <input type="checkbox"/> Yes <input type="checkbox"/> No		
Net CAZ Pressure (required) Pa				
<i>Forced air system operation must not depressurize Combustion Appliance Zone (CAZ) by more than 3 Pascals (Pa.)</i>				

By my signature below, I certify that I have read, understand, and agree to the terms and conditions set forth on *this form*. I represent to Energy Trust that the energy-saving measures have been completed and that I am eligible to receive the requested incentives.

Participant Name	Participant Signature	Date
FACSIMILE SIGNATURES: Facsimile transmission of any signed original document, and the retransmission of any signed facsimile transmission, shall be the same as delivery of the original signed document. Scanned signatures sent via email shall be the same as delivery of the original signed document. At the request of Energy Trust, a Party shall confirm documents with a facsimile transmitted signature or a scanned signature by signing an original document.		

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Terms and Conditions

- APPLICATION:** All incentive applications must be filled out completely, truthfully, and accurately. Participant is advised to retain a copy of all applications and any accompanying documentation submitted to Energy Trust under this program. Energy Trust will not be responsible for lost documentation. Incentives are available for products purchased, and work performed, after January 1, 2008 and on or before December 31, 2008 and must be submitted within 90 days from the date of installation or by January 1, 2009, whichever comes first. Funds for the Incentives are limited and available on a first-come first-served basis. Details of this program, including incentive amounts, are subject to change without prior notice.
- ELIGIBILITY:** Incentives are available to Oregon residential electric service customers of Portland General Electric (PGE) and Pacific Power and Oregon residential natural gas service customers of Cascade Natural Gas or NW Natural. Select incentives are available for Oregon customers of Avista. Incentives for energy savings measures or services are available to builders, HVAC contractors of consumers but more than one recipient will not be paid for the same equipment or service. Incentives for stand-alone incentives may also be rejected when the same service or equipment is payable as part of an incentive package paid for an ENERGY STAR home. Incentives for measures on homes that are heated with electricity must be within the PGE or Pacific Power territory, and incentive for measures on homes that are heated with natural gas must be within Avista, Cascade Natural Gas or NW Natural territory.
- VERIFICATION AND INSPECTION:** All required information must be filled out in its entirety and documentation including model number, serial number and performance testing labor performed provided as required by the program. Should an Applicant's site be chosen for a post-construction quality assurance review, satisfactory completion of that review must occur before payment. This review is for the purpose of verifying information before incentive payment only. No warranty is implied by reason of a participation in this program or by reason of any review by the ENERGY STAR New Homes program.
- PAYMENT:** The Incentives will be promptly paid on (i) installation of the energy saving measures, (ii) verification of the measures, and (iii) submission and approval of the completed Stand-Alone Incentive Application. Please allow up to 45 days for receipt of payment after receipt. Payments will be made to the Applicant.
- INCENTIVE AMOUNT:** Incentives are limited to the reimbursement of purchase of energy savings measures as set forth in this Application. Incentives paid to the Applicant will not exceed the lesser of (i) actual cost of the products purchased pursuant to the energy efficiency specifications for any energy saving measure Applicant performs, or (ii) the maximums set forth in this Application.
- INFORMATION RELEASE:** The Applicant understands and agrees that Energy Trust and/or its representatives may include a description of this project, including the Applicant's name, the Applicant's company name, services provided, project cost and energy savings, in reports, studies, and other documentation required by Energy Trust's Board of Directors, the Oregon Public Utility Commission, the Oregon Department of Energy and the Oregon Legislature. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate.
- TAX LIABILITY:** Energy Trust is not responsible for any tax liability, which may be imposed on the Participant as a result of payment of any incentives or as a result of obtaining financing. Energy Trust is not providing tax advice, and any communication by Energy Trust is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.
- SAFETY AND BUILDING CODES:** Applicant represents that: i) all equipment installed and work performed complies with all federal, state, and local safety, building and environmental codes, and ii) all equipment is UL listed and installed per manufacturer's instructions.
- NO ENDORSEMENT:** Energy Trust does not endorse any particular manufacturer, contractor, or equipment. The fact that the names of particular manufacturers, contractors, equipment or systems may appear on this Application does not constitute an endorsement. Manufacturers, contractors, equipment, or systems not mentioned are not implied to be unsuitable or defective in any way.
- PROPERTY RIGHTS:** Applicant represents that Applicant has the right to perform the energy savings measures on the property on which those measures are performed and that any necessary landlord's consent has been obtained.
- ACCESS AND EVALUATION:** Energy Trust and/or its representatives may request access to the property and may review and evaluate the project during and after completion. Applicant hereby agrees to provide reasonable access to the property for the purposes described herein.
- ENERGY INFORMATION RELEASE:** Participant authorizes Energy Trust to access energy usage data relating to the property on which energy savings measures have been completed and/or installed by accessing the electric and natural gas accounts at the physical address of the project. Participant agrees to provide other reasonable assistance to Energy Trust to obtain such information.
- ELIGIBLE EQUIPMENT:** To be eligible for the incentive, equipment must meet the criteria indicated on the incentive application form(s). To be eligible for a service incentive, the work must be in accordance to the guidelines set forth in the ENERGY STAR Homes Northwest Certification Requirements by an Energy Trust approved trade ally. If you or your contractor is not sure of the specifications and would like to become an approved contractor, please call Energy Trust before proceeding.
- DISCLAIMER / NO LIABILITY:** Applicant understands that, while Energy Trust is providing Applicant with funding for the incentives payment, Energy Trust is not supervising work performed for Applicant nor is Energy Trust responsible in any way for proper completion of that work or proper performance of any equipment purchased. Energy Trust is simply providing funding to assist Applicant in implementing energy savings measures. Energy Trust does not guarantee any particular energy savings results by its approval of the Application or by any other of its actions.
- SURVIVAL OF TERMS AND CONDITIONS:** Unless stated otherwise in this document, regardless of whether or not this application is approved, these terms and conditions shall survive the payments of any incentive payments provided hereunder.