


Want your incentive faster?
 Apply online.
 Visit www.energytrust.org/now

Steps to completion:

- 1 Make** an energy saving improvement in an existing single family home.
- 2 Complete** application information, including:
 - Contractor **and** customer signatures
 - Invoices billing the customer for purchase and install marked "Paid in full"
 - Supporting documentation (*if applicable*)
- 3 Submit** online form or mail, fax or email documentation together to:
Energy Trust of Oregon Residential
 818 SW 3rd Ave, #215
 Portland, OR 97204
 1.866.311.1822 phone
 1.866.516.7592 fax
residentialforms@energytrust.org
- 4 Receive** your check. Please allow six to eight weeks for incentive processing after completed application and supporting documentation are received.

Need-to-know information:

- This form should be completed by the customer **and** contractor.
- Energy Trust must receive applications within **60 days** from the date of installation.
- All information must be completed for processing; incomplete information will result in delayed payment or disqualification.**

Customer Information

This home is Owner occupied A rental property I own*

**If the home is a rental property, a W-9 is required. Visit www.energytrust.org/w9.*

Promo Code
(optional)

Site address _____ City _____ State OR Zip _____

Mailing address (*if different than site*) _____ City _____ State OR Zip _____

Primary phone Home Work Cell Other Phone _____ Home Work Cell

Utility Information

Electric utility: PGE Pacific Power Other _____


Gas utility: NW Natural Cascade Natural Avista Other _____

Site Information

Year built	Square feet	Number of levels
Primary heating system (check one)	<input type="checkbox"/> Electric furnace	<input type="checkbox"/> Ductless heat pump
	<input type="checkbox"/> Electric baseboard	<input type="checkbox"/> Gas furnace
	<input type="checkbox"/> Ducted heat pump	<input type="checkbox"/> Gas fireplace
		<input type="checkbox"/> Wood
		<input type="checkbox"/> Propane
		<input type="checkbox"/> Other _____
Water heating fuel	<input type="checkbox"/> Electricity	<input type="checkbox"/> Natural gas
Foundation/ basement	<input type="checkbox"/> Crawlspace no vapor barrier	<input type="checkbox"/> Full basement
	<input type="checkbox"/> Crawlspace w/ vapor barrier	<input type="checkbox"/> Half basement
	<input type="checkbox"/> Garage/basement combo	<input type="checkbox"/> Other _____
Is this a manufactured home?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Customer Name and Signature

By signing below, Customer agrees to the terms and conditions of this application and authorizes Contractor to submit this application and all required invoices or measure documentation to Energy Trust on Customer's behalf for all Energy Trust incentives that are available for the energy-saving measures that Contractor has completed for Customer. By that authorization, Customer represents to Energy Trust that all measures have been completed satisfactorily as of the signature date below, and that any accompanying invoices or measure documentation are complete and accurate.




Customer signature _____ Full name (please print and use same name as on invoice) _____ Date _____

Customer email address (application status updates are sent via email) _____

Contractor Name and Signature

By signing below, Contractor certifies that this application and any accompanying invoices or measure documentation are complete and accurate, and that all improvements associated with this incentive request were completed as of the signature date below. Incentives are payable to Customers only. To receive incentives, all work must comply with Existing Homes' [Specifications Manual](#) and [program incentive guides](#) found on Energy Trust's website.



Contractor signature _____ Full name (please print) _____ Date _____

Contractor company _____ OCCB# (Non-trade ally only) _____ Install date _____

Project meets Home Performance with ENERGY STAR requirements. BPI technician (print name) _____

Oregon Residential, Contractor Install

Residential | Incentive Application | Form 320c



Previous Heating System Information

Heating system replaced N /A Electric baseboard Electric furnace Heat pump Propane heat
 (check one) Gas fireplace Gas furnace Hydronic (boiler) Wood heat Other _____

Ductless Heat Pump Incentive *One incentive per residence.*

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Ductless heat pump	HSPF of 9.0 or greater and must replace electric resistance as the home's primary heating system. Must be an inverter-driven model.	\$800
Qty of outdoor units	Qty of indoor units	Total capacity
		HSPF
		Installed Cost \$
Outdoor unit ¹	Manufacturer	Model
		Serial #
Indoor unit ¹	Model	

¹ Energy Trust incentive is intended to offset the cost of one outdoor unit and one indoor unit; additional units are unlikely to produce significant additional energy savings. If more than one outdoor and/or indoor unit is installed, please provide information for the highest capacity unit.

Ducted Heat Pump Incentive

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Ducted heat pump	HSPF 8.5 or greater. Additional incentives are also available for installing new heat pump controls, see qualifications in section below. Must be home's primary heat source and replace electric resistance heat (baseboard, wall heaters, electric furnace).	\$700
HSPF	EER	SEER
		Installed Cost \$
Manufacturer	Model	Serial #

Heating Controls Incentives

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> New heat pump controls	Can be combined with ducted heat pump incentive. Must be added to a new heat pump with electric furnace auxiliary heat. Heat pump must be home's primary heat source. Visit http://www.energytrust.org/heatpumpcontrols for eligible models and more information. Thermostat must be set to 35°F lockout or as close as possible. Cannot be combined with other controls incentives.	\$250
<input type="checkbox"/> Existing heat pump controls	Must be added to an existing heat pump with electric furnace auxiliary heat. Heat pump must be home's primary heat source. Visit http://www.energytrust.org/heatpumpcontrols for eligible models and more information. Thermostat must be set to 35°F lockout or as close as possible. Cannot be combined with other controls incentives or ducted heat pump incentive.	\$250
<input type="checkbox"/> Smart thermostat	Home must be heated by an electric furnace, gas furnace, or ducted heat pump with an electric furnace. Thermostat must be connected to the internet through a Wi-Fi network and configured with the home's location. Eligible models are Nest Learning Thermostat, Nest Thermostat E, ecobee3, and ecobee4. Cannot be combined with other controls incentives.	\$50
Thermostat	Lockout temperature set to 35° F? <input type="checkbox"/> Yes <input type="checkbox"/> No	Installed Cost \$
	Manufacturer	Model Name
		Model #

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Gas Heating Incentives <i>A CO monitor is required on every floor with a bedroom.</i>		
Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Gas fireplace	FE of 75% or greater with electronic pilot ignition. For a list of eligible models visit www.energytrust.org/fireplace .	\$250
	FE of 70% or greater with electronic pilot ignition. For a list of eligible models visit www.energytrust.org/fireplace .	\$150
<input type="checkbox"/> Gas boiler	AFUE of 88% or greater. Boiler must be the home's primary heat source.	\$200
<input type="checkbox"/> Gas furnace	Available for Avista customers only. Must be installed on or before 03/31/2018. AFUE of 90% or greater. Furnace must be the home's primary heating source.	\$200
FE (fireplace) %	AFUE (boiler or furnace) %	Installed cost \$
Manufacturer	Model	Serial #

Insulation Incentives <i>For self-installed projects, apply online or use Form 320S</i>						
Upgrade type <i>(max. beginning R-value)</i>	Installed cost	Beginning R-value	Ending R-value	Cavity filled	Quantity installed	Incentive amount
<input type="checkbox"/> Attic insulation (R-18)	\$	R-	R-	<input type="checkbox"/>	sq. ft.	\$0.25 per sq. ft.
	<ul style="list-style-type: none"> • If beginning R-value is between R-13 and R-18, maximum attic insulation incentive is \$100. • Electric and gas heated rental homes receive \$0.50 per sq. ft. if beginning R-value is ≤ R-12. 					
<input type="checkbox"/> Wall insulation (R-4)	\$	R-	R-	<input type="checkbox"/>	sq. ft.	\$0.30 per sq. ft.
	<ul style="list-style-type: none"> • Maximum wall insulation incentive for homes heated with gas is \$150 and application must also include a qualifying attic insulation upgrade. • Electric and gas heated rental homes receive \$0.50 per sq. ft. with no maximum or attic 					
<input type="checkbox"/> Floor insulation (R-0 if site built, R-11 for manufactured homes)	\$	R-	R-	<input type="checkbox"/>	sq. ft.	\$0.30 per sq. ft.
	<ul style="list-style-type: none"> • Maximum floor insulation incentive for homes heated with gas is \$150 and application must also include a qualifying attic insulation upgrade unless the site is a manufactured home. • Electric and gas heated rental homes receive \$0.40 per sq. ft. with no maximum or attic 					
<input type="checkbox"/> Knee wall insulation ¹ (R-4)	\$	R-	R-	<input type="checkbox"/>	sq. ft.	\$0.30 per sq. ft.
<input type="checkbox"/> Rim joist insulation (R-4)	\$	R-	R-	-	sq. ft.	\$0.30 per sq. ft.
<input type="checkbox"/> Boiler pipe insulation (R-2)	\$	R-	R-	-	ft.	\$0.50 per ln. ft.

¹ Existing attic insulation must be R-19 or higher for knee wall insulation to be incentivized on its own. See AT 2.6 at www.energytrust.org/ehspecs.

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Window Incentives <i>Windows must be installed by an OCCB licensed contractor in a heated area of the home.</i>					
Window type	Installed cost	U-Value	Total area installed	Total # of windows installed	Incentive amount
<input type="checkbox"/> U-Value ≤ 0.27	\$	U-.	sq. ft.		\$4.00 per sq. ft.
<input type="checkbox"/> U-Value 0.28 - 0.30	\$	U-.	sq. ft.		\$1.75 per sq. ft.
<u>Supporting documentation must be attached to all window applications:</u> <ul style="list-style-type: none"> • Proof of U-Value for each window • Proof of size for each window • Paid in full purchase and install invoicing <u>Incomplete documentation will result in delayed payment or disqualification.</u>		<input type="checkbox"/> Accepted proof of U-Value:	Attach copies of the NFRC stickers for all windows installed <u>OR</u> the window manufacturer's packing slip with U-Values listed for all windows installed.		
		<input type="checkbox"/> Accepted proof of size:	Attach an itemized invoice showing window dimensions from manufacturer, distributor, retailer or contractor for all windows installed <u>OR</u> a completed Windows Addendum form.		

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Terms and Conditions

APPLICATION: This application and any required additional documentation must be filled out completely, truthfully and accurately. Customers may wish to retain a copy of this application and any accompanying documentation submitted to Energy Trust under this program. Energy Trust will not be responsible for lost documentation pertaining to this application request. **The Residential program must receive applications within 60 days after the date of installation.** Incentives offers are subject to funding availability and may change. **Incentive amounts are valid through December 31, 2018. Please allow six to eight weeks for incentive processing.**

ELIGIBILITY: Incentives are available to approved Customers who are: (i) Oregon residential electric service customers of Portland General Electric or Pacific Power, and/or (ii) Oregon residential natural gas service customers of NW Natural, Cascade Natural Gas or Avista. Incentives for energy-saving measures that help save on the cost of home heating are available to PGE and Pacific Power customers who heat their homes with electricity and to NW Natural, Cascade Natural Gas or Avista customers who heat their homes with natural gas. Incentives for energy-saving measures that help save on the cost of water heating are available to PGE and Pacific Power customers who heat their water with electricity and to NW Natural, Cascade Natural Gas or Avista customers who heat their water with natural gas. Final determination of eligibility shall rest solely with Energy Trust.

ELIGIBLE MEASURES: Measures must meet Energy Trust energy-efficiency specifications. These specifications may be found on the web at www.energytrust.org and are subject to change. If you, or your contractor, are not sure of the specifications, please call Energy Trust before proceeding.

WORK QUALITY VERIFICATION: Prior to any payment of incentives, Customer's contractor will verify that the installed energy-saving measures meet Energy Trust of Oregon specifications (as defined by Building Performance Institute and the current Energy Trust Specification Manual). Outdoor temperatures may affect this verification process. Customer's home may also be selected for a quality control post-installation visit. No warranty is implied by this work quality verification.

PAYMENT: Incentives will be paid after: (i) completion and/or installation of the energy-saving measures, (ii) verification of the completion and/or installation of the measures, and (iii) timely submission of all required documentation of measures. Incentives will be paid directly to Customer. For all measures except approved self-installation projects, measures must be installed by an Energy Trust trade ally contractor or any other licensed contractor with a current Oregon Construction Contractors Board (CCB) license.

PROOF OF PURCHASE: The invoice documentation accompanying this application must **itemize** the products purchased and/or work performed. This proof of purchase must show a description of any installation or other labor charges, and the invoice is paid in full.

INCENTIVE AMOUNT: Incentive amount cannot exceed total installed cost. Incentives for energy-saving measures completed and/or installed as set forth in documentation accompanying this application are limited to the amounts provided by Energy Trust. Such amounts are subject to change. Current incentive amounts are identified on the web at www.energytrust.org. Contact Energy Trust with any questions.

TAX LIABILITY: Energy Trust is not responsible for any tax liability, which may be imposed on the Customer 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.

FACSIMILE/SCANNED: Facsimile transmission of any signed original document, and the retransmission of any signed facsimile transmission, are the same as delivery of the original signed document. Scanned original documents transmitted to Energy Trust as an attachment via electronic mail are the same as delivery of the original signed document. At the request of Energy Trust, Customer shall confirm documents with a facsimile transmitted signature or a scanned signature by providing the original document.

SAFETY AND BUILDING CODES: Customer represents that, with respect to the products and work performed identified in the documentation accompanying this application: (i) all products installed and work performed complies with all federal, state and local safety, building and environmental codes, and (ii) products are UL listed, if applicable, and installed per manufacturer's instructions.

NO ENDORSEMENT: Energy Trust does not endorse any particular manufacturer, contractor, or product in promoting the Residential program. The fact that the names of particular manufacturers, contractors, products, or systems may appear on this application does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.

PROPERTY RIGHTS: Customer represents that Customer has the right to complete and/or install the energy-saving measures on the property on which those measures are completed and/or installed 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 on which energy-saving measures have been completed and/or installed and may review and evaluate the project during and after completion. Customer agrees to provide reasonable access to the property for the purposes described herein.

DISCLAIMER/NO LIABILITY: Customer understands that, while Energy Trust may provide Customer with an incentive payment, Energy Trust is not supervising work performed for Customer nor is Energy Trust responsible in any way for proper completion of that work or proper performance of any products purchased. Energy Trust is simply providing funding to assist Customer in implementing energy-saving measures. Customer assumes the risk of any loss or damage(s) that Customer may suffer in connection with installation of the measures. Energy Trust does not guarantee any particular energy-saving results by its approval of the application or by any other of its actions.

ENERGY INFORMATION RELEASE: Customer authorizes Energy Trust to access utility energy usage data relating to the property on which energy-saving measures have been completed and/or installed by accessing the electric and natural gas accounts at the physical address of the project. Customer agrees to provide other reasonable assistance to Energy Trust to obtain such information.

INFORMATION RELEASE: Customer agrees that Energy Trust may include Customer's name, Energy Trust services and resulting energy savings in reports or other documentation submitted to Energy Trust, its Board of Directors, the Oregon Legislature, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing & Community Services, and/or the Oregon Legislature. Energy Trust will treat all other information gathered as confidential and report it only in the aggregate.