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| **Customer Information**  |

This home is: [ ]  Owner occupied [ ]  A rental property I own\*

**Want your incentive faster?**

Apply online.

Visit [**www.energytrust.org/now**](http://www.energytrust.org/now)

**Steps to completion:**

1. **Call** Energy Trust to prequalify for self-installed upgrades at 1.866.311.1822.
2. **Make** an eligible energy efficiency upgrade.
3. **Complete** application information, including:
* Customer signature
* Ensure work complies with [Residential Specifications Manual](https://energytrust.org/wp-content/uploads/2022/07/2022-Specifications-Manual_WEB.pdf)
* Attach receipts showing purchase of materials and/or equipment
1. **Submit** online form or mail or email documentation together to:

**Energy Trust of Oregon**

**Residential**

1819 SW 5th Ave #331

Portland, OR 97201

1.866.311.1822 phone

residentialforms@energytrust.org

1. **Receive** your check.
	* Please allow four to six weeks for incentive processing after completed application and supporting documentation are received.

**Need-to-know information:**

* 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 of the incentive.**
* **Incentives are intended for the purchase price of energy upgrade materials only.**
* **Contáctenos para obtener una versión en español de esta aplicación.**

\****If the home is a rental property and the owner or manager is receiving the incentive directly, a complete, accurate, and verifiable W-9 is required. Visit*** [***www.energytrust.org/w9***](http://www.energytrust.org/w9)***.***

Site address City State Zip

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

Primary phone [ ]  Home [ ]  Work [ ]  Cell Other Phone [ ]  Home [ ]  Work [ ]  Cell

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| **Utility Information** |

Electric utility: [ ]  PGE [ ]  Pacific Power [ ]  Other

Gas utility: [ ]  NW Natural [ ]  Cascade Natural Gas [ ]  Avista [ ]  Other

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| **Site Information** |
| Year built |  | Square feet |  | Number of levels |  |
| Primary heating system ***(check one)*** | [ ]  Electric furnace [ ]  Ductless heat pump [ ]  Wood[ ]  Electric baseboard [ ]  Gas furnace [ ]  Propane[ ]  Ducted heat pump [ ]  Gas fireplace [ ]  Other        |
| Water heating fuel | [ ]  Electricity [ ]  Natural gas [ ]  Propane |
| Foundation/basement | [ ]  Crawlspace no vapor barrier [ ]  Full basement[ ]  Slab on grade [ ]  Crawlspace w/ vapor barrier[ ]  Half basement [ ]  Garage/basement combo[ ]  Other        |
| Home type (Oregon):[ ] Single-family[ ] Manufactured | Home type (Washington):[ ] Single-family [ ] Manufactured [ ] Rowhouse [ ] Townhouse[ ] Duplex [ ] Triplex [ ] Fourplex  |
| For more information about Oregon multifamily incentives, including stacked units, visit [www.energytrust.org/multifamily](http://www.energytrust.org/multifamily) |

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| **Customer Name and Signature** |
| *By signing below, Customer agrees to the terms and conditions of this application. Customer represents to Energy Trust that all upgrades have been completed satisfactorily as of the signature date below, and that any accompanying invoices or upgrade documentation are complete and accurate. If Customer identifies as a landlord or property owner applying for a single-family rental property incentive, Customer affirms that they own and do not reside in the property. To receive incentives, all work must comply with the* [*Residential Specifications Manual*](https://insider.energytrust.org/wp-content/uploads/2023-English-Specifications-Manual.pdf) *and all other Energy Trust program requirements.* |
|               **Customer signature**  **Full name** (please print) **Date** |
|               **Email address**(application status updates are sent via email) **Install date** |

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| **Insulation Incentives for Single-Family Homes *For professionally installed projects,*** [**apply online**](https://www.energytrust.org/now) ***or use*** [**Form 320C-WX**](https://www.energytrust.org/wp-content/uploads/2019/12/HES_FM0320C-WX.pdf)**. *Oregon residences must be primarily heated by Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Washington residences must be primarily heated by NW Natural.*** |
| Attic, wall and floor insulation projects are available at an increased incentive amount for income-qualifed Oregon residents through Savings Within Reach. Visit [www.energytrust.org/savingswithinreach](http://www.energytrust.org/savingswithinreach) for more details. |
| **Insulation type\*** | **Max beginning R-value** | **Insulate****to:** | **Quantity installed** | **Beginning****R-value** | **Ending****R-value** | **Cavity****filled?** | **Installed cost** | **Incentive per sq. ft** |
| **Oregon** | **Washington** |
| **Owner Occuppied** |  **Rental** | **All Resident Types** |
| Knee wall: 2x4 cavities | R-4 | R-15 or fill cavity |       sq.ft. | R-    | R-    | [ ]  | $      | **$1.50** | **$2.25** | **$1.25** |
| Knee wall: 2x6 cavities | R-4 | R-21 or fill cavity |       sq.ft. | R-    | R-    | [ ]  | $      | **$1.50** | **$2.25** | **$1.25** |
| **Attic insulation must be R-19 or higher in order for knee wall insulation to be eligible.** |
| Attic | R-18 | R-38 |       sq.ft. | R-    | R-    | [ ]  | $      | **$1.25** | **$1.50** | **$1.25** |
| Floor | R-0 | R-30 or fill cavity |       sq.ft. | R-    | R-    | [ ]  | $      | **$0.75** | **$1.00** | **$1.25** |
| \*All exterior wall surfaces must be insulated to qualify for wall insulation. |

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| **Insulation Incentives for Manufactured Homes *For professionally installed projects,*** [**apply online**](https://www.energytrust.org/now) ***or use*** [**Form 320C-WX**](https://www.energytrust.org/wp-content/uploads/2019/12/HES_FM0320C-WX.pdf)**. *Oregon residences must be primarily heated by Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Washington residences must be primarily heated by NW Natural.*** |
| Attic, wall and floor insulation projects are available at an increased incentive amount for income-qualifed Oregon residents through Savings Within Reach. Visit [www.energytrust.org/savingswithinreach](http://www.energytrust.org/savingswithinreach) for more details. |
| **Insulation type** | **Max beginning R-value** | **Insulate****to:** | **Quantity installed** | **Beginning****R-value** | **Ending****R-value** | **Cavity****filled?** | **Installed cost** | **Incentive per sq. ft** |
| **Oregon** | **Washington** |
| **Owner Occuppied** |  **Rental** | **All Resident Types** |
| Attic | R-18 | R-30 or fill cavity |       sq.ft. | R-    | R-    | [ ]  | $      | **$1.25** | **$1.50** | **$1.25** |
| Floor | R-0 | R-22 or fill cavity |       sq.ft. | R-    | R-    | [ ]  | $      | **$0.75** | **$1.25** | **$1.25** |

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| **Smart Thermostat Incentive *Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Washington residences must be primarily heated by NW Natural.*** |
| **Upgrade type** | **Requirements** | **Incentive amount** |
| [ ]  | Smart thermostat | Residence must be primarily heated by an electric furnace, gas furnace, or ducted heat pump if located in Oregon. Residence must be primarily heated by a gas furnace if located in Washington. Thermostat must be connected to the internet through a Wi-Fi network and configured with the home’s location. Visit [www.energytrust.org/thermostat](http://www.energytrust.org/thermostat) for eligible models. Cannot be combined with other Energy Trust controls incentives or smart thermostat offers. | **$100** |
| **Thermostat** | Manufacturer:       | Installed Cost $       |
| Model Name:       | Model #:       |

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| **Insulation Self-Install Checklists** |
| **Self-installed insulation is selected randomly for work quality verification before incentives are paid. Energy Trust will contact customers for scheduling. These checklists serve as reference guides only. Please refer to the Specifications Manual at** [**www.energytrust.org/manual**](https://energytrust.org/wp-content/uploads/2022/07/2022-Specifications-Manual_WEB.pdf) **for additional information and clarification. Specific reference sections are noted in italics.** |

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| **Attic Insulation Self-Install Checklist** |
| [ ]  | Determine if storage or human contact areas are present. *IN 1.9* |
| [ ]  | Install baffles at eave vents, heat-producing fixtures, flues and chimneys. *AT 1.3 and 1.5* |
| [ ]  | Dams shall be installed at interior accesses and where insulation is at different levels to prevent loose-fill falling out of attic. *AT 1.4 and 1.10* |
| [ ]  | Interior ceiling accesses shall be insulated to a minimum of R-30 and knee wall access doors shall be insulated to a minimum of R-15. Interior accesses shall have permanent weatherstripping. *AT 1.10 and 2.6* |
|
| [ ]  | Verify all exhaust fans are vented completely to the exterior with no gaps. *AT 1.6, 1.7 and 1.8*  |
| [ ]  | Insulate water lines in attic space. *AT 1.9* |
| [ ]  | Insulate and weatherstrip access panel or pull-down stairs. *AT 1.10, 1.11, 1.12* |
| [ ]  | Insulate vertical walls and cover with air barrier, install blocking in floor under knee wall. *AT 1.13* |
| [ ]  | Verify R-value and condition of installed insulation. *Appendix B* |
| [ ]  | All vapor barriers are facing the living area. *AT 2.0* |
| [ ]  | Vertical walls separating attics from indoors hsall be insulated. *AT 1.13 and AT 2.6* |

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| **Floor Insulation Self-Install Checklist** |
| [ ]  | Determine the intended conditioned spaces and location of air and thermal boundaries. *UN 1.0* |
| [ ]  | Remove debris from the crawlspace. *UN 1.1* |
| [ ]  | Determine if storage or human contact areas are present. *IN 1.9* |
| [ ]  | Verify adequate passive ventilation. *UN 1.2* |
| [ ]  | Seal all floor penetrations (plumbing, wiring, duct penetrations and floor transitions). *UN 1.4* |
| [ ]  | Ensure ground cover is complete, continuous and properly lapped. *UN 1.3* |
| [ ]  | Insulation being installed is an appropriate R-Value and is properly supported using approved materials and fasteners. Supports are spaced according to the span. *UN 2.0–2.2 and Appendix B* |
|
| [ ]  | Entire length of insulation is in contact with the floor. *UN 2.0* |
| [ ]  | All vapor barriers are facing the living area. *UN 2.0* |
| [ ]  | Insulate water lines. *UN 2.3* |
| [ ]  | Access doors are insulation to R-25 and weatherstripped. *UN 2.4* |
| [ ]  | Verify access doors open easily and are weatherproof and vermin proof. *UN 2.5* |
| [ ]  | Crawlspace walls between living area and crawlspace areas insulated to R-15. *UN 2.8* |
| [ ]  | Exhaust ducts vent completely to the outside with no gaps. *UN 2.5 and 2.6* |
| [ ]  | Vertical walls separating crawlspaces from indoors are insulated. *UN 2.8* |

**Terms and Conditions**

**APPLICATION:** This application must be filled out completely, truthfully and accurately. Customer may wish to retain a copy of this application and any accompanying documentation submitted to Energy Trust of Oregon, Inc. (“Energy Trust”) under this program. Energy Trust will not be responsible for lost documentation pertaining to this application request. **Energy Trust must receive applications within 60 days after the date of installation**.

**ELIGIBILITY:** Incentives are available to eligible Customers who are: (i) Oregon residential electric service customers of Portland General Electric (PGE) or Pacific Power, (ii) Oregon residential natural gas service customers of NW Natural, Cascade Natural Gas or Avista, or (iii) Washington residential natural gas service customers of NW Natural. Incentives for energy-saving upgrades 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 and Avista customers who heat their homes with natural gas. Final determination of eligibility shall rest solely with Energy Trust.

**ELIGIBLE PRODUCTS:** Products must meet Energy Trust energy efficiency specifications. These specifications may be found at [www.energytrust.org](http://www.energytrust.org) and are subject to change. If you are not sure of the specifications, please call Energy Trust before proceeding.

**WORK QUALITY VERIFICATION:** Customer will verify that the installed energy-saving upgrades meet program requirements and Energy Trust  specification standards. 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:** Subject to funding availability, Energy Trust will promptly pay incentives upon: (i) completion of the energy-saving upgrades, (ii) verification of the upgrades, and (iii) submission of this completed application with all required information attached. **Please allow 4‑6 weeks for incentive processing.** Failure to deliver all required information may result in a delay or withholding of payment.

**PROOF OF PURCHASE:** The receipts accompanying this application must itemize the materials purchased and show the date of purchase. If Customer is leveraging external funding sources to directly reduce all or a portion of the final project costs (e.g., state/federal funding, grants, discounts, rebates, incentives or other similar types of consideration), Customer is required to notify Energy Trust in writing when submitting the proof of purchase and Energy Trust’s incentive will not exceed an amount equal to the total eligible project cost minus such external funds.

**INCENTIVE AMOUNT:** Incentive amount cannot exceed total cost of materials. Incentives for energy-saving upgrades completed and/or installed as set forth in documentation accompanying this application are limited to the amounts provided by Energy Trust. Incentive offers are subject to funding availability and may change. **Incentive amounts are valid for installations done through December 31, 2025.**  Incentives will be released after the work passes work quality verification. Energy Trust will not pay incentives on products won as a prize or received due to a warranty claim, recall or exchange. Products must be owned and not leased or rented. Current incentive amounts are identified at [www.energytrust.org](http://www.energytrust.org/). Contact Energy Trust with any questions.

**TAX LIABILITY:** Energy Trust is not responsible for any tax liability that 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: (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. 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 upgrades on the property on which those upgrades are completed and/or installed and that any necessary consent has been obtained.

**ACCESS AND EVALUATION:** Energy Trust and/or its representatives may request access to the property on which energy upgrades 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, and obtain all necessary consent, for the purposes described herein.

**DISCLAIMER/NO LIABILITY:** **Customer understands that, although 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. Customer assumes the risk of any loss or damage(s) that Customer may suffer in connection with upgrades. Energy Trust does not guarantee any particular energy savings 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, including without limitation interval data, relating to the property on which energy upgrades have been completed and/or installed by accessing the electric account, natural gas account, and thermostat usage information at the physical address of the project. Customer agrees to provide 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 Public Utility Commission, Oregon Department of Energy, Oregon Housing & Community Services, the Oregon Legislature, and/or other government agencies. Energy Trust will treat all other information gathered as confidential and report it only in the aggregate, unless a specific disclosure is required by applicable law or governmental or court order.

**Optional Customer Demographic Information (If completed, choose all that apply)**

**Why is Energy Trust asking for this information?**

Energy Trust is asking customers to submit demographic information because it is our responsibility to ensure that all customers can directly benefit from our services. We believe demographic data collection is a simple yet powerful tool for pursuing equity and inclusion in our work and programs. Receiving the information below about our customers will give us a clearer picture of program participation rates within our Residential Programs. We will use that information to assess our offers and identify barriers to participation, enabling us to develop and improve offers to reduce or eliminate those barriers. Questions about household income and full-time residents can help identify if you and your household may be eligible for increased Energy Trust incentives

Providing this information is optional, does not impact your participation in the program, and will be held confidential by Energy Trust.

|  |  |
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| **Which of the following racial and ethnic backgrounds best describe you?** *(choose all that apply)*[ ]  Asian or Asian American[ ]  Black or African American[ ]  Hispanic or Latino/a/x[ ]  Middle Eastern or North African[ ]  Native American or Alaskan Native[ ]  Native Hawaiian or other Pacific Islander[ ]  White[ ]  Prefer not to answer[ ]  Prefer to self-describe:      | **What is the primary language(s) used in your household? (select all that apply)**[ ]  Arabic [ ]  Marshallese[ ]  Cantonese [ ]  Russian[ ]  English [ ]  Spanish[ ]  French [ ]  Tagalog[ ]  German [ ]  Thai[ ]  Japanese [ ]  Ukrainian[ ]  Korean [ ]  Vietnamese[ ]  Mandarin [ ]  Prefer not to answer[ ]  Another language:       |

**Income**

Using the chart below, select one of the following options. My household income is:

[ ] [ ]  **Above the Middle Threshold income level** as indicated in the Income Chart below.

[ ]  **Between the Lower and Middle Threshold income levels** as indicated in the Income Chart below.

[ ]  **Below the Lower Threshold income level** for my household size as indicated in the Income Chart below. I understand that because of my income level, I am eligible to receive weatherization services and/or other energy upgrades from Oregon Housing and Community Services (OHCS) that may be available to me for free, but I still choose to participate in this program.

|  |  |  |
| --- | --- | --- |
| **Household Size** | **Lower Threshold** | **Middle Threshold** |
| 1 | $30,120 | $66,854 |
| 2 | $40,880 | $87,424 |
| 3 | $51,640 | $107,994 |
| 4 | $62,400 | $128,564 |
| 5 | $73,160 | $149,134 |
| 6 | $83,920 | $169,704 |
| 7 | $94,680 | $173,562 |
| 8 | $105,440 | $177,418 |