

# Functional Testing

## New Buildings | Incentive Application | 520<sub>CX-FT</sub>



### OVERVIEW AND ELIGIBILITY

A signed copy of the **Project Enrollment Application (Form 510A)** must accompany or precede this form, and only those projects approved for enrollment by the New Buildings program (Program) can apply for incentive funding.

Once building systems are installed and accessible, functional testing can be performed to help the project owner verify whether components, units and systems are operating per design specifications. Functional testing is important, because it can uncover many energy-related issues such as stuck dampers, sensor malfunctions and controls problems.

To be eligible for Energy Trust functional testing incentives, the functional testing must meet the standards outlined in ASHRAE Guideline 0-2013 and be completed by a Commissioning Authority (CxA) that is either an independent third-party or from the same company as the design firm but unaffiliated with the building project. In addition, the CxA shall:

- Be a professional engineer registered in Oregon, **or**
- Provide documentation showing they were the CxA on at least two previous projects

### PROJECT INFORMATION

PROJECT OWNER NAME	COMPANY
BUILDING/PROJECT NAME	PROJECT ID (IF KNOWN)
SITE ADDRESS	CITY, STATE, ZIP
EXPECTED CONSTRUCTION COMPLETION DATE	EXPECTED COMPLETION DATE OF FUNCTIONAL TESTING

### Commissioning Authority (CxA)

CONTACT NAME	TITLE	PHONE	EMAIL
FIRM NAME	ADDRESS	CITY, STATE, ZIP	

### STEPS TO PARTICIPATE

1. Successfully enroll your project as described in the **Project Enrollment Application**.
2. Complete this **Incentive Application** and submit it to the Program.
3. Following its review of the application, Energy Trust will notify Project Owner via e-mail of its decision. If the application is approved for an incentive reservation, you will receive a written notice. The incentive reservation notice will inform Project Owner of the estimated incentive and incentive reservation period (i.e. the deadline to submit all required documentation to the Program).
4. Perform functional testing on all major energy systems (at a minimum this must include HVAC systems and controls, lighting and daylighting controls, domestic hot water systems, and renewable energy systems)
5. Submit the full Cx Report and an Executive Summary that includes:
  - Description of systems receiving functional testing
  - Description of functional testing work performed
  - Findings of functional testing

**RETURN FORM TO**  
Business Energy Solutions – New Buildings  
100 SW Main Street, #1500, Portland, OR 97204  
1.877.467.0930 **telephone** 503.961.7642 **fax**  
[newbuildings@energytrust.org](mailto:newbuildings@energytrust.org) **email**

For Program Use Only  
OM:  
Project ID:  
PT ID:

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- Description of repairs or resolutions for any issues found during functional testing
  - Clear indication that all issues impacting building energy performance are resolved
6. To request payment, submit the following to the Program, before the established incentive reservation deadline, for verification:
- Complete, signed **Payment Request (Form 540PR)**
  - Project Owner's current W-9 (if not previously submitted)
  - Qualifications of CxA performing the design review (Form 540PE if CxA is an Oregon registered PE)

### INCENTIVE CALCULATION

- If the project site has eligible electric and natural gas (on a qualifying rate schedule) utility service, or if the project site is an electric-only site (i.e. all site energy provided solely by a participating electric utility, no other site fuel source) eligible for Energy Trust electric incentives, an incentive of \$0.15 per square foot up to \$40,000 is available to qualifying projects that perform functional testing on all major energy-using systems. Major energy-using systems at a minimum include: space heating, space cooling, air distribution, hot water, and lighting. Additional systems may be considered major energy using systems for certain building types (e.g. refrigeration system in a grocery store).
- If the project site is not electric-only and is eligible for Energy Trust electric incentives only, the maximum functional testing incentive available will be \$0.12 per square foot up to \$32,000.
- If the project site is on a qualifying rate schedule eligible for Energy Trust natural gas incentives only, the maximum functional testing incentive available will be \$0.03 per square foot up to \$8,000.

### SUBMITTAL

By typing or printing my name below, I represent to Energy Trust that (i) I have completed this application completely, truthfully and accurately to the best of my knowledge, (ii) I have read, understand and agree that the terms and conditions contained in this **Incentive Application** are in addition to, and governed by, Project Owner's **Project Enrollment Application** agreement with Energy Trust for the identified project; (iii) I am authorized to enter into this agreement on behalf of the named Project Owner; and (iv) all of the information in the submitted **Project Enrollment Application** agreement remains true and correct as of the date of this submission.

**Submitted By:** (Must be an authorized representative of Project Owner)

Signature	Title	Date
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Firm Name	Phone	Email
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### FOR MORE INFORMATION

Please visit [energytrust.org/business](http://energytrust.org/business) or call 1.877.467.0930

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