

Water Heating Incentives

Existing Multifamily | Incentive Application | Form 320_{WH}



To be completed by Participant

TRC is a Program Management Contractor for Energy Trust of Oregon.

Who can apply:

Incentives are available for new, qualifying natural gas and electric energy-saving equipment installed at an existing multifamily property in Oregon. Electric customers of Portland General Electric or Pacific Power can apply for incentives for qualifying electric equipment, and natural gas customers on eligible rate schedules of NW Natural, Cascade Natural Gas or Avista can apply for incentives for qualifying natural gas equipment. Additional requirements apply; see Terms and Conditions for details.

Steps to completion:

- 1 Install** a qualifying energy efficiency improvement.
- 2 Complete** application information and provide required supporting documentation, including:
 - W-9 for payee, if applicable
 - Invoice(s) for product and installation
 - Manufacturer spec sheet(s)
- 3 Submit** form by fax, email or mail along with supporting documentation to:
**Energy Trust of Oregon
Existing Multifamily**
111 SW Columbia St., Suite 945
Portland, OR 97201
1.877.510.2130 phone
503.243.1154 fax
multifamily@energytrust.org
- 4 Receive** your check.
Please allow six to eight weeks for incentive processing after completed application is received.

What you need-to-know:

- Energy Trust must receive applications within 90 days from equipment purchase and install.
- Incomplete information will result in delayed payment or disqualification of the incentive.
- A post-installation verification may be required to receive payment.
- Use **Forms 320HVAC, 320APP, or 320WX** for other Existing Multifamily upgrades.

Energy Trust Use Only	Project ID	PT ID	Promo Code (Optional)
Incentive limits apply; see Terms and Conditions			
Property Owner <input type="checkbox"/> Check this box if you want the Property Owner named below to receive the incentive check			
Legal Name of Property Owner (the "Participant")			
Contact Name		Title	
Mailing Address			
City		State	Zip
Phone <input type="checkbox"/> Work <input type="checkbox"/> Cell		Email	
Property Ownership <input type="checkbox"/> Investment Owner <input type="checkbox"/> Individual Unit Owner		Occupied by <input type="checkbox"/> Owner <input type="checkbox"/> Tenant	
Is this property used for rental income? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If you checked Yes, a W-9 is required for payment.</i>			
Property Representative (Skip section if you are an individual unit owner)			
Company Name			
Contact Name		Title	
Mailing Address			
City		State	Zip
Phone <input type="checkbox"/> Work <input type="checkbox"/> Cell		Email	
Property Information			
Property Name			
Address			
City		State	Zip
Number of Buildings		Number of Units	Number of Bldg Levels
Year Built		Total Sq. Ft. of Buildings or Unit	
Market <input type="checkbox"/> Affordable Housing <input type="checkbox"/> Campus Living <input type="checkbox"/> Asst. Living/Retirement <input type="checkbox"/> Market Rate <input type="checkbox"/> HOA <input type="checkbox"/> Individual Unit Owner			
Building Style <input type="checkbox"/> Low-Rise (1-3 stories) <input type="checkbox"/> Duplex <input type="checkbox"/> Townhouse/Rowhouse <input type="checkbox"/> Mid-Rise (4-8 stories) <input type="checkbox"/> Triplex <input type="checkbox"/> Other _____ <input type="checkbox"/> High-Rise (9 or more stories) <input type="checkbox"/> Fourplex			
Electric Utility <input type="checkbox"/> PGE <input type="checkbox"/> Pacific Power <input type="checkbox"/> Other _____		Gas Utility <input type="checkbox"/> NW Natural <input type="checkbox"/> Cascade Natural Gas <input type="checkbox"/> Avista <input type="checkbox"/> None	

Water Heating (check all that apply)

☐ Electric OR ☐ Gas System type: ☐ Central Boiler ☐ Storage Tank ☐ Tankless ☐ Other _____

Space Heating

☐ Electric OR ☐ Gas

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Water Heating Incentives

► All property types

Equipment	Requirements	Equipment Installed	Installed Cost	kBtu/h	Incentive Requested
Commercial Condensing Tank Water Heater <input type="checkbox"/> \$3.50 per kBtu/h	<ul style="list-style-type: none"> Gas-condensing, storage-type water heater with integral tank volume at least 10 gallons Must have minimum 94% Thermal Efficiency (TE) or recovery efficiency Water heater input capacity must be greater than 75 kBtu/h per water heater Additional storage-only tanks may be present Property must have a shared central domestic hot water system Property must have water heating fuel provided by a participating gas utility Projects where existing water heater is functional, and not at the end of its useful life, do not qualify 	Efficiency Rating	\$		\$
		Model:			
		Manufacturer:			
		Tank Size:			
Commercial Condensing Tankless Water Heater/ Boiler at least 200 kBtu/h input <input type="checkbox"/> \$1.40 per kBtu/h	<ul style="list-style-type: none"> Gas-condensing domestic hot water (DHW) must serve a central water heating system and must not be used for space heating Must have minimum 94% Thermal Efficiency (TE) Water heater input capacity must be at least 200 kBtu/h per water heater Integral tank volume must be less than 10 gallons Approved models must be found here: www.ahridirectory.org Property must have water heating fuel provided by a participating utility 	Efficiency Rating	\$		\$
		Model:			
		Manufacturer:			
		Tank Size:			

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► Stacked structures with five or more units only

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity Installed	Incentive Requested
Domestic Hot Water (DHW) Recirculation Pump Controls <input type="checkbox"/> \$180 per system 1/4 horsepower (hp) and below <input type="checkbox"/> \$300 per system More than 1/4 hp up to 1.25 hp <input type="checkbox"/> \$600 per system More than 1.25 hp up to 2.5 hp <input type="checkbox"/> \$1,400 per system More than 2.5 hp up to 5 hp	<ul style="list-style-type: none"> Pump control types must be temperature, combined timer and temperature or learning controls DHW recirculation system must meet applicable codes and regulations Property must have domestic central water heating Retrofitted controls or integral controls qualify Property must have water heating fuel provided by a participating utility 	Control Type: <input type="checkbox"/> Temperature <input type="checkbox"/> Learning <input type="checkbox"/> Combined Timer and Temperature	\$		\$

► Stacked structures with five or more units only

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity Installed	Incentive Requested
Condensing Tankless Water Heater under 200 kBtu/h input – Gas <input type="checkbox"/> \$140 per unit	<ul style="list-style-type: none"> Gas-condensing domestic hot water (DHW) must not be used for space heating and must serve stacked structures with central water heating Water heater Uniform Energy Factor (UEF) must be at least 0.94 Water heater input capacity must be less than 200 kBtu/h per water heater Additional hot water storage tanks cannot be added Approved models must be found here: www.ahridirectory.org 	Efficiency Rating Manufacturer: Tank Size or kBtu/h Model: # of dwelling units served by new system	\$		\$
Did the previous water heating system use a storage tank? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, will the storage tank continue to be used? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A					

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► Side-by-side or duplex, triplex, fourplex properties only

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity Installed	Incentive Requested
Residential Gas Tankless Water Heater – under 200 kBtu/hr input* <input type="checkbox"/> \$400 per unit	<ul style="list-style-type: none"> Water heater must be ENERGY STAR® qualified at the time of purchase. Please visit energytrust.org/tanklesswaterheaters for a list of qualifying models Water heater must replace storage tank water heater Dwelling unit must have an existing dedicated 1/2" gas line capable of serving the tankless water heater OR an existing 3/4" gas line that can serve the existing appliances, in addition to the tankless water heater Hybrid water heaters do not qualify Property must have water primarily heated by a participating utility. Properties without an existing gas line only qualify if a new gas line installed at no cost by a utility. 	UEF Manufacturer: Model:	\$		\$
Was the unit's gas line upgraded to accommodate the installation of the tankless water heater? <input type="checkbox"/> Yes <input type="checkbox"/> No What was the size of the unit's original gas line? <input type="checkbox"/> 1/2" <input type="checkbox"/> 3/4" <input type="checkbox"/> Other What is the unit replacing? <input type="checkbox"/> Gas Storage Tank <input type="checkbox"/> Electric Storage Tank <input type="checkbox"/> Other					

* For Oregon single-family and manufactured homes, please apply using forms found at energytrust.org/forms.

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To be completed by Participant

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Pool Incentives

► All property types

Equipment	Requirements	Equipment Installed	Installed Cost	Pool Sq. Ft.	Incentive Requested
Commercial Swimming Pool Heater Non-Condensing Heater, Covered <input type="checkbox"/> \$0.90 per sq. ft. of pool surface area Non-Condensing Heater, Not covered <input type="checkbox"/> \$1.00 per sq. ft. of pool surface area Condensing Heater, Covered <input type="checkbox"/> \$3.00 per sq. ft. of pool surface area Condensing Heater, Not covered <input type="checkbox"/> \$5.00 per sq. ft. of pool surface area	<ul style="list-style-type: none"> Must have 400 kBtu/h capacity or less per heater, not to exceed a total of 1,000 kBtu/h for all heaters combined Must be at least 94% thermal efficiency for condensing heaters, must be at least 84% efficiency for non-condensing heaters Must be a replacement, gas-fired pool heater. Heater must not have a continuously burning pilot light Property must receive gas from a participating utility Covered and not covered pools both qualify. Qualifying pool covers include solid track, bubble type, or foam type with storage reels Pool must meet minimum area requirements below: 	Manufacturer: Efficiency Rating: Model: kBtu/h: Pool location: <input type="checkbox"/> Indoor <input type="checkbox"/> Outdoor Pool cover: <input type="checkbox"/> Existing cover <input type="checkbox"/> Not covered Number of heaters serving pool:	\$		\$

Covered Pool	Heater Type	Pool Location	Minimum Required Pool Sq. Ft.
No	Condensing	Indoor	1,275
		Outdoor	700
Yes	Condensing	Indoor	2,150
		Outdoor	1,050
No	Non-Condensing	Either	500
Yes	Non-Condensing	Indoor	850
		Outdoor	500

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Pool Incentives Continued

Equipment	Requirements	Equipment Installed	Installed Cost	Pool Sq. Ft.	Incentive Requested
Commercial Pool Cover <input type="checkbox"/> \$6.00 per sq. ft. of pool surface area	<ul style="list-style-type: none"> Pool must be heated. Pool must not have had a pre-existing cover within six months of pool cover installation Covers installed at residential pools do not qualify Cover must be specifically designed for swimming pools, cover the entire pool surface area, and utilize a storage reel Liquid evaporation suppressants, solar disks, and mesh covers do not qualify Pool heating fuel must be provided by a participating utility 	Manufacturer: Model: Pool location: <input type="checkbox"/> Indoor <input type="checkbox"/> Outdoor Pool Heating Fuel: <input type="checkbox"/> Gas <input type="checkbox"/> Electric Pool Heater Type: <input type="checkbox"/> Non-condensing Gas Heater <input type="checkbox"/> Condensing Gas Heater <input type="checkbox"/> Heat Pump Heater <input type="checkbox"/> Electric Resistance Heater	\$		\$


REMEMBER TO:

- ▶ Complete and sign this application.
- ▶ Attach invoices and all other required project cost documentation for all equipment purchased.
- ▶ Attach a completed IRS Form W-9 or Energy Trust Substitute W-9 form if applicable.
- ▶ Use the **Form 320A: Assign Payment** to authorize payment of the incentive to your contractor or other designated Payee. To assign payment, both Participant and Payee must complete and sign a **Form 320A** and it must be submitted along with this incentive application.

Participant Signature – if you are assigning your incentive, also complete **Form 320A**.

Please sign below either manually (ex. handwritten) or electronically (ex. typing your name, drawing your signature on a touchpad or touchscreen, inserting a digital signature, or, if available, by clicking the box).

Signature: By signing below, I represent that (i) I am authorized to enter into this agreement and have read, understand and agree to its **Terms and Conditions** on behalf of the named Participant, (ii) I have completed this application truthfully and accurately to the best of my knowledge, and (iii) the energy efficiency equipment installations have been completed to my satisfaction and all accompanying invoice(s) and other supporting documentation are accurate and complete.

Signature 	Name (printed)	Date
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FOR MORE INFORMATION: Call 1.877.510.2130, and ask for the Multifamily program.

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Terms and Conditions

- 1. Application.** Energy Trust must receive this application with all required accompanying documentation within 90 days of equipment purchase and installation in order to qualify for incentives. Certain limited time offers may require submittal by specific deadlines to qualify for bonus incentives. All required information must be submitted before this application will be processed. By submitting this application, Participant represents that (i) none of the equipment requesting incentives has already received an Energy Trust incentive or rebate at the time of purchase, and (ii) none of the equipment requesting incentives will be submitted to the Oregon Department of Energy for self-direct credits. Please retain a copy of this application and any accompanying documentation submitted. Energy Trust's Program Management Contractor (PMC) provides Existing Multifamily program (Program) services on behalf of Energy Trust. Neither Energy Trust nor the PMC will be responsible for any lost documentation pertaining to this application, or any lost or misdirected mail.
- 2. Eligibility.** Incentives are available for new, qualifying natural gas and electric energy-saving equipment installed at an existing multifamily property in Oregon. Electric customers of Portland General Electric or Pacific Power can apply for incentives for qualifying electric equipment, and natural gas customers on eligible rate schedules of NW Natural, Cascade Natural Gas or Avista can apply for incentives for qualifying natural gas equipment. If Participant may apply for Multifamily Energy Program funding from Oregon Housing and Community Services (OHCS) for any equipment listed, Participant must contact the Program to discuss eligibility before submitting this application. If eligible for OHCS Multifamily Energy Program funding, then Participant agrees Energy Trust can share information about Participant's incentive application with OHCS for the purpose of determining potential incentive eligibility and funding amounts. Additional eligibility restrictions may apply. Final determination of eligibility for Energy Trust incentives rests solely with Energy Trust.
- 3. Eligible Equipment.** Equipment must be new and must meet Energy Trust energy efficiency specifications to qualify. The specifications and incentive amounts listed in this application, including any bonus amounts, are subject to change. Visit energytrust.org/multifamilyincentives to confirm current Program specifications and incentives. If you, or your contractor are not sure of the specifications, please call us before proceeding.
- 4. Equipment Installation.** Participant represents that (i) it has the right to install the energy saving equipment on the property and site(s) on which the equipment is installed and that any necessary consents have been obtained, and (ii) that all equipment installed and work performed complies with all applicable laws, regulations, and safety, building, environmental, and permitting codes, and any manufacturer instructions.
- 5. Project Cost Documentation.** Participant must submit all sales slips, invoices, manufacturer specification sheets and other pertinent documents itemizing the equipment purchased. The project cost documentation submitted must show (i) the date of purchase and itemized price paid, (ii) size, type, make, and model or part number of equipment purchased, and (iii) a description of any installation or other labor charges. In addition to the required proof of purchase documentation, the Program may require additional site or technical information from Participant, for certain equipment, in order to determine whether it qualifies for incentives. Participant will provide Energy Trust with additional proof of purchase or other requested equipment information upon request. If Participant is leveraging external funding sources to directly reduce all or a portion of the final project costs incurred by Participant for the energy-efficiency equipment (for example, state/federal funding, grants, discounts, rebates, incentives or other similar types of consideration) then Participant is required to notify Energy Trust in writing when submitting the project documentation and Energy Trust's incentive will not exceed an amount equal to the total eligible project cost minus such external funds.
- 6. Payment.** Subject to funding availability, incentives will be paid following (i) installation of qualifying energy efficient equipment at the site address(es) listed, in accordance with Program requirements, (ii) Energy Trust's receipt of this completed application, a complete, accurate, and verifiable **IRS Form W-9 (Request for Taxpayer Identification Number and Certification)** for the incentive check recipient and all required accompanying project cost documentation, and (iii) satisfactory completion of a post-installation verification, if required. Incentives will be paid directly to the named Participant (at the mailing address shown above) unless Participant and its designated Payee sign and submit the **Form 320A: Assign Payment** along with this incentive application. Please allow 60 days from Energy Trust's receipt of all information for delivery of incentive payment. Failure to deliver all required documentation may result in a delay or withholding of payment.
- 7. Incentives.** Funds for incentives are limited and subject to budget availability. Program requirements, including incentive levels and limits, are subject to change without advance notice and may vary by utility service area depending on the pace of demand in each service area and the available incentive budget. The total incentive provided will depend upon the incentives in effect as of equipment purchase date. If any bonus amounts are available for qualifying equipment, the base incentive plus the bonus incentives will never exceed the total documented eligible measure cost. Energy Trust incentives will never exceed the documented total final eligible project costs or Energy Trust's maximum allowable per-project incentive amount. The Program also limits the total amount of incentives that any Participant can receive on a per- site, per-year basis. Determination of site eligibility for application and incentive purposes shall rest solely with Energy Trust.
- 8. Verification.** Equipment installations may be selected for a post-installation verification. Should Participant's property be chosen for a post-installation verification of the equipment, satisfactory completion of that verification has to occur before payment is issued. This verification is for the purpose of incentive payment only. No warranty is implied.

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9. Tax Liability. Energy Trust is not responsible for any tax liability which may be imposed on the Participant as a result of any incentive payment. 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.

10. No Endorsement. Energy Trust does not endorse any particular manufacturer, contractor or product in promoting the Program. The fact that the names of particular manufacturers, contractors, products or systems may appear in the Program does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.

11. Access and Evaluation. Reviews and evaluations of project work during and after measure installation are a critical part of Energy Trust's evaluation process for energy savings and incentive calculations. Participant agrees to cooperate with any such evaluation as a requirement of its incentive agreement with Energy Trust. Participant agrees to provide Energy Trust and its representatives with (i) reasonable access to the project site(s), obtaining any and all necessary consents, (ii) requested technical and other project documentation related to the installed equipment, and (iii) information about the energy use and operations of the equipment and/or project site(s) for the purposes of evaluating the energy savings during and after project completion. Participant agrees that Energy Trust and its representatives may inform subsequent owners of the project site(s) that Energy Trust has provided services to the project site(s) for the sole purpose of evaluating and facilitating Energy Trust program services.

12. Disclaimer/No Liability. In connection with some applications, Energy Trust will provide incentive funding for energy-saving equipment. Participant understands that, while Energy Trust may provide this funding, neither Energy Trust nor the PMC are supervising any work performed for Participant, and neither Energy Trust nor the PMC are responsible in any way for proper completion of that work or proper performance of any equipment purchased. Participant assumes the risk of any loss or damage(s) that Participant may suffer in connection with the equipment. Energy Trust does not guarantee any particular energy savings results by its approval of this application, or by any other of its actions.

13. Energy Information Release. By signing and submitting this incentive application to Energy Trust, Participant authorizes Energy Trust to access its energy usage data, including without limitation interval data, for all of Participant's electric and gas utility accounts at the physical address(es) of the project as listed. Participant agrees to provide other reasonable assistance to Energy Trust to obtain such information. Participant further authorizes Energy Trust to discuss its energy efficiency efforts with its utility account representative(s).

14. Information Release. Participant agrees that Energy Trust may include some or all of the following information in reports to the legislature, Oregon Public Utility Commission (OPUC), funding utilities, and other government agencies as necessary to meet Energy Trust responsibilities and regulatory requirements: Participant's name, site address, general description of the type of energy saving or renewable project implemented (e.g. lighting, HVAC, solar PV), Energy Trust services or incentive payments provided to the Participant, and any energy saved or generated as a result of Energy Trust services or incentives. Energy Trust will treat all other information gathered as confidential and report it to such agencies only in the aggregate, unless a specific disclosure is required by applicable law or governmental or court order.

15. Governing Law. This agreement shall be exclusively governed by and construed in accordance with applicable Oregon law, without regard to any conflicts of laws rules thereof.