

# Oregon Residential, Central Air Conditioning Install

Residential and Existing Multifamily | Incentive Application | Form 320CAC



## Steps to completion:

- 1 Make** an energy saving improvement in an existing home.
- 2 Complete** application information, including:
  - Contractor **and** customer signatures
  - Invoices billing the customer for purchase and installation marked "Paid in full"
  - Supporting documentation (*if applicable*)
- 3 Submit** form by mail, fax or email (with documentation) to:
 

**Energy Trust of Oregon Residential**  
 818 SW 3<sup>rd</sup> Ave, #215  
 Portland, OR 97204  
 1.866.311.1822 phone  
 1.866.516.7592 fax  
[residentialforms@energytrust.org](mailto:residentialforms@energytrust.org)
- 4 Receive** your check. Please allow four to six 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

Promo Code (optional)

This home is  Owner-occupied  A rental property I own\*

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

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  
\*Home must be serviced by PGE or Pacific Power to qualify

Gas utility:  NW Natural  Cascade Natural Gas  Avista  Other \_\_\_\_\_

## Site Information

Year built	Square feet (conditioned space)	Number of levels
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"/> Slab on grade
	<input type="checkbox"/> Crawlspace w/ vapor barrier	<input type="checkbox"/> Half basement
	<input type="checkbox"/> Garage/basement combo	<input type="checkbox"/> Other _____
Property type:	<input type="checkbox"/> Single-family home	<input type="checkbox"/> Duplex
	<input type="checkbox"/> Manufactured home	<input type="checkbox"/> Triplex
	<input type="checkbox"/> Townhouse/Rowhouse	<input type="checkbox"/> Fourplex

## 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 the Home Retrofit [Specifications Manual](#) and [program incentive guides](#) found on Energy Trust's website.



Contractor signature \_\_\_\_\_ Full name (please print) \_\_\_\_\_ Date \_\_\_\_\_

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## Site Heating System Information

Primary heating system <i>(check one)</i>	<input type="checkbox"/> Electric furnace	<input type="checkbox"/> Gas furnace	<input type="checkbox"/> Wood
	<input type="checkbox"/> Propane		<input type="checkbox"/> Other:

## Cooling Incentive

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Qualifying Central Air Conditioner	System must be a qualifying central air conditioner serving most or all of the home. Homes primarily heated with a heat pump do not qualify.	<b>\$250</b>
Central Air Conditioner Installed Cost: \$	New heating system installed cost (if applicable): \$	System Capacity (Tons):
Outdoor Manufacturer:	Outdoor Model:	
Indoor Coil Manufacturer:	Indoor Coil Model:	
Furnace/Blower Manufacturer (if applicable):	Furnace/Blower Model # (if applicable):	
<b>Outdoor Unit SEER</b>	<i>To qualify for this incentive, the air conditioner outdoor unit is required to achieve a minimum nominal rating of 15 SEER as stated by manufacturer. For list of known qualifying units, please contact Energy Trust at <a href="mailto:residential@energytrust.org">residential@energytrust.org</a></i>	
	Outdoor unit SEER per manufacturer (minimum 15):	Did this central air conditioner replace an existing central air conditioner? <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Outdoor Unit and Coil EER</b>	<i>To qualify for this incentive, the system's outdoor unit and indoor coil are required to achieve a minimum rating of 12 EER per AHRI rating.</i>	
	Outdoor unit and indoor coil EER (per AHRI):	
I have attached an AHRI certificate*: <input type="checkbox"/> Yes <input type="checkbox"/> No - list certificate number:		
*Energy Trust requires the system adheres to AHRI configurations. If certificate indicates Thermostatic Expansion Valve (TXV) and/or Time Delay Relay (TDR) as necessary to achieve certified efficiency rating, the system will be quality checked under these guidelines.		

## Controls Incentive

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Smart thermostat	Home must be primarily heated by an electric furnace or gas furnace. Thermostat must be connected to the internet through a Wi-Fi network and configured with the home's location. Visit <a href="http://www.energytrust.org/thermostat">http://www.energytrust.org/thermostat</a> for eligible models.	<b>\$50</b>
<b>Thermostat</b>	Manufacturer:	Model Name:
	Model #:	Serial #:

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## Terms and Conditions

**APPLICATION:** This application and any required additional documentation must be filled out completely and accurately. Customers may wish to retain a copy of this application and any accompanying documentation submitted to Energy Trust. 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 for installations done through December 31, 2019. Please allow 4-6 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 (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 or cooling are available to PGE and Pacific Power customers who heat or cool their homes with electricity and to NW Natural, Cascade Natural Gas and Avista customers who heat or cool 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 water with electricity and to NW Natural, Cascade Natural Gas and Avista customers who heat water 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 on the web at <http://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, 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. The invoice must show a description of any installation or other labor charges and that 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](http://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, 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. 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. Customer also authorizes the contractor identified on this application form to share information about the Customer's thermostat system, including, without limitation, thermostat usage information, with Energy Trust.

**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 and Community Services and/or the Oregon Legislature. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate.