

Residential Heating and Cooling Incentives, Contractor Install

Residential | Incentive Application | Form 320_{C-HVAC}



Want your incentive faster?



Apply online.

Visit www.energytrust.org/now

Steps to completion:

- 1 Make** an energy saving improvement in a qualifying residence.
- 2 Complete** application information, including:
 - Contractor **and** customer signatures
 - Invoices billing the customer for purchase and installation marked "Paid in full"
 - For Energy Trust trade allies submitting this as an instant incentive project:
 - Invoice billing the customer must show incentive deductions
- 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 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, and the owner or manager is receiving the incentive directly, a complete, accurate, and verifiable W-9 is required. Visit 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 _____

Utility Information

Electric utility: PGE Pacific Power Other _____

Gas utility: NW Natural Cascade Natural Gas Avista Other _____

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 Garage/basement combo Half basement Full basement Crawlspace w/ vapor barrier Crawlspace Slab on grade

Home type (Oregon): Single-family Manufactured Home type (Washington): Single-family Manufactured Rowhouse Townhouse Duplex Triplex Fourplex

Are you an Energy Trust trade ally submitting this as an Instant Incentive project? Yes, instant incentive amount listed on invoice: \$ _____

Customer Name and Signature

By signing below, Customer agrees to the terms and conditions of this application and authorizes Contractor identified below to submit this application and all required invoices and documentation to Energy Trust on Customer's behalf. By that authorization, Customer represents to Energy Trust that all measures have been completed satisfactorily by Contractor as of the signature date below and all accompanying documentation is 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. If identified as an Energy Trust instant incentive project, Customer understands and agrees that Energy Trust will issue incentive check for incentives that meet Energy Trust requirements to the Contractor and Customer is responsible for paying the remaining balance of the invoice.

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 all accompanying documentation is complete and accurate, and all improvements associated with this incentive request were completed as of the signature date below. Incentives are payable to Customers only unless part of an instant incentive project. If identified as an instant incentive project, Contractor has shown instant incentive amount listed above as itemized discounts from Customer's invoice and agrees to the terms and conditions set forth in Form 372IN: Participation Agreement – Instant Incentives. To receive incentives, all work must comply with the Home Retrofit [Specifications Manual and all other Energy Trust requirements](#).

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

Contractor company _____ **OCCB# or Washington License #** (Non-trade ally only) _____ **Install date** _____

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

Residential Heating and Cooling Incentives, Contractor Install

Residential | Incentive Application | Form 320_{C-HVAC}



Ductless Heat Pump Incentive *One incentive per residence. Residence must be primarily heated by PGE or Pacific Power.*

| Upgrade type | Requirements | Incentive amount |
|--|---|------------------|
| <input type="checkbox"/> Ductless heat pump | Must be inverter-driven with an HSPF of 9.0 or greater and replace electric resistance heat as the residence's primary heating system. Primary indoor unit must be installed in the main living space (e.g., living room, great room). | \$500 |
| <input type="checkbox"/> Ductless heat pump in a single-family rental property | Must be inverter-driven with an HSPF of 9.0 or greater and replace electric resistance heat as the residence's primary heating system. Residence must be a single-family or manufactured home. Primary indoor unit must be installed in the main living space (e.g., living room, great room). Must be offered as an Energy Trust instant incentive by an approved trade ally to qualify. | \$1000 |

Ductless heat pump incentives are available at an increased incentive amount for Oregon residents that qualify for Savings Within Reach. Contact your Energy Trust account manager for more information on how to offer increased incentives.

In what type of room was the primary indoor unit installed? (e.g., living room, great room):

What type of heating system did this replace?

Electric furnace Electric radiant heat Electric wall heat
 Electric baseboard Other:

Is there an alternate, non-electric heating source being used to heat the room? If so, what is it?

Oil heater Propane heater Gas stove
 Wood stove Pellet stove Gas fireplace
 No secondary heating system present Other:

Is an AHRI certificate attached to this application? Yes If no, provide information below: Installed Cost \$

| | | | |
|-----------------------|----------------------|------------------------|-----------|
| Qty of outdoor units: | Qty of indoor units: | Total capacity (BTUs): | HSPF: |
| Outdoor unit*: | Manufacturer: | Model: | Serial #: |
| Indoor unit*: | Model: | | |

* 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 Controls Incentives *Residence must be primarily heated by PGE or Pacific Power.*

| Upgrade type | Requirements | Incentive amount |
|--|--|-------------------|
| <input type="checkbox"/> New heat pump controls | Must be added to a new heat pump with electric furnace auxiliary heat. Heat pump must be home's primary heat source. Visit www.energytrust.org/heatpumpcontrols for eligible models and more information. Thermostat lockout settings must be set to 35°F lockout. Cannot be combined with other heat pump, heat pump controls or smart thermostat 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 www.energytrust.org/heatpumpcontrols for eligible models and more information. Thermostat must be set to 35°F lockout. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. | \$250 |
| Thermostat | Lockout temperature: ° F | Installed Cost \$ |
| | Manufacturer Model Name | Model # |

Residential Heating and Cooling Incentives, Contractor Install

Residential | Incentive Application | Form 320_{C-HVAC}



Ducted Heat Pump Incentives *Residence must be primarily heated by PGE or Pacific Power.*

| Upgrade type | Requirements | Incentive amount |
|---|---|------------------|
| <input type="checkbox"/> Ducted heat pump (installed 1/1/21 – 3/31/21) | HSPF 8.5 or greater. Must be residence's primary heat source and replace electric forced air furnace. Energy Trust recommends electric auxiliary heat be locked out by thermostat at 35°F or per manufacturer's recommended energy saving setting. Must be installed between January 1, 2021 and March 31, 2021. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. | \$950 |
| <input type="checkbox"/> Ducted heat pump | HSPF 8.5 or greater. Must be residence's primary heat source and replace electric forced air furnace. Energy Trust recommends electric auxiliary heat be locked out by thermostat at 35°F or per manufacturer's recommended energy saving setting. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. | \$700 |
| <input type="checkbox"/> Ducted heat pump in a single-family rental property (installed 1/1/21 – 3/31/21) | HSPF 8.5 or greater. Must be residence's primary heat source and replace electric forced air furnace. Energy Trust recommends electric auxiliary heat be locked out by thermostat at 35°F or per manufacturer's recommended energy saving setting. Must be offered as an Energy Trust instant incentive by an approved trade ally to qualify and installed between January 1, 2021 and March 31, 2021. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. | \$1250 |
| <input type="checkbox"/> Ducted heat pump in a single-family rental property | HSPF 8.5 or greater. Must be residence's primary heat source and replace electric forced air furnace. Energy Trust recommends electric auxiliary heat be locked out by thermostat at 35°F or per manufacturer's recommended energy saving setting. Must be offered as an Energy Trust instant incentive by an approved trade ally to qualify. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. | \$1000 |

Ducted heat pump incentives are available at an increased incentive amount for Oregon residents that qualify for Savings Within Reach. Contact your Energy Trust account manager for more information on how to offer increased incentives.

What type of heating system did this replace? Electric furnace Other:

Is an AHRI certificate attached to this application? Yes If no, provide heat pump outdoor unit information below:

Installed Cost \$

| | | | |
|------------------|--------------|-------|----------|
| Heat Pump | HSPF | EER | SEER |
| | Manufacturer | Model | Serial # |

Smart Thermostat Incentive *For self-installed projects, apply online at www.energytrust.org/now or use Form 320S. 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 |
|---|---|-------------------|
| <input type="checkbox"/> Smart thermostat | Residence must be primarily heated by an electric furnace, gas furnace, or ducted heat pump. Thermostat must be connected to the internet through a Wi-Fi network and configured with the home's location. Visit www.energytrust.org/thermostat for eligible models. Cannot be combined with other controls incentives. | \$100 |
| Thermostat | Manufacturer: | Installed Cost \$ |
| | Model Name: | Model #: |

Residential Heating and Cooling Incentives, Contractor Install

Residential | Incentive Application | Form 320_{C-HVAC}



Gas Fireplace Incentives *Oregon residences must be serviced by NW Natural, Cascade Natural Gas or Avista. Washington residences must be serviced by NW Natural.*

| 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 . A CO monitor is required on every floor with a bedroom. | \$250 |
| | FE of 70% - 74.9% with electronic pilot ignition. For a list of eligible models visit www.energytrust.org/fireplace . A CO monitor is required on every floor with a bedroom. | \$150 |
| FE: % | Manufacturer | Model |
| Serial # | Installed cost: \$ (including equipment) | |

Gas Furnace Rental Property Incentives *Oregon residences must be primarily heated by NW Natural, Cascade Natural Gas or Avista. Washington residences must be primarily heated by NW Natural.*

| Upgrade type | Requirements | Incentive amount |
|---|---|------------------|
| <input type="checkbox"/> Gas furnace installed in a single-family rental property limited-time bonus (installed 9/1/20 – 3/31/21) | Must be residence's primary heat source with AFUE of 90% or greater. Not eligible for gas furnaces used as backup for high-efficiency heat pumps. Residence must be single-family or manufactured home. A CO monitor is required on every floor with a bedroom. Must be offered as an Energy Trust instant incentive by an approved trade ally to qualify and installed between September 1, 2020 and March 31, 2021. Cannot be combined with other gas furnace incentives. | \$1000 |
| <input type="checkbox"/> Gas furnace installed a single-family rental property | Must be residence's primary heat source with AFUE of 90% or greater. Not eligible for gas furnaces used as backup for high-efficiency heat pumps. Residence cannot be owner-occupied and must be single-family or manufactured home. A CO monitor is required on every floor with a bedroom. Must be offered as an Energy Trust instant incentive by an approved trade ally to qualify. | \$550 |

What type of heating system did this replace? Gas furnace Electric furnace Oil heater Wood Other:

| | | |
|---|---------|--------------------|
| ECM? <input type="checkbox"/> Yes <input type="checkbox"/> No | AFUE: % | Installed Cost: \$ |
| Manufacturer: | Model: | Serial #: |

If an eligible air conditioner was installed with this gas furnace, please provide a customer signed [Form 320CAC](#) incentive application along with this application. For more information about Energy Trust's central air conditioner incentive, visit: www.energytrust.org/central-air-conditioners.

Gas Furnace Incentives *Residence must be located in Washington and serviced by NW Natural.*

| Upgrade type | Requirements | Incentive amount |
|--|---|------------------|
| <input type="checkbox"/> Gas furnace limited-time bonus (installed 9/1/20 – 3/31/21) | Must be residence's primary heat source with AFUE of 95% or greater. Not eligible for gas furnaces used as backup for high-efficiency heat pumps. A CO monitor is required on every floor with a bedroom. Must be installed between September 1, 2020 and March 31, 2021. Cannot be combined with other gas furnace incentives. | \$1000 |
| <input type="checkbox"/> Gas furnace | Must be residence's primary heat source with AFUE of 95% or greater. Not eligible for gas furnaces used as backup for high-efficiency heat pumps. A CO monitor is required on every floor with a bedroom. | \$550 |

Gas furnace incentives are available at an increased incentive amount for Oregon residents that qualify for Savings Within Reach. Contact your Energy Trust account manager for more information on how to offer increased incentives.

| | | |
|---|---------|--------------------|
| ECM? <input type="checkbox"/> Yes <input type="checkbox"/> No | AFUE: % | Installed Cost: \$ |
| Manufacturer: | Model: | Serial #: |

What type of heating system did this replace? Gas furnace Electric furnace Oil heater Wood Other:

Residential Heating and Cooling Incentives, Contractor Install

Residential | Incentive Application | Form 320_{C-HVAC}



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. **Energy Trust 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, 2021. Please allow 4-6 weeks for incentive processing.**

ELIGIBILITY: Incentives are available to eligible Customers who are: (i) Oregon residential electric service customers of Portland General Electric 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 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 and Avista customers who heat their homes with natural gas. Final determination of eligibility shall rest solely with Energy Trust. All measures must be installed by an Energy Trust trade ally contractor or any other Oregon or Washington licensed contractor.

ELIGIBLE PRODUCTS: Products 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, 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 unless submitted as an instant incentive project. Instant incentive projects will be paid to the contractor.

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. 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. 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 and the contractor signing this application to access utility energy usage data relating to the property on which energy-saving measures have been completed and/or installed. To do so, Energy Trust may access the electric and natural gas accounts and thermostat usage information at the physical address of the project, and the contractor may access thermostat usage information at the physical address of the project. Customer agrees to provide reasonable assistance to Energy Trust to obtain such information. Customer also authorizes the contractor signing this application 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.