

# Residential Weatherization Incentives, Contractor Install

Residential | Incentive Application | Form 320C-WX



## Want your incentive faster?



Apply online.

Visit [www.energytrust.org/now](http://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 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, 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 \_\_\_\_\_

## 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

Residence type:  Single-family home  Rowhouse  Condo  Triplex  Manufactured home  Townhouse  Duplex  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](#).

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 Weatherization Incentives, Contractor Install

Residential | Incentive Application | Form 320<sub>C-WX</sub>



**Insulation Incentives<sup>1</sup>** For self-installed projects, apply online at [www.energytrust.org/now](http://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.

Attic, wall and floor insulation projects 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.

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	Rental**
Wall (includes rim joist and knee wall)	R-4	R-11 or fill cavity	_____ sq.ft. (total of all types)	R-	R-	<input type="checkbox"/>	\$	\$ .30	\$ .60	\$ .50

- If applying for multiple wall insulation types, provide beginning R-value value of wall insulation type with largest sq. ft installed.
- Maximum wall insulation incentive for Oregon owner-occupied single-family residences heated with gas is \$150. Application must also include a qualifying attic insulation upgrade.
- For rim joist insulation to qualify, must be insulated to R-15 or fill cavity. For knee wall insulation to qualify, must be insulated to R-15 for 2x4 cavities; R-21 for 2x6 cavities

Attic	R-11	R-38	sq.ft.	R-	R-	-	\$	\$ .25	\$ .60	\$ .50
Floor	R-0	R-30 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	\$ .30	\$ .60	\$ .40

Maximum floor insulation incentive for owner-occupied Oregon single-family residences heated with gas is \$150 and application must also include a qualifying attic insulation upgrade unless the site is a manufactured home.

\* Manufactured homes are not eligible for attic, wall, knee wall or rim joist insulation incentives. All exterior wall surfaces must be insulated to qualify for wall insulation. Attic insulation must be R-19 or higher for knee wall insulation to be eligible for an incentive.

\*\* Multifamily residences are not eligible for increased rental property incentives. For more information about Oregon multifamily incentives, including stacked units, visit [www.energytrust.org/multifamily](http://www.energytrust.org/multifamily)

**Window Incentives<sup>1</sup>** Windows must be installed in a heated area of the home and replace single or double paned windows. Properties in Oregon must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Properties in Washington must be primarily heated by NW Natural.

Window type	Installed cost	U-Value	Total area installed	Total # of windows installed	Incentive amount
<input type="checkbox"/> U-Value ≤ 0.27	\$	U-	sq. ft.		\$4.00 per sq. ft.
<input type="checkbox"/> U-Value 0.28 - 0.30	\$	U-	sq. ft.		\$1.75 per sq. ft.

**Supporting documentation must be attached to all window applications:**

- Proof of U-Value for each window
- Proof of size for each window
- Paid in full purchase and install invoicing

**Accepted proof of U-Value:**

Attach copies of the NFRC stickers for all windows installed **OR** the window manufacturer's packing slip with U-Values listed for all windows installed.

**Accepted proof of size:**

Attach an itemized invoice showing window dimensions and U-Value from manufacturer, distributor, retailer or contractor for all windows installed **OR** a completed [Windows Addendum](#) form.

<sup>1</sup>For Oregon multifamily residences, floor insulation, wall insulation, knee wall insulation, rim joist insulation, and windows must be installed in a duplex, triplex, fourplex, or side-by-side property (townhouse or rowhouse). Multifamily residences are not eligible for increased rental property incentives. For more information about Oregon multifamily incentives, including stacked units, visit [www.energytrust.org/multifamily](http://www.energytrust.org/multifamily)

# Residential Weatherization Incentives, Contractor Install

Residential | Incentive Application | Form 320<sub>C-WX</sub>



## 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. **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, 2020. Please allow 4-6 weeks for incentive processing.**

**ELIGIBILITY:** Incentives are available to eligible Customers who are: (i) Oregon residential electric service customers of 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 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.

**ELIGIBLE PRODUCTS:** Products must meet Energy Trust energy efficiency specifications. These specifications may be found on the web at [www.energytrust.org](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 unless submitted as an instant incentive project. Instant incentive projects will be paid to the contractor. All measures must be installed by an Energy Trust trade ally contractor or any other Oregon or Washington licensed 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](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. 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.