

# Oregon Residential, Extended Capacity Heat Pump Install

Residential | Incentive Application | Form 320<sub>ECHP</sub>



## Steps to completion:

- Contractor makes** an energy-saving improvement in an existing single-family or manufactured home.
- Contractor and Customer completes** 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
- Contractor or Customer submits** forms by mail or email documentation together to:  
**Energy Trust of Oregon Residential**  
1819 SW 5th Ave #331  
Portland, OR 97201  
1.866.311.1822 phone  
[residentialforms@energytrust.org](mailto:residentialforms@energytrust.org)
- Contractor or Customer receives** their 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

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 \_\_\_\_\_ OR \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Mailing address (if different than site) \_\_\_\_\_ City \_\_\_\_\_ OR \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Primary phone ☐ Home ☐ Work ☐ Cell \_\_\_\_\_ Other Phone ☐ Home ☐ Work ☐ Cell \_\_\_\_\_

## Utility Information

Electric utility\*: ☐ PGE ☐ Pacific Power

*\*Property 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 \_\_\_\_\_ Number of levels \_\_\_\_\_

Water heating fuel ☐ Electricity ☐ Natural gas ☐ Propane

Foundation/  
basement ☐ Crawlspace no vapor barrier ☐ Full basement  
☐ Slab on grade ☐ Crawlspace w/ vapor barrier  
☐ Half basement ☐ Garage/basement combo  
☐ Other \_\_\_\_\_

Residence type: ☐ Single-family home ☐ Manufactured home

Are you an **Energy Trust trade ally** submitting ☐ Yes, instant incentive \$  
this as an **Instant Incentive** project? 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 upgrades 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 this is 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) \_\_\_\_\_

## Trade Ally (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 this is 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 [Residential Specifications Manual](#) and all other Energy Trust program requirements.*



Trade ally signature \_\_\_\_\_ Full name (please print) \_\_\_\_\_ Date \_\_\_\_\_

Trade ally company \_\_\_\_\_ Install date \_\_\_\_\_

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## Previous Heating System Information

Heating system replaced ☐ N/A ☐ Electric baseboard ☐ Electric furnace ☐ Heat pump ☐ Propane heat  
(check one) ☐ Gas fireplace ☐ Gas furnace ☐ Hydronic (boiler) ☐ Wood heat ☐ Other \_\_\_\_\_

## Additional Heating System Information (if applicable)

Select any **secondary** heat sources the home has: ☐ Gas fireplace ☐ Hydronic (boiler) ☐ Electric baseboard  
☐ Electric furnace ☐ Gas furnace ☐ Wood heat  
☐ Other:

## Extended Capacity Ducted Heat Pump Incentive (select one) Residence must be located in Oregon and primarily heated by Portland General Electric (PGE) or Pacific Power.

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Extended capacity heat pump	<ul style="list-style-type: none"> <li>Must be residence's primary heating source.</li> <li>Heat pump must be a central ducted system included in Energy Trust's list of <a href="#">qualifying products</a>. Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available.</li> <li>Heat pump <b>cannot</b> have a backup gas heating system.</li> <li>Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives.</li> <li><b>Indoor Configuration:</b> Eligible systems configurations must include a central ducted system with traditional air handler (<b>slim duct types do not qualify</b>) serving the primary living space of the home.</li> </ul>	<b>\$1,000</b>
<input type="checkbox"/> Extended capacity heat pump installed in a rental property	<ul style="list-style-type: none"> <li>Must be residence's primary heating source.</li> <li>Heat pump must be a central ducted system included in Energy Trust's list of <a href="#">qualifying products</a>. Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available.</li> <li>Heat pump <b>cannot</b> have a backup gas heating system.</li> <li>Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives.</li> <li><b>Indoor Configuration:</b> Eligible systems configurations must include a central ducted system with traditional air handler (<b>slim duct types do not qualify</b>) serving the primary living space of the home.</li> <li><b>Must be offered as an Energy Trust instant incentive by an approved trade ally to qualify.</b></li> </ul>	<b>\$2,000</b>
<input type="checkbox"/> Extended capacity heat pump <b>replacing electric forced air furnace</b>	<ul style="list-style-type: none"> <li>Must replace electric forced air furnace as residence's primary heating source.</li> <li>Heat pump must be a central ducted system included in Energy Trust's list of <a href="#">qualifying products</a>. Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available.</li> <li>Heat pump <b>cannot</b> have a backup gas heating system.</li> <li>Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives.</li> <li><b>Indoor Configuration:</b> Eligible systems configurations must include a central ducted system with traditional air handler (<b>slim duct types do not qualify</b>) serving the primary living space of the home.</li> </ul>	<b>\$3,000</b>

I have attached an AHRI certificate: ☐ Yes ☐ No - please provide unit information below:

Installed Cost \$

Manufacturer:

HSPF2:

EER2:

SEER2:

Model:

Serial #:

Indoor Model:

### Thermostat

Compressor control set: °F

Auxiliary heat lockout set: °F

Manufacturer:

Model Name:

Model #:

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Additional Project Information			
Ductwork	Duct material:	<input type="checkbox"/> Sheet Metal	Duct insulation R Value: R-
		<input type="checkbox"/> Flex	Duct system location:
	<div>% of duct system is interior</div> <div>% of duct system is exterior</div>		
Was the duct work improved? If so, please describe (i.e air or duct sealing):			
Commissioning			
	Was there additional commissioning performed? If so, please describe (i.e air flow testing):		
System Design			
	I have attached a heat load calculation sheet: <input type="checkbox"/> Yes <input type="checkbox"/> No – please explain how unit sizing was determined:		

# Oregon Residential, Extended Capacity Heat Pump Install

Residential | Incentive Application | Form 320E<sub>CHP</sub>



## Terms and Conditions

**APPLICATION:** This application and any required additional documentation must be filled out completely, truthfully and accurately. Customer and Contractor may wish to retain copies 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.**

**ELIGIBILITY:** Incentives listed on **Form 320E<sub>CHP</sub>** are available for eligible customers who are Oregon residential electric service customers of Portland General Electric or Pacific Power. 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 at <http://www.energytrust.org> and are subject to change. If you or your trade ally contractor are not sure of the specifications, please call Energy Trust before proceeding.

**WORK QUALITY VERIFICATION:** Prior to any payment of incentives, Trade ally contractor will verify that the installed energy-saving upgrades meet Energy Trust of Oregon specifications (as defined by 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:** Subject to funding availability, incentives will be paid after: (i) completion and/or installation of the energy-saving upgrades, (ii) verification of the completion and/or installation of the upgrades, (iii) timely submission of all required documentation of upgrades. Incentives will be paid directly to the trade ally contractor. Upgrades must be installed by an Energy Trust trade ally contractor. **Please allow 4-6 weeks for incentive processing.** Failure to deliver all required information may result in a delay or withholding of payment.

**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 upgrades completed and/or installed as set forth in documentation accompanying this application are limited to the amounts provided by Energy Trust. **Incentive amounts are valid for installations done through December 31, 2025** Incentives offers are subject to funding availability and may change. Current incentive amounts are identified 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 that may be imposed 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.

**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 upgrades on the property on which those upgrades are completed and/or installed and that any necessary consent has been obtained.

**ACCESS AND EVALUATION:** Energy Trust and/or its representatives may request access to the property on which energy-saving upgrades 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 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. Customer assumes the risk of any loss or damage(s) that Customer may suffer in connection with the upgrades. Energy Trust does not guarantee any particular energy-saving upgrades 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, including without limitation interval data, relating to the property on which energy-saving upgrades 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, the Oregon Legislature, and/or other government agencies. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate, unless a specific disclosure is required by applicable law or governmental or court order.

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## Optional Customer Demographic Information (If completed, choose all that apply)

### Why is Energy Trust asking for this information?

Energy Trust is asking customers to submit demographic information because it is our responsibility to ensure that all customers can directly benefit from our services. We believe demographic data collection is a simple yet powerful tool for pursuing equity and inclusion in our work and programs. Receiving the information below about our customers will give us a clearer picture of program participation rates within our Residential Programs. We will use that information to assess our offers and identify barriers to participation, enabling us to develop and improve offers to reduce or eliminate those barriers. Questions about household income and full-time residents can help identify if you and your household may be eligible for increased Energy Trust incentives

Providing this information is optional, does not impact your participation in the program, and will be held confidential by Energy Trust.

### Which of the following racial and ethnic backgrounds best describe you? (choose all that apply)

- ☐ Asian or Asian American
- ☐ Black or African American
- ☐ Hispanic or Latino/a/x
- ☐ Middle Eastern or North African
- ☐ Native American or Alaskan Native
- ☐ Native Hawaiian or other Pacific Islander
- ☐ White
- ☐ Prefer not to answer
- ☐ Prefer to self-describe: \_\_\_\_\_

### What is the primary language(s) used in your household? (select all that apply)

- ☐ Arabic
- ☐ Cantonese
- ☐ English
- ☐ French
- ☐ German
- ☐ Japanese
- ☐ Korean
- ☐ Mandarin
- ☐ Another language: \_\_\_\_\_
- ☐ Marshallese
- ☐ Russian
- ☐ Spanish
- ☐ Tagalog
- ☐ Thai
- ☐ Ukrainian
- ☐ Vietnamese
- ☐ Prefer not to answer

### Income

Using the chart below, select one of the following options. My household income is:

- ☐ **Above the Middle Threshold income level** as indicated in the Income Chart below.
- ☐ **Between the Lower and Middle Threshold income levels** as indicated in the Income Chart below.
- ☐ **Below the Lower Threshold income level** for my household size as indicated in the Income Chart below. I understand that because of my income level, I am eligible to receive weatherization services and/or other energy upgrades from Oregon Housing and Community Services (OHCS) that may be available to me for free, but I still choose to participate in this program.

Household Size	Lower Threshold	Middle Threshold
1	\$30,120	\$66,854
2	\$40,880	\$87,424
3	\$51,640	\$107,994
4	\$62,400	\$128,564
5	\$73,160	\$149,134
6	\$83,920	\$169,704
7	\$94,680	\$173,562
8	\$105,440	\$177,418

Questions about household income and full-time residents can help identify if you and your household may be eligible for increased Energy Trust incentives