



**Steps to completion:**

- 1 Install** an eligible energy efficiency improvement in an existing residential property.
- 2 Complete** application information, including:
  - Trade ally **and** customer signatures
  - Invoices billing the customer for purchase and installation marked "Paid in full"
  - Invoice billing the customer must show incentive deductions
- 3 Submit** form by mail, fax or email and all 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** trade ally.
- Energy Trust must receive applications within **60 days** from the date of installation.
- Incomplete information will result in delayed payment or disqualification**

**Customer Information**

This residence is  Owner occupied  A rental property I own

OR

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:  Pacific Power  Other \_\_\_\_\_

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


**Site Information**

Year built:	Square feet:	Number of levels:
Primary heating system (check one)	<input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Ducted heat pump	<input type="checkbox"/> Ductless heat pump <input type="checkbox"/> Gas furnace <input type="checkbox"/> Gas fireplace <input type="checkbox"/> Wood <input type="checkbox"/> Propane <input type="checkbox"/> Other _____
Water heating fuel	<input type="checkbox"/> Electricity <input type="checkbox"/> Natural gas	<input type="checkbox"/> Propane
Foundation/basement	<input type="checkbox"/> Crawlspace no vapor barrier <input type="checkbox"/> Crawlspace w/ vapor barrier <input type="checkbox"/> Garage/basement combo	<input type="checkbox"/> Full basement <input type="checkbox"/> Half basement <input type="checkbox"/> Other
Property type:	<input type="checkbox"/> Single-family home <input type="checkbox"/> Manufactured home	<input type="checkbox"/> Duplex <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex <input type="checkbox"/> Rowhouse <input type="checkbox"/> Townhouse

Instant incentive amount listed on invoice \$ \_\_\_\_\_  
 (incentive cannot exceed project cost):

**Customer Name and Signature**


*By signing below, Customer agrees to the terms and conditions of this application and authorizes Trade Ally 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 Trade Ally as of the signature date below and all accompanying documentation is complete and accurate. **Customer understands and agrees that Energy Trust will issue incentive check for incentives that meet Energy Trust requirements to the Trade Ally 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		

**Trade Ally Name and Signature**

*By signing below, Trade Ally 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. To receive incentives, **Trade Ally must be enrolled as an approved program participant and agrees to the terms and conditions set forth in Form 371NWN: Increased Incentives for NW Natural Customers.** Additionally, all work must comply with the Home Retrofit [Specifications Manual](#).*



Trade Ally signature	Full name (please print)	Date
Trade Ally company	Install date	

# Limited-time Increased Incentives for NW Natural Customers

Residential and Existing Multifamily | Incentive Application | Form 320<sub>NWN</sub>



**Gas Furnace Incentives for NW Natural Customers<sup>1</sup>** *Residence must be serviced by NW Natural and located within the Area of Eligibility on page 5. If residence is not serviced by NW Natural or is located outside of the Area of Eligibility, please visit [energytrust.org](http://energytrust.org) to apply for this incentive.*

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Gas furnace	Must be residence's primary heat source with <b>AFUE of 90%</b> or greater. Not eligible for gas furnaces used as backup for high-efficiency heat pumps, also known as hybrid systems. A CO monitor is required on every floor with a bedroom.	<b>\$2500</b>
ECM? <input type="checkbox"/> Yes <input type="checkbox"/> No	AFUE: %	Installed Cost: \$
Manufacturer:	Model:	Serial #:
What type of heating system did this replace? <input type="checkbox"/> Gas furnace <input type="checkbox"/> Electric furnace <input type="checkbox"/> Oil heater <input type="checkbox"/> Wood <input type="checkbox"/> Other:		

**Smart Thermostat Incentive** *Residence must be serviced by NW Natural and located within the Area of Eligibility on page 5. If residence is not serviced by NW Natural or is located outside of the Area of Eligibility, please visit [energytrust.org](http://energytrust.org) to apply for this incentive.*

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Smart thermostat	Residence must be primarily heated by a 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">www.energytrust.org/thermostat</a> for eligible models. Cannot be combined with other Energy Trust controls incentives or smart thermostat offers.	<b>\$100</b>
<b>Thermostat</b>	Manufacturer:	Installed Cost \$
	Model Name:	Model #:

<sup>1</sup> For multifamily residences, gas furnace, central air conditioner, insulation, gas fireplace and window upgrades must be installed in a duplex, triplex, fourplex, or side-by-side property (such as a townhouse or rowhouse). Stacked structures with 5 or more units do not qualify.

# Limited-time Increased Incentives for NW Natural Customers

Residential and Existing Multifamily | Incentive Application | Form 320<sub>NWN</sub>



**Cooling Incentive** *One incentive per residence. Residence must be located within the Area of Eligibility on page 5 and serviced by Pacific Power. If residence is located outside of the Area of Eligibility, please visit [energytrust.org](http://energytrust.org) to apply for this incentive.*

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Central Air Conditioner	Must be a qualifying central air conditioner serving most or all of the home. Residences primarily heated with a heat pump do not qualify. Nominal SEER rating of the outdoor unit as listed by the manufacturer must be <b>15 or greater</b> . System EER must be 12 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution ( <a href="http://AHRI.net.org">AHRI.net.org</a> ). For list of known qualifying units, please visit: <a href="http://www.energytrust.org/central-air-conditioners/">www.energytrust.org/central-air-conditioners/</a>	<b>\$100</b>
<input type="checkbox"/> Central Air Conditioner	Must be a qualifying central air conditioner serving most or all of the home. Residences primarily heated with a heat pump do not qualify. Nominal SEER rating of the outdoor unit as listed by the manufacturer must be <b>16 or greater</b> . System EER must be 12 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution ( <a href="http://AHRI.net.org">AHRI.net.org</a> ). For list of known qualifying units, please visit: <a href="http://www.energytrust.org/central-air-conditioners/">www.energytrust.org/central-air-conditioners/</a>	<b>\$250</b>

Central Air Conditioner Installed Cost: \$	New heating system installed cost (if applicable): \$	System Capacity (Tons):
Did this Central Air Conditioner replace an existing Central Air Conditioner?		<input type="checkbox"/> Yes <input type="checkbox"/> No
If an eligible gas furnace was installed in an Oregon rental property with this air conditioner, please provide a customer signed <a href="#">Form 320C-HVAC</a> incentive application along with this application. For more information about Energy Trust's gas furnace incentives, contact us at 1.866.311.1822 or <a href="mailto:residential@energytrust.org">residential@energytrust.org</a> .		
Is an AHRI certificate attached to this application?	<input type="checkbox"/> Yes - provide installed system's AHRI certificate number:	
	<input type="checkbox"/> No - (note: applications submitted without a matching AHRI certificate may result in delayed payment or disqualification).	

## Cooling System Information *Required for all submissions*

Outdoor Unit Manufacturer:	Outdoor Unit Model Number:	
Indoor Unit Evaporator Coil Manufacturer:	Indoor Unit Evaporator Coil Model:	
Furnace/Blower Manufacturer (new or existing):	Furnace/Blower Model # (new or existing):	
Outdoor unit SEER per manufacturer:	System EER:	System Capacity (Tons):
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.		

<sup>1</sup> For multifamily residences, gas furnace, central air conditioner, insulation, gas fireplace and window upgrades must be installed in a duplex, triplex, fourplex, or side-by-side property (such as a townhouse or rowhouse). Stacked structures with 5 or more units do not qualify.

# Limited-time Increased Incentives for NW Natural Customers

Residential and Existing Multifamily | Incentive Application | Form 320<sub>NWN</sub>



**Gas Fireplace Incentives<sup>1</sup>** Residence must be serviced by NW Natural and located within the Area of Eligibility on page 5. If residence is not serviced by NW Natural or is located outside of the Area of Eligibility, please visit [energytrust.org](http://energytrust.org) to apply for this incentive.

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Gas fireplace	FE of 70% or greater with electronic pilot ignition. Unit must provide heat using natural gas provided by NW Natural. For a list of eligible models visit <a href="http://energytrust.org/fireplace">energytrust.org/fireplace</a> . A CO monitor is required on every floor with a bedroom.	<b>\$850</b>
<b>Fireplace</b>	FE:        %                      Manufacturer:	Model:
	Serial #:	Installed cost:        \$ (including equipment)

**Window Incentives<sup>1</sup>** Residence must be primarily heated by NW Natural and located within the Area of Eligibility on page 5. If residence is not primarily heated by NW Natural or is located outside of the Area of Eligibility, please visit [energytrust.org](http://energytrust.org) to apply for this incentive.

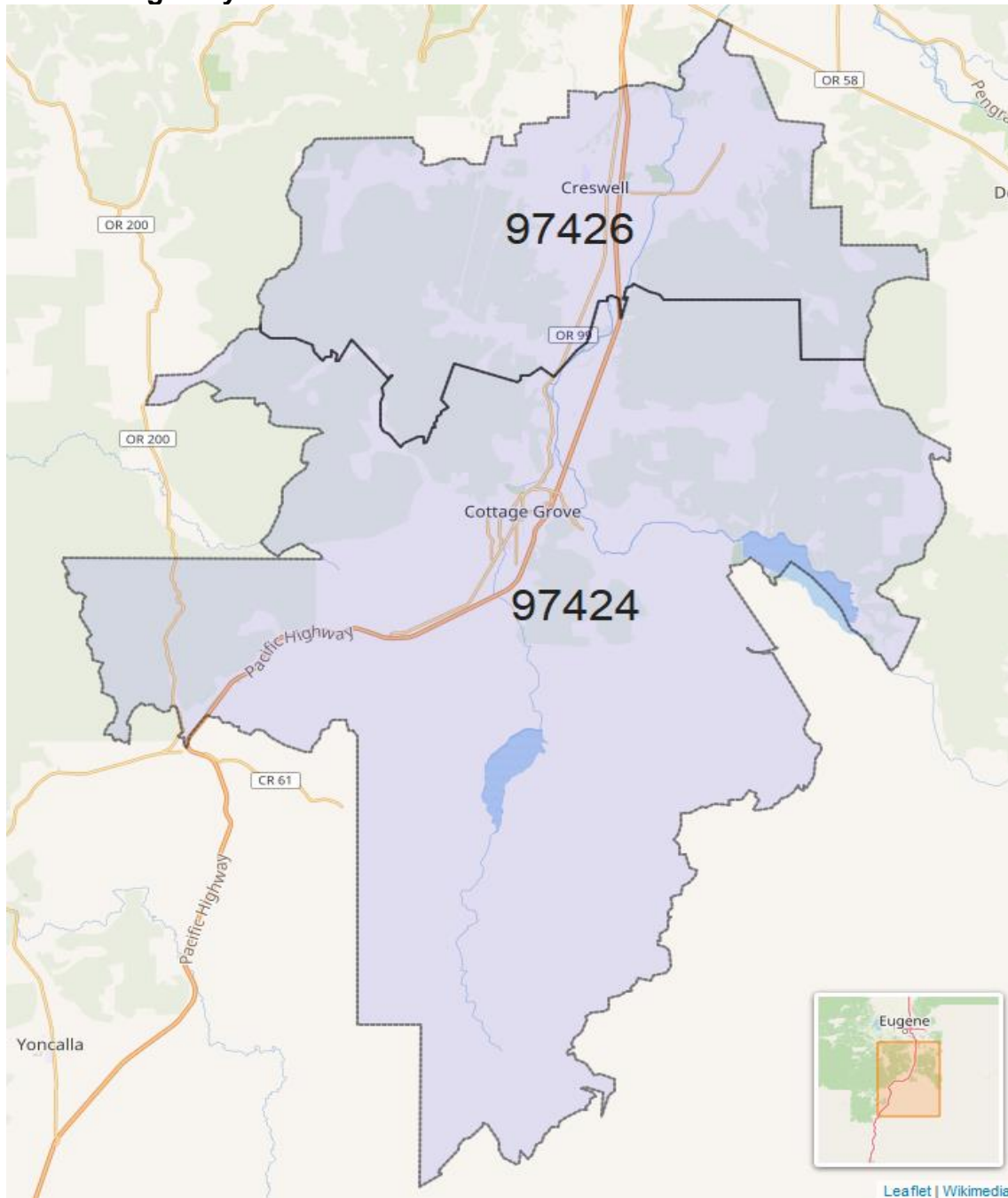
Window type	Installed cost	U-Value	Total area installed	Total # of windows installed	Incentive amount
<input type="checkbox"/> U-Value ≤ 0.24	\$	U-	sq. ft.		<b>\$10 per sq. ft.</b>
<input type="checkbox"/> U-Value 0.25 – 0.27	\$	U-	sq. ft.		<b>\$8 per sq. ft.</b>
<input type="checkbox"/> U-Value 0.28 - 0.30	\$	U-	sq. ft.		<b>\$5 per sq. ft.</b>
<b>Supporting documentation must be attached to all window applications:</b>					
<ul style="list-style-type: none"> <li>• Proof of U-Value for each window</li> <li>• Proof of size for each window</li> <li>• Paid in full purchase and install invoicing</li> </ul>		<input type="checkbox"/> <b>Accepted proof of U-Value:</b>	Attach copies of the NFRC stickers for all windows installed <b>OR</b> the window manufacturer's packing slip with U-Values listed for all windows installed.		
		<input type="checkbox"/> <b>Accepted proof of size:</b>	Attach an itemized invoice showing window dimensions from manufacturer, distributor, retailer or contractor for all windows installed <b>OR</b> a completed <a href="#">Windows Addendum</a> form.		

**Insulation Incentives for NW Natural Customers<sup>1</sup>** Residence must be primarily heated by NW Natural and located within the Area of Eligibility on page 5. If residence is not primarily heated by NW Natural or is located outside of the Area of Eligibility, please visit [energytrust.org](http://energytrust.org) to apply for this incentive.

Insulation type*	Max beginning R-value	Insulate to:	Quantity installed	Beginning R-value	Ending R-value	Cavity filled?	Installed cost	Incentive per sq. ft
Attic	R-11	R-38	sq.ft.	R-	R-	-	\$	<b>\$1.50</b>
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"/>	\$	<b>\$2.50</b>
<ul style="list-style-type: none"> <li>• If applying for multiple wall insulation types, provide beginning R-value of wall insulation type with largest sq. ft installed.</li> <li>• 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</li> </ul>								
Floor	R-0	R-30 or fill cavity	sq.ft.	R-	R-	<input type="checkbox"/>	\$	<b>\$2.00</b>
* Manufactured residences are not eligible for attic or wall insulation incentives. All exterior wall surfaces must be insulated to qualify for wall insulation incentive. Attic insulation must be R-19 or higher for knee wall insulation to be eligible for an incentive.								

<sup>1</sup> For multifamily residences, gas furnace, central air conditioner, insulation, gas fireplace and window upgrades must be installed in a duplex, triplex, fourplex, or side-by-side property (such as a townhouse or rowhouse). Stacked structures with 5 or more units do not qualify.

////////////////////////////////////  
**Area of Eligibility**



For questions regarding a residence's eligibility for Energy Trust's Limited-time Increased Incentives for NW Natural Customers, visit [energytrust.org/nwnaturalpromo/](https://energytrust.org/nwnaturalpromo/) or contact us at 1.866.311.1822 or [Residential@energytrust.org](mailto:Residential@energytrust.org).

If you are not a customer of NW Natural or live outside of the Area of Eligibility displayed above, please visit [energytrust.org](https://energytrust.org) to apply for Energy Trust incentives.



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 and Multifamily programs must receive applications from program-approved trade allies within 60 days after the date of installation. Incentives offers are subject to funding availability and may change. Incentive amounts are valid for installations August 1, 2021 through July 31, 2022. Please allow 4-6 weeks for incentive processing.

ELIGIBILITY: Incentives listed in this application are available to eligible Customers who are Oregon residential natural gas service customers of NW Natural within the territory displayed on page 5. 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 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: 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: Energy Trust will pay incentives to program-approved trade ally 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. Incentives will be paid directly to trade ally; trade ally will reduce overall billing to Customer by applicable incentive amounts.

INVOICE REQUIREMENTS: The invoice documentation accompanying this application must itemize the products purchased and/or work performed. This invoice must show: (i) the date of purchase and itemized price paid, (ii) the size, type, make, model or part number for the products, and (iii) a description of any installation or other labor charges. Invoice must show total cost before incentive is applied.

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 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 and contractor 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, while 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.