

# Payment Redirect Application

## EPS New Construction | Form 640<sub>PR</sub>



### Steps to completion:

- 1 Technician or verifier approval through Energy Trust of Oregon's EPS New Construction program.
- 2 **Complete** and sign application, including:
  - ☐ Signature
  - ☐ Site or Development address(es)
  - ☐ Redirect Payee W-9
- 3 **Submit** completed form and W-9 to:  
**Energy Trust of Oregon**  
**EPS New Construction**  
111 SW Columbia St, Suite 945  
Portland, OR 97204  
1.855.575.4315 fax  
[eps@energytrust.org](mailto:eps@energytrust.org)

### Need-to-know information:

- Please allow up to 60 days for your receipt of payment. If a W-9 is required, the payment will be made to the name on the W-9.
- Applicant Payee Company permits Energy Trust to pay any incentive to which they are entitled to the Redirect Payee Company and waives all rights to directly receive incentives for the identified energy-efficiency project(s) below.
- Applicant Payee Company understands that without complying with the term and conditions of this redirect payment application the EPS New Construction Program shall continue to pay Applicant Payee Company.
- Redirect Payee Company understands that it shall have no rights against Energy Trust or the PMC in the event that Energy Trust does not pay the incentive as a result of Applicant Payee Company failure to comply with this agreement or program requirements.

### Applicant Payee Company Information

Applicant Payee Company Name \_\_\_\_\_ Applicant Payee Contact Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone ☐ Home ☐ Work ☐ Cell \_\_\_\_\_ Email \_\_\_\_\_

Project Role: ☐ Modeler ☐ Verifier ☐ Builder ☐ Developer

### Project(s) Information

This application is for:

- ☐ All payee projects ☐ A subdivision (name): \_\_\_\_\_
- ☐ Project address(es): Please attach list of homes with site addresses for all homes to receive a payment redirect. Site addresses should include home number, street, city, state and zip code. If home number is not available lot number can be substituted.

### Redirect Payee Information

Redirect Payee Company Name \_\_\_\_\_ Payee Contact Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone ☐ Home ☐ Work ☐ Cell \_\_\_\_\_ Email \_\_\_\_\_

W-9 submitted to Energy Trust: ☐ Yes ☐ No

### Acceptance of Terms and Conditions

By signing this application, I verify that the information presented herein is true and correct. I understand and agree to the requirements and terms and conditions as set forth herein.

**SIGN  
HERE**

Applicant Payee Authorized Representative Name

Signature

Date

### Acceptance of Terms and Conditions

By signing this application, I verify that I am authorized to submit this application on behalf of the Applicant Payee listed above and that the information presented herein is true and correct. I understand and agree to the requirements and terms and conditions as set forth herein.

**SIGN  
HERE**

Redirect Payee Authorized Representative Name

Signature

Date

# Payment Redirect Application

EPS New Construction | Form 640PR



## Terms and Conditions

**APPLICATION:** This **Form 640PR** must be filled out completely, truthfully and accurately. Incentive Payees may wish to retain a copy of this application and any accompanying documentation submitted to Energy Trust of Oregon, Inc. under this program. Energy Trust will not be responsible for lost documentation pertaining to this application request.

**ELIGIBILITY:** Incentives for EPS homes are available to Trade Allies constructing homes through the EPS New Construction Program in Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas or Avista territories.

**PAYMENT:** Redirect Incentives will be paid: (i) on submission of the completed Redirect Application with all required information filled out, (ii) pending receipt of completed W-9, and (iii) home with EPS is complete. Energy Trust will confirm incentive level by database that field work was performed on a home applying for incentives through the EPS New Construction Program. Please allow up to 60 days for receipt of payment after verification and all paperwork listed above is received. Payments will be made to the Company designated as the Redirect Payee.

**INFORMATION RELEASE:** The Applicant understands and agrees that Energy Trust and/or its representatives may include a description of this application, including the Applicant's name, the Applicant's company name, services provided, project cost or energy savings, in reports, studies, and other documentation required by Energy Trust, its Board of Directors, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing & Community Services, the Oregon Legislature, funding utilities, and/or other government agencies. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate.

**TAX LIABILITY:** Energy Trust is not responsible for any tax liability imposed on the Applicant Payee or the Redirect Payee as a result of payment of the incentives. 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.

**DISCLAIMER / NO LIABILITY:** Applicant Payee and Redirect Payee understand that, while Energy Trust is providing Applicant Payee or Redirect Payee with funding for the incentives payment, Energy Trust is not supervising any work performed by Applicant Payee or Redirect Payee nor is Energy Trust responsible in any way for any work performed on the property. Energy Trust does not guarantee any particular energy savings results by its approval of the Application or by any other of its actions.

**SURVIVAL OF TERMS AND CONDITIONS:** Unless stated otherwise in this document, regardless of whether or not this application is approved, these terms and conditions shall survive the payments of any incentive payments provided hereunder.

## Resources

Link to W-9

[energytrust.org/w9](https://energytrust.org/w9)

Additional EPS New Construction Resources

[energytrust.org/trade-ally/programs/new-homes/resources/](https://energytrust.org/trade-ally/programs/new-homes/resources/)

## Contact Us

Energy Trust of Oregon EPS New Construction

Email: [eps@energytrust.org](mailto:eps@energytrust.org)

Phone: 1.877.283.0698