Incentive Application | Form 320 c



| Want your incentive faster? | Custome | | | | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | Promo Code (optional) |
|--|--|------------------------------------|-----------------------------------|--------------------------------------|---|-----------------------|
| Apply online. | Customer type | e: Hom | eowner [| ☐ Property ow | ner/manage | |
| Visit www.energytrust.org/now | *If you are a pro | operty owne | /manager, a | W-9 is required | I. Visit <u>www.e</u> | energytrust.org/w9. |
| Steps to completion: | | | | | , | OR |
| Make an energy saving improvement in an existing single family home. | Site address | | | City | | State Zip |
| 2 Complete application information, including: | Mailing address | (if different th | an sita) | City | | OR State Zip |
| Contractor and customer signatures Invoice billing the customer marked "Paid in full" | | | , | • | | r |
| • Supporting documentation (if applicable) | Primary phone | ☐ Home ☐ We | ork Cell | Other Phone | Home | e Work Cell |
| 3 Submit online form or mail, fax or email documentation together to: | Utility Info | ormation | | | | |
| Energy Trust of Oregon Existing Homes | Electric utility: | ☐ PGE | ☐ Pac | ific Power [| Other | |
| PO Box 40508 Portland, OR 97240 | Gas utility: | ☐ NW Natu | ıral 🗌 Cas | cade Natural [| ☐ Avista | Other |
| 1.866.311.1822 phone 1.866.516.7592 fax | Site Inforr | mation | | | | |
| hesforms@energytrust.org | Year built | | Square feet | t | Number of | levels |
| 4 Receive your check. Please allow six to eight weeks for incentive processing after | Primary heating | ☐ Electric | furnace | ☐ Ductless | heat pump | □ Wood |
| completed application and supporting documentation are received. | system | ☐ Electric | baseboard | ☐ Gas furn | nace | ☐ Propane |
| Need-to-know information: | (check one) | ☐ Ducted | heat pump | ☐ Gas fire | place | ☐ Other |
| This form should be completed by the customer and contractor. | Water heating | fuel | ☐ Electricity | / 🗆 ! | Natural gas | |
| Energy Trust must receive applications within | Foundation/ | | ace no vapor | _ | I basement | ☐ Slab on grade |
| 60 days from the date of installation. All information must be completed for | 60 days from the date of installation. ☐ Crawlspace w/ vapor barrier ☐ Half baseme | | | | | |
| processing; incomplete information will result in delayed payment or | Garage/basement combo Other | | | | | |
| disqualification. | Is this a manuf | factured home | .? ∐ Y ——— | ′es ☐ No | | |
| Customer Name and Signature | | | | | | |
| By signing below, Customer agrees to the terms and comor measure documentation to Energy Trust on Customer' Contractor has completed for Customer. By that authorize the signature date below, and that any accompanying inv | s behalf for all Éne ation, Customer re | ergy Trust ince epresents to Er | ntives that are ergy Trust tha | available for the at all measures ha | energy-saving | measures that |
| Customer signature | Full name (p | olease print a | nd use same | e name as on in | voice) | Date |
| Customer email address (application state | ıs updates are s | sent via email |) | | | |
| Contractor Name and Signature | | | | | | |
| By signing below, Contractor certifies that this application improvements associated with this incentive request were incentives, all work must comply with Existing Homes' Sp | e completed as of t | the signature o | late below. Inc | entives are payab | ble to Custome | rs only. To receive |
| - / | | | | | | |
| Contractor signature | Full name (p | lease print) | | | | Date |
| Contractor company | OCCB# (Non | n-trade ally or | ıly) | | | Install date |
| ☐ Project meets Home Performance with ENER | RGY STAR requ | uirements. E | 3PI technicia | an (print name) | | |





| Previous Heating System Information | | | | | | | | | | | | | | |
|---|---|-----------------|--|---|-------------------------------------|---------------|-------|----------------------------------|-----------|---------------------|--------|------------|---------------|-----------------|
| Have you replaced your primary heating system in the past year? ☐ Yes ☐ No ☐ System is being updated at this time | | | | | | | | | | | | | | |
| Heating system N /A | | | | ☐ Electric baseboard ☐ Ele | | | | ectric furnace | | Heat p | ump | □ I | Propane h | ıeat |
| replaced (check one) Gas fireplac | | | fireplace | ce Gas furnace Hy | | | Ну | vdronic (boiler) ☐ Wood heat ☐ O | | | Other | | | |
| Duc | tlace L | loat Dum | n Inco | ntivo | One incent | tivo nov roci | do | | | | | | | |
| | Ductless Heat Pump Incentive One incentive per residence. Upgrade type Requirements Incentive amount | | | | | | | | | | | | | |
| USDE of 0.0 or greater and must replace electric registance as the home's primary heating system | | | | | | | | | | | | | | |
| Must be an inverter-driven model installed by a NW Ductless Heat Pump Project installer. | | | | | | | | | Ψ000 | | | | | |
| Qty of | f outdoor | units | Qty of i | ndoor | units | Total capad | city | <u>'</u> | HSPF | | | Installe | ed Cost \$ | |
| Outde | oor unit ¹ | Manufacti | urer | | | Model # | | | | Serial # | | | | |
| Indoo | or unit ¹ | Model # | | | | | | | | | | | | |
| | | | | | t of one outdoor is installed, plea | | | | | | | oroduce si | ignificant ad | ditional energy |
| Duc | ted He | at Pump | Incent | tives | | | | | | | | | | |
| | Upgrade | type | | | | | | Requireme | nts | | | | Incen | tive amount |
| | | | | | existing heat p | pump or non | ı- | HSPF of 9.5 or greater. | | | | | \$500 | |
| electric heat (ex. oil, | | eat (ex. oil, p | ropane, (| gas, w | /ood) | | | HSPF of 9.0 to 9.49. | | | | \$250 | | |
| Ducted heat pump replacing electric resista | | | | | | | | | or greate | er. | | | | \$700 |
| (ex. baseboard, wall heaters, electric furnace) HSPF of 9.0 to 9.49. | | | | | | | | \$450 | | | | | | |
| | <i>Plus</i> heat | pump optim | ization – | Chec | kMe! or PTCS | S data form n | nu | st be submitte | ed with | your a _l | oplica | ation. | | \$150 |
| HSPF EER SEER | | | ER | CheckMe! or PTCS cost \$ | | | \$ | | Ins | talled co | st \$ | | | |
| Manufacturer Model # Serial # | | | | | | | | | | | | | | |
| Hea | t Pump | Advanc | ed Co | ntrol | Is Incentiv | /e For self- | in | stalled proje | cts use | Form | 320 | <u>S</u> . | | |
| | Upgrade | type | | | Requiremen | ts | | | | | | | Incen | tive amount |
| Heat pump advanced controls Must be added to an existing ducted heat pump with electric furnace backup. Must be an eligible model, visit http://www.energytrust.org/heatpumpcontrols for more information. Thermostat must be set to 35°F lockout or as close as possible. One incentive per residence. | | | | | | | \$150 | | | | | | | |
| Therr | nostat | Lockout tem | пр | | °F Instal | lled cost \$ | | | | | | | | |
| Information Manufacturer | | Model Name | | | Model # | | | | | | | | | |
| Gas Heating Incentives A CO monitor is required on every floor with a bedroom. | | | | | | | | | | | | | | |
| Upgrade type Requirements Incentive amount | | | | | | | | | | | | | | |
| Gas fireplace | | | FE of 75% or greater with electronic pilot ignition. For a list of eligible models visit www.energytrust.org/fireplace . | | | | | | | \$250 | | | | |
| | | | | FE of 70% or greater with electronic pilot ignition. For a list of eligible models visit www.energytrust.org/fireplace. | | | | | | | | \$150 | | |
| | Gas boiler AFUE of 88% or greater. | | | | | | | | | | | | \$200 | |
| | Gas furr | nace | | | le for Avista cu primary heat so | | у. | AFUE of 90% of | or greate | r. Furna | ace m | ust be the | е | \$200 |
| FE (fireplace) % AFUE (boiler or furnace) % Installed cost \$ | | | | | | | | | | | | | | |
| Manufacturor | | | | | Model # | <u> </u> | | | | Sorial # | | | | |





| Insulation Incentives For self-installed projects use Form 320S. | | | | | | | | | |
|--|---|----------------|--|-------------------|-----------------|--|--------------------|--|--|
| Upgrade type (max. beginning R-value) | | Installed cost | Beginning R-value | Ending R-value | Cavity filled | Quantity installed | Incentive amount | | |
| | Attic insulation (R-18) | \$ | R- | R- | | sq. ft. | \$0.25 per sq. ft. | | |
| | | | If beginning R-value is between R-13 and R-18, maximum attic insulation incentive is \$100. Electric and gas heated rental homes receive \$0.50 per sq. ft. if beginning R-value is ≤ R-12. | | | | | | |
| ☐ Wall in | | \$ | R- | R- | | sq. ft. | \$0.30 per sq. ft. | | |
| | Wall insulation (R-4) | include a qual | ifying attic insu | lation upgrad | de. | h gas is \$150 and applic q. ft. with no maximum | | | |
| | Floor insulation (R-0 if site | \$ | R- | R- | | sq. ft. | \$0.30 per sq. ft. | | |
| | built, R-11 for manufactured homes) | include a qual | ifying attic insu | lation upgrad | de unless the s | th gas is \$150 and appli site is a manufactured ho q. ft. with no maximum | ome. | | |
| | Knee wall insulation ¹ (R-4) | \$ | R- | R- | | sq. ft. | \$0.30 per sq. ft. | | |
| | Rim joist insulation (R-4) | \$ | R- | R- | - | sq. ft. | \$0.30 per sq. ft. | | |
| | Boiler pipe insulation (R-2) | \$ | R- | R- | - | ft. | \$0.50 per In. ft. | | |

¹ Existing attic insulation must be R-19 or higher for knee wall insulation to be incentivized on its own. See AT 2.6 at www.energytrust.org/ehspecs.

| Window Incentives Windows must be installed by an OCCB licensed contractor in a heated area of the home. | | | | | | | | | |
|--|----------------|----------------------------|--|------------------------------|------------------|--|--|--|--|
| Window type | Installed cost | U-Value | Total area installed | Total # of windows installed | Incentive amount | | | | |
| ☐ U-Value ≤ 0.27 | \$ | U | | sq. ft. | | | | | |
| U-Value 0.28 - 0.30 | \$ | U | | sq. ft. | | | | | |
| Supporting documentation must be attached to all window applications: Proof of U-Value for each window | | Accepted proof of U-Value: | · Installed (IP) the Window manifactiliter's nacking s | | | | | | |
| Proof of size for each wPaid in full purchase an | | window | | | | | | | |





| Water Heater Incentives Hybrid, condensing, and tankless water heaters do not qualify for these incentives. For self-installed projects, use Form 920C | | | | | | | | | |
|--|--|--|-------------------|-------|--|--|--|--|--|
| Upgrade type | | Incentive amount | | | | | | | |
| ☐ Tier 3 heat pump water heater | | Any tank size will qualify for Tier 3 incentive eligible Hot Water Solutions contractor, visual size of the size o | | | | | | | |
| ☐ Tier 2 heat pump water heater | and be installed by a rebate sit https://.hotwatersolutionsnw.o | rg. \$300 | | | | | | | |
| ☐ Tier 1 heat pump water heater | | Must have a capacity of 55 gallons or less | | \$150 | | | | | |
| Gas tank water heater | \$100 | | | | | | | | |
| EF . | Cap | pacity Gallons | Installed cost \$ | | | | | | |
| Manufacturer | Мо | del # | Serial # | | | | | | |
| Water heater location Garage Basement Crawlspace Main home Other | | | | | | | | | |

Incentive Application | Form 320c



Terms and Conditions

APPLICATION: This application and any required additional documentation must be filled out completely, truthfully and accurately. Customers are advised 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. Existing Homes 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 through December 31, 2017. Please allow six to eight weeks for incentive processing.

ELIGIBILITY: Incentives are available to approved Customers who are: (i) Oregon residential electric service customers of Portland General Electric or Pacific Power, and/or (ii) Oregon residential natural gas service customers of NW Natural, Cascade Natural Gas or Avista. 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 or Avista customers who heat their homes with natural gas. Incentives for energy-saving measures that help save on the cost of water heating are available to PGE and Pacific Power customers who heat their water with electricity and to NW Natural, Cascade Natural Gas or Avista customers who heat their water with natural gas. Final determination of eligibility shall rest solely with Energy Trust.

ELIGIBLE MEASURES: Measures 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, Customer's 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. For all measures except approved self-installation projects, measures must be installed by an Energy Trust trade ally contractor or any other licensed contractor with a current Oregon Construction Contractors Board (CCB) license.

PROOF OF PURCHASE: The invoice documentation accompanying this application must **itemize** the products purchased and/or work performed. This proof of purchase must show a description of any installation or other labor charges, and 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, shall be the same as delivery of the original signed document. Scanned original documents transmitted to Energy Trust as an attachment via electronic mail shall be 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 in promoting Existing Homes. 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 to access utility energy usage data relating to the property on which energy-saving measures have been completed and/or installed by accessing the electric and natural gas accounts at the physical address of the project. Customer agrees to provide other reasonable assistance to Energy Trust to obtain such information.

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 Legislature, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing & Community Services, and/or the Oregon Legislature. Energy Trust will treat all other information gathered as confidential and report it only in the aggregate.