

# Residential Water Heating Incentives, Contractor Install

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



## Steps to Completion

- 1. Review:** Customer and Contractor review customer, site, and equipment eligibility requirements.
  - ▶ Read all terms and conditions (*page 3*)
  - ▶ Application must meet all eligibility requirements.
- 2. Customer completes:** Customer Information and Site Information.
- 3. Contractor completes:** Equipment Information and paid in full invoice.
- 4. Sign:** Customer and Contractor sign form.
- 5. Submit:** application and documentation to

Energy Trust of Oregon – Residential  
1819 SW 5th Ave, #331  
Portland, OR 97201  
[residentialforms@energytrust.org](mailto:residentialforms@energytrust.org)

- Apply online at [www.energytrust.org/now](http://www.energytrust.org/now).
- This application must be **completed by the Customer and Contractor**.
- Customer, site, and equipment eligibility requirements:
  - Energy Trust specification manual  
[www.energytrust.org/specmanual](http://www.energytrust.org/specmanual)
  - Program Information Sheet  
[www.energytrust.org/PI320I](http://www.energytrust.org/PI320I)
- Energy Trust must **receive applications within 60 days from the date of installation**.
- Please allow **four to six weeks** for incentive processing after completed application and supporting documentation are received.

★ Indicates required field

## Customer Information (Completed by Customer)

★ 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).

★ Customer Name

★ Site Address

★ City

★ State

★ Zip

Mailing Address (if different than site address)

City

State

Zip

★ Telephone

★ Email

## Site Information (Completed by Customer)

Year built	Square feet	Foundation/ basement		
		<input type="checkbox"/> Garage/basement combo	<input type="checkbox"/> Crawlspace w/ vapor barrier	<input type="checkbox"/> Half basement
		<input type="checkbox"/> Crawlspace	<input type="checkbox"/> Full basement	<input type="checkbox"/> Slab on grade
Home type		*Washington state customers only		
<input type="checkbox"/> Single-family	<input type="checkbox"/> Manufactured	<input type="checkbox"/> Rowhouse*	<input type="checkbox"/> Townhouse*	<input type="checkbox"/> Duplex*
			<input type="checkbox"/> Triplex*	<input type="checkbox"/> Fourplex*
Primary heating system ( <b>check one</b> )				
<input type="checkbox"/> Electric furnace	<input type="checkbox"/> Ductless heat pump	<input type="checkbox"/> Wood	<input type="checkbox"/> Electric baseboard	<input type="checkbox"/> Gas furnace
<input type="checkbox"/> Propane	<input type="checkbox"/> Ducted heat pump	<input type="checkbox"/> Gas fireplace	<input type="checkbox"/> Other _____	

## Customer Name and Signature

By signing below, I have read, understand, and agree to the Terms and Conditions (*page 3*) of this application.

★ Customer signature



★ Full name (please print and use same name as on invoice)

★ Date

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## Contractor Name and Signature

By signing below, I have read, understand, and agree to the Terms and Conditions (page 5) of this application.

★ Contractor signature



★ Full name (please print)

★ Date

★ Contractor Company

OCCB# or Washington License # (Non-trade ally only)

★ Install date

## Instant Incentives (Completed by Contractor)

Are you an **Energy Trust trade ally** submitting this as an **Instant Incentive** project?

☐ Yes, instant incentive amount listed on invoice: \$

## Equipment Information

### Gas Tankless Water Heater Incentives (Completed by Contractor)

☐ Gas tankless water heater ..... \$400

#### Equipment Eligibility Requirements

- Unit must be ENERGY STAR® qualified at the time of purchase
- **Oregon only:** Unit must replace an existing gas storage tank water heater
- **Oregon only:** Unit must be installed in a home with an existing 1/2" or 3/4" gas line capable of serving the existing gas appliances in addition to the tankless water heater.

★ Manufacturer:

★ Model:

UEF:

★ Was the residence's gas line upgraded to accommodate the installation of the tankless water heater? ☐ Yes ☐ No

★ What was the size of the residence's original gas line? ☐ NA ☐ 1/2" ☐ 3/4" ☐ Other

★ What is this unit replacing?

☐ Gas Storage Tank ☐ Gas Tankless ☐ Electric Storage Tank ☐ Other:

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## 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 of Oregon, Inc. ("Energy Trust") will not be responsible for lost documentation pertaining to this application request. Energy Trust **must receive applications within 60 days after the date of installation.**

**ELIGIBILITY:** Incentives are available to eligible Customers who are: (i) Oregon residential natural gas service customers of NW Natural, Cascade Natural Gas, or Avista, or (ii) Washington residential natural gas service customers of NW Natural. Final determination of eligibility rests solely with Energy Trust.

**ELIGIBLE PRODUCTS:** Products must meet Energy Trust energy efficiency specifications. These specifications may be found 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 upgrades meet Energy Trust 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:** 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, and (iii) timely submission of all required documentation. Incentives will be paid directly to Customer unless submitted as an instant incentive project; instant incentive projects will be paid to the contractor. All upgrades must be installed by an Energy Trust trade ally contractor or any other Oregon or Washington licensed 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 cost of upgrade and installation. 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. Incentives offers are subject to funding availability and may change. **Incentive amounts are valid for installations completed no later than December 31, 2025.** 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 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 as 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 the 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 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 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 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. **Customer assumes the risk of any loss or damage(s) that Customer may suffer in connection with installation and use of the products/upgrades. Energy Trust does not guarantee any particular energy savings 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 the 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 *(Completed by customer)*

### 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.**

### Do you (or someone in your household) rent or own your home?

- ☐ Own
- ☐ Rent
- ☐ Live there but don't pay rent
- ☐ Prefer to self-describe \_\_\_\_\_
- ☐ Prefer not to answer

### 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 Indian
- ☐ Native Hawaiian or other Pacific Islander
- ☐ White
- ☐ Some other race: \_\_\_\_\_
- ☐ Prefer not to answer

### What best describes your gender?

- ☐ Female
- ☐ Male
- ☐ Non-binary/third gender
- ☐ Prefer to self-describe \_\_\_\_\_
- ☐ Prefer not to answer

### Which of the following ranges describes your total household income for the previous year before taxes?\*

- ☐ Less than \$25,000
- ☐ \$25,000 - \$34,999
- ☐ \$35,000 - \$49,999
- ☐ \$50,000 - \$74,999
- ☐ \$75,000 - \$99,999
- ☐ \$100,000 - \$149,999
- ☐ \$150,000 - \$199,999
- ☐ \$200,000 or more
- ☐ Don't know
- ☐ Prefer not to answer

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

- ☐ Chinese
- ☐ English
- ☐ French
- ☐ German
- ☐ Hindi
- ☐ Japanese
- ☐ Korean
- ☐ Russian
- ☐ Spanish
- ☐ Tagalog
- ☐ Vietnamese
- ☐ Another language \_\_\_\_\_
- ☐ Prefer not to answer

### How many full-time residents live in your home?\*

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8
- ☐ 8+

### How long have you lived in your current home?

- ☐ Less than a year
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ More than 10 years
- ☐ Don't know
- ☐ Prefer not to answer

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