

Residential Heating and Cooling Incentives, Contractor Install

Residential | Incentive Application | Form 320_{C-HVAC}



Steps to Completion

- 1. Review:** Customer and Contractor review customer, site, and equipment eligibility requirements.
 - ▶ **Read all terms and conditions (page 6)**
 - ▶ **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
- **Apply online** at 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
 - Program Information Sheet
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.

★ **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	<input type="checkbox"/> Crawlspace w/ vapor barrier <input type="checkbox"/> Full basement	<input type="checkbox"/> Half basement <input type="checkbox"/> Slab on grade
Water heating fuel <input type="checkbox"/> Electricity <input type="checkbox"/> Natural gas <input type="checkbox"/> Propane				
Home type <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*				

*Washington state customers only

Customer Name and Signature

By signing below, I have read, understand, and agree to the Terms and Conditions (page 6) 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

Ductless Heat Pump (Completed by Contractor)

☐ Ductless Heat Pump \$800 per outdoor unit

☐ Ductless Heat Pump installed in a detached single-family rental \$1,800 per outdoor unit

Equipment Eligibility Requirements

- Unit must have HSPF2 of 8.10 or greater and replace electric resistance heat.
- Primary indoor unit must be installed in the main living space (e.g. living room, great).

★ What type of heating system did this replace?

☐ Electric furnace

☐ Electric radiant heat

☐ Electric wall heat

☐ Electric baseboard

☐ Other:

Outdoor Unit

★ Manufacturer:

★ Model Number:

Qty of outdoor units:

Total capacity (BTUs):

HSPF2:

Indoor Unit

★ Manufacturer:

★ Model Number:

Qty of indoor units:

Primary Living Space Room Type:

Did this project include ceiling cassettes or a concealed air handler serving a slim/short duct run? ☐ Yes ☐ No

Did the installation add heating to any previously unconditioned rooms? (multi-zone projects only) ☐ Yes ☐ No

Secondary Heat Source

Is there an alternate, non-electric heating source being used to heat the primary living space? If so, what is it?*

☐ Oil heater

☐ Propane heater

☐ Gas stove

☐ Wood stove

☐ Pellet stove

☐ Gas fireplace

☐ No secondary heating system present

☐ Other:

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Ducted Heat Pump Incentives *(Completed by Contractor)*

- ☐ Ducted heat pump in a detached single-family home\$1,000
- ☐ Ducted heat pump in a detached single-family rental\$3,000

Equipment Eligibility Requirements

- Unit must have HSPF2 of 7.50 or greater and replace electric forced air furnace.
- Heat pump cannot have a backup gas heating system.

★ What type of heating system did this replace?

- ☐ Electric furnace
- ☐ Other:

Is an AHRI certificate attached to this application?

- ☐ Yes
- ☐ If no, provide information below:

★ Manufacturer:

★ Model:

HSPF2:

Ducted Heat Pump Controls Incentives *(Completed by Contractor)*

- ☐ Heat pump controls..... \$250

Equipment Eligibility Requirements

- Thermostat lockout must be set to 35°F or lower if electric furnace auxiliary heat is present
- Cannot be combined with other heat pump controls or smart thermostat incentives.
- Qualified Product List www.energytrust.org/wp-content/uploads/2016/09/HPAC_QPL.pdf

Installed Cost \$:

Lockout temperature:

° F

Manufacturer:

Model Name:

Model #:

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Extended Capacity Ducted Heat Pump Incentive (Completed by Contractor)

- ☐ Extended capacity heat pump \$1,000
- ☐ Extended capacity heat pump Installed in a Rental Property \$2,000
- ☐ Extended capacity heat pump replacing electric forced air furnace as primary heat source \$3,000

Equipment Eligibility Requirements

- Unit must have a central ducted system with traditional air handler (slim duct types do not qualify) serving the primary living space of the home.
- Controls must be set with an auxiliary heat lockout setting when available.
- Heat pump cannot have backup gas heating system..
- Qualified Product List www.energytrust.org/wp-content/uploads/2020/05/ECHP-QPL.pdf

Heating system replaced (check one)

- ☐ Electric furnace ☐ Electric baseboard ☐ Gas furnace ☐ Gas fireplace ☐ Hydronic (boiler)
- ☐ Propane heat ☐ Heat pump ☐ Wood heat ☐ N /A ☐ Other:

Select any secondary heat sources the home has:

- ☐ Gas fireplace ☐ Electric furnace ☐ Hydronic (boiler) ☐ Gas furnace ☐ Electric baseboard
- ☐ Wood heat ☐ Other:

Prior to install, did the home have central air conditioning?

☐ Yes ☐ No ☐ Other:

Was there electric auxiliary heat installed? Or no back-up?

☐ Yes ☐ No ☐ Other:

AHRI Certificate Number:

Installed Cost \$

Manufacturer:

Model:

HSPF2:

EER2:

SEER2:

Serial #:

Indoor Model:

Thermostat

Compressor control set: °F

Auxiliary heat lockout set: °F

Manufacturer:

Model Name:

Model #:

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Smart Thermostat Incentives (Completed by Contractor)

- ☐ Smart thermostat in a detached single family home\$250
- ☐ Smart thermostat in a multi-family home (Washington only).....\$100

Equipment Eligibility Requirements

- Residence must be primarily heated by an electric forced-air furnace, gas forced-air furnace, or ducted heat pump.
- Qualified Product List www.energytrust.org/wp-content/uploads/2016/08/Smart-thermostats-QPL.pdf

Primary Heating system (check one)

- ☐ Electric furnace ☐ Electric baseboard ☐ Ducted heat pump ☐ Ductless heat pump ☐ Gas furnace
- ☐ Gas fireplace ☐ Propane heat ☐ Wood heat ☐ N / A ☐ Other:

Installed Cost \$:

Manufacturer:

Model Name:

Model #:

Gas Fireplace Incentives (Completed by Contractor)

- ☐ Gas fireplace (FE 75%+).....\$250
- ☐ Gas fireplace (FE 70% - 74.9%).....\$150

Primary heating system (check one)

- ☐ Electric furnace ☐ Electric baseboard ☐ Ducted heat pump ☐ Ductless heat pump ☐ Gas furnace
- ☐ Gas fireplace ☐ Propane heat ☐ Wood heat ☐ Other:

FE: %

★ Model:

Serial #*:

*required if multiple fireplaces installed

Gas Furnace Incentives (Completed by Contractor)

- ☐ Gas furnace installed in a detached single-family rental home (Oregon only).....\$1,600
- ☐ Gas furnace installed in a rental home (Washington only)\$1,600
- ☐ Gas furnace installed in an owner-occupied home (Washington only).....\$800

What type of heating system did this replace?

- ☐ Gas furnace ☐ Electric furnace ☐ Oil heater ☐ Wood ☐ Other:

ECM? ☐ Yes ☐ No

AFUE: %

★ Manufacturer:

★ Model:

Serial #:

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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 of Oregon, Inc. ("Energy Trust") under this program. 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.

CUSTOMER AUTHORIZATION: The person signing this application on behalf of Customer certifies that they are authorized to do so. By signing above, Customer authorizes Contractor identified above to submit this application and all documentation to Energy Trust on Customer's behalf. Customer represents to Energy Trust that all upgrades have been completed by Contractor as of the signature date above and all documentation is complete and accurate. If Customer is a landlord or property manager, Customer affirms that they own and do not reside at the property. If this is an Energy Trust instant incentive project, Customer understands and agrees that Energy Trust will issue a check for incentives that meet Energy Trust requirements to the Contractor, and Customer is responsible for paying the remaining balance.

CONTRACTOR AUTHORIZATION: The person signing this application on behalf of Contractor certifies that they are authorized to do so. By signing above, Contractor certifies that this application and all documentation are complete and accurate, and all associated upgrades were completed as of the signature date above. Incentives are payable to the Customer unless this is an instant incentive project, in which case incentives are paid directly to the Contractor. If this is an Energy Trust instant incentive project, Contractor (i) must have itemized the instant incentive deductions on Customer's invoice, and (ii) must have an active **Form 372IN:**

Participation Agreement – Instant Incentives on file with Energy Trust and agrees to adhere to its terms and conditions. All work must comply with the **Residential Specification Manual** at www.energytrust.org/specmanual and all other Energy Trust requirements.

ELIGIBILITY: Incentives are available to eligible Customers who are: (i) Oregon residential electric service customers of Portland General Electric (PGE) or Pacific Power, (ii) Oregon residential natural gas service customers of NW Natural, Cascade Natural Gas or Avista, or (iii) Washington residential natural gas service customers of NW Natural. Incentives for upgrades 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 and Avista customers who heat their homes with natural gas. Final determination of eligibility shall rest solely with Energy Trust. All upgrades must be installed by an Energy Trust trade ally contractor or any other Oregon or Washington licensed contractor.

ELIGIBLE PRODUCTS: Products must meet Energy Trust energy efficiency specifications. These specifications can be found at www.energytrust.org/PI320I 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 upgrades meet Energy Trust 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: 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 this is an instant incentive project. Instant incentive projects will be paid to the 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. 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/PI320I. Contact Energy Trust with any questions.

TAX LIABILITY: Energy Trust is not responsible for any tax liability imposed on the Customer that may result from any incentive payments or 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 upgrades on the property on which those upgrades are completed and/or installed and that any necessary consent has been obtained.

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ACCESS AND EVALUATION: Energy Trust and/or its representatives may request access to the property on which 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, and obtain all necessary consent, for the purposes described in this application.

DISCLAIMER/NO LIABILITY: Customer understands that, although Energy Trust may provide Customer with an incentive payment, Energy Trust and its representatives are not supervising work performed for Customer and are not 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 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 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 and its authorized contractors 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