

# Residential Customer Consent and Authorization Form

Residential | Customer Consent Form | Form 350cc



To be completed by Customer and Contractor

## Customer Name and Signature

By signing below, Customer agrees to the terms and conditions of this application and authorizes Contractor 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 upgrades have been completed satisfactorily by Contractor as of the signature date below and all accompanying documentation is complete and accurate. If Customer identifies as landlord or property owner applying for a single-family rental property incentive, Customer acknowledges they own and do not reside in the property. **If identified as an Energy Trust instant incentive, Savings Within Reach, Manufactured Home No-Cost Service or Direct Install project, 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 (application status updates are sent via email)

Site Address

Mailing Address (if different than site)

## Contractor Name and Signature

By signing below, Contractor 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. Contractor certifies that the homeowner meets incentive eligibility and work done qualifies for an Energy Trust of Oregon incentive. Incentives are payable to Customers only unless part of an instant incentive project. **If identified as an instant incentive project, Contractor has shown instant incentive amount listed below as itemized discount(s) from Customer's invoice and agrees to the terms and conditions set forth in Form 372IN: Participation Agreement – Instant Incentives.** To receive incentives, all work must comply with the [Residential Specifications Manual](#).



Contractor signature

Full name (please print)

Date

Contractor company

OCCB# or Washington License #

Install date

☐ Project meets Home Performance with ENERGY STAR requirements. BPI technician (print name):

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

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

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## Terms and Conditions

**AUTHORIZATION:** This authorization form must be filled out completely, truthfully and accurately. Customers may wish to retain a copy of this authorization and any accompanying documentation submitted to Energy Trust. Energy Trust will not be responsible for lost documentation pertaining to this application request.

**Energy Trust must receive this completed authorization prior to processing or paying any incentives..**

**ELIGIBILITY:** Incentives for home heating upgrades are available to Customers that heat their homes with (i) electricity provided by Portland General Electric or Pacific Power or (ii) natural gas provided by NW Natural, Cascade Natural Gas or Avista. Incentives for water heating upgrades are available to Customers that heat their water with (iii) electricity provided by PGE or Pacific Power or (iv) natural gas provided by NW Natural, Cascade Natural Gas or Avista. Incentives for Savings Within Reach-eligible upgrades are available to Oregon Customers who qualify under the **Form 310SWR: Verification of Income Qualification** and meet the criteria described in (i), (ii), (iii) and/or (iv) above. All upgrades must be installed by an Energy Trust trade ally contractor or any other licensed contractor with a current Oregon Construction Contractors Board (CCB) license or Washington contractor's license. Savings Within Reach-eligible measures must be installed by an active Savings Within Reach trade ally. Final determination of eligibility shall rest solely with Energy Trust.

**CUSTOMER:** The person signing this form is the Customer. By signing this form, Customer certifies that they are eligible for Energy Trust services and incentives.

**PROPERTY RIGHTS:** Customer represents that Customer has the right to authorize the installation of the energy-saving upgrades on the property on which those upgrades are completed and/or installed and that any necessary consent (e.g., landlord, tenants) will be obtained.

**ACCESS AND EVALUATION:** Energy Trust and/or its representatives may request access to the property and may review and evaluate the property during and after completion. Customer agrees to provide reasonable access to the property, and obtain all necessary consent(s), for the purposes described herein.

**INFORMATION RELEASE:** Customer agrees that Energy Trust may include Customer's name, Energy Trust services and resulting energy savings in reports or other documentation or information submitted to Energy Trust, the Oregon legislature, its Board of Directors, 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, unless a specific disclosure is required by applicable law or governmental or court order.

**WORK QUALITY AND INCOME VERIFICATION:** Prior to any work beginning for Savings Within Reach-eligible projects, Participating Contractor will verify Customer's income eligibility by completing the **Form 310SWR: Verification of Income Qualification**. Prior to any payment of incentives, Participating Contractor will verify that the installed energy-saving upgrades meet program requirements and Energy Trust of Oregon weatherization specification standards. 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.

**MINIMUM VENTILATION:** Customer may be notified by Contractor that the home's mechanical ventilation is at or below standards specified by [Home Retrofit Specification Manual](#). Mechanical ventilation may require improvement before work can be completed.

**PAYMENT:** Subject to 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 of upgrades. Incentives will be paid directly to Customer. Savings Within Reach-eligible upgrades will be paid to Contractor; Contractor will reduce overall billing to Customers by applicable incentive amounts and adhere to the criteria laid out in (i), (ii) and (iii). **Please allow 4-6 weeks for incentive processing.** Failure to deliver all required information may result in a delay or withholding of payment.

**INCENTIVE AMOUNT:** Incentive amount cannot exceed total installed cost. Incentives for energy-saving upgrades completed and/or installed through Energy Trust programs are limited to the amounts provided by Energy Trust. Incentive offers and amounts are subject to funding availability and may change. 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 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.

**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.

**ENERGY INFORMATION RELEASE:** Customer authorizes Energy Trust to access energy usage data relating to the property on which energy-saving upgrades 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.

**DISCLAIMER / NO LIABILITY:** Customer understands that, although Energy Trust may provide 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 upgrades. Customer assumes the risk of any loss or damage(s) that Customer may suffer in connection with installation of the upgrades. Energy Trust does not guarantee any particular energy-savings results by its approval of the application or by any other actions.