

**Form 320ADS
Incentive Application—Air Sealing and Duct Sealing
Existing Homes**



To be completed by Participant and Trade Ally Contractor or other Contractor

Conservation Services Group (CSG) is a Program Management Contractor for Energy Trust of Oregon

Program Use Only

FastTrack ID	Project Type
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Please read this form carefully and provide all specified information.

The Existing Homes program must receive applications within 90 days from the date of installation. All information must be completed for processing; incomplete information will result in delayed payment of the incentive. Incentive offers are subject to funding availability and may change.

How did you hear about Energy Trust? (select one)			From whom did you hear about Energy Trust? (select one)		
<input type="checkbox"/> Email	<input type="checkbox"/> Web/Online	<input type="checkbox"/> Other	<input type="checkbox"/> Contractor	<input type="checkbox"/> NW Natural	<input type="checkbox"/> Real Estate Agent
<input type="checkbox"/> Event	<input type="checkbox"/> Utility Bill	<input type="checkbox"/> Don't Know	<input type="checkbox"/> Energy Trust	<input type="checkbox"/> Cascade Natural Gas	<input type="checkbox"/> Other
<input type="checkbox"/> Mail	<input type="checkbox"/> Referral		<input type="checkbox"/> PGE	<input type="checkbox"/> Friend/Family	<input type="checkbox"/> Don't Know
<input type="checkbox"/> News	<input type="checkbox"/> Advertisement		<input type="checkbox"/> Pacific Power		
If Other:			If Real Estate Agent, please specify name:		

Participant Information (All information is required to process incentive for payment.)

Participant Name		Install Date	
Site Address		City	State OR Zip
Mailing Address (for payment)		City	State Zip
Telephone <input type="checkbox"/> Home <input type="checkbox"/> Cell <input type="checkbox"/> Office		Alt. Telephone <input type="checkbox"/> Home <input type="checkbox"/> Cell <input type="checkbox"/> Office	
Email		County	
Participant Type <input type="checkbox"/> Homeowner <input type="checkbox"/> Property Owner or Manager		Occupancy <input type="checkbox"/> Owner <input type="checkbox"/> Tenant	
Is this property used for rental income? <input type="checkbox"/> Yes <input type="checkbox"/> No		If you checked Yes , a W-9 is required for payment. Please call 1.866.311.1822 for more information	
		Mobile home ¹ ? <input type="checkbox"/> Yes <input type="checkbox"/> No	

Utility Information (please check the box for your service utility)

Electric	<input type="checkbox"/> Portland General Electric	<input type="checkbox"/> Pacific Power	<input type="checkbox"/> Other Electric Utility (specify)
Gas	<input type="checkbox"/> NW Natural	<input type="checkbox"/> Cascade Natural Gas	<input type="checkbox"/> Other Gas Utility (specify)

Participant and Contractor Signatures are required on page 6 of this form.

¹ Energy Trust defines a mobile home as any home designed for highway transport and situated on a non-permanent foundation. If on a non-permanent foundation, home must go through the no-cost air and duct sealing program offered by Energy Trust and does not qualify for cash incentives for air or duct sealing. For more information on the no-cost existing mobile homes program, contact 1.866.311.1822.

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Site Information

Year Built _____		Square Feet _____		Number of Levels _____	
Primary Heating System	<input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Propane <input type="checkbox"/> Other _____	<input type="checkbox"/> Baseboard <input type="checkbox"/> Furnace <input type="checkbox"/> Heat Pump <input type="checkbox"/> Space Heater <input type="checkbox"/> Other _____	Is furnace being upgraded at this time? <input type="checkbox"/> Yes <input type="checkbox"/> No Has furnace been upgraded within the last year? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Ducted Forced Air System		<input type="checkbox"/> Yes <input type="checkbox"/> No	Cooling	<input type="checkbox"/> Central A/C <input type="checkbox"/> Room A/C	<input type="checkbox"/> Heat Pump <input type="checkbox"/> None
Water Heater Fuel	<input type="checkbox"/> Electric <input type="checkbox"/> Propane <input type="checkbox"/> Gas <input type="checkbox"/> Other _____	Water Heater Capacity _____ Gallons		<input type="checkbox"/> Tankless	
Basement		<input type="checkbox"/> Crawlspace unimproved <input type="checkbox"/> Crawlspace with vapor barrier	<input type="checkbox"/> Full basement <input type="checkbox"/> Garage/ basement combo	<input type="checkbox"/> Half basement <input type="checkbox"/> Slab on grade	<input type="checkbox"/> None <input type="checkbox"/> Other

Air Leakage Test²:
 Blower Door test required; \$35 per building tested

Pre CFM ₅₀ _____	Pre-VP: _____	Test Cost \$ _____
If test in only, identify reasons: <input type="checkbox"/> Air leakage pre-test determined that the MVL prohibited air sealing <input type="checkbox"/> Participant declined air sealing <input type="checkbox"/> Contractor made a reasonable effort to seal the house, but was unable to meet the minimum reduction standards <input type="checkbox"/> Other: _____		

Minimum Ventilation Level Measurement <i>(required before performing air sealing on all homes)</i>		Ventilation Potential = CFM₅₀ / N If MVL is greater than Ventilation Potential, Mechanical Ventilation is required.	
<input type="checkbox"/> MVL based on known occupancy _____ occupants x 15 CFM = _____	<input type="checkbox"/> MVL based on number of bedrooms (_____ bedrooms + 1) x 15 CFM = _____	<input type="checkbox"/> MVL based on ACH _{nat} and volume (.35 ACH _{nat} x _____ volume) / 60 = _____	
Blower Door Location _____		Blower Door Make _____	
Ventilation System <i>*if approved mechanical ventilation strategy exists, MVL threshold may be waived</i> NOTE: incentives will not be paid on a project when the MVL is greater than ventilation potential, unless an approved mechanical ventilation strategy exists.		<input type="checkbox"/> Continuous rated fan with programmable timer <input type="checkbox"/> Mechanical damper with 24 hr timer <input type="checkbox"/> Other	

² Air testing and sealing work must be performed by a qualified trade ally contractor of Energy Trust of Oregon with performance testing certification.

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Air Sealing³:

Blower Door test required; 50% of cost, up to \$400 per electrically heated residence; 50% of cost, up to \$275 per gas heated residence. Minimum 300 CFM₅₀ reduction required. If final measurement is below MVL, mechanical ventilation is required.

Pre CFM ₅₀ _____	Pre-VP: _____	Sealing Cost \$
Post CFM ₅₀ _____	Post-VP: _____	
Leakage Reduction _____	Mechanically Ventilated <input type="checkbox"/> Yes <input type="checkbox"/> No	

Air Sealing Target Areas

Check area(s) where air sealing was performed

- | | | | | |
|----------------------------|---|--|---------------------------------------|---|
| Attic: | <input type="checkbox"/> Chases | <input type="checkbox"/> Chimney/Flue | <input type="checkbox"/> Access Doors | <input type="checkbox"/> Top Plates |
| Knee Walls: | <input type="checkbox"/> Joist Cavities | <input type="checkbox"/> Built-ins | <input type="checkbox"/> Access Doors | <input type="checkbox"/> Hatches |
| Band Joist: | <input type="checkbox"/> Between Floors | <input type="checkbox"/> Plumbing | <input type="checkbox"/> Basement | <input type="checkbox"/> Electrical |
| Exterior Walls: | <input type="checkbox"/> Chimney | <input type="checkbox"/> Penetrations | <input type="checkbox"/> Baseboards | <input type="checkbox"/> Sill Plates |
| Under Floors/Crawl: | <input type="checkbox"/> Chases | <input type="checkbox"/> Plumbing | <input type="checkbox"/> Access Doors | <input type="checkbox"/> Electrical |
| Windows and Doors: | <input type="checkbox"/> Window trim | <input type="checkbox"/> Weather stripping | <input type="checkbox"/> Door Sweeps | <input type="checkbox"/> Basement Windows |

Please list other area(s), if applicable: _____

Duct Leakage Test:

Duct test required; \$35 per duct system tested; work must be installed by PTCS certified technician. PTCS form must be attached.

Pre CFM ₅₀ _____	Test Cost \$
If test in only, identify reasons: <input type="checkbox"/> Participant declined duct sealing <input type="checkbox"/> Duct Leakage pre-test was less than 300 CFM ₅₀ <input type="checkbox"/> Contractor made a reasonable effort to perform duct sealing, but was unable to meet the reduction requirements; 150 CFM ₅₀ minimum reduction and 50% reduction, or greater <input type="checkbox"/> No test conducted, visual inspection verified ducts are inside conditioned space <input type="checkbox"/> Other: _____	

Duct Sealing:

Duct test required; 50% of cost, up to \$400 per electrically heated residence; 50% of cost, up to \$325 per gas heated residence; **must have minimum 150 CFM₅₀ reduction and** work must comply with PTCS specifications: (1) meet a minimum 50% reduction **or** (2) final CFM₅₀ must be less than 10% of conditioned floor space. PTCS form must be attached.

Pre CFM ₅₀ _____	Sealing Cost \$	
Post CFM ₅₀ _____		
Leakage Reduction _____		
Is this installation being submitted for an Oregon State Energy Tax Credit ⁴ ?		<input type="checkbox"/> Yes <input type="checkbox"/> No

³ Air testing and sealing work must be performed by a qualified trade ally contractor of Energy Trust of Oregon with performance testing certification.

⁴ If yes, please include the tax credit application with contractor/technician sections completed.

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Checklist for Incentive(s):

- Complete and return this entire form.
- Contractor and homeowner signatures are on terms and conditions page.
- Tax credit application with completed contractor section, if applicable.
- Date of installation (all applications must be received within 90 days of installation date).
- Invoice billing homeowner is attached and marked "paid in full".
- Performance Testing Comfort Systems (PTCS™) Duct Sealing Certificate and NW Duct Sealing Form attached (required for duct testing and duct sealing).

Terms and Conditions

APPLICATION: This application and any required additional documentation, including Data Sheets, must be filled out completely, truthfully and accurately. Participants 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. **The Existing Homes program must receive applications within 90 days after the date of installation.** Incentive offers are subject to funding availability and may change. **Incentive amounts are valid through August 31, 2012. Please allow 6-8 weeks for incentive processing.**

ELIGIBILITY: Incentives are available to approved participants who are: (i) Oregon residential electric service customers of Portland General Electric (PGE) or Pacific Power, and/or (ii) Oregon residential natural gas service customers of NW Natural or Cascade Natural Gas. 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 or Cascade Natural Gas customers who heat their homes with natural gas. Final determination of eligibility shall rest solely with Energy Trust.

WORK QUALITY VERIFICATION: Prior to any payment of incentives, participant's contractor will verify that the installed energy-saving measures meet program requirements and Energy Trust of Oregon weatherization specification standards. Outdoor temperatures may affect this verification process. Participant'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 Participant unless Participant has elected to obtain financing for the cost of installing the energy-saving measures identified in the documentation accompanying this application. 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 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: (1) the date of purchase and itemized price paid, (2) the size, type, make, model or part number for the products, (3) a description of any installation or other labor charges, and (4) the invoice is paid in full.

INCENTIVE AMOUNT: 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 Participant 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, Participant shall confirm documents with a facsimile transmitted signature or a scanned signature by providing the original document.

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SAFETY AND BUILDING CODES: Participant 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: Participant represents that Participant 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 savings measures have been completed and/or installed and may review and evaluate the project during and after completion. Participant agrees to provide reasonable access to the property for the purposes described herein.

ENERGY INFORMATION RELEASE: Participant authorizes Energy Trust to access 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. Participant agrees to provide other reasonable assistance to Energy Trust to obtain such information.

INFORMATION RELEASE: Participant agrees that Energy Trust may include Participant's name, Energy Trust services and resulting energy savings in reports or other documentation submitted to the Energy Trust 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 in evaluations as confidential and report it only in the aggregate.

ELIGIBLE PRODUCTS: Products 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.

DISCLAIMER / NO LIABILITY: Participant understands that, while Energy Trust may provide Participant with an incentive payment, Energy Trust is not supervising work performed for Participant 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 Participant in implementing energy saving measures. Participant assumes the risk of any loss or damage(s) that Participant may suffer in connection with installation of the measures. Energy Trust does not guarantee any particular energy-savings results by its approval of the application or by any other of its actions.

Bonus packages for homeowners installing multiple qualifying improvements*

Please check the box to identify any bonus incentives

<input type="checkbox"/>	\$100 Windows Bonus (Windows + second qualifying upgrade)
<input type="checkbox"/>	\$400 Solar Bonus Package** (Solar project + two qualifying energy efficiency upgrades)
<input type="checkbox"/>	\$150 Home Comfort Package** (Attic, Floor, Wall Insulation and Air Sealing)
<input type="checkbox"/>	\$300 Heat Pump Commissioning Bonus** (Qualifying Heat Pump, Duct Sealing and Check Me!/PTCS commissioning)

*For more information or a list of qualifying upgrades, please visit <http://www.energytrust.org/bonuspackage>

**Must be installed by an Energy Trust trade ally contractor.

Incentive Information

Total incentive requested	\$
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Would you like a complimentary work quality verification to confirm work was completed to Energy Trust standards? Work quality verification is dependent on available program resources.

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Participant Signature (All information is required to process incentive for payment.)

By signing below, Participant agrees to the terms and conditions of this application and authorizes Contractor to submit this application and all required invoices or measure documentation to Energy Trust on Participant's behalf for all Energy Trust incentives that are available for the energy saving measures that Contractor has completed for Participant. By that authorization, Participant represents to Energy Trust that all measures have been completed satisfactorily as of the signature date below, and that any accompanying invoices or measure documentation are complete and accurate.

Participant Name <i>(please print)</i>	Signature	Date
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Contractor Signature (All information is required to process incentive for payment.)

By signing below, Trade Ally/Contractor certifies that this application and any accompanying invoices or measure documentation are complete and accurate, and that all measures associated with this incentive request were completed as of the signature date below. Incentives are payable to Participants only.

Trade Ally/Contractor Company	Install Date
Trade Ally/ Contractor Representative <i>(please print)</i>	Signature
Telephone <input type="checkbox"/> Home <input type="checkbox"/> Cell <input type="checkbox"/> Office	Alt. Telephone <input type="checkbox"/> Home <input type="checkbox"/> Cell <input type="checkbox"/> Office
Non-Trade Ally only: OCCB#	Date

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