

**Form 320H
Incentive Application—HVAC and DHW
Existing Homes**



To be completed by Participant and Trade Ally

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

Program Use Only

| | |
|--------------|--------------|
| FastTrack ID | Project Type |
|--------------|--------------|

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 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 | | Year Began Occupying Home | |
| 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. | |
| Year Built | Square Feet | Number of Levels | Current Primary Heating System |
| Previous Heating System | <input type="checkbox"/> Electric Baseboard | <input type="checkbox"/> Electric Furnace | <input type="checkbox"/> Gas Furnace |
| | | <input type="checkbox"/> Gas Fireplace | <input type="checkbox"/> Heat Pump |
| | | | <input type="checkbox"/> Hydronic |
| | | | <input type="checkbox"/> Wood |
| | | | <input type="checkbox"/> N/A |
| | | | <input type="checkbox"/> Other |
| Furnace Details: | <input type="checkbox"/> Furnace is being upgraded at this time | | <input type="checkbox"/> Furnace has been upgraded within the last year |
| | | | <input type="checkbox"/> Furnace not recently upgraded |
| Water Heating Fuel | <input type="checkbox"/> Electric | <input type="checkbox"/> Gas | <input type="checkbox"/> Other (specify) |
| 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 |

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) |

Ducted Heat Pump Incentives (please check the box for each upgrade you are applying for)

| Upgrade Type | Energy Requirements | Incentive Amount |
|--|-----------------------------|-------------------------------|
| <input type="checkbox"/> Ducted Heat Pump upgrade from electric furnace, baseboard, wall heater or ceiling heat. | Minimum HSPF 9.0 [any size] | \$450 |
| <input type="checkbox"/> Ducted Heat Pump upgrade or replacement of non-electric heat (example: propane, wood or oil). | Minimum HSPF 9.0 [any size] | \$250 |
| Manufacturer | Model # | Serial # |
| | | HSPF SEER EER |
| Primary Heating System <input type="checkbox"/> Yes <input type="checkbox"/> No | Unit Size | Installed Cost |
| | | CheckMe! Cost (if applicable) |
| | | Incentive Requested |

Measures and incentives subject to change after December 31, 2012. Energy Trust welcomes contractors to join our Trade Ally Network.

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Heating Incentives (please check the box for each upgrade you are applying for)

| Upgrade Type | Energy Requirements | Incentive Amount |
|--|---|------------------------------------|
| <input type="checkbox"/> Gas Unit Heater | Minimum 80% AFUE | \$100 |
| <input type="checkbox"/> Gas Boiler | Minimum 88% AFUE | \$200 |
| <input type="checkbox"/> Gas Fireplace* | Minimum FE .65 | \$200 |
| <input type="checkbox"/> Gas Fireplace* | Minimum FE .70 | \$250 |
| Manufacturer | Model # | Efficiency (%AFUE or FE) % |
| Serial # | Primary Heating System <input type="checkbox"/> Yes <input type="checkbox"/> No | Installed Cost Incentive Requested |

*Gas fireplaces must have intermittent pilot ignition to qualify. For a list of qualifying units, visit http://energytrust.org/library/forms/HES_LT_Qualified_GasFireplaces.pdf

Water Heater Incentives (please check the box for each upgrade you are applying for)

| Upgrade Type | Energy Requirements | Incentive Amount |
|---|--|-------------------------------|
| <input type="checkbox"/> Electric Water Heater (If installed by homeowner, please use form 320S) | Energy Factor of 0.93 or greater; heat pump water heaters are not eligible for this incentive. | \$35 |
| <input type="checkbox"/> Electric Water Heater (If installed by homeowner, please use form 320S) | Energy Factor of 0.94 or greater and a 20 year manufacturer's tank warranty or greater; heat pump water heaters are not eligible for this incentive. | \$75 |
| <input type="checkbox"/> High-Efficiency Gas Tank Water Heater (Must be installed by a CCB licensed contractor) | Energy Factor of 0.67 or greater and ENERGY STAR approved. Hybrid water heaters and tankless water heaters do not qualify. | \$150 |
| Manufacturer | Model # | Serial # |
| Energy Factor | Installed Cost | Water Heater Capacity Gallons |
| Water Heating Fuel* <input type="checkbox"/> Electricity <input type="checkbox"/> Natural gas | Previous Water Heating Fuel* <input type="checkbox"/> Electricity <input type="checkbox"/> Natural gas <input type="checkbox"/> Propane | |
| Venting** <input type="checkbox"/> Atmospheric <input type="checkbox"/> Direct Vent <input type="checkbox"/> Power Vent | | Incentive Requested |

* Water Heating fuel type must be from one of the following utility providers in order to qualify for this incentive: PGE, Pacific Power, NW Natural, or Cascade Natural Gas

**For gas units only

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.

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Ducted Heat Pump Required Attachment:

CheckMe! heat pump optimization data sheet (if applicable)

Checklist for Incentive(s)

- Complete and return this entire form.
- Contractor and homeowner signatures are on terms and conditions page.
- Date of installation (all applications must be received within 90 days of initial measure installation.)
- Invoice billing homeowner marked "Paid in Full."

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-saving results by its approval of the application or by any other of its actions.

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. **Existing Homes program must receive applications within 90 days after the date of installation.** Incentives offers are subject to funding availability and may change. **Incentive amounts are valid through December 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 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: (i) the date of purchase and itemized price paid, (ii) the size, type, make, model or part number for the products, (iii) a description of any installation or other labor charges, and (iv) 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-saving 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.

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 Trade Ally/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 | Signature | Date |
|------------------|-----------|------|

Trade Ally/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 | Signature | Date |
| 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# | | |

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