

**Form 320H  
Incentive Application—HVAC and DHW  
Home Energy Solutions—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
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Home Energy Solutions 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. To request an extension please visit [www.energytrust.org](http://www.energytrust.org) or contact Energy Trust at 1.866.311.1822. Incentive offers are subject to funding availability and may change.

<b>How did you hear about Home Energy Solutions?</b>					
<input type="checkbox"/> Cascade Natural Gas	<input type="checkbox"/> NW Natural	<input type="checkbox"/> Real Estate Professional	<input type="checkbox"/> Bill Insert	<input type="checkbox"/> Letter or Mail	<input type="checkbox"/> Radio
<input type="checkbox"/> Contractor	<input type="checkbox"/> Pacific Power	Trade Ally	<input type="checkbox"/> Door Hanger	<input type="checkbox"/> Magazine	<input type="checkbox"/> Sales Call
<input type="checkbox"/> Energy Trust	<input type="checkbox"/> PGE	<input type="checkbox"/> Umpqua Bank	<input type="checkbox"/> Email	<input type="checkbox"/> Mass Transit	<input type="checkbox"/> Other
<input type="checkbox"/> Organization	<input type="checkbox"/> Other Utility		<input type="checkbox"/> Event	<input type="checkbox"/> Newspaper	
If Real Estate Professional Trade Ally please specify name:			If Other:		

**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	
Are you or your household responsible for paying the energy bill at this location? <input type="checkbox"/> Yes <input type="checkbox"/> No		If you checked <b>No</b> , a W-9 is required. Please call 1.866.311.1822 for more information.	
Year Built	Square Feet	Number of Levels	Primary Heating System
System Replaced	<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
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

**Electric Utility Information (Please check the box for your service utility)**

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

**Gas Utility Information (Please check the box for your service utility)**

<input type="checkbox"/> NW Natural	<input type="checkbox"/> Cascade Natural Gas
<input type="checkbox"/> Other Gas Utility (specify)	

**Ducted Heat Pump Incentives**

Ducted Heat Pump Replacement of Electric Resistance Heat		<input type="checkbox"/> Minimum HSPF 8.8 [5-tons or greater only] (\$400)	<input type="checkbox"/> Minimum HSPF 9.0 [any size] (\$450)
Ducted Heat Pump Upgrade or replacement of Non-electric Heat		<input type="checkbox"/> Minimum HSPF 8.8 [5-tons or greater only] (\$200)	<input type="checkbox"/> 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

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**Gas Furnace/Heating Incentives**

<input type="checkbox"/> <b>Gas Unit Heater (\$100)</b> <i>(minimum 80% AFUE)</i>		<input type="checkbox"/> <b>Gas Fireplace (\$100)</b> <i>(minimum FE .65)</i>		<input type="checkbox"/> <b>Gas Fireplace (\$150)</b> <i>(minimum FE .70)</i>		<input type="checkbox"/> <b>Gas Boiler (\$200)</b> <i>(minimum 88% AFUE)</i>		<input type="checkbox"/> <b>Gas Furnace*</b> <i>(minimum 90% AFUE)</i>	
Manufacturer	Model #			Efficiency (%AFUE)	%	ECM		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Serial #	Primary Heating System <input type="checkbox"/> Yes <input type="checkbox"/> No			Installed Cost		Incentive Requested			

\* Combo bonus \$100 if used with Tankless Gas Water Heater *or* .67 EF or greater Tank Water Heater (though April 30, 2010)

**Water Heater Incentives**

Manufacturer		Model #		Serial #		Energy Factor	
Installed Cost	Water Heater Capacity Gallons <input type="checkbox"/> Tankless			Water Heating Fuel*		<input type="checkbox"/> Electricity <input type="checkbox"/> Natural gas	

\* Water Heating fuel type must be one of the following utility providers: PGE, Pacific Power, NW Natural, or Cascade Natural Gas

**Check the appropriate box to identify the incentive you are applying for.**

Check Here	Incentive	Installer Requirements	Energy Requirements
<input type="checkbox"/>	\$ 35	If installed by homeowner, please use form 320S	<b>Electric water heater</b> —Energy Factor of 0.93 or greater
<input type="checkbox"/>	\$ 75	If installed by homeowner, please use form 320S	<b>Electric water heater</b> —Energy Factor of 0.94 or greater and a 20 year manufacturer's tank warranty or greater
<input type="checkbox"/>	\$ 35	Must be installed by a CCB Licensed contractor	<b>Gas water heater</b> —Energy Factor of 0.62 or greater
<input type="checkbox"/>	\$ 200	Must be installed by a CCB Licensed contractor	<b>Tankless gas water heater</b> —Energy Factor of .80 or greater
<input type="checkbox"/>	\$ 100	Must be installed by a CCB Licensed contractor	<b>Gas furnace (90% AFUE or greater) combined with tankless gas hot water system or .67 EF or greater gas tank water heater</b>

**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. **Home Energy Solutions 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 April 30, 2010. 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. Windows are only eligible for

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incentives as an energy-saving measure if they are installed in conjunction with at least one other energy-saving measure. Final determination of eligibility shall rest solely with Energy Trust.

**VERIFICATION AND INSPECTION:** Prior to any payment of incentives, Participant's contractor will verify that the installed energy-saving measures meet Oregon Department of Energy standards. Outdoor temperatures may affect this verification process. Participant's home may also be selected for a quality control post-installation inspection. No warranty is implied by this inspection.

**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.

**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 Home Energy Solutions. Such amounts are subject to change. Current incentive amounts are identified on the web 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, 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.

**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 Home Energy Solutions. 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](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.

**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
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**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
Telephone	Date
<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

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