

**Form 320U
Incentive Application—
Two-, Three- or Four-Unit Apartment Buildings
Existing Homes**



To be completed by Participant and Trade Ally 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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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. To request an extension please contact Energy Trust at 1.866.311.1822. 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
Participant Type	<input type="checkbox"/> Homeowner <input type="checkbox"/> Property Owner or Manager	Occupancy	<input type="checkbox"/> Owner <input type="checkbox"/> Tenant
		Home Telephone	Alt. Telephone
Is this property used for rental income?		If you checked Yes a W-9 is required for payment. Please call 1-866-311-1822 for more information	
		<input type="checkbox"/> Yes	<input type="checkbox"/> No

Site Information (for entire building)

Structure Type: <input type="checkbox"/> Side-by-Side <input type="checkbox"/> Stacked with Separate Exterior Entrances <input type="checkbox"/> Structure with One Exterior Entrance			
Number of Units: <input type="checkbox"/> Duplex <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex <input type="checkbox"/> Other (specify)			
Year Built	Total Square Feet	Number of Levels	
Electric Utility Information: <input type="checkbox"/> Portland General Electric <input type="checkbox"/> Pacific Power <input type="checkbox"/> Other Electric Utility (specify)			
Gas Utility Information: <input type="checkbox"/> NW Natural <input type="checkbox"/> Cascade Natural Gas <input type="checkbox"/> Other Gas Utility (specify)			
Current Primary Heating System	<input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Propane <input type="checkbox"/> Other (specify)	Previous Heating System	<input type="checkbox"/> Baseboard <input type="checkbox"/> Furnace <input type="checkbox"/> Heat Pump <input type="checkbox"/> PTHP <input type="checkbox"/> Other (specify)
<input type="checkbox"/> Upgrading now? <input type="checkbox"/> Upgraded in last year?			
<input type="checkbox"/> Heat Pump <input type="checkbox"/> PTAC <input type="checkbox"/> Other (specify)			
Ducted Forced Air System <input type="checkbox"/> Yes <input type="checkbox"/> No		Water Heater Type	<input type="checkbox"/> Storage <input type="checkbox"/> Tankless
Cooling	<input type="checkbox"/> Central A/C <input type="checkbox"/> Room A/C	Water Heater Fuel	<input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Propane <input type="checkbox"/> Other (specify)
<input type="checkbox"/> Heat Pump <input type="checkbox"/> None			
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

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

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Unit 1 Information (All information is required to process incentive for payment.)

Site Address	Apartment Number
Occupant Name	

Unit 2 Information

Site Address	Apartment Number
Occupant Name	

Unit 3 Information

Site Address	Apartment Number
Occupant Name	

Unit 4 Information

Site Address	Apartment Number
Occupant Name	

Checklist for Incentive(s)

<input type="checkbox"/> Complete and return this entire form. <input type="checkbox"/> Contractor and homeowner signatures are on terms and conditions page. <input type="checkbox"/> Date of installation (all applications must be received within 90 days of initial measure installation). <input type="checkbox"/> W9 Tax Form (if applicable). <input type="checkbox"/> Customized Invoice(s) billing homeowner completed. ^{1 2 3} <input type="checkbox"/> Additional attachments may be required. Please refer to the sample invoice(s) for more information. ¹ <input type="checkbox"/> For each unit, a functioning UL-listed carbon monoxide alarm was installed according to manufacturer's specifications whenever a combustion appliance was present in the home, garage or other attached space.
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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>

**One bonus per small multifamily structure unless the structure is side-by-side with a firewall between units.

***Solar Bonus Package is limited to one bonus per qualifying solar project.

****Heat Pump Commissioning Bonus is limited to one bonus per qualifying heat pump.

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

¹ Customized invoices available at <http://energytrust.org/trade-ally/programs/existing-homes/resources/>

² Duct Testing and Duct Sealing are eligible per qualifying system. Must have a customized invoice and PTCS form for each system.

³ Air Testing and Air Sealing are only eligible per building unless the structure is side-by-side with a firewall between units.

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Return completed form to:

Existing Homes

P.O. Box 40508 ♦ Portland, Oregon 97240-0508
 1.866.311.1822 ♦ Fax 1.866.516.7592
energytrust.org

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Terms and Conditions

APPLICATION: This application 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 from the date of installation.** Incentive 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 (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. Windows are only eligible for 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.

WORK QUALITY VERIFICATION: 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: The incentives will be promptly paid upon: (i) completion of the energy-saving measures, (ii) verification of the measures, and (iii) **submission of this completed application with all required information attached.** 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 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 invoices 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 the energy-saving measures completed as set forth in this application are limited to the amounts set forth in this application. Single family incentives are for dwellings with four or less units per site location. Incentives are paid on a per dwelling basis, and not per unit.

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 grant funds, any other 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: (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 the Existing Homes program. 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 perform the energy-saving measures on the property on which those measures are performed 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 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.

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ENERGY INFORMATION RELEASE: Participant authorizes Energy Trust to access energy usage data for the project's specified 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. 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 is providing 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.

Participant Signature

By signing below, Participant agrees to the terms and conditions beginning on page 3 of this application and authorizes Contractor to submit this application 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. By signing below, Contractor applies to Energy Trust for the incentive amount requested below.

Participant Signature	Total Incentive Requested	Date
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Trade Ally/Contractor Signature(s) By signing below, Trade Ally/Contractor Certifies that measures are complete

Contractor or Trade Ally Company <i>(printed)</i>	Telephone	<input type="checkbox"/> cell <input type="checkbox"/> office
Trade Ally/ Contractor Representative <i>(printed name)</i>	Trade Ally/ Contractor Signature	Date
Contractor or Trade Ally Company <i>(printed)</i>	Telephone	<input type="checkbox"/> cell <input type="checkbox"/> office
Trade Ally/ Contractor Representative <i>(printed name)</i>	Trade Ally/ Contractor Signature	Date

Note: Contractors that are not Energy Trust participating trade allies can perform work for participants provided they are licensed by the Oregon Construction Contractors Board (CCB.) OCCB#

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