

## **Quick Tips for Submitting Energy Trust of Oregon Incentive Applications**

Energy Trust has created these Quick Tips to assist Existing Homes trade allies with the incentive application process. The forms—which must be completed and submitted to Energy Trust within 90 days from date of measure installation—include checklists for customer information, fields for utility account information and home-specific details.

All forms and resources can be downloaded and printed in Microsoft Word or PDF format from the Resources section of the trade ally portal at [www.energytrust.org/ta](http://www.energytrust.org/ta).

### **Energy Trust general program resources**

**Existing Homes Cash Incentive Brochures**—Lists requirements, incentive amounts and tax credit information for existing homes in Oregon and Washington.

### **Energy Trust Existing Homes incentive application forms**

#### **Oregon**

**Weatherization form (320WI)**—Lists incentive amounts and provides fields for insulation R-values (beginning and ending) and U-Values for windows.

##### **Additional requirements:**

- Insulation:
  - Attic, knee wall, rim joist, wall and floor insulation applications require a standard company invoice marked “paid in full.”
- Windows
  - Applications require a second qualifying improvement to be applied for and installed 90 days before or after a windows installation.
  - Proof of window size must be submitted as a packing slip or invoice from the manufacturer, distributor, retailer or contractor. If packing slip or invoice is not available, the Windows Addendum form must be submitted.
  - NFRC sticker(s) are required for each window unless submitting a manufacturer’s packing slip or invoice that includes U-Value for each window.
  - Standard company invoice marked “paid in full.”
- Duct Insulation
  - PTCS Duct Sealing Certificate and NW Duct Sealing Form (if also applying for duct sealing incentives). PTCS duct testing is not required to qualify for duct insulation incentives. Please refer to the duct insulation section of the Weatherization Specifications Manual for complete details.
  - Standard company invoice marked “paid in full.”

**Air Sealing, Duct Sealing and Duct Insulation form (320ADS)**—Provides fields for pre- and post-CFM, Minimum Ventilation Level and leakage reduction information. Air sealing portion includes a checklist of areas where sealing has been performed.

##### **Additional requirements:**

- Air sealing
  - Standard company invoice marked “paid in full”
- Duct sealing and testing
  - PTCS Duct Sealing Certificate and NW Duct Sealing Form
  - Standard company invoice marked “paid in full”

**HVAC and DHW form (320H)**—Lists incentive requirements and amounts for heat pumps, gas boilers, gas fireplaces, direct-vent gas unit heaters and water heaters.

**Additional requirements:**

- Heat pumps
  - CheckMe! or PTCS data sheet required for Heat Pump Commissioning incentive only.
  - Standard company invoice marked “paid in full.”
- Gas boilers, gas fireplaces, direct-vent gas unit heaters and water heaters
  - Standard company invoice marked “paid in full.”

**Weatherization of two-, three- or four-unit apartments form (320U)**—Requires customized invoice to be submitted. Templates for customized HVAC, insulation, windows, duct sealing and air sealing invoices are available under Sample Invoices. Additional attachments may be required. Please refer to the template invoices.

**Additional requirements:**

- W-9 tax form from property owner required if utility bills are not in the property owner’s name.
- Standard company invoice marked “paid in full.”

**Washington**

Energy Trust offers select services, resources and cash incentives for gas-specific upgrades to Washington customers of NW Natural to help them save energy and money on utility costs. Only contractors with an active Washington Contractor’s License can offer services in this region. If you have the proper Washington licensing and would like to apply to be listed as a trade ally for this region, please contact Leana Mathews, trade ally coordinator, at [leana.mathews@energytrust.org](mailto:leana.mathews@energytrust.org) or 503.459.4070.

**NW Natural Washington form (320WA)**—For Washington homes only. Lists qualifying gas measures.

**Energy Trust web resources**

Energy Trust’s website includes additional resources to help trade allies maximize their opportunities while helping customers increase the energy efficiency of their homes.

**Other Existing Homes resources**

- Energy Trust incentive applications and sample invoices
- Weatherization Specifications Manual
- Quality Control Policies and Procedures
- Trade ally directory
- Training and events calendar
- Archived issues of Insider, the monthly trade ally e-newsletter and primary source of trade ally updates
- Cooperative marketing guidelines and forms
- Trade ally equipment discount order form

All forms and resources can be downloaded and printed in Microsoft Word or PDF format from the Resources section of the trade ally portal at [www.energytrust.org/ta](http://www.energytrust.org/ta). For more information on all Energy Trust cash incentives, forms and resources, please call the trade ally hotline at 1.866.365.3526.