

**Form 320S  
Incentive Application—Weatherization, Self-Installed  
Existing Homes**



To be completed by Participant

**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. Incentive offers are subject to funding availability and may change.

A quality control post-installation work quality verification will be performed on all insulation self-install incentive projects and 10% of all electric water heater projects.

**To Ensure Prompt Payment:**

<input type="checkbox"/> Complete and return the entire form, including the Insulation and/or Electric Water Heater Self-Install Checklist on page 3 and/or 4	<input type="checkbox"/> Work complies with specifications at <a href="http://www.energytrust.org/wxspecc">www.energytrust.org/wxspecc</a>
<input type="checkbox"/> Provide service utility information	<input type="checkbox"/> Submit all receipts
	<input type="checkbox"/> Sign the application

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

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

Participant Name		Installed Date	
Site Address	City	State	Zip
Mailing Address for Payment	City	State	Zip
Email	Year Began Occupying Home		
Telephone <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Cell	Alternate Telephone <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Cell		
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 <b>Yes</b> a W-9 is required for payment. Please call 1.866.311.1822 for more information or go to <a href="http://www.irs.gov">www.irs.gov</a> .		

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

**Signature is required on page 5 of this form.**

**Measures and incentives subject to change after August 31, 2012.**

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

Year Built		Square Feet		Number of Levels				
Primary Heating System	<b>Fuel (select one)</b>	<b>System Type</b>		Previous Heating System	<b>Fuel (select one)</b>	<b>System Type (select one)</b>		
	<input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Propane <input type="checkbox"/> Other <b>(specify)</b>	<input type="checkbox"/> Baseboard <input type="checkbox"/> Furnace <input type="checkbox"/> Upgrading now? <input type="checkbox"/> Upgraded in the last year? <input type="checkbox"/> No upgrade <input type="checkbox"/> Heat Pump <input type="checkbox"/> Space Heater <input type="checkbox"/> Other <b>(specify)</b>			<input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Propane <input type="checkbox"/> Other <b>(specify)</b>	<input type="checkbox"/> Baseboard <input type="checkbox"/> Furnace <input type="checkbox"/> Heat Pump <input type="checkbox"/> Space Heater <input type="checkbox"/> Other <b>(specify)</b>		
Ducted Forced Air System		<input type="checkbox"/> Yes	<input type="checkbox"/> No	Cooling	<input type="checkbox"/> Central A/C	<input type="checkbox"/> Heat Pump	<input type="checkbox"/> Room A/C	<input type="checkbox"/> None
Water Heater Fuel	<input type="checkbox"/> Electric	<input type="checkbox"/> Propane		Water Heater Capacity	___ Gallons	<input type="checkbox"/> Tankless		
Basement	<input type="checkbox"/> Crawlspace unimproved	<input type="checkbox"/> Full basement	<input type="checkbox"/> Half basement	<input type="checkbox"/> None				
	<input type="checkbox"/> Crawlspace w/ vapor barrier	<input type="checkbox"/> Garage/ basement combo	<input type="checkbox"/> Slab on grade	<input type="checkbox"/> Other				

**Self-Installed Projects Completed\***

The Existing Homes program must receive applications and receipts within 90 days from the date of installation. **Participant may not include any labor charges for installation.** A quality control post-installation visit will be performed on all insulation self-installed projects, and on 10% of all electric water heater self-installed projects that are submitted for Energy Trust incentives. Incentives will be released after the work passes a work quality verification.

**Electric and Gas Heated Homes Insulation Data (All information is required to process incentive for payment.)**

	Insulation Cost	Beginning R-Value	Ending R-Value	Square Feet	Incentive	Maximum Incentive
Attic Insulation		R-	R-			\$0.25 per square foot, not to exceed cost
Knee Wall Insulation		R-	R-			\$0.30 per square foot, not to exceed cost
Floor Insulation		R-	R-			\$0.30 per square foot, not to exceed cost
<b>Total Insulation Incentive Requested</b>						<b>\$</b>

\*Attic, knee wall and floor insulation may be installed by the homeowner. Vertical walls separating crawlspaces and attics from indoors must be insulated as a part of attic or floor insulation work. Knee wall insulation will not be incentivized by itself. Wall insulation and duct insulation must be installed by a licensed contractor to be eligible for Energy Trust incentives. Please see [www.energytrust.org](http://www.energytrust.org) for more details.

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ATTIC INSULATION SELF-INSTALL CHECKLIST FOR HOMEOWNERS	FLOOR INSULATION SELF-INSTALL CHECKLIST FOR HOMEOWNERS
Download Weatherization Specifications Manual from Energy Trust website: <a href="http://www.energytrust.org/wxspeccs">www.energytrust.org/wxspeccs</a> <input type="checkbox"/>	Download Weatherization Specifications Manual from Energy Trust website: <a href="http://www.energytrust.org/wxspeccs">www.energytrust.org/wxspeccs</a> <input type="checkbox"/>
Please read and use the Foreword, Introduction and Glossary as references. <input type="checkbox"/>	Please read and use the Foreword, Introduction and Glossary as references. <input type="checkbox"/>
Verify adequate Net Free Area ventilation. See: Section AT 1.3 <input type="checkbox"/>	Remove debris from the crawlspace. See: Section UN 1.1 <input type="checkbox"/>
Install baffles at eave vents, heat-producing fixtures, flues and chimneys. See: Section AT 1.4 and 1.6 <input type="checkbox"/>	Verify adequate passive ventilation. See: Section UN 1.2 <input type="checkbox"/>
Build dam at access and where insulation is at different levels to prevent loose-fill falling out of attic. See: Section AT 1.5 and AT 1.11 <input type="checkbox"/>	Seal all floor penetrations. See: Section UN 1.4 <input type="checkbox"/>
Verify all exhaust fans are vented and sealed to outside with no gaps. See: Section AT 1.7, 1.8 and 1.9 <i>Washington customers must insulate all exhaust fan ducts in unconditioned spaces to a minimum of R-4</i> <input type="checkbox"/>	Ensure 6mil black poly ground cover has been installed correctly. See: Section UN 1.3 <input type="checkbox"/>
Insulate water lines in attic space. See: Section AT 1.10 <input type="checkbox"/>	Appropriate R-value insulation installed. See: Section UN 2.0-2.6 and Quick Reference Guide – R-values <input type="checkbox"/>
Insulate and weatherstrip access panel or pull-down stairs. See: Section AT 1.11, 1.12, and 1.13 <input type="checkbox"/>	Entire length of insulation is in contact with the floor. See: Section UN 2.0 <input type="checkbox"/>
Insulate knee walls and cover with air barrier, install blocking in floor under wall. See: Section AT 2.7 <input type="checkbox"/>	Only one vapor retarder is allowed and it shall be in contact with the heated area of building. See: Section UN 2.8 <input type="checkbox"/>
Verify R-value and condition of installation of insulation. See Section AT 2.1, AT 2.2, and Quick Reference Guide – R-values <input type="checkbox"/>	Have the correct supporting techniques employed with appropriate hanging materials. See: Section UN 2.1 and 2.2 <input type="checkbox"/>
Only one vapor retarder is allowed and it shall be in contact with the heated area of building. See: Section AT 2.0 <input type="checkbox"/>	Insulate water lines. See: Section UN 2.3 <input type="checkbox"/>
Knee wall insulation: Vertical walls separating attics or crawlspaces from indoors must be insulated. See: Section AT 2.7 and UN 2.8 <input type="checkbox"/>	Insulate and weatherstrip interior access doors. See: Section UN 2.4 <input type="checkbox"/>
	Verify exterior access doors open easily, weatherproof and vermin proof. See: Section UN 2.5 <input type="checkbox"/>
	Crawlspace walls between living area and crawlspace areas insulated to R-15. See: Section UN 2.8 <input type="checkbox"/>
	Exhaust ducts venting completely to the outside with no gaps. See: Section UN 2.6 and UN 2.7 <input type="checkbox"/>

**Measures and incentives subject to change after August 31, 2012.**

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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**Electric Water Heater Data** (All information is required to process incentive for payment.)

	Water Heater Cost	Energy Factor (EF)	Model Number	Serial Number	Incentive
Electric Water Heater					\$35, Energy Factor of 0.93 or greater
High-Efficiency Electric Water Heater					\$75, Energy Factor of 0.94 or greater and a 20-year tank warranty or greater
<b>Total Water Heater Incentive Requested</b>					<b>\$</b>

**ELECTRIC WATER HEATER SELF-INSTALL CHECKLIST FOR HOMEOWNERS**

Turn off electricity to the heater. <b>IMPORTANT</b> Make sure that there is no electrical power at the heater with a multimeter or test light.	<input type="checkbox"/>
Disconnect wiring, drain the heater and disconnect the water piping.	<input type="checkbox"/>
Remove old heater and position new heater, making sure it is level and pipes and wires will easily reach.	<input type="checkbox"/>
Attach water piping, install temperature and pressure relief valve and any other fittings.	<input type="checkbox"/>
Close heater drain valve.	<input type="checkbox"/>
Open hot water faucet to release trapped air and open cold water inlet to tank.	<input type="checkbox"/>
Check for leaks and fill with cold water <b>before</b> restoring power to the tank.	<input type="checkbox"/>
Reconnect electrical wiring.	<input type="checkbox"/>
Set temperature to 140° for electric water heater tanks, 120° for gas water heater tanks.	<input type="checkbox"/>
Install earthquake or seismic strapping in accordance with the appliance manufacturer's recommendations.	<input type="checkbox"/>

**Bonus offering for homeowners installing multiple qualifying improvements\***

<input type="checkbox"/> \$400 Solar Bonus Package (Solar project + two qualifying energy-efficiency upgrades)
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\*For more information or a list of qualifying upgrades, please visit <http://www.energytrust.org/bonuspackage>

**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 of Oregon, Inc. 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 from the date of installation.** Incentive offers are subject to funding availability and may change. **Incentive amounts are valid through August 31, 2012.** A quality control post-installation work quality verification will be performed on all insulation self-installed projects, and on 10% of all electric water heater self-installed projects that are submitted for Energy Trust incentives. Incentives will be released after the work passes work quality verification. **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, or (iii) Washington residential natural gas service customers of NW Natural. Incentives for energy-saving measures

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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:** Participant 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.**

**PROOF OF PURCHASE:** The receipts accompanying this application must itemize the materials purchased and show the date of purchase.

**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.

**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 or any other incentives. 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 / Applicant 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 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.

**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 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.

**Signature**

By signing below, Participant agrees that he/she has read, understands and agrees to the terms and conditions set forth on pages 4 and 5 of this application. Participant also represents to Energy Trust that the energy-saving measures have been completed and that Participant is eligible to receive the requested incentives.

Participant Name <i>(please print)</i>	Signature	Date
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