

# Payment Request

## New Buildings | Incentive Application | Form 540<sub>PR</sub>



### OVERVIEW

A signed and complete copy of the **Project Enrollment Application (From 510A)** and relevant **Incentive Application(s)** must accompany or precede this form. A signed copy of this **Payment Request** must be submitted to the New Buildings program (Program) along with all required accompanying documentation and **Project Owner's W-9**. The incentive check will be made payable to the **Legal Company Name** listed below.

### PROJECT AND OWNER PAYMENT INFORMATION

Incentive check will be made payable to the company below.

LEGAL COMPANY NAME (MUST MATCH W-9)		ASSUMED BUSINESS NAME (IF DIFFERENT)	
CHECK MAILING ADDRESS		CITY, STATE, ZIP	
OWNER REPRESENTATIVE	TITLE	PHONE	EMAIL

BUILDING/PROJECT NAME	PROJECT ID (IF KNOWN)
SITE ADDRESS	CITY, STATE, ZIP

### INCENTIVE PAYMENT TYPE

Select the **Incentive Application(s)** for which Project Owner is requesting payment and indicate the date the work was completed. **Incentive Applications** submitted for installation incentives are combined by Energy Trust into a single incentive reservation and payment. The total amount of installation incentives payable for a single project will never exceed \$499,999.

Installation Incentives	Date Completed	Other Incentives	Date Completed
Standard Equipment Workbook		Early Design Assistance	
HVAC Calculator		Energy Modeling Assistance	
Lighting Calculator		Technical Assistance for Path to Net Zero	
Market Solutions		Studies completed:	
Modeled Savings		Commissioning: Design Review	
USGBC LEED® Workbook		Commissioning: Functional Testing	
Special Measure Calculation		Commissioning: Acceptance Testing	
		Additional Design Assistance	
		ENERGY STAR®	
		Post-Occupancy for Path to Net Zero	
		Functional Testing	
		Energy Metering	
		Net Zero Certification	
		Other:	

**RETURN FORM TO**  
 Business Energy Solutions – New Buildings  
 100 SW Main Street, #1500, Portland, OR 97204  
 1.877.467.0930 **telephone** 503.961.7642 **fax**  
[newbuildings@energytrust.org](mailto:newbuildings@energytrust.org) **email**

For Program Use Only  
 OM:  
 Project ID:  
 FT ID:

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### GRANT FUNDING

Did Project Owner receive any external funding from sources that directly reduced the final project costs incurred by Project Owner?

Yes  No

(Examples include state/federal funding, grants, discounts, rebates, incentives or other similar types of consideration.) Additional information may be required. The amount of Energy Trust incentive funding for a given efficiency measure may never exceed the final project cost minus Grant Funds received by Project Owner for that measure.

If yes, did this external funding reduce the costs of the energy efficiency measures specified in any of the selected Incentive Application(s) for which Project owner is requesting incentives?

Yes  No

### SB 1149 OHCS OR ODOE FUNDING

Did Project Owner receive any SB 1149 Multifamily Energy Program (formerly known as the Low-Income Weatherization Program) funding through OHCS or SB 1149 Schools Program funding through ODOE for these measures? If so, additional information will be required.

Yes  No

### UTILITY INFORMATION AND RELEASE

If you do not have account information at this time, you are required to provide it once accounts are established. Submit as an attachment if you need additional space. If you are requesting payment for an Installation Incentive (see the *Incentive Payment Type* section), this utility account information must be submitted before we will be able to determine incentive eligibility or process this payment request. Additional documentation may also be required.

Electric Utility Information	Account Number
Portland General Electric (PGE)	
Pacific Power	
Other:	

Gas Utility Information	Account Number	Rate Schedule
NW Natural		
Cascade Natural Gas		
Avista		
Other:		

**OR No gas on site:**

**Energy Usage Release:** Project Owner authorizes Energy Trust and its representatives to access the utility energy usage data for the project's electric and gas utility accounts at the physical address of the site property and represents that it has full authority to grant this authorization. If Energy Trust does not have such utility data, Project Owner hereby authorizes its electric or gas utility representative to release such data to Energy Trust. Project Owner further grants Energy Trust permission to discuss its energy efficiency project with the applicable utility account representative(s) designated to the accounts. Project Owner agrees to provide Energy Trust with such other reasonable assistance as may be necessary to obtain the necessary utility account information.

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## SIGNATURE

By signing and submitting this **Payment Request**, I represent to Energy Trust that (i) I have submitted all required documentation as described in the referenced **Incentive Application(s)**, including the Project Owner's signed W-9 stating the correct federal tax identification number and tax filing address, (ii) I am authorized to submit this **Payment Request** on behalf of Project Owner, including but not limited to authorizing the Energy Usage Release, (iii) the information in the submitted **Project Enrollment Application** agreement remains true and correct as of the date of this submission, (iv) all the information contained here and in any accompanying documentation is complete, truthful and accurate to the best of my knowledge.

Signature

Date

Name

Title

Company

## FOR MORE INFORMATION

Please visit [energytrust.org/business](http://energytrust.org/business) or call 1.877.467.0930

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