Residential | Incentive Application | Form 320 c-HVAC



<u>ummumimmummimmumimm</u>		///////////////////////////////////////					
^a Want your incentive faster?	Customer Info	rmation					
🆄 Apply online.	This home is Own	er occupied 🔲 A rental prope	erty I own*				
Visit www.energytrust.org/now		roperty, and the owner or manager verifiable W-9 is required. Visit <u>ww</u>	is receiving the incentive directly, a				
Steps to completion:	complete, accurate, and	vermable vv-9 is required. Visit <u>www</u>	<u>v.errergytrust.org/ws</u> .				
Make an energy saving improvement in a qualifying residence.	Site address	City	State Zip				
2 Complete application information, including:							
 Contractor and customer signatures Invoices billing the customer for purchase and installation marked "Paid in full" 	Mailing address (if different	ent than site) City	State Zip				
For Energy Trust trade allies submitting this as an instant incentive project:	Primary phone Home	Work Cell Other Phone	☐ Home ☐ Work ☐ Cell				
 Invoice billing the customer must show incentive deductions 	Utility Informat	ion					
3 Submit online form or mail, fax or email	Electric utility:	—	Other				
documentation together to: Energy Trust of Oregon	Gas utility: NW	Natural	S Avista Other				
Residential	Site Informatio	n					
818 SW 3 rd Ave, #215 Portland, OR 97204	Year built	Square feet	Number of levels				
1.866.311.1822 phone 1.866.516.7592 fax residentialforms@energytrust.org 4 Receive your check. Please allow four to six	Primary heating system <i>(check one)</i>	☐ Electric baseboard ☐ Gas f	ess heat pump				
weeks for incentive processing after	Water heating fuel	☐ Electricity ☐ Natura	al gas 🔲 Propane				
completed application and supporting documentation are received. Need-to-know information:	Foundation/ basement		☐ Crawlspace w/ vapor barrier ☐ Crawlspace				
This form should be completed by the			☐ Slab on grade				
Customer and Contractor. • Energy Trust must receive applications	Home type (Oregon): Home type (Washington): □Single-family □Single-family □Manufactured □Rowhouse □Townhouse						
within 60 days from the date of installation.	☐Single-family ☐Manufactured	Duplex Triplex	Fourplex				
All information must be completed for processing; incomplete information will	Are you an Energy Trust trade ally submitting ☐ Yes, instant incentive						
result in delayed payment or disqualification.							
Customer Name and Signature							
By signing below, Customer agrees to the terms and concrequired invoices and documentation to Energy Trust on the been completed satisfactorily by Contractor as of the sign identifies as a landlord or property owner applying for a sign property. If identified as an Energy Trust instant incention incentives that meet Energy Trust requirements to	Customer's behalf. By that ature date below and all ac ngle-family rental property tive project, Customer u n	authorization, Customer represents to companying documentation is comple incentive, Customer affirms that they on derstands and agrees that Energy	Energy Trust that all measures have the and accurate. If Customer own and do not reside in the Trust will issue incentive check				
Customer signature	Full name (please p	rint and use same name as on inv	roice) Date				
Customer email address (application status	s updates are sent via e	mail)					
Contractor Name and Signature							
By signing below, Contractor certifies that this application and all accompanying documentation is complete and accurate, and all improvements associated with this incentive request were completed as of the signature date below. Incentives are payable to Customers only unless part of an instant incentive project. If identified as an instant incentive project, Contractor has shown instant incentive amount listed above as itemized discounts from Customer's invoice and agrees to the terms and conditions set forth in Form 372IN: Participation Agreement – Instant Incentives. To receive incentives, all work must comply with the Residential Specifications Manual and all other Energy Trust program requirements.							
Contractor signature	Full name (please pr	int)	Date				
Contractor company OCCB#	or Washington Licen	se # (Non-trade ally only)	Install date				





Ductless Heat Pump Incentive One incentive per residence. Residence must be located in Oregon and primarily heated by PGE or Pacific Power. If a single-family home replacing electric zonal heat with an additional non-electric heating source in the primary living space other than the installed ductless heat pump, see Ductless Heat Pump Incentives (with

additional non-electric heating source) incentive on page 3.								
	Upgrade t	ype	Requirements			Incentive amount		
	Ductless I pump	neat	Must have an HSPF2 of 8.10 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution (AHRInet.org) and replace electric resistance heat as the residence's primary heating system. Primary indoor unit must be installed in the main living space (e.g., living room, great room). If installed in a single-family home replacing electric zonal heat, main living space cannot have an additional non-electric heating source present in primary living space.). Mini-split systems with limited ducting may be eligible, email residentialta@energytrust.org for review and approval					
	Ductless I pump in a family ren property	single-	Must have an HSPF2 of 8.10 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution (AHRInet.org) and replace electric resistance heat as the residence's primary heating system. Primary indoor unit must be installed in the main living space (e.g., living room, great room). Mini- split systems with limited ducting may be eligible, email residentialta@energytrust.org for review and approval. Must be offered as an Energy Trust instant incentive by an approved trade ally to qualify.					
Rea	ch. Contact	your Energy		ore information on how to off	er increas	nts that qualify for Savings Within ed incentives. Ducted heat pumps tails.		
In w	hat type of	room was	the primary indoor unit inst	alled? (e.g., living room, g	reat roon	n):		
If a single-family home, is there an additional heating source being used to heat the room? No Yes, electric baseboard heater(s) Yes, electric cadet heater(s) Yes, electric floor radiant heat Yes, other electric heating source (please describe): Yes, a non-electric heating source – if replace electric zonal heat, please apply for Ductless Heat Fincentive (with additional non-electric heating source page 3.				ric heating source – if replacing ease apply for Ductless Heat Pump				
(Syst	• •	ng natural gas	or any other non-electric	Electric furnace Electric wall heat Other:		ectric radiant heat ectric baseboard		
Source being used to heat the primary living space? If so, what is it?** Oil heater								
Is a	Is an AHRI certificate attached to this application? The Yes No — If no, provide heat pump outdoor unit information below. Installed Cost \$:					led Cost \$:		
Qty of outdoor units: Qty of indoor units:		Total capacity (BTUs): HSPF2:		HSPF2:				
Outo	door unit*:	unit*: Manufacturer: Model: Serial #:		Serial #:				
Indo	Indoor unit*: Model:							
* ୮.,	oray Truct in	acetive is in	standed to offeet the east of an	a author unit and and indo	r unite ada	litianal unita ara unlikalu ta praduas		

Energy Trust incentive is intended to offset the cost of one outdoor unit and one indoor unit; additional units are unlikely to produce significant additional energy savings. If more than one outdoor and/or indoor unit is installed, please provide information for the highest capacity unit.

^{**} Presence of an additional non-electric heating source that serves the same primary living space as the ductless heat pump can reduce the amount of electric energy savings and impact the project's incentive amount.





	Ductless pump inst a single-fa home	talled in amily	heat as the residence's primary heating system. Primary indoor unit must be installed in the main living space (e.g., living room, great room). Main living space allowed to have an additional non-electric heating source present. Minisplit systems with limited ducting may be eligible, email residentialta@energytrust.org for review and approval.					
In wl	hat type of	f room was	the primary indoor unit	inst	alled? (e.g., living room	n, gre	at roon	า):
(A du	What type of heating system did this replace? (A ductless heat pump displacing natural gas or any other non-electric fuel as the home's primary heating source will not qualify for incentive.) Electric radiant heat Electric furnace - please apply for a Ductless Heat Pump Incentive on page 2 Other electric source:							
heating source being used to heat the primary living space 2**			ellet il he	stove/fireplace stove eater ne heater	☐ Gas stove/fireplace ☐ None or an electric heating source – please apply for Ductless Heat Pump Incentive on page 2			
Is an AHRI certificate attached to this application? Yes No — If no, provide heat pump outdoor unit information below. Installed Cost \$:								
Qty of outdoor units:):		HSPF2:			
Outd	oor unit*:	Manufactu	ırer:		Model:			Serial #:
Indoo	or unit*:	Model:						
* Fne	erav Trust i	ncentive is in	tended to offset the cost of	of on	e outdoor unit and one in	door i	ınit: add	ditional units are unlikely to produce

^{*} Energy Trust incentive is intended to offset the cost of one outdoor unit and one indoor unit; additional units are unlikely to produce significant additional energy savings. If more than one outdoor and/or indoor unit is installed, please provide information for the highest capacity unit.

^{**} Presence of an additional non-electric heating source that serves the same primary living space as the ductless heat pump can reduce the amount of electric energy savings and impact the project's incentive amount.





Ducted Heat Pump Incentives Residence must be located in Oregon and primarily heated by PGE or Pacific Power.						
Upgrade type	Requirements		Incentive amount			
Ducted heat pump	HSPF2 7.50 or greater. Must be residence's primary heat source and replace electric forced air furnace. Thermostat lockout must be set to 35°F or lower if electric furnace auxiliary heat present. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives.					
Ducted heat pump in a single-family rental property	forced air furnace. Thermostat lo auxiliary heat present. Cannot be	residence's primary heat source a ckout must be set to 35°F or lower combined with other heat pump, flust be offered as an Energy Tru palify.	r if electric furnace heat pump controls \$3,000			
		incentive amount for Oregon resident are information on how to offer increas				
What type of heating	g system did this replace?	Electric furnace				
Is an AHRI certificat to this application?		nformation below:	Installed Cost \$			
Heat Pump	HSPF2:	EER2:	SEER2:			
neat Fullip	Manufacturer:	Model:	Serial #:			
Ducted Heat Pump Controls Incentives Residence must be located in Oregon and primarily heated by PGE or Pacific Power.						
Upgrade type Requirements Incentive amount						
Heat pump controls Must be added to a heat pump with electric furnace auxiliary heat. Heat pump must be home's primary heat source. Visit www.energytrust.org/heatpumpcontrols for eligible models and more information. Thermostat lockout settings must be set to 35°F lockout. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives.						
Thermostat	Lockout temperature:	°F	Installed Cost \$:			
monitorial	Manufacturer:	Model Name:	Model #:			





COOIING INCENTIVES One incentive per residence. Residence must be located in Oregon and serviced by PGE or Pacific Power.						
Upgrade type	Requirements				Incentiv	e amount
Central Air Conditioner	Must be a qualifying central air conditioner serving most or all of the home. Residences primarily heated with a heat pump do not qualify. Nominal SEER2 rating of the outdoor unit as listed by the manufacturer must be between 14.25 – 15.19 . System EER2 must be 11.40 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution (AHRInet.org). For a list of known qualifying units, please visit: www.energytrust.org/central-air-conditioners/					
Central Air Conditioner	primarily heated vunit as listed by the 11.40 or greater a (AHRInet.org). For	Must be a qualifying central air conditioner serving most or all of the home. Residences primarily heated with a heat pump do not qualify. Nominal SEER2 rating of the outdoor unit as listed by the manufacturer must be 15.20 or greater . System EER2 must be 11.40 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution (AHRInet.org). For a list of known qualifying units, please visit: www.energytrust.org/central-air-conditioners/				
Central Air Condition Installed Cost:	er \$		ing system cost (if app		\$	
Did this Central Air C	Conditioner replace	e an existing Central A	ir Conditio	ner?	Yes ☐ No	
Is an AHRI certificate attached to this application? Yes - provide installed system's AHRI certificate number: No - (note: applications submitted without a matching AHRI certificate may result in delayed payment or disqualification).					te may	
Cooling System	Information R	Required for all submiss	ions			
Outdoor Unit Manufa	octurer:		Outdoor	Unit Model N	umber:	
Indoor Unit Evaporator Coil Manufacturer: Indoor Unit Evaporator Coil Model:						
Furnace/Blower Manufacturer (new <i>or</i> existing): Furnace/Blower Model # (new <i>or</i> existing):						
Outdoor unit SEER2 per manufacturer:	I SVSIEM FERZ					
		configurations. If certificate in the system will be quality chec			n Valve (TXV) and/or Time Delay	Relay (TDR)
Smart Thermostat Incentives For self-installed projects, apply online at www.energytrust.org/now or use Form 320S. Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. Washington residences must be primarily heated by NW Natural.						
Upgrade type	Requirements				Incentiv	ve amount
Smart thermostat	Residence must be primarily heated by an electric furnace, gas furnace, or ducted heat pump if located in Oregon. Residence must be primarily heated by a gas furnace if located in Washington. Thermostat must be connected to the internet through a Wi-Fi network and configured with the home's location. Visit www.energytrust.org/thermostat for eligible models. Cannot be combined with other Energy Trust controls incentives or smart thermostat offers.					
☐ Smart thermostat	Residence must be an owner-occupied small multifamily home¹ primarily heated by a gas furnace if located in Washington. Thermostat must be connected to the internet through a Wi-Fi network and configured with the home's location. Visit www.energytrust.org/thermostat for eligible models. Cannot be combined with other Energy Trust controls incentives or smart thermostat offers.					
Thormostat	Manufacturer:			Installed Co	st \$:	
Thermostat	Model Name:			Model #:		





///////				///////////////////////////////////////	///////////////////////////////////////	///////////////////////////////////////	
Gas Was	Gas Fireplace Incentives Oregon residences must be serviced by NW Natural, Cascade Natural Gas or Avista. Washington residences must be serviced by NW Natural. (Select one)						
U	pgrade type	Requirements	i				Incentive amount
	Gas fireplace (FE 75%+)	visit www.energ	FE of 75% or greater with electronic pilot ignition. For a list of eligible models visit www.energytrust.org/fireplace . A CO monitor is required on every floor with a bedroom.				
	Gas fireplace (FE 70% - 74.9%)		gytrust.org/f			st of eligible models quired on every floor	
	Finantasa	FE: %	Manufad	cturer	Mod	del	
	Fireplace	Serial #				alled cost: luding equipment)	\$
	s Furnace Incenta. Washington resid				ated by NI	W Natural, Cascade N	latural Gas or
U	pgrade type	Requirements	ı				Incentive amount
	Gas furnace installed in a single-family rental property	Oregon rentals only. Must be residence's primary heat source with AFUE of 95% or greater. Not eligible for gas furnaces used as backup for highefficiency heat pumps. Residence must be single-family or manufactured home. A CO monitor is required on every floor with a bedroom. Must be offered as an Energy Trust instant incentive by an approved trade ally to qualify. Cannot be combined with other gas furnace incentives.					
	Gas furnace installed in a rental property	Washington rentals only. Must be residence's primary heat source with AFUE of 95% or greater. Not eligible for gas furnaces used as backup for high-efficiency heat pumps. Residence must be single-family, manufactured or a small multifamily home¹. A CO monitor is required on every floor with a bedroom. Must be offered as an Energy Trust instant incentive by an approved trade ally to qualify. Cannot be combined with other gas furnace incentives.					
	Gas furnace installed in an owner-occupied home Washington residences only. Must be residence's primary heat source with AFUE of 95% or greater. Not eligible for gas furnaces used as backup for high-efficiency heat pumps. Residence must be an owner-occupied single-family, manufactured, or a small multifamily home¹. A CO monitor is required on every floor with a bedroom.						
Gas furnace incentives are available at an increased incentive amount for Oregon residents that qualify for Savings Within Reach. Contact your Energy Trust account manager for more information on how to offer increased incentives.							
What type of heating system did this replace?: Gas furnace Electric furnace Oil heater Wood Other:							
ECM	1?	Yes					
Man	Manufacturer: Model: Serial #:						

¹For Washington multifamily residences, gas furnace and smart therrmostats must be installed in a duplex, triplex, fourplex, or side-by-side property

Residential | Incentive Application | Form 320c-HVAC



Terms and Conditions

APPLICATION: This application and any required additional documentation must be filled out completely, truthfully and accurately. Customers may wish 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. Energy Trust must receive applications within 60 days after the date of installation. Incentives offers are subject to funding availability and may change. Incentive amounts are valid for installations done through December 31, 2024. Please allow 4-6 weeks for incentive processing.

ELIGIBILITY: Incentives are available to eligible Customers who are: (i) Oregon residential electric service customers of Portland General Electric or Pacific Power, (ii) Oregon residential natural gas service customers of NW Natural, Cascade Natural Gas or Avista, or (iii) Washington residential natural gas service customers of NW Natural. 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, Cascade Natural Gas and Avista customers who heat their homes with natural gas. Final determination of eligibility shall rest solely with Energy Trust. All measures must be installed by an Energy Trust trade ally contractor or any other Oregon or Washington licensed contractor.

ELIGIBLE PRODUCTS: Products must meet Energy Trust energy efficiency specifications. These specifications may be found on the web at 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.

WORK QUALITY VERIFICATION: Prior to any payment of incentives, Contractor will verify that the installed energy-saving measures meet Energy Trust of Oregon specifications (as defined by Building Performance Institute and the current Energy Trust Specification Manual). Outdoor temperatures may affect this verification process. Customer's home may also be selected for a quality control postinstallation visit. No warranty is implied by this work quality verification.

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 Customer unless submitted as an instant incentive project. Instant incentive projects will be paid to the contractor.

PROOF OF PURCHASE: The invoice documentation accompanying this application must itemize the products purchased and/or work performed. The invoice must show a description of any installation or other labor charges and that the invoice is paid in full.

INCENTIVE AMOUNT: Incentive amount cannot exceed total installed cost. Incentives for energy-saving measures completed and/or installed as set forth in documentation accompanying this application are limited to the amounts provided by Energy Trust. Such amounts are subject to change. Current incentive amounts are identified on the web at 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 Customer 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, are the same as delivery of the original signed document. Scanned original documents transmitted to Energy Trust as an attachment via electronic mail are the same as delivery of the original signed document. At the request of Energy Trust, Customer shall confirm documents with a facsimile transmitted signature or a scanned signature by providing the original document.

SAFETY AND BUILDING CODES: Customer 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. 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: Customer represents that Customer 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. Customer agrees to provide reasonable access to the property for the purposes described herein.

DISCLAIMER/NO LIABILITY: Customer understands that, although Energy Trust may provide Customer with an incentive payment, Energy Trust is not supervising work performed for Customer 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 Customer in implementing energy-saving measures. Customer assumes the risk of any loss or damage(s) that Customer 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.

ENERGY INFORMATION RELEASE: Customer authorizes Energy Trust and the contractor signing this application to access utility energy usage data, including without limitation interval data, relating to the property on which energy-saving measures have been completed and/or installed. To do so, Energy Trust may access the electric and natural gas accounts and thermostat usage information at the physical address of the project, and the contractor may access thermostat usage information at the physical address of the project. Customer agrees to provide reasonable assistance to Energy Trust to obtain such information. Customer also authorizes the contractor signing this application to share information about the Customer's thermostat system, including, without limitation, thermostat usage information, with Energy Trust.

INFORMATION RELEASE: Customer agrees that Energy Trust may include Customer's name, Energy Trust services and resulting energysavings in reports or other documentation submitted to Energy Trust, its Board of Directors, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing and Community Services, the Oregon Legislature, and/or other government agencies. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate.

Residential | Incentive Application | Form 320_{C-HVAC}



Optional Customer Demographic Information (If completed, choose all that apply)

Why is Energy Trust asking for this information?

Energy Trust is asking customers to submit demographic information because it is our responsibility to ensure that all customers can directly benefit from our services. We believe demographic data collection is a simple yet powerful tool for pursuing equity and inclusion in our work and programs. Receiving the information below about our customers will give us a clearer picture of program participation rates within our Residential Programs. We will use that information to assess our offers and identify barriers to participation, enabling us to develop and improve offers to reduce or eliminate those barriers. Questions about household income and full-time residents can help identify if you and your household may be eligible for increased Energy Trust incentives

Providing this information is optional, does not impact your participation in the program, and will be held confidential by Energy Trust.

Do you (or someone in your household) rent or own your home? Own Rent Live there but don't pay rent Prefer to self-describe	What best describes your gender? Female Male Non-binary/third gender Prefer to self-describe	What is the primary language(s) used in your household? (select all that apply) Chinese English French German	How many full-time residents live in your home?* 1 2 3 4
☐ Prefer not to answer	☐ Prefer not to answerWhich of the following	☐ Hindi ☐ Japanese	□ 6 □ 7
Which of the following racial and ethnic backgrounds best describe you? (choose all that apply) Asian or Asian American Black or African American Hispanic or Latino/a/x Middle Eastern or North African Native American or Alaskan Indian Native Hawaiian or other Pacific Islander White Some other race:	ranges describes your total household income for the previous year before taxes?* Less than \$25,000 \$25,000 - \$34,999 \$35,000 - \$49,999 \$50,000 - \$74,999 \$75,000 - \$99,999 \$100,000 - \$149,999 \$150,000 - \$199,999 \$200,000 or more Don't know Prefer not to answer	Korean Russian Spanish Tagalog Vietnamese Another language Prefer not to answer How long have you lived in your current home? Less than a year 1-2 years 3-5 years 6-10 years More than 10 years Don't know	□ 8 □ 8+
☐ Prefer not to answer		☐ Prefer not to answer	
* Questions about household inco	ome and full-time residents can help	identify if you and your household	may be eligible for increased