

To be completed by Customer and Contractor

////////////////////////////////////
 CLEAResult is a contractor of Energy Trust of Oregon

Steps to completion:

- 1 Make** an energy-saving upgrade in a qualifying residence.
 - Bid amount must be preapproved by the Program prior to installation and fall within cost guidelines.
- 2 Complete** this application, including:
 - Customer signature.
 - Contractor signature.
 - Invoice must show incentive deductions.
- 3 Submit** documentation via email to InHome@energytrust.org.
- 4 Contractor receives check.** Please allow four to six (4-6) weeks for incentive processing after completed application and supporting documentation are received.

Need-to-know information:

- **This form should be completed by the Customer and Contractor.**
- **Energy Trust must receive applications within 60 days from the date of installation.**
- **All information must be completed for processing; incomplete information will result in delayed payment or disqualification.**
- **Payment to be issued to the installing Contractor.**

Customer Information (Completed by Customer)

This home is Owner occupied A rental property I own

Site address _____ City _____ State _____ Zip _____

Primary phone _____ Other Phone _____

Utility Information (Completed by Customer)

Electric utility: PGE Pacific Power Other _____

Gas utility: NW Natural Cascade Natural Gas Avista Other _____

Site Information (Completed by Customer)

Year built	Square feet	Number of levels
Primary heating system (<i>check one</i>)	<input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Ducted heat pump	<input type="checkbox"/> Ductless heat pump <input type="checkbox"/> Gas furnace <input type="checkbox"/> Gas fireplace <input type="checkbox"/> Other _____
Water heating fuel	<input type="checkbox"/> Electricity	<input type="checkbox"/> Natural gas <input type="checkbox"/> Propane
Foundation/ basement	<input type="checkbox"/> Garage/basement combo <input type="checkbox"/> Half basement <input type="checkbox"/> Full basement	<input type="checkbox"/> Crawlspace w/ vapor barrier <input type="checkbox"/> Crawlspace <input type="checkbox"/> Slab on grade
Home type	<input type="checkbox"/> Single-family <input type="checkbox"/> Townhouse <input type="checkbox"/> Duplex	<input type="checkbox"/> Manufactured <input type="checkbox"/> Rowhouse <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex

Additional Funding Sources

Was there an additional funding source applied to this project? Yes* No additional funding

***If yes, please specify the amount from each source.**

PCEF \$ ODOE \$ OHCS \$ Other: \$


This **Form 320IES** is used for completed home upgrades under Energy Trust's In-Home Energy Services (IES) program. Prior to submitting this form, Customer shall have signed and have on file with Energy Trust all required forms, including **Form 350IES: Customer Participation Agreement** and **Form 300IES: Customer Authorization & HEA**.

To be completed by Customer and Contractor

////////////////////////////////////
 CLEAResult is a contractor of Energy Trust of Oregon

Customer Name and Signature (Completed by Customer)


By signing below, Customer (i) agrees to the terms and conditions in this application, (ii) acknowledges that this Form is also subject to the terms and conditions previously agreed to in **Form 350IES: Customer Participation Agreement**, and (iii) authorizes Contractor to submit this application and all required invoices or documentation to Energy Trust on Customer's behalf. By that authorization, Customer represents to Energy Trust that all upgrades have been completed satisfactorily by Contractor as of the signature date below and all accompany documentation is complete and accurate. Customer understands and agrees that Energy Trust will issue a funding check for upgrades that meet Energy Trust requirements to the Contractor named below and that Customer is responsible for paying any remaining amounts on the invoice(s). Energy Trust may deny funding for any energy upgrades that do not meet Energy Trust requirements or for any other reason, in its sole discretion. By signing this agreement, the signer confirms that they are either the Customer or have the legal authority to sign on the Customer's behalf.



Customer signature	Full name (please print and use same name as on invoice)	Date
---------------------------	---	-------------

Contractor Name and Signature (Completed by Contractor)

To receive funding for a qualifying upgrade, the Contractor completed the upgrade understands and agrees that, if this authorization is fully signed and all requirements are met (e.g., an invoice and all required documentation are submitted), Energy Trust will issue the funding check to the Contractor named below at the address listed below. 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 and in alignment with all Energy Trust requirements. Contractor also certifies that the work completed matches the scope and cost of the pre-approved bid(s). To receive incentives, all work must comply with the [Residential Specifications Manual](#), **Form 372IES: Contractor Participation Agreement**, and all other Energy Trust program requirements. Incentive offers are subject to funding availability and may change. Please allow 4-6 weeks for incentive processing. Failure to deliver all required information may result in a delay or withholding of payment. Energy Trust is not responsible for any tax liability that may be imposed as result of any incentive payments, Energy Trust is not providing tax advice, and Energy Trust communications cannot be used for the purposes of avoiding IRS penalties.



Contractor signature	Full name (please print)	Date	
Contractor company	OCCB#	Install date	
Company Address (To receive funding check)	City	State	Zip

To be completed by Customer and Contractor

CLEAResult is a contractor of Energy Trust of Oregon

Heating & Cooling

Ductless Heat Pump (Completed by Contractor)		
▶ Residence must be located in Oregon and primarily heated by PGE or Pacific Power.		
Upgrade type	Requirements	IES Incentive
Ductless heat pump	Must have an HSPF2 ¹ 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). Single-indoor head, single compressor (1:1) systems are preferred, 2:1 systems can be approved in some cases. No-cost option requires pre-approval from InHome@energytrust.org .	<input type="checkbox"/> \$1,800 single family home <input type="checkbox"/> \$3,500 manufactured home <input type="checkbox"/> No-cost, income-qualified option
AHRI Certificate Number:		Installed Cost \$:
What type of heating system did this replace? (Systems displacing natural gas or any other non-electric fuel will not qualify for incentive.) <input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric radiant heat <input type="checkbox"/> Electric wall heat <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Other:		
Outdoor Unit		
Qty of outdoor units:	Total capacity (BTUs):	HSPF2:
Manufacturer:	Model Number:	Serial #:
Indoor Unit		
Qty of indoor units:	Primary Living Space Room Type:	
Manufacturer:	Model Number***:	
Did this project include ceiling cassettes or a concealed air handler serving a slim/short duct run? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Did the installation add heating to any previously unconditioned rooms? (multi-zone projects only) <input type="checkbox"/> Yes <input type="checkbox"/> No		
Secondary Heat Source Is there an alternate, non-electric heating source being used to heat the primary living space? If so, what is it?		
<input type="checkbox"/> Oil heater <input type="checkbox"/> Propane heater <input type="checkbox"/> Gas stove <input type="checkbox"/> Wood stove <input type="checkbox"/> Pellet stove <input type="checkbox"/> Gas fireplace <input type="checkbox"/> No secondary heating system present <input type="checkbox"/> Other:		
* 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. *** Invoice documentation for ductless heat pump projects must include all model numbers for the indoor and outdoor components of the system.		

To be completed by Customer and Contractor

CLEAResult is a contractor of Energy Trust of Oregon

Heating & Cooling (cont.)

Ducted Heat Pump (Completed by Contractor) ▶ Residence must be located in Oregon and primarily heated by PGE or Pacific Power.		
Upgrade type	Requirements	IES Incentive
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. No-cost option requires pre-approval from InHome@energytrust.org .	<input type="checkbox"/> \$4,000 <input type="checkbox"/> No-cost, income-qualified option
Extended capacity heat pump	Must be residence's primary heating source. Not required to replace electric heat . Heat pump must be a central ducted system included in Energy Trust's list of qualifying products . Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available. Heat pump cannot have a backup gas heating system. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. Indoor Configuration: Eligible systems configurations must include a central ducted system serving the primary living space of the home.	<input type="checkbox"/> \$2,000
Extended capacity heat pump – replacing electric forced air furnace	Must replace electric forced air furnace as residence's primary heating source. Heat pump must be a central ducted system included in Energy Trust's list of qualifying products . Controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations when available. Heat pump cannot have a backup gas heating system. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. Indoor Configuration: Eligible systems configurations must include a central ducted system serving the primary living space of the home.	<input type="checkbox"/> \$6,000
What type of heating system did this replace? <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Wall heat <input type="checkbox"/> Electric furnace <input type="checkbox"/> Other:		
Is an AHRI certificate attached to this application? <input type="checkbox"/> Yes <input type="checkbox"/> If no, provide information below:		Installed Cost \$
HSPF2:	EER2:	SEER2:
Manufacturer:	Model:	Serial #:

Gas Furnace (Completed by Contractor) ▶ Oregon residences must be serviced by NW Natural, Cascade Natural Gas or Avista.		
Upgrade type	Requirements	IES Incentive
Gas Furnace	95% annual fuel utilization efficiency (AFUE) or greater. Gas furnaces used as backup for high efficiency heat pumps, also known as hybrid systems, are not eligible.	<input type="checkbox"/> \$2,900
What type of heating system did this replace? <input type="checkbox"/> Gas furnace (functioning, non-condensing) <input type="checkbox"/> Gas furnace (non-functioning) <input type="checkbox"/> Electric furnace <input type="checkbox"/> Oil furnace <input type="checkbox"/> Other:		
AFUE: %	Installed Cost: \$	Serial #:
Manufacturer:	Model:	

In-Home Energy Services

Residential | Project Details | Form 320IES



To be completed by Customer and Contractor

////////////////////////////////////
 CLEAResult is a contractor of Energy Trust of Oregon

Heating & Cooling (cont.)

Smart Thermostat (Completed by Contractor)		
▶ Residence must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista.		
Upgrade type	Requirements	IES Incentive
Smart Thermostat	Residence must be primarily heated by an electric furnace, gas furnace, or existing ducted heat pump. Must indicate whether thermostat was connected to Wi-Fi. Visit http://www.energytrust.org/thermostat for eligible models. Cannot be combined with other controls or new heat pump incentives.	<input type="checkbox"/> \$250
Thermostat	Manufacturer:	Installed Cost \$
	Model Name:	Model #:

Water Heating

Heat Pump Water Heater (Completed by Contractor)		
▶ Residence must be located in Oregon and primarily heat water with electricity provided by PGE or Pacific Power.		
Upgrade type	Requirements	IES Incentive
Heat Pump Water Heater	Eligible models must meet Northwest Energy Efficiency Alliance's (NEEA's) Advanced Water Heater Specification Tier 3 to qualify for this incentive. Tank may be any size. A midstream incentive may be available through retailers and distributors. No-cost option requires pre-approval from InHome@energytrust.org.	<input type="checkbox"/> \$240 <input type="checkbox"/> No-cost, income-qualified option
Water Heater	Manufacturer:	Model: UEF:
	Serial number:	Installed cost:
	Location installed: <input type="checkbox"/> Garage <input type="checkbox"/> Basement <input type="checkbox"/> Crawlspace <input type="checkbox"/> Main home <input type="checkbox"/> Other:	

To be completed by Customer and Contractor

////////////////////////////////////
 CLEAResult is a contractor of Energy Trust of Oregon

Weatherization

Insulation in Manufactured Homes (Completed by Contractor)									
▶ Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista.									
Insulation type	Max beginning R-value	Insulate to:	Quantity installed	Beginning R-value	Ending R-value	Cavity filled?	Installed cost	IES Incentive (per sq. ft)	
								Electric	Gas
Floor	R-11	R-22 or fill cavity	sq. ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$1.45	<input type="checkbox"/> Up to \$1.76
Attic	R-11	R-30 or fill cavity	sq. ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$2.13	<input type="checkbox"/> Up to \$1.74
Insulation in Single-Family Homes (Completed by Contractor)									
▶ Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista.									
Insulation type	Max beginning R-value	Insulate to:	Quantity installed	Beginning R-value	Ending R-value	Cavity filled?	Installed cost	IES Incentive (per sq. ft)	
								Electric	Gas
Wall	R-4	R-11 or fill cavity	sq. ft. (total of all types)	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$2.32	<input type="checkbox"/> Up to \$3.30
<ul style="list-style-type: none"> Includes rim joist and knee wall. If applying for multiple wall insulation types, provide beginning R-value of wall insulation type with largest sq. ft installed. For rim joist insulation to qualify, must be insulated to R-15 or fill cavity. For knee wall insulation to qualify, must be insulated to R-15 for 2x4 cavities; R-21 for 2x6 cavities. 									
Floor	R-11	R-30 or fill cavity	sq. ft.	R-	R-	<input type="checkbox"/>	\$	<input type="checkbox"/> Up to \$1.09 <input type="checkbox"/> Up to \$3.65	<input type="checkbox"/> Up to \$3.00
Attic (R0-R11)	R-11	R-38	sq. ft.	R-	R-	-	\$	<input type="checkbox"/> Up to \$3.00	
Attic (R-12 to R-18)	R-18	R-38	sq. ft.	R-	R-	-	\$	<input type="checkbox"/> Up to \$2.49	
Attic Insulation with Additional Costs	If this attic insulation project included any of the following costs that caused the project to cost more than \$3.00/sq. ft, higher incentives may be available. Use the excel spreadsheet insulation calculator to identify the higher incentive option and submit the calculator in addition to this form. <i>Existing insulation must be R-18 or less. Must insulate to R-38 or greater or fill cavity.</i>							<input type="checkbox"/> Higher Incentive Option	

To be completed by Customer and Contractor

CLEAResult is a contractor of Energy Trust of Oregon

Other

Additional Funds		
<p>► Funds may be available for reducing customer costs for qualifying upgrades and/or repairs that are required to enable other upgrades identified on this form. Identify the additional funding source, select the relevant uses of funds, and input the related costs and incentive request amount. Cannot be layered with other Federal funding grants.</p>		
Funding Source	Requirements	Incentive
<input type="checkbox"/> Climate Pollution Reduction Grant (CPRG) - Federal Funds	<p>An insulation measure must be selected, above. Provides up to \$2,000 in flexible funds for projects that include an insulation measure. Funds can be used to reduce customer costs for insulation or for repairs enabling insulation or weatherization.</p> <p>Use of funds:</p> <p><input type="checkbox"/> Reduce Customer Cost. Insulation Cost Only</p> <p> <input type="checkbox"/> Ductwork <input type="checkbox"/> Electrical <input type="checkbox"/> Enabling Upgrade <input type="checkbox"/> Hazard Mitigation <input type="checkbox"/> Moisture <input type="checkbox"/> Weatherization <input type="checkbox"/> Other repair: </p>	<p>Total Enabling/Repair Cost: \$</p> <p>Incentive Request: \$</p>
<input type="checkbox"/> Critical Home Repair	<p>Limited funds are available for qualifying Critical Home Repairs. Cost maximum is the greater of \$1,000 or 25% of project total. Requires email pre-approval from an IES Program representative at InHome@energytrust.org.</p> <p>Repair Type</p> <p> <input type="checkbox"/> Ductwork <input type="checkbox"/> Electrical <input type="checkbox"/> Enabling Upgrade <input type="checkbox"/> Moisture <input type="checkbox"/> Weatherization <input type="checkbox"/> Hazard Mitigation <input type="checkbox"/> Other repair: </p>	<p>Total Cost: \$</p> <p>Repair Incentive: \$</p>