



HEA INCENTIVES GUIDE

SUBMITTING A HOME ENERGY ASSESSMENT INCENTIVE REQUEST

OVERVIEW

- **Form 300CPF** is used to:
 - Authorize Energy Trust of Oregon to provide funding for approved energy updates that meet program qualifications.
 - Submit a request to receive funding for a home energy assessment (HEA) and outline what potential upgrades may be needed for the home.

HOW TO COMPLETE THE FORM

- Starting on page 2, select the appropriate residence type (as the incentive amount can change based on the housing type).
- **Question 1:** If marked "Yes," clarify which measure(s) will be paid or reimbursed to the organization originating the work:
 - Home energy assessment
 - Heat pump upgrades
 - Duct sealing/repair
 - Insulation
- Water heating **Question 1a:** Check the box for HEA (minimum requirement).
- If the contractor is receiving the HEA and/or payment for measure(s), the CBO section should be marked "No."

- **Question 2:** Indicates if the contractor is going to be the one receiving the funding for any measure completed.
 - **If yes**, for HEA payment, partner to confirm trade ally signs page 3 under section C. If the contractor is to receive the HEA or measure(s) payments, they must be enrolled as Trade Allies and enrolled to offer Instant Incentives.
 - **If no**, skip Question 2a.
 - If the contractor is not the payee, select no and skip Question 2a.
- Project ID (only for Community Action Agencies or rate payer funded organizations): Confirm unique customer ID for energy savings claim.
- **Page 3:** Sign as needed (if it is a rental property, the renter signs on page 3 and the owner/landlord will sign at the bottom of page 6). The Community Partner is required to sign Form 300CPF.
- The roofing section is not required if there is not enough technical expertise/knowledge to assess it.

HOME INFORMATION AND ENERGY UPGRADES

- **Page 4** is for providing information about the home, such as the existing heating system, utilities and insulation values.
 - **IMPORTANT:** Do not enter planned upgrades—this section is for the home's current condition. This helps determine if the home is eligible for funding from Energy Trust. If unsure, please use the website [Zillow](#) to confirm information, or you can make a note at the bottom of page 4.
 - Heating Systems chart: For the chart on page 4, mark all heating sources, their function and condition.

• **Page 5 Existing Features & Safety:** Continues with providing more information about the home, but it focuses more on existing measures, such as windows and insulation, details about the roof, and potential safety and health concerns.

• **Page 6 Upgrade Considerations:**

- First column: Potential home upgrades
- Second column: Eligibility
- Third column: Homeowner's interest in specific upgrades
- Fourth column: Installation barriers; use drop down function to determine if there is any deferred maintenance preventing upgrade
- Fifth column: Referral needed to other CAA/CBO/none; indicate whether measure will be referred to another agency or organization
- Eligibility for no-cost incentives, bill discounts and/or partner referrals
- Signature from owner/property manager confirming they understand all considerations
- Any identifiable and reportable barriers that will/can prevent assessing organization or trade ally for upgrade:
 - Home repairs/differed maintenance
 - Cost
 - Other

• **Page 6 Final Signature:**

- The customer will need to sign again at the bottom of page 6 once the HEA is complete. If the home is a **rental**, the renter will sign on page 3, and the landlord/owner will sign on the bottom of page 6 if they are looking to pursue energy upgrades. If the landlord/owner is present, they can sign both page 3 and page 6.
- If the owner is not present, the HEA can still be performed, but the renter signature is still required on page 3.

• **Page 6 Referral Section:** Use this section if the customer is referred for additional energy upgrades after the HEA.

- Example: Community Partner Funding (CPF) partner Community Energy Project does the HEA, but refers the customer to another CPF partner, such as Verde, for a heat pump

BEST PRACTICES

- If pursuing a **Heat Pump Water Heater incentive**, please note what type of water heater is being replaced (electric or gas).
- If pursuing a **Heat Pump or Ductless Heat Pump incentive**, please note if it is a No-Cost project (Form 300HPQ will be needed) or a standard CPF request, as approval requests differ between No-Cost and Standard requests.
- **Take photos** of the existing systems in the home (before replacement) such as HVAC, water heating and insulation. It can be beneficial and help expedite processing and pre-approvals.