



INSULATION AND CERTA INCENTIVE REQUEST GUIDE

A STEP-BY-STEP GUIDE TO MAXIMIZING INSULATION INCENTIVES

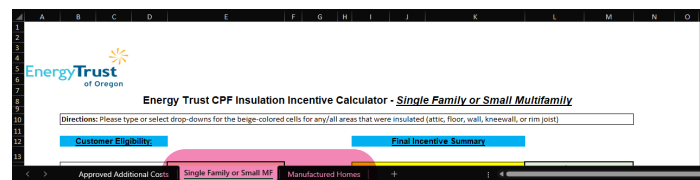
OVERVIEW

- Energy Trust offers an Excel calculator to support partners in determining incentive amounts before the work is completed and to submit alongside final incentive application materials.
- Calculator submissions are optional but support in providing transparency and assurance before the project proceeds with upgrade.
- At the end of the project, please submit a final invoice that includes:
 - R-values
 - Square footage
 - Specific areas insulated (and if insulation was removed, we'll need to know why)
 - Any incentives received (Energy Trust and any other incentive programs you may be accessing)
- Partners are always welcome to send an estimate and completed insulation calculator before moving forward with an install to ensure what level of incentive a project qualifies for. We strongly encourage and recommend you submit an estimate and insulation calculator for the first several projects, until you are comfortable with the insulation process flow.
- *This document is intended as a supplement to live trainings and office hours.*

HOW TO FILL OUT THE INSULATION CALCULATOR TOOL IN SIX STEPS

1. Select the Correct Tab

Choose the appropriate tab (highlighted in pink below) based on the home type (Single Family or Small MF, or Manufactured Home).



2. Fill Out the Customer Eligibility Section

- Select the primary heating system and participating utilities.
 - If multiple heating systems are present and you are not sure which one is considered primary, please email us to ask and confirm.
- If it is eligible, the box will turn from red to green.
- Note: The fuel type is important, as the incentive amounts change based on gas or electricity.

Customer Name:	
Customer Address:	
Housing Type:	
Electric Utility*	
*Please select 'Other/None' if electric service is not PGE or PAC	
Gas Utility	
Heating System	
Primary Heating Fuel	

1. Eligible?

3. Enter Insulation Project Details

- On the left side: Enter the square footage for each insulation type.
- On the right: Enter the total cost (including additional work).
- Confirm that each type of work is listed as a line item on the estimate/invoice, including cost per insulation type and square footage installed.

Sq. Ft. of Insulation:	
Total Installation Cost	

4. Verify Additional Work Costs

- If you are unsure if some of the additional work (such as ventilation or asbestos) can be covered in the cost, check the Approved Additional Costs tab.

5. Confirm R-Values and Eligibility

- Check the following boxes (if applicable) for each additional cost that occurred at the site.

To receive more than \$3.00/sq ft, check all additional costs below that occurred at this site

<input type="checkbox"/> Insulation Removal	<input type="checkbox"/> Drill/Fill Floorboards	<input type="checkbox"/> Ducting Work	<input type="checkbox"/> Knob and Tube Remediation
<input type="checkbox"/> Attic Venting	<input type="checkbox"/> Access / Pull-Down Stairs	<input type="checkbox"/> Mechanical Ventilation	<input type="checkbox"/> Asbestos Remediation

6. Fill Out the R-Values on the Calculator

- Fill out the corresponding R-values for each type, making sure they match the R-values listed on the bid/invoice. If they qualify, the Eligible boxes will change to green.
- If the Final R-value box is red, but the cavity was filled, make sure to select "Yes" for the "Filled cavity?" box, and the Final R-value box should change to green.
- If you've completed the sections correctly, the incentive amount per square foot and Max Energy Trust Incentive box should have auto-populated.
- If multiple forms of insulation were installed, all incentive amounts would be totaled at the top right side in the Total Energy Trust Incentive box (see pink highlight). A completed example is below.

Directions: Please type or select drop-downs for the beige-colored cells for any/all areas that were insulated (attic, floor, wall, kneewall, or rim joist)

Customer Eligibility:	Final Incentive Summary
Customer Name: John Doe	Total Energy Trust Incentive \$2,125.00
Customer Address: 123 Energy Way Portland, OR 97232	Who should receive the Energy Trust Incentive? Participating Organization
Housing Type: Detached Single-Family Home	
Electric Utility: PGE	
Gas Utility: None	
Heating System: Ducted Heat Pump	
Primary Heating Fuel: Electric	
Attic Insulation	Attic Insulation Costs:
Sq. Ft. of Insulation: 300	Total Installation Cost \$5,000.00 \$4.25 (per sq ft)
Beginning R Value: 0	*Max Energy Trust Incentive \$2,125.00
Final R Value: 40	
Filled cavity? No	

To receive more than \$3.00/sq ft, check all additional costs below that occurred at this site

<input checked="" type="checkbox"/> Insulation Removal	<input type="checkbox"/> Drill/Fill Floorboards	<input type="checkbox"/> Ducting Work	<input type="checkbox"/> Knob and Tube Remediation
<input type="checkbox"/> Attic Venting	<input type="checkbox"/> Access / Pull-Down Stairs	<input type="checkbox"/> Mechanical Ventilation	<input type="checkbox"/> Asbestos Remediation

Note: When sending in the calculator for review, sending it in the Excel format is preferred to allow for easier editing; however, a PDF is also acceptable.

ACCESSING CERTA FUNDING

- CERTA funding is an additional funding source of up to \$2,000 that all Community Partner Funding (CPF) partners have access to, in addition to Energy Trust CPF insulation incentives.
- What can CERTA funds cover, and who can access them?
 - Any enrolled Energy Trust Community Partner can access **Phase 1** CERTA funds. These funds can help cover costs connected to the insulation project only (floor, attic and wall).
 - If your organization has been approved for **Phase 2** of the CERTA funds, these funds can help cover any Phase 1 costs and can include related weatherization needs or eligible home repairs. A community partner needs to have completed five projects in which CERTA is used to cover insulation cost before being approved for Phase 2 home repairs. This is to ensure understanding on how to access CERTA funds.
 - Questions about the differences between Phase 1 and 2, or interested in Phase 2 enrollment requirements? Email cpfsupport@energytrust.org.
- When filling out Energy Trust paperwork:
 - Check the appropriate boxes near the bottom of page 8 (see below) to indicate that you want to access CERTA funds.
 - Please note that CERTA funds can only be applied once per site, cannot exceed \$2,000 per site and cannot be applied retroactively. Ensure that you mark the CERTA box on form 320CPF. Multiple insulation incentives will not result in multiple CERTA payments.

Funding Source	Requirements	Incentive												
<input type="checkbox"/> Climate Pollution Reduction Grant (CPRG) - Federal Funds	<p>An insulation measure must be selected, above. For single-family and manufactured homes. 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, if approved, for repairs enabling insulation or weatherization. Talk to your account manager for details.</p> <p>Use of funds:</p> <table><tr><td><input type="checkbox"/> Reduce Customer Cost</td><td><input type="checkbox"/> Insulation Cost Only</td><td><input type="checkbox"/> Enabling Upgrade</td></tr><tr><td><input type="checkbox"/> Ductwork</td><td><input type="checkbox"/> Electrical</td><td><input type="checkbox"/> Weatherization</td></tr><tr><td><input type="checkbox"/> Hazard Mitigation</td><td><input type="checkbox"/> Moisture</td><td></td></tr><tr><td><input type="checkbox"/> Other repair</td><td></td><td></td></tr></table>	<input type="checkbox"/> Reduce Customer Cost	<input type="checkbox"/> Insulation Cost Only	<input type="checkbox"/> Enabling Upgrade	<input type="checkbox"/> Ductwork	<input type="checkbox"/> Electrical	<input type="checkbox"/> Weatherization	<input type="checkbox"/> Hazard Mitigation	<input type="checkbox"/> Moisture		<input type="checkbox"/> Other repair			Total Enabling/Repair Cost: \$ Incentive Request: \$
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<input type="checkbox"/> Other repair														

- You may request an initial eligibility review and incentive estimate before insulation work is completed. To do so, please note this request in the body of your email and send it to cpfsupport@energytrust.org.
- Note: CERTA funds will be automatically applied to an insulation project if there is any remaining cost after the CPF insulation incentive is applied.

▫ **Trade ally payments (Phase 2):** CERTA funds cannot be released until confirmation of the insulation project is submitted (320CPF, insulation portion). If a participating organization is using two separate trade allies to complete insulation upgrade(s) and home repair, payment of the CERTA home repair will be released after confirmation of an insulation upgrade. This may result in a delay if home repair needs to be done before insulation. Please work with both trade allies to understand project timelines so both upgrades can be completed in the same time frame to ensure payment is released around the same time for both trade allies (4-6 weeks). If using one trade ally to complete both insulation and home repair, the trade ally should bill for both upgrades and label each line item as “insulation” or “CERTA home repair.”