



# HOMES and HEAR

## IMPLEMENTATION PARTNER FAQs

AN OREGON DEPARTMENT OF ENERGY HOME ENERGY REBATE PROGRAM  
DELIVERED BY ENERGY TRUST OF OREGON

### PROGRAM OVERVIEW AND PARTICIPATION REQUIREMENTS

#### What are HOMES and HEAR?

The Home Efficiency Rebates (HOMES) program and the Home Electrification and Appliance Rebates (HEAR) program are the Oregon Department of Energy's (ODOE's) Home Energy Rebate programs, which represent an investment in Oregon's households through rebates to cover a large portion of the up-front cost of making energy efficiency upgrades and installing efficient appliances for Oregonians. Energy Trust of Oregon will deliver the programs in areas served by investor-owned utilities (IOU). Investor Owned Utilities are, Portland General Electric, Pacific Power, Northwest Natural, Cascade Natural Gas, and Avista.

#### How much funding is available for HOMES and HEAR incentives, and how long will it be available?

The U.S. Department of Energy awarded ODOE over \$113 million for the HOMES and HEAR programs. Funding for these programs comes to Oregon thanks to the 2022 Inflation Reduction Act.

Energy Trust will be implementing approximately \$25 million for HOMES and \$25 million for HEAR. Specific amounts will be allocated to different housing segments and income categories to ensure the funding is distributed equitably throughout the investor-owned utility territory we serve.

#### What is the expected timeline for program launch, training availability and full operational readiness?

HOMES and HEAR Home Energy Rebate programs will launch in phases beginning spring 2026. In the meantime, Energy Trust is diligently planning a training curriculum to onboard trade allies and community-based organizations (CBOs) to deliver these offers to customers when they are available. Trainings are slated to begin in spring 2026 and will continue to be available on a rolling basis for contractors who desire to enroll. This schedule is subject to change and pending U.S. Department of Energy (DOE) approval.

#### How can contractors participate in HOMES and HEAR?

Contractors can enroll to participate as a HOMES and HEAR in-network provider by enrolling as an Energy Trust trade ally and then registering to join the HOMES and HEAR contractor networks. The details about these networks and more information about how to sign up will be released soon.

#### How can CBOs participate in HOMES and HEAR?

Energy Trust is seeking to collaborate with CBOs located within IOU territory that can support implementation in their current service territory to priority communities. Energy Trust will release an RFQ in early 2026 with more details about participation options, the role of CBOs and benefits.

### How will customers know if they need to work with a contractor or a CBO?

Customers must work with an approved contractor when installing HVAC, air sealing and any electrical work. Energy Trust also recommends working with a contractor when installing a heat pump water heater, insulation and/or appliances. However, customers can install the latter items themselves if they get preapproval when enrolling and follow the HOMES and HEAR installation manual requirements.

CBOs have direct ties to community members and offer the ability to work closely with customers who need support understanding the program and navigating qualification and submission processes. If you are uncertain about the role of a CBO or would like support from a CBO for a customer, you can reach out to your program contact.

### Can both contractors and CBOs support income verification and paperwork navigation?

Yes, contractors and CBOs can support income verification and paperwork navigation. Both groups will receive special training to help customers through these steps, with CBOs receiving additional training in managing projects on behalf of the customer.

### How will contractors and CBOs be notified of program updates, changes or federal guidance adjustments after the program launches?

A variety of communication methods will be used to keep contractors informed of program updates. Sign up for the email distribution list for notification of milestones like registration opening and training kicking off. As we approach program launch, there will be a dedicated HOMES and HEAR phone number.

### Will Energy Trust notify contractors and CBOs as incentive budgets decline or approach depletion?

HOMES and HEAR programs require project reservations. The program will monitor incentives spent in both programs and provide updates via INSIDER, email communication and direct communication to enrolled trade allies when incentives reach 20% depletion.

### Can funding be withdrawn from projects that have already begun?

Funding is only available for projects that have been completed and for which all required project documentation has been approved. Energy Trust will issue a check for reimbursement within 28 days of receiving completed project documentation.

### How can contractors ensure we are not overpaying for project costs or reimbursing more than allowed?

Participating contractors will have training that covers invoicing requirements. This training will review documentation required on an invoice such as providing total project cost and line-itemed incentive reductions to the customer. Each project and invoice is reviewed by a program specialist who will contact the participating contractor should the expected reimbursement not align with the program requirements.

#### QUESTIONS ABOUT PARTICIPATION OPTIONS?

Email us at [contact@energytrust.org](mailto:contact@energytrust.org) or call 866.368.7878.



## INCOME VERIFICATION AND CUSTOMER PRIVACY

### How will customers apply for HOMES and HEAR?

Customers will submit a pre-application through an ODOE online portal that will qualify their income and site eligibility and assign them to the appropriate implementor (Energy Trust or Earth Advantage) based on their location. Once the pre-application is approved contractors will be able to submit a project application through the online portal. This portal is currently under development. Information about navigating the portal will be included in trainings for registered trade allies and CBOs.

### How will income verification work?

The Inflation Reduction Act set minimum household income eligibility guidelines for states to follow for both rebate programs. To meet these guidelines, program participants must demonstrate their income eligibility to receive rebates designated for low- and moderate-income households.

Potential applicants will be able to demonstrate their income eligibility through one of two pathways.

The first pathway will require all income earners in a household to submit tax transcripts from the most recent tax filing year, and the summation of this income must be less than the amount listed in the income table for that household size and county. To order a tax transcript, customers may call the Oregon Department of Revenue at 503.378.4988, visit any Oregon Department of Revenue location in person or visit <https://www.irs.gov/individuals/get-transcript>.

The second pathway is through categorical eligibility, where at least one member of the household provides official documentation of participation in a pre-qualifying program.

### Can customers use alternative income verification besides submitting tax transcripts?

Yes, there will be a list of categorical eligibility programs that a customer can use to verify their income. If a customer can demonstrate current participation in one of these programs, this proof can substitute income verification documentation.

### How will digital access challenges be addressed for customers who lack internet or comfort with technology?

Customers who lack access can contact their local participating CBO who may be able to work with the customer to submit information on their behalf. Customers can also contact Energy Trust's call center, which can help them navigate the online system.

### How will the program support immigrant communities with clear, culturally relevant information so they can confidently participate?

Energy Trust is working closely with CBOs that already have trusted relationships within immigrant communities to educate them on program requirements and provide the resources they need to support community participation. CBOs will play a central role in helping households understand the programs, navigate requirements and access the support they need. Energy Trust will train CBOs to help them understand program requirements and to guide community members in the direction most beneficial to them.

### What participant data is required to determine eligibility?

The program verification process requires income verification and information about the home. It does not ask about demographic or citizenship information. All information collected in the verification process is stored on a secure server. Although states must retain all program data in the application platform for at least three years following the programs' completion, the information is aggregated without personally identifying information. This anonymized information will be analyzed and used to inform state energy reporting and assessment.

### How is income verification handled for point-of-sale appliance rebates?

Income verification for both HOMES and HEAR is handled identically for all rebate options. A customer enters their income information or proof of participation in an eligible low-income program into ODOE's online portal. Customers participating in HEAR will be provided with a reservation to purchase the equipment and then be reimbursed the incentive amount either at time of purchase, at a participating retailer or within 28 days after providing proof of purchase to the program portal.

### How will funds be equitably distributed throughout Oregon?

Energy Trust's program aims to distribute funds to all investor-owned utility territories through working with a combination of local CBOs and regional outreach managers and following the required regional budget allotment.

### How should organizations talk to customers about the possibility that project scope changes could affect rebate eligibility?

Because all projects require a reservation, if the approved invoice is followed, the customer will receive a rebate. If the contractor needs to make a change due to an installation issue, the revision process will require the rebate to be re-reserved. It is the contractor's responsibility to maintain communication with the customer and work with their program contact to update the necessary documentation.

### What guidance will be provided to help customers decide whether HOMES or HEAR is the best fit?

Contractors and CBOs will receive training to understand the benefits of HOMES vs. HEAR and how to guide customers toward the best offering for them. Educational resources and other guidance materials targeting customers will also be available on the programs' website.

### Is there a centralized place where customers can see all available incentives across programs?

Yes, there will be a centralized website that shows all available incentives when we are closer to program launch.

### Can HOMES and HEAR incentives stack with Energy Trust incentives?

Yes, HOMES and HEAR incentives can stack with existing Energy Trust incentives. Energy Trust will train contractors and CBOs to help them understand how this works.

#### HAVE MORE QUESTIONS?

Email us at [contact@energytrust.org](mailto:contact@energytrust.org)  
or call 866.368.7878.

