

# Incentive Processing Workshop

## Fall 2024 Trade Ally Forums

**Residential Heating and Cooling Incentives, Contractor Install** EnergyTrust of Oregon  
**Residential Incentive Application | Form 320-RRAC**

Want your incentive faster? Apply online. Visit [www.energytrust.org/nw](http://www.energytrust.org/nw)

**Steps to completion:**

- 1 Make an energy saving improvement in a qualifying residence.
- 2 Complete application information, including contractor and customer signatures. Invoices being the customer for purchase and installation marked "Trade Ally" for Energy Trust Trade Ally's submitting this as an instant incentive project. Invoice billing the customer must show incentive deductions.
- 3 Submit online form of mail, fax or email communication together to Energy Trust of Oregon Residential, 618 SW 2nd Ave, #215 Portland, OR 97201 1.888.311.1522 phone 1.888.516.7562 fax [info@energytrust.org](mailto:info@energytrust.org)
- 4 Receive your check. Please allow two to six weeks for incentive processing after completed application and supporting documentation are received.

**Need-to-know information:**

- This form should be completed by the Contractor and Customer.
- 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.

**Customer Information**

This home is  Owner occupied  A rental property I own  
 \*If the home is a rental property, and the owner or manager is receiving the incentive directly, a complete, accurate, and verifiable W-9 is required. Visit [www.energytrust.org/w9](http://www.energytrust.org/w9)

City State Zip  
 Site address City State Zip  
 Mailing address (if different than site) Home Work Cell  
 Primary phone Home Work Cell Other Phone Home Work Cell Other

**Utility Information**

Electric utility:  PGE  Pacific Power  Other  
 NW Natural  Cascade Natural Gas  Avista  Other

**Site Information**

Square feet Number of levels  
 Year built  Electric furnace  Ductless heat pump  Wood  
 Electric baseboard  Gas furnace  Propane  
 Ducted heat pump  Gas fireplace  Other  
 Natural gas  Propane  
 Water heating fuel  Electricity  Crawlspace w/ vapor barrier  
 Combobathrooms combo  Slab on grade  
 Full basement  Stair on grade  
 Foundation/basement  Full basement  Rowhouse  Townhouse  
 Split level  Manufactured  Fourplex  
 Home type (Oregon)  Single-family  Duplex  Triplex  Fourplex  
 Manufactured  Yes Instant incentive \$ amount listed on invoice  
 Are you an Energy Trust trade ally submitting this as an instant incentive project?

**Customer Name and Signature**

By signing below, Customer agrees to the terms and conditions of this application and authorizes Contractor identified below to submit this application and all supporting invoices and 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 accompanying documentation is complete and accurate. If Customer identifies as a landlord or property owner applying for a single-family rental property incentive, Customer understands and agrees that Energy Trust will issue incentive check processing. Incomplete information will result in delayed payment or disqualification. If identified as an Energy Trust requirements to the Contractor and Customer is responsible for paying the remaining balance of the invoice for incentives that meet Energy Trust requirements.

Full name (please print and use same name as on invoice) Date  
 Customer signature  
 Customer email address (application status updates are sent via email)

**Contractor Name and Signature**

By signing below, Contractor certifies that this application and all accompanying documentation is complete and accurate, and all upgrades associated with this incentive request were completed as of the signature date below. Incentives are payable to Customer only unless part of an instant incentive project. Incentive amounts identified as an instant incentive project. Contractor has shown instant incentive amounts listed above as Instant Incentive Agreement - Instant Incentive. To receive incentives, all work must comply with the Residential Specifications Manual and all other Energy Trust program requirements.

Full name (please print) Date  
 Contractor signature  
 OCC# or Washington License # (Non-trade ally only)  
 Contractor company  
 Eligible upgrades and incentives subject to change. Do not use this form for work completed after December 31, 2024.

Form 320C-RRAC v2024.6 2/20/2025 - Page 1 of 6



**Multifamily Weatherization Incentives** EnergyTrust of Oregon  
**Existing Multifamily Incentive Application | Form 320-WX**

To be completed by Participant  
 TRC is a Program Management Contractor for Energy Trust of Oregon.

**Who can apply:**

Incentives are available for new, qualifying natural gas and electric energy-saving equipment installed at existing multifamily property in Oregon. Electric customers of Portland General Electric or Pacific Power can apply for incentives for qualifying electric equipment, and schedules of NW Natural, Cascade Natural Gas or Avista can apply for incentives for qualifying natural gas equipment. Additional requirements apply; see Terms and Conditions for details.

**Steps to completion:**

- 1 Install a qualifying energy efficiency improvement.
- 2 Complete application information and provide required supporting documentation, including:
  - W-9 for owner, if applicable
  - Invoice(s) for project and Manufacturer spec sheet(s)
- 3 Submit form by fax, email or mail along with supporting documentation to: Energy Trust of Oregon Existing Multifamily, 111 SW Columbia St, Suite 945 Portland, OR 97201 1.877.510.2131 phone 503.241.1164 fax [multifamily@energytrust.org](mailto:multifamily@energytrust.org)
- 4 Receive your check. Please allow six to eight weeks for incentive processing after complete application is received.

**What you need to know:**

- Energy Trust must receive applications within 60 days from equipment purchase and install.
- Incomplete information will result in delayed payment or disqualification of the incentive.
- A post-verification installation may be required to receive payment.
- Use **Form 320WVAC, 320WVAC, or 320WVAC** for other Existing Multifamily upgrades.

**Energy Trust Use Only** Project ID: \_\_\_\_\_ PT ID: \_\_\_\_\_ Promo Code (Optional): \_\_\_\_\_

**Interventive limits apply; see Terms and Conditions**

**Property Owner**

Legal Name of Property Owner  
 Contact Name  
 Mailing Address (the "Participant")  
 City State Zip  
 Phone Email  
 Property Ownership  Work  Cat  Investment Owner  Individual Unit Owner  Occupied by  Owner  Tenant

Is this property used for rental income?  Yes  No (if you checked Yes, a W-9 is required for payment)

**Property Representative (Skip section if you are an individual unit owner)**

Company Name  
 Contact Name  
 Mailing Address  
 City State Zip  
 Phone Email

**Property Information**

Property Name  
 Address  
 City State Zip  
 Number of Buildings Number of Units Number of Bldg Levels  
 Year Built Total Sq. Ft. of Buildings or Unit  
 Market  Affordable Housing  Campus Living  Asst. Living/Retirement  
 Market Rate  HOA  
 Building Style  Low-Rise (1-3 stories)  Duplex  Individual Unit Owner  
 Mid-Rise (4-8 stories)  Triplex  Townhouse/Rowhouse  
 High-Rise (9 or more stories)  Fourplex  Other  
 Electric Utility  PGE  Pacific Power  Gas Utility  NW Natural  Cascade Natural Gas  Avista  Other  
 Other

**Space Heating (check all that apply)**

Electric (select system type)  
 Ducted Heat Pump  Ductless Heat Pump  Gas (select system type)  
 Wall Heater  PTIP  Furnace  Central Boiler  
 Baseboard  Other  Other

**Water Heating (check all that apply)**

Electric -OR-  Gas

Form 320WVAC v2024.4 v2/20/25 - Page 1 of 6  
 Need Help Filling out this form? Call the Program at 1.877.510.2130



## Session Format

- Four pods throughout the room with staff from each Energy Trust program
- Each pod has Energy Trust staff knowledgeable about application processing – look for staff with blue Energy Trust shirts
- Each pod has printed sample applications and handouts to take with you or walk through with staff members
- This is an open session: Feel free to move between pods to ask questions, walk through applications, or discuss trade ally benefits

## Objectives

- Get answers to your tough questions.
- Gain a better understanding of how to complete incentive applications and avoid delays.
- Share challenges and recommended improvements.
- Take advantage of the expertise in the room – our colleagues are here to help.

Podium  
Front of Room

Multifamily

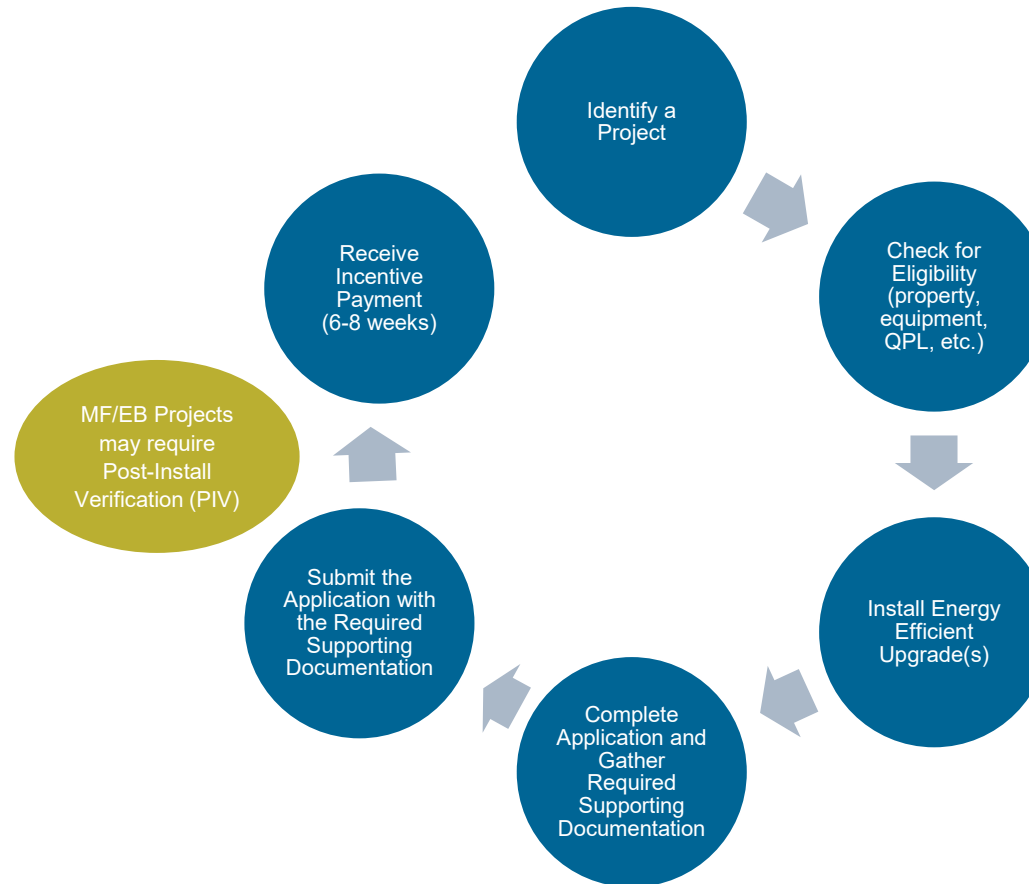
Trade Ally  
Network  
Benefits

Existing  
Buildings  
(commercial)

Residential  
(Home  
Retrofit)

Multifamily

## Digging Deeper: Commercial & Multifamily Standard Incentive Workflow



## Slide 6

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**CS0** @Heath I recommend having these as print outs at the Existing Buildings and Multifamily station. That way staff have something to take away.

Cameron Starr, 2024-09-27T21:05:35.826

# Digging Deeper: Standard Incentive Applications

## Use the correct form:

All found on Energy Trust website: [www.energytrust.org](http://www.energytrust.org)

- Multifamily Incentives

AM1

- OR Multifamily Weatherization: Form 320WX
- OR Multifamily Appliance: Form 320APP
- OR Multifamily HVAC: Form 320HVAC
- OR Multifamily Water Heating: Form 320WH
- OR Assisted Living/Campus Living Foodservice Equipment: Form 320F
- SW WA (*Large MF*): Forms 120P-WA-EMF (existing) and 120P-WA-NMF (new)

- Commercial Incentives

AM0

- All Incentives for Oregon: Form 120P
- All incentives for SW WA: Forms 120P-WA-EB (existing) and 120P-WA-NB (new)

## Please note...

- The Existing Buildings program covers **NEW BUILDINGS** in Southwest Washington
  - Only projects in NW Natural territory
  - Project must be behind a commercial meter





## Slide 7

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**AM0** Should a bullet be added for small MF in WA handled by CLEAResult?

MacMurchy, Andrea, 2024-09-16T17:10:15.999

**AM1** Web pages will be re-designed by the Forum, may need to list out where to find the forms (Forms page for mf and one for EB still?)

MacMurchy, Andrea, 2024-09-16T18:17:41.266

## Digging Deeper: Standard Incentive Eligibility

### Work with your dedicated trade ally coordinator (TAC)

- Every trade ally (TA) has a dedicated TAC
- Each TAC assists TAs in their assigned territory
- We have TACs covering all parts of the state
- Their job is to:
  - Keep you informed of program updates and changes
  - Assist you as you learn to fill out and turn in incentive applications
  - Answer/ask questions about your project and direct it to where it “sorts”
  - Connect you with the right energy advisor if your project is beyond standard scope
  - Connect you with engineers on deeply technical questions around eligibility
- **Remember:**
  - TACs are a great resource – use them!
  - If they call/text/email, call them back – they can’t help if you don’t!

### Call or email us with eligibility or incentive questions

- 1-877-510-2130 Multifamily
- 1-866-605-1676 Existing Buildings



# Digging Deeper: Standard Incentive Application



**Multifamily Heating, Ventilation and Cooling Incentives**  
Existing Multifamily | Incentive Application | Form 320<sub>HVAC</sub>

**EnergyTrust**  
of Oregon

To be completed by Participant  
TRC is a Program Management Contractor for Energy Trust of Oregon.

Energy Trust Use Only	Project ID	PT ID	Project Code (Optional)
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Incentive limits apply; see Terms and Conditions

**Property Owner**  Payee  
Legal Name of Property Owner (the "Participant")  
Contact Name Title  
Mailing Address  
City State Zip  
Phone  Work  Cell Email  
Property Ownership  Investment Owner  Individual Unit Owner Occupied by  Owner  Tenant  
Is this property used for rental income?  Yes  No *If you checked Yes, a W-9 is required for payment.*

**Property Representative** (Skip section if you are an individual unit owner)  
Company Name  
Contact Name Title  
Mailing Address  
City State Zip  
Phone  Work  Cell Email

**Property Information**  
Property Name  
Address  
City State Zip  
Number of Buildings Number of Units Number of Bldg Levels  
Year Built Total Sq. Ft. of Buildings or Unit  
Market  Affordable Housing  Campus Living  Asst Living/Retirement  Market Rate  HOA  Individual Unit Owner  
Building Style  Low-Rise (1-3 stories)  Duplex  Townhouse/Rowhouse  Mid-Rise (4-8 stories)  Triplex  Other  High-Rise (9 or more stories)  Fourplex  
Electric Utility  PGE  Pacific Power  Gas Utility  NW Natural  Cascade Natural Gas  Avista  Other  None

**Space Heating** (check all that apply)  
 Electric (select system type)  Ducted Heat Pump  Wall Heater  Furnace  Baseboard  Gas (select system type)  Ductless Heat Pump  PTHP  Other  Central Boiler  Furnace  Other

Form 320<sub>HVAC</sub> v2024.4 v240715 – Page 1 of 13 Need Help Filling out this form? Call the Program at 1-877-510-2130

**Property Owner:** This is the information for the property owner (participant).

**Property Representative:** Only complete when working with property manager (optional).

- Property Information:**
- Property name/address
  - Building Style (important)
  - Space and/or Water Heating System

**Utility Provider:** Must be customer of PGE, Pacific Power, NW Natural, Cascade Natural Gas, or Avista – for the measure they are installing

## Slide 9

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**AM0** I replaced the 120P with the 320HVAC example  
MacMurchy, Andrea, 2024-09-17T01:43:13.602

# Digging Deeper: Standard Incentive Application

## To Fill Out the Incentive:

1. Locate the incentive for your project – for multifamily projects check the property type subheading (some incentives are only available for certain property types)
2. Check the requirements to make sure your project qualifies (verify all details on QPL, EnergyStar.gov or AHRI, if it's a requirement)
3. Fill out the installed cost and quantity cells
  - The incentive total should auto-populate
  - Providing this allows us to double check Measure & Quantities with Invoice
  - Fill out the other fields listed (manufacturer, model, equipment replaced)

### Heat Pump Incentives, continued

► For side-by-side or duplex, triplex, fourplex properties only

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
<b>Ducted Heat Pump</b> <input type="checkbox"/> \$1,000 per unit	<ul style="list-style-type: none"> <li>• Equipment must be at least 7.50 HSPF2*</li> <li>• Must replace electric forced air furnace as primary heat source</li> <li>• Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives</li> <li>• Energy Trust recommends electric auxiliary heat be locked out by thermostat at 35°F or per manufacturer's recommended energy saving setting</li> <li>• Thermostat must either have outdoor temperature sensor or be a qualified web-enabled model that is connected to the internet.</li> <li>• Replacing an existing heat pump does not qualify</li> </ul>	Manufacturer: _____ Model: _____ Equipment Replaced: _____	\$		\$ 0.00



# Digging Deeper: Standard Incentive Application

## Option to Assign Payment:

- You and the participant must both sign Form 320A (multifamily projects)
- You must show proof of the discount on the participant's invoice
- After project completion submit the incentive application *and* Form 320A
- After all project documentation is received expect payment within 6-8 weeks



**Multifamily Projects:  
Submit MF Application  
+ Form 320A**

**Existing Buildings Projects:  
Submit 120P Application  
+ complete the Option to  
Assign Payment page**

Participant Signature

Payee (TA) Signature

**Assign Payment**  
Existing Multifamily | Standard Incentive Applications | Form 320A

EnergyTrust  
of Oregon

To be completed by Participant  
TRC is a Program Management Contractor for Energy Trust of Oregon.

To authorize payment of the Energy Trust incentive to your contractor or another designated payee, both the Participant and Payee must sign and submit this **Form 320A: Assign Payment** along with the applicable Existing Multifamily standard incentive application (**Form 320APP, 320F, 320HVAC, 320WH, or 320WX**).

**Option to Assign Incentive Payment**  
**PLEASE NOTE:** The Energy Trust incentive payment will be made to Participant unless Participant and its designated Payee complete the section below to assign the payment to Payee. A complete, accurate and verifiable **IRS Form W-9** (Request for Taxpayer Identification Number and Certification) for the Payee named below must be provided if this option is selected.

SITE ADDRESS			
Street Address	City	State	Zip

**PARTICIPANT NAME AND SIGNATURE**

Both Participant and Payee understand and agree that if this Option to Assign Incentive Payment is selected the incentive check will be issued to the Payee named below at the address listed below and Energy Trust is not responsible for any tax liabilities that may be associated with the incentive payment. In addition, Participant understands that, notwithstanding this assignment, responsibility for complying with the terms and conditions of this incentive agreement shall continue to be the obligation of Participant, and Energy Trust's sole responsibility under this incentive agreement shall be to Participant. Accordingly, Payee understands that it shall have no rights against Energy Trust or the PMC with respect to such assignment or the payment of the incentive, and in the event that Energy Trust does not pay the incentive as a result of Participant's failure to comply with this agreement, Payee's sole recourse shall be against Participant. Participant directs Energy Trust to pay any incentive to which it is entitled to the Payee named below and waives all rights to directly receive the Energy Trust incentives for the identified energy-efficiency project.

**SIGNATURES:** By my signature below, I represent to Energy Trust that I have read this agreement and am duly authorized to sign this Option to Assign Incentive Payment on behalf of the party for whom I am signing.

Participant Authorized Representative <small>(printed)</small>	<small>(signature)</small>	Date
Participant Name <small>(must match legal name of Property Owner listed as the "Participant" on associated incentive application)</small>		

**PAYEE NAME AND SIGNATURE (Check Recipient)**

Payee Authorized Representative <small>(printed)</small>	<small>(signature)</small>	Date	
Payee Name <small>(must match submitted IRS form W9)</small>			
Mailing Address for Check	City	State	Zip
Phone	<input type="checkbox"/> cell <input type="checkbox"/> home <input type="checkbox"/> work <input type="checkbox"/> Email		

## Digging Deeper: Standard Incentive Application

### To Submit a Completed Incentive Application:

- Verify these steps to ensure application packet is complete
  - Install is complete
  - Application is complete, signed and includes supporting documentation
    - Applicable measure/equipment section completed
    - Manufacturer specifications sheet(s) are included \*
    - Itemized invoice(s) is/are included
    - W-9 for payee is included, if applicable
    - If TA is receiving payment, include signed Form 320A (multifamily) or Option to Assign Payment section (Existing Buildings)
- If everything is in order, submit application packet to Energy Trust
  - DocuSign and email are most reliable
    - Multifamily: [multifamily@energytrust.org](mailto:multifamily@energytrust.org)
    - Existing Buildings: [existingbuildings@energytrust.org](mailto:existingbuildings@energytrust.org)
  - Can also submit via USPS or fax
  - Program email, mailing address, and fax number are all located in the “Steps to Completion” section on page 1 of the application

*\*It's helpful to include AHRI or EnergyStar certification, if applicable*



Residential



# Single Family Residential Incentive Processing



Residential Single Family Homes program covers:

- Stand Alone / Site Built Homes – OR and SWWA
- New and Retrofit Manufactured Homes
- Stand Alone Auxiliary Dwelling Units (ADU) used as a living space.
- Small MF WA



Heating and Cooling

- Heat Pump
- Ductless Heat Pump
- Extended Capacity Heat Pump
- Gas Furnace
- Gas Fireplace



Weatherization

- Windows
- Insulation



No Cost and Promo

- CPF (Community Partner Funded)
- In Home Energy Services
- Regional Promotions

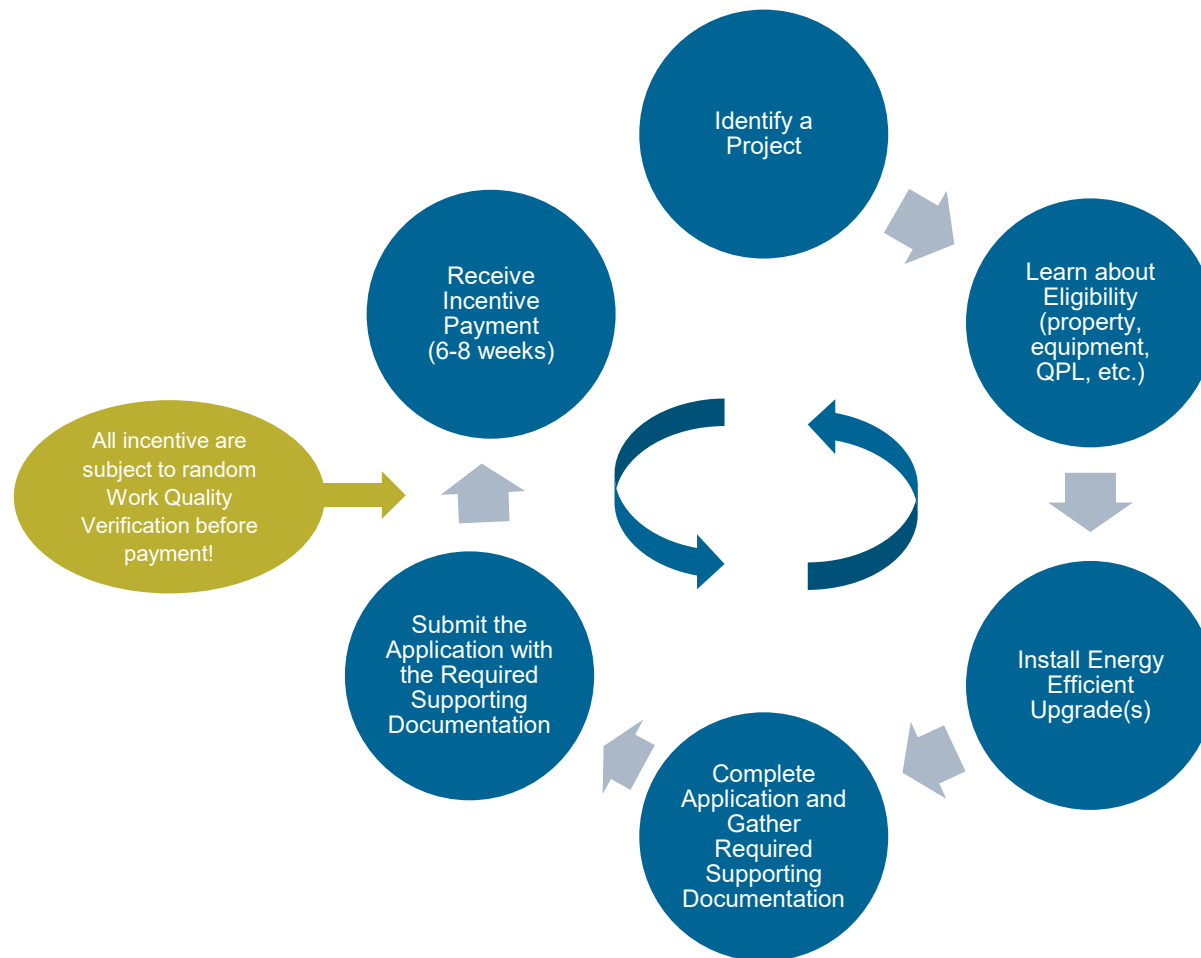


Manufactured Homes

- No Cost Services
- Replacement MH
- New MH



# Digging Deeper: Residential Incentive Workflow



## Digging Deeper: Residential Incentive & Payment Types

### General Incentives

- These are **customer paid** incentives.
- Can be paid to Owner-Occupant or an Owner of a Rental property.

### Instant Incentives

- These are given to the customer as an **incentive discount on an invoice**.
- The check or EFT is paid to the Trade Ally.

### Retail / Direct Ship

- These are in-store discounts for retail purchases.
- Can also come in the form of incentive bundled into an online purchase of Smart Thermostats via Energy Trust web storefront.



# Digging Deeper: Standard Incentive Applications

## Use the correct form:

All found on Energy Trust website: [www.energytrust.org/forms/](http://www.energytrust.org/forms/)

- Single Family Residential Incentive Forms
  - **320C-WX / 320C-WXWA** – Weatherization. Includes window and insulation incentives for OR and WA
  - **320C-HVAC** – Heating and Cooling. Includes HVAC and Thermostat incentives
  - **320ECHP** – Extended Capacity Heat Pump incentive
  - **320S** – Includes all incentive measure eligible to be self-installed. Attic and Floor insulation and Smart Thermostats
  - **320WH** – Includes the Oregon and Washington Gas Tankless Water Heater incentives
- Specialized forms – These are provided via Account Manager
  - **320SWR/321SWR** – Savings within Reach incentives and Income Requirement form
  - **350CC** – Customer Consent form for Instant Incentives
  - **300HPP/300RHP/320KL/300GIN** – Promo and Regional forms

## Please note...

- The Single Family Residential covers **Small Multifamily units** in SW WA
  - Only projects in NW Natural Gas territory and only Gas-based incentives.
  - These are 2-4 side by side units, and stacked units no more than 2x2.
  - Regular WA forms and Incentives can be used.
  - This excludes large multifamily properties – if you are unsure, connect with your AM



# Digging Deeper: CPF and IES Workflow

## Community Partner Funding (CPF)

- Community Partner (CP) identifies customer in need
- CP conducts home energy assessment (HEA)
  - Submits HEA to community partners queue for processing
- CP Identifies trade ally to complete installation of identified upgrade(s)
- Trade ally submits 320CPF form and supporting documents to [communitypartners@energytrust.org](mailto:communitypartners@energytrust.org) for processing

## In Home Energy Services (IES)

- Customer is identified via referral or online ductless heat pump questionnaire
- IES team contacts customer to schedule home energy assessment
- IES team visits home and conducts HEA
  - Submits HEA to community partners queue for processing
- IES team Identifies trade ally to complete bid of identified upgrade(s) including any critical repairs
  - If approved, trade ally will submit bid to customer for approval and signature, once signed installation may begin
- Trade ally submits 320IES form and supporting documents to [InHome@energytrust.org](mailto:InHome@energytrust.org) for processing



# Digging Deeper: Accounts Managers and Contacts

## Work with your dedicated Account Manager (AM)

- Every Trade Ally (TA) has a dedicated **AM**
- Each **AM** assists TAs in their assigned territory
- We have **AMs** covering all parts of the state
- Their job is:
  - Keep you informed of program updates and changes
  - Assist you as you learn to fill out and turn in incentive applications
  - Answer/ask questions about your project and direct to where it “sorts”
  - Connect you with the right Energy Advisor if your project is beyond standard scope
  - Work with you on issues surrounding payments or eligibility
  - Helps get you started on Specialized offerings (Instant incentives, Savings Within Reach, Promo, Regional)



## Call or email the program with eligibility/incentive questions

- 1-866-311-1822 - Energy Trust Residential program
- Emails:
  - [Residential@energytrust.org](mailto:Residential@energytrust.org) - General incentive inquiries or project status checks.
  - [ResidentialTA@energytrust.org](mailto:ResidentialTA@energytrust.org) – General program questions regarding being an active Trade Ally.
  - [Ally.Enrollment@energytrust.org](mailto:Ally.Enrollment@energytrust.org) – Account management, enrolling in services and specialties, name or address changes, changes with W9 information.
  - [TAFax@energytrust.org](mailto:TAFax@energytrust.org) – Certificates of insurance and Participation Agreements (PA)
  - [Residentialforms@energytrust.org](mailto:Residentialforms@energytrust.org) – New submissions for standard incentives
  - [Residentialmi@energytrust.org](mailto:Residentialmi@energytrust.org) – Missing information correspondence
  - Unsure where to send paperwork? The application will say at the bottom.



# Digging Deeper: Standard Incentive Application



Residential Heating and Cooling Incentives, Contractor Install  
Residential | Incentive Application | Form 320C-HVAC

EnergyTrust  
of Oregon

**Want your incentive faster?**  
Apply online.  
Visit [www.energytrust.org/now](http://www.energytrust.org/now)

**Steps to completion:**

- 1 Make an energy saving improvement in a qualifying residence.
- 2 Complete application information, including:
  - Contractor and customer signatures
  - Invoices billing the customer for purchase and installation marked "Paid in full"
  - For Energy Trust trade allies submitting this as an instant incentive project.
    - Invoice billing the customer must show incentive deductions
- 3 Submit online form or mail, fax or email documentation together to:  
Energy Trust of Oregon  
Residential  
818 SW 3<sup>rd</sup> Ave, #215  
Portland, OR 97204  
1.866.311.1822 phone  
1.866.516.7592 fax  
[residentialforms@energytrust.org](mailto:residentialforms@energytrust.org)
- 4 Receive your check. Please allow four to six 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 90 days from the date of installation.
- All information must be completed for processing; incomplete information will result in delayed payment or disqualification.

**Customer Information**

This home is  Owner occupied  A rental property I own\*  
\*If the home is a rental property, and the owner or manager is receiving the incentive directly, a complete, accurate, and verifiable W-9 is required. Visit [www.energytrust.org/w9](http://www.energytrust.org/w9).

Site address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Mailing address (if different than site) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Primary phone  Home  Work  Cell \_\_\_\_\_ Other Phone \_\_\_\_\_  Home  Work  Cell \_\_\_\_\_

**Utility Information**

Electric utility:  PGE  Pacific Power  Other \_\_\_\_\_  
Gas utility:  NW Natural  Cascade Natural Gas  Avista  Other \_\_\_\_\_

**Site Information**

Year built	Square feet	Number of levels
Primary heating system (check one)	<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"/> Wood <input type="checkbox"/> Propane <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 (Oregon): <input type="checkbox"/> Single-family <input type="checkbox"/> Manufactured <input type="checkbox"/> Duplex	Home type (Washington): <input type="checkbox"/> Single-family <input type="checkbox"/> Manufactured <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex	<input type="checkbox"/> Rowhouse <input type="checkbox"/> Townhouse

Are you an Energy Trust trade ally submitting this as an Instant Incentive project?  Yes, instant incentive amount listed on invoice: \$ \_\_\_\_\_

**Customer Name and Signature**

By signing below, Customer agrees to the terms and conditions of this application and authorizes Contractor identified below to submit this application and all required invoices and 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 accompanying documentation is complete and accurate. If Customer identifies as a landlord or property owner applying for a single-family rental property incentive, Customer affirms that they own and do not reside in the property. If identified as an Energy Trust instant incentive project, Customer understands and agrees that Energy Trust will issue incentive check for incentives that meet Energy Trust requirements to the Contractor and Customer is responsible for paying the remaining balance of the invoice.

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

Customer email address (application status updates are sent via email) \_\_\_\_\_

**Contractor Name and Signature**

By signing below, Contractor certifies that this application and all accompanying documentation is complete and accurate, and all upgrades 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 print) \_\_\_\_\_ Date \_\_\_\_\_

Contractor company \_\_\_\_\_ OCCBF or Washington License # (Non-trade ally only) \_\_\_\_\_ Install date \_\_\_\_\_

Form 320C-HVAC v2024.6 240826—Page 1 of 8 Eligible upgrades and incentives subject to change.

**Property Type:** Is the home Owner-Occupied or a Rental?

**Property Information:**

- Property name/address
- Details such as Sq Ft, Year Built, Foundation Type
- Space and/or Water Heating System

**Utility Provider:**

Must be customer of PGE, Pacific Power, NW Natural Gas, Cascade Natural Gas, or Avista – for measure they are installing

**Signatures:**

Any application submitted by a Trade Ally will need a customer's signature.

# Digging Deeper: Standard Incentive Application

## To Fill Out the Incentive:

1. Locate the incentive for your project (some incentives are only available for certain types of single family home! Ex. Site Built vs Manufactured Homes)
2. Check the requirements to make sure your project qualifies (verify all details on QPL, EnergyStar.gov or AHRI if it's a requirement)
3. Fill out the installed cost and quantity cells
  - Fill out the other fields listed (manufacturer, model, equipment replaced)
  - **Importantly: The make, model, previous system, beginning and ending requirements, total sq ft (when applicable to individual incentives) should always be filled out.**

Ducted Heat Pump Incentives <small>Residence must be located in Oregon and primarily heated by PGE or Pacific Power.</small>			
Upgrade type	Requirements	Incentive amount	
<input type="checkbox"/> Ducted heat pump	HSPF2 7.50 or greater. Must be residence's primary heat source and replace electric forced air furnace. Heat pump <b>cannot</b> have a backup gas heating system. 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.	\$1,000	
<input type="checkbox"/> Ducted heat pump in a single-family rental property	HSPF2 7.50 or greater. Must be residence's primary heat source and replace electric forced air furnace. Heat pump <b>cannot</b> have a backup gas heating system. 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. <b>Must be offered as an Energy Trust instant incentive by an approved trade ally to qualify.</b>	\$3,000	
<small>Ducted heat pump 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.</small>			
What type of heating system did this replace? <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 \$	
Heat Pump	HSPF2:	EER2:	SEER2:
	Manufacturer:	Model:	Serial #:





## Digging Deeper: Standard Incentive Application

### To Submit a Completed Incentive Application:

- Verify these steps to ensure application packet is complete
  - Install is complete
  - Application is complete, signed and includes supporting documentation
    - Applicable measure/equipment section completed
    - Manufacturer specifications sheet(s) are included \*
    - Itemized invoice(s) is/are included
    - W-9 for the Rental Owner is included, if applicable
- If everything is in order, submit application packet to Energy Trust through the Energy Trust online webform, email or paper mail.
  - <https://form.energytrust.org/>
  - [Residentialforms@energytrust.org](mailto:Residentialforms@energytrust.org)
  - Mail: 818 SW 3<sup>rd</sup> Ave #215  
Portland, OR 97204
  - Program email, mailing address, and fax number are all located in the “Steps to Completion” section on Page 1 of the application

*\*Including AHRI or EnergyStar certification if applicable is helpful!*



# Digging Deeper: Common Missing Information

Applications submitted by both customers and Trade Allies see similar common types of missing information. Knowing what those can be can help with both your own submissions and in assisting customers with their submissions.

## **General Incentives (customer paid incentives)**

- Missing *Paid in Full* invoice
- Missing details about the work
  - HVAC model information on invoice or application
  - Beginning and Ending R-values / Official U-Value documentation and Dimensions for windows
  - Heating System Replaced
  - Different participant signing the application vs who is billed on the invoice

## **Instant Incentives (Trade Ally paid incentives)**

- Incentive not provided on the invoice / Incentive not labeled correctly
- Incorrect Incentive Amount provided on the invoice
- Missing Customer Signature on 320 application or 350CC form
- Providing only a Proposal/Estimate/Contract
  - We will always require a finalized invoice

