

Trade Ally Forum

Session Name: 2026's Most Common Corrective Actions

Session Summary:

Quality Assurance Process:

- **Random Selection:** A portion of all Home Retrofit jobs are pulled for Work Quality Verification (IN 1.7) by Energy Trust Residential QA.
- **Pass:** The incentive application returns to the queue for payment.
- **Minor corrective action:** One instance of unsatisfactory work affecting energy saving or durability.
- **Major corrective action:** Multiple corrective actions, or any health and safety related corrective actions.
- **Corrections timeline:** Trade allies must contact the customer within 5 business days; Complete corrective actions within 30 calendar days.

Using the Specifications Manual:

The manual outlines the requirements per measure to receive an incentive. It is updated annually and is available free on the Energy Trust Insider webpage, along with forms, applications, and the training calendar.

Tip: Print each measure's checklist and send it out with your crews to every jobsite. The checklists point to the exact manual section, help your crews work faster, and help you avoid corrective actions.

HVAC Common Corrections

Ranked: Lockout Controls, Model & serial mismatch, CO alarms, Linesets, Outdoor unit install, Indoor unit install, Condensate drain

Upgrade	What the Specifications Require
Lockout controls <i>Protects comfort, savings, and heat pump efficiency</i>	• Extended Capacity Heat Pumps: lockout at 25°F; All other Heat Pumps: 35°F • Setbacks no more than 3°F • Thermostat must be on wi-fi or attached outdoor sensors • Keep photos documenting final settings; educate the homeowner
Model & serial number mismatch <i>Verifies sizing, efficiency, and one incentive per system</i>	• The permanent, factory-affixed label must be in place • Application info must match the unit exactly • Complete the application after the install to ensure accuracy
Carbon monoxide alarm <i>Functioning UL-listed alarm required</i>	• If a gas heating system or gas water heater is installed in the home, attached garage, or other attached space • If a gas system is orphaned by a new appliance installation • A combustion appliance is present when duct sealing is performed
Linesets <i>Protects against UV, weather, pests, and heat loss/gain</i>	• Seal all lineset penetrations with exterior-rated sealant • Insulate the full length with no gaps • Use mechanically secured rigid covering, maximize its coverage • Cust lines to size
Outdoor unit install <i>Ensure proper drainage, airflow, and longevity</i>	• Permanent, stable, level pad. • Horizontal-discharge units bolted to risers, risers fastened to the pad • Keep clear of debris and obstacles, seal penetrations • Site the unit considering condensate and airflow
Indoor unit install <i>Level, sealed, and accessible for future service</i>	• Level, plumb, and accessible for service and filter access • Air-tight, mechanically fastened duct connections • Seal all electrical and condensate penetrations • Fully insulate linesets

Condensate Drain <i>Prevents ice, standing water, and hazardous conditions</i>	• Slope downhill to a suitable termination point • Never terminate in a crawlspace or basement • Never drain onto a walkway, porch, or patio
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Weatherization Common Corrections

Ranked: Attic access, Floor penetrations, Exhaust fans, Dams, Insulation voids, Vertical walls, Water lines

Upgrade	What the Specifications Require
Attic access <i>Prevents air exchange and heat gain/loss</i>	• Ceiling access: insulate to R-30 and weatherstrip; knee wall access: R-15 • Pull-down stairs: weatherstrip, insulate to R-10, and do not block operation • Exterior access: weatherproof and vermin-proof
Floor penetrations <i>Gaps reduce effective R-value and let moisture through</i>	• Seal all plumbing, wiring, duct, and floor transition penetrations • Use caulk or foam and foam board where needed • Use fire-rated material around chimneys • Tip: seal before insulating, work in a grid pattern, and use backers for large holes
Exhaust fans <i>Moisture must leave the home</i>	• Vent to the outside through a dedicated boot, never into the attic • Mechanically fasten joints and boots (no screws on flex duct) • Shortest run, no sags, no more than two 90° bends • Kitchen fans use metal duct
Dams <i>Keeps insulation from sloughing and losing R-value</i>	• Install between insulated and uninsulated areas, around access points, between different insulation levels, and at heat-producing fixtures • Use durable rigid material (plywood, foam board, moisture-treated cardboard) • Batts as dams: at least 14.5" wide, laid flat, with R-value meeting the attic requirement
Insulation voids <i>Uneven coverage causes drafts, temperature swings, and moisture</i>	• Loose-fill level and smooth with uniform R-value, filled to decking or baffles at the eaves • Cut batts to fit; place tightly with no gaps
Vertical walls <i>Protects against moisture and insulation voids</i>	• Air seal, fill the cavity with insulation, and cover with a vapor-permeable air barrier • Includes vault side walls, skylights, and ceiling height transitions
Water lines <i>Insulating the floor can move the thermal boundary, exposing pipes to freeze</i>	• Insulate all water pipes outside the thermal boundary to R-3 • Always repair leaks first • No tape; secure with twine, corrosion-resistant wire, or plastic ties • Properly sized with no gaps; support every 24" and within 3" of the ends

Honorable Mention: Heat Pump & DHP Disqualifications

- Most common cause: misidentifying the primary heat source
- Any ducted system will always be considered the primary heat, regardless of how the homeowner uses it
- DHP's must serve the main living area; typically a living room on the main floor or like
- Gas conversions are not incentivized, and zonal systems cannot be replaced by cutting new ducts.

Installations that are eligible for Energy Trust incentives must follow the steps outlined in the Residential Specifications Manual:

<https://insider.energytrust.org/wp-content/uploads/Specifications-Manual.pdf>

→ Remember, corrective actions hold payment!

Make sure to visit the Energy Trust of Oregon Insider page for incentive information, contractor resources, and program updates:

