



HELP YOUR CUSTOMERS ACCESS CASH INCENTIVES

A STEP-BY-STEP GUIDE FOR EXISTING BUILDINGS TRADE ALLIES

Energy Trust of Oregon trade allies play an important role in helping customers identify energy-saving opportunities, complete eligible projects and receive cash incentives. Use this guide to support customers from the first conversation through incentive payment.

1.

Start the conversation early

Talk with your customer about their equipment needs, energy goals and project timeline.

Ask questions like:

- Is equipment failing or due for replacement?
- Are high energy costs a concern?
- Is the customer planning a renovation or capital project?
- Are comfort, maintenance or performance issues affecting the building?

Trade ally tip: Bring up incentives early, before equipment is purchased or installed.

2.

Identify eligible upgrades

Review Energy Trust's equipment incentives to determine whether the proposed equipment or project are eligible. Confirm:

- The customer is served by a participating utility
- The building and equipment meet eligibility requirements
- Any required pre-approval or project review is completed

Visit the Existing Buildings forms page for up-to-date incentive application forms and information sheets in English and Spanish.

Trade ally tip: Contact your regional trade ally coordinator with questions or for help qualifying the measure.

Scan for forms and requirements



3.

Review the project with the customer

Explain the recommended upgrade, estimated project cost and potential incentive.

Make sure the customer understands:

- What equipment or work is included
- What portion of the cost may be covered by incentives
- Which documents they will need to provide
- When the project and application must be completed

4.

Complete the project

Install eligible equipment according to program requirements, manufacturer specifications and applicable codes. Keep copies of:

- Final, itemized invoices
- Equipment specifications or product documentation
- Model and serial numbers, when required
- Installation dates
- Before and after photos or other supporting materials, when required

5.

Submit the incentive application

Complete the correct incentive application and submit all required documentation. Before submitting, double-check that:

- All required fields are complete
- Customer and trade ally contact information is accurate
- Equipment quantities and model numbers match the invoice
- The customer has signed where required
- The invoice clearly separates equipment, labor and other project costs
- All supporting documents are included

6.

Respond to follow-up questions

Energy Trust may contact the customer or trade ally if information is missing or clarification is needed. Respond promptly to help prevent payment delays.

Common causes of delays: Missing signatures, incomplete invoices, incorrect equipment information and missing supporting documents can slow application review.

7.

Incentive review and payment

Energy Trust reviews the application and confirms that the project meets program requirements. Once the application is approved, the incentive payment is issued to the payee identified on the application. Payment timing may vary depending on application completeness, project requirements and whether additional review is needed.



HELP CUSTOMERS KNOW WHAT TO EXPECT

Let the customer know:

- Who will receive the incentive payment
- How the payment will be issued
- That incomplete information may delay payment
- That Energy Trust may contact them during the review process

A complete and accurate application helps customers receive their incentive payment as smoothly as possible.



Questions? Contact your Energy Trust trade ally coordinator or email the program team at existingbuildings@energytrust.org.

