

Oregon Residential, Central Air Conditioning Install

Residential | Incentive Application | Form 320_{CAC}



Steps to completion:

- 1 Make** an energy saving improvement in an existing home.
- 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** form by mail, fax or email (with documentation) to:

Energy Trust of Oregon Residential
 818 SW 3rd Ave, #215
 Portland, OR 97204
 1.866.311.1822 phone
 1.866.516.7592 fax
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 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*

Promo Code
(optional)

**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 energytrust.org/w9.*

Site address _____ City _____ State ^{OR} 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
 *Site must be serviced by PGE or Pacific Power to qualify

Gas utility: NW Natural Cascade Natural Gas Avista Other _____

Site Information

| | | |
|---|--|--|
| Year built: | Square feet (conditioned space): | Number of levels: |
| 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"/> Crawlspace w/ vapor barrier <input type="checkbox"/> | <input type="checkbox"/> Half basement <input type="checkbox"/> Full basement <input type="checkbox"/> Slab on grade |
| Residence type: <input type="checkbox"/> Single-family home <input type="checkbox"/> Manufactured home | | |

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 measures have been completed satisfactorily by Contractor as of the signature date below, and that all accompanying documentation is complete and accurate. If Customer identifies as 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 the 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 improvements 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 Home Retrofit [Specifications Manual](#) and all other Energy Trust requirements.

| | | |
|----------------------|---|--------------|
| Contractor signature | Full name (please print) | Date |
| Contractor company | OCCB# or Washington License # (Non-trade ally only) | Install date |

Oregon Residential, Central Air Conditioning Install

Residential | Incentive Application | Form 320_{CAC}



Site Heating System Information

| | | | |
|--|---|--------------------------------------|-------------------------------|
| Primary heating system <i>(check one)</i> | <input type="checkbox"/> Electric furnace | <input type="checkbox"/> Gas furnace | <input type="checkbox"/> Wood |
| | <input type="checkbox"/> Propane | <input type="checkbox"/> Other: | |

Cooling Incentive *One incentive per residence. Residence must be serviced Portland General Electric (PGE) or Pacific Power*

| Upgrade type | Requirements | Incentive amount |
|---|---|------------------|
| <input type="checkbox"/> Qualifying Central Air Conditioner | System must be a qualifying central air conditioner serving most or all of the home. Residences primarily heated with a heat pump do not qualify. | \$250 |

| | | |
|--|---|-------------------------|
| Central Air Conditioner Installed Cost: \$ | New heating system installed cost (if applicable): \$ | System Capacity (Tons): |
|--|---|-------------------------|

| | |
|-----------------------|----------------|
| Outdoor Manufacturer: | Outdoor Model: |
|-----------------------|----------------|

| | |
|--------------------------------------|-------------------------------|
| Indoor Evaporator Coil Manufacturer: | Indoor Evaporator Coil Model: |
|--------------------------------------|-------------------------------|

| | |
|------------------------------|-------------------------|
| Furnace/Blower Manufacturer: | Furnace/Blower Model #: |
|------------------------------|-------------------------|

If an eligible gas furnace was installed in an Oregon rental property with this air conditioner, please provide a customer signed [Form 320C-HVAC](#) incentive application along with this application. For more information about Energy Trust's gas furnace incentives, contact us at 1.866.311.1822 or residential@energytrust.org.

| | | |
|--------------------------|--|--|
| Outdoor Unit SEER | <i>To qualify for this incentive, the air conditioner outdoor unit is required to achieve a minimum nominal rating 15 SEER as stated by manufacturer. For list of known qualifying units, please visit: energytrust.org/central-air-conditioners/</i> | |
| | Outdoor unit SEER per manufacturer (minimum 15): | Did this central air conditioner replace an existing central air conditioner? <input type="checkbox"/> Yes <input type="checkbox"/> No |

| | | |
|----------------------------------|--|--|
| Outdoor Unit and Coil EER | <i>To qualify for this incentive, the system's outdoor unit and indoor coil are required to achieve a minimum system rating of 12 EER per AHRI rating.</i> | |
| | Outdoor unit and indoor coil EER (per AHRI): | |

I have attached an AHRI certificate*: Yes No - list certificate number:

*Energy Trust requires the system adheres to AHRI configurations. If certificate indicates Thermostatic Expansion Valve (TXV) and/or Time Delay Relay (TDR) as necessary to achieve certified efficiency rating, the system will be quality checked under these guidelines.

Smart Thermostat Incentive *Residence must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista. (Must be installed before August 1, 2021).*

| Upgrade type | Requirements | Incentive amount |
|---|---|------------------|
| <input type="checkbox"/> Smart thermostat | Residence must be primarily heated by an electric furnace or gas furnace. Thermostat must be connected to the internet through a Wi-Fi network and configured with the residence's location. Visit energytrust.org/thermostat for eligible models manufactured by Google, ecobee, Bryant and Carrier. | \$100 |

| | | |
|-------------------|---------------|-------------|
| Thermostat | Manufacturer: | Model Name: |
| | Model #: | Serial #: |

Oregon Residential, Central Air Conditioning Install

Residential | Incentive Application | Form 320_{CAC}



Terms and Conditions

APPLICATION: This application and any required additional documentation must be filled out completely and accurately. Customers may wish to retain a copy of this application and any accompanying documentation submitted to Energy Trust. Energy Trust will not be responsible for lost documentation pertaining to this application request. **The Residential program must receive applications within 60 days after the date of installation.** Incentives offers are subject to funding availability and may change. **Incentive amounts are valid for installations done through December 31, 2021. Please allow 4-6 weeks for incentive processing.**

ELIGIBILITY: Incentives are available to approved Customers who are: (i) Oregon residential electric service customers of Portland General Electric or Pacific Power, and (ii) Oregon residential natural gas service customers of NW Natural, Cascade Natural Gas or Avista. Incentives for energy-saving measures that help save on the cost of home heating or cooling are available to PGE and Pacific Power customers who heat their homes with electricity and to NW Natural, Cascade Natural Gas and Avista customers who heat their homes with natural gas. Final determination of eligibility shall rest solely with Energy Trust. For all measures except approved self-installation projects, measures must be installed by an Energy Trust trade ally contractor or any other licensed contractor with a current Oregon Construction Contractors Board (CCB) license.

ELIGIBLE PRODUCTS: Products must meet Energy Trust energy efficiency specifications. These specifications may be found on the web at www.energytrust.org and are subject to change. If you or your contractor are not sure of the specifications, please call Energy Trust before proceeding.

WORK QUALITY VERIFICATION: Prior to any payment of incentives, Contractor will verify that the installed energy-saving measures meet Energy Trust of Oregon specifications (as defined by Building Performance Institute and the current Energy Trust Specification Manual). Outdoor temperatures may affect this verification process. Customer's home may also be selected for a quality control post-installation visit. No warranty is implied by this work quality verification.

PAYMENT: Incentives will be paid after: (i) completion and/or installation of the energy-saving measures, (ii) verification of the completion and/or installation of the measures, and (iii) timely submission of all required documentation of measures. Incentives will be paid directly to Customer.

PROOF OF PURCHASE: The invoice documentation accompanying this application must **itemize** the products purchased and/or work performed. The invoice must show a description of any installation or other labor charges and that the invoice is paid in full.

INCENTIVE AMOUNT: Incentive amount cannot exceed total installed cost. Incentives for energy-saving measures completed and/or installed as set forth in documentation accompanying this application are limited to the amounts provided by Energy Trust. Such amounts are subject to change. Current incentive amounts are identified on the web at www.energytrust.org. Contact Energy Trust with any questions.

TAX LIABILITY: Energy Trust is not responsible for any tax liability, which may be imposed on the Customer as a result of payment of any incentives or as a result of obtaining financing. Energy Trust is not providing tax advice, and any communication by Energy Trust is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

FACSIMILE/SCANNED: Facsimile transmission of any signed original document, and the retransmission of any signed facsimile transmission, are the same as delivery of the original signed document. Scanned original documents transmitted to Energy Trust as an attachment via electronic mail are the same as delivery of the original signed document. At the request of Energy Trust, Customer shall confirm documents with a facsimile transmitted signature or a scanned signature by providing the original document.

SAFETY AND BUILDING CODES: Customer represents that, with respect to the products and work performed identified in the documentation accompanying this application: (i) all products installed and work performed complies with all federal, state and local safety, building and environmental codes, and (ii) products are UL listed, if applicable, and installed per manufacturer's instructions.

NO ENDORSEMENT: Energy Trust does not endorse any particular manufacturer, contractor, or. The fact that the names of particular manufacturers, contractors, products, or systems may appear on this application does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.

PROPERTY RIGHTS: Customer represents that Customer has the right to complete and/or install the energy-saving measures on the property on which those measures are completed and/or installed and that any necessary landlord's consent has been obtained.

ACCESS AND EVALUATION: Energy Trust and/or its representatives may request access to the property on which energy-saving measures have been completed and/or installed and may review and evaluate the project during and after completion. Customer agrees to provide reasonable access to the property for the purposes described herein.

DISCLAIMER/NO LIABILITY: Customer understands that, although Energy Trust may provide Customer with an incentive payment, Energy Trust is not supervising work performed for Customer nor is Energy Trust responsible in any way for proper completion of that work or proper performance of any products purchased. Energy Trust is simply providing funding to assist Customer in implementing energy-saving measures. Customer assumes the risk of any loss or damage(s) that Customer may suffer in connection with installation of the measures. Energy Trust does not guarantee any particular energy-saving results by its approval of the application or by any other of its actions.

ENERGY INFORMATION RELEASE: Customer authorizes Energy Trust and the contractor signing this application to access utility energy usage data relating to the property on which energy-saving measures have been completed and/or installed. To do so, Energy Trust may access the electric and natural gas accounts and thermostat usage information at the physical address of the project, and the contractor may access thermostat usage information at the physical address of the project. Customer agrees to provide reasonable assistance to Energy Trust to obtain such information. Customer also authorizes the contractor signing this application to share information about the Customer's thermostat system, including, without limitation, thermostat usage information, with Energy Trust.

INFORMATION RELEASE: Customer agrees that Energy Trust may include Customer's name, Energy Trust services and resulting energy-savings in reports or other documentation submitted to Energy Trust, its Board of Directors, the Oregon Public Utility Commission, Oregon Department of Energy, Oregon Housing and Community Services and/or the Oregon Legislature. Energy Trust will treat all other information gathered in evaluations as confidential and report it only in the aggregate.