


# Oregon Savings Within Reach Incentive Application



Residential and Multifamily | Income Verification | Form 320<sub>SWR</sub>

**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.
- 2 Complete** application information, including:
  - Trade Ally **and** customer signatures
  - Invoice billing the customer and showing Savings Within Reach deductions
  - Form 310SWR Income Verification
  - Form 301CDI (if applicable)
- 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 Trade Ally **and** customer.
- Energy Trust must receive applications within **60 days** from the date of installation.
- **Incomplete information will result in delayed payment or disqualification.**

## Customer Information

**Promo Code**  
(optional)

This residence is:  Owner occupied  A rental

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  Other \_\_\_\_\_


Gas utility:  NW Natural  Cascade Natural Gas  Avista  Other \_\_\_\_\_

## Site Information

Year built	Square feet	Number of levels	
Primary heating system <b>(check one)</b>	<input type="checkbox"/> Electric furnace	<input type="checkbox"/> Ductless heat pump	<input type="checkbox"/> Wood
	<input type="checkbox"/> Electric baseboard	<input type="checkbox"/> Gas furnace	<input type="checkbox"/> Propane
	<input type="checkbox"/> Ducted heat pump	<input type="checkbox"/> Gas fireplace	<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"/> Crawlspace no vapor barrier	<input type="checkbox"/> Full basement	<input type="checkbox"/> Slab on grade
	<input type="checkbox"/> Crawlspace w/ vapor barrier	<input type="checkbox"/> Half basement	
	<input type="checkbox"/> Garage/basement combo	<input type="checkbox"/> Other _____	
Property type:	<input type="checkbox"/> Single-family home	<input type="checkbox"/> Condo	<input type="checkbox"/> Duplex
	<input type="checkbox"/> Manufactured home	<input type="checkbox"/> Townhouse	<input type="checkbox"/> Triplex
		<input type="checkbox"/> Rowhouse	<input type="checkbox"/> Fourplex

## Customer Name and Signature


By signing below, Customer agrees to the terms and conditions of this application and authorizes Trade Ally to submit this application and all required invoices or measure documentation to Energy Trust on Customer's behalf for all Energy Trust incentives that are available for the energy-saving measures that Trade Ally has completed for Customer. By that authorization, Customer represents to Energy Trust that all measures have been completed satisfactorily as of the signature date below, and that any accompanying invoices or measure documentation are complete and accurate.



Customer signature	Full name (please print and use same name as on invoice)	Date
Customer email address		

## Trade Ally (Contractor) Name and Signature

By signing below, Trade Ally certifies that this application and any accompanying invoices or measure documentation are complete and accurate, and that all improvements associated with this incentive request were completed as of the signature date below. To receive incentives, all work must comply with the Home Retrofit [Specifications Manual](#).



Trade Ally signature	Full name (please print)	Date
Trade ally company		Install date

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<b>Ductless Heat Pump Incentive</b> <i>One incentive per residence. Residence must be primarily heated by Portland General Electric ("PGE") or Pacific Power.</i>			
Upgrade type	Requirements		Incentive amount
<input type="checkbox"/> Ductless heat pump	Must be inverter-driven with an HSPF of 9.0 or greater and <b>replace electric resistance heat</b> as the residence's primary heating system. Primary indoor unit must be installed in the main living space (e.g., living room).		<b>\$1000</b>
In what type of room was the primary indoor unit installed? (e.g., living room, great room):			
What type of heating system did this replace?	<input type="checkbox"/> Electric furnace	<input type="checkbox"/> Electric radiant heat	<input type="checkbox"/> Electric wall heat
	<input type="checkbox"/> Electric baseboard	<input type="checkbox"/> Other:	
Is there an alternate, non-electric heating source being used to heat the room? If so, what is it?	<input type="checkbox"/> Oil heater	<input type="checkbox"/> Propane heater	<input type="checkbox"/> Gas stove
	<input type="checkbox"/> Wood stove	<input type="checkbox"/> Pellet stove	<input type="checkbox"/> Gas fireplace
	<input type="checkbox"/> No secondary heating system present	<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 \$
Qty of outdoor units:	Qty of indoor units:	Total capacity (BTUs):	HSPF:
Outdoor unit*:    Manufacturer:	Model:		Serial #:
Indoor unit*:    Model:			
* Energy Trust incentive is intended to offset the cost of one outdoor unit and one indoor unit; additional units are unlikely to produce significant additional energy savings. If more than one outdoor and/or indoor unit is installed, please provide information for the highest capacity unit.			

<b>Ducted Heat Pump Incentive<sup>1</sup></b> <i>Residence must be primarily heated by PGE or Pacific Power.</i>			
Upgrade type	Requirements (HSPF)		Incentive amount
<input type="checkbox"/> Ducted heat pump	HSPF 8.5 or greater. Additional incentives are also available for installing new heat pump controls, see qualifications in section below. Must be home's primary heat source and replace electric resistance heat (baseboard, wall heaters, electric furnace).		<b>\$1000</b>
What type of heating system did this replace?	<input type="checkbox"/> Electric baseboard	<input type="checkbox"/> Wall heat	<input type="checkbox"/> Electric furnace
	<input type="checkbox"/> Other:		
Is an AHRI certificate attached to this application? <input type="checkbox"/> Yes <input type="checkbox"/> No, provide information below:			Installed Cost \$
HSPF	EER	SEER	
Manufacturer		Model	

<sup>1</sup> For multifamily residences, ducted heat pump, new heat pump controls, gas furnace, and insulation must be installed in a duplex, triplex, fourplex, or side-by-side property (townhouse or rowhouse).

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**Heating Controls Incentives<sup>1</sup> Residence must be primarily heated by PGE or Pacific Power.**

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> New heat pump controls	Can be combined with ducted heat pump incentive. Must be added to a new heat pump with electric furnace auxiliary heat. Heat pump must be home's primary heating system. Visit <a href="http://www.energytrust.org/heatpumpcontrols">www.energytrust.org/heatpumpcontrols</a> for eligible models and more information. Thermostat must be set to 35°F lockout or as close as possible. Cannot be combined with other controls incentives.	<b>\$250</b>
<b>Thermostat</b>	Lockout temperature set to 35° F? <input type="checkbox"/> Yes <input type="checkbox"/> No	Installed Cost \$
	Manufacturer	Model Name Model #

**Smart Thermostat Incentive For self-installed projects, apply online at [www.energytrust.org/now](http://www.energytrust.org/now) or use Form 320S. Oregon residences must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista.**

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Smart thermostat	Residence must be primarily heated by an electric furnace, gas furnace, or ducted heat pump. Thermostat must be connected to the internet through a Wi-Fi network and configured with the home's location. Visit <a href="http://www.energytrust.org/thermostat">www.energytrust.org/thermostat</a> for eligible models. Cannot be combined with other controls incentives.	<b>\$100</b>
<b>Thermostat</b>	Manufacturer:	Installed Cost \$
	Model Name:	Model #:

**Gas Furnace Incentive<sup>1</sup> Residence must be primarily heated by NW Natural, Cascade Natural Gas or Avista.**

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Gas furnace	90% or greater AFUE. Must be home's primary heat source. Not eligible for gas furnaces used as backup for high-efficiency heat pumps, also known as hybrid systems. A CO monitor is required on every floor with a bedroom.	<b>\$550</b>
ECM <input type="checkbox"/> Yes <input type="checkbox"/> No	AFUE %	Gas furnace Installed cost \$
Manufacturer	Model #	Serial #
What type of heating system did this replace? <input type="checkbox"/> Gas furnace <input type="checkbox"/> Electric furnace <input type="checkbox"/> Oil heater <input type="checkbox"/> Wood <input type="checkbox"/> Other: _____		

**Water Heater Incentives Hybrid, and tankless water heaters do not qualify for these incentives. Residence must primarily heat water with electricity provided by PGE or Pacific Power.**

Upgrade type	Requirements	Incentive amount
<input type="checkbox"/> Heat pump water heater	Eligible models must meet Northwest Energy Efficiency Alliance's (NEEA's) Advanced Water Heater Specification Tier 3 and replace an existing electric water heater. Tank may be any size.	<b>\$270</b>
EF	Capacity Gallons	Installed cost \$
Manufacturer	Model #	Serial #
Water heater location <input type="checkbox"/> Garage <input type="checkbox"/> Basement <input type="checkbox"/> Crawlspace <input type="checkbox"/> Main living space <input type="checkbox"/> Other _____		

<sup>1</sup> For multifamily residences, ducted heat pump, new heat pump controls, gas furnace, and insulation must be installed in a duplex, triplex, fourplex, or side-by-side property (townhouse or rowhouse).

# Oregon Savings Within Reach Incentive Application



Residential and Multifamily | Income Verification | Form 320<sub>SWR</sub>

**Insulation Incentives<sup>1</sup>** *Residence must be primarily heated by PGE, Pacific Power, NW Natural, Cascade Natural Gas or Avista.*

Insulation type*	Max beginning R-value	Insulate to:	Quantity installed	Beginning R-value	Ending R-value	Cavity filled?	Installed cost	Incentive per sq. ft
Wall (includes rim joist and knee wall)	R-4	R-11 or fill cavity	_____ sq.ft. (total of all types)	R-	R-	<input type="checkbox"/>	\$	<b>\$.50</b>
<ul style="list-style-type: none"> <li>• If applying for multiple wall insulation types, provide beginning R-value value of wall insulation type with largest sq. ft installed.</li> <li>• For rim joist insulation to qualify, must be insulated to R-15 or fill cavity. For knee wall insulation to qualify, must be insulated to R-15 for 2x4 cavities; R-21 for 2x6 cavities</li> </ul>								
Attic	R-11	R-38	_____ sq.ft.	R-	R-	-	\$	<b>\$.50</b>
Floor	R-0	R-30 or fill cavity	_____ sq.ft.	R-	R-	<input type="checkbox"/>	\$	<b>\$.40</b>

\* Manufactured homes are not eligible for attic, wall, knee wall or rim joist insulation incentives. All exterior wall surfaces must be insulated to qualify for wall insulation. Attic insulation must be R-19 or higher for knee wall insulation to be eligible for an incentive.

<sup>1</sup> For multifamily residences, ducted heat pump, new heat pump controls, gas furnace, and insulation must be installed in a duplex, triplex, fourplex, or side-by-side property (townhouse or rowhouse).

# Oregon Savings Within Reach Income Verification Form



Residential and Multifamily | Income Verification | Form 310<sub>SWR</sub>

**This form must be completed prior to work beginning in the Savings Within Reach incentive track and must be submitted with a Savings Within Reach incentive application.**

I, \_\_\_\_\_ am a  Homeowner or  Tenant (*check one*) of the single-family home, manufactured home, condo, townhome, or multifamily unit energy-saving measures have been completed, I am also a customer of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas or Avista and use one of those utilities to heat my property. I live in \_\_\_\_\_ County, Oregon. I am aware of the following four options and sources of funds available for energy efficiency home improvements in Oregon:

a) **Low Income:** A Community Action Agency can provide certain upgrades for free due to access to additional federal funds but requires customers to prove that their household income is below 200% of federal poverty guidelines.

b) **Moderate Income:** Energy Trust's Savings Within Reach incentive track is designed to provide the highest level of assistance for moderate income customers as defined by Oregon Statutes.

2020 Moderate Income Chart		
Household Size	Minimum	Maximum
1 person	\$25,520	\$51,966
2	\$34,480	\$67,955
3	\$43,440	\$83,945
4	\$52,400	\$99,934
5	\$61,360	\$115,922
6	\$70,320	\$131,912
7	\$79,280	\$134,910
8 or more	\$88,240	\$137,909

c) **Coronavirus Related Employment Disruptions:** Energy Trust's Savings Within Reach incentive track is available through December 31, 2020 to customers whose employment was disrupted by Coronavirus and are eligible to receive assistance from local, state and/or federal government resources or eligible to participate in a community-based emergency fund grant.

d) **All Income:** Energy Trust offers financial incentives to all Energy Trust customers without income qualification requirements.

Note: Income includes all gross wages, tips, rental income, public assistance, social security or pensions, income from self-employment, alimony, interest or any other sources of income defined by the IRS income tax return.

By my signature below, I hereby certify that I qualify for Energy Trust's Savings Within Reach incentive track because either 1) my total household income does exceed the maximum income for my household size as indicated in the "2020 Moderate Income Chart" above or 2) my total household income is impacted by Coronavirus related disruption in employment circumstances as defined in **option C** above.

I also acknowledge that participating in this program will require me (or my landlord, if applicable) to pay a share of the project cost. I certify that the information presented is true and accurate. I further understand that providing false representations herein constitutes an act of fraud. False, misleading or incomplete information may render the customer ineligible to participate in Energy Trust's Savings Within Reach incentive track. If Energy Trust finds that any information provided in connection with Savings Within Reach is false, then Energy Trust reserves the right to require reimbursement of any incentives provided. Energy Trust reserves the right to request additional documentation or proof of income to verify income qualification.

(Select all that apply)

- My household income is between the minimum and maximum income as indicated in the Moderate Income Chart above.
- My household income is below the minimum income for my household size as indicated in the Moderate Income Chart above. I understand that because of my income level, I am eligible to receive weatherization services and/or other energy upgrades from Oregon Housing and Community Services (OHCS) that may be available to me for free, but I still choose to participate in Savings Within Reach.
- My household income is impacted due to Coronavirus related employment disruptions as indicated in option C above and is eligible to participate in Savings Within Reach through December 31, 2020.

\_\_\_\_\_  
Signature

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date

Name of person who will be paying for the work:

\_\_\_\_\_  
(Print Name)

**Thank you for participating in Energy Trust's Savings Within Reach incentive track**

# Oregon Savings Within Reach Incentive Application

## Residential and Existing Multifamily | Incentive Application | Form 320<sub>SWR</sub>

### Terms and Conditions

**APPLICATION:** This application and any required additional documentation, including Data Sheets and Verification of Income Qualification forms must be filled out completely, truthfully and accurately. Customers may wish to retain a copy of this application and any accompanying documentation submitted to Energy Trust under this program. Energy Trust will not be responsible for lost documentation pertaining to this application request. **The Residential or Existing Multifamily program must receive applications within 60 days after the date of installation.** Incentives offers are limited and subject to availability of funding. Details of the Residential and Existing Multifamily Programs, including Savings Within Reach incentives, are subject to change without prior notice. **Incentive amounts are valid for installations through December 31, 2020. Please allow 4-6 weeks for incentive processing.**

**ELIGIBILITY:** Incentives are available to eligible Customers who are: (i) Oregon residential electric service customers of PGE or Pacific Power, and/or (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 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.

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

**WORK QUALITY AND INCOME VERIFICATION:** Prior to any work beginning, Trade Ally will verify Customer's income eligibility by completing the **Verification of Income Qualification**. Prior to any payment of incentives, Trade Ally will verify that the installed energy-saving measures meet program requirements and Energy Trust specification standards. 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:** Energy Trust will pay incentives to the Trade Ally 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. Incentives will be paid directly to Trade Ally; Trade Ally will reduce overall billing to Customer by applicable incentive amounts.

**INVOICE REQUIREMENTS:** The invoice documentation accompanying this application must **itemize** the products purchased and/or work performed. This invoice must show: (i) the date of purchase and itemized price paid, (ii) the size, type, make, model or part number for the products, and (iii) a description of any installation or other labor charges. Invoice must show total cost before Savings Within Reach incentive is applied.

**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/savingswithinreach](http://www.energytrust.org/savingswithinreach). 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 and Trade Ally represent 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 product. 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 incentive payments for work performed for Customer, 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.