

Multifamily Heating, Ventilation and Cooling Incentives

Existing Multifamily | Incentive Application | Form 320_{HVAC}



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 an existing multifamily property in Oregon. Electric customers of Portland General Electric or Pacific Power can apply for incentives for qualifying electric equipment, and natural gas customers on eligible rate 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 payee, if applicable
 - Invoice(s) for product and installation
 - 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
1.877.510.2130 phone
503.243.1154 fax
multifamily@energytrust.org
- 4 Receive** your check. Please allow six to eight weeks for incentive processing after completed application is received.

What you need-to-know:

- Energy Trust must receive applications within 90 days from equipment purchase and install.
- Incomplete information will result in delayed payment or disqualification of the incentive.
- A post-installation verification may be required to receive payment.
- Use **Forms 320APP, 320WH, or 320WX** for other Existing Multifamily upgrades.

Energy Trust Use Only	Project ID	PT ID	Promo 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 <input type="checkbox"/> Work <input type="checkbox"/> Cell		Email	
Property Ownership <input type="checkbox"/> Investment Owner <input type="checkbox"/> Individual Unit Owner		Occupied by <input type="checkbox"/> Owner <input type="checkbox"/> Tenant	
Is this property used for rental income? <input type="checkbox"/> Yes <input type="checkbox"/> No			<i>If you checked Yes, a W-9 is required for payment.</i>

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

Company Name			
Contact Name		Title	
Mailing Address			
City		State	Zip
Phone <input type="checkbox"/> Work <input type="checkbox"/> 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 <input type="checkbox"/> Affordable Housing <input type="checkbox"/> Campus Living <input type="checkbox"/> Asst Living/Retirement <input type="checkbox"/> Market Rate <input type="checkbox"/> HOA <input type="checkbox"/> Individual Unit Owner			
Building Style <input type="checkbox"/> Low-Rise (1-3 stories) <input type="checkbox"/> Mid-Rise (4-8 stories) <input type="checkbox"/> High-Rise (9 or more stories)		<input type="checkbox"/> Duplex <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex <input type="checkbox"/> Townhouse/Rowhouse <input type="checkbox"/> Other _____	
Electric Utility <input type="checkbox"/> PGE <input type="checkbox"/> Pacific Power <input type="checkbox"/> Other _____		Gas Utility <input type="checkbox"/> NW Natural <input type="checkbox"/> Cascade Natural Gas <input type="checkbox"/> Avista <input type="checkbox"/> None	

Space Heating *(check all that apply)*

<input type="checkbox"/> Electric (select system type) <input type="checkbox"/> Ducted Heat Pump <input type="checkbox"/> Wall Heater <input type="checkbox"/> Furnace <input type="checkbox"/> Baseboard <input type="checkbox"/> Ductless Heat Pump <input type="checkbox"/> PTHP <input type="checkbox"/> Other _____				<input type="checkbox"/> Gas (select system type) <input type="checkbox"/> Central Boiler <input type="checkbox"/> Furnace <input type="checkbox"/> Other _____	
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Gas Heating Incentives

► For all property types

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Gas-fired High-Efficiency Condensing HVAC Boiler <input type="checkbox"/> \$6.50 per kBtu/h	<ul style="list-style-type: none"> Must have at least 94% efficiency, either Annual Fuel Utilization Efficiency (AFUE) or Thermal Efficiency (TE) Must not be a backup, redundant or lagging boiler Must be used for HVAC purposes: boilers used for domestic hot water (DHW), pool heating, and “heat adders” that serve water-source heat pump systems do not qualify Must have a turndown ratio of at least 5 to 1 Boiler must be served by a participating gas utility 	Manufacturer:	\$	kBtu/h	\$
		Model:			
Thermostatic Radiator Valve (TRV) <input type="checkbox"/> \$200 per TRV	<ul style="list-style-type: none"> Must replace manual, non-thermostatic valves at dwelling unit radiators Must be installed in a gas central hydronic or central steam systems served by a participating gas utility 	Manufacturer:	\$		\$
		Model:			
Steam Trap <input type="checkbox"/> \$350 per trap	<ul style="list-style-type: none"> Must replace or repair a failed, open existing steam trap All steam traps in the system must be tested for failure status prior to replacement or repair Steam Traps must be installed on a gas-fired steam boiler system served by a participating gas utility For trap repairs, invoices for steam trap repair parts are required 	Manufacturer:	\$		\$
		Model:			
		Trap Size:			

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

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Gas Furnace <input type="checkbox"/> \$1,600 per unit	<ul style="list-style-type: none"> Must have at least 95% Annual Fuel Utilization Efficiency (AFUE) Furnace must be used as a primary heat source, not as backup heat source Gas must be provided by a participating gas utility 	Manufacturer:	\$		\$
		Model:			

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Gas Heating Incentives, continued

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

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Gas High-Efficiency Direct-Vent Fireplace <input type="checkbox"/> \$150 per unit 70% - 74.9% Fireplace Efficiency (FE) <input type="checkbox"/> \$250 per unit 75% FE or higher	<ul style="list-style-type: none"> • Must use intermittent pilot ignition • Gas Fireplace must be included in Energy Trust's list of qualifying products • Qualifying models at: www.energytrust.org/fireplace* • Gas must be provided by a participating gas utility 	Manufacturer:	\$		\$
		Model:			

* Full list of qualifying products: energytrust.org/wp-content/uploads/2016/09/GFPL_QPL_November_2023.pdf

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► For stacked structures with 5 or more dwelling units only

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Condensing Gas Furnace <input type="checkbox"/> \$8.25 per kBtu/h	<ul style="list-style-type: none"> • Input capacity must be less than 225,000 Btu/h • Must have at least 91% Thermal Efficiency (TE) rating. If furnace does not have a TE rating, instead use Annual Fuel Utilization Efficiency (AFUE) • Must be a part of a centralized heating system serving multiple units or regularly occupied multifamily common area. Offices are not considered common areas. • If furnace is rated in both TE and AFUE, TE shall be used to determine qualification • Gas must be provided by a participating gas utility 	Manufacturer:	\$	kBtu/h	\$
		Model:			

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Generator Block Heater Incentives

► For all property types

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Forced Circulation Generator Block Heater <input type="checkbox"/> \$400 per new or replaced heater 0 – 3.0 kW <input type="checkbox"/> \$1,400 per new or replaced heater 3.1 – 9.0 kW <input type="checkbox"/> \$400 per retrofit (upgrading existing, functional) heater 2.5 – 3.0 kW <input type="checkbox"/> \$1,400 per retrofit (upgrading existing, functional) heater 3.1 – 9.0 kW	<ul style="list-style-type: none"> Generator must be stationary and fixed The heater must use forced circulation and be installed by manufacturer-certified installer For retrofit projects (upgrades), the heater must replace a thermosiphon block heater and must be at least 2.5 kilowatts (kW) Site must receive electricity from a participating utility 	Manufacturer:	\$		\$
		Heater size in Kilowatts (kW):			

Heat Pump Incentives

► For all property types

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested		
Packaged Terminal Heat Pump (PTHP)* <input type="checkbox"/> \$800 per unit	<ul style="list-style-type: none"> Must replace electric resistance heat or a packaged terminal air conditioner (PTAC) with existing electric resistance heating Qualifying models must be found on the PTHP list here: www.ahridirectory.org 	Manufacturer:	\$		\$		
		Model:					
		Equipment Replaced:					
Ductless Heat Pump (DHP)* <input type="checkbox"/> \$1,800 per outdoor unit	<ul style="list-style-type: none"> Equipment must be at least 8.10 HSPF2 At least one indoor unit must displace electric resistance heat in primary living space. Electric resistance heat includes electric furnace, baseboard heat, ceiling heat or in-wall unit Replacing natural gas heating in unit does not qualify Ducted indoor heads are allowed if all other requirements are met 	Manufacturer:	\$	# outdoor units	\$		
		Outdoor Unit Model:		# indoor units			
		Indoor Unit Model(s):					
		Size (tons):	Type of heating system replaced:				
			<input type="checkbox"/> Electric baseboard	<input type="checkbox"/> Electric furnace			
			<input type="checkbox"/> Wall heat	<input type="checkbox"/> Other			
		In what type of room was the primary unit installed? (e.g. living room):					
		Is a secondary heating system in the same room of the primary indoor unit? If so, select all that apply: <input type="checkbox"/> Oil heater <input type="checkbox"/> Wood heater <input type="checkbox"/> Gas stove <input type="checkbox"/> Wood stove <input type="checkbox"/> Pellet stove <input type="checkbox"/> Gas fireplace <input type="checkbox"/> Other					
		If a secondary heating system is present, how frequently is it used to heat the room during the heating season <input type="checkbox"/> Multiple times per week <input type="checkbox"/> 1-2 times per month <input type="checkbox"/> 1-2 times per season <input type="checkbox"/> Never					
		* Applicable HSPF2, EER2 or SEER2 requirements apply to equipment manufactured after January 1, 2023. If the equipment installed was manufactured prior to January 1, 2023, verify eligibility at https://www.energytrust.org/incentives/energy-efficiency-standards/ . Properties applying for heating incentives must have space heating provided by a participating utility.					

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Heat Pump Incentives, continued

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Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Ducted Heat Pump <input type="checkbox"/> \$1,000 per unit	<ul style="list-style-type: none"> Equipment must be at least 7.50 HSPF2* Must replace electric forced air furnace as primary heat source Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives Energy Trust recommends electric auxiliary heat be locked out by thermostat at 35°F or per manufacturer's recommended energy saving setting Thermostat must either have outdoor temperature sensor or be a qualified web-enabled model that is connected to the internet. Replacing an existing heat pump does not qualify 	Manufacturer: Model: Equipment Replaced:	\$		\$
Heat Pump Advanced Controls <input type="checkbox"/> \$250 per unit	<ul style="list-style-type: none"> Must be web-enabled or utilize outdoor temperature sensor Contractor-installed on a ducted heat pump with electric furnace auxiliary heat source programmed with 35°F lockout Cannot be combined with other heat pump, heat pump controls, or other smart thermostat incentive Controls must be included in Energy Trust's list of qualifying products** 	Manufacturer: Model:	\$		\$
		Controls installed on: <input type="checkbox"/> New heat pump <input type="checkbox"/> Existing heat pump			
		Lockout temp: °F			
* Applicable HSPF2, EER2 or SEER2 requirements apply to equipment manufactured after January 1, 2023. If the equipment installed was manufactured prior to January 1, 2023, verify eligibility at https://www.energytrust.org/incentives/energy-efficiency-standards/ . Properties applying for heating incentives must have space heating provided by a participating utility. ** Full list of qualifying products: energytrust.org/heatpumpcontrols					

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Heat Pump Incentives, continued

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Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Extended Capacity Heat Pump <input type="checkbox"/> \$1,000 per unit Extended Capacity Heat Pump – Replacing Electric Forced Air Furnace <input type="checkbox"/> \$3,000 per unit	<ul style="list-style-type: none"> Must be primary heating source in a central ducted system, and residence must not have a backup gas heating system Heat pump must be included in Energy Trust's list of qualifying products* Thermostat controls must be set with an auxiliary heat lockout setting per manufacturer's recommendations Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives Projects replacing forced air furnaces must not add additional ductless heads 	Manufacturer: Model: Type of system replaced:	\$		\$

I have attached an AHRI certificate: Yes No - please provide unit information below:

HSPF2	EER2	SEER2			
Thermostat	Compressor control set: °F	Auxiliary heat lockout set: °F			
	Manufacturer	Model Name	Model #		

* Full list of qualifying products: <https://www.energytrust.org/wp-content/uploads/2020/05/Extended-Capacity-Heat-Pump-ECHP-1.22.24-QPL.pdf>

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Web-Enabled Thermostat Incentive

► For all property types

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Smart Thermostat* <input type="checkbox"/> \$100 per unit, self-installed <input type="checkbox"/> \$250 per unit, contractor-installed	<ul style="list-style-type: none"> For self-installed thermostats, space heating may be provided by furnace or ducted heat pump with fuel by participating utility For contractor-installed thermostats, space heating must be provided by gas furnace or ducted heat pump and site must receive electric service from a participating utility. Thermostat must be included in Energy Trust's list of qualifying products* 	Manufacturer: Model:	\$		\$

* Full list of qualifying products: <https://www.energytrust.org/wp-content/uploads/2016/08/Smart-thermostats-QPL.pdf>

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Heat Pump Incentives, continued

► For stacked structures with 5 or more dwelling units only

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Air-Cooled Variable Refrigerant Flow (VRF) Multi-split Ductless Heat Pumps <input type="checkbox"/> \$1.00 per sq ft of area served by VRF	<ul style="list-style-type: none"> VRF systems can serve dwelling spaces and/or corridors. Equipment serving other common spaces does not qualify. Must install dedicated outdoor air supply (DOAS) with energy recovery meeting at least 50% enthalpy recovery efficiency DOAS air must be supplied at a neutral space temperature Each condenser unit must have a rated cooling capacity over 5 tons with variable speed compressor operation and must serve multiple ductless indoor evaporator units Must meet or exceed 2016 CEE Tier 1 air-cooled VRF efficiency levels.* The majority of indoor unit fans must be set to cycle rather than run continuously during occupied hours Electric resistance heating should not be used for pre-heating ventilation air Standard DOAS: Minimum fan efficiency 40% or minimum fan efficiency index target 0.82 High Efficiency DOAS: Minimum fan efficiency 65% or minimum fan efficiency index target 1.55 	Manufacturer:	\$		\$
		Model:			
		Type of system replaced:			

* 2016 CEE Tier 1 VRF Air Cooled efficiency levels listed on pages 4–5 of "Appendix A: 2016 Through 2018 Commercial Unitary Air Conditioning and Heat Pumps Specification; Effective January 12, 2016 through December 31, 2018": Link accessible here: https://www.energytrust.org/wp-content/uploads/2018/07/Appendix_A_2016-18_CEE_ComAHP_UnitarySpec.pdf

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New Rooftop Unit (RTU) with Manufacturer-Installed Advanced Controls Incentives

► For all property types

Equipment	Requirements	Equipment Installed	Installed Cost	Tons	Incentive Requested
New Rooftop Unit (RTU) with Economizer <input type="checkbox"/> \$30 per ton	<ul style="list-style-type: none"> All installed RTUs must be new units with Direct Expansion (DX) cooling and either gas furnace or heat pump heating Must have cooling capacity less than 54 kBtu/h Economizer must be factory-installed or contractor-installed at the same time as RTU Property must receive electricity from a participating utility 	Manufacturer:	\$		\$
		Model:			
			Heating (select) <input type="checkbox"/> Gas furnace or <input type="checkbox"/> Heat pump		
New Rooftop Unit (RTU) with Demand Control Ventilation (DCV) <input type="checkbox"/> \$29 per ton	<ul style="list-style-type: none"> All installed RTUs must be new units with Direct Expansion (DX) cooling and either gas furnace or heat pump heating Economizer must be factory-installed or contractor-installed at the same time as RTU, with DCV included Must serve spaces not required by code to have DCV The property's heating fuel must be provided by a participating utility 	Manufacturer:	\$		\$
		Model:			
			Heating (select) <input type="checkbox"/> Gas furnace or <input type="checkbox"/> Heat pump Space the RTU will serve:		
New Rooftop Unit (RTU) with Variable Speed Supply Fan <input type="checkbox"/> \$100 per ton	<ul style="list-style-type: none"> All installed RTUs must be new units with Direct Expansion (DX) cooling and heat pump heating Gas furnace heating does not qualify Variable speed supply fan and economizer must be factory-installed or contractor-installed at the same time as RTU, with DCV included Must have cooling capacity less than 65,000 Btu/h Property must receive electricity from a participating utility 	Manufacturer:	\$		\$
		Model:			

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Bath Fan Incentives

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Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
High-Efficiency Bath Fan without a Light <input type="checkbox"/> \$13 per unit	<ul style="list-style-type: none"> Must be designated as ENERGY STAR® Most Efficient 2022 Must be rated CFM 70 or higher 	Manufacturer:	\$		\$
		Model:			

Garage Ventilation Incentives

► For all property types

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Garage Exhaust Ventilation Controls <input type="checkbox"/> \$0.50 per CFM less than 30,000 sq. ft. and unconditioned <input type="checkbox"/> \$0.10 per CFM at least 30,000 sq. ft. OR conditioned	<ul style="list-style-type: none"> Installed in fully enclosed parking garage Variable speed control installed on the parking garage exhaust fan(s) and contamination-sensing device (CO sensors with NO2 sensors) employed Parking garage operating hours must be at least 140 hours per week 	Manufacturer:	\$	CFM	\$
		Were the exhaust fans retrofitted to add VFD controls? <input type="checkbox"/> Yes <input type="checkbox"/> No			

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Advanced Rooftop Controls (ARC) Incentives

► For all property types

Equipment	Requirements	Installed Cost	Tons	Incentive Requested
Advanced Rooftop Controls (ARC) – Full Retrofit <input type="checkbox"/> \$300 per ton (for properties with a participating electric utility) <input type="checkbox"/> \$300 per ton (for gas-heated properties without participating electric utility)	<ul style="list-style-type: none"> Property must have at least 500 annual operating hours Existing system must have a nominal cooling capacity of at least 5 tons Existing system must have a single speed supply fan or motor Existing systems equipped with a Variable Frequency Drive (VFD) or a CO2 sensor for Demand Control Ventilation (DCV) do not qualify Existing systems with economizers do not qualify Installed equipment must have a controller with digital, integrated economizer with either differential dry-bulb or differential enthalpy with fixed dry-bulb high-limit shutoff Installed equipment must have a controller with DCV with proportional control based on CO2 sensor reading Installed equipment controls must included on BPA qualifying product list* 	\$		\$
		Equipment Installed		
		Manufacturer:		
		Model:		
Annual Operating Hours:				

Equipment	Requirements	Installed Cost	Tons	Incentive Requested
Advanced Rooftop Controls (ARC) – Lite Retrofit <input type="checkbox"/> \$200 per ton (for properties with a participating electric utility)	<ul style="list-style-type: none"> Property must meet minimum operating hours in the table to the right Existing system must have a nominal cooling capacity of at least 5 tons Existing system must have a single speed supply fan or motor Existing systems equipped with a Variable Frequency Drive (VFD) or an economizer do not qualify Installed equipment must have a VFD and controller for variable speed fan operation Installed equipment controls must included on BPA qualifying product list* 	\$		\$
		Equipment Installed		
		Manufacturer:		
		Model:		
		Annual Operating Hours:		
		Required Minimum Annual Operating Hours:		
		Rooftop Unit Heating Fuel	Participating Utilities	Minimum Annual Operating Hours
Electric or Gas Heat	Electric only	2,500 hrs		
Electric Heat	Gas and Electric	2,500 hrs		
Gas Heat	Gas and Electric	3,500 hrs		

* Full list of qualifying products: <https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/advanced-rooftop-unit-control-qualified-products-list.pdf>

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Central Air Conditioning Incentive

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Equipment	Requirements	Installed Cost	Quantity	Incentive Requested
Central Air Conditioner <input type="checkbox"/> \$100 per unit Must have 14.25-15.19 SEER2 rating <input type="checkbox"/> \$250 per unit Must have at least 15.2 SEER2 rating	<ul style="list-style-type: none"> Minimum outdoor unit + indoor coil 11.4 EER2 Must be a central air conditioner serving a majority of the residence Heat pumps and portable air conditioners do not qualify 	\$		\$

Equipment Installed			
Outdoor Unit Manufacturer:		Outdoor Unit Model	
Outdoor unit SEER2 per manufacturer:	Outdoor Unit + Indoor Coil EER2:	System Capacity (tons)	
Indoor Coil Manufacturer		Indoor Coil Model	
Furnace/Blower Manufacturer		Furnace/Blower Model	
Did this AC unit replace an existing one? <input type="checkbox"/> Yes <input type="checkbox"/> No		Was a heating system installed with the air conditioner? <input type="checkbox"/> Yes <input type="checkbox"/> No	

AHRI Certificate # for installed system*:

* The AHRI certificate must accurately reflect all components of the installed system and show compliance with minimum EER/EER2 and SEER/SEER2 ratings. Complete model numbers for all system components must be provided on the invoice. If certificate indicates Thermostatic Expansion Valve (TXV) and/or Time Delay Relay (TDR) are necessary to achieve certified efficiency rating, the installed system must have those components. Applicable EER2 or SEER2 requirements apply to equipment manufactured after January 1, 2023. If the equipment installed was manufactured prior to January 1, 2023, verify eligibility at <https://www.energytrust.org/incentives/energy-efficiency-standards/>.

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Hydronic Heating Circulator Incentives

► For all property types

Equipment	Requirements	Equipment Installed	Installed Cost	Quantity	Incentive Requested
Single speed ECM <input type="checkbox"/> \$200 per circulator More than 3/4 hp to 2.5 hp or less <input type="checkbox"/> \$300 per circulator More than 2.5 hp	<ul style="list-style-type: none"> Pump motor must be single speed or variable speed electronically commutated motor (ECM) Must be an in-line circulator with a horizontal motor 	Manufacturer:	\$		\$
		Model:			
		Motor Size: hp			
Variable speed ECM <input type="checkbox"/> \$300 per circulator More than 1/2 hp to 2.5 hp or less <input type="checkbox"/> \$750 per circulator More than 2.5 hp	<ul style="list-style-type: none"> Site receives electricity from a participating utility 	Manufacturer:	\$		\$
		Model:			
		hp			

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REMEMBER TO:

- ▶ Complete and sign this application.
- ▶ Attach invoices and all other required project cost documentation for all equipment purchased.
- ▶ Attach a completed IRS Form W-9 or Energy Trust Substitute W-9 form if applicable.
- ▶ Use the **Form 320A: Assign Payment** to authorize payment of the incentive to your contractor or other designated Payee. To assign payment, both Participant and Payee must complete and sign a **Form 320A** and it must be submitted along with this incentive application.

Participant Signature – if you are assigning your incentive, also complete **Form 320A**

Please sign below either manually (ex. handwritten) or electronically (ex. typing your name, drawing your signature on a touchpad or touchscreen, inserting a digital signature, or, if available, by clicking the box).

Signature: By signing below, I represent that (i) I am authorized to enter into this agreement and have read, understand and agree to its **Terms and Conditions** on behalf of the named Participant, (ii) I have completed this application truthfully and accurately to the best of my knowledge, and (iii) the energy efficiency equipment installations have been completed to my satisfaction and all accompanying invoice(s) and other supporting documentation are accurate and complete.

Authorized Representative Signature	Name (printed)	Date
		

FOR MORE INFORMATION: Call 1.877.510.2130, and ask for the Multifamily program.

Terms and Conditions

- 1. Application.** Energy Trust must receive this application with all required accompanying documentation within 90 days of equipment purchase and installation in order to qualify for incentives. Certain limited time offers may require submittal by specific deadlines to qualify for bonus incentives. All required information must be submitted before this application will be processed. By submitting this application to Energy Trust, Participant further represents that (i) none of the equipment requesting incentives has already received an Energy Trust incentive or rebate at the time of purchase, and (ii) none of the equipment requesting incentives will be submitted to the Oregon Department of Energy for self-direct credits. Please retain a copy of this application and any accompanying documentation submitted. Energy Trust's Program Management Contractor (PMC) provides Existing Multifamily program (Program) services on behalf of Energy Trust. Neither Energy Trust nor the PMC will be responsible for any lost documentation pertaining to this application, or any lost or misdirected mail.
- 2. Eligibility.** If Participant may apply for Multifamily Energy Program funding from Oregon Housing and Community Services (OHCS) funding for any equipment listed, Participant must contact the Program to discuss eligibility before submitting this application. Participant further understands and agrees that if it is eligible for OHCS Multifamily Energy Program funding, then Energy Trust is authorized to share information about Participant's incentive application with OHCS for the purpose of determining potential incentive eligibility and funding amounts. Additional eligibility restrictions may apply. Final determination of eligibility for Energy Trust incentives rests solely with Energy Trust.
- 3. Eligible Equipment.** Equipment must be new and must meet Energy Trust energy efficiency specifications to qualify. The specifications and incentive amounts listed in this application, including any bonus amounts, are subject to change. Visit energytrust.org/multifamilyincentives to confirm current Program specifications and incentives. If you, or your contractor are not sure of the specifications, please call us before proceeding.
- 4. Equipment Installation.** Participant represents that (i) it has the right to install the energy saving equipment on the property and site(s) on which the equipment is installed and that any necessary consents have been obtained, and (ii) that all equipment installed and work performed complies with all applicable laws, regulations, and safety, building, environmental, and permitting codes, and any manufacturer instructions.
- 5. Project Cost Documentation.** Participant must submit all sales slips, invoices, manufacturer specification sheets and other pertinent documents itemizing the equipment purchased. The project cost documentation submitted must show (i) the date of purchase and itemized price paid, (ii) size, type, make, and model or part number of equipment purchased, and (iii) a description of any installation or other labor charges. In addition to the required proof of purchase documentation, the Program may require additional site or technical information from Participant, for certain equipment, in order to determine whether it qualifies for incentives. Participant will provide Energy Trust with additional proof of purchase or other requested equipment information upon request. If Participant is leveraging external funding sources to directly reduce all or a portion of the final project costs incurred by Participant for the energy-efficiency equipment (for example, state/federal funding, grants, discounts, rebates, incentives or other similar types of consideration) then Participant is required to notify Energy Trust in writing when submitting the project documentation and Energy Trust's incentive will not exceed an amount equal to the total eligible project cost minus such external funds.

Multifamily Heating, Ventilation and Cooling Incentives

Existing Multifamily | Incentive Application | Form 320_{HVAC}



To be completed by Participant

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TRC is a Program Management Contractor for Energy Trust of Oregon.

6. Payment. Incentives will be paid following (i) installation of qualifying energy efficient equipment at the site address(es) listed, in accordance with Program requirements, (ii) Energy Trust's receipt of this completed application, a complete, accurate, and verifiable **IRS Form W-9 (Request for Taxpayer Identification Number and Certification)** for the incentive check recipient and all required accompanying project cost documentation, and (iii) satisfactory completion of a post-installation verification, if required. Incentives will be paid directly to the named Participant (at the mailing address shown above) unless Participant and its designated Payee sign and submit the **Form 320A: Assign Payment** along with this incentive application. Please allow 60 days from Energy Trust's receipt of all information for delivery of incentive payment. Failure to deliver all required documentation may result in a delay or withholding of payment.

7. Incentives. Funds for incentives are limited and subject to budget availability. Program requirements, including incentive levels and limits, are subject to change without advance notice and may vary by utility service area depending on the pace of demand in each service area and the available incentive budget. The total incentive provided will depend upon the incentives in effect as of equipment purchase date. If any bonus amounts are available for qualifying equipment, the base incentive plus the bonus incentives will never exceed the total documented eligible measure cost. Energy Trust incentives will never exceed the documented total final eligible project costs or Energy Trust's maximum allowable per-project incentive amount. The Program also limits the total amount of incentives that any Participant can receive on a per-site, per-year basis.

8. Verification. Equipment installations may be selected for a post-installation verification. Should Participant's property be chosen for a post-installation verification of the equipment, satisfactory completion of that verification has to occur before payment is issued. This verification is for the purpose of incentive payment only. No warranty is implied.

9. Tax Liability. Energy Trust is not responsible for any tax liability which may be imposed on the Participant as a result of any incentive payment. 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.

10. No Endorsement. Energy Trust does not endorse any particular manufacturer, contractor or product in promoting the Program. The fact that the names of particular manufacturers, contractors, products or systems may appear in the Program does not constitute an endorsement. Manufacturers, contractors, products or systems not mentioned are not implied to be unsuitable or defective in any way.

11. Access and Evaluation. Reviews and evaluations of project work during and after measure installation are a critical part of Energy Trust's evaluation process for energy savings and incentive calculations. Participant agrees to cooperate with any such evaluation as a requirement of its incentive agreement with Energy Trust. Participant agrees to provide Energy Trust and its representatives with (i) reasonable access to the project site(s), obtaining any and all necessary consents, (ii) requested technical and other project documentation related to the installed equipment, and (iii) information about the energy use and operations of the equipment and/or project site(s) for the purposes of evaluating the energy savings during and after project completion. Participant agrees that Energy Trust and its representatives may inform subsequent owners of the project site(s) that Energy Trust has provided services to the project site(s) for the sole purpose of evaluating and facilitating Energy Trust program services.

12. Disclaimer/No Liability. In connection with some applications, Energy Trust will provide incentive funding for energy-saving equipment. Participant understands that, while Energy Trust may provide this funding, neither Energy Trust nor the PMC are supervising any work performed for Participant, and neither Energy Trust nor the PMC are responsible in any way for proper completion of that work or proper performance of any equipment purchased. Participant assumes the risk of any loss or damage(s) that Participant may suffer in connection with the equipment. Energy Trust does not guarantee any particular energy savings results by its approval of this application, or by any other of its actions.

13. Energy Information Release. By signing and submitting this incentive application to Energy Trust, Participant authorizes Energy Trust to access its energy usage data, including without limitation interval data, for all of Participant's electric and gas utility accounts at the physical address(es) of the project as listed. Participant agrees to provide other reasonable assistance to Energy Trust to obtain such information. Participant further authorizes Energy Trust to discuss its energy efficiency efforts with its utility account representative(s).

14. Information Release. Participant agrees that Energy Trust may include some or all of the following information in reports to the legislature, Oregon Public Utility Commission (OPUC), funding utilities, and other government agencies as necessary to meet Energy Trust responsibilities and regulatory requirements: Participant's name, site address, general description of the type of energy saving or renewable project implemented (e.g. lighting, HVAC, solar PV), Energy Trust services or incentive payments provided to the Participant, and any energy saved or generated as a result of Energy Trust services or incentives. Energy Trust will treat all other information gathered as confidential and report it to such agencies only in the aggregate.

15. Governing Law. This agreement shall be exclusively governed by and construed in accordance with applicable Oregon law, without regard to any conflicts of laws rules thereof.