

Home Energy Savings Program HVAC Services Incentive Application

California Customers Only



Let's turn the answers on.

Thank you for being wattsmart and making your home more energy-efficient.

Please find guidelines below to determine if you qualify for an incentive and for directions on how to complete your incentive application. If approved, the incentive check will be issued to the primary name on the utility account. Incentive checks are issued within 45 days of receipt of your completed and approved application.

All required documentation must be postmarked **within 90 days of work completed date**. Please make a copy for your records and submit completed application and required documents to:

Pacific Power - Home Energy Savings program
Attn: CA HVAC
818 S.W. 3rd Avenue #215, Portland, OR 97204

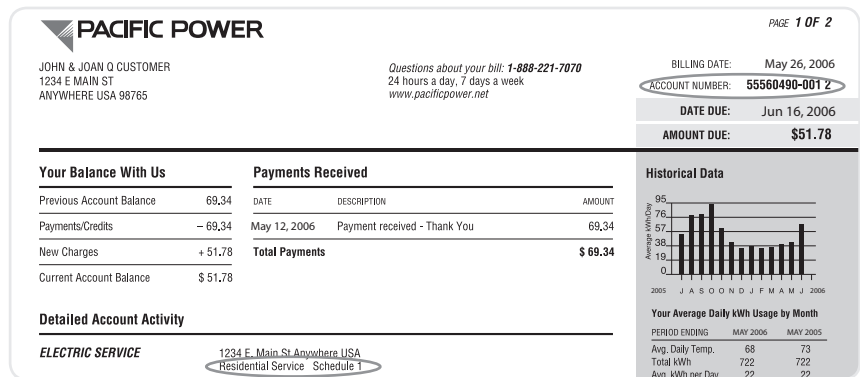
Need help? Call 1-800-942-0266 or visit our website at pacificpower.net/hes

*This application is for work
completed on or before
May 11, 2014.*

Getting started

- Follow best practices for hiring a trade ally*
 - Check website for list of **qualified** program trade allies
 - Get multiple bids
 - Check licenses and references
 - Have a signed written proposal before work begins
- Confirm equipment or service qualifies for program incentives
 - Check the program website (pacificpower.net/hes)
 - Call the customer hotline 1-800-942-0266
 - Ask qualified program trade ally
- Check your bill to locate your account number and confirm service is on qualifying rate schedule D, DL-6, DS-8, DM-9 or NEM-35 (see image)

*A trade ally is a contractor or retailer who sells or installs equipment or performs services for home energy upgrades



Customer required documentation (incomplete applications may be delayed or denied)

For resources to help you fill out your application, visit pacificpower.net/caforms

- Completed application
- Itemized receipt/trade ally invoice including:
 - Description of qualified products and services (include all equipment model numbers and services)
 - Itemized costs
 - Work initiated **and** work completed dates
- Any additional "Required Documentation" for each incentive (listed in each incentive section)
- Copy of completed W-9 (for businesses receiving incentives)

Customer information

Customer or landlord account number _____

For account number call toll free 1-888-221-7070 or log in at pacificpower.net

Name on account _____ Daytime phone (_____) _____

Installation address _____ City _____ State _____ Zip _____

Mailing address _____ City _____ State _____ Zip _____

Email address _____ ☐ Email is the best way to contact me (Email policy located in Terms & Conditions)

- ☐ **Multifamily installation:** please check this box if this project was a multifamily installation (five or more attached units). Contact the program at 1-800-942-0281 for additional multifamily requirements including the mandatory pre-qualification and post-inspection process.

Household information

Your information will not be shared. It is used to determine eligibility, calculate energy savings and to improve our program.

Year house built (Required) _____		House square footage/living space (Required) _____		
Previous primary heat source: (Required) <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Electric ceiling/wall heat <input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric heat pump <input type="checkbox"/> Ductless heat pump <input type="checkbox"/> Natural gas furnace <input type="checkbox"/> _____	Current primary heat source: (Required) <input type="checkbox"/> Electric baseboard <input type="checkbox"/> Electric ceiling/wall heat <input type="checkbox"/> Electric furnace <input type="checkbox"/> Electric heat pump <input type="checkbox"/> Ductless heat pump <input type="checkbox"/> Natural gas furnace <input type="checkbox"/> _____	Previous primary cooling source: (Required) <input type="checkbox"/> Central air conditioner <input type="checkbox"/> Evaporative cooler <input type="checkbox"/> Electric heat pump <input type="checkbox"/> None <input type="checkbox"/> _____	Current primary cooling source: (Required) <input type="checkbox"/> Central air conditioner <input type="checkbox"/> Evaporative cooler <input type="checkbox"/> Electric heat pump <input type="checkbox"/> None <input type="checkbox"/> _____	Current water heater fuel: <input type="checkbox"/> Electric <input type="checkbox"/> Natural gas <input type="checkbox"/> Propane <input type="checkbox"/> _____
Do you rent or own? <input type="checkbox"/> Rent <input type="checkbox"/> Own	What is the age of the Pacific Power account holder? <input type="checkbox"/> 18 - 25 <input type="checkbox"/> 26 - 35 <input type="checkbox"/> 36 - 45 <input type="checkbox"/> 46 - 55 <input type="checkbox"/> 56 and over	Household income – approx. <input type="checkbox"/> up to \$24,999 <input type="checkbox"/> \$25,000 - \$34,999 <input type="checkbox"/> \$35,000 - \$49,999 <input type="checkbox"/> \$50,000 - \$74,999 <input type="checkbox"/> \$75,000 - \$99,999 <input type="checkbox"/> \$100,000 +	How did you hear about the Home Energy Savings program? <input type="checkbox"/> Friend/referral <input type="checkbox"/> Event <input type="checkbox"/> Trade ally <input type="checkbox"/> Retailer sales staff <input type="checkbox"/> TV/radio ad <input type="checkbox"/> Print ad <input type="checkbox"/> Bill stuffer <input type="checkbox"/> Online <input type="checkbox"/> Other _____	If you have seen program materials featuring a special code, please provide it here. Code _____
What is your gender? <input type="checkbox"/> Male <input type="checkbox"/> Female	Household size: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 +			

Qualifications

- Incentives are available for existing homes only and must be completed by a **qualified** program trade ally. A list of program trade allies is available at pacificpower.net/catradeallies.
- Incentive amount cannot exceed the total cost of the project.
- All required documentation must be postmarked within 90 days of work completed date. Invoice requirements provided under “**Customer required documentation**” on page 1.
- Qualified program trade allies are required to complete measure specific program worksheets that must be submitted with the incentive application.
- Additional incentive-specific qualifications are listed in the tables below.

Additional incentives

- HVAC equipment (including heat pumps, central air conditioners, etc.) and new homes incentives also available. Visit pacificpower.net/hes for details.

Please indicate the incentive(s) you are applying for by checking the applicable box(es):

☐ **Central air conditioner tune-up**

Requirements	Required documentation	Customer incentive	Trade ally incentive
<ul style="list-style-type: none"> • Work must be completed by a qualified program trade ally • Incentive available on existing central air conditioners only • Existing central air conditioner must serve at least 80% of the home's conditioned floor area • Air flow test and performance check are required: <ul style="list-style-type: none"> - Air flow must meet minimum 350 CFM per ton requirement - Ask a qualified program trade ally about options for performance check - Program requirements outlined in the Tune-up worksheet and California HVAC Trade Ally Program Manual • Central air conditioner tune-up may only be performed when outdoor temperatures are above 65° F following performance check protocols • Incentives are limited to one tune-up incentive per unit every five years 	<ul style="list-style-type: none"> • Itemized receipt/trade ally invoice • Completed Tune-up worksheet • W-9 (for businesses receiving incentives) 	\$50	\$25
Does central air conditioner serve at least 80% of home's conditioned floor area? <input type="checkbox"/> Yes <input type="checkbox"/> No			

☐ **Heat pump tune-up**

Requirements	Required documentation	Customer incentive	Trade ally incentive
<ul style="list-style-type: none"> • Work must be completed by a qualified program trade ally • Incentive available on existing heat pumps only • Existing heat pump must serve at least 80% of the home's conditioned floor area • Air flow test and performance check are required: <ul style="list-style-type: none"> - Air flow must meet minimum 350 CFM per ton requirement - Ask a qualified program trade ally about options for performance check - Program requirements outlined in the Tune-up worksheet and California HVAC Trade Ally Program Manual • Heat pump tune-up may be performed year round following performance check protocols • Incentives are limited to one tune-up incentive per unit every five years 	<ul style="list-style-type: none"> • Itemized receipt/trade ally invoice • Completed Tune-up worksheet • W-9 (for businesses receiving incentives) 	\$75	\$25
Does heat pump serve at least 80% of home's conditioned floor area? <input type="checkbox"/> Yes <input type="checkbox"/> No			

Customer acceptance of terms

I hereby certify that all information is accurate including claims of customer and equipment and service information. I confirm that the improvements I installed were not required by code. I understand that information related to the completeness of my application may be shared with trade allies. I also understand that the status of my application may be shared with third parties on an aggregated basis. I have read all terms and conditions and acknowledge that Pacific Power may verify all the information provided. Incentive checks are paid to the Pacific Power account holder. Customers are responsible for payment to trade allies.

Customer signature _____ Date _____

Trade ally requirements

- Ensure that requested service qualifies for program incentives
- Conduct work in accordance with all program requirements
- Work with your customer to submit all required paperwork (must be postmarked within **90 days of work completed date**)

Trade ally information

Company name _____ Daytime phone (_____) _____

Mailing address _____ City _____ State _____ Zip _____

Technician name _____

Trade ally acceptance of terms

I hereby certify that all information is accurate including claims of customer and equipment and service information. I have read all terms on this application and acknowledge that Pacific Power may verify all the information provided. Customer personal information and account number will not be shared with trade allies or their representatives. The status of customer incentive applications that are missing required information or were not qualified may be shared only with the trade ally or their representatives associated with each individual incentive application.

Trade ally signature _____ Date _____

Terms and conditions

Pacific Power offers incentives through a variety of programs that focus on energy efficient products. When you (the "Customer") participate in these programs, you can save energy and money while reducing your impact on the environment. This application ("Incentive Application") is intended to guide you through the steps necessary to receive an Incentive ("Incentive") under the Home Energy Savings program ("program"). The program is administrated by Portland Energy Conservation, Inc. ("PECI"). The program may require engaging a qualified trade ally ("trade ally") in order to qualify for Incentives. Customer is responsible for paying for all trade ally services.

Incentive availability

Incentives are available on a first-come, first-served basis according to the postmark date on the application. Please reference the program website at pacificpower.net/hes to determine the current status of incentive availability. All services must be purchased and installed prior to submitting an Incentive Application. Applications must include all information requested. Failure to provide this information may result in delays. If required information is not provided within 90 days of application submittal, the Incentive Application will be denied. Incentive will not exceed purchase price. Additional terms and conditions may apply. Incentives are subject to tariff approval and may change with 45 days of notice. Please visit pacificpower.net/hes for current program requirements.

Qualifying customers

Residential electric customers residing in the state of California who purchase their electricity from Pacific Power on rate schedules D, DL-6, DS-8, DM-9 or NEM-35 qualify. Landlords who own rental properties served by the company in the state of California where the tenant is billed on rate schedules D, DL-6, DS-8, DM-9 or NEM-35 also qualify for this program. You can find your rate schedule on your bill, by calling toll free 1-888-221-7070 or by logging in at pacificpower.net. Incentive checks will be issued in the name of the customer on the qualifying account.

Customer responsibilities

Customer agrees to indemnify and release PEGI, and Pacific Power their affiliates, officers and employees from all claims, demands, losses, damages, costs, expenses and liability (legal, contractual or otherwise), which arise from or are in any way connected with any: (1) injury to or death of persons, (2) injury to property of Customer, (3) violation of any applicable laws, statutes or ordinances, or (4) any act omission or negligence of the trade ally.

Customer will allow, if requested, a representative from PEGI, Pacific Power, or any authorized third party reasonable access to Customer's property for inspections, including but not limited to: (a) post-installation equipment inspection to check implemented measures and to verify compliance with the program requirements; and (b) post-operation inspection to verify energy savings of the measures after a period of operation; and (c) inspection for any other reason. Customer also consents to PEGI's use of Customer's name, program services, and resulting energy savings in reports or other documentation.

Customer will obtain the approval of the property owner where the measure is to be installed prior to installation if Customer is not the owner. Customer agrees that information collected in this application may be used for marketing purposes. In addition, Customer acknowledges that information included in this application may be subject to public records requests as required by law.

Customer and PEGI shall comply with all applicable laws at all times. It is Customer's responsibility to obtain all licenses, permits or other approvals required for installation of products or measures under the program. Customer is solely responsible for proper disposal of any and all removed products.

Customer is solely responsible for the economic and technical feasibility, operational capability and reliability of Customer's installations, products and solutions. PEGI and Pacific Power make no representation or warranty and assume no liability with respect to services of any trade ally, quality, safety, performance or other aspect of any design, system or appliance installed pursuant to the program or this Incentive Application and expressly disclaim any such representation, warranty or liability. Under no circumstances shall PEGI or Pacific Power be liable for any monetary damages related to the program including any action or inaction of trade ally's performing work under the program. All projected savings are intended to be estimates and PEGI and Pacific Power do not guarantee any level of savings.

The customer hereby transfers to Pacific Power all "Environmental Attributes" attributable to the Qualifying Equipment or its operation. Environmental Attributes include any and all credits, benefits, emissions reductions, offsets and allowances, howsoever entitled, resulting from the avoidance of the emission of any substance to the air, soil or water at or by PacificCorp generating facilities through reduced generation of energy or other savings or offsets on account of the Qualifying Equipment.

The customer will not claim ownership of any Environmental Attributes. As long as the customer at the same time states the Qualifying Equipment was made possible with funding from Pacific Power, the customer may claim that it is facilitating the production of the Environmental Attributes attributable to the Qualifying Equipment.

Jury waiver

To the fullest extent permitted by law, each of the parties hereto waives any right it may have to a trial by jury in respect of litigation directly or indirectly arising out of, under or in connection with this agreement. Each party further waives any right to consolidate any action in which a jury trial has been waived with any other action in which a jury trial cannot be or has not been waived.

Application timeline

Incentive Application and required documents must be postmarked within 90 days of work completed date. Incentive checks are issued within 45 days of receipt of the completed and approved Incentive Application. Incentives are not to exceed the purchase price of the equipment or service. Equipment and service work may be inspected for compliance. Incentives are subject to tariff approval and may change with 45 days notice. Additional terms and conditions may apply.

Application details

If your application is selected for inspection, it will not be processed until the review is satisfactorily completed.

Pacific Power issues incentives in the form of checks not utility bill credits. Pacific Power is not responsible if your trade ally provides inaccurate information about the amount and/or conditions of the actual incentive and Pacific Power will not pay incentives for equipment that is mislabeled or misrepresented by trade allies regarding incentive qualifications. Households receiving incentives under the Home Energy Savings program may not receive equipment purchase and installation incentives under other Pacific Power company programs.

By providing Pacific Power with your e-mail address you agree that we may send you e-mails, occasional "breaking news" alerts and promotions from Pacific Power's Home Energy Savings program. We may also e-mail you occasionally with updates and information about the program. Should we elect to change our privacy policy we will post the changes at pacificpower.net/hes. Where the changes are significant, we may also choose to e-mail all our registered users with the new policy details.

Incentive Application must be postmarked within 90 days of work completed date.