



Residential Energy Tax Credit Program

2010 HVAC Company Listing Process for Oregon Residential Energy Tax Credit

January 4, 2010

Thank you for your interest in the Oregon Residential Energy Tax Credit program. In order for air source heat pump, ground source heat pump and duct sealing jobs to qualify for the state energy tax credit, your company must employ PTCS or CheckMe certified technicians and your company must be listed with the Oregon Department of Energy. There is no charge for this listing. (There are no technician or listing requirements for qualifying furnace, boiler and water heaters for the state tax credit.) Heat pump or duct installations will not be eligible for the tax credit until your company is listed with ODOE.

In order for your company to be listed for heat pump and duct sealing please fill out the attached application. Then your company must have at least two key people participate in a short telephone conference call to review tax credit program requirements and procedures. We will notify you of the time and date of the next conference call after we receive your application. We strongly encourage everyone in your company who talks with customers about the tax credit program, including sales staff and rebate coordinators, to participate in one of these calls. Complete information about HVAC technologies can be found at:

<http://www.oregon.gov/ENERGY/CONS/RES/tax/HVAC-Technicians.shtml>

For 2010 we have revised the tax credit application forms for several HVAC technologies. Please download and begin using new tax credit application forms for furnaces, boilers, water heaters, and ground source heat pumps at:

<http://oregon.gov/ENERGY/CONS/RES/RETC.shtml>

We receive a significant number of incomplete tax credit applications for all HVAC technologies and need your help. You can speed up your customers getting their tax credit certification by paying attention to the following items:

1. **AHRI number and full equipment model numbers are required on all applications and final invoice** – verify that the equipment you're installing meets program requirements at AHRIDirectory.org
2. **Customer equipment cost** must be itemized on final invoice –this is required in order to calculate the tax credit amount (This is the retail price you are charging your customer for the equipment-only);
3. **Rental property installations** should apply using the paperwork for the Business Energy Tax Credit (BETC) program. See the BETC pages on our web site for eligibility requirements, pre-installation approval procedure and forms.

If you have questions about the Residential Energy Tax Credit program and eligibility requirements please see our web site, then feel free to contact us by email or phone. Thank you.

Dave Brook
503-378-8534 dave.brook@state.or.us

Oregon Department of Energy, 625 Marion Street NE, Salem, Oregon 97301
1-800-221-8035 or 503-378-4040 www.oregon.gov/energy RETC.Program@state.or.us



Oregon Residential Energy Tax Credit Program

Application for Company Listing Heat Pump, AC & Duct Sealing

The Oregon Department of Energy maintains a list of companies qualified to install and verify the performance of heat pump, central air conditioning and ducts for the Oregon Residential Energy Tax Credit. In order to be listed a company must meet the following requirements:

- Employ technicians in good standing with the Performance Tested Comfort Systems program (PTCSNW.com) or Proctor Engineering CheckMe programs.
- Read the attached materials describing the Oregon Residential Energy Tax Credit procedures and expectations of listed companies.
- Complete, sign and return this application and agreement

Systems will not be eligible for the Oregon Residential Energy Tax Credit until your company listing application is approved. When it is, your company name, phone, Web site and technologies will be displayed on our Web site and printed lists. This listing will apply to the calendar year 2010 as long as you continue to employ technicians in good standing with the PTCS or CheckMe programs and do not violate program guidelines.

1. Company Information **Renewal** **First Time Listing** **Date** _____

Company			
Mail Address			
City, State, Zip			
Main Phone		CCB #	
Fax			
Main Email *			
Web Site URL			
Region Served	<input type="checkbox"/> Coast <input type="checkbox"/> Portland metro <input type="checkbox"/> Willamette Valey <input type="checkbox"/> Columbia Gorge <input type="checkbox"/> So. Oregon <input type="checkbox"/> Central Oregon <input type="checkbox"/> East. Oregon <input type="checkbox"/> K. Falls/ Lakeview		

* At least one email address is required. Used by us to provide updates; will not be published.

2. Key Personnel (General manager, Installation manager, Rebate coordinator, etc.)

Name	Title	Direct Phone (if any)	Direct Email (if any)



3. PTCS/CheckMe Technicians Employed (as of the date of this application)*

Name	PTCS ID	Certification
		<input type="checkbox"/> Heat Pump/AC <input type="checkbox"/> Duct
		<input type="checkbox"/> Heat Pump/AC <input type="checkbox"/> Duct
		<input type="checkbox"/> Heat Pump/AC <input type="checkbox"/> Duct
		<input type="checkbox"/> Heat Pump/AC <input type="checkbox"/> Duct

* Verify that PTCS listings for these technicians shows them working for your company at PTCSNW.com

4. Company Agreement and Signature

As a Residential Energy Tax Credit Program Tax Credit Listed Company , our company agrees to:

- Obtain permits as required and install systems in accordance with local building codes
- Correct any deficiencies in the installation as required in follow-up inspections
- Provide system owners with two-year full written warranty
- Provide the system owner with an owner’s manual and demonstrate the proper operation and maintenance of the system to them (except ducts)
- Explain the Oregon Residential Energy Tax Credit application process to the owner and fill out application forms with required technical information
- Not make false claims regarding the Oregon Department of Energy or tax credit certification

I certify that key personnel of this company have read the *Tax Credit Certified HVAC Technician Information* (available at www.Oregon.gov/Energy). From time to time we may provide updates using the email address(es) or fax supplied on this application.

I certify that the information on this application is accurate to the best of my knowledge.

I understand that failure to meet these requirements are grounds for revocation of the company listing by the Oregon Department of Energy.

Printed Name

Title

Signature

Date Signed

You may fax this application directly to us at 503-378-6000.



2010 Oregon Residential Energy Tax Credits HVAC & Water Heating Systems

System Type	Equipment Performance Requirement	Installation (See our Web site for full requirements)	Tax Credit (Lesser of 25% of equipment cost or amount shown)
Heat Pump	HSPF 9+ EER 12+	Must be verified by tax credit listed company using <i>CheckMe</i> or BPA <i>Performance Tested Comfort System (PTCS)</i> protocol; eligible for HP/AC Installation tax credit (below)	Up to \$300 - \$430 depending on efficiency
Central Air Conditioner	EER 13+		Up to \$160 - \$300 depending on efficiency
Heat Pump/AC Installation or Service	Must be verified by Tax credit listed company that system meets CheckMe or BPA PTCS specs for refrigerant charge and air flow		Up to \$250
Duct Sealing	Maximum leakage depending duct system type	Must be verified by a tax credit listed company	Up to \$250 Bonus tax credit of \$150 if done at same time as furnace, heat pump/AC installation
Ground Source Heat Pump (Geothermal or Geo-Exchange)	Closed Loop – 3.3 COP Direct Exp.– 3.5 COP	Must be installed by tax credit certified technician	Up to \$600 - \$900 depending on size
Gas Furnace	92% AFUE and AHRI “e-rated” blower	Outside combustion air	Up to \$350
Gas/Oil Boiler	92% AFUE	Must have outside temperature reset	Up to \$230
Ductless “mini-split” heat pump	Variable speed compressor “inverter technology”	Must be installed by factory-trained technician	Up to \$400
Gas Water Heater (tankless or condensing tank types)	EF 80%	Tankless water heaters must have low firing rate of no more than 24,000 BTU/hr. and high firing rate of no less than 140,000 BTU/hr.	Up to \$340
Heat Pump Water Heater	COP >1		Up to \$215 - \$560
“Combo” Systems (water heating / space heating)	Use Premium Efficiency Water Heater efficiency specifications (above)		Same as water heater
Air Handler (with hydronic system)	Air handler alone or with HRV/ERV	ECM (“variable speed”) blower motor*	Up to \$125 - \$345
Whole House Ventilation (heat recovery and energy recovery)	See Web site for specific performance criteria		Up to \$150 - \$430

Oregon Residential Energy Tax Credit standards are different than Energy Star, utility programs and Federal Energy Tax Credit performance criteria. In hybrid heating systems (heat pump with natural gas or propane backup), only the primary heating system is eligible for a tax credit.

Information about the federal energy tax credits can be found at: <http://www.energystar.gov/>

Oregon Department of Energy, 625 Marion Street NE, Salem, Oregon 97301
1-800-221-8035 or 503-378-4040 www.oregon.gov/energy RETC.Program@state.or.us



Oregon Residential Energy Tax Credit Program

Required Paperwork for HVAC Applications

In order to receive a Residential Energy Tax Credit (RETC) an Oregon resident must submit a tax credit application and provide a copy of the HVAC installer's final paid receipt with the following information. The contractor must provide the following information on the application forms.

	Required Information on Final Receipt	RETC Application Process
Gas Furnace and Boiler	Equipment brand name and full model number AHRI reference number of equipment required (See http://www.ahridirectory.org) Customer equipment-only cost (retail) Total job price If needed: statement that installation meets optional requirements – i.e. "2 pipe install"	Installer fills out sections 2 and 3 of tax credit application and provides tax credit application to the customer.*
Heat Pump Central AC <i>(Only Tax Credit Certified Technicians can qualify a system for state tax credit)</i>	Equipment brand name and full model numbers of inside and outside units AHRI reference number of outdoor unit required (See http://www.ahridirectory.org) Cost of any controls needed to meet tax credit installation requirements – e.g. TXV etc. Customer equipment-only price (retail) Customer cost of CheckMe or PTCS commissioning (if any) Cost of any labor and materials needed to pass CheckMe/PTCS test (i.e. air flow improvements) Total job price	Tax credit listed HVAC company provides tax credit application to the customer. (Note there are 2 tax credits for a new heat pump: one based on the cost of qualified equipment and a separate tax credit based on the cost of the commissioning test, as itemized on the final invoice. If the cost of the CheckMe or PTCS test is not itemized no tax credit for commissioning will be calculated)
Duct Sealing* <i>(Only Tax Credit Certified Technicians can qualify a system for state tax credit)</i>	Total cost of duct sealing labor and materials (itemize cost of duct insulation separately) Price of duct design (if any, for new duct system)	Tax credit listed HVAC company provides tax credit application to the customer.
Ductless Heat Pump	Equipment brand and model numbers AHRI reference number of outdoor unit required (See http://www.ahridirectory.org) Customer equipment-only price (retail) Total job price	Technician fills out sections 2 & 3 of tax credit application form and provides to customer. (No start up page required.)
Ground Source Heat Pump <i>(Only Tax Credit Certified Technicians can qualify a system for state tax credit)</i>	Equipment brand name and full model number(s) with rated heat output (tonnage) Total job price	Technician fills out sections 2, 3 and 4 of tax credit application form and provides to customer. Provide customer with manufacturer's specification sheet showing rated COP at 50° F.*

* If tax credit eligible duct sealing is done at the same time as a tax credit eligible furnace or heat pump installation the customer is eligible for a bonus tax credit of \$150 in addition to the individual credits.

Tax credits for heating systems installed in rental property must be applied for under the Business Energy Tax Credit program, which has different technical requirements and application procedures. See our Web site for details.