

Oregon Residential Energy Tax Credit

# Required Paperwork for HVAC Applications

In order to receive a Residential Energy Tax Credit (RETC) the customer must submit an application along with a copy of an itemized final invoice and any required documentation provided by the heating contractor as described below.

	Information Required on Final Receipt	RETC Application Process
<b>Heat Pump Central AC</b>  (Only Tax Credit Certified Technicians can qualify a system for state tax credit)	Brand and full model numbers of inside and outside units ARI reference number of equipment (See <a href="http://www.ahridirectory.org">http://www.ahridirectory.org</a> ) Cost of any controls needed to meet tax credit installation requirements – i.e. TXV, LSV or TDR Customer equipment price (retail) Customer cost of CheckMe or PTCS commissioning (if any) Cost of any labor and materials needed to get system to pass CheckMe/PTCS test (i.e. air flow improvements) Total job cost	Tax credit application is sent to homeowner directly from CheckMe (Proctor Engineering) or PTCS program within 2 weeks of job completion.  (Note there are 2 possible 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.)
<b>Ground Source Heat Pump</b>  (Only Tax Credit Certified Technicians can qualify a system for state tax credit)	Equipment brand and full model number with rated COP Customer equipment cost Total job cost	Technician fills out sections 2, 3 and 8 of tax credit application form and provides to customer. Provide customer with manufacturer's specification sheet showing rated COP.*
<b>Gas Furnace and Boiler</b>	Equipment brand name and full model number Customer equipment cost (retail) Total job price Statement that installation meets optional requirements to meet RETC standard – i.e. "2 pipe install"	Installer should fill out sections 2 and 3 of tax credit application and provides to customer.*
<b>Duct Sealing*</b>  (Only Tax Credit Certified Technicians can qualify a system for state tax credit)	Customer cost of duct testing Total cost of duct sealing labor and materials Price of duct design (if any, for new duct system)	PTCS worksheet submitted to utility or Energy Trust, which forwards to PTCS to issue tax credit application directly to customer).
<b>Ductless Heat Pump</b>	Equipment brand and model numbers ARI reference number (See <a href="http://www.ahridirectory.org">http://www.ahridirectory.org</a> ) Equipment price (retail) Total job price	Technician fills out sections 2 & 3 of tax credit application form and provides to customer. Provide customer with copy of system "start up" or "test running" page(s) from manufacturer's installation instructions to submit with tax credit application.

\* If duct sealing is being done at the time of qualifying furnace or heat pump installation the customer is eligible for a bonus tax credit of \$150.

*Tax credits for heating systems installed in rental property are processed by the Business Energy Tax Credit program with different requirements and procedures. See our Web site for details.*



**Sample receipt for Oregon Dept. of Energy Residential Energy Tax Credit program showing required breakout of information**

**Everyday Heating  
1313 Mocking Bird Lane  
Anywhere, USA 12345**

Date of Install:

Customer Name:

Installation Address:

Brand Name of System:

HP/AC Outdoor Unit #:

HP/AC Indoor Coil or Air-Handler/Furnace model #:

Outdoor thermostat, LSV, TXV or TDR (if required to meet performance spec):

ARI Reference number (for heat pump/AC):

Two-pipe system (if furnace can be installed either way): statement on receipt

Unit Price (excluding labor): \$

Cost of Commissioning/Tune-Up: \$

Total Job Cost: \$

**Premium Efficiency Duct Systems** (Transfer to Duct application form and to Heat Pump or AC System application form, if applicable.)

Duct testing cost	\$
Duct repair/seal labor, materials and additional installation cost (e.g. added returns)	\$
New duct system sealing labor and additional installation cost (e.g. multiple returns)	\$
Cost to bring whole HVAC system inside on new home construction	\$
HVAC system/duct design cost	\$

**Paid in full:** Date paid in full