



OREGON
DEPARTMENT OF
ENERGY

Guidelines to Residential Energy Tax Credit Certification Requirements

Effective December 1, 2007
Updated February 21, 2008

Oregon Department of Energy
625 Marion Street NE
Salem, Oregon 97301-3737
(503) 378-4040 or Toll-Free 1-800-221-8035
Fax (503) 373-7806

Certification Requirements

This document outlines the Oregon Department of Energy requirements for both the tax credit certified technician and for the company that employs the technician. The purpose of the tax credit certification process is to support performance and quality expectations associated with receiving a state tax credit for a specified technology. If there is any conflict between this document and the Oregon Administrative Rules (OARs) 330-070-0010 to 330-070-0097, the OARs prevail. This document is updated on an as-needed basis.

Contents

Tax Credit Verification.....	1
Company Listing	1
Obtaining Tax Credit Certification.....	2
Maintaining Tax Credit Certification	4
Contacts	4
Enforcement Process	4

Tax Credit Verification

To be eligible for a state tax credit, **ALL** solar electric*, solar thermal*, geothermal heat pump, performance tested ducts and air source heat pump/air conditioning systems **must be verified** by an Oregon tax credit certified technician. The person who signs the verification line of the tax credit application must be a tax credit certified technician. Verification indicates that the system was installed according to building codes and met the Oregon Department of Energy performance and quality requirements. The tax credit certified technician must have met the technology-specific qualifications and signed an agreement with the Oregon Department of Energy that articulates these requirements. A tax credit certified technician must update this agreement annually. See Maintaining Status section for further details.

The tax credit certified technician’s role is to help ensure that both quality and performance standards are met. This is different from code-required inspection that assures fire, life and safety requirements are met. A tax credit certified technician must hold appropriate license for the work that he/she performs that requires licensure. For example, all electrical work on a solar installation must be done by a licensed electrician. Be aware, that to legally perform construction work in Oregon a technician must be employed by a company that is registered with the Oregon Construction Contractors Board (CCB) and is properly licensed and bonded.

Tax credit certification status applies to a person (the technician). Certification is technology-specific and limited to the technologies which the person has expertise. Certification is **NOT** a guarantee that the technician is sufficiently qualified to do the work. Certification is simply a means of identifying those individuals that understand the tax credit process and have made a commitment to quality and performance of tax credited technologies.

Company Listing

The Oregon Department of Energy (ODOE) will publish a list of companies that employ at least one tax credit certified technician. This listing is intended to help consumers find companies with a genuine commitment to technology that qualifies for an energy tax credit. We recommend that office staff who process tax credit applications for ODOE-listed companies participate in the ODOE telephone conference call update on an annual basis. The update is required of the certified technicians and will help office staff process the paperwork for the technician and the customer.

* Homeowner-installed solar electric and solar thermal systems will be handled on a case-by-case basis.

Obtaining Tax Credit Certification

To do work in Oregon, a technician applicant must be the employee (or owner) of a company that is properly licensed and bonded and is currently registered with the Oregon Construction Contractors Board (CCB). A technician applicant must also demonstrate expertise by taking Oregon Department of Energy (ODOE) tax credit training (see below). Lastly, a technician applicant must prove that he/she meets the minimum combination of technical training or appropriate work experience for the technology as specified below. These requirements apply to all technicians, regardless of past status on ODOE's tax credit certification listing. Tax credit technicians must notify ODOE of any changes in application information within 30 days of the change.

ODOE Tax Credit Training

Each year ODOE will offer at least two opportunities for technician applicants (and employing company staff who desire) to receive tax credit training. These training opportunities will generally be associated with the Brightway to Heat Water™, Northwest Energy Education Institute, Energy Trust of Oregon training classes or other ODOE-approved technical training classes. ODOE will provide additional tax credit training opportunities on an as-needed basis. The ODOE training is about the tax credit program, process and forms used, and performance requirements. It is approximately 1.5 hours in length. It is not a technical training.

Technical Expertise

The following sections describe what training or experience is need for each specific technology. These requirements were developed in collaboration with each technology's appropriate trade association. These trade associations are an excellent source of information about where one can obtain training and experience. Contact information for these associations is provided in the Contacts Section.

Photovoltaics

Photovoltaics certification applies to both on-grid and off-grid solar electric systems. A technician applicant must provide proof of meeting one of the following options:

Option A –Third-party certification or licensure (Show proof of one of the following:)

- North American Board of Certified Energy Practitioners (NABCEP) PV Installer Certification
- NABCEP PV Entry Level Certification
- Limited Renewable Energy Technician (LRT) license

Option B – Competency test

- Score 70 percent or above on the ODOE competency test for photovoltaics. The test will include, but not be limited to, questions on sun charts, system components and design, system performance, system quality, and tax credit program basics. You will need to bring a calculator. The approximately 1-hour competency test can be offered at Oregon Solar Energy Industries Association (OSEIA) meetings and training classes, at Energy Trust of Oregon (ETO) training classes, at the Oregon Department of Energy office in Salem or at other locations as needed. Call 1-800-221-8035 to arrange for testing. Technician applicants who fail to achieve the passing 70 percent score, may retake the test at the next available opportunity.

Solar Water Heating

Solar Water Heating certification applies to hydronic systems that heat domestic water, provide space conditioning or pool heating. A technician applicant must provide proof of meeting one of the following options:

Option A – Third party certification or licensure (Show proof)

- Solar Thermal License (STL)
- NABCEP Solar Thermal Installer Certification

Option B – Competency test

- Score 70 percent or above on the ODOE competency test for solar thermal. The test will include, but not be limited to, questions on sun charts, system components and design, system performance, system quality, and tax credit program basics. You will need to bring a calculator. The approximately 1-hour competency test can be offered at Oregon Solar Energy Industries Association (OSEIA) meetings and training classes, at Energy Trust of Oregon (ETO) training classes, at the Oregon Department of Energy office in Salem or at other locations as needed. Call 1-800-221-8035 to arrange for testing. Technician applicants who fail to achieve the passing 70 percent score, may retake the test at the next available opportunity.

Geothermal Heat Pump (Show proof:)

- International Ground Source Heat Pump Association training (IGSHPA) or an IGSHPA certified manufacturer's installer training program or other training approved by the Oregon Department of Energy Director taken within the past five years. (Fusion training by itself is not considered sufficient.)
- If IGSHPA or other training is more than five-years-old, applicant must also complete within the past year a two-hour relevant installer training, community college HVAC course or other training approved by the ODOE Director.

Performance Tested Duct System (One of the following:)

- Performance Tested Comfort Systems (PTCS) class held and 70 percent score or higher on ODOE duct testing exam, or
- Other duct sealing training performed by ODOE-recognized duct testing trainer and 70 percent score or higher on ODOE duct testing exam

Air Source Heat Pump/Air Conditioning Performance Testing (One of the following:)

- Proctor Engineering CheckMe® certification and CheckMe® license and 70 percent score or higher on performance testing exam, or
- Performance Testing Comfort System (PTCS) certification and 70 percent score or higher on performance testing exam.

Maintaining Tax Credit Certification in 2008

Tax credit certified technicians must **each calendar year** do (#1, #2 and #3):

- 1) Sign and update certification application form for 2008.
 - 2) Participate in an annual “update” conference telephone call or “update” workshop with ODOE for the appropriate technology technician desires certification. (ODOE recommends the staff of company’s employing certified technicians also attend this annual update conference telephone call to ensure understanding of the process.)
 - 3) Complete the following technology-specific requirements:
 - For solar technologies - Complete at least two (2) hours of Oregon Solar Energy Industries Association (OSEIA)-approved solar-related training **and** have submitted and verified a minimum of two (2) qualifying tax credit applications. If the applicant is certified after May31st only one submitted and verified tax credit application will be required for the remainder of that year. If the applicant is certified after August 31st then no tax credit applications will be required for the remainder of that year. A list of training opportunities is available from the OSEIA Web site at www.oregonseia.org
- OR
- For solar technologies - Complete at least two (2) hours of Oregon Solar Energy Industries Association (OSEIA)-approved solar-related training and score 70 percent or higher on the ODOE TCCT exam for the appropriate solar technology. A list of training opportunities is available from the OSEIA Web site at www.oregonseia.org
 - For geothermal - Maintain current requisite technical certification and licensing; complete **and** have submitted and approved a minimum of one (1) approved tax credit applications **or** show proof of having completed at least two hours of relevant installer training, community college HVAC course or other training approved by the ODOE Director.
 - For air source heat pumps/air conditioning performance testing – Must have submitted a minimum of four (4) approved tax credit applications.
 - For performance tested duct systems – Must have submitted a minimum of four (4) approved tax credit applications.

Failure to complete requirements for maintaining tax credit certified status will result in technician de-certification and/or company deletion from the ODOE tax credit certified technician company listing.

Contacts

Oregon Department of Energy - (503) 378-4040 or 1-800-221-8035 - www.oregon.gov/energy

Oregon Solar Energy Industries Association (OSEIA) - (503) 236-0367 - www.oregonseia.org

Proctor Engineering CheckMe® - Randy Larson 1-888-455-5742 x118

Performance Tested Comfort System (PTCS) - Andres Morrison, Ecos Consulting, PTCS Program Manager, (503) 525-2700 x142 www.ptcsnw.com

Bonneville Power Administration’s Web site at www.bpa.gov/Energy/N/projects/ptcs/

Enforcement Process

The Oregon Department of Energy (ODOE) certifies the technician but holds the company that employs this person responsible for meeting system performance and quality requirements. ODOE reserves the right to inspect installation of any equipment or system that has applied for a Residential Energy Tax Credit. A list of specific conditions for revoking certification is listed in the OARs under 330-070-0045 (2).

Guidelines to Residential Energy Tax Credit Certification Requirements

If the Oregon Department of Energy receives a complaint or a problem in installation is revealed during an inspection, ODOE will begin an investigation. The tax credit certified technician and the company that employs the technician will be notified and given an opportunity to respond. If the complaint relates to issues that the Construction Contractors Board (CCB) has authority to resolve, the complaint will be referred to the CCB. If the Department of Energy determines that a violation occurred, the company will be given 30 days to remedy the violation. Additional time may be granted when appropriate.

If the company proves to the satisfaction of the Oregon Department of Energy that the problem causing the revocation has been corrected and they currently employ at least one tax credit certified technician, the company can remain on the Oregon Department of Energy-approved list.

If the tax credit certified technician and employing company does not take appropriate action within the specified time, ODOE must begin enforcement proceedings to revoke the technician's tax credit certification, remove the company name from the ODOE company listing and/or impose a civil penalty. The certified technician and/or employing company may be given 21 days in which to request a hearing pursuant to ORS 183.310-183.550 and the Attorney General's Uniform and Model Rules of Procedure, January 15, 2004 edition.

To reapply after the revocation of technician's certification, the technician and employing company must prove to the satisfaction of ODOE that the problem causing revocation has been corrected. Revocation must be in effect for at least one year before the technician or employing company or any other firm with any of the same shareholders may reapply for certification. The technician must attend the Oregon Department of Energy tax credit certification update training and successfully repeat approved tax credit certification technical training requirements for the appropriate technology.

Changes in 2009 and 2010 for Solar Technicians

On and after January 1, 2009 the ODOE TCCT exams will be discontinued. **New applicants** for tax credit certified technician status must show one of the following certification / licensure requirements in addition to signing an agreement and meeting training requirements:

Photovoltaic Technicians

1. NABCEP Entry Level Certification
2. NABCEP Photovoltaic Installer Certification
3. Limited Renewable Energy Technician (LRT) License
4. Other tested certification approved by the Director.

Solar Thermal Technicians

1. NABCEP Solar Thermal Installer Certification
2. Solar Thermal License (STL)
3. Other tested certification approved by the Director.

On and after January 1, 2010 **all** tax credit certified technicians must show one of the certification / licensure requirements (above) required of the new applicants in 2009. This is in addition to signing a new agreement and meeting training requirements.