

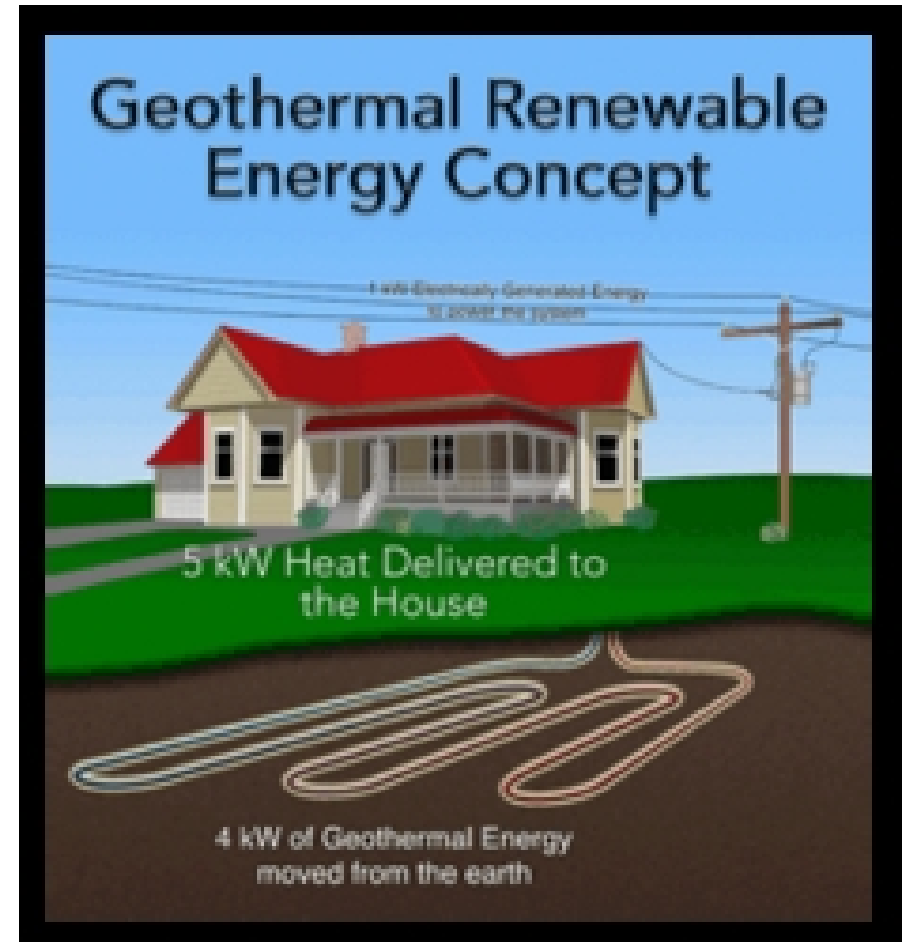
Tax Credit Certified Technician GSHP Program Criteria for 2011

Oregon Department of Energy

Disclaimer

This presentation **is**
a PROGRAM
TRAINING

It will **not** in any way
make you a
TECHNICAL
EXPERT



Training Outline

- Program overview
- TCCT requirements & responsibilities
- Submitting tax credit applications
- Equipment/installation specs
- Purpose of tax credit certification
- Submitting tax credit applications
- Maintaining tax credit certified status
- Other resources

RETC Program Overview

- Program was established in 1977
- Tax credits are based on measure “performance,” not cost
- Limited to
 - New devices
 - Installed in Oregon
 - One-time credit against taxes paid

RETC Overview

- Check Oregon Department of Energy website for eligible products
- <http://oregon.gov/ENERGY/CONS/RES>
- Tax credit is based on estimated annual energy savings

RETC Issues Overview

- Credit must be claimed within 3 years
- If installer has a signed contract for system by Dec. 31, and it is installed by March 31, the tax credit may be claimed in the preceding year.
- More than one system type can be claimed in a single year

ODOE Website Overview

The screenshot shows a web browser window with the address bar displaying <http://www.oregon.gov/ENERGY/index.shtml>. The browser's address bar includes navigation buttons (back, forward, refresh, home) and a search icon. Below the address bar is a toolbar with icons for 'Most Visited', 'Getting Started', 'Latest Headlines', 'Customize Links', 'Free Hotmail', 'Windows Marketplace', 'Windows Media', and 'Windows'. The page header features the Oregon state seal and the text 'OREGON.gov'. To the right of the header, there are options for 'TEXT SIZE: A+ A- A' and 'TEXT ONLY', along with a 'Select Language' button. The main content area is titled 'Oregon Department of Energy' and contains a welcome message: 'Welcome to the Oregon Department of Energy's (ODOE) improved website!'. Below this message is a photograph of a road in a field. To the right of the photo, a text block states: 'ODOE has revamped its website, making it customer-friendlier. The site features a redesigned home page sections for Residents, Businesses, Legislators and Public School officials. New features also include an Frequently Asked Questions (FAQ) and an Events Calendar. Please enjoy "your" improved website. If you questions or need assistance locating information, please give us a call at 503-378-4040.' Below the text is a red box with the word 'Applications' in white, and a red arrow pointing from it to the 'Credits and Loans' section. The page is divided into two main columns: 'Current and Emerging Issues' and 'Resources'. The 'Current and Emerging Issues' column includes sections for 'Renewable Energy' (with links to 'Renewable energy home page', 'Renewable Portfolio Standard (RPS)', and 'Renewable energy facilities GIS map'), 'Energy Facility Siting' (with links to 'Energy facility siting home page' and 'Process for siting large energy facilities and pipelines'), and an image of a globe with green arrows. The 'Resources' column includes sections for 'Credits and Loans' (with links to 'Residential Energy Tax Credits', 'Business Energy Tax Credits', 'Biomass producer/collector tax credits', and 'Energy Loan Program') and 'Energy Saving Ideas' (with links to 'Low-cost ways to cut energy bills' and 'Where you can save in your home'). A sidebar on the left contains navigation links: 'Department', 'Search', 'About Us', 'Contact Us', 'A-Z Index', 'FAQs', 'For Residents', 'For Businesses', 'For Schools', 'For Legislators', and 'News Releases'.

Department

Search

About Us

Contact Us

A-Z Index

FAQs

For Residents


For Businesses

For Schools

For Legislators

News Releases

Welcome to the Oregon Department of Energy's (ODOE) improved website!



ODOE has revamped its website, making it customer-friendlier. The site features a redesigned home page sections for Residents, Businesses, Legislators and Public School officials. New features also include an Frequently Asked Questions (FAQ) and an Events Calendar. Please enjoy "your" improved website. If you questions or need assistance locating information, please give us a call at 503-378-4040.

Tell us what you think!

Applications

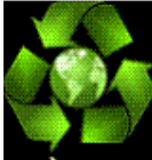
Current and Emerging Issues

Renewable Energy

[Renewable energy home page](#)

[Renewable Portfolio Standard \(RPS\)](#)


[Renewable energy facilities GIS map](#)



Energy Facility Siting

[Energy facility siting home page](#)

[Process for siting large energy facilities and pipelines](#)



Resources

Credits and Loans

[Residential Energy Tax Credits](#)

[Business Energy Tax Credits](#)

[Biomass producer/collector tax credits](#)

[Energy Loan Program](#)

Energy Saving Ideas

[Low-cost ways to cut energy bills](#)

[Where you can save in your home](#)

GSHP TCCT web page

Information for Ground Source Heat Pump Technicians

Premium efficiency ground source heat pumps that meet tax credit performance standards are eligible for a Residential Energy Tax Credit only if installed or verified by a tax credit certified geothermal technician.

The equipment specifications are:

- Closed loop systems
- Performance rating of 3.3 COP for closed loop or 3.5 COP for direct exchange (DX) systems

Incentive amounts for ground source heat pumps are shown on the main geothermal page. The Oregon Department of Energy (ODOE) does not maintain a qualified products list for ground source heat pumps.

Water well reinjection systems or other open loop "pump and dump" systems are not eligible for the Residential Energy Tax Credit. Direct use of geothermal heat using "downhole heat exchangers" are eligible for a Residential Energy Tax Credit, but have special requirements. Please contact the appropriate staff person listed at the bottom of this page for more information.

[2011 Tax Credit-Certified Technician Application \(PDF\)](#)

[2011 Tax Credit Certified Technician Renewal \(PDF\)](#)

[Current list of companies employing tax credit certified technicians <PDF>](#)

[RETC Geothermal Page](#)

[International Ground Source Heat Pump Association \(IGSHPA\)](#)

 [Back to the top](#)

Becoming a Tax Credit-Certified Technician for GSHP

To become a TCCT you must show proof of successful completion of the [International Ground Source Heat Pump Association \(IGSHPA\)](#) training, the IGSHPA certified manufacturer's installer training program, or other training approved by ODOE. You do not have to be a current member of IGSHPA. In addition to this training requirement, see the [full certification instructions](#).

 [Back to the top](#)

GSHP Incentive Amounts

System Size	BTU per Hour Output	Estimated Savings	Tax Credit
3 ton and under	Less than 40,000	1,000 kWh	\$600
4 ton	40,000 - 49,999	1,165 kWh	\$700
5 ton	50,000 - 64,999	1,335 kWh	\$800
6 ton and over	65,000 and over	1,500 kWh	\$900

Rulemaking Web Page Overview



Oregon Department of Energy Get Involved with ODOE - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://www.oregon.gov/ENERGY/get_involved_with_ODOE.shtml

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Oregon Department of Energy

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Get Involved with ODOE

- [Introduction](#)
- [Business Energy Tax Credit Rulemaking](#)
- [Carbon Dioxide Equivalent Offsets Advisory Committee](#)
- [Energy Advisory Committee](#)
- [Energy Efficiency and Sustainable Technology Rule. Advisory Comm.](#)
- [Energy Facility Siting](#)
- [Energy Performance Scores Task Force](#)
- [Renewable Portfolio Standard \(RPS\) Rulemaking Advisory Committee](#)
- [Residential Energy Tax Credit Rulemaking](#)
- [State Energy Loan Program Rulemaking Advisory Committee](#)

Introduction

The Oregon Department of Energy (ODOE) believes that informing and involving citizens leads to good public policy.

Purpose of TCCT

- Provide verification of ***residential*** tax credit applications that system meets ODOE requirements
- Provide honest, accurate savings estimates
- Must verify that system will perform according to program requirements

TCCT Getting Certified

1. Sign an agreement with the Oregon Department of Energy
2. Pass RETC quiz
3. complete the International Ground Source Heat Pump Association (IGSHPA) installer training and exam or complete and pass an installer training that is equivalent to IGSHPA.

TCCT Staying Certified – Every Three Years

1. Renew agreement with the Oregon Department of Energy
2. Attend conference calls (if scheduled)
3. Verify one system or take two hours of technical continuing education

NOTE: Failure to meet program requirements will result in one year suspension from program.

TCCT Responsibilities

1. Providing systems of the highest quality and workmanship
2. Work with both the Department of Energy staff and Oregon consumers with the highest professional conduct and good faith

TCCT Responsibilities

3. Assure that all installations are done in accordance with **all** local building codes and have been properly permitted, when necessary.
4. Provide the owner with ODOE-approved consumer information materials

TCCT Responsibilities

5. Provide owner with system manual
 - System documentation (design, plan view)
 - Operation and maintenance instructions
 - 2-year full warranty (parts and labor)
 - Component datasheets

6. Educate the owner about proper operation and maintenance of the system

TCCT Responsibilities

7. Provide a full written warranty for the system that extends not less than **24 months** from when it passed final inspection



TCCT Responsibilities

8. Assisting the owner with the tax credit application
 - Technical information (Sections 2, 3, & 4)
 - Signing the application verifying installation
 - Presenting the tax credit application to the owner
9. Explaining to the owner how the tax credit pass-through process works
10. Make no false claims regarding ODOE tax credit certification

Documentation Requirements

- System Manual
 - ARI ratings
 - Design limits
 - Components
- Warrantee and contact information
- Equipment data sheets
- Permit number

Key Program Materials

- Oregon Administrative Rules
 - http://www.oregon.gov/ENERGY/CONS/RES/tax/docs/Rulemaking/RETC_Rules_122210.pdf
- Residential Tax Credit Applications
- **Both are available on ODOE website**

GSHP Equipment Specifications

- Closed loop only
- No “pump and dump”
- ARI Rated COP at 50 degrees
 - 3.3 COP for closed loop
 - 3.5 COP for DX systems
 - Both same as Energy Star (no EER specs.)
- Size to meet heat load

Residential Energy Tax Credit

- ODOE may, by rule, provide a lesser amount based on market conditions (HB 3672)
- May not exceed 50% of cost

Residential Energy Tax Credit

- \$1,500 maximum credit for multi-unit systems
- \$150 bonus if ducts are sealed at same time of GSHP installation
- Must be claimed within 5 years
- **MUST BE VERIFIED BY TCCT**

RETC GSHP Application

- Download from ODOE website regularly – and clear your browser cache
- Fill it out for your customer and save an electronic copy
 - Need to attach Itemized receipt listing out the main components to the system on company letterhead

Application and Verification Form
for Residential Energy Tax Credit Certification

Geothermal Heat Pump Systems

Oregon Department of Energy

625 Marion St. NE
Salem, OR 97301-3737
Toll-free: 1-800-221-8035
Salem: (503) 378-4040 Fax (503) 373-7806
Web site: www.oregon.gov/energy

Don't forget...
...to sign your application
and include your receipt

1. CUSTOMER INFORMATION *Required to process

Name:		Social Security No.*:	
Mailing address:		Daytime phone:	
City:	Oregon County:	State:	Zip:
Street address (if different)			
City:	Oregon County:	State:	Zip:
If different than mailing address, please explain:			
This equipment is installed in your: <input type="checkbox"/> Primary residence <input type="checkbox"/> Vacation home; or <input type="checkbox"/> I am a renter			

Documentation Requirements

- System manual
 - System overview page
 - Schematic
 - Components
- Warrantee and contact Information
- Equipment data sheets

GSHP System Types

- Downhole heat exchangers (direct use geothermal systems) must include a summary report from Oregon Institute of Technology or other source approved by the Director which describes the system and indicates that it will deliver sufficient heat and the design meets current good practice guidelines. They will be reviewed on a case-by case basis.



Air-Conditioning, Heating,
and Refrigeration Institute



Directory of Certified Product Performance

The AHRI Certification Programs are the trusted sources of performance for heating, ventilation, air-conditioning, and commercial refrigeration equipment.

RESIDENTIAL

- > Air Conditioners and Air Conditioner Coils
- > Baseboard Radiation
- > Boilers
- > Direct Geo Exchange Heat Pumps
- > Direct Heaters

COMMERCIAL

- > Air Cooled Chilling Packages
- > Air-to-Air Energy Recovery Ventilators
- > Automatic Commercial Ice-Cube Machines and Ice Storage Bins
- > Boilers
- > Central Station Air-Handling Units
- > Combo Systems
- > Comm. Refrigerated Display Merchandisers And Storage Cabinets

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Resources

- Find ENERGY STAR Qualified Air Conditioning and Heat Pump Systems
- Find Standards
- Learn more about Certification Programs
- Find NATE-certified HVACR contractors
- Help with this site

Closing Comments

Key #1

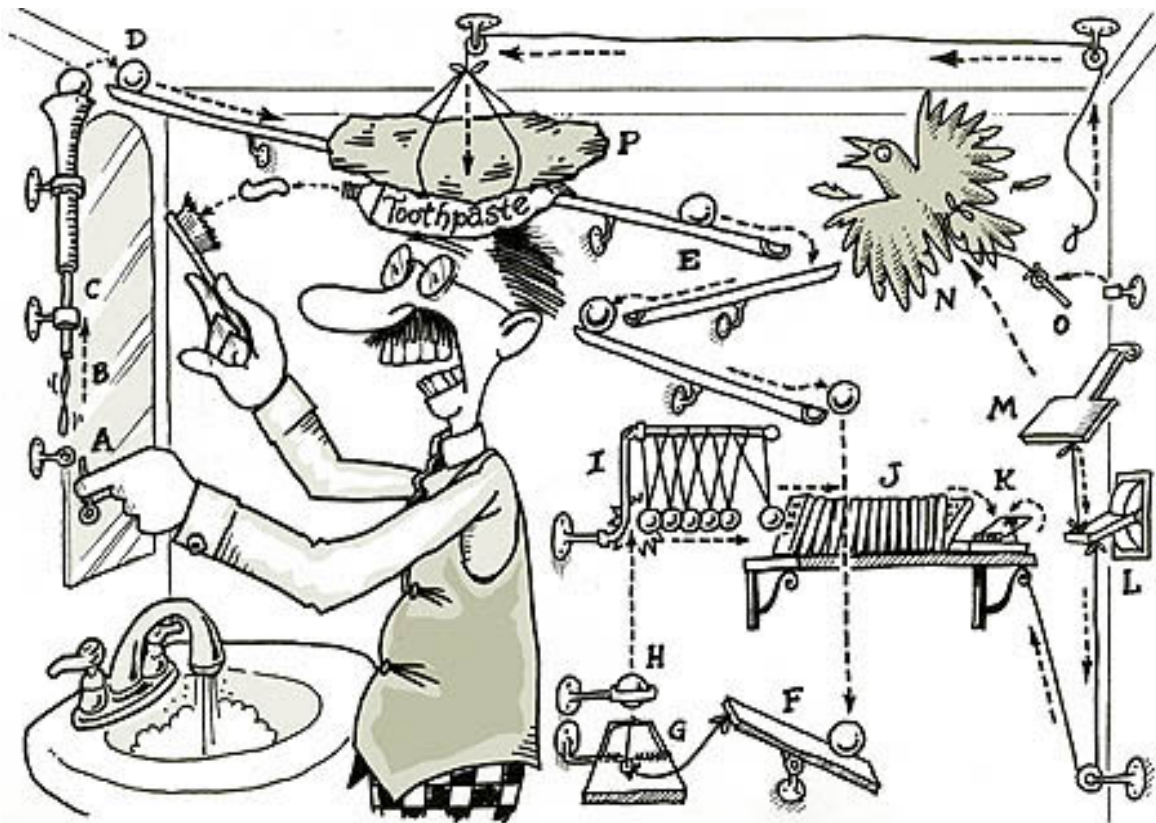
Focus on big impact items

- GSHP
 - Match the load
 - Design heat loss of the home
 - Insure systems deliver rated energy savings



Key #3

Provide an EASY way to tell a system is working well



Key #4

Under-estimate but
over-deliver performance



Website & Contacts

- www.oregon.gov/energy
- Tax credit administrative specialist
 - Angie Whitethorn (RETC)
 - 503-378-2697

Thank You!

