

2011 Instructions: Ground Source Heat Pump Tax Credit Certified Technician



OREGON
DEPARTMENT OF
ENERGY

The Oregon Department of Energy (ODOE) appreciates your interest in the **Tax Credit Certified Technician (TCCT) Program**. Please read through the information below.

To become a TCCT you must first complete the International Ground Source Heat Pump Association (IGSHPA) installer training and pass the examination or complete and pass an installer training that is equivalent to IGSHPA (check with ODOE to see what equivalent training qualifies). Many equipment manufacturers provide training that includes the IGSHPA test. You do not have to be a current member of IGSHPA.

In addition to this requirement, a technician must:

1. Contact ODOE to request a Ground Source Heat Pump (GSHP) packet (see info below). The packet includes the GSHP open book test. The test must be received by ODOE within 14 days from the date on the letter included in the packet. You must receive a test grade of 80% or better to pass.
2. Read the Oregon Administrative Rules (OARs) 330-070-0014 through 330-070-0048 and 330-070-0070 at http://oregon.gov/ENERGY/CONS/RES/tax/docs/Rulemaking/RETC_Rules_122210.pdf
3. You must be employed with a company or have an independent Oregon CCB License.
4. When you return your test, also submit a completed TCCT Application with your GSHP installer certification.

The tax-credit certified technician's status is based on the following:

1. Knowledge and understanding of the Residential Energy Tax Credit (RETC) program requirements and expectations
2. Ability to provide systems that are designed and installed with a focus on performance and longevity
3. Ability to deal with both ODOE and consumers in a professional manner
4. Employment by a company with a Construction Contractors Board (CCB) license or have your own independent business

You must meet the criteria to be deemed certified.

Renewing Your Tax Credit Certified Technician Status

Technicians must maintain tax-credit certification status by completing the following:

- Technology-specific requirements during the following three years: Complete a minimum of 1 tax credit approved installation or two hours of GSHP continuing education.

If you did not complete a minimum of 1 qualifying installation, you may submit proof of having attended a two-hour geothermal HVAC-related training.

Tax credit certified technicians who do not meet the minimum requirements may reapply after one year.

Information for Ground Source Heat Pump Installers

Premium efficiency ground source heat pumps that meet tax credit performance standards are eligible for a RETC if installed or verified by a Geothermal Tax Credit Certified Technician on ODOE's list.

The following requirements apply:

1. Closed loop systems qualify
2. Eligible systems must have a performance rating of 3.3 COP for closed loop or 3.5 COP for direct exchange (DX) systems
3. Technician must issue the customer a minimum 24-month warranty (parts & labor) in addition to all manufacturer warranties
4. Technician is required to have the geothermal system inspected and permitted by the customer's local jurisdiction

Water well reinjection systems or other open loop "pump and dump" systems are not eligible for RETC.

Direct use of geothermal heat using "down-hole heat exchangers" is eligible for a RETC, but has the following special requirements:

- Must include a summary report from Oregon Institute of Technology or other source approved by the ODOE Director, which describes the system, indicating it will deliver sufficient heat and that its design meets current good practice guidelines. The system descriptions will be reviewed on a case-by-case basis.

Submitting Tax Credit Applications for Ground Source Heat Pump Systems

Only TCCTs can qualify systems for the Residential Energy Tax Credit.

Download the application form at:

http://oregon.gov/ENERGY/CONS/RES/tax/docs/Rulemaking/RETC_Rules_122210.pdf and fill out section 2, 3, and 4 and sign it. Be sure to provide the customer with a copy of the manufacturer's AHRI Certification data page showing the rated COP for the equipment you've installed. Also send a copy with the Geothermal Application. The invoice must include the following:

- Model number
- Serial number
- Tonnage
- Unit cost
- Total System Cost
- BTUs per hour
- ARI rated COP (required to come in with application)
- Paid in full receipt needs to list out the main components to the system to reflect what is in the application (*example on pg. 3*).

For application forms, go to our website at:

<http://oregon.gov/ENERGY/CONS/RES/tax/docs/Geo.pdf>

For more information contact:

Angie Whitethorn 503-378-2697 or toll-free in Oregon at 1-800-221-8035, Ext. 252

E-mail: Angela.Whitethorn@state.or.us

Example Receipt for Residential Energy Tax Credits

Installation Date: October 14, 2009

PAID in full

Customer Name:

Site Address:

Mailing Address: Same as above

1/Geo-Thermal. Installation

Manufacturer: Water Furnace

Model #: NDV072A141NBR

Serial #: 090701329

Tons: 6

BTU's per hour: 74,400 ARI

Rated COP: 3.8 EER: 16.5

Equipment Cost: \$14,290.40

Total System Cost: \$27,035

Materials & Spacing Details: Closed Loop, 4800', Trench 375'. Geopipe Info, 1 1/4" Reverse return headers, Y4" loop with PE3408 socket fusion polyethylene geopipe.

State Tax Credit Amount: \$900.00

Federal Incentive: \$

Utility Incentive: \$

All of the above specified items were inspected an invoices were paid.

Company Representative Signature: _____

Date: _____