



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.