

Oregon Rental Home Heat Pump Program

Program Checklist

To apply for a rebate or grant from the Oregon Rental Home Heat Pump Program, there are information and documents the Oregon Department of Energy will need along with the application. Contractors may need to gather this information or documentation from the customer (owner of the rental dwelling or manufactured home or recreational vehicle in a rented space), who may need to gather information from their tenant. Below is a checklist of the documents and information ODOE will ask for in order to receive funds.

Owner Checklist

- ☐ Rental or lease agreement
- ☐ If applicable, evidence of Tribal membership
- ☐ If applicable, a low- or moderate-income eligibility attestation form
- ☐ To qualify the dwelling as low or moderate income:

100% Oregon State Median Income Guideline

Household Unit size	Annual Gross Income*	Monthly Gross Income*
1	\$61,351.67	\$5,112.63
2	\$80,230.00	\$6,685.83
3	\$99,106.67	\$8,258.88
4	\$117,983.33	\$9,831.95
5	\$136,861.67	\$11,405.13
6	\$155,738.33	\$12,978.20
7	\$159,278.33	\$13,273.20
8	\$162,816.67	\$13,568.05
9	\$166,356.67	\$13,863.05
10	\$169,896.67	\$14,158.05
11	\$173,436.67	\$14,453.05
12	\$176,975.00	\$14,747.92
Each Additional Member Add	\$3,538.33	\$294.87

* Gross Income means all household income before any deductions or taxes

If applying for a low- or moderate-income rebate, proof is required. **Redact all confidential personal information such as SSNs.** There are three options for determining eligibility:

- Option 1: Proof of participation in programs administered by Oregon Housing and Community Services, federally recognized Indian tribe, or Tribally Designated Housing Entity** (listed on the form).
- Option 2: Proof that a member of the household has participated in an assistance program** (listed on the form) in the last seven months.

3. **Option 3: Provide a tax transcript** for each tax filer residing at the dwelling where the heat pump will be installed that shows that the household adjusted income is less than or equal to 100% of state median income adjusted to the applicable household size (shown in table above).

Contractor Checklist:

Information needed for contractor registration:

- ☐ CCB number
- ☐ Form W-9, request for Taxpayer Identification Number and Certificate (saved file or image upload)

Contractor requirements to participate in the program:

- ☐ Workers compensation insurance coverage (if applicable)
- ☐ You or your company has not been issued a non-complying employer order by Oregon Workers Compensation Division the last two years
- ☐ No final order determinations from the Bureau of Labor and Industries Labor Commissioner in the past two years
- ☐ Must be eligible to receive public works contracts by the Bureau of Labor and Industries

Information needed to apply for a rebate reservation:

- ☐ **Signed** installation agreement that details:
 - ☐ The address where the installation will occur
 - ☐ Customer name
 - ☐ Total project cost
 - ☐ Heat pump equipment details (including model numbers for all units)
 - ☐ Warranty information
 - ☐ Incentive details (this includes ODOE incentives and other anticipated incentives)
- ☐ Information under the “Owner Checklist” above (including any income information if applying for a low- or moderate-income incentive)

Information needed to submit the project completion notice and request payment:

- ☐ Permits
- ☐ Signed statement that the full value of the incentive has been passed on to the customer
- ☐ Evidence of an approved final inspection by the authority having jurisdiction
- ☐ Invoice that shows:
 - ☐ Site owner’s name
 - ☐ Site address
 - ☐ Contractor’s name
 - ☐ Description of the work conducted, including indoor and outdoor heat pump model numbers
 - ☐ Total cost to customer of work (broken up by each component of the work)
 - ☐ ODOE incentive and other incentives the project is receiving
 - ☐ Date the work was conducted