



Premium Efficiency Furnaces and Hydronic Air Handlers

Oregon Department of Energy

The Oregon Residential Energy Tax Credit Program provides a tax credit for Premium Efficiency Furnaces and Hydronic Air Handlers certified by the Oregon Department of Energy. This equipment provides substantial savings in both natural gas and electricity over other models.

A list of eligible furnaces and air handlers by manufacturer and model number is available from the Oregon Department of Energy. Visit our web site or call us at the number below. The list of eligible models is updated as new models come on the market. Note: "hybrid" or dual-fuel heat pumps with a tax credit eligible gas furnace as backup are only eligible for a single tax credit on the primary heating equipment, usually the heat pump. Only air handlers used with a boiler or tankless water heater (hydronic system) are eligible.

You are eligible for an additional \$150 tax credit by having your ductwork tested and sealed by a tax credit certified technician at the same time you have a new furnace or hydronic air handler installed. Send in the separate duct sealing tax credit application at the same time you send in this application.

This tax credit is available to Oregon residents and is in addition to other utility or efficiency program rebates or incentives. The system(s) must be new and located in an Oregon dwelling that is your primary or secondary (vacation) residence. For details on who is eligible for the tax credit, see the next page.

Don't wait to apply for the tax credit as processing may take several weeks. You will receive a Certification card that you will need when you file your Oregon Tax Return.

Take the following steps to receive your tax credit:

1. **Verify that the furnace or hydronic air handler you are buying is eligible for a tax credit.** Look up the equipment by manufacturer and model number in the Oregon Department of Energy list of qualifying furnaces and hydronic air handlers. If it isn't listed, the unit may not be eligible for a tax credit. Contact the company that installed the system for clarification.
2. **Attach a copy of your final itemized receipt** showing the full model number of the equipment, the AHRI number of the equipment, your cost for the equipment, as well as total job cost. The serial number is not required. If this model number or equipment cost is not listed on the receipt, contact your heating company for an updated copy with this information. It is recommended to include a copy of the AHRI Certificate with your application which can be found at the following website: www.AHRIDirectory.org
3. **Submit a completed *Application and Verification Form for Tax Credit Certification-Premium Efficiency Furnace & Hydronic Air Handlers*.** Mail your application to the Department of Energy to the address listed on the back of the application. The tax credit amount is the lesser of 25% of the net equipment cost (not total job cost) or \$350 for furnaces and up to \$350 for hydronic air handlers. We will review the application and send you a certification postcard indicating the qualifying tax credit amount.
4. **Claim the tax credit on your state income tax form.** Keep your certification postcard, a copy of your application, and proof of payment with your tax records. **Do not attach the certification postcard to your tax return.** Upon audit or examination, the information shall be made available to the Oregon Department of Revenue to verify any credit claimed. Tax credits not taken in the first tax year may be carried forward for up to five years.

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Eligibility for the Oregon Residential Energy Tax Credit:

To qualify for the Oregon Residential Energy Tax Credit, you must be an Oregon resident and the equipment must be located in an Oregon dwelling that is your primary or secondary (vacation) residence.

The tax credit issued normally applies to the tax year the equipment was purchased or placed in service, as long as it is placed in service by April 1st of the following year and the Oregon Department of Energy has received your completed application by that date.

The Oregon Department of Energy certifies the energy efficiency of systems and equipment for the Oregon Residential Energy Tax Credit program. It is the applicant's responsibility to ensure compliance with all other eligibility requirements. If you have questions concerning claiming the credit on your Oregon tax return, contact the Oregon Department of Revenue at 1-800-356-4222 or (503) 378-4988.

Note: Your Social Security Number is required to process your tax credit application. It is used to establish your identity for tax purposes only and is authorized by Section 405, Title 42 of the United States Codes. We cannot process your application without it.

Pass-through Option:

If you are a full-time Oregon resident and do not have an Oregon income tax liability, you may choose to transfer your tax credit to another full-time Oregon resident or Oregon business that does have a tax liability. The Pass-through Option will allow you to transfer your tax credit to an individual or business with an Oregon tax liability who will make a lump-sum payment to you based on a percentage of the certified tax credit amount. To use this option, complete this application form first. Your application will be reviewed for eligibility and a Pass-through Option Application will be sent to you in return. You and your pass-through partner (the tax credit recipient) will complete and sign the *Pass-through Option Application* and mail it to the Oregon Department of Energy. You are responsible for finding your own pass-through partner. The Oregon Department of Energy will then issue the tax credit certification to the pass-through partner. **The pass-through option is a one-time transfer and is final. There may be tax implications. We advise you to consult with your tax preparer or call the Department of Revenue.**

If you have questions concerning claiming the tax credit on your Oregon tax return, contact the Oregon Department of Revenue at 1-800-356-4222 or (503) 378-4988.

If you have any questions about equipment eligibility and application process, please see the Oregon Department of Energy Web site: (www.oregon.gov/energy/) or call us toll-free: 1 (800) 221-8035. In Salem, please call (503) 378-4040.





Application and Verification Form for Residential Energy Tax Credit for
**Premium Efficiency Furnaces and
 Hydronic Air Handlers**
 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



**All incomplete applications will
 be returned to applicant and will
 not be processed**

1. Customer Information *Required to process**

Name:		Social Security No. ^A :	
Mailing address:		Daytime phone:	
City:	Oregon County:	State:	Zip:
Street address where appliance(s) is located (if different)			
City:	Oregon County:	State:	Zip:
If different than mailing address, please explain:			
Check if this is your: <input type="checkbox"/> Primary residence <input type="checkbox"/> Secondary (vacation) residence <input type="checkbox"/> I am the renter <i>(Landlords and builders do not use this form)</i>			

2. Utility and House Information

Electric utility company:	Natural gas utility company (if any):
Fuel used by this furnace or air handler:	<input type="checkbox"/> Natural gas <input type="checkbox"/> Propane <input type="checkbox"/> Electric <input type="checkbox"/> Oil
Where is this furnace /air handler located?	<input type="checkbox"/> Basement <input type="checkbox"/> Garage <input type="checkbox"/> Attic
Is this installation: <input type="checkbox"/> Replacement <input type="checkbox"/> New construction	
Does this installation use outside combustion air?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you have your ducts tested and sealed at the same time as this installation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you have a high efficiency heat pump installed at the same time?	<input type="checkbox"/> Yes <input type="checkbox"/> No

3. Equipment Information
 (To be eligible for a credit, the installing Technician must provide ALL of the information in this section.)

Provide the following information for the furnace or air handler for which you are claiming a tax credit, and **attach itemized receipts for your purchase.**

Manufacturer	Model Number	Configuration (up, down or horizontal)	*AHRI # ^B	Equipment Only Cost ^C	Tax Credit Amount ^D	Date of Installation
<i>EXAMPLE</i>	<i>GCVM960604CX</i>	<i>Down</i>	<i>4661529</i>	<i>\$1,220</i>	<i>\$305</i>	<i>1-2-2012</i>

HVAC Company Name:	Phone:
Total job cost (including labor): \$	

^A The request for your Social Security Number is authorized by Section 405, Title 42, of the United States Code. It is used to establish your identity for tax purposes only. We cannot process your application without this information.
^B At the time of installation. From your installer or www.AHRIDirectory.org (required).
^C Net purchase price for equipment-only (no labor).
^D From the Oregon Department of Energy qualifying equipment list or 25 percent of the customer net equipment cost, whichever is less.

FOR OFFICE USE ONLY
File No.:
Date Received:
Tax Credit Amount:
Tax Year:

4. Pass-Through Option (Homeowner completes)

I want to keep the full tax credit myself

I want to transfer my tax credit to Oregon resident Oregon business

• If your tax credit is \$1,500 or less:

- Your pass-through partner will pay you 95% of the certified tax credit amount
- Your pass-through partner will receive 100% of the tax credit to be taken in one year

• If your tax credit is more than \$1,500:

- And your pass-through partner is a full-time Oregon resident, the partner will pay you 86% of the certified tax credit amount
- And your pass-through partner is an Oregon business, the partner will pay you 80% of the certified tax credit amount
- Your pass-through partner will receive 100% of the tax credit with a maximum amount of \$1,500 filed per year

To use this Pass-through Option, complete this application form first. Your application will be reviewed for eligibility. A Pass-through Option Application will be sent to you in return. **You are responsible for finding your own pass-through partner** (either a full-time Oregon resident or a business with Oregon state tax liability). You and your pass-through partner (the tax credit recipient) will complete and sign the Pass-through Option Application and mail it to the Oregon Department of Energy. **The pass-through option is a one-time transfer and is final.** The Department of Energy will then issue the tax credit certification to the pass-through partner. **Important: There may be tax implications for the pass through partner. We advise you to consult with your tax preparer.**

5. Declarations and Installation Verification

I understand that the Oregon Department of Energy does not make any warranty concerning the performance, operation, installation or any other characteristic or feature of the furnace. Energy Department approval is only for purposes of obtaining the Oregon Residential Energy Tax Credit. I certify that I am the original owner of the system(s). I certify that the system(s) are not installed in a recreational vehicle or motor home. By signing below, I (we) certify that the furnace described in this application is installed and that the information contained herein is accurate and true.

The Oregon Department of Energy does not sell information from this application as a mailing list. However, we may be required to disclose the name, address and phone number from your application under the Oregon Public Records law ORS 192.410 et seq. We can withhold the address and phone number following a written request explaining personal safety concerns, such as a temporary restraining order. The Oregon Department of Energy does not endorse any company that requests the information.

6. Application Signatures

You must sign below.

Signature of Applicant: _____ Date _____

Signature of Joint Applicant: _____ Date _____

Co Applicant:

Only if two or more persons are purchasing this system **and** filing separate tax returns, give information below.

Name: _____ Address: _____ % ownership: _____

Social Security Number: _____ Applicant Signature: _____ Date: _____

7. Mailing Instructions

Before mailing, be sure your application is complete. It should include:

- Application form with your Social Security Number and signature
- Copy of itemized final receipt with full model numbers, AHRI number and your equipment-only cost.

Photocopy all documents for your records and mail to the address below.

Note: The Oregon Department of Energy certifies the energy efficiency of systems and equipment for the Oregon Residential Energy Tax Credit program. It is the applicant's responsibility to ensure compliance with all other eligibility requirements. If you have questions concerning claiming the credit on your Oregon tax return, contact the Oregon Department of Revenue at 1-800-356-4222 or (503) 378-4988.

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