



# Oregon Rental Home Heat Pump Program

## Low- and Moderate-Income Residential Household Eligibility – Option 3

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In order to qualify for a rebate offered under the program for low- or moderate-income tenants, the owner of the dwelling where the installation will be located must provide proof of eligibility. Proof of eligibility must be provided in one of three ways.

**Option 3: The owner provides the Department with a U.S. Internal Revenue Service or Oregon Department of Revenue tax transcript for each tax filer residing at the dwelling where the heat pump shall be installed. A tax return is *not* a tax transcript. A tax transcript must be for the most recent tax filing year immediately preceding the current year, or the transcript for the year prior if the tax return for the most recent tax filing year has not yet been filed. A transcript must also demonstrate the household adjusted gross income is less than or equal to 100 percent of state median income adjusted for the applicable household size. If the tax transcript contains social security numbers on the document, the resident should redact these before providing it to the rental unit owner or contractor.**

To order a tax transcript please call the Department of Revenue at 503-378-4988, visit any Oregon Department of Revenue location in person, or visit <https://www.irs.gov/individuals/get-transcript>.

Upon receipt of the requested tax transcript(s), finish completing this form.

### Owner Attestation of Household Size

By signing below, the owner attests to a **Household Size of \_\_\_ persons**. “Household” means all individuals who reside in the place of residence, including all family members and roommates who are not related and not part of a separate lease agreement. Further, the owner attests that this declaration of household size is true and correct.

### Owner Attestation of Authentic Documentation Provided

By signing, the owner attests that the Tax Transcript provided with this form to the Oregon Department of Energy is true, correct, and authentic. Furthermore, the owner acknowledges that if the document content has been altered, or the Household Size falsified, the Department may order the revocation of the rebate or grant and may pursue appropriate legal action against the owner as appropriate.

Owner Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name of Tenant: \_\_\_\_\_

Dwelling Physical Address: \_\_\_\_\_

(Same as project Site Address) \_\_\_\_\_

**Form Instructions:**

1. Fill out form completely and acquire signature (electronic signatures are acceptable).
2. Save the signed Eligibility attestation form as a PDF.
3. Scan the Tax Transcript to a PDF.
4. Upload the PDFs to ODOE in the Reservation Application.

To qualify as a household with low- or moderate-income, the sum of all incomes in the household must be at or below the amounts listed below, by household size. All income earners residing at the place of residence, including all family members and roommates who are not related and not part of a separate lease agreement.

<b>100% Oregon State Median Income Guideline</b>		
<b>Household Unit size</b>	<b>Annual Gross Income*</b>	<b>Monthly Gross Income*</b>
1	\$55,711.67	\$4,642.63
2	\$72,853.33	\$6,071.12
3	\$89,995.00	\$7,499.58
4	\$107,136.67	\$8,928.05
5	\$124,278.33	\$10,356.53
6	\$141,420.00	\$11,785.00
7	\$144,635.00	\$12,052.92
8	\$147,848.33	\$12,320.70
9	\$151,063.33	\$12,588.62
10	\$154,276.67	\$12,856.38
11	\$157,490.00	\$13,124.17
12	\$160,710.00	\$13,392.08
Each Additional Member	\$3,215.00	\$267.92
<b>* Gross Income means all household income before any deductions</b>		

This data is based on a conversion from 60% Oregon SMI as prepared by the Administration for Children and Families, Office of Community Services, Division of Energy Assistance for LIHEAP program eligibility, and the Energy Assistance Income Guidelines published by Oregon Housing and Community Services.

For more information, please see the following resources:

- <https://www.oregon.gov/ohcs/energy-weatherization/Pages/utility-bill-payment-assistance.aspx#e-eligibility>
- <https://www.oregon.gov/ohcs/Pages/energy-weatherization-oregon-income-guidelines.aspx>