

# Oregon Rental Home Heat Pump Program

## Program Guide for Contractors

The Oregon Rental Home Heat Pump Program supports the purchase and installation of heat pumps in rental homes to offer much-needed heat relief.

Rebates and grants will be issued to approved contractors who install eligible heat pumps and carry out upgrades to facilitate the installation of the heat pumps in rental homes. The full rebate and grant amount issued to the contractor is then passed on to the customer (rental home owner) as savings on the cost of the installation and upgrade.

To become an approved contractor, contractors must [first register with ODOE](#). Before installing a heat pump, approved contractors must first submit a [rebate reservation request](#). ODOE will reserve funds for eligible projects, then the contractor can install the heat pump and complete related upgrades prior to requesting payment. Each reservation is valid for 180 days, unless extended.

**Contractors can use this guide to help them through the reservation process.**



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## ACCESSING THE CUSTOMER DASHBOARD

Log in to ODOE's customer portal to access your approved contractor account.

For approved companies with more than one user entering information for potential rebates, each user will need to create an account – ODOE's system is not currently able to add multiple users to one company account. If you work for a company that has been approved and wish to submit reservations via your own log-in, please register to become a contractor using our [Contractor Registration Guide](#).

Once logged in, you will need to navigate to the Oregon Rental Home Heat Pump Program (ORHHPP) page to get to the reservation application. You can do so by using the link below or by selecting the *Oregon Rental Home Heat Pump Program* option from the *Financial/Incentive* dropdown menu.



Direct Link: [Oregon Rental Home Heat Pump Program · Customer Self-Service \(powerappsportals.us\)](https://powerappsportals.us)

## BEFORE YOU BEGIN

We recommend reading through this guide before starting and having it open as you follow along with your own reservation, as there are some helpful tips.

Be sure to have ready the documentation you will need to upload as part of this process. We have created a [Program Checklist](#) to help ensure you have all the documents you need before you begin. You will need:

- AHRI certificate or reference number for equipment being installed
- Rental Agreement
- Heating and cooling load calculations in BTU
- A signed installation agreement that details:
  - The address where the installation will occur (site address)
  - Customer name
  - Total project cost (separate from any upgrade costs)
  - Heat pump equipment details (including model numbers for all units)
  - Parts and Labor Warranty information
  - Incentive details (this includes ODOE incentives — both rebate and grants — and other anticipated incentives). The [Incentive Eligibility guide](#) goes over all incentives available. The higher incentives for a manufactured dwelling or RV are only eligible for **owner-occupied** dwellings located in a **rented space in a manufactured home or RV park**. Rebate percent caps are applied to the total system cost. The final ODOE rebate amount will be either the percent cap or the rebate listed in the guide, whichever is the lesser of the two. When combined with other incentives, the ODOE rebate cannot result in reimbursement of more than 100% of the project costs. The total project cost for the installation of the

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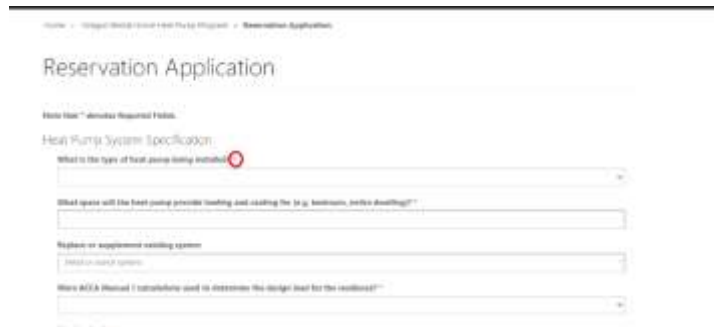
heat pump should only include those related to the rebate. Any upgrade grant costs (mechanical or electrical) should not be included as the two are separate.

- If applying for a low- or moderate-income incentive:
  - A completed LMI option form (be sure to fill out household size)
  - necessary back-up documentation/proof.

Three LMI options are available on [ODOE's program webpage](#). Options 1-2 require an eligibility notice of participation in any of the public assistance programs listed on the form from the authority that operates the program (within the last seven months). Option 3 requires a tax transcript. Tax returns will not be accepted. If the tenant is not eligible under options 1-3, no exceptions will be made.

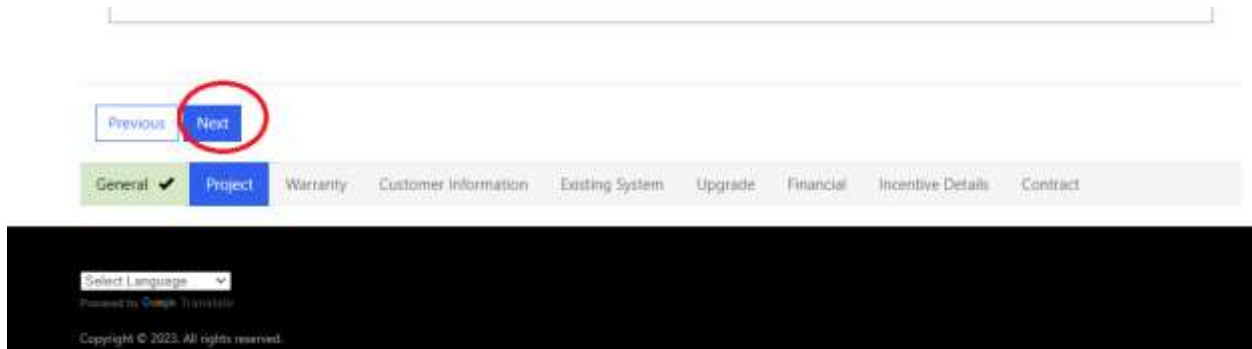
## RESERVATION TIPS

**Required Fields.** Required fields will be marked with a \* — see image below for example



The screenshot shows a web form titled "Reservation Application". Under the heading "Heat Pump System Specification", there are four input fields. The first field, "What is the type of heat pump being installed?", has a red asterisk next to it, indicating it is a required field. The other three fields are: "What space will the heat pump provide heating and cooling for (e.g. bedroom, entire dwelling)?", "Replace or supplement existing system?", and "How ACCA Manual S capabilities used to determine the design load for the unit(s)?".

**Save Your Work.** Once you have finished inputting the information requested on a page, click the *Next* button to both save and proceed to the next page. If you ever wish to go to a previous page, be sure to click *Next* to save it first and then click *Previous*. If you leave the reservation and sign out, the next time you sign in, you will be taken to the same reservation and page you last saved.



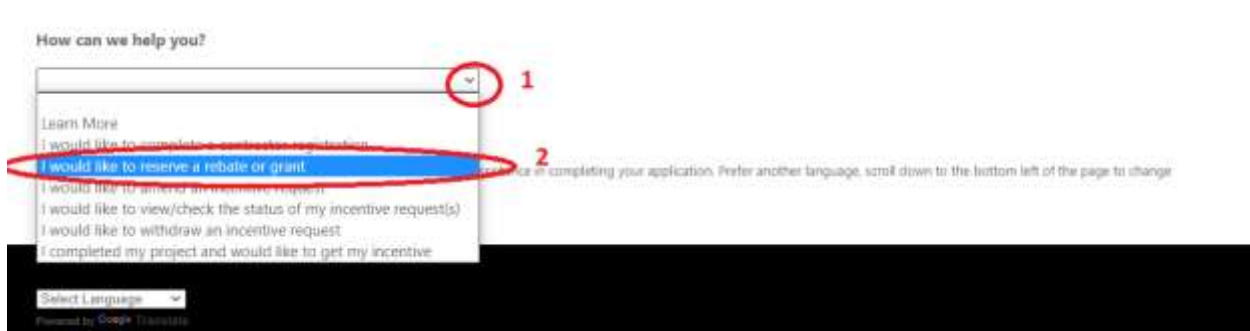
The screenshot shows the bottom navigation bar of the reservation application. It includes a "Previous" button and a "Next" button, with the "Next" button circled in red. Below these buttons is a horizontal menu with tabs: "General" (with a checkmark), "Project", "Warranty", "Customer Information", "Existing System", "Upgrade", "Financial", "Incentive Details", and "Contract". At the bottom, there is a "Select Language" dropdown menu, a "Powered by Google Translate" logo, and a copyright notice: "Copyright © 2023. All rights reserved."

## NEW RESERVATIONS

### How to Start

Select the drop down under the *How can we help you?* menu on the ORHHP page and select the *I would like to reserve a rebate or grant* option.

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To be eligible to receive rebates, you must fill out a rebate reservation request and receive approval from ODOE **prior** to installation. If you install a heat pump before submitting a reservation request, the request will be denied. If you submit a reservation but then install before receiving approval, we cannot guarantee you will receive your expected incentive amount — and the request cannot be amended after installation. We **highly recommend** waiting for approval before installation.

## General Tab

On this first tab, you will confirm basic contractor information. This information will be auto-populated from the information input for Contractor Registration.

A screenshot of the "General Tab" form. The form contains several input fields: "Contractor Email" (with "example@email" entered), "Organization Name" (with "Contractor Business Name" entered), "Street Address" (with "Business Address" entered), "City" (with "Salem" entered), "State" (a dropdown menu), "Zip Code" (with "97363" entered), "County" (empty), "Installer First Name" (empty), "Installer Last Name" (empty), and "Oregon Construction Contractors Board Number" (empty). At the bottom, there is a "Next" button and a navigation bar with tabs: "General", "Project", "Warranty", "Customer Information", "Existing System", "Upgrade", "Financial", "Incentive Details", and "Contract". The "General" tab is currently selected.

## Project Tab

On this tab, please provide information about the heat pump unit to be installed, including product specifications and product sizing calculations. (Heating and cooling load calculations in BTU)

You will also be asked what space the heat pump will be installed. Keep in mind that per [OAR 330-280-0030](#) space only used for storage is not eligible.

When answering whether you will be replacing or supplementing the current heating/cooling system please copy and paste all answers that apply. See example below.

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Will you be replacing, or supplementing the current heating/cooling system? (e.g. Fully replace existing heating system, Fully replace existing cooling system, Provide new heating system (no existing system or non-functional existing system), **Provide new cooling system** (no existing system or non-functional existing system), Supplement or offset existing heating system, Supplement or offset existing cooling system).\*

Fully replace existing heating system, Provide new cooling system

If the contractor is not using Manual S or J, then there is the option to apply “equivalent energy efficiency industry standards for sizing equipment.” ODOE will determine whether standards applied are sufficient.

At minimum, an alternative method should include a description of what observations about the home (size, including square footage and/or ceiling height), layout, insulation, type of construction, air tightness, etc.) you are considering. Please also include how you calculate the heating/cooling load for this particular house/apartment etc. when determining the appropriate size and type of equipment. It should not be a general statement like “all apartments less than X square footage get Y size equipment.”

*Oversized equipment is one of the leading causes of inefficiency in new installations, especially for heat pumps with single speed motors.*

Contractors must now describe the methodology used to size and select the equipment as well as attest that the heat pump is appropriately sized to the space.

Describe the methodology you used to size and select the equipment: \*

describe methodology used.

By checking this box, I attest that the heat pump is appropriately sized to the space or structure in this reservation. \*

## AHRI

To identify the heat pump system being installed, provide either the AHRI Certified Reference Number or the Unit Brand and Model. If available, upload an AHRI Certificate of Product Ratings for the indoor and outdoor units of the heat pump system:

AHRI Certified Reference Number

AHRI Certified Reference Number

00000

AHRI Certificate \*

Change File

AHRICertificate for RXL12MVJU9.pdf

Delete

An AHRI including the HSPF2 and SEER2 is a required upload to ensure that the heat pump meets our efficiency requirements.



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## HSPF and SEER requirements:

If a split-system, single-package system, or ducted heat pump is being installed, provide the Heating Seasonal Performance Factor and Seasonal Energy Efficiency Ratio.

Heating Seasonal Performance Factor	Unit for HSPF
<input type="text" value="10.00"/>	<input type="text" value="HSPF2"/>
Seasonal Energy Efficiency Ratio	Unit for SEER
<input type="text" value="22.00"/>	<input type="text" value="SEER2"/>

A heat pump eligible to receive a rebate must meet or exceed the following requirements:

- (a) A split-system heat pump that has a Heating Seasonal Performance Factor of HSPF2 of 7.5 and a Seasonal Energy Efficiency Ratio of SEER2 14.3.
  - (b) A single-package heat pump that has an HSPF2 of 6.7 and a SEER 2 of 13.4.
  - (c) A closed loop water-to-air heat pump that has an EER of 17.1 and a COP of 3.6.
  - (d) An open loop water-to-air heat pump that has an EER of 21.1 and a COP of 4.1.
  - (e) A closed loop water-to-water heat pump that has an EER of 16.1 and a COP of 3.1.
  - (f) An open loop water-to-water heat pump that has an EER of 20.1 and a COP of 3.5.
  - (g) A direct geexchange heat pump that has an EER of 16.0 and a COP of 3.6.
- (2) A heat pump eligible to receive additional funds as a **higher efficiency heat pump** must meet or exceed the following requirements:
- (a) A ductless split-system heat pump that has a Heating Seasonal Performance Factor of HSPF2 of 8.1 and a Seasonal Energy Efficiency Ratio of SEER2 16.
  - (b) A ductless single-package heat pump that has an HSPF2 of 8 and a SEER 2 of 16.
  - (c) A ducted air source heat pump, either packaged or split system that has an HSPF2 of 8.55 and a SEER2 of 16.
  - (d) A closed loop water-to-air heat pump that has an EER of 18 and a COP of 3.8.
  - (e) An open loop water-to-air heat pump that has an EER of 22 and a COP of 4.3.
  - (f) A closed loop water-to-water heat pump that has an EER of 17 and a COP of 3.3.
  - (g) An open loop water-to-water heat pump that has an EER of 21 and a COP of 3.7.
  - (h) A direct geexchange heat pump that has an EER of 17 and a COP of 3.8.

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## Warranty Information Tab

The screenshot shows the 'Reservation Application' page with the 'Warranty Information' section active. It contains three text input fields for warranty details, each followed by a 'Years' label. Below the fields are 'Previous' and 'Next' navigation buttons. At the bottom, a progress bar shows 'General' and 'Project' as completed steps, 'Warranty' as the current step, and 'Customer Information', 'Existing System', 'Upgrade', 'Financial', 'Incentive Details', and 'Contract' as remaining steps.

This tab collects information about product and labor warranty details for the installed unit.

Warranty requirements are detailed in [OAR 330-280-0030\(1\)\(k\)](#) and (1)(l): The heat pump system must include at least a five-year warranty against manufacturer defects. Installations of heat pump systems must include at least a one-year labor warranty covering the system.

Be sure that the warranty information entered on this page matches the warranty information on the signed installation agreement.

## Customer Information Tab

This tab requests information to identify the location and owner of the property where the unit will be installed.

The screenshot shows the 'Reservation Application' page with the 'Customer Information' section active. It features a dropdown menu for 'Dwelling Type' with three options: 'Residential Tenancy', 'Manufactured dwelling', and 'Recreational Vehicle'. Below the dropdown is a text input field. A note below the field reads: 'Provide the customer name, contact email address, and site address for the location the heat pump will be installed.'

Dwelling type will determine which incentives the project is eligible for. If the installation will occur at an **owner-occupied** manufactured dwelling or **RV in a rented space in a park**, select either the Manufactured home or RV option as dwelling type. If the manufactured home or RV is not in a park but is eligible because it is rented and has a tenant, select the *Residential Tenancy* option. For all other rental dwellings, select *Residential Tenancy*.



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## Reservation Application

### Dwelling Type

Residential tenancy

### Rental Agreement

[Choose File](#) No file selected

Provide the customer name, contact email address, and site address for the location the heat pump will be installed.

The *Rental Agreement* upload is **required** as proof of eligibility for the program. We require the entire document to be uploaded, not just a few pages. Upload the most current rental agreement. If the space is currently vacant you may upload a vacant agreement that includes the address, owner information, and owner signature. Alternatively, you may also submit a rental agreement for a previous tenant. A County Record from housing authority showing that the address is a rented will also be acceptable. New construction is **not eligible**, which includes dwellings that the owner plans to renovate to rent out. Select the electric utility of the project site.

Electric utility at project site:

If the project site utility is missing from the utility drop down list, please leave blank and click Next. On the Existing System Tab, please enter the utility information in the *If Other, Describe energy source:* field.

### Existing System Tab



The screenshot shows the 'Existing System' section of the 'Reservation Application' form. It contains a dropdown menu with the label 'What energy source is currently used to heat the space: \*'. Below the dropdown is a text input field with the label 'If Other, describe energy source:' and the text 'Missing Utility information' entered.

This tab collects information about the existing heating and cooling infrastructure at the target property. This information is used to calculate energy savings for agency reporting purposes and does not affect the incentive amount available to the applicant.

Note that this program does **not** require that existing heating/cooling systems are replaced by the newly installed heat pump.

### Upgrade Tab

In this tab, you may identify any upgrades associated with the heat pump installation.

*The below list outlines what would qualify as an eligible upgrade. ODOE will update this list throughout the duration of the program.*

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Current upgrades eligible for a grant include:

- Electrical upgrades
  - Electric panel upgrade costs needed to facilitate the installation of the heat pump
    - i.e., new circuits, breaker replacements
- Mechanical Upgrades
  - Installation of a pad for the compressor to comply with code standards
  - Duct repair
  - Duct sealing
  - Insulation
  - Sheet rock work needed to update the air handler space
  - Material and labor costs needed for line set if the existing system line set is corroded and needs to be replaced
  - Installing raised support structures when the installation occurs in a flood zone
  - Cabinet modifications needed for the air handler
  - Cut outs for ventilation
  - Making the previous air handler space bigger to fit the new equipment
  - Making the previous air handler code compliant
  - updating or modifying controls for existing distribution fans, and/or Updating thermostat controls.

Ineligible Costs:

- Adding electric resistance heat to areas such as base boards or wall mounted heaters
- Installation of heat pump

Example of upgrade description:

The screenshot shows a 'Reservation Application' form with the following content:

Are you applying for a grant for upgrades to facilitate the installation of a heat pump? \*

Yes

If you are not applying for a grant for upgrades, you may skip to the financial page.

If you are applying for a grant, what type of upgrade are you requesting a grant for?

Electrical only

If applicable, describe the electrical upgrade:

Electrical panel upgrades, new circuit needs to be added for the heat pump.

If applicable, describe how the electrical upgrade assists the installation of the heat pump:

Needed to make the installation of the heat pump code compliant.

If you are unsure whether an upgrade is eligible, you should include the upgrade in the request and explain in the application how the upgrade assists the installation of the heat pump. **A grant request for upgrade costs must receive approval prior to beginning work.**

If requesting the grant, be sure that costs associated are listed on the installation agreement or please upload the subcontracted work invoice with the installation agreement. We will need to verify that the costs match the requested

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amount. Be sure to include a separate line item on the installation agreement for both the rebate amount and grant amount.

Example of Installation agreement with ODOE Rebate and Grant:

<u>System Cost</u>	
Equipment cost.....	\$2,705
Mechanical permit.....	\$140
Labor and Materials.....	\$1,855
Total System Cost:.....\$4,700 <b>1</b>	
Cost to upgrade electrical system to accommodate new heat pump.....\$900 <b>1</b>	

Expected ODOE Incentive amounts:

Heat pump installation rebate: \$2,820 <b>2</b>	Total costs: \$5,600
Grant for Electrical system Upgrades: \$900 <b>2</b>	

1. The total costs related to the rebate for the installation and labor associated with the installation of the heat pump needs to be completely separate from the costs associated with the upgrade, in this case the electrical upgrade costs. The total costs of the installation of the heat pump are shown in the red box 1. The total costs associated with the upgrade are shown in the blue box 2. As reviewers, we are looking to make sure that the costs you will later enter on the Financial tab in the reservation match the figures shown in the first box(es). The total costs for the entire project in this case are shown in the green box.
2. Both the expected ODOE rebate (red box 2) and the expected ODOE grant (blue box 2) need to be on the signed installation agreement.

## Financial Tab

On this tab, you will list the cost of the purchase and installation of the heat pump unit, and, separately, the total cost of any proposed upgrades. (figures in the example match the example installation agreement in the previous section)

**System Cost**

Total purchase and installation cost of heat pump system: \$ \*

A.

Other incentives received, or expected to be received, for the purchase and installation of the heat pump system:

\$	<input type="text" value="\$ 0.00"/>	Incentive from:	<input type="text"/>
\$	<input type="text" value="\$ 0.00"/>	Incentive from:	<input type="text"/>
\$	<input type="text" value="\$ 0.00"/>	Incentive from:	<input type="text"/>

**Upgrade Cost**

Total cost of the upgrades: \$ \*\*

C.

Other incentives received, or expected to be received, for the upgrades:

\$	<input type="text" value="\$ 0.00"/>	Incentive from:	<input type="text"/>
\$	<input type="text" value="\$ 0.00"/>	Incentive from:	<input type="text"/>
\$	<input type="text" value="\$ 0.00"/>	Incentive from:	<input type="text"/>

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- A. Enter in the subtotal of the heat pump purchase and installation costs before any incentives or rebates. This number should *not* include any costs being submitted as project upgrades. (we are looking to see that this figure matches on the installation agreement.)

This tab is also where you list any known existing or anticipated rebates or other incentives that will be applied toward these costs. These include incentives from a utility, Energy Trust of Oregon, a non-profit, or another organization offering financial assistance for the project.

ODOE has a working relationship with many of the entities offering heat pump incentives and plans to implement information-sharing practices with them to facilitate tracking of project incentives to ensure that stacked incentives do not exceed 100% of the costs of purchase and installation.

- B. Enter other incentives received or anticipated for the project, including Energy Trust of Oregon Incentives. *The \$200 Portland General Electric discount or other discounts applied automatically to the heat pump cost do not need to be entered in this section. Federal Tax credits the owner intends to file for do not need to be included in this section.*
- C. Enter the total costs for the electrical and mechanical upgrades. There must be a line item in the installation agreement describing the work needed for the upgrade grant as well as the expected ODOE grant amount. Grant amounts will pay up to 100% of the upgrade costs — or up to \$2,000 for non-low and moderate income (LMI) and up to \$4,000 for LMI eligibility.

This tab also asks whether the project will be for a higher efficiency heat pump (efficiencies shown in project tab section) and/or will be for a low- or moderate-income household. Answering this in the affirmative directs the form to calculate the anticipated incentive amount that may be offered for a higher efficiency heat pump or LMI-qualified household. *Note* that the available incentive amount will be lower if the LMI documentation submitted does not meet program requirements. In order for the LMI incentives to be granted, both the LMI verification form and the LMI evidence must be provided.

If the heat pump meets these efficiency requirements and you would like to reserve the high efficiency incentive amount, select the Yes option for *Are you applying for a rebate for installing a higher efficiency heat pump?* Example below.

## Incentive Calculation

**Are you applying for a rebate for installing a higher efficiency heat pump? \***

The image shows a screenshot of a web form. At the top, there is a question: "Are you applying for a rebate for installing a higher efficiency heat pump? \*". Below the question is a dropdown menu. The menu is currently open, showing four options: "Select", "Select", "Yes", and "No". The "Yes" option is highlighted in blue. Below the dropdown menu, there is another dropdown menu that is currently closed, showing the word "Select" and a downward arrow.

If the tenant of a residential tenancy or owner-occupant of a manufactured dwelling or RV in a park meets the eligibility requirements for the low or moderate income (LMI) eligibility, upload documentation for *all* relevant fields:

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If you are applying for a rebate that meets the low- or moderate-income eligibility requirements, please select the eligibility criteria.

1. Select the *Low Medium Income* option if they qualify via LMI options 2-3. Select the *Affordable Housing Provider* option if they qualify via option 1. Check the Qualify through a program box if the tenant qualifies via options 1 or 2.
2. All option types require form upload as well as evidence. The low and moderate income option forms can be found under the forms section of the program webpage. The option form should be uploaded in the first upload field *Low- or moderate-income verification form*. The tenant evidence of participation in the program or their tax transcript(s) should be uploaded in the second upload field.

See the photo below for which rebate type and checked boxes example for each option type.

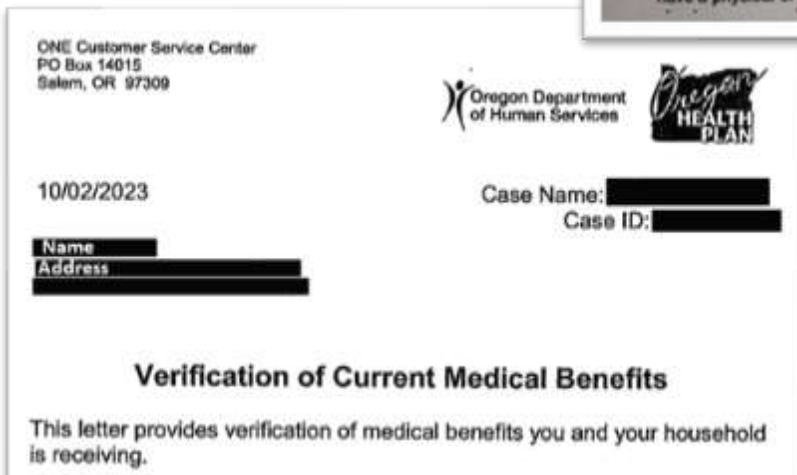
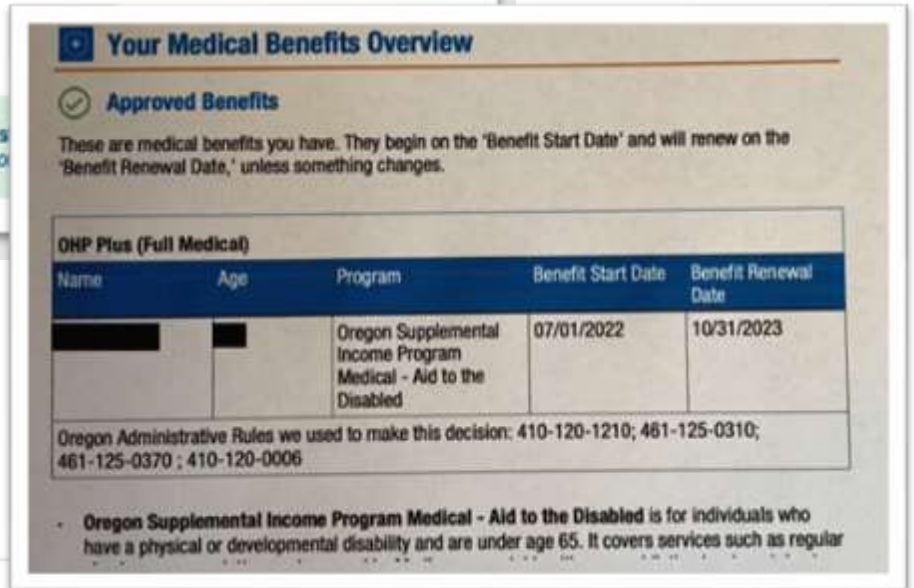
3. Low- or moderate income option 1:
  - a. LMI option 1: Affordable Housing Providers: Most of the providers can be found on this [OHCS page](#). In the Spreadsheet located under the Funded Rental Developments section. If applying for a higher incentive because the tenant participates in one of the following programs an Affordable Housing [option 1](#) form along with applicable proof will need to be submitted with the initial reservation.
    - A housing capital funding offering issued through a Notice of Funding Availability
    - Low Income Housing Tax Credits
    - Oregon Multifamily Energy Program

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- Conduit/Pass-Through Revenue Bond Financing Program
- Local Innovation and Fast Track Housing Program
- Loan Guarantee Program and General Guarantee Program
- Oregon Rural Rehabilitation Loan Program
- Housing Choice Voucher Program (Section 8)

Acceptable proof: If the resident of a residential tenancy dwelling type resides in housing listed on the OHSC spreadsheet, the spreadsheet may be submitted as proof of participation in the program. The tenant's letter of eligibility will also be accepted.

4. Low- or moderate income option 2: LMI option 2 requires a letter of eligibility or benefits overview **from the authority providing the program** within the **last seven months**.
  - a. Examples of acceptable proof are (examples only show partial documents, full document must be submitted):
    - i. OHP evidence examples:





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ONE Customer Service Center  
PO Box 14015  
Salem, OR 97309

07/20/2023

**From authority that provides SNAP benefits**

Case Name: [REDACTED]  
Case ID: [REDACTED]

Name: [REDACTED]  
Address: [REDACTED]

**Verification of Current Food Benefits**

This letter provides verification of food benefits you and your household is receiving. Your household currently gets:

[REDACTED] Supplemental Nutrition Assistance Program (SNAP) food benefits per month.

The following individuals are on your case:

Name: \_\_\_\_\_  
[REDACTED]

Customer Service Center  
Box 14015  
Salem, OR 97309

Date: 07/11/2023

Your Case ID: [REDACTED]

Oregon Department of Human Services

**Your SNAP Benefits are Approved with Changes**

Client Name and site address: [REDACTED]

- ii. SNAP benefits examples
- iii. Housing Choice Voucher Program (Section 8)

**Housing Assistance Payments Contract (HAP Contract)**  
**Section 8 Tenant-Based Assistance**  
**Housing Choice Voucher Program**

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

- iv. Low Income Home Energy Assistance Program (LIHEAP)

APPLICANT INFORMATION			
Applicant	[REDACTED]		
Physical Address	[REDACTED]		
PAYMENT INFORMATION		Authorization #	
Payment Type	Standard	[REDACTED]	
Program	LIHEAP 2023	[REDACTED]	
PAYMENTS			
Vendor	PACIFICORP	Account #	[REDACTED]
Name on Account	[REDACTED]	Payment Status	Agency Paid
Amount	\$290.00	Account Status	CURRENT
Business Energy	Y		

You're our number one priority. We wanted you to know that an energy assistance pledge has been made on your electric account using our safe and secure online portal. As soon as we receive the funds from the agency, the pledge will be applied to your account balance.

Pledged: \$290.00

Agency: UCAN (LIHEAP) [REDACTED]

Account: [REDACTED]

Information made available to UCAN (LIHEAP DOUGLAS & JOSEPHINE COUNTIES) through our online portal is limited to billing, payment history and energy usage. No personal information is available, and any information obtained by the agency is for their use in administering energy assistance pledges, qualifications and review. If you or anyone in your household did not seek energy assistance, please call us. Any of our customer care specialists will be happy to assist you. Thank you for being our customer.

Sincerely, Pacific Power

5. Low- or moderate income option 3: select the *Low Medium Income* option if they qualify via LMI option 3. Check the Qualify through Tax transcript box as well.
  - a. LMI option 3 requires a **tax transcript**. **Tax returns, W-2s, and Paystubs will NOT be accepted** as they contain sensitive information. Tax transcripts can be requested online here <https://www.irs.gov/individuals/get-transcript>



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Copy of the installation agreement. This should show the address where the installation will occur, the customer name, the cost, equipment details, and warranty information. \*

No file selected

## Contract Tab

On the final application tab, you can review and upload requested documentation including:

- AHRI Certificate (not required but does help us to process reservations more quickly)
- Rental Agreement
- Low- or moderate-income verification form
- Low- or moderate-income evidence
- Installation agreement

Once all information is complete and an electronic signature provided, the applicant can submit the application.

Signature

Example

Date

Example

Once the reservation has been submitted you will see the following screen. You will also receive an email informing you of the submission and the reservation number (ORHHP-XXXX). If you have any questions regarding the reservation, please include the reservation number in the subject line to [Rentalhome.heatpump@energy.oregon.gov](mailto:Rentalhome.heatpump@energy.oregon.gov). Or have the reservation number ready when calling (503) 378 – 4040 so that we can better answer questions regarding the reservation.

## Reservation Application

Submission completed successfully.

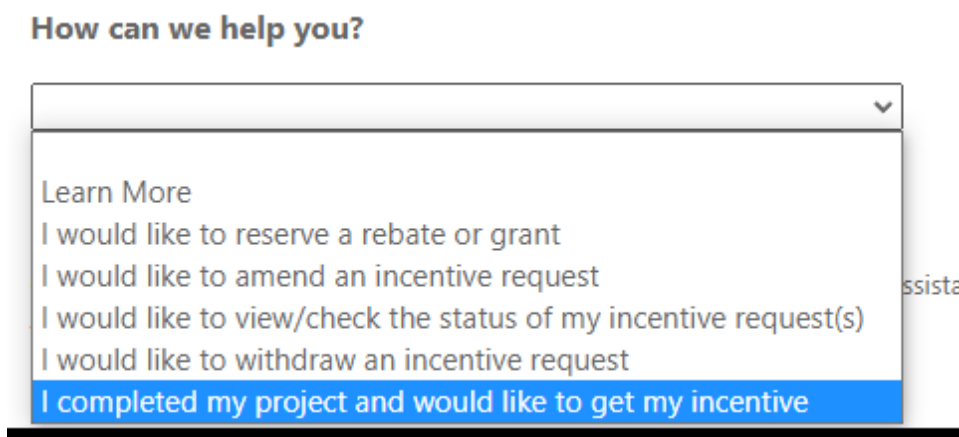
# Oregon Rental Home Heat Pump Program Guide

## Project Completion Guide

### ACCESSING THE CUSTOMER DASHBOARD

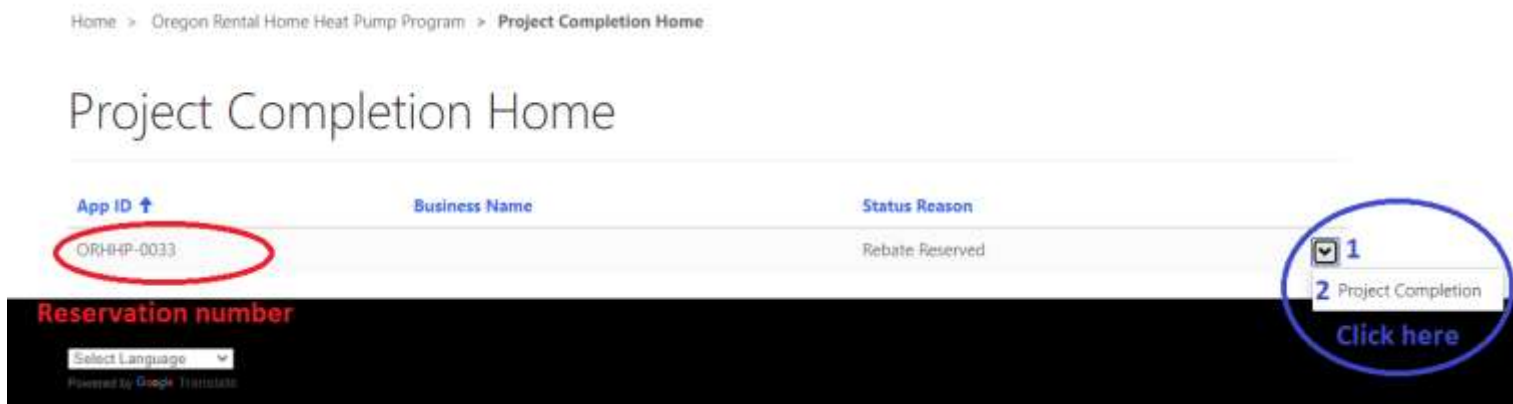
Log in to ODOE's customer portal using the same log in information used to reserve the incentive(s).

Scroll down to the *How can we help you?* Menu.



Select the *I completed my project and would like to get my incentive* option from the dropdown menu.

Next you will be taken to a list of reserved reservations that are eligible for project completion. Click the arrow next to the reservation of the installation that has been completed. Select the *Project Completion* option to continue with your project completion for the selected reservation.



### BEFORE YOU BEGIN

The requested documentation needed for the Project completion step includes:

1. Date of final inspection
2. Subcontractor information (If a subcontractor is used in the installation):
  - a. Name
  - b. CCB #
  - c. Invoice
3. Final Heat Pump installation invoice that includes:
  - a. Customer name, installation address
  - b. The contractor's name

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- c. A description of the work conducted
  - d. The net cost to the customer with an itemized list of the work completed (the same format we required to be submitted with your reservation)
  - e. Incentives listed individually
  - f. Date the work was conducted
4. Final Permits for any work completed including subcontracted work.
  5. A signed [Project Completion Statement Form](#).

## Section 1: Questions

Please review the information submitted during the rebate reservation application. If there have been changes since the information was submitted, please amend the information before submitting the rebate request. (\* indicates required fields)

- 1. Date heat pump installation completed. This is the date the heat pump installation passed its final inspection by the authority having jurisdiction. \***

Please enter date as MM/DD/YYYY

- 2. Was the heat pump system installed in accordance with the manufacturer's specifications? \***

- 3. Was the heat pump's auxiliary heat control set at or below a temperature of 35 degrees Fahrenheit? \***

- 4. Was the heat pump system new? A new heat pump is one that had not previously been used to provide heating or cooling. \***

- 5. What are the projected energy savings from the installation of the heat pump? \***

To estimate the energy savings from the installation of the heat pump. Refer to the NW Power and Conservation Council, Regional Technical Forum's "Unit Energy Savings" (UES) measures to develop energy savings estimates. (<https://rtf.nwcouncil.org/measures/?status=active&ors=residential>)

Question 1: Enter the date in which the heat pump installation passed its final inspection.

Questions 2-4: Answer either Yes or No to the questions asked according to the installation.

Question 5: "What are the projected energy savings from the installation of the heat pump?"

For question 5 we currently have a draft guide (please email [rentalhome.heatpump@energy.oregon.gov](mailto:rentalhome.heatpump@energy.oregon.gov) to receive the draft guide) for how to calculate the energy savings using the website listed in the question. We are looking for the projected energy savings in kWh per year for the expected lifespan of the heat pump. We understand that this resource is difficult to use and without a finalized guide to use it, we will accept your best estimate for this section.

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## Section 2: Subcontractor Information

If you used a subcontractor in the installation of the heat pump or for upgrades to facilitate the installation of a heat pump, list the business name and CCB number for each:

Subcontractor #1 Name:	<input type="text"/>
Subcontractor #1 CCB number:	<input type="text"/>
Subcontractor #2 Name:	<input type="text"/>
Subcontractor #2 CCB number:	<input type="text"/>
Subcontractor #3 Name:	<input type="text"/>
Subcontractor #3 CCB number:	<input type="text"/>

In this section enter the name and CCB number of any subcontractors that helped with the installation of the heat pump.

## Section 3: Permit, Invoice, and Completion Form Upload

Doc upload: All heat pump permits received from authority having jurisdiction:

Permit 1

[Choose File](#) No file selected

Permit 2

[Choose File](#) No file selected

In this section, upload the final permits received for the installation of the heat pump.

**Upload an invoice.**

- 1. The invoice should show the site owner's name, the site address, the contractor's name, a description of the work conducted, the cost to customer of work broken up by each component of the work, incentives listed individually, and the date the work was conducted on.**

[Choose File](#) No file selected

- 2. Statement that value of rebate, and if applicable, grant have been passed on to the customer as a reduction in the net cost.**

[Choose File](#) No file selected

In part 2 of this section, upload the following materials:

1. The final invoice of the installation. We are looking for an invoice that includes:
  - a. Customer name, installation address
  - b. The contractor's name
  - c. A description of the work conducted
  - d. The net cost to the customer with an itemized list of the work completed (the same format we required to be submitted with your reservation)
  - e. Incentives listed individually (Rebate and upgrade grant if applicable)
  - f. Date the work was conducted



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2. The [Project Completion Statement Form](#). Upload this form where it says, “Statement that value of rebate, and if applicable, grant have been passed on to the customer as a reduction in the net cost.”

## Section 4: Upgrade Completion

### Upgrade Completion

Complete the upgrade completion section only if you are applying for a grant for upgrades to facilitate the installation of a heat pump.

1. This is the date the work was completed or if required the date the final inspection by the authority having jurisdiction was passed:

Please enter date as MM/DD/YYYY

2. All upgrade permits received from authority having jurisdiction

#### Upgrade Permit 1

No file selected

#### Upgrade Permit 2

No file selected

In the final section, enter in the requested information for the Upgrade Grant, if applicable. We ask for:

1. The date the work was completed or date of the final inspection
2. Uploads for the permits received. If there is only one permit and the work was subcontracted, you may upload the subcontractors’ invoice in either place. Alternatively, you may combine the two invoices (yours and the subcontractors) into one file and upload them in the invoice requested in section 3.

Finally, once all information is complete and uploaded, click *Submit* to submit your project completion and receive your incentive(s)!

## Section 5: Completion

Project completions will be processed in the order in which they are received. Payments through paper check may take 2 weeks to receive once approved. If you would like to receive payments electronically you will need to submit a [Direct Deposit Authorization Form](#) to the Department of Administrative Services. Payments can take up to two weeks to receive after the review and approval of a project complete request.

Staff will review your completed materials before approval, and if we determine that your project is incomplete, we will contact you via email to request further information.

Unlike reservations **you will not be able to amend project completions**. You will need to send any requested items **via email response** to the request email. [00]

### Extensions:

If your reservation is coming up on expiration you can request the reservation be extended. To do so, you will need to select the ‘I would like to amend an incentive request’ option from the *How can we help you?* drop down menu.

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## How can we help you?

I would like to amend an incentive request

Next select the drop down next to the reservation you wish to extend and click *Amend*.

App ID ↑	Business Name	Status Reason	
ORHHP-0052		Reservation Submitted	<input checked="" type="checkbox"/> Amend Reservation

Scroll down to the very bottom of the reservation. Above the Contract signature and date there is a question that states; *A reservation for a rebate is valid for 180 days and can be extended for another 180 days. Are you requesting an extension to your reservation?*

A reservation for a rebate is valid for 180 days and can be extended for another 180 days. Are you requesting an extension to your reservation?

Yes  
No

### Contract

Signature

Date

Submit

Select the Yes option in the drop down for that question. Finally click submit and your reservation is extended. You will know the action has been completed when you see the following message;

## ORHHP Amend

Note that \* denotes Required Fields.

Submission completed successfully.

X

## Coming Soon..

- How to view reservations submitted
- How to withdraw reservations
- How to Amend Incomplete reservations