



Application Form for Residential Energy Tax Credit Certification — Instructions  
**Solar Pool Heating System**

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**Oregon Department of Energy**

**ELIGIBILITY** – To qualify for a tax credit, you must have an Oregon income tax liability. The solar pool heating system must be attached to real property associated with you primary or secondary residence. The collector must have a warranty of at least 10 years (copy of warranty is required). The collector area must exceed 40 percent of the pool area if a pool cover is present and 60 percent of the pool area if no pool cover is present. The tax credit is claimed when you file your state income tax. Systems must be installed according to state license and permitting laws.

**CREDIT AMOUNT** - The Oregon Residential Energy Tax Credit Program provides a tax credit for solar water heating systems based on estimated annual savings. The savings for each qualifying system is estimated using the collector area and where in the state it is located. The credit is based on \$0.15 per kWh of estimated savings. The maximum credit that can be claimed for any system is \$1,500 or 50 percent of the system cost, whichever is less. The amount of the tax credit may be reduced if the system has losses from sub-optimal tilt, orientation or external shading. The attached “sunchart” worksheet is used to determine the combined impact of tilt, orientation and external shading on system performance.

**SYSTEM VERIFICATION** – Although NOT required for pool heating systems it is recommended that the system’s performance and quality be verified by a tax-credit certified solar technician. A list of companies that employ tax-credit certified technicians can be found on the Oregon Department of Energy’s Web site ([www.oregon.gov/energy](http://www.oregon.gov/energy)).

**PASS-THROUGH OPTION** – If you are an Oregon resident and do not have an Oregon income tax liability, you may choose to transfer your tax credit to an Oregon resident or business that does. The Pass-through Option will allow you 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. 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 Department of Energy will then issue the tax credit certification to the pass-through partner. There may be tax implications. We advise you to consult with your tax preparer.

**PROCESS** – Don’t wait to apply for the tax credit. The Oregon Department of Energy should receive the application **no later than April 1** of the year following the purchase to get a tax credit Certificate back by the April 15 filing deadline.

Take the following steps to receive your tax credit:

1. **Submit a completed Application and Verification Form for Tax Credit Certification Solar Pool Heating System.** Your solar technician should complete the technical sections, sun chart, and the technician verification section of the form. Once completed, mail the signed application to the Oregon Department of Energy. Include the sun chart, proof of payment (dated receipts, contracts, or invoices marked paid by your technician). If the paperwork you submit demonstrates that your system qualifies for the tax credit, the Oregon Department of Energy will approve your application and send you a signed Certification specifying the qualifying tax credit amount.

2. **Claim the tax credit on your state income tax form.** Keep your Certification, a copy of your application, and proof of payment with your tax records. (Do not attach them to your tax return.) If your return is audited, the Oregon Department of Revenue will request copies of the information from you. Tax credits not taken in the first year may be carried forward up to five years. 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.

If you have any questions, please call the Oregon Department of Energy toll-free: 1-800-221-8035. (In Salem, call 503-378-4040.) Or consult the Department of Energy Web site ([www.oregon.gov/energy](http://www.oregon.gov/energy)).





Application and Verification Form  
for Residential Energy Tax Credit Certification

# Solar Pool Heating System

## 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](http://www.oregon.gov/energy)

**Don't forget...**  
...to sign your application  
and include your receipt

<b>1. APPLICANT INFORMATION (Homeowner completes)</b>			
Name:		Social Security No.*:	
Mailing address:		Daytime phone:	
City:	Oregon County:	State:	Zip:
Site address (if different):			
City:	Oregon County:	State:	Zip:
If different than mailing address, please explain:			
Name of electricity utility company:			
Name of natural gas utility company:			
Installation date:		Number of people in household:	
Cost of system: \$			
<b>2. SYSTEM DESCRIPTION</b>			
<b>Pool</b>			
1. Pool Area	_____	ft <sup>2</sup>	
2. Pool location (indoor/outdoor)	_____		
3. Pool side insulation (R-value)	_____	hr-ft <sup>2</sup> -°F/Btu	
4. Pool insulation blanket (yes/no)	_____		

\* The request for your Social Security Number is authorized by Section 405, Title 42, of the United States Code. You must provide this information. It is used to establish your identity for tax purposes only.

FOR OFFICE USE ONLY
File no.:
Date received:
Tax credit amount: \$
Tax year:

## 2. SYSTEM DESCRIPTION (Continued)

### Solar Equipment

5. Collector manufacturer: \_\_\_\_\_ Model: \_\_\_\_\_
6. Collector Area (each): \_\_\_\_\_ ft<sup>2</sup>
7. Number of Collectors: \_\_\_\_\_
8. Total Collector Area (line 6 x line 7): \_\_\_\_\_ ft<sup>2</sup>
9. Pool collector warranty period (**please attach a copy**) \_\_\_\_\_ years

## 3. SYSTEM PERFORMANCE ESTIMATION

### Tilt and Orientation Factor and External Shading

10. Tilt of collector surface ..... \_\_\_\_\_ degrees
11. Orientation of solar modules (0 = North, 90 = East, 180 = South, 270 = West) ..... \_\_\_\_\_ degrees
12. Tilt and Orientation Factor (from TOF graph) ..... \_\_\_\_\_ %

### Shading Impact

13. Percent not shaded (From Sun Chart Worksheet) ..... \_\_\_\_\_ %

### Total Solar Resource Fraction (TSRF)

14. Total Solar Resource Fraction (TSRF = line 12 x line 13) ..... \_\_\_\_\_ %

(example if TOF = 84% and percent not shaded = 95% then TSRF = 0.84 x 0.95 = 0.798 = 79.8%)

### Estimated Annual Production

15. Solar Pool Output appropriate climate zone<sup>1</sup> ..... \_\_\_\_\_ kWh/ft<sup>2</sup>
16. Annual Yield (line 8 x line 14) ..... \_\_\_\_\_ kWh
17. Adjusted Annual Yield (line 16 x line 14) ..... \_\_\_\_\_ kWh

## 4. TAX CREDIT CALCULATION

- If **TSRF** ≥ 75% Tax Credit = line 16 x \$0.15 = \$ \_\_\_\_\_
- If **TSRF** ≥ 50% but < 75% Tax Credit = line 16 x \$0.1125 = \$ \_\_\_\_\_
- If **TSRF** < 50 % system is not eligible Tax Credit = \$0.00 \$ \_\_\_\_\_

**AMOUNT MAY NOT EXCEED \$1,500, or 50% of the system cost which ever is LESS**

<sup>1</sup> Solar CLIMATE ZONES Yields

Zone 1 (Northwest Oregon)

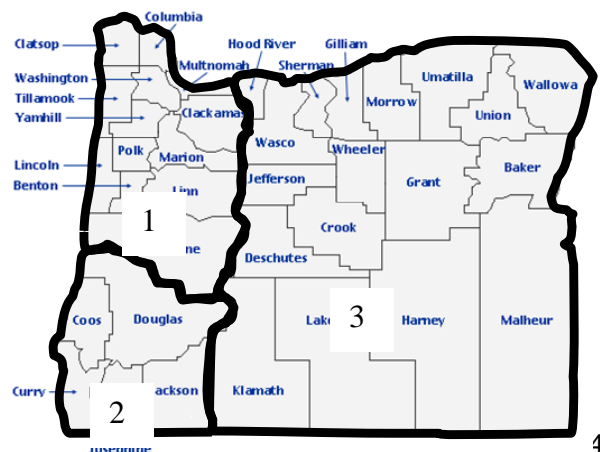
Zone 2 (Southwest Oregon)

Zone 3 (Eastern Oregon)

Solar Pool Output = 30 kwh/ft2

Solar Pool Output = 30 kwh/ft2

Solar Pool Output = 35 kwh/ft2



## 5. PASS-THROUGH OPTION (Homeowner completes)

**No - I want to keep the full tax credit myself**

**Yes - I want to transfer my tax credit to another Oregon resident (see below)**

If you are an Oregon resident, the Pass-through Option will allow you transfer your tax credit to an individual or business with an Oregon tax liability who will make a lump-sum payment to you equal to a percent of the certified tax credit amount (amount determined by Oregon Department of Energy). To use this 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 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 Department of Energy will then issue the tax credit certification to the pass-through partner. **Important: There may be tax implications. We advise you to consult with your tax preparer.**

## 6. VERIFICATION (Technician completes, homeowner reviews)

### **Annual Energy Production and Savings**

1. Estimated annual useful energy production of system: \_\_\_\_\_ kWh per year
2. Value of this energy at 8 cents per kWh = \$ \_\_\_\_\_ per year

### **System Documentation**

3. The owner has received a system manual and instruction for the regular and emergency operation and required maintenance of the system.
4. The system has been properly permitted and inspected by local code jurisdiction.  
Jurisdiction: \_\_\_\_\_ Permit number: \_\_\_\_\_

### **System Quality and Longevity**

5. The system is designed for optimal energy performance, safety and longevity.
6. The owner has received a written \_\_\_\_\_ month full warranty for the system. The Oregon Department of Energy requires a minimum 10-year warranty on a solar collector. (Attach a copy to application.)

I verify the above six items are true and that this system meets all the requirements of ORS 469.160 through 469.180 and complies with all local building code requirements. Should the Oregon Department of Energy require changes in the system to make it conform to ORS 469.160 through 469.180 and OAR 330-70-010 through 330-70-097, the installer/technician agrees to make such changes. By signing below, I certify that the system described in this application is installed and that **ALL the information contained herein is accurate and true.**

Technician's name (please print): \_\_\_\_\_

Installation company: \_\_\_\_\_

Installation company CCB no.: \_\_\_\_\_ Phone No.: \_\_\_\_\_

Installer's signature: \_\_\_\_\_ Date: \_\_\_\_\_

## 7. HOMEOWNER APPLICATION SIGNATURE (Homeowner completes)

***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 this system. Department of Energy approval is only for purposes of obtaining the Oregon Residential Energy Tax Credit.***

***By signing below, I (we) certify that the system(s) described in this application is (are) installed and that the information contained herein is accurate and true.***

\_\_\_\_\_ I give the Oregon Department of Energy permission to inspect this installation upon agency request.  
Note: Refusing access for inspection may result in denial of this application.

\_\_\_\_\_ The solar technician and the technician's employer have provided me with an owner's manual, a written warranty and instructed me in its proper operation. Please review section 6 of this application to ensure you agree with technician's claims.

\_\_\_\_\_ **I have attached proof of payment** for this installation that includes an **itemized parts list**. (e.g. receipt of payment or a copy of the contract for the system marked "paid" and dated; or, for do-it-yourself systems, an itemized receipt of payment for materials).

\_\_\_\_\_ **I have attached a copy of my minimum 10 year pool collector warranty.**

What were you told the approximate savings by this system would be?     \$ \_\_\_\_\_ per year

We do not sell information from this application as a mailing list. However, the Oregon Department of Energy 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.

Signature of Purchaser: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Joint Purchaser: \_\_\_\_\_ Date: \_\_\_\_\_

Complete the following if two or more persons are purchasing this system **and** file separate tax returns.

Name: \_\_\_\_\_ Address: \_\_\_\_\_ % ownership: \_\_\_\_\_

Name: \_\_\_\_\_ Address: \_\_\_\_\_ % ownership: \_\_\_\_\_

Name: \_\_\_\_\_ Address: \_\_\_\_\_ % ownership: \_\_\_\_\_

**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.



# Solar Site Assessment

A tool for estimating the impact of collector tilt, orientation and shading

To estimate the performance of a solar energy system we need to know how much solar energy is available for your collector. This worksheet is used to estimate the impact of tilt, orientation and external shading on how much solar energy your solar collectors can collect. The Total Solar Resource Fraction (TSRF) represents the fraction of energy a particular collector would receive when compared to one in the same city, but that has optimal tilt, orientation and no external shading. For example, a collector with a TSRF of 80 percent indicates that 80 percent of the solar energy at your location over a year will be available to the solar collector.

For simplicity we have separated calculating the TSRF into two parts. The first part is to determine the impact of collector tilt and orientation. This Tilt and Orientation Factor (TOF) is estimated using one of the following plots. The second part is to use a sun chart to estimate how much energy is lost on an annual basis from external shading from plants, buildings or other obstructions. The combination of these two effects will provide your collector's TSRF.

TOF graphs (right) show the impact of tilt, and orientation on annual performance of a solar collector. TOF values range from 100% (no loss) at the center of the inner circle to less than 60% (40% or more loss) in the upper left and right corners.

Azimuth angles are based on true polar orientation, adjusted for magnetic declination (16-20 degrees for most of Oregon)

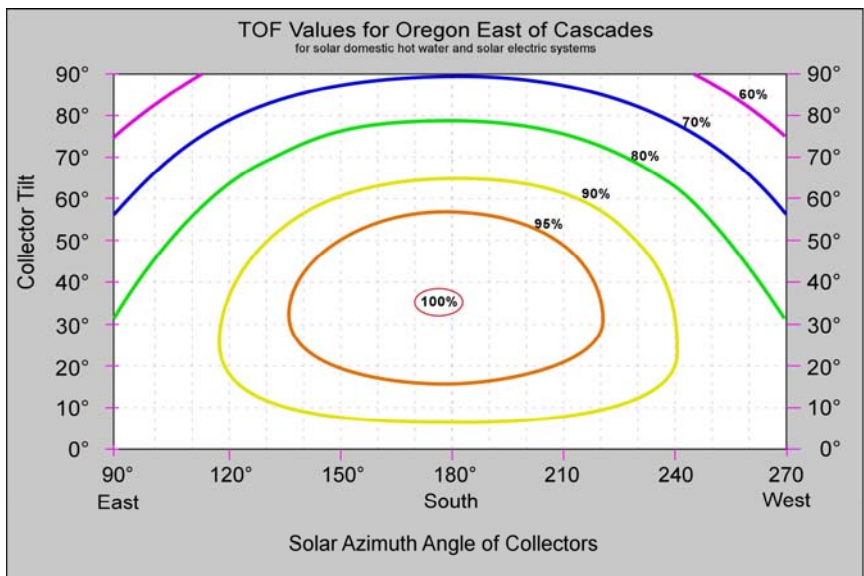
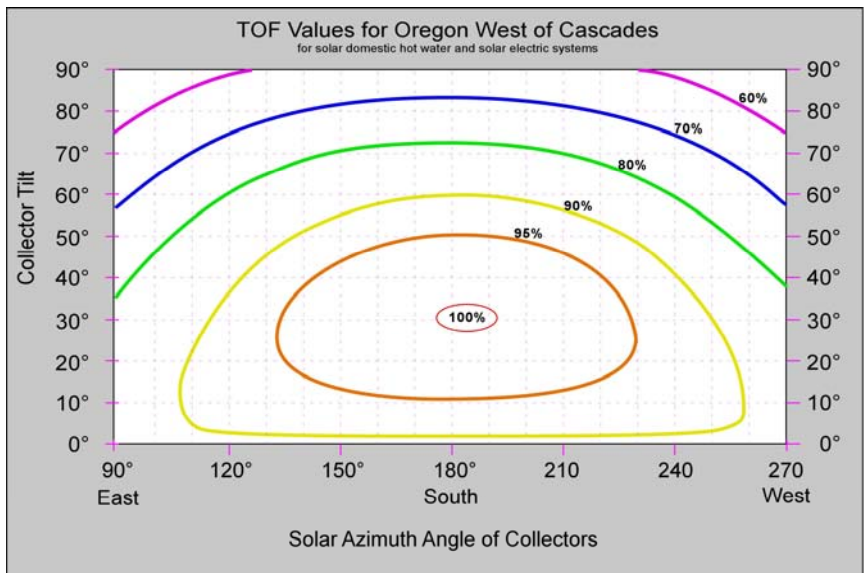
Use the upper graph if your system is installed West of the Cascades.  
Use the lower graph if your system is installed East of the Cascades.

Draw a dark X mark the graph for your collector's tilt and azimuth angle. Interpolate between the nearest two lines to estimate the TOF value to the nearest 1%.

Collector Tilt = \_\_\_\_\_ °  
(angle from horizontal)

Solar Azimuth = \_\_\_\_\_ °  
(collector orientation)

TOF = \_\_\_\_\_ %  
(estimated from graph)

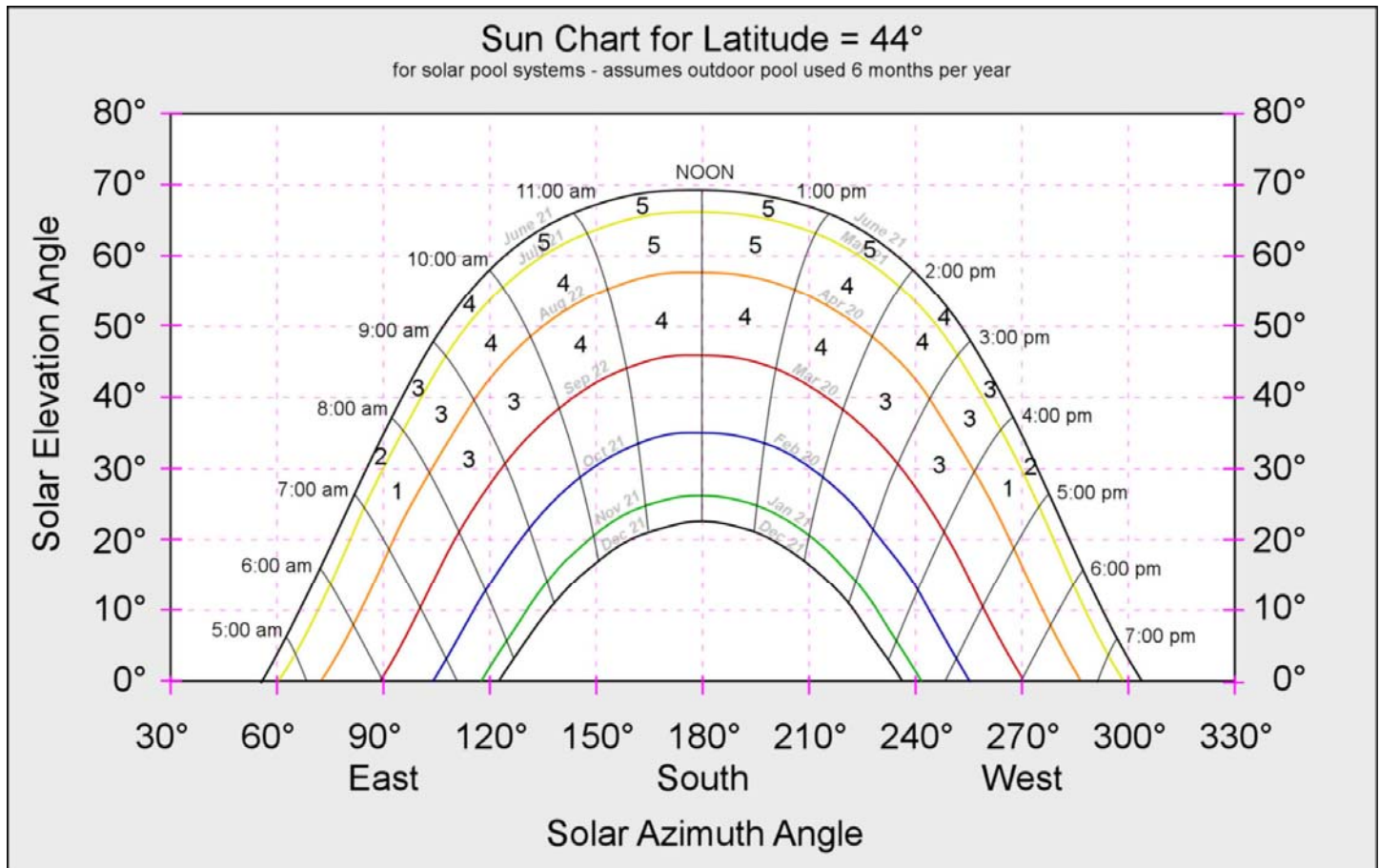




# Sun Chart

For solar pool water heating systems

**Step 1** – From the midpoint of the solar array, draw the skyline on the graph below. Use the elevation angles and solar azimuth angles to determine the location of the obstructions. Draw deciduous trees with a dotted outline and fill with light shading. Year-round (solid) obstructions like buildings, or conifer trees should be drawn with solid outlines and filled with heavy shading.



**Step 2** – Add up the solar fraction numbers in the sections that have shading. The sum of all these values inside the obstructed areas is the percent of energy lost to external shading. Subtract this number from 100 percent to get the percent not shaded.

Percent Not Shaded = 100% - sum of obstructed areas = \_\_\_\_\_%

**Step 3** – Calculate the Total Solar Resource Fraction using the following equation:

Total Solar Resource Fraction = TOF x Percent Not Shaded = \_\_\_\_\_%