

**As-Is Energy Rating Reimbursement Form
(HER-1 Invoice)**

This form must be current and fully completed and signed by the homeowner and the energy rater. Please read the instructions on the following page. Incomplete forms may delay processing. The social security number is required for tax purposes. Reimbursements and rebates are subject to funding availability. Homeowner information, except for social security information provided in this form may be considered public information and, therefore, subject to public records disclosures.

The homeowner must send the completed form with all required documents to **AHFC, P.O. Box 101020, Anchorage, AK 99510-1020; Attn: R2D2** to participate in the Home Energy Rebate program.

Homeowner Information

please check this box if you have previously participated.

1. Homeowner Legal Name _____
2. Homeowner Social Security# _____(required, or will not be processed)
3. Property Address/Legal Desc. _____
4. Mailing Address _____
5. City _____
6. State & Zip Code _____
7. Phone Number _____
8. E-mail Address _____
9. Reimbursement Amount \$ _____(Not to Exceed \$325)

Certifying statement: I **certify** that this is my primary residence; I am the owner of and occupy the above-referenced property year-round. I also acknowledge and understand that reimbursements and rebates under the Home Energy Rebate program are deemed taxable and need to be reported on my federal tax return. AHFC will issue an IRS Form 1099 for any reimbursement or rebate amount received. I understand and agree that if I submit any false, inaccurate or incomplete information in this form and attachments, I will be subject to the following: (1) immediate repayment to AHFC of any amount paid to me by AHFC; and (2) possible prosecution for fraud and misrepresentation. Attached are the **required** copies of my:

1. Home Energy Rating certificate (As-Is),
2. Energy Efficiency Improvement Options report (As-Is),
3. Proof of ownership (tax parcel notice, transfer deed or deed of trust, that matches property address),
4. Energy rater's receipt or cleared check copy.

I also certify that I have 90 days from the date I am dispatched to get an as-is energy rating, and to submit all of the above listed paperwork to AHFC. I understand that improvements to my home must meet all applicable building codes and standards and may require ventilation.

Homeowner's Signature Date

Energy Rater Information

1. Energy Rater _____
2. Address _____
3. City _____
4. State & Zip Code _____

I **certify** that the information contained in the energy rating on the above-referenced property is true and correct. I have provided the owner of the property with a copy of the As-Is Energy Rating, the As-Is Improvement Options report, consumer education on energy efficiency, and my receipt for the energy rating. I understand that any misrepresentation is subject to penalties detailed in 15 AAC 155.350.

Energy Rater's Signature Date HER-1 7/11/13



AS-IS ENERGY RATING REIMBURSEMENT INSTRUCTIONS (HER-1 Invoice)

PLEASE READ THESE INSTRUCTIONS AND THE PROGRAM GUIDELINES CAREFULLY. Incomplete forms and documents may result in the reimbursement and/or rebate being delayed or denied. **Maximum As-Is rating reimbursement may not exceed \$325.00 and is limited to one rebate per dwelling.** The program is subject to funding availability. Dwellings which have participated, or are participating in the Weatherization or New Home Rebate program are ineligible to participate in the Home Energy Rebate program. ***Please check the box on the front page of this application if you have previously participated.*** The program guidelines may be found at <http://www.ahfc.us/efficiency/energy-programs/home-energy-rebate/>.

NAME/SOCIAL SECURITY NUMBER: Enter the name and social security number of the homeowner signing the certifying statement and applying for the reimbursement, as it appears on your current or most recent Federal Tax return. Enter only one name and one social security number. The social security number is required as the payments will be reported to the IRS, and a 1099 will be issued by AHFC. Many energy incentives are referred to as “rebates” even though they do not constitute rebates for federal tax purposes. Energy subsidies designed to conserve energy are deemed taxable income and need to be reported on your federal tax return.

- 1. PROPERTY AND MAILING ADDRESS:** The property address line is for the street address or the legal description (lot, block, and subdivision) of the property being rated and should correspond to the proof of ownership. The mailing address is where the reimbursement, rebate check and 1099 will be mailed. If you move prior to issuance of the 1099, please provide AHFC with an updated mailing address.
- 2. PROOF OF OWNERSHIP:** The energy rating reimbursement is available only for an owner-occupied dwelling used as a primary, year-round residence. The homeowner must attach proof of ownership in the form of a tax parcel notice (tax assessment) from the local city or borough government, or a copy of a transfer deed, or a copy of a deed of trust, which matches the homeowner name and address on the energy rating certificate.
- 3. PHONE NUMBERS:** Enter the numbers where the homeowner can be reached between the hours of 8:00 a.m. and 5:00 p.m. if we have questions while processing the reimbursement.
- 4. NOTICE REGARDING PERSONAL INFORMATION:** Most of your communications with the Alaska Housing Finance Corporation are considered part of the public record and may be subject to disclosure under AS 40.25.110 -40.25.120. Personal information obtained through the Home Energy Rebate Program is governed by AS 40.25.300 – AS 40.25.350. It requires notice when collecting personal information that may become part of the public record.
- 5. 90 DAYS FROM DISPATCH TO SUBMIT PAPERWORK:** You have 90 days from the date your name is dispatched to an energy rater to submit your paperwork to AHFC. Failure to submit your paperwork within 90 days may result in participant ineligibility. To become eligible, you must submit this completed form. **Please note: signing up again on the waitlist does not constitute applying to the program. Funds are only set aside and eligibility is determined when AHFC receives your HER-1 Invoice and paperwork.**
- 6. CERTIFYING STATEMENT:** The homeowner must sign and date the certifying statement on the application in order for this form to be processed. The person signing the reimbursement and rebate forms should be the owner whose name appears on the tax parcel notice, transfer deed, or deed of trust and energy rating certificate. This certification is required to prevent fraud.
- 7. REQUIRED DOCUMENTS:** Provide all information and documents listed on the form. Homeowners submitting incomplete forms and documents will be notified by email, telephone, or certified mail. If missing items are not provided within 30 days, the form and documents will be returned to the homeowner. The homeowner will then need to re-submit the completed forms and required documents.
- 8. TIMELINE:** The homeowner has 18 months from the date of the first (As-Is) energy rating to complete the entire process: energy-efficiency improvements, get the final (Post-Improvement) energy rating, and submit the completed forms and required documents to claim the rebate. AHFC has 60 business days to process the completed applications. **The homeowner is responsible for ensuring AHFC has all the required documentation.**