

**Post-Improvement Rating Reimbursement & Rebate Form
(HER-2 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 will delay processing. 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.

Homeowner Information

1. Homeowner Legal Name _____
2. Property Address/Legal Desc. _____
3. Mailing Address _____
4. City _____
5. State & Zip Code _____
6. Phone Numbers _____
7. E-mail Address _____

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 further certify that the attached copies of the required documentation support my reimbursement and rebate request. 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 (Post-Improvement),
2. Receipts with Proof of Payment for eligible improvements completed,
3. Energy rater's receipt or cleared check copy for Post-Improvement energy rating.

Total of receipts for improvements: \$ _____
 Reimbursement for Post-Improvement energy rating: \$ _____ (not to exceed 175.00)

I understand AHFC will determine the actual rebate and reimbursement amount, based on points, steps improved and eligible receipts **and** proofs of payment.

 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 Post-Improvement energy rating and my receipt for this energy rating. I understand that any misrepresentation is subject to penalties detailed in 15 AAC 155.350

 Energy Rater's Signature Date

HER-2 7/11/13



POST-IMPROVEMENT ENERGY RATING REIMBURSEMENT AND REBATE INSTRUCTIONS (HER-2 Invoice)

PLEASE READ THESE INSTRUCTIONS AND PROGRAM GUIDELINES CAREFULLY. Incomplete forms and documents may result in the reimbursement and/or rebate being delayed or denied. Only one Post-Improvement rating reimbursement and rebate is allowed per dwelling. **Maximum rating reimbursement may not exceed \$175.00. Maximum rebate may not exceed \$10,000 as determined by AHFC.** AHFC determines the actual rebate and reimbursement amount, based on points, steps improved and eligible receipts and proof of payment (see Energy Rebate Guidelines for details). The program is subject to funding availability and any amount received is deemed taxable by the IRS. Dwellings which have participated, or are participating, in the Weatherization program or New Home Rebate program are not eligible for the Home Energy Rebate program for existing homes.

- 1. NAME/SOCIAL SECURITY NUMBER:** Enter the name of the homeowner signing the certifying statement and applying for the reimbursement and rebate as it appears on your current or most recent Federal Tax return. Enter only one name and social security number. The name should match the social security number previously given on the As-Is Energy Rating Reimbursement invoice (HER-1). 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.
- 2. 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.
- 3. PROOF OF OWNERSHIP:** This energy rating reimbursement and rebate is available only for an owner-occupied dwelling used as year-round residence. The homeowner must have provided a copy of proof of ownership with their previously submitted As-Is Energy Rating Reimbursement Invoice, in the form of a tax parcel notice (tax assessment) from the local city or borough government, or a transfer deed, or a deed of trust, which matches the homeowner name and address on the energy rating certificate.
- 4. PHONE NUMBER:** 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 and rebate.
- 5. 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.
- 6. CERTIFYING STATEMENT:** The homeowner must sign and date the certifying statement on the application in order for this reimbursement and rebate 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 submitted previously with the As-Is Energy Rating Reimbursement invoice (HER-1). 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 may be returned to the homeowner. The homeowner will need to re-submit the completed forms and required documents. PLEASE NOTE: If you received a revised As-Is rating or Improvement Options Report from your energy rater since your initial submittal, please include a copy of the revised report with this form.
- 8. TIMELINE:** The homeowner has 18 months from the date of the first (As-Is) energy rating to complete the energy-efficiency improvements, get the final (Post-Improvement) energy rating, and submit this completed form and required documents to claim the rebate. AHFC has 60 business days to process the completed application. **The homeowner is responsible for ensuring AHFC has all the required forms and documents.**