

STATE OF CONNECTICUT – OFFICE OF POLICY AND MANAGEMENT  
**FURNACE REPLACEMENT REBATE PROGRAM**  
**JULY 1, 2007 – APRIL 15, 2009 GUIDELINES**

**GENERAL INFORMATION**

The Furnace Replacement Rebate Program is an incentive program for Connecticut households to replace their existing residential furnaces or boilers with more energy efficient models. The program is designed to provide rebates of up to \$500 to households that purchase and install replacement natural gas, propane or oil furnaces and boilers between July 1, 2007 and June 30, 2017. Rebates will be available for replacement natural gas furnaces or boilers that meet or exceed Federal Energy Star standards and propane and oil furnaces and boilers that are at least 84% efficient. The amount of the rebate will decrease as your income rises above a certain level. The Office of Policy and Management, authorized by Connecticut General Statutes Section 16a-46e, is responsible for implementing this Furnace Replacement Rebate Program.

The Furnace Replacement Rebate Program has a retroactive start date of July 1, 2007. Furnaces or boilers purchased and installed prior to that date will not qualify for a rebate.

For each Furnace Replacement Rebate for which you apply, you must:

- 1) File one completed Furnace Replacement Rebate Application and Verification Form;
- 2) Provide furnace/boiler proof of purchase and installation; and,
- 3) File one completed Form W-9.

Failure to provide required information may result in denial of the Rebate.

Furnace Replacement Rebates are not considered taxable income for purposes of Connecticut State Income Tax. However, Furnace Replacement Rebates may be considered taxable income for Federal Income Tax purposes and subject to Federal Income Tax. Please consult your tax advisor for your specific situation.

Please be sure to fill in your Name and Social Security Number on both pages of the Furnace Rebate Program Application and Verification Form in case the pages get separated.

**APPLICANT SIGNATURE and NOTARIZATION**

Be sure to carefully read and understand each of the statements in the Furnace Replacement Rebate Program Application and Verification Form and the Furnace Replacement Rebate Program Guidelines. After you have filled in and assembled all necessary Rebate documentation, you must have the Furnace Replacement Rebate Program Application and Verification Form notarized. Do not sign and date the form until in the presence of a Commissioner of the Superior Court or Notary Public.

**QUESTIONS**

If you have any questions, please call the Furnace Replacement Rebate Program toll-free: 1-866-940-4676. Or, consult the Furnace Replacement Rebate Program website at <http://www.ct.gov/opm/furnacerebate>. Additional Furnace Replacement Rebate Program application materials can be downloaded at the website as well. Photocopies of the Furnace Replacement Rebate Program Application and Verification Form are acceptable.

**MAILING INSTRUCTIONS**

Mail All Furnace Replacement Rebate Program Application Materials To:

**Office of Policy and Management**  
**Attention: FURNACE REBATE**  
**Energy Policy Unit**  
**450 Capitol Avenue, MS 52ENR**  
**Hartford, CT 06106-1379**

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**ELIGIBILITY**

Eligibility for the Rebate for furnaces/boilers installed between July 1, 2007 and April 15, 2009 will be based on 2007 Federal and State Income Tax Filing Information.

Eligibility is also based on:

REPLACEMENT FURNACE / BOILER EFFICIENCY

- The replacement **natural gas** furnace/boiler must **meet or exceed federal Energy Star standards**.
- The replacement **propane** and **oil** furnace/boiler must **be not less than 84% efficient**.
- **AFUE** stands for Annual Fuel Utilization Efficiency. A furnace's or boiler's efficiency rating is measured by AFUE. The Federal Trade Commission requires new furnaces or boilers to display their AFUE so consumers can compare heating efficiencies of various models. Higher AFUE numbers are more efficient. For more information about furnace/boiler efficiency, visit the Energy Star websites:
  - for furnaces: [http://www.energystar.gov/index.cfm?c=furnaces.pr\\_furnaces](http://www.energystar.gov/index.cfm?c=furnaces.pr_furnaces); and,
  - for boilers: [http://www.energystar.gov/index.cfm?c=boilers.pr\\_boilers](http://www.energystar.gov/index.cfm?c=boilers.pr_boilers).
- Only natural gas, oil and propane furnaces/boilers qualify for the Rebate.
- The Rebate is valid only for purchased equipment. Leased equipment will not qualify for a Rebate.
- The Rebate is valid for a replacement furnace/boiler financed via a Federal and/or State low interest loan program(s). However, a replacement furnace/boiler paid for with a monetary grant under a Federal and/or State grant program (for example, a replacement furnace program administered by the Fuel Oil Conservation Board) is not eligible for a Rebate.
- You must provide furnace/boiler **proof of purchase and installation** (for example, a dated invoice).
- The Rebate cannot exceed the total cost for the replacement furnace/boiler.

APPLICANT INCOME

- The Rebate Applicant must have filed a 2007 Federal Income Tax Return and meet Connecticut Adjusted Gross Income (CT AGI) levels. **However, if you did not file a 2007 Federal Income Tax Return because your income did not meet the Federal Income Tax filing requirements, you are eligible for the maximum allowable rebate amount of \$500** (assuming you meet all other eligibility criteria).
- Your CT AGI can be found on Line 5 of the 2007 Form CT-1040 Resident Income Tax Return; Line 3 of the 2007 Form CT-1040EZ Resident EZ Income Tax Return; and Line 5 of the 2007 Form CT-1040NR/PY Nonresident and Part-Year Resident Income Tax Return.
- **The attached Income Eligibility Reference Charts can be used to determine the rebate amount you are eligible for based on your federal filing status and CT AGI.**
- Upon receipt of your completed Furnace Replacement Rebate Program Application and Verification Form, **the Office of Policy and Management will verify your eligibility and determine your rebate amount.**
- Any reference in the Furnace Replacement Rebate Program Application and Verification Form, as well as these Guidelines, to a spouse also refers to a party to a civil union recognized under Connecticut law.

RESIDENTIAL STRUCTURE

- The Rebate is only available for furnace/boiler replacement in an existing residential structure containing not more than 4 dwelling units.
- The Rebate is not available for new construction/installation.

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**INCOME ELIGIBILITY REFERENCE CHARTS\***

**Filing Status 2007: Unmarried**

<u>CT Adjusted Gross Income</u>	<u>Rebate</u>
up to \$55,500	\$500
\$55,501-\$65,500	\$450
\$65,501-\$75,500	\$400
\$75,501-\$85,500	\$350
\$85,501-\$95,500	\$300
\$95,501-\$105,500	\$250
\$105,501-\$115,500	\$200
\$115,501-\$125,500	\$150
\$125,501-\$135,500	\$100
\$135,501-\$145,500	\$50
\$145,501 and over	\$0

**Filing Status 2008: Unmarried**

<u>CT Adjusted Gross Income</u>	<u>Rebate</u>
up to \$56,500	\$500
\$56,501-\$66,500	\$450
\$66,501-\$76,500	\$400
\$76,501-\$86,500	\$350
\$86,501-\$96,500	\$300
\$96,501-\$106,500	\$250
\$106,501-\$116,500	\$200
\$116,501-\$126,500	\$150
\$126,501-\$136,500	\$100
\$136,501-\$146,500	\$50
\$146,501 and over	\$0

**Filing Status: Married, Filing Separately**

<u>CT Adjusted Gross Income</u>	<u>Rebate</u>
up to \$50,250	\$500
\$50,251-\$55,250	\$450
\$55,251-\$60,250	\$400
\$60,251-\$65,250	\$350
\$65,251-\$70,250	\$300
\$70,251-\$75,250	\$250
\$75,251-\$80,250	\$200
\$80,251-\$85,250	\$150
\$85,251-\$90,250	\$100
\$90,251-\$95,250	\$50
\$95,251 and over	\$0

**Filing Status: Head of Household**

<u>CT Adjusted Gross Income</u>	<u>Rebate</u>
up to \$78,500	\$500
\$78,501-\$88,500	\$450
\$88,501-\$98,500	\$400
\$98,501-\$108,500	\$350
\$108,501-\$118,500	\$300
\$118,501-\$128,500	\$250
\$128,501-\$138,500	\$200
\$138,501-\$148,500	\$150
\$148,501-\$158,500	\$100
\$158,501-\$168,500	\$50
\$168,501 and over	\$0

**Filing Status: Married, Filing Jointly**

<u>CT Adjusted Gross Income</u>	<u>Rebate</u>
up to \$100,500	\$500
\$100,501-\$110,500	\$450
\$110,501-\$120,500	\$400
\$120,501-\$130,500	\$350
\$130,501-\$140,500	\$300
\$140,501-\$150,500	\$250
\$150,501-\$160,500	\$200
\$160,501-\$170,500	\$150
\$170,501-\$180,500	\$100
\$180,501-\$190,500	\$50
\$190,501 and over	\$0

- Upon receipt of your completed Furnace Replacement Rebate Program Application and Verification Form, the Office of Policy and Management will verify your eligibility and determine your rebate amount.
- Eligibility for the Rebate for furnaces/boilers installed between July 1, 2007 and April 15, 2009 will be based on 2007 Federal and Connecticut State Income Tax Filing Information.

\* Valid thru April 15, 2009

FOR OFFICE USE ONLY

STATE OF CONNECTICUT - OFFICE OF POLICY AND MANAGEMENT  
**FURNACE REPLACEMENT REBATE PROGRAM**  
**APPLICATION AND VERIFICATION FORM**  
**JULY 1, 2007 – APRIL 15, 2009**

FOR OFFICE USE ONLY

Application No.:

 Approved  Denied

Reviewer Initials:

Date Rebate Issued:

Rebate Amount:

PLEASE PRINT OR TYPE

**APPLICANT INFORMATION**

Name (Last, First, Middle Initial):

Social Security Number:

<input type="text"/>	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Mailing Address:

City:

State:

Zip Code:

Phone Number:

Date of Birth (Month, Date, Year):

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Street Address Where Furnace/Boiler Was Replaced (if different from mailing address):

City:

State: CT

Zip Code:

If Different Than Mailing Address, Please Explain:

What is the type of residential structure where the furnace/boiler was replaced? (check only one)

 Single-family      Multi-family, # of units: \_\_\_\_\_      Apartment/Condo, # of units: \_\_\_\_\_
Did you file a Federal Income Tax Return for 2007?  YES  NO

What was your Federal Filing Status for 2007? (check only one)

 Unmarried Individual      Married Filing Separately      Head of Household      Married Filing Jointly
If you were **not required to file a Federal Income Tax Return** for 2007 because your income did not meet the Federal Income Tax filing requirements, check the following box: Did you file a Connecticut State Income Tax Return for 2007?  YES  NOWhat was your Connecticut Adjusted Gross Income (CT AGI) for 2007? \$ ,,If you were **not required to file a Connecticut State Income Tax Return** for 2007 because your income did not meet Connecticut State Income Tax filing requirements, check the following box: **FURNACE / BOILER INFORMATION****NEW SYSTEM INFORMATION** Furnace  Boiler (check only one) Natural Gas  Propane  Oil (check only one)

Brand Name:

Model Name:

Model Number:

AFUE:

Installation Date:

**OLD SYSTEM INFORMATION\*** Furnace  Boiler (check only one) Natural Gas  Propane  Oil (check only one) Other, please specify: \_\_\_\_\_Approximate Age:  0 - 5 years  5 - 10 years(check only one)  10 - 20 years  over 20 years

AFUE: (if known)

*\*please share if available*

**APPLICANT INFORMATION**

Name (Last, First, Middle Initial): \_\_\_\_\_ Social Security Number: 

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**FURNACE / BOILER INSTALLER INFORMATION**

Installer Name: \_\_\_\_\_  
Installer License No.: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Installer Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Was the replacement furnace/boiler self-installed?  Yes  No  
If Yes, did the replacement furnace/boiler pass the municipal self-installation inspection?  Yes  No

**DECLARATIONS AND INSTALLATION VERIFICATION**

I understand that the Connecticut Office of Policy and Management (OPM) does not make any warranty concerning the performance, operation, installation or any other characteristic or feature of the replacement furnace or boiler. OPM is not responsible for the furnace or boiler warranties or guarantees, expressed or implied.

I understand that OPM approval is only for purposes of obtaining the Furnace Replacement Rebate Program rebate.

I certify that the furnace or boiler system described in this application was purchased on, or after, July 1, 2007 and is installed.

I certify that the furnace or boiler system described in this application was not paid in full with a monetary grant under a Federal and/or State grant program.

I understand that this Furnace Replacement Rebate cannot exceed the total cost for the replacement furnace or boiler described in this application.

I understand that OPM may be required to disclose the name, address and phone number from this application under the Connecticut Freedom of Information Act (Connecticut General Statutes, Chapter 14, Section 1-210).

I understand that this Furnace Replacement Rebate may be subject to Federal Income tax.

I authorize OPM to use information provided on this application to confirm my furnace replacement rebate eligibility by verifying, with the municipality where the replacement furnace or boiler described in this application was replaced, that the replacement furnace or boiler, if self-installed, passed the municipal self-installation inspection.

I authorize OPM to use information provided on this application, including my Social Security Number, to confirm my furnace rebate eligibility by verifying my filing status, income level and income year with the Connecticut Department of Revenue Services.

By signing below, I certify that all the information described in this Furnace Replacement Rebate Program Application and Verification Form and all the documents provided with this Furnace Replacement Rebate Program Application and Verification Form are accurate and true and that I have read and understand the Furnace Replacement Rebate Program Guidelines.

**APPLICANT SIGNATURE and NOTARIZATION**

*(DO NOT sign and date this form until in the presence of a Commissioner of the Superior Court or Notary Public.)*

Sworn as true to the best of my knowledge and belief, subject to the penalties of false statement.

**Signature of Applicant:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Printed Name of Applicant: \_\_\_\_\_

Sworn and subscribed before me on this \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_\_. *(NOTARY SEAL)*

**Signature of Commissioner of the Superior Court or Notary Public:** \_\_\_\_\_

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**FURNACE REPLACEMENT REBATE PROGRAM CHECKLIST**

Please make sure that you:

- Complete and sign the **Form W-9**;
- Complete and sign the **Furnace Replacement Rebate Program Application and Verification Form** in its entirety;
  - On your Furnace Replacement Rebate Program Form, be sure to indicate:
    - Type of **residential structure** where the furnace/boiler was replaced;
    - Whether you filed a **2007 Federal Income Tax Return**;
    - Your **2007 Federal Filing Status**;
    - Your **2007 CT AGI**;
    - Whether your new system is a **furnace** or **boiler**;
    - Whether your new system uses **natural gas, propane** or **oil**;
    - AFUE** of your new system; and,
    - Installation date** of your new system.
- Notarize** the Furnace Replacement Rebate Application and Verification Form;
- Submit copies of a dated **invoice** or **proof of purchase and installation** of qualified furnace/boiler.
- Keep a copy** of all Furnace Replacement Rebate Program application materials for your records.