

RESIDENTIAL HEAT PUMP Rebate Claim Form



for customers who will use heat pumps as their primary heating system

Homeowner Name:	Street Address:
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All rows must be **either checked or initialed**. (Note: "Heat pump(s)" refers only to heat pumps for which rebates are being requested. Non-rebate-eligible heat pumps can be used to meet sizing requirements.)

Homeowner Requirements

1	Heat pump(s) will be used as primary heating system throughout the heating season (must be initialed by homeowner)	_____ <small>Homeowner Initials</small>
2	Homeowner will only use furnace or boiler (if any) for emergency backup	
3	Homeowner supplied with a copy of Efficiency Maine Heat Pump User Tips	
4	Homeowner understands electric bill will increase, but overall energy costs could decrease if heat pump is used optimally	
5	Housing unit did not have natural gas utility account before upgrade	

Check when applicable

6	W-9 attached if the home is owned by a business and the business is the rebate recipient (one-time requirement)	
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Additional Requirements for Low- and Moderate-Income Customers

1	Housing unit is owner's principal residence	
2	Customer eligibility prior to claim submission (check one): Low Income - Customer participates in MaineCare, TANF, SNAP, or HEAP Moderate Income - Customer has Adjusted Gross Income of up to \$70,000 for single filers or \$100,000 for joint filers <i>Note: If customer is not verified prior to claim submission, the claim may not qualify for a low- or moderate-income rebate, or it may be delayed</i>	

Registered Vendor Requirements

1	Customer was informed that rebate eligibility requires heat pump(s) to be used as primary heating system													
2	Heat pump(s) installed and configured to be the primary heating system throughout the heating season													
3	Homeowner was shown how to turn the heat pump on and off, clean the filter, switch between heating and cooling modes, change the temperature setpoint, adjust airflow direction, and knows who to call for service													
4	Primary, fossil fuel, space-heating system, if any, reserved for emergency backup by: <ul style="list-style-type: none"> Turning all thermostats off or all the way down to the lowest possible temperature setting, or Turning off and covering power switch, or Connecting system only to a generator 													
5	Heat pumps selected based on the following criteria: <table border="1" style="width:100%; margin-top: 10px; border-collapse: collapse;"> <thead> <tr> <th style="width:60%;"></th> <th style="width:15%; text-align: center;">Rebate Eligible</th> <th style="width:25%; text-align: center;">Design temperature heating capacity can be counted toward total heating capacity of all heat pumps.</th> </tr> </thead> <tbody> <tr> <td>SINGLE-ZONE heat pumps on Efficiency Maine list</td> <td style="text-align: center;">YES</td> <td style="text-align: center;">YES</td> </tr> <tr> <td>MULTI-ZONE heat pumps</td> <td style="text-align: center;">NO</td> <td style="text-align: center;">YES</td> </tr> <tr> <td>DUAL FUEL heat pump / fossil fuel furnace</td> <td style="text-align: center;">NO</td> <td style="text-align: center;">NO</td> </tr> </tbody> </table>		Rebate Eligible	Design temperature heating capacity can be counted toward total heating capacity of all heat pumps.	SINGLE-ZONE heat pumps on Efficiency Maine list	YES	YES	MULTI-ZONE heat pumps	NO	YES	DUAL FUEL heat pump / fossil fuel furnace	NO	NO	
	Rebate Eligible	Design temperature heating capacity can be counted toward total heating capacity of all heat pumps.												
SINGLE-ZONE heat pumps on Efficiency Maine list	YES	YES												
MULTI-ZONE heat pumps	NO	YES												
DUAL FUEL heat pump / fossil fuel furnace	NO	NO												
6	New and previously installed heat pump(s) sized for at least 80% of home's peak heating load and Sizing Worksheet (page 2) attached													
7	Heat pumps, combined with supplemental heat, sized for at least 100% of home's peak heating load. Primary fossil-fuel heating systems can be used for emergency backup, but their heating capacity cannot be counted toward the 100% requirement.													
8	Heat pump(s) installed by an Efficiency Maine heat pump Residential Registered Vendor													
9	Registered Vendor assessed risk of frozen pipes and, if warranted, explained to homeowner that risk can be minimized with insulation, heat tape on at-risk pipes, or space heaters set to keep the temperature just above freezing.													
10	Heat pump(s) installed in a Maine: (check one) single-family house, OR two-unit duplex, OR condominium (number of units in building: _____), OR mobile home, OR mixed-use building with one or two housing units and no commercial electrical meter(s)													
11	Heat pump(s) installed in accordance with Efficiency Maine's Heat Pump Installation Requirements Checklist													
12	Rebate claim form emailed or postmarked within 6 months of project completion													
13	Document(s) showing customer contact information and total project cost attached													

NOTE: Program subject to change without notice

Please submit by email: hesp@efficiencymaine.com OR Mail: PO Box 219, Brunswick, ME 04011-0219.
 Please allow 6 weeks for rebate processing.
efficiencymaine.com • 866-376-2463

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SIZING WORKSHEET (REQUIRED)

Heat Load Estimate	
Design Temperatures (check one)	
1	Portland: 0°F DB (source: ASHRAE 99.6%)
2	Bangor: -7°F DB (source: ASHRAE 99.6%)
3	Caribou: -14°F DB (source: ASHRAE 99.6%)
4	Other. Enter temperature: _____ (must be 0°F DB or below)
Method (check one)	
1	Approved software <i>Ideal for super-insulated or poorly insulated homes with no heating fuel use history.</i>
2	Efficiency Maine Heat Load Estimator <i>Most accurate option when past fuel bills are available. Doesn't work for homes heated with heat pumps or any other type of electric heat.</i>
3	Square footage method: >/=20 Btu/hour/square foot of any area that: • is currently served by any heating system (existing homes), OR • will be heated (new construction) <i>Suitable for homes with typical insulation and air sealing.</i>
	Enter square footage: _____
Estimated Heat Load at Design Temperature (Btu/hour)	
Enter heat load:	_____

Heat Pump Heating Capacities					
1. The heating capacity at design temperature of all heat pumps (single-zone, multi-zone, new, existing, rebate-eligible, and rebate-ineligible) can count towards the minimum 80% of peak load.					
2. Only dry bulb temperature capacities are acceptable.					
#	Claiming Rebate? (Y/N)	Manufacturer	Outdoor Unit Model Number	Indoor Unit Model Number*	Manufacturer-claimed Max Heating Capacity at or Below Design Temperature (Btu/hour/heat pump)
1					
2					
3					
4					
5					
TOTAL Heating Capacity of Heat Pumps:					
Total Heating Capacity of Heat Pumps as % of Estimated Heat Load (MINIMUM 80%)**					%

* Please include air mover model numbers for ducted systems.

** If less than 100%, then complete Supplemental Heating table below.

Supplemental Heating	
If Total Heating Capacity of Heat Pumps as % of Estimated Heat Load is less than 100%, note the heating system(s) that will provide the balance.	
1	Wood or pellet stove
2	Electric resistance (e.g., baseboards or space heaters)
3	Fossil-fuel wall furnace or stove (oil, propane, or kerosene)
4	Other: _____

NOTE: Primary fossil-fuel heating systems can be used for emergency backup, but their heating capacity cannot be counted towards the 100% requirement.

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Homeowner Name:							
Installation Address:	Address		Town		State	ME	Zip
Mailing Address:	Address		Town		State		Zip
Homeowner Email Address:							
Homeowner Phone Number:							
Pre-upgrade Primary Heating Fuel:	N/A (new construction) Electric Baseboard	Oil	Kerosene	Propane	Wood	Heat Pump(s)	

Rebate Calculation		
1	Number of rebate-eligible outdoor units installed as part of this upgrade	
2	Rebate Per Outdoor Unit Low Income = \$3,000 Moderate Income = \$2,000 Any Income = \$1,000	\$
3	Unadjusted Rebate Amount (multiply row 1 by row 2)	\$
4	Lifetime Limit (per housing unit)* Low Income lifetime limit = \$9,000 in heat pump rebates Moderate Income lifetime limit = \$6,000 in heat pump rebates Any Income lifetime limit = \$3,000 in heat pump rebates <i>*A housing unit is defined as having a dedicated kitchen, sleeping area, and bathroom.</i>	\$
5	Previous Heat Pump Rebates Issued for This Housing Unit	\$
6	Remaining Balance of Lifetime Limit (row 4 minus row 5)	\$
7	Requested Rebate Amount (enter row 3 or row 6, whichever is less)	\$
8	Limited Time Offer per housing unit (enter \$500 if upgrade was completed, and rebate claim emailed or postmarked, between 3/1/2026 and 12/31/2026, inclusive)	\$
9	Total (row 7 plus row 8)	\$

Other Rebate Details	
Total Project Cost: Cost of heat pumps (rebated and non-rebated, labor and materials)	\$
Number of heat pumps installed as part of this upgrade: (rebated and non-rebated)	# of Outdoor Units: _____
	# of Indoor Units: _____
Project Completion Date:	_____
Rebate Recipient:	Homeowner Residential Registered Vendor Rebates for low-income customers are sent to the vendor
Residential Registered Vendor Company (and branch if applicable):	_____
Name of Registered Technician:	_____
SIGNATURES. Please sign below to certify that all information on this claim form is correct, all work has been completed, and to commit to help Efficiency Maine conduct an inspection.	
Registered Vendor Signature:	Date: _____
Homeowner Signature:	Date: _____