

RESIDENTIAL HEAT PUMP Rebate Claim Form



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

Homeowner Name: Jane Doe	Street Address: 123 Main St
--------------------------	-----------------------------

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)	JD <small>Homeowner Initials</small>
2	Homeowner will only use furnace or boiler (if any) for emergency backup	<input checked="" type="checkbox"/>
3	Homeowner supplied with a copy of Efficiency Maine Heat Pump User Tips	<input checked="" type="checkbox"/>
4	Homeowner understands electric bill will increase, but overall energy costs could decrease if heat pump is used optimally	<input checked="" type="checkbox"/>
5	Housing unit did not have natural gas utility account before upgrade	<input checked="" type="checkbox"/>

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)	<input type="checkbox"/>
---	---	--------------------------

Additional Requirements for Low- and Moderate-Income Customers

1	Housing unit is owner's principal residence	<input checked="" type="checkbox"/>
2	<p>Customer eligibility prior to claim submission (check one):</p> <p><input type="checkbox"/> Low Income - Customer participates in MaineCare, TANF, SNAP, or HEAP</p> <p><input checked="" type="checkbox"/> Moderate Income - Customer has Adjusted Gross Income of up to \$70,000 for single filers or \$100,000 for joint filers</p> <p><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></p>	

Registered Vendor Requirements

1	Customer was informed that rebate eligibility requires heat pump(s) to be used as primary heating system	<input checked="" type="checkbox"/>												
2	Heat pump(s) installed and configured to be the primary heating system throughout the heating season	<input checked="" type="checkbox"/>												
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	<input checked="" type="checkbox"/>												
4	<p>Primary, fossil fuel, space-heating system, if any, reserved for emergency backup by:</p> <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 	<input checked="" type="checkbox"/>												
5	<p>Heat pumps selected based on the following criteria:</p> <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:60%;"></th> <th style="width:20%; text-align: center;">Rebate Eligible</th> <th style="width:20%; 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	<input checked="" type="checkbox"/>
	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	<input checked="" type="checkbox"/>												
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.	<input checked="" type="checkbox"/>												
8	Heat pump(s) installed by an Efficiency Maine heat pump Residential Registered Vendor	<input checked="" type="checkbox"/>												
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.	<input checked="" type="checkbox"/>												
10	<p>Heat pump(s) installed in a Maine: (check one)</p> <p><input type="checkbox"/> single-family house, OR</p> <p><input type="checkbox"/> two-unit duplex, OR</p> <p><input checked="" type="checkbox"/> condominium (number of units in building: <u>5</u>), OR</p> <p><input type="checkbox"/> mobile home, OR</p> <p><input type="checkbox"/> mixed-use building with one or two housing units and no commercial electrical meter(s)</p>													
11	Heat pump(s) installed in accordance with Efficiency Maine's Heat Pump Installation Requirements Checklist	<input checked="" type="checkbox"/>												
12	Rebate claim form emailed or postmarked within 6 months of project completion	<input checked="" type="checkbox"/>												
13	Document(s) showing customer contact information and total project cost attached	<input checked="" type="checkbox"/>												

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

RESIDENTIAL HEAT PUMP Rebate Claim Form



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

Homeowner Name: Jane Doe	Street Address: 123 Main St
--------------------------	-----------------------------

SIZING WORKSHEET (REQUIRED)

Heat Load Estimate		
Design Temperatures (check one)		
<input type="checkbox"/>	1	Portland: 0°F DB (source: ASHRAE 99.6%)
<input checked="" type="checkbox"/>	2	Bangor: -7°F DB (source: ASHRAE 99.6%)
<input type="checkbox"/>	3	Caribou: -14°F DB (source: ASHRAE 99.6%)
<input type="checkbox"/>	4	Other. Enter temperature: _____ (must be 0°F DB or below)
Method (check one)		
<input type="checkbox"/>	1	Approved software <i>Ideal for super-insulated or poorly insulated homes with no heating fuel use history.</i>
<input type="checkbox"/>	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>
<input checked="" type="checkbox"/>	3	Square footage method: ≥ 20 Btu/hour/square foot of any area that: <ul style="list-style-type: none"> 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: 2,100
Estimated Heat Load at Design Temperature (Btu/hour)		
Enter heat load:		42,000

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	N	Fujitsu	AOUG15LZAS1	ASUG15LZBS	18,140
2	N	Fujitsu	AOUG09LZAS1	ASUG09LZBS	13,420
3	Y	Mitsubishi	MUZ-FS09NA	MSZ-FS09NA	9,200
4					
5					
TOTAL Heating Capacity of Heat Pumps:					40,760
Total Heating Capacity of Heat Pumps as % of Estimated Heat Load (MINIMUM 80%)**					97%

* 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.		
<input checked="" type="checkbox"/>	1	Wood or pellet stove
<input type="checkbox"/>	2	Electric resistance (e.g., baseboards or space heaters)
<input type="checkbox"/>	3	Fossil-fuel wall furnace or stove (oil, propane, or kerosene)
<input type="checkbox"/>	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.

RESIDENTIAL HEAT PUMP Rebate Claim Form

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



Homeowner Name:	Jane Doe						
Installation Address:	Address	123 Main St	Town	Bangor	State	ME	Zip 04401
Mailing Address:	Address	123 Main St	Town	Bangor	State	ME	Zip 04401
Homeowner Email Address:	jdoe@gmail.com						
Homeowner Phone Number:	(207) 111-1111						
Pre-upgrade Primary Heating Fuel:	<input type="checkbox"/> N/A (new construction) <input checked="" type="checkbox"/> Oil <input type="checkbox"/> Kerosene <input type="checkbox"/> Propane <input type="checkbox"/> Wood <input type="checkbox"/> Heat Pump(s) <input type="checkbox"/> Electric Baseboard <input type="checkbox"/> Other						

Rebate Calculation		
1	Number of rebate-eligible outdoor units installed as part of this upgrade	1
2	Rebate Per Outdoor Unit Low Income = \$3,000 Moderate Income = \$2,000 Any Income = \$1,000	\$ 2,000
3	Unadjusted Rebate Amount (multiply row 1 by row 2)	\$ 2,000
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 <small>*A housing unit is defined as having a dedicated kitchen, sleeping area, and bathroom.</small>	\$ 6,000
5	Previous Heat Pump Rebates Issued for This Housing Unit	\$ 1,200
6	Remaining Balance of Lifetime Limit (row 4 minus row 5)	\$ 4,800
7	Requested Rebate Amount (enter row 3 or row 6, whichever is less)	\$ 2,000
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)	\$ 500
9	Total (row 7 plus row 8)	\$ 2,500

Other Rebate Details		
Cost of heat pumps (rebated and non-rebated, labor and materials)	Total Project Cost:	\$ 5,200
Number of heat pumps installed as part of this upgrade: (rebated and non-rebated)	# of Outdoor Units:	1
	# of Indoor Units:	1
Project Completion Date:	03/06/2026	
Rebate Recipient:	<input type="checkbox"/> Homeowner <input checked="" type="checkbox"/> Residential Registered Vendor Rebates for low-income customers are sent to the vendor	
Residential Registered Vendor Company (and branch if applicable):	Heat Pumps, Etc.	
Name of Registered Technician:	John Smith	
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:	John Smith	Date: 03/06/2026
Homeowner Signature:	Jane Doe	Date: 03/06/2026