

# RESIDENTIAL WHOLE-HOME HEAT PUMP

## Rebate Claim Form



### Homeowner Requirements Checklist

All rows must be checked. (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.)

1	Heat pump(s) will be used to heat the home throughout the heating season
2	Homeowner supplied with a copy of Efficiency Maine <b>Heat Pump User Tips</b>
3	Homeowner taught 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 call for service
4	Homeowner understands electric bill will increase, but overall energy costs could decrease if heat pump is used optimally
5	If there is risk of frozen pipes, homeowner understands it can be minimized with insulation, heat tape on at-risk pipes, or space heaters set to keep the temperature just above freezing.

### Check when applicable:

6	W-9 attached if the home is owned by a business and the business is the rebate recipient
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### Additional Requirements for Low- and Moderate-Income Customers

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

### Registered Vendor Requirements Checklist

1	Primary, fossil-fuel, space-heating system, if any, connected only to a generator or turned off with power switch covered. For homes with domestic hot water heated by a central boiler, all room thermostats must be covered and either turned off or all the way down.
2	Heat pump(s) installed on or after 9/18/2023
3	Heat pump indoor unit, outdoor unit (and air mover for ducted systems) combination is <b>25C federal tax credit-eligible</b> (see "Air-Source Heat Pumps - North")
4	New and previously installed heat pump(s) sized for at least 80% of home's peak heating load and Sizing Worksheet (page 2) attached
5	Heat pump(s), combined with supplemental heat, sized for at least 100% of home's peak heating load
6	Heat pump(s) installed by an Efficiency Maine heat pump <b>Residential Registered Vendor</b>
7	Heat pump(s) installed in a Maine: (check one) single-family, duplex, OR condominium
8	Only the costs of heat pumps with one indoor unit per outdoor unit ("single zone") have been included in the rebate calculation. Both ductless and ducted indoor units are eligible.
9	Heat pump(s) installed in accordance with Efficiency Maine's <b>Heat Pump Installation Requirements Checklist</b>
10	Contractor has explained to the homeowner the maximum capacity of the heat pump at the low-end of its operating range, the expected temperatures for the home's location, and strategies for dealing with extreme temperature events.
11	Rebate claim form emailed or postmarked within 6 months of project completion
12	Invoice(s) attached, showing: • Rebate-eligible costs • Installation address

NOTE: Program subject to change without notice.

Please submit by email: [hesp@efficiencymaine.com](mailto:hesp@efficiencymaine.com) OR Mail: PO Box 219, Brunswick, ME 04011-0219.

Please allow 6 weeks for rebate processing.

[efficiencymaine.com](http://efficiencymaine.com) • 866-376-2463

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### SIZING WORKSHEET (REQUIRED)

Heat Load Estimate	
Design Temperature <i>(check one)</i>	
1	Portland: 0°F (source: ASHRAE 99.6%)
2	Bangor: -7°F (source: ASHRAE 99.6%)
3	Caribou: -14°F (source: ASHRAE 99.6%)
4	Other (Enter temperature: _____ )
Method <i>(check one)</i>	
1	Approved software
2	Efficiency Maine Heat Load Estimator
3	Square footage method: $\geq 20$ Btu/hour/square foot of any area that: <ul style="list-style-type: none"> <li>is currently served by any heating system (existing homes), OR</li> <li>will be heated (new construction)</li> </ul> Enter square footage: _____
Estimated Heat Load at Design Temperature <i>(Btu/hour)</i>	
Enter heat load: _____	

Heat Pump Heating Capacities								
	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)	# of Heat Pumps	Total Heating Capacity at or Below Design Temperature (Btu/hour)	
1								
2								
3								
4								
5								
6								
7								
8								
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 using furnace fans.

# RESIDENTIAL WHOLE-HOME HEAT PUMP Rebate Claim Form



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:	Oil	Kerosene	Propane	Natural Gas	Wood	Electricity	Other	
	N/A (new construction)							

Rebate Calculation		
1	Project Cost Rebate-eligible heat pumps (not previously rebated), and electric panel upgrade	\$
2	Rebate Percentage Low Income = 80% Moderate Income = 60% Any Income = 40%	%
3	Unadjusted Rebate Amount (multiply row 1 by row 2)	\$
4	Lifetime Limit (per housing unit)* Low Income lifetime limit = \$8,000 Moderate Income lifetime limit = \$6,000 Any Income lifetime limit = \$4,000  *A housing unit is defined as having a dedicated kitchen, sleeping area, and bathroom.	\$
5	Previous Heat Pump Rebates Received	\$
6	Remaining Balance of Lifetime Limit (row 4 minus row 5)	\$
7	Requested Rebate Amount (enter row 3 or row 6, whichever is less)	\$

Project Completion Date:	____/____/____		
Rebate Recipient:	Homeowner	Residential Registered Vendor <i>Rebates for low-income customers are sent to the vendor</i>	
Residential Registered Vendor Company (and branch if applicable):			
Name of Registered Technician:			
<b>SIGNATURES.</b> Please sign below to certify that all information on this claim form is correct and to commit to help Efficiency Maine conduct an inspection.			
Registered Vendor Signature:		Date:	____/____/____
Homeowner Signature:		Date:	____/____/____

Please submit by email: [hesp@efficiencymaine.com](mailto:hesp@efficiencymaine.com) OR Mail: PO Box 219, Brunswick, ME 04011-0219.

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