



SAMPLE HVAC AND WATER HEATER INVOICE

123 Street Name
City, State, Zip
Phone: 503.555.1234
Email: yourname@yourmail.com
Website: www.yourbusiness.com

Invoice Date:
Invoice Number:
Due Date:
Invoice Terms:

Participant Name:
Site Address:
City, State, Zip
Date of Install:
Total Energy Trust of Oregon Incentive:

Required Attachments:
 Homeowner invoice marked "paid in full"
 CheckMe! data sheet (if applicable)
 Homeowner invoices submitted with Energy Trust Form 320H or Form 320U

Gas Furnace*/DV Unit Heater/Fireplace/Gas Boiler

Manufacturer:
Serial number:
ECM: Yes No
Installed cost: \$

Model number:
Efficiency percentage (AFUE):
Fireplace efficiency (FE):
Fireplace IPI: Yes No

**Energy Trust recommends high-efficiency gas furnaces that are 90 percent AFUE, or greater. There is no longer an Energy Trust incentive for gas furnaces as of May 1, 2010.*

Ducted Heat Pump

System replaced:
Manufacturer:
Serial number:
HSPF:

Installed cost: \$
Model number:
Unit size (in tons):
SEER: EER:

Heat Pump Premium Installation Package required attachments:

- CheckMe! cost (if applicable)*:
**In order to qualify, CheckMe! data sheet must be attached*
 Performance Tested Comfort Systems (PTCS) Duct Sealing Certificate and NW Duct Sealing Form submitted (if applicable) and duct sealing invoice

Water Heater

Manufacturer:
Serial number:
Energy Factor:

Installed cost: \$
Model number:
Capacity (in gallons, or indicate tankless):
Fuel type: Gas Electric

Energy Trust requires all information listed on this form to process incentives. Legible, handwritten invoices are acceptable. **Please make sure that all pertinent forms and paperwork are submitted together.**

Completed invoices and required forms can be submitted in the following ways:

Mail: Existing Homes; Attn: Incentive Processing; P.O. Box 40508, Portland, OR 97240
Fax: 1.866.516.7592; Attn: Incentive Processing
Email: hesforms@energytrust.org

Checklist for HVAC and Water Heater Incentives and Invoice Requirements

Energy Trust's Existing Homes program requires participants applying for incentives to submit a paid installation invoice, which specifies incentive details. All items listed below are required—along with the information on the front of this document—for incentive processing.

- Contractor contact information
 - Installer name
 - Company address
 - Company phone
- Contractor/installer CCB# (not required for Energy Trust trade allies)
- Date of installation (all applications must be received within 90 days of installation date)
- Homeowner invoice marked "paid in full" (billing address must match Form 320H or Form 320U)
- Homeowner contact information
 - Homeowner name
 - Address
 - Phone number
 - Billing address (if different than residential address)
- Completed Form 320H or Form 320U attached
 - Homeowner billing information
 - Specify mailing address for incentive payment
 - Contractor and homeowner signatures agreeing to Terms and Conditions
- CheckMe! data sheet (if applicable)
- Completed PTCS Duct Sealing Certificate and NW Duct Sealing Form submitted (if applicable) and duct sealing invoice
- Installed cost for each qualifying incentive
- Unit identification for each qualifying incentive:
 - Manufacturer
 - Model number
 - Serial number
- System replaced (for ducted heat pumps only)
- Efficiency information for each qualifying incentive:
 - Ducted heat pumps: Pre- and Post-HSPF, SEER, EER, unit size (in tons)
 - Water heaters: Energy Factor, capacity (in gallons or indicate "tankless")
 - Direct-vent gas fireplaces: FE percent
 - Direct-vent gas unit heater: AFUE percent
- Water must be heated by gas or electric from Portland General Electric, Pacific Power, NW Natural or Cascade Natural Gas
- Incentive amount requested—see www.energytrust.org for current incentive amounts

This sample invoice is to be used as a guideline in accordance to the new Existing Homes incentive structure, effective January 1, 2011. A complete list of the incentive changes is available at www.energytrust.org/ta. All invoices must be submitted on your company's letterhead.