



Let's turn the answers on.

California HVAC Required Documents

Equipment and Services	Incentive Application, Invoice & Proof of Payment	AHRI Certificate	Program Worksheet
Central Air Conditioner	✓	✓	
Heat Pump Upgrade and Conversion	✓	✓	
Ductless Heat Pump – Single Head and Multi Head	✓	✓	
Central Air Conditioner Tune-up	✓		✓
Heat Pump Tune-up	✓		✓

Things to Remember

- Incentive applications and required documents must be received within 90 days of purchase, installation or completed service.
- Incentive checks are issued within 45 days of receipt of the completed and approved incentive application.
- Incentive processing will be delayed if incentive application has missing information or if any required documents are incomplete or missing.

Contact Information

- Customer hotline (800) 942-0266
- Contractor hotline (800) 942-0287
- Mail Pacific Power Home Energy Savings program
100 S.W. Main St., Suite 1600
Portland, OR 97204
- Fax (800) 687-6176
- Web www.pacificpower.net/hes
- Customer E-mail HESHVAC@peci.org
- Contractor E-mail HESTradeAlly@peci.org



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Incentive Application

- Completed by customer and contractor.
- Incentive applications are available online or by calling the customer hotline at (800) 942-0266.
- Click on the link below to download the incentive application:
 - [HVAC Incentive Application](#)

Invoice

- Contractor invoice or itemized receipt must include a description of qualified service, itemized costs, and purchase and service dates.

Proof of Payment

- Proof of payment is third-party documentation that the product or service was paid for. The proof of payment submitted must match the total on the invoice.
 - Payments made by **check** require one of the following: 1) copy of canceled check or 2) bank statement showing full payment.
 - Payments made by **credit card** require one of the following: 1) charge receipt or 2) credit card statement showing full payment.
 - Payments **financed** require a signed finance agreement that includes:
 - Customer and contractor name and signature.
 - Amount financed.
 - Terms and conditions.

AHRI (Air-Conditioning, Heating and Refrigeration Institute) Certificate

- A certificate of AHRI-Certified Performance is required when applying for the central air conditioner, heat pump equipment and ductless heat pump equipment incentives.
- This certificate is used to verify the equipment efficiency including SEER, EER, and HSPF ratings.
- Contractors/customers can determine the AHRI number for equipment, verify efficiency specs, and print out a certificate at www.ahridirectory.org.

Program Tune-up Worksheets

- Tune-up worksheets verify and capture data related to system air flow and refrigerant charge.
- Program worksheet must be completed by a program qualified contractor.
- Program worksheets are available by calling the contractor hotline at (800) 942-0287 or by e-mailing HESTradeAlly@peci.org.