Comfort Connect

HVAC REBATE-READY CHECKLIST

YOUR STEP-BY-STEP GUIDE TO NAVIGATING FEDERAL AND STATE INCENTIVES AND GETTING THE SAVINGS WHERE THEY BELONG.

CATEGORY	ITEM	DONE	NOTES
Program Research & Prep	• Identify relevant federal programs (e.g., IRA heat-pump tax credits)		
	• Bookmark your state's rebate portal (DSIRE® or state energy office)		
	• Note any upcoming deadline or funding caps		
Pre-Qualification Questions	• Ask homeowner about any recent energy audits or efficiency upgrades		
	• Confirm home ownership and primary residence status		
	• Verify existing equipment age and type (e.g., 10+ year-old HVAC)		
	• Check income-based or utility-based eligibility requirements		
Documentation & Paperwork Prep	• Gather manufacturer model numbers and efficiency ratings		
	• Collect homeowner contact info, address, and tax ID (if needed)		
	• Prepare copies of prior utility bills (if required)		
	• Print or download rebate application forms		
Sales Conversation Integration	• Show gross price vs. net price after rebate on your quote		
	• Highlight estimated rebate amount in bold on proposal		
	• Offer to handle all rebate paperwork on homeowner's behalf		
	• Explain timeline: application → approval → check or credit		

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Submission & Tracking	• Complete online forms immediately after signed proposal		
	• Upload or mail supporting docs within program deadlines		
	• Log submission date and confirmation number in CRM or spreadsheet		
	• Schedule follow-up reminder 7 days before rebate deadline		
Schedule follow-up reminder 7 days before rebate deadline	• Send homeowner a simple “We’ve applied for your rebate” email		
	• Track approval status and relay updates to homeowner		
	• Confirm receipt of rebate check/credit and share final net cost		
	• Save copies of approval letters and rebate payments in your files		
Continuous Improvement	• Review which programs your team uses most and update cheat sheet		
	• Note any common homeowner questions or pain points		
	• Schedule quarterly training refresh on new/updated rebates		
	• Celebrate wins: share successful rebate stories in your next team meeting		

✅WITH THIS CHECKLIST IN HAND, TURN REBATE COMPLEXITY INTO CUSTOMER WINS—EVERY TIME. GOOD LUCK!