

PSE Checklist

OVERVIEW

To improve submission accuracy and reduce processing delays, the following checklist has been developed for all HVAC program applications.

1. Invoice Requirements - Ensure the customer invoice includes:

- ✓ Installation address
- ✓ Installation date
- ✓ Include both indoor and outdoor model numbers.
- ✓ Include both indoor and outdoor serial numbers.
- ✓ Quantities of equipment installed
- ✓ Pass through incentive value: At least 60% of the rebate value must go to the customer. Clear labeling of "PSE Midstream Rebate Credit" or equivalent language must be present.

2. Data Consistency

- ✓ Model and serial numbers must match exactly from what is provided on the portal and the uploaded invoice.

3. QA/QC Readiness

- ✓ Be prepared for post-installation inspections (virtual or in-person) if flagged for QA/QC.
- ✓ Make sure you inform your customers so that they are aware of the possibility of an inspection.