

## PROPOSAL AND INVOICE CHECKLIST

Project proposals are submitted at reservation; final invoices are submitted at payment request. **All project proposals and final invoices submitted to the program must match exactly what is delivered to the customer.** The program-provided Contract and Invoice Templates are supplemental only and will not be accepted as stand-alone documentation.

### Proposal and Invoice Requirements

- On company letterhead
- IRA Registered Contractor name, address, and phone number
  - Name of subcontractor(s) (must also be an IRA Registered Contractor)
- Customer name and address
- Installation address
- Date proposal/invoice provided to customer
- Date of project completion\*
- Total project cost before rebates applied\*
  - Cost per measure installed
- Total amount of non-IRA rebates\*
- Total amount of IRA rebates\*
  - Rebate provided per measure
  - Note “instant discount” or “rebate due to customer after project completion” (only allowed on HOMES moderate- and higher-income projects).
- Final out-of-pocket cost to customer\*
  - Amount due to contractor if rebate will be sent to customer
- Invoice – work must match what was submitted on proposal
- Invoice – dated customer signature

\* *Proposal = estimated date/cost; Invoice = actual date/cost*

### Detailed descriptions of work must be provided, with costs broken down by measure.

All work provided to the customer as part of project, including work not covered by the IRA programs MUST be listed. Only approved measures are eligible for IRA rebates. Check the Approved Measures lists ([HEAR](#), [HOMES](#)) to make sure rebates are only requested for eligible equipment. Detailed descriptions allow the program to quickly verify eligibility and approve applications.

## Insulation

(List separate from air sealing.)

- Each space improved must be listed as a separate line item with its own detailed description – attic, wall, foundation, sill, crawlspace, cantilevered floor, etc.
- Total area improved
- Pre- and post-conditions
  - Was existing insulation removed?
  - Material type – removed and installed
  - Depth and/or R-value – existing and installed
- Other items installed? E.g. vent chutes, dams, hatches, etc.

## Electric Panel

(List separate from Electric Wiring.)

- Detailed description of work, including reason for update, e.g.
  - What is the underlying issue being addressed (Safety, Electrification, or Transportation)
  - How does this installation fix it?
  - What current or future electrification project is this supporting?
- Existing panel
  - Amp size
  - Manufacturer & Model number
- New panel
  - Amp size
  - Manufacturer & Model number

## Air Sealing

(List separate from insulation.)

- Each space improved must be listed as a separate line item with its own detailed description, including major penetrations addressed
- Material type
- Other items installed? e.g. can light or fan boxes

## HVAC, Water Heaters, Appliances, Fans

- Equipment being replaced
  - Type – include description of entire system
  - Model numbers
  - Locations, if multiple units exist
  - Efficiency (estimated is acceptable)
- New equipment installed
  - Type – include description of entire system
  - Model numbers
  - AHRI (HVAC only)
  - Efficiency (HVAC,WH)
- Furnace costs listed separately (HVAC)

## Electric Wiring

(List separately from Electric Panel.)

- Detailed description of work, including reason for update e.g.
  - What material is being replaced? Installed?
  - What is the underlying safety issue being addressed, and how does this installation fix it?
  - What electrification project being installed is this supporting?
  - Installation of wiring in support of renewable energy system or electric vehicle (EV) charger
- Location(s) of wiring updates