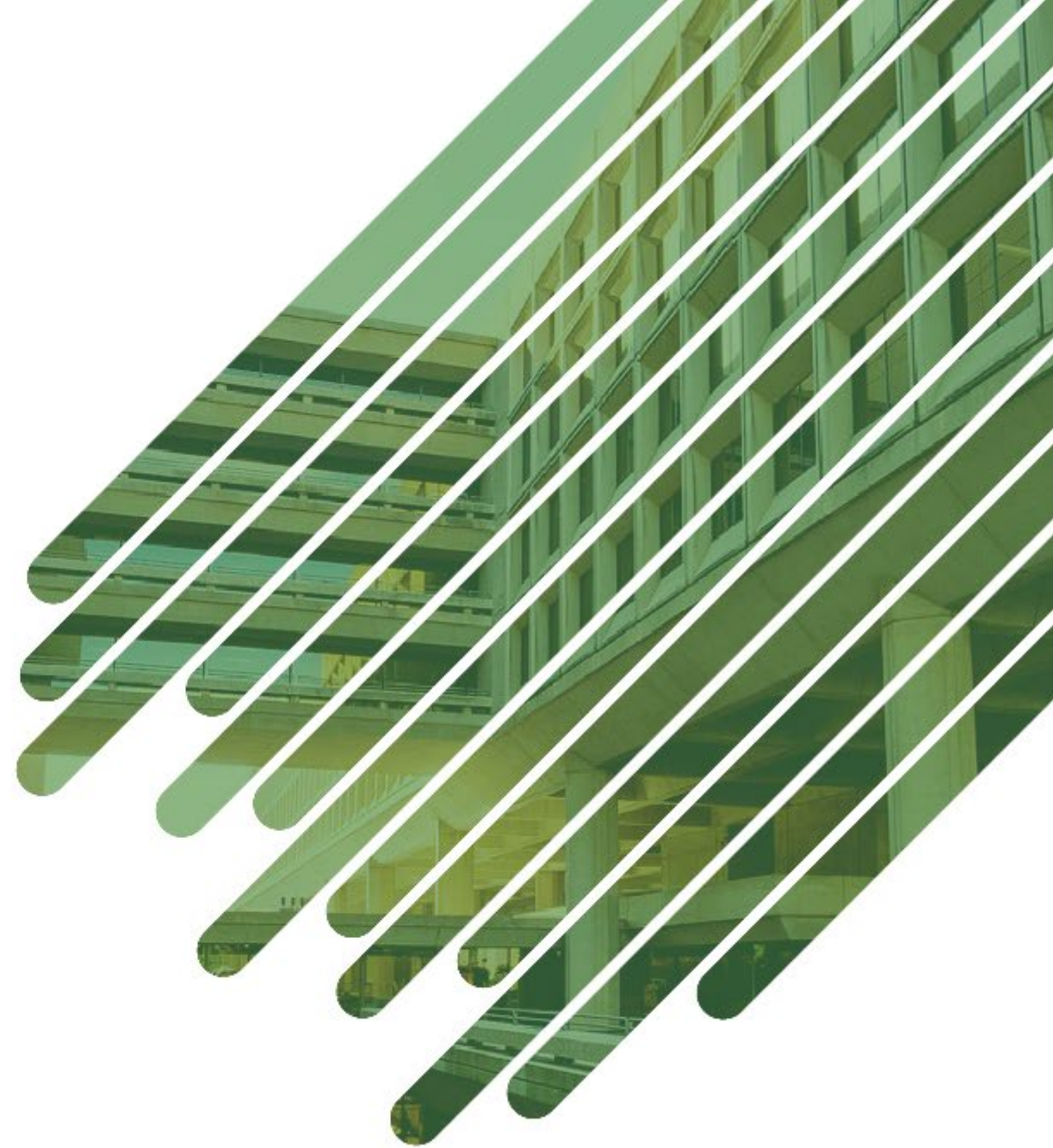




U.S. DEPARTMENT OF
ENERGY

DOE's Rebate Tracking System: Overview of 50121 Workflows



Agenda

- Purpose of today's webinar
- DOE's Rebate Tracking System
- Workflow walkthroughs
- Discussion/comments

Overview of 50121 Home Efficiency Rebates

Level of Energy Savings	Households Below 80% Area Median Income (AMI) ^{1, 2}	Households Above 150% AMI
Home Efficiency Project with at least 20% predicted energy savings³	<ul style="list-style-type: none"> 80% of project costs up to \$4,000 	<ul style="list-style-type: none"> 50% of project costs up to \$2,000 per home/housing unit Maximum of \$200k for a multifamily building
Home Efficiency Project with at least 35% predicted energy savings³	<ul style="list-style-type: none"> 80% of project costs up to \$8,000 	<ul style="list-style-type: none"> 50% of project costs up to \$4,000 per home/housing unit Maximum of \$400k for a multifamily building

¹ See Area Median Income (AMI) for your area:
https://www.huduser.gov/portal/datasets/il/il2022/select_Geography.odn

² States can propose higher rebate levels for low-income households.

³ Other rebate amounts may be available for projects implemented through measured savings method.

Primary Goals in Developing DOE Rebate Tracking System

- Simplify the process for rebate stakeholders
 - States, homeowners, retailers/vendors, contractors, others
 - Minimize reporting burden
 - Ensure consistent data for tracking & evaluation
-
- Leverage private sector expertise
 - Rebate processing
 - Income verification
 - User interfaces
 - Other

DOE Rebate Tracking System: Primary Functionality

- Accessible via API by states, implementers, vendors, others
- Tracks and assists with rebate initiation (coupons)
- Facilitates interactions with retailers, distributors, others
- Puts in place safeguards to ensure adherence to individual household rebate limits (e.g., \$14K/household in 50122)
- Enforces rebate reserves
 - Maintains sufficient funds in cases where a state sets a floor for the amount of rebates that must go to specific targeted use cases such low-income, multifamily, DACs
- Simplifies state reporting (e.g., tracks total rebates; types of rebates; rebates to low-income, DACs, multifamily)
- Provides capability to conduct AMI search engine by zip code & number of occupants
- Provides mapping capability to identify if homes are in disadvantaged communities (still TBD)
- Provides administrative portal to assist states in monitoring and analyzing rebate-supported projects

Related State Responsibilities

- Verify income
- Process rebate payments to retailers, contractors, aggregators
- Apply DOE data specifications
- Fulfill DOE documentation requirements
- Fulfill rebate-specific¹ data reporting requirements through one of the following methods
 - 1) Use DOE workflows (via API)
 - 2) Use API to submit data but do not use the DOE Rebate Tracking System
 - 3) Use a DOE-provided standardized spreadsheet to provide required data (that would otherwise be sent via API)

¹States must report additional programmatic data via a separate DOE portal; however, these are not rebate-specific transactional data points.

Previous Webinars on Rebate Tools

June 22, 2023 – Introduction to DOE Rebate Tracking System

- Introduction to IRA Rebates
- Guiding Principles for Development of Rebate Tools
- Basic Needs to Process & Track Rebates
- Roles: DOE/PNNL & States
- State-led Income verification
- Workflows/API overview
- PNNL webpage details

July 25, 2023 – Draft API

- Roadmap for IRA Rebate API
 - Review of the OpenAPI specification

Meeting recordings
and presentations can
be viewed here:



<https://www.pnnl.gov/projects/rebate-tools>

Introduction to 50121 Workflows

- Modeled

- Single-Family, Owner Occupied
- Single-Family, Tenant Occupied
- Multi-Family, Tenant Occupied

- Measured

- Single-Family, Owner Occupied
- Single-Family, Tenant Occupied
- Multi-Family, Tenant Occupied

Please note that PNNL is only responsible for documentation of these workflows and all final design and process decisions are made by DOE.

- ✓ Multiple detailed workflows demonstrate process/linkages between relevant parties.
- ✓ Variations reflect type of rebate, applicant type, point of redemption, contractor involvement, and approach to savings calculation.
- ✓ Workflows based on wide range of discussions with relevant stakeholders to ensure easy-to-use, easy-to-integrate system

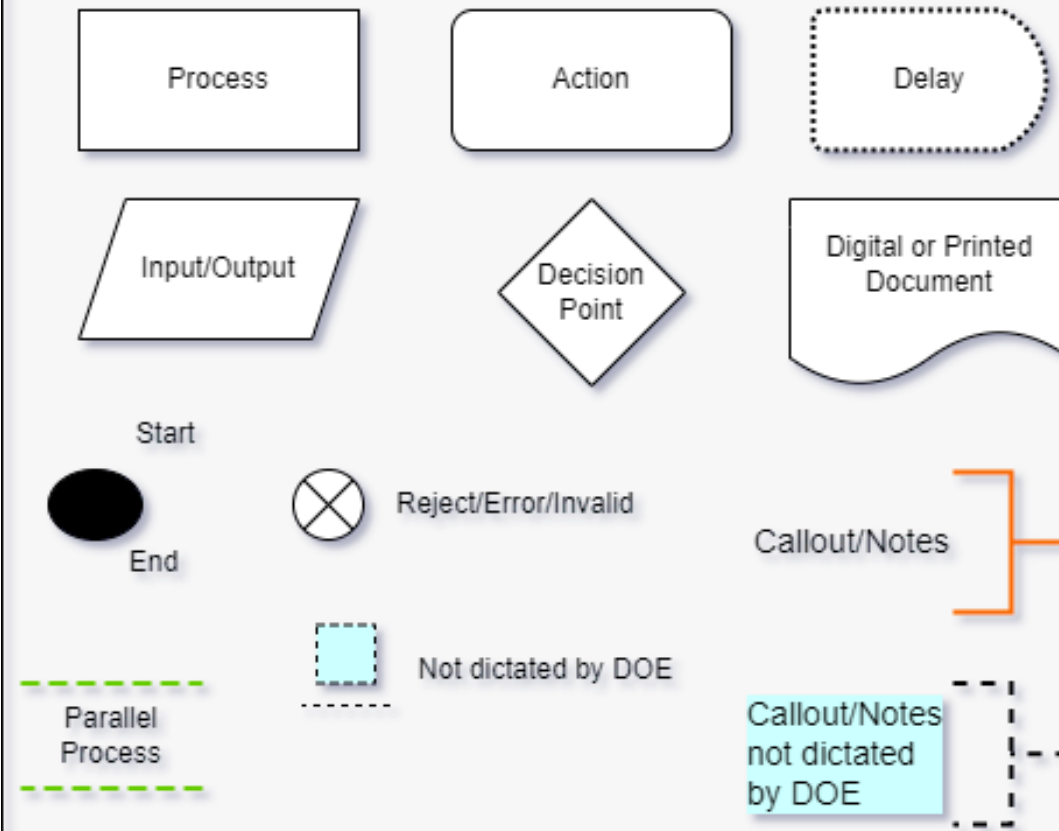
Workflow: Relevant Actors

Title

Tenant	Building Owner	Installer	Vendor	State	3rd Party Back End	DOE Back End

Key




Columns indicate the entity performing the task described and all associated IT buildout necessary to complete the task.



Full requirements can be found in the Data & Tools Requirements Guide




Modeled Workflows

Workflow Number

4.  Single-Family, Owner Occupied
5.  Single-Family, Tenant Occupied
6.  Multi-Family, Tenant Occupied

Measured Workflows

Workflow Number

1.  Single-Family, Owner Occupied
2.  Single-Family, Tenant Occupied
3.  Multi-Family, Tenant Occupied

Next Steps

- Finalize workflows
- Complete API development
 - Beta testing
- Ongoing engagement with stakeholders & API users

Thank You

Answer Questionnaire



<https://forms.gle/UNPGzJ3rZxf48NcWA>

Technical Questions?

Contact PNNL Team

RebateTools@pnnl.gov

Programmatic Questions?

<https://www.energy.gov/scep/home-energy-rebates-frequently-asked-questions>

MORE TO DISCUSS:

- How do workflows relate to program design & implementation
- The workflows provide a path for successful program implementation, outlining the design decisions and buildout necessary for the relevant actors.
- Who's doing what jobs? What software (DC) is needed?
- What elements in the requirements are “taken care of” by the API and workflows

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