U.S. DEPARTMENT OF ENERGY
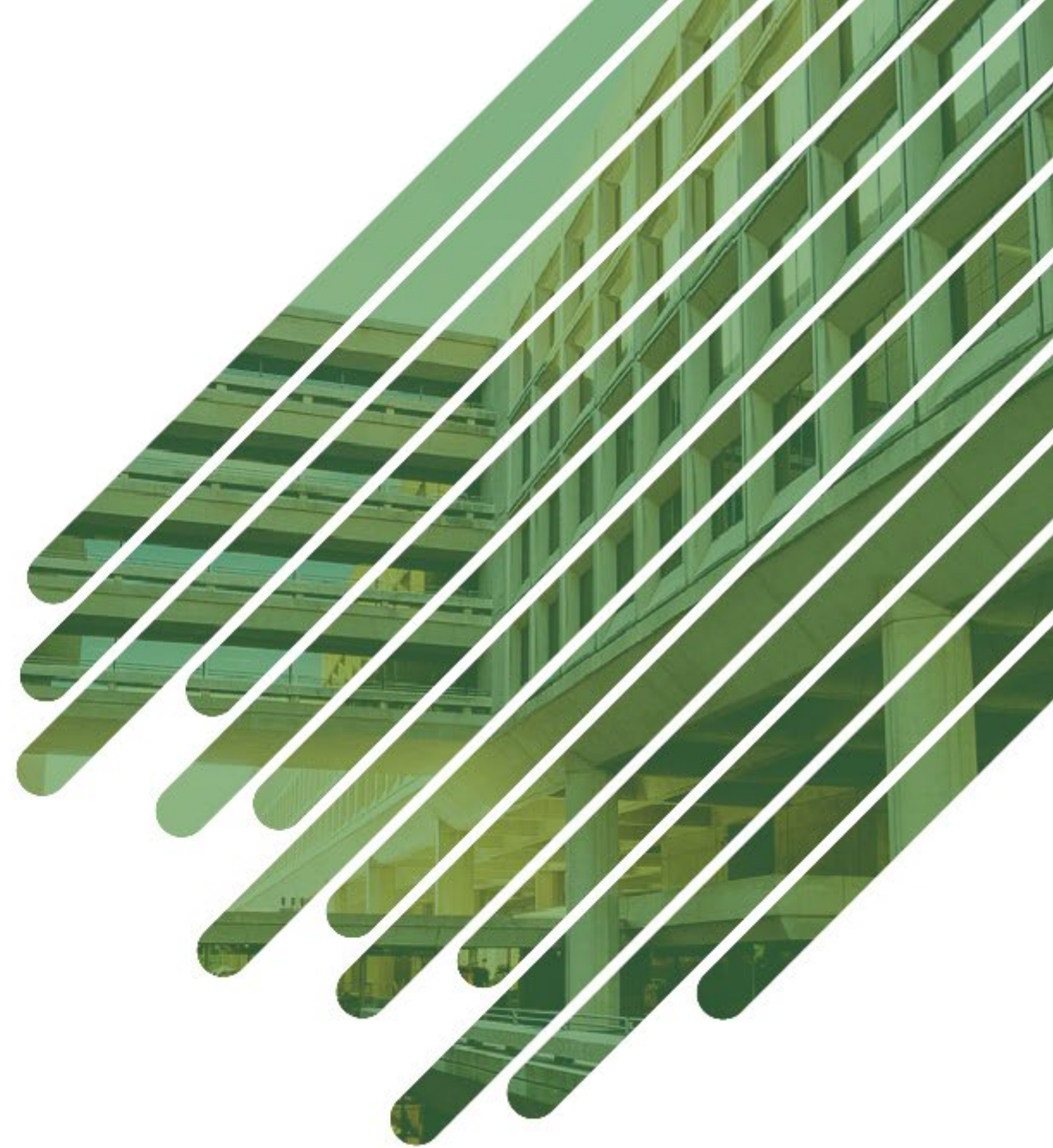
DOE's Rebate Tracking System:

Overview of 50122 Multi-Family Workflows

Agenda

- Purpose of today's webinar

- DOE's Rebate Tracking System

- Workflow walkthroughs

- Discussion/comments

Overview of 50122 Electrification Rebates

Type of Home Energy Project	Households Below 80% Area Median Income (AMI) [1]		Households Between 80% and 150% AMI
Home Electrification Project Qualified Technologies	**The lesser of** - **100% of project cost** - **Product rebate maximum**		**The lesser of** - **50% of project cost** - **Product rebate maximum**
	ENERGY STAR electric heat pump water heater		up to $1,750
	ENERGY STAR electric heat pump for space heating & cooling		up to $8,000
	ENERGY STAR electric heat pump clothes dryer		up to $840
	ENERGY STAR electric stove, cooktop, range, or oven		up to $840
	Electric load service center		up to $4,000
	Electric wiring		up to $2,500
	Insulation, air sealing, and ventilation		up to $1,600
	Maximum total rebates per home address		$14,000

- Single-family, multifamily, and rental properties
- Retrofits as well as new construction

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

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-specific[1] 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)

[1] States 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

Presentations from this week's webinars will be made available on the webpage.
If you would like a copy of a specific meeting recording, please email us at RebateTools@pnnl.gov with your request.

Introduction to Multi-Family 50122 Workflows

- Coupon Redemption at Connected Vendor
  - Multi-Family
- Coupon Redemption Post Equipment Purchase
  - Multi-Family

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.

✓ Workflows based on wide range of discussions with relevant stakeholders to ensure easy-to-use, easy-to-integrate system.
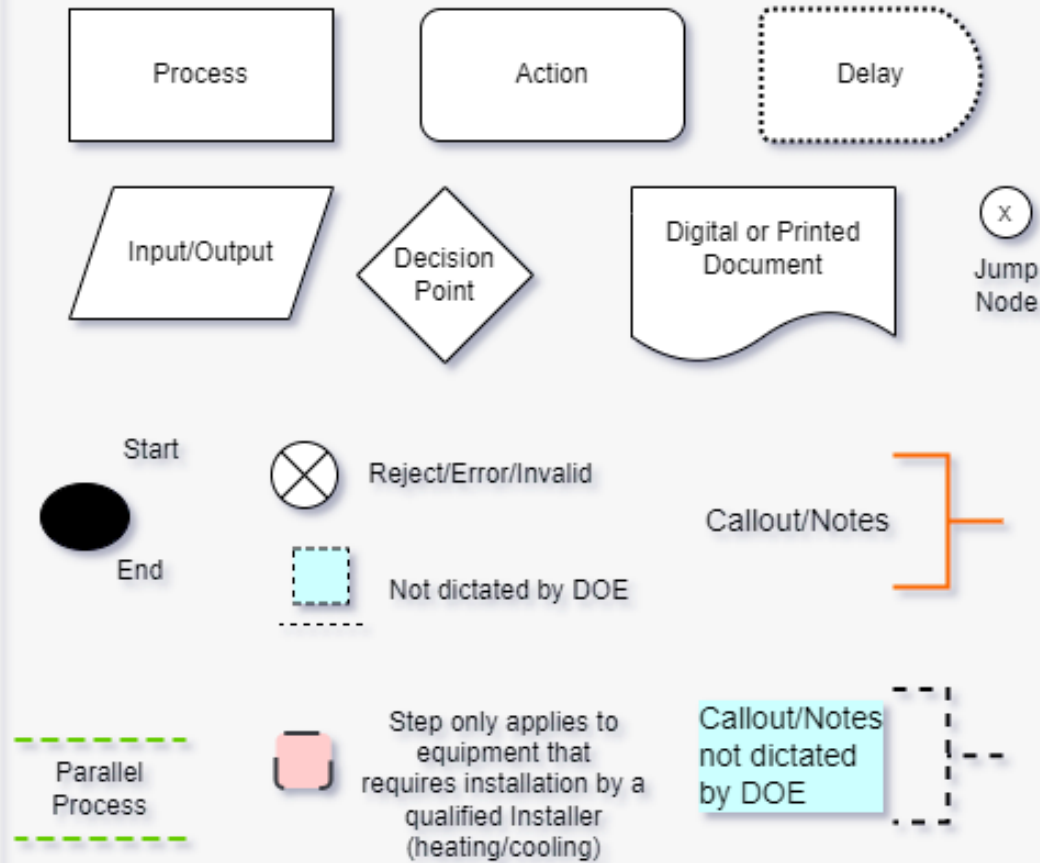
Workflow: Relevant Actors

Title

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

Key

Multi-Family Electrification Workflows: Connected Vendor

Workflow Number

9. 🔗 Multi-Family Building On Behalf Of (OBO) Building Owner

10. 🔗 Multi-Family Building On Behalf Of (OBO) Building Tenant

Workflow Number

14. 🔗 Multi-Family Building On Behalf Of (OBO) Building Owner
15. 🔗 Multi-Family Building On Behalf Of (OBO) Building Tenant

Next Steps

- Finalize workflows
- API beta testing
  - Be on the lookout for signup invitations in September
- Ongoing engagement with stakeholders & API users

Thank You

Provide Feedback

Technical Questions?
Contact PNNL Team
RebateTools@pnnl.gov

Programmatic Questions?

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