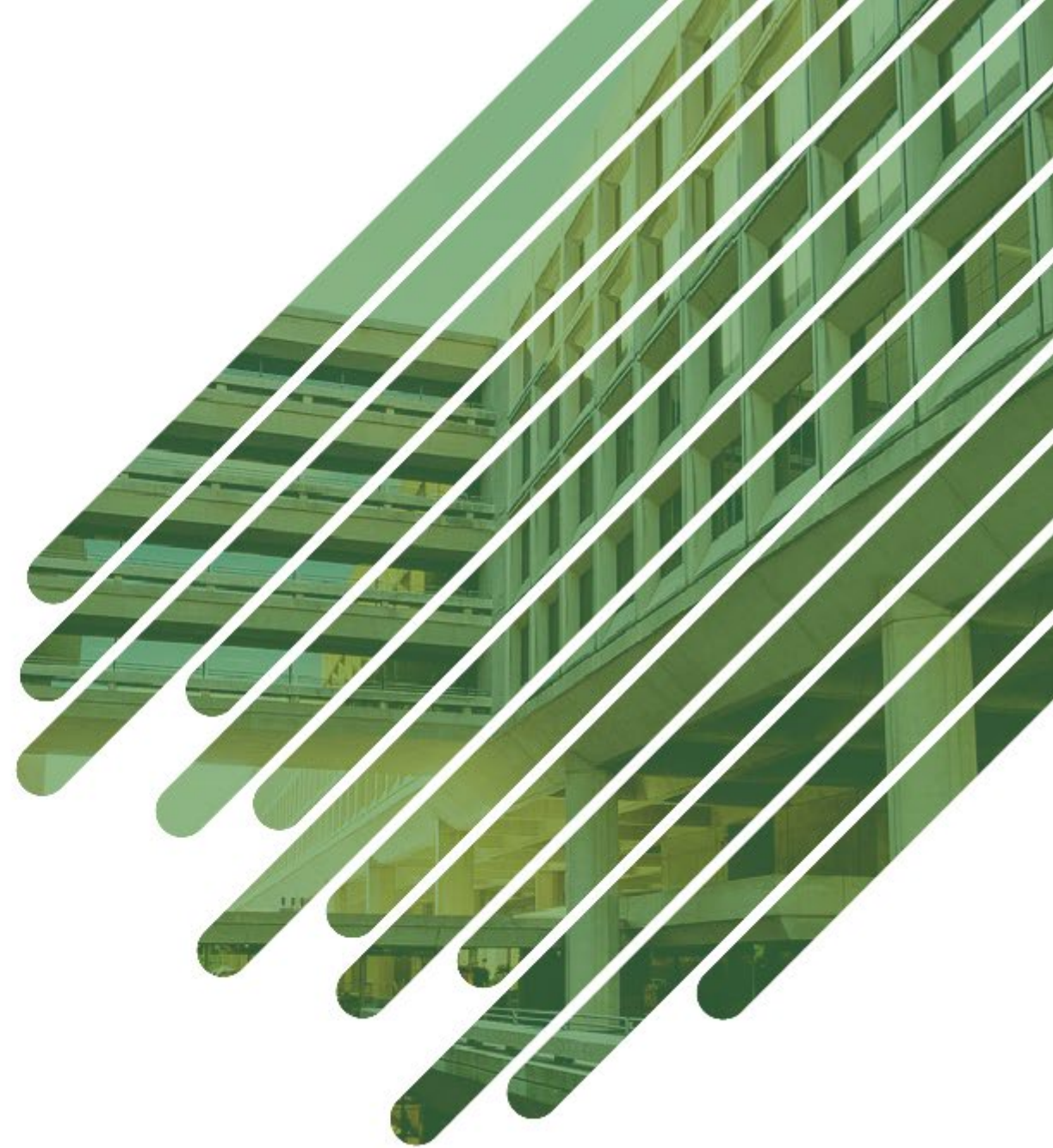




U.S. DEPARTMENT OF  
**ENERGY**

# **DOE's Rebate Tracking System:**

## **Overview of 50122 Workflows for Connected Vendors**



# Agenda

---

- Brief Introduction to Electrification Rebates
- DOE's Rebate Tracking System
- Workflow walkthroughs
- Next steps

# Overview of 50122 Electrification Rebates

Type of Home Energy Project	Households Below 80% Area Median Income (AMI) <sup>1</sup>	Households Between 80% and 150% AMI
<b>Home Electrification Project Qualified Technologies</b>	<b>The lesser of</b> - <b>100% of project cost</b> - <b>Product rebate maximum</b>	<b>The lesser of</b> - <b>50% of project cost</b> - <b>Product rebate maximum</b>
	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

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

# Basic Functionality Needed to Process & Track Rebates

- Verify income eligibility
- Verify eligibility of home address
- Ensure rebates applied to eligible products & services
- Ensure appropriate dollar amount per product/service/home
- Adhere to caps per measure and/or per home

# Guiding Principles in Developing DOE Rebate Tracking System & API

---

- Simplify the process for rebate stakeholders
  - States, homeowners, retailers/vendors, contractors, others
- Reduce reporting burden
- Ensure consistent data for tracking & evaluation

# Vendor's responsibilities

---

- Verify product's eligibility for the rebate
  - Connect to EPA's API for real-time verification\*
  - OR
  - Verify via spreadsheet issued by Energy Star (spreadsheet is updated weekly)
- Verify the validity of the coupon
- Ensure that invoice includes all required data to meet program requirements (e.g., model number)

\* Preferred Approach

# DOE Rebate Tracking System: Primary Functionality

- **Accessible via API by states, implementers, vendors, others**
  - **Tracks and assists with rebate initiation (coupons)**
    - Provides relevant rebate coupon data to implementers so that they can issue coupons to relevant entities (retailers, other vendors, contractors, homeowners)
  - **Facilitates interactions with retailers, distributors, others**
    - Ensures that homeowners/installers have been approved for the rebate prior to purchase
    - Puts in place safeguards to ensure adherence to individual household rebate limits (e.g., \$14K/household in 50122)
  - **Collects all transaction-related data that is required to be submitted to DOE**
- 
- Simplifies state reporting (e.g., tracks total rebates; types of rebates; rebates to low-income, DACs, multifamily)
  - Provides capability to conduct AML 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**
- **Provide user interface for entities applying for rebates**
- **Verify that the product is installed correctly**
- Fulfill rebate-specific 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)**



# Previous Webinars on Rebate Tools

[June 22, 2023 – Introduction to DOE Rebate Tracking System](#)

[July 25, 2023 – Draft API](#)

[August 28, 2023 – 50121 Workflow Webinar for Implementers](#)

[August 29, 2023 – Single-Family 50122 Workflow Webinar for Implementers](#)

[August 30, 2023 - Multi-Family 50122 Workflow Webinar for Implementers](#)

Meeting recordings  
and presentations can  
be viewed here:



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

# Introduction to 50122 Workflows for Connected\* Vendors

## • Coupon Redemption at Connected Vendor

- Single-Family, Owner Occupied
- Single-Family, Tenant Occupied
- Multi-Family, Tenant Occupied
  - On behalf of Building Owner
  - On behalf of Unit Tenant
- Single-Family, Owner Occupied (DIY)

*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.
- ✓ Workflows based on wide range of discussions with relevant stakeholders to ensure easy-to-use, easy-to-integrate system.
- \* Homeowner/installer will have the option to select a specific “connected” vendor or opt for a “generic” coupon when initiating a rebate request.
  - \* Both types of coupons will provide the vendor with all of the required information (maximum rebate allowed, etc.)
    - \* Coupons with specific vendor will be electronically formatted
    - \* Generic coupons will have all relevant information printed and provide a URL for additional information
  - \* Vendors that do NOT use the API are encouraged to apply the “generic” coupon at point of sale and then use a state-provided interface to submit required information in order to be reimbursed for the rebated amount.

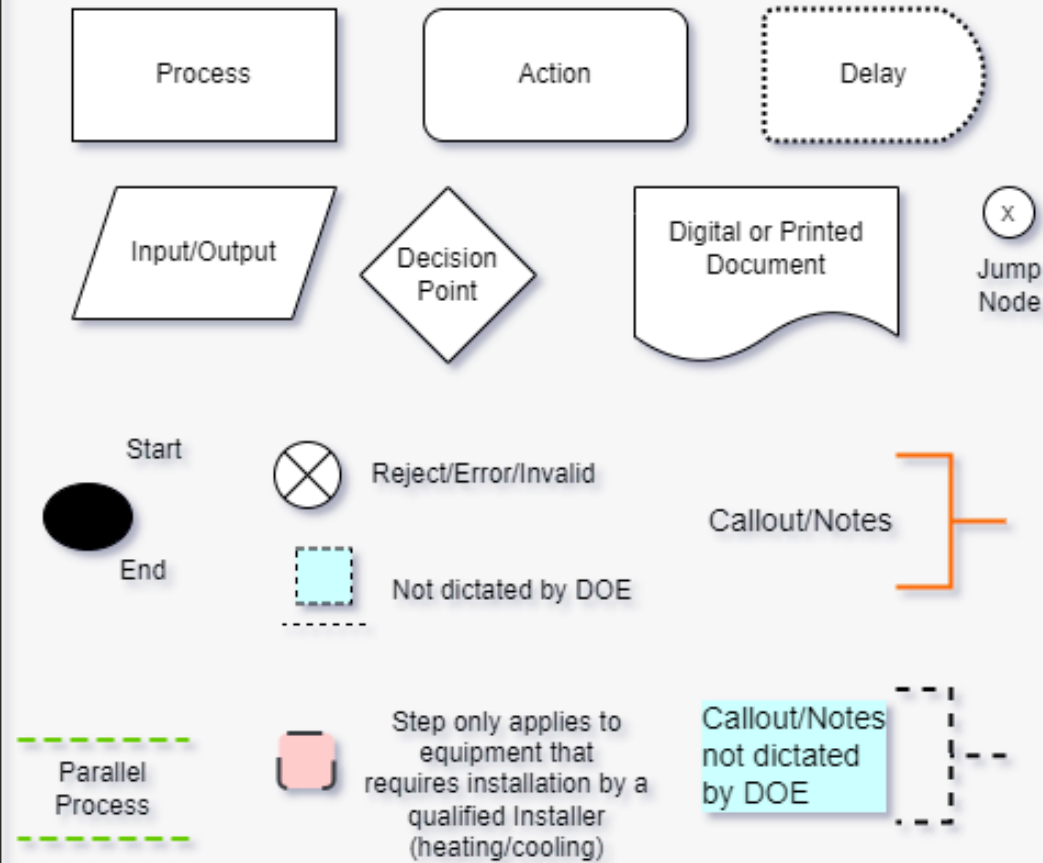
# Workflow: Relevant Actors

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](#)

# Single-Family Electrification Workflows: Connected Vendor

## Workflow Number

- 7.  Single-Family, Owner Occupied
- 8.  Single-Family, Tenant Occupied
- 11.  Single-Family, Owner Occupied (DIY)

# Multi-Family Electrification Workflows: Connected Vendor

---

## Workflow Number

9.  Multi-Family, Tenant Occupied OBO Building Owner
10.  Multi-Family, Tenant Occupied OBO Unit Tenant

# Next Steps

- Please provide feedback on the proposed workflows using this form:



<https://forms.gle/DgqRGRWHWh6xwWpB8>

- API beta testing
  - Be on the lookout for signup invitations in September

# Thank You

Programmatic Questions?



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

Technical Questions?

Contact PNNL Team  
[RebateTools@pnnl.gov](mailto:RebateTools@pnnl.gov)