



U.S. DEPARTMENT OF
ENERGY

DOE's Rebate Tracking System:

Overview of 50122 Single-Family Workflows



Agenda

- Purpose of today's webinar
- DOE's Rebate Tracking System
- Workflow walkthroughs
- Discussion/comments (*time permitting*)

Overview of 50122 Home Efficiency 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
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- 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 Single-Family 50122 Workflows

- Coupon Redemption at Connected Vendor
 - Single-Family, Owner Occupied
 - Single-Family, Tenant Occupied
 - Single-Family, Owner Occupied (DIY)
 - Coupon Redemption Post Equipment Purchase
 - Single-Family, Owner Occupied
 - Single-Family, Tenant Occupied
 - Single-Family, Owner Occupied (DIY)
- ✓ 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.
- Please note that PNNL is only responsible for documentation of these workflows and all final design and process decisions are made by DOE.*

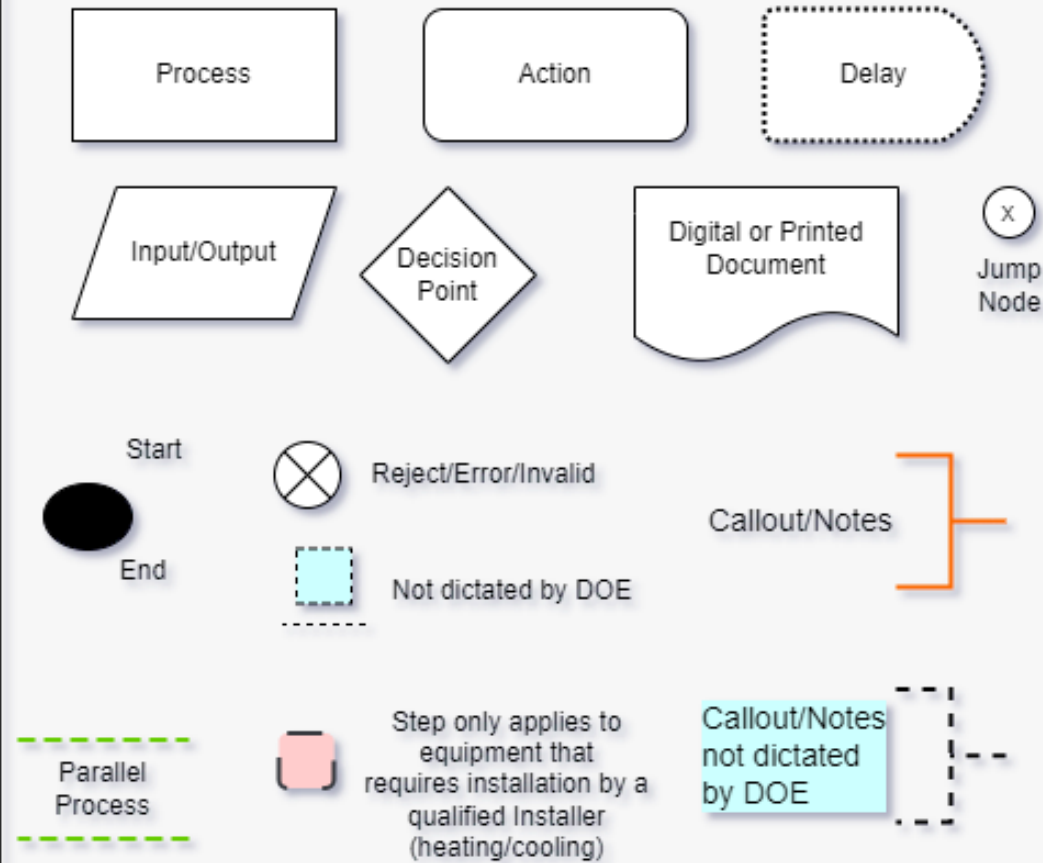
Workflow: Relevant Actors

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)

Single-Family Electrification Workflows: Post-Equipment Purchase

Workflow Number

- 12.  Single-Family, Owner Occupied
- 13.  Single-Family, Tenant Occupied
- 16.  Single-Family, Owner Occupied (DIY)

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



<https://forms.gle/WQaJmugCCcdE7Ubw6>

Technical Questions?

Contact PNNL Team

RebateTools@pnnl.gov

Programmatic Questions?

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