



Pacific Northwest

NATIONAL LABORATORY

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

Process

Action

Input/Output

Decision Point

Jump Node

Parallel Process

Digital or Printed Document

Digital or Printed Documents

Delay

Start

End

Reject/Error/Invalid

Only applicable when reporting type is real-time and program is using a participating, non-connected vendor

Not dictated by DOE

Step only applies when project requires a Limited Home Assessment

Callout/Notes not dictated by DOE

Callout/Notes dictated by DOE

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

*Any eligible entity representative or eligible rebate recipient can assign a 50121 or 50122 rebate to a third party, a.k.a. Aggregator, after completion of a related transaction (e.g., equipment purchase, installation). In such cases, the state, territory, Tribe, or implementer will remit payment to the Aggregator after the Aggregator submits all required data and documentation regarding the rebated project. Aggregators, subject to programmatic requirements, may be used to facilitate stacking of rebates, braiding rebates with other incentives, contractor financing, advanced funding, and/or rebate processing among other functions.

**Installation agreement or delivery photos may suffice to meet post-installation photo requirements. See Data & Tools Requirements Guide for additional information.

10.2

50122 Real-Time Reporting

- Initiated by Installer, Aggregator*, or Eligible Entity Representative (EER) On Behalf of Unit Tenant
- Multi-Family Building
- Coupon Redemption at Connected Vendor
- Only Applicable to In-Unit Upgrades

The flowchart details the 50122 Real-Time Reporting process, organized into columns by entity: Tenant, Building Owner, Claimant (Installer, Aggregator, EER), Vendor, State, Territory, or Tribe, Program Implementation, and DOE API.

Key Process Steps:

- Initiation:** Starts with a decision on "Is Project New Construction?". If "Yes", it proceeds to "Initiate Rebate Request" and "Submit Building/Unit Eligibility, Building Owner Attestation, and Pre-Installation Photos". If "No", it goes to "Are Proposed Upgrades In-Unit or Central?".
- Eligibility & Verification:** Involves "Verify Eligibility" (checking installer, household, address, SOW) and "Verify Reservation Eligibility". If eligible, a "Rebate Reservation" is submitted and a "Notify Building Owner" is sent.
- Installation & Redemption:** Includes "Purchase Equipment and Materials Using Coupon At Vendor", "Perform Installation", and "Perform Safety Testing (when necessary)". This leads to "Submit Redeemed Coupon, Purchase Receipt, and Delivery Photo(s)", followed by "Remediation Process" and "Receive Rebate Payment".
- Rebate Calculation & Issuance:** "Validate Coupon Redemption" leads to "Issue Rebate Reimbursement to Vendor" and "Calculate Remaining Rebate Amount". A "Notice" is sent to the Building Owner and Installer with the remaining amount.
- Invoice & Refund Process:** Involves "Collect Quality Installation Documentation and Post-Installation Photos", "Provide Invoice and Safety Testing Results", and "Submit Invoice, Home Address, Purchase Receipt, QI Documentation, and Pre- and Post-Installation Photos". This leads to "Pay Installer (minus approved rebate amount)" and "Pay Building Owner (minus approved rebate amount)".
- Refund & Redemption:** Includes "Issue Rebate Reimbursement to Installer and Consumer Satisfaction Survey to Consumer", "Remove Installer Eligibility", "Issue Notice of Removal to Installer", and "Issue Refund to Building Owner".
- Final Steps:** "Submit Redemption" leads to "Remedy Redemption Error(s)" or "Report All Required Data to State", which then leads to "End".

Callouts and Notes:

- Building Owner to:** Attest to affordability requirements and renter protections; Provide number of occupied units; Provide contact information; Pre-installation photos may be provided by the installer and/or in a different sequence.
- Itemized Invoice Must Include:** Total cost; Equipment cost(s); Material costs; Rebate amount applied to equipment/material costs; Labor; Rebate amount applied to labor/install costs (where applicable).
- Notice must show:** Approved rebate amount; Rebate expiration date; Ability to cancel rebate reservation; Language such as, "Note: You are financially obligated to pay for any costs not covered by this coupon."
- Reservation will show:** Reserved rebate amount; Address ID; Applicant ID; Vendor Coupon ID; Rebate expiration date (if known).

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