

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

Start

End

Digital or Printed Document

Digital or Printed Documents

Delay

Reject/Error/Invalid

Parallel Process

Step only applies when project requires a Limited Home Assessment

Callout/Notes not dictated by DOE

Callout/Notes

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.

**A state program can comply with post-install photo requirements by either collecting geotagged photos of product delivery or by requiring an agreement by the household that received a rebate to provide photos upon request. See Data & Tools Requirements Guide for additional information.

7.1

50122 Manual Reporting

Building Owner

Claimant (Installer, Aggregator, EER)

Vendor

State, Territory, or Tribe

Program Implementation

DOE API

Flowchart Details:

- Building Owner:** Start, Is Project New Construction?, Submit Household Eligibility and Pre-Installation Photos, Building Owner/Property Development Company Attestation, Prepare for Project Commencement, Perform Installation, Perform Safety Testing (when necessary), Pay Installer Any Remaining Costs of Improvement, Receive Rebate Payment for Labor/Installation, Return Consumer Satisfaction Survey and Installation Agreement (if issued), Return Complete Refund Application, Consumer Satisfaction Survey, and Installation Agreement, Remediation Process, Receive Refund for Remaining Rebate Amount, End.
- Claimant (Installer, Aggregator, EER):** Perform Limited Home Assessment, Initiate Rebate Request: Submit Contractor Details (where applicable), Home Details, Proposed Measure(s), Pre-Installation Photos, and Vendor Selection, Submit Invoice, Home Address, Purchase Receipt, QI Documentation, and Pre- and Post-Installation Photos, Provide Corrected Invoice and Refund to Building Owner, Submit Corrected Invoice, Home Address, and Refund Attestation, Notice of Removal from Eligible Installer List, Refund Application: Consumer Satisfaction Survey, Installation Agreement, Return Complete Refund Application, Consumer Satisfaction Survey, and Installation Agreement, Remediation Process, Receive Refund for Remaining Rebate Amount, End.
- Vendor:** Vendor Coupons, Submit Redeemed Coupon, Purchase Receipt, UPCI/AHR/Item Code(s), and Delivery Photo(s), Remediation Process, Receive Rebate Payment, End.
- State, Territory, or Tribe:** Eligible Installer List (Updated Daily), Verify Eligibility, Issue Rebate via Vendor Coupon, Validate Coupon Redemption, Issue Rebate Reimbursement to Vendor, Calculate Remaining Rebate Amount, Notify Building Owner and Installer of Remaining Rebate Amount, Has Project Invoice Been Submitted?, Have 30 Days Passed Since Coupon Redemption?, Delay Until 30 Days From Coupon Redemption, Does Project Invoice Accurately Reflect Approved Measure With Rebate Correctly Applied?, Program-Determined Noncompliance Process, Issue Program-Determined Warning to Eligible Installer and Notice to Building Owner, Delay Until Warning Timeframe Has Passed, Has Installer Submitted Corrected Invoice?, Issue Rebate Reimbursement to Installer and Consumer Satisfaction Survey to Building Owner, Remove Installer Eligibility, Issue Notice of Removal to Installer, Has A Project Invoice Been Received?, Issue Refund, Consumer Satisfaction Survey and Installation Agreement to Building Owner, Issue Refund Application, Consumer Satisfaction Survey and Installation Agreement to Building Owner, Is Refund Application Complete?, Issue Refund to Building Owner, Generate Applicant and Address IDs Using the DOE Template, Return Applicant and Address IDs, Use the Reporting Template or Bulk Reporting Endpoint to Report Project Information, Remediation Submission Error(s), Report All Required Data to State, End.
- Program Implementation:** Vendor Coupons, Verify Eligibility, Issue Rebate via Vendor Coupon, Validate Coupon Redemption, Issue Rebate Reimbursement to Vendor, Calculate Remaining Rebate Amount, Notify Building Owner and Installer of Remaining Rebate Amount, Has Project Invoice Been Submitted?, Have 30 Days Passed Since Coupon Redemption?, Delay Until 30 Days From Coupon Redemption, Does Project Invoice Accurately Reflect Approved Measure With Rebate Correctly Applied?, Program-Determined Noncompliance Process, Issue Program-Determined Warning to Eligible Installer and Notice to Building Owner, Delay Until Warning Timeframe Has Passed, Has Installer Submitted Corrected Invoice?, Issue Rebate Reimbursement to Installer and Consumer Satisfaction Survey to Building Owner, Remove Installer Eligibility, Issue Notice of Removal to Installer, Has A Project Invoice Been Received?, Issue Refund, Consumer Satisfaction Survey and Installation Agreement to Building Owner, Issue Refund Application, Consumer Satisfaction Survey and Installation Agreement to Building Owner, Is Refund Application Complete?, Issue Refund to Building Owner, Generate Applicant and Address IDs Using the DOE Template, Return Applicant and Address IDs, Use the Reporting Template or Bulk Reporting Endpoint to Report Project Information, Remediation Submission Error(s), Report All Required Data to State, End.
- DOE API:** Verify Eligibility, Issue Rebate via Vendor Coupon, Validate Coupon Redemption, Issue Rebate Reimbursement to Vendor, Calculate Remaining Rebate Amount, Notify Building Owner and Installer of Remaining Rebate Amount, Has Project Invoice Been Submitted?, Have 30 Days Passed Since Coupon Redemption?, Delay Until 30 Days From Coupon Redemption, Does Project Invoice Accurately Reflect Approved Measure With Rebate Correctly Applied?, Program-Determined Noncompliance Process, Issue Program-Determined Warning to Eligible Installer and Notice to Building Owner, Delay Until Warning Timeframe Has Passed, Has Installer Submitted Corrected Invoice?, Issue Rebate Reimbursement to Installer and Consumer Satisfaction Survey to Building Owner, Remove Installer Eligibility, Issue Notice of Removal to Installer, Has A Project Invoice Been Received?, Issue Refund, Consumer Satisfaction Survey and Installation Agreement to Building Owner, Issue Refund Application, Consumer Satisfaction Survey and Installation Agreement to Building Owner, Is Refund Application Complete?, Issue Refund to Building Owner, Generate Applicant and Address IDs Using the DOE Template, Return Applicant and Address IDs, Use the Reporting Template or Bulk Reporting Endpoint to Report Project Information, Remediation Submission Error(s), Report All Required Data to State, End.

HOME ENERGY REBATES
U.S. DEPARTMENT OF ENERGY

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