

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

And Junction

Parallel Process

Digital or Printed Document

Digital or Printed Documents

Delay

Start

End

Reject/Error/Invalid

Process not dictated by DOE

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

Step only applies when project requires a Limited Home Assessment

CalloutNotes

CalloutNotes not 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.

**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.

7.2

50122 Real-Time Reporting

- Initiated by Installer, Aggregator*, or Eligible Entity Representative (EER)
- Single-Family, Owner-Occupied Home
- Coupon Redemption at Any Participating Vendor
- Applicable to All Upgrades

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

Initial Steps:

- Building Owner:** Start, Is Project New Construction?, Submit Household Eligibility and Pre-Installation Photos, Building Owner/Property Development Company Attestation.
- Claimant:** Perform Limited Home Assessment (1), Initiate Rebate Request: Submit Contractor Details (where applicable), Home Details, Proposed Measure(s), Pre-Installation Photos, and Vendor Selection. (Include assessment file(s) when report export is available)
- Vendor:** Vendor Coupons, Submit Redeemed Coupon, Purchase Receipt, UPC/AHRU Item Code(s), and Delivery Photo(s)**.
- State, Territory, or Tribe:** Eligible Installer List (Updated Daily), Program requirements determine when eligible installers must be used.
- Program Implementation:** Vendor Coupons, Verify Eligibility (Installer, Household, Address, Vendor, SOW), Submit Rebate Reservation, Verify Reservation Eligibility, Return Rebate Reservation, Issue Rebate via Vendor Coupon, Validate Coupon Redemption (2), Issue Rebate Reimbursement to Vendor, Calculate Remaining Rebate Amount, Notify Building Owner and Installer of Remaining Rebate Amount.
- DOE API:** Vendor Coupons, Return Remaining Rebate Amount.

Intermediate Steps:

- Building Owner:** Building Owner Notification, Prepare for Project Commencement, Purchase Equipment and Materials Using Coupon At Vendor, Perform Installation, Perform Safety Testing (when necessary) (3), Submit Invoice, Home Address, Purchase Receipt, QI Documentation, and Pre- and Post-Installation Photos**.
- Claimant:** Vendor Coupon, Notify Building Owner of Project Commencement, Submit Redeemed Coupon, Purchase Receipt, UPC/AHRU Item Code(s), and Delivery Photo(s)** (2), Receive Rebate Payment, End.
- Vendor:** Remediation Process, Receive Rebate Payment, End.
- State, Territory, or Tribe:** Remediation Process, Receive Rebate Payment, End.
- Program Implementation:** 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."; Notice should include: Must include note of available installation incentives, Issue vendor coupon (if necessary).
- DOE API:** Reservation will show: Reserved rebate amount, Address ID, Applicant ID, Vendor Coupon ID (unless non-connected vendor), Rebate expiration date (if known).

Final Steps:

- Building Owner:** Building Owner Remaining Rebate Notification, Collect Quality Installation Documentation and Post-Installation Photos (3), Provide Invoice and Safety Testing Results (when conducted) to Building Owner, Pay Installer Any Remaining Costs of Improvement, End.
- Claimant:** Receive Invoice Payment, Submit Invoice, Home Address, Purchase Receipt, QI Documentation, and Pre- and Post-Installation Photos** (If submitted previously, pre-installation photos are not required to be re-submitted), End.
- Vendor:** End.
- State, Territory, or Tribe:** 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).
- Program Implementation:** Does Project Invoice Accurately Reflect Approved Measure With Rebate Correctly Applied? (5), 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? (5), Issue Rebate Reimbursement to Claimant and Consumer Satisfaction Survey to Building Owner, Remove Installer Eligibility, Issue Notice of Removal to Installer, Has A Project Invoice Been Received? (5), Issue Refund Application, Consumer Satisfaction Survey and Installation Agreement to Building Owner, Is Refund Application Complete? (8), Issue Refund to Building Owner, Submit Redemption, Verify Redemption, Remedy Redemption Error(s), Report All Required Data to State, End.
- DOE API:** End.

Refund Process:

- Building Owner:** Building Owner Refund Notification, Provide Corrected Invoice and Refund to Building Owner, Corrected Invoice and Refund, Attest to Refund Receipt, Submit Corrected Invoice, Home Address, and Refund Attestation, Submit within warning timeframe, Consumer Satisfaction Survey, Return Consumer Satisfaction Survey and Installation Agreement (if issued), End.
- Claimant:** Receive Rebate Payment for Labor/Installation, End.
- Vendor:** End.
- State, Territory, or Tribe:** End.
- Program Implementation:** Issue Refund Application, Consumer Satisfaction Survey and Installation Agreement to Building Owner, Issue Refund to Building Owner, Submit Redemption, Verify Redemption, Remedy Redemption Error(s), Report All Required Data to State, End.
- DOE API:** End.

Documentation: Documentation required should include copy of project invoice.