



U.S. DEPARTMENT
of **ENERGY**

Office of Critical Minerals
and Energy Innovation

**HOME ENERGY
REBATES**
U.S. DEPARTMENT OF ENERGY



Narrative Document Template

IRA Section 50122: High-Efficiency Electric Home
Rebate Program for Indian Tribes

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VERSION 3

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Modification Note: This version updates text in accordance with the Home Energy Rebates [Program Notice 26-3](#) modifications to the [Program Requirements & Application Instructions](#). This version also makes clerical fixes, including reference corrections.

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Introduction

This is an optional document that is not required by the High-Efficiency Electric Home Rebate (HEEHR) Program for Indian Tribes [Administrative and Legal Requirements Document](#) (ALRD) or the [Program Requirements & Application Instructions](#) (PRAI) materials. This Narrative Document is intended to assist in the preparation of a Tribal High-Efficiency Electric Home Rebate Program application [Section 50122 of the Inflation Reduction Act of 2022 (IRA)] to the U.S. Department of Energy (DOE). It is not intended to be used verbatim, but rather to serve as a template/sample for eligible Indian Tribes.¹

This Narrative Document should demonstrate the Tribe's ability and intent to implement the program in accordance with the requirements of the [Administrative and Legal Requirements Document](#) and the [Program Requirements & Application Instructions](#). The Narrative Document must provide a comprehensive framework and description of all aspects of the proposed rebate program(s). Tribes may use existing programs / infrastructure to implement this work. Tribes may not provide these funds to existing programs to implement non-rebate work.

The Narrative Document must be succinct, self-explanatory, and well-organized so that DOE reviewers can understand program design and delivery. A Tribe must address the following in its application package and corresponding Standard Form 424 Application for Federal Assistance, Standard Form 424A Budget Information, and Budget Justification Workbook. A Tribe may defer some responses to its Tribal Implementation Blueprint, to be provided to DOE after receiving the award but 90 days prior to program launch.² The applicable questions are marked as such, and applicants should check the appropriate box if deferring their response to their Implementation Blueprint. All other requirements are mandatory within the Tribal grant application package. If there is no box offering the "Defer response to Tribal Implementation Blueprint" option, then it is required as part of the application package.

¹ IRA Section 50122, "Indian Tribes" has the meaning given the term in Section 4 of the Indian Self-Determination and Education Assistance Act (25 U.S.C. 5304). 42 U.S.C. 18795a(d)(3).

² For more details on the Implementation Blueprint option, see Section 1.2 Implementation Blueprint and Technical Assistance in the Tribal Rebates [Program Requirements and Application Instructions](#).

High-Efficiency Electric Home Rebate Program for Indian Tribes (50122)

Program Overview (Optional)

Please provide a brief overview of your HEEHR program design, including your implementation strategy and whether you will provide only certain rebate upgrades or target specific Tribal household types and/or buildings.

Note: This question is optional. Providing a response will allow DOE to quickly understand the goals and intended approach of your program, which will help to provide program support and to review the answers in the application narrative.

Use of Funds and Rebate Eligibility

Section 3.1.1 Use of Funds

1. Please provide the types of allowable costs the Tribe proposes within the category of **administrative funds**.

Note: These responses should correspond with the Standard Form 424, Standard Form 424A, and Budget Justification Workbook. Please note that a maximum of 20% of the grant can be used for administrative funds.

- a. Provide the total amount of estimated administrative funds to be expended annually:

Note: The total annual administrative funding over the grant period of performance cannot exceed 20% of the grant award amount.

2. Please provide the types of allowable costs the Tribe proposes within the category of **rebate funds**.

Note: [Program Notice 26-3](#) Section 3.3 creates new options for this answer, including using rebate funds to include warranties or accessories necessary for installation and operation and to cover appropriate state, local, or Tribal taxes.

These responses should correspond with the Standard Form 424, Standard Form 424A, and Budget Justification Workbook. Rebate funds indicate the remaining amount of grant funds after subtracting the 20% of the grant that is reserved for administrative funds.

- a. If requesting additional funds for project-related activities, describe and justify each activity and associated budget in the Budget Justification Workbook as well as below.

Note: [Program Notice 26-3](#) Section 3.3 creates new options for this answer, including using rebate funds to cover shipping and contractor travel costs.

- b. Provide the total amount of estimated project-related costs that will be paid from rebate funds to be expended annually:

3. Certify that costs will not be duplicated on other awards and are not duplicative from costs captured in the Indirect Rates.

☐ Yes, the Tribe confirms the above statement.

Section 3.1.2 Rebate Conditions and Levels

4. Confirm that the Tribe will ensure that rebate conditions, levels, and administrative funds are adhered to over the duration of the program.

☐ Yes, the Tribe confirms the above statement.

5. Identify the maximum rebate amounts that will be offered to eligible entities and eligible entity representatives if lower than the allowed amounts.

Note: The DOE welcomes Indian Tribes to design their HEEHR program in a way that best meets their local Tribe's needs. This includes the ability to choose to provide rebates for only certain technologies or residential building types.

6. Describe the documentation requirements related to project costs from eligible entities and eligible entity representatives.³

Note: [Program Notice 26-3](#) Section 3.3 also emphasizes that an eligible entity representative must deduct the total eligible rebate amount from the total project cost prior to calculating the final cost to the eligible entity; the total project cost, rebates applied, and remaining project cost documentation must be provided to both the eligible entity and building owner, if different.

7. List the installation incentives the Tribe will provide eligible entity representatives for each eligible product or service up to \$500 (in total per project).

Note: Eligible entity representatives (governmental, commercial, or nonprofit) that install qualifying upgrades shall receive an incentive payment in addition to the available rebate. Tribes must provide meaningful installation incentives that reflect the scale of the upgrades installed. Incentives cannot exceed \$500 (in total per project). Tribes may not eliminate the requirement to provide a contractor incentive.

8. Confirm that the Tribe will inform all contractors, other eligible entity representatives, households, and building owners participating in the rebate program that eligible entities cannot receive multiple federal rebates or grants for the same Qualified Electrification Project (QEP).

☐ Yes, the Tribe confirms the above statement.

Section 3.1.3 Low-Income Households

9. Confirm that the Tribe will attach the following tenant protection requirements to rental property owners who claim rebates for at least two years following the receipt of the rebates by the owner of the tenant-occupied building:

- The owner agrees to rent the dwelling unit to a low-income tenant.
- The owner agrees not to evict a tenant to obtain higher rent tenants based upon the improvements.

³ The term “eligible entity representative” comes from the underlying IRA Section 50122 statute. The term is defined in the [Program Requirements and Application Instructions](#) as “A governmental, commercial, or nonprofit entity carrying out a qualified project on behalf of an eligible entity.”

- The owner agrees not to increase the rent of any tenant of the building as a result of the energy improvements, with exception of increases to recover actual property tax increases or justified operating and maintenance cost increases.
 - The owner agrees to provide tenants with written notice of their rights and their building owner's obligations that are listed here within 30 days of receiving the rebate.
 - In the event the owner does not comply, the owner must refund the rebate.
- ☐ Yes, the Tribe confirms the above statement.

Section 3.1.4 Qualified Electrification Projects

10. Confirm that the Tribe will verify that rebates are provided only for qualified electrification projects, including that each of the following conditions are met for each project:

- Project includes the purchase and installation of a qualifying product, as described in [Program Notice 26-3](#) and Section 3.1.4 of the [Program Requirements & Application Instructions](#) document
- The installation occurs at a single-family home or eligible multifamily building

Note: [Program Notice 26-3](#) Section 3.3 removes program allowances for upgrades for fuel-switching (i.e., replacement of non-electric appliances) and instead allows rebates for upgrading HVAC and appliances only from existing electric equipment to more efficient electric equipment. HVAC and electric appliances in new construction continue to be allowable. Program Notice 26-3 also allows dwellings to retain existing fossil-fuel HVAC systems when installing a heat pump, even if the heat pump will not become the primary source of heating and cooling.

☐ Yes, the Tribe confirms the above statement.

11. Confirm that ENERGY STAR certification will be required for all rebated products, if applicable. If the Tribe decides to seek approval for alternative standards, confirm that the Tribe will provide detailed justification for proposed deviations from ENERGY STAR certification and will not use these alternatives unless they are approved by DOE.

Note: DOE can grant approvals to Tribes to use an alternative approach to ENERGY STAR certification in certain situations, such as when ENERGY STAR certification does not exist for a product category. To receive approval, a Tribe must submit a request to DOE that includes the product category, the rationale for a deviation, the proposed alternative efficiency criteria/standard, and their plan to verify the performance of products to that alternative standard. Such exemptions typically require that the exempted product achieves a similar level of performance to ENERGY STAR, are granted for a limited period (up to one year), and will be

revoked if ENERGY STAR products for that appliance category become available to the Tribe.

If a Tribe wants to request approval for an alternative to ENERGY STAR, it should provide DOE with the information specified in the “Requesting Alternatives to ENERGY STAR for HEEHR” program support resource. DOE recommends that a Tribe submit this request for an alternative to ENERGY STAR separately and at a later time than this application narrative, as it is not required for narrative approval and could slow review of this application and subsequent approval of a full funding award for the Tribe.

☐ The Tribe confirms that ENERGY STAR certification will be required for all rebated products, if applicable. If the Tribe decides to seek approval to use alternative efficiency standards (non-ENERGY STAR) for select products, the Tribe will provide its list of product categories, rationale for a deviation, proposed alternative efficiency criteria, and verification of program requirements for DOE to review.

12. Describe how the Tribe will collect and retain documentation to demonstrate how each criterion in Section 3.1.4 of the [Program Requirements & Application Instructions](#) document and [Program Notice 26-3](#) was met for each installation.

☐ Defer response to Tribal Implementation Blueprint.

13. For eligible new construction rebates, describe the required documentation to confirm that the eligible entity representative and eligible entity ensure operational and consumer cost effectiveness.

Note: [Program Notice 26-3](#) Section 3.3 requires for eligible new construction rebates that the eligible entity representative and eligible entity must ensure operational and cost effectiveness.

☐ Defer response to Tribal Implementation Blueprint.

☐ N/A. The Tribe does not plan to offer rebates for new construction.

14. For existing homes receiving a heat pump upgrade, specify what level of insulation and air sealing is required such that a home does not need to utilize rebates for insulation and air sealing prior to installing a heat pump.

Note: [Program Notice 26-3](#) Section 3.3 requires that homes utilize rebates for insulation and air sealing prior to installing heating and cooling upgrades, unless they are already appropriately insulated and sealed to a DOE approved, Tribally specified level, to ensure upgrades do not increase consumer energy costs.

☐ Defer response to Tribal Implementation Blueprint.

☐ N/A. The Tribe will not provide HEEHR rebates for heating and cooling upgrades.

15. For existing homes receiving ventilation upgrades, describe how the Tribe will verify that ventilation materials are eligible only if homes also receive air sealing services or otherwise achieve low air leakage rates.

Note: Eligible ventilation materials include ENERGY STAR-certified range hoods and in-line (single and multi-port), bathroom, and utility room fans. Products must be installed in the configuration certified by ENERGY STAR. A range hood that is installed such that the exhaust air is recirculated into the dwelling unit is not eligible to receive rebates.

☐ Defer response to Tribal Implementation Blueprint.

☐ N/A. The Tribe will not provide rebates for materials to improve ventilation.

Section 3.1.6 Processing and Delivering Rebate Funds to Eligible Rebate Recipients

16. Describe what types of systems will be put into place to allow effective processing of rebates, including ensuring the ability to apply rebates at point of sale and/or as part of an invoice. Confirm that the system will link to the DOE's federal database through regular data submissions (check all that apply):

☐ Yes, the system will link to the federally provided system via real-time connection to the API. *[Note by checking this box, the Tribe is agreeing to report data elements in accordance with the State and Territory Data and Tools Requirements Guide⁴ as there is no Tribal specific real-time connection associated with the Tribal specific reporting elements documented in the [Program Requirements & Application Instructions](#)].*

⁴ Information about API reporting can be found here: <https://www.pnnl.gov/projects/rebate-tools>

- ☐ Yes, the system will link to the federal provided system via after-the-fact reporting via API endpoint.
- ☐ Yes, information will be submitted via DOE-provided spreadsheet template.
- ☐ Defer response to Tribal Implementation Blueprint.

17. Identify whether the Tribe will implement mail-in rebates for each, or any, qualified project category in addition to the point-of-sale pathway for the same qualified project category or categories. If yes, describe the systems that will be used for processing mail-in rebates.

Note: [Program Notice 26-3](#) Section 3.5.3 expands flexibility to implement mail-in rebates in addition to the grantee's statutory point-of-sale rebate retail pathway for each qualified project category.

- ☐ Defer response to Tribal Implementation Blueprint.
- ☐ Yes, the Tribe will implement mail-in rebates in addition to point-of-sale incentives. Describe systems below.
- ☐ No, the Tribe will not implement mail-in rebates and will only provide point-of-sale rebates.

18. Describe how the Tribe will ensure processing of rebates within 12 weeks of receipt (e.g., through a processing company, through program implementers, or other entities or methods), subject to exceptions for barge or air shipment, equipment availability, and for projects involving large multifamily properties. Include information on corrective actions that the Tribe will implement in the event of lengthier processing times.

- ☐ Defer response to Tribal Implementation Blueprint.

Section 3.1.7 Verify Income Eligibility

Note: Low-income households are defined as households with less than 80% Area Median Income (AMI). HUD calculates median family income levels for areas across the U.S. HUD

has a website available [here](#) where users can view these calculations. Information about HUD's methods for calculating AMI statistics is available [here](#). HUD typically updates these values in March or April of each year. (See the [Program Requirements & Application Instructions](#) document Section 2.1.)

19. For single-family households (including upgrades for individual dwelling units within a multifamily building), describe what combination of methods will be used for claimants to be able to establish their household income for income qualification.

Note: [Program Notice 26-3](#) changed the requirements for self-attestation. If self-attestation is allowed for a household to initially apply for a rebate, Tribes must verify all rebate applications using self-attestation of income eligibility before issuing a rebate payment. In cases of emergency replacements, Tribes may verify income eligibility for households using self-attestation after a rebate payment is issued.

Tribes may select from the following options:

- ☐ Documentation of household income (for example, 1040)
- ☐ Documentation of enrollment in a pre-qualifying program
- ☐ Self-attestation of enrollment in a pre-qualifying program for initial application, with verification before a rebate payment is issued
- ☐ Self-attestation of income level for initial application, with verification by another income-eligibility method before a rebate payment is issued
- ☐ Defer response to Tribal Implementation Blueprint.

20. For multifamily building whole building or central upgrade projects, describe what combination of methods will be used to verify that at least 50% of the occupied dwelling units consist of households with incomes less than 80% AMI and to verify that at least 50% of the occupied dwelling units consist of households with incomes less than 150% AMI.

Note: [Program Notice 26-3](#) Section 3.5.2 clarifies that rebate eligibility for multifamily properties is not less than 50% of the occupied dwelling units having low-income or moderate-income households, based on area median income levels. [Program Notice 26-3](#) Section 3.5.2 also expands the definition of multifamily buildings to also include multiple buildings (e.g., apartment complexes).

- ☐ Defer response to Tribal Implementation Blueprint.

21. Confirm the following:

- Claimant will be required to note the number of individuals who occupy the dwelling unit.
- Claimant will be required to sign a statement attesting to the validity of all information provided (e.g., enrollment documents, household income, number of full-time occupants) irrespective of the method of income qualification (e.g., categorical eligibility, self-attestation).
- Tribe's intake system for users to provide income information will compare household income to 80% and 150% AMI values associated with that household's county and household size to determine rebate levels prior to signing statements regarding their income.

☐ Yes, the Tribe confirms the above statements.

22. If not planning to rely on the federally provided address-service API to keep the 80% AMI and 150% AMI levels for each location up to date, explain how the Tribe will keep the levels up to date.

☐ Defer response to Tribal Implementation Blueprint.

☐ The Tribe will use a federally provided address-service API from DOE to keep its 80% AMI and 150% AMI levels up to date.

☐ The Tribe will verify income entirely through categorical eligibility methods, and therefore the Tribe will not need to compare household incomes to 80% and 150% AMI levels.

☐ The Tribe will use a different system to keep its 80% AMI and 150% AMI levels up to date. More information on the Tribe's approach is included in the box below.

Confirm that these levels will correspond to:

- The address of the home at which rebates will be applied
 - The applicable number of household occupants
- ☐ Yes, the Tribe confirms the above statements.

23. Confirm that the Tribe will do the following:

- Review information provided to support income eligibility for all applicants applying for rebates.
☐ Yes, the Tribe confirms the above statement.
- Take steps to verify income eligibility for all applications (100%) that use self-attestation to support income eligibility (e.g., confirm enrollment in at least one program that the applicant asserted enrollment in; confirm household income via IRS confirmation through the Income Verification Express Service (IVES) tool, if available; calls to employers; or other methods as applicable).
☐ Yes, the Tribe confirms the above statement.
- Each time applicants receive rebates and are subsequently found to not meet eligibility requirements, report to DOE within 30 days of discovery of the issue and explain how the Tribe will resolve the problem.
☐ Yes, the Tribe confirms the above statement.

24. Identify how the Tribe will resolve instances when rebates are provided to those who have falsified their incomes.

- ☐ Defer response to Tribal Implementation Blueprint.

25. If proposing to allow self-attestation as a means for initial income qualification, provide a detailed description of how and when this approach will be used. Include statements, language, and detailed information regarding follow-up steps that will be used for this process. Additional topics to address include:

- Describe how those applying for rebates will be warned of potential liability associated with falsifying information.
- Explain how signed statements of self-attestation will be securely stored.
- Identify what level of falsified attestations will signal that the system needs to shut down either permanently or be restarted only after sufficient improvements.

- ☐ Defer response to Tribal Implementation Blueprint.

- ☐ N/A. The Tribe has chosen not to allow self-attestation.

26. Describe how the Tribal program will verify, where applicable, that at least one member of a household has been enrolled in a program within the Federal Programs Approved for Categorical Eligibility document, or other programs proposed by the Tribe and approved by DOE, within the prior 12 months.

☐ Defer response to Tribal Implementation Blueprint.

27. If applicable, propose any additional federal and other programs to be considered for categorical eligibility. For any programs not already approved, describe how the program's eligibility aligns with the Section 50122 income requirements (Section 3.1.7 of the [Program Requirements & Application Instructions](#) document).

☐ N/A. The Tribe will not propose additional federal or other programs to be considered for categorical eligibility.

☐ Defer response to Tribal Implementation Blueprint.

28. Identify whether the Tribe requests authorization to allow use of categorical eligibility determinations based on program participation outside of a one-year period (e.g., proof of enrollment within the past 12 months).

☐ Yes, the Tribe requests authorization to allow use of categorical eligibility determinations based on program participation outside of a one-year period.

☐ No, the Tribe will only allow for categorical eligibility determinations based on program participation within a one-year period.

☐ Defer response to Tribal Implementation Blueprint.

If yes, explain the Tribe's proposal and describe the rationale.

Section 3.1.8 Data Collection and Evaluation

29. Confirm that the Tribe will collect required data listed in Section 3.1.8 of the [Program Requirements & Application Instructions](#) document.

☐ Yes, the Tribe confirms the above statement.

Consumer Experience

Section 3.2.2 Fraud, Waste, and Abuse Mitigation

30. Confirm that the Tribe will prepare and implement a Fraud, Waste, and Abuse Mitigation Plan in accordance with the requirements in Section 3.2.2 of the [Program Requirements & Application Instructions](#) and [Program Notice 26-3](#). While DOE recommends incorporating all elements into their Fraud, Waste, and Abuse Mitigation Plan as listed in Section 3.2.2., Indian Tribes with a funding allocation below \$1 million are only required to create a plan incorporating the requirements included in the “Data Review,” “Virtual Inspection,” and “Contractors and Other Partners” sections.

Note: A Tribe must prepare and submit a Fraud, Waste, and Abuse Mitigation Plan to DOE for review and approval at least 90 days before their intended program launch as part of the Tribal Implementation Blueprint.

☐ Yes, the Tribe confirms the above statement.

Please add your name, title, signature, and date.

Name (printed)

Organization and Title

Signature

Date

For more information, visit: energy.gov/cmei/scep/home-energy-rebates-program

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