



DENVER

CLIMATE ACTION, SUSTAINABILITY & RESILIENCY

HOME ENERGY REBATE: PROCESS MANUAL

Version
1.5

Version	Date	Comments
1.1	Feb 24 2023	Minor edits for external release and added product check list
1.2	March 10 2023	Edits by the City and added presentation slides
1.3	Aug 29 2023	Update SEER2 ratings for ASHP and MSHPs and AHRI Pre-application review
1.4	Mar 12 2024	Update Screenshots, added new processes
1.5	April 14 2024	Update License Requirements for ASHPs, MSHPs, GSHPs

Program Introduction

The Denver CARE Rebate Program is a program designed to reduce out of pocket expenses for Denver Residents to electrify their homes by providing rebates as an up-front discount. Contractors must be registered with the program in order to participate and are responsible for submitting applications and all required documentation through the program portal. Contractors submit applications for pre-approval before the work begins to reserve rebate funding and ensures the project meets the requirements of the program. The program team reviews all applications within 10 business days. Once an application has been approved the contractor has 90 days to complete the works work (or in the case of a solar project 120 days). Contractors provide any Denver CARE rebates as a point of sale discount to the Denver Resident. Once approved the rebate amount will be reimbursed to the contractor. Upon completion contractors submit required documents and project information as a payment request through the portal. The program team reviews all payment requests within 10 business days. If you have any questions about the program, the portal, or rebates do not hesitate to contact us at DenverRebate@aptim.com or call 833-612-0622 Option 1.

Contents

Contractor Sign-in and Registration Processes.....	3
Adding A License.....	7
Submitting Applications.....	12
Tracking Applications.....	22
Application Status Definitions	23
Withdraw an Application.....	23
Requesting a Contract Extension	23
Requesting Payments	26
Other Rebate(s) in Payment Request	29
Tracking Payment Requests.....	30
Payment Request Status Definitions.....	31
Tracking Approved Payments.....	31
How to Edit a Payment Request.....	31
How to Change the Equipment on Payment Request.....	32
How to Edit an Application	33
Contact Information	37
Appendix A: Application Requirements by Product Check List	38
Appendix B: Contractor Portal Training January 5 th , 2023.....	46

Contractor Sign-in and Registration Processes

1. Navigate to the portal via the link: [Home \(denverhomeenergy.apitim.com\)](https://denverhomeenergy.apitim.com).

Application Process



Pre-Approval

Before any work begins, you will submit an application to get the rebate funds reserved for your project. Contractors will give the rebates to the customer as a **point-of-sale** discount on the proposal and invoice. You will be able to view your application and track the status on your "My Applications" page.



Review

Your application will be reviewed within 14 days. We will either approve your application, reserving the funds for your project, or we will reach out to you if we need any additional information.



Decision

Now that your application has been approved. You will move forward with completing your project. You will also collect all the required documentation needed to submit your payment request.



Request Payment

Once your project is complete and you have all of the required documentation, you will submit your payment request. Your payment request will be reviewed within 14 days. We will either reach out to you requesting additional information or we will approve your payment request and you will receive your rebate payment. Your payments status can be checked in the portal on your "My Payments" page.

2. Select the Program.

Programs

Below is the list of the new programs recently available for registration.

[Go to All Programs](#)

Home Energy

The city is incentivizing the deployment of efficient, all-electric energy equipment for Denver residents.

Total Allocated Amount: \$3,600,000.00
Total Requested: \$176,280.00

Renewables

Denver's Office of Climate Action, Sustainability, Resiliency (CASR)'s Renewables Program offers rebates on solar installations and battery storage.


Total Allocated Amount: \$1,000,000.00
Total Requested: \$13,822.00

EV Charging

The CARe program offers two different EV Charging Rebates: a Level 2 EV Charging Home Wiring rebate and a Vehicle to Building (Bi-Directional) EV Charger rebate.

Total Allocated Amount: \$200,000.00
Total Requested: \$9,950.00

3. Review the details, key dates, and Special Notes about the Program selected.



[Select Language](#)
Powered by Onipix Team

🏠
Programs
FAQ
Sign In

EV Charging

Introduction

Level 1 charging cables can take a while if you own an electric vehicle. EV owners interested in charging up faster can consider installing a Level 2 charger at their home. The EV Charging Home Wiring Rebate provides up to \$1,000 to assist with installing either an Energy Star Certified Level 2 EV Charger or a home Tesla charger.

You can use any licensed electrician to install this equipment as long as they are registered with the Climate Action Rebate program. If you are interested in renting an EV charger from Xcel and using our rebate to cover installation and wiring costs, you can sign up to participate in Xcel's EV Accelerate at Home program.

Start date: January 01, 2023
End date: December 31, 2023

Special Notes:

The CARe program offers two different EV Charging Rebates: a Level 2 EV Charging Home Wiring rebate and a Vehicle to Building (Bi-Directional) EV Charger rebate.

- If you are not already signed in, you will be prompted to 'Sign In' as an existing user or 'Sign Up' as a new user.

End date: December 31, 2023

Special Notes:
The CARE program offers two different EV Charging Rebates: a Level 2 EV Charging Home Wiring rebate and a Vehicle to Building (Bi-Directional) EV Charger rebate.

Registration for this program requires you to sign in. If you do not have an account please sign up.

[Sign Up](#) [Sign In](#)

Application Steps

Average Processing Time: 14 days

Applicant Information Provide and/or verify your details.	Program requirements & Documents Fill out the detail required and upload any documents that may be required as part of the application.	Acknowledgement Acknowledge that all information provided is truthful and accurate and submit your application.	Review Application Review your submitted application.
---	---	---	---

- Assuming a new user, after clicking 'Sign Up', enter your preferred email and password. Please note that as of right now each contractor is only allowed one sign on. It may be beneficial to use a group email address if more than one person will be entering applications.

The screenshot shows the Denver Climate Action Sustainability & Resiliency website. At the top left is the logo. At the top right are navigation links: Home, Programs, FAQ, and Sign In. Below the navigation is a 'Sign in' link and a yellow 'Sign Up' button. To the right of the 'Sign Up' button is a 'Redeem invitation' link. Below these links is the heading 'Register for a new local account'. There are three input fields: 'Email' with the value 'stralhoccare+1550@gmail.com', 'Password', and 'Confirm password'. A yellow 'Register' button is at the bottom of the form.

- Click 'Register'.

This screenshot is identical to the previous one, showing the registration form. The 'Register' button is highlighted with a yellow box, indicating it has been clicked.

7. Complete the Profile (this creates your Contact record) and click 'Next'.

The screenshot shows the Denver Climate Action Sustainability & Resiliency portal. The user is logged in as 'Roberta Nottingham'. The page title is 'Home > Profile'. The main content area is titled 'Profile' and contains a message: 'Please provide the required fields below to complete your portal user account and click Update to continue.' Below this message is a 'Profile Instructions' dropdown menu set to 'Unverified'. A navigation bar includes 'Profile', 'Summary', 'Address', 'Licenses', 'Tax Info', and 'Payment'. The 'Profile' tab is active, showing fields for 'First name', 'Last name', 'E-mail', 'Mobile Phone', and 'Business Phone'. There are also checkboxes for 'Would you like to receive status updates and information via email?' and 'Would you like to receive status updates and information via text message?'. A 'Next' button is located at the bottom of the form.

8. Complete the Summary (this creates the Account record) and click 'Next'.

The screenshot shows the Denver Climate Action Sustainability & Resiliency portal. The user is logged in as 'Roberta Nottingham'. The page title is 'Home > Profile'. The main content area is titled 'Profile' and contains a message: 'Please provide the required fields below to complete your portal user account and click Update to continue.' Below this message is a 'Profile Instructions' dropdown menu set to 'Unverified'. A navigation bar includes 'Profile', 'Summary', 'Address', 'Licenses', 'Tax Info', and 'Payment'. The 'Summary' tab is active, showing fields for 'Company Legal Name', 'Company Doing Business As (DBA)', 'Phone', and 'Website'. There are also 'Previous' and 'Next' buttons at the bottom of the form.

9. Complete the Business Address and Mailing Address and click 'Next'.

Denver CLIMATE ACTION, SUSTAINABILITY & RESILIENCY

Home > Profile

Roberta Nottingham

Please provide the required fields below to complete your portal user account and click Update to continue.

Profile Instructions

Unverified

Profile ✓ Summary ✓ **Address** Licenses Tax Info Payment

Business Address

Street 1 * Street 2 (Ste, Apt, etc.)

City State/Province

County ZIP Code

Mailing Address

Same as Business Address

No Yes

Previous Next

10. Notice as you begin to type in the Street 1, a USPS Validated address typeahead displays. For the Business Address and Mailing Address, these are not restrictive to the Program's geolocation parameters for Project Sites. Please note that if there is a unit or suite number the address may display a note "Click to Expand" in the pop-up address.

Profile ✓ Summary ✓ **Address** Licenses Tax Info Payment

Business Address

Street 1 * Street 2 (Ste, Apt, etc.)

1000

1000 Baybrook Mall # 1098 Friendswood, TX 77546

1000 Bolivar Point Ln Friendswood, TX 77546

1000 Knoll Bridge Ln Friendswood, TX 77546

1000 Majestic Ln Friendswood, TX 77546


1000 Manison Pkwy # 1000 Friendswood, TX 77546

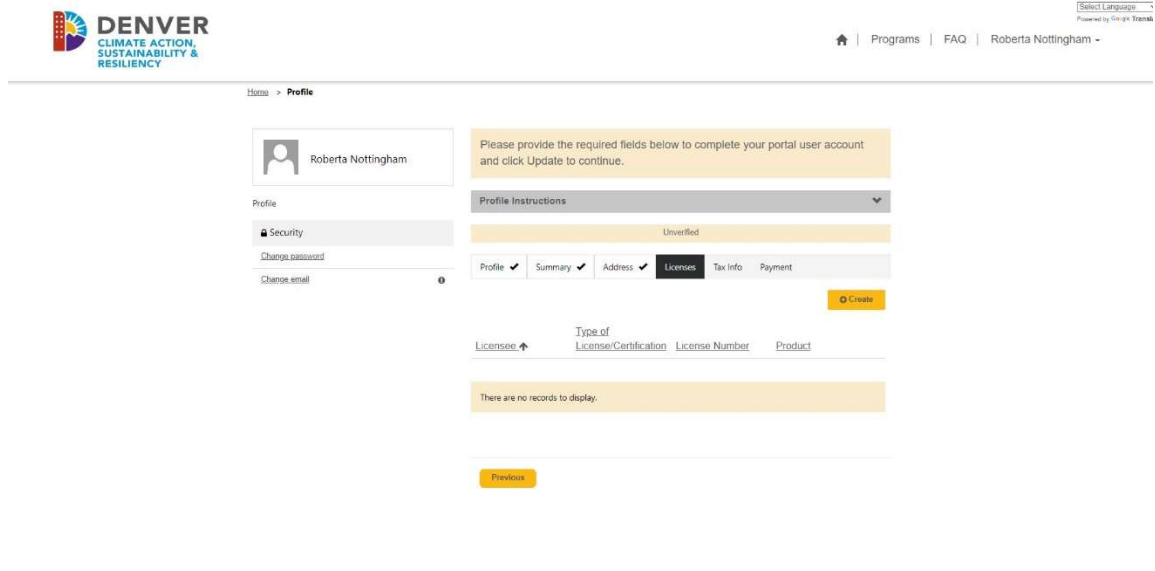
1000 Manison Pkwy Friendswood, TX 77546

1000 Pine Cone Ln Friendswood, TX 77546

1000 Pine Hurst Ct # 1000 Friendswood, TX 77546

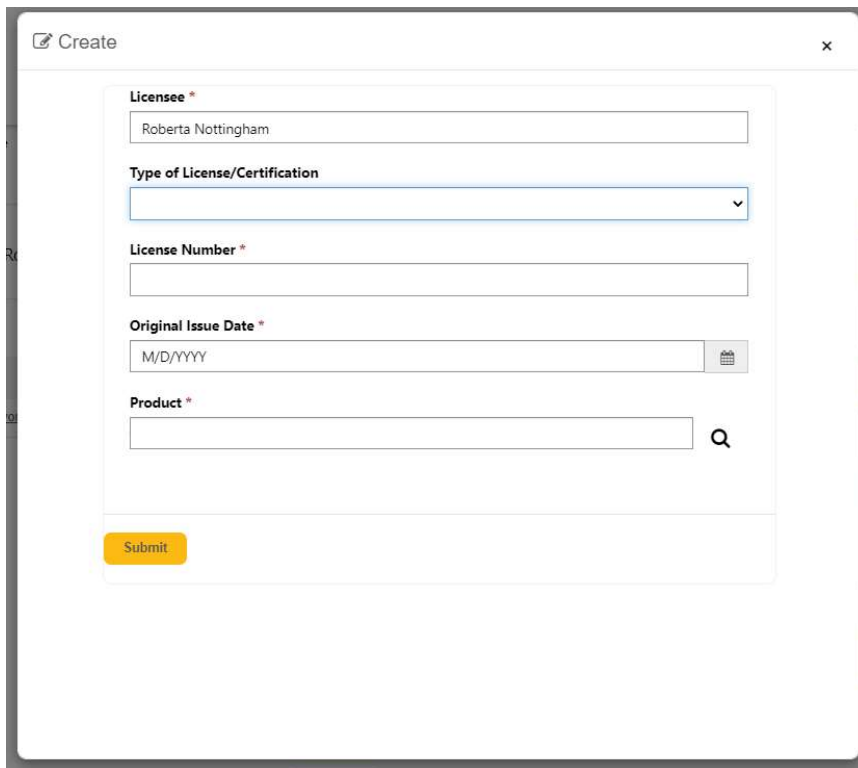
1000 Pine Hurst Ct Friendswood, TX 77546

11. Add Licenses, Certifications and Trade Partner numbers by clicking the  button.



12. A new dialog box will display to enter in the License information. Make sure to add all licenses and all products you intend on installing and applying rebates for in the future – once complete, click 'Submit'.

Note that a new license will need to be created for each type of equipment, where applicable.



To apply for rebates for the following products you **MUST** be an Xcel Registered Trade Partner and have an H&VA(or B) and Refrigeration A (or B) license, OR an HVAC license through the City of Denver. Please enter the license type for **EACH** product you intend to apply for. Please enter the license type ("H&VA(or B) and Refrigeration A (or B)" OR "HVAC") in the box labeled "License Number".

- Air Source Heat Pump (High Efficiency)
- Air Source Heat Pump (Cold Climate)
- Ground Source Heat Pump
- Mini-Split Heat Pump
- Mini-Split Heat Pump (Cold Climate)

Note: Mini-Split Heat Pump and Heat Pump Water Heater rebates are available from any Xcel Energy registered Trade Partner, not just those on the customer-facing list. The list is updated monthly with trade partners who have installed a MSHP and/or HPWH system and helped a customer receive a MSHP and/or HPWH rebate for that system. Contractors participating in Air-Source Heat Pump and Ground Source Heat Pump programs have additional requirements. Visit Xcel Energy's Residential Trade Partner Resource Center for more information.

<https://co.my.xcelenergy.com/s/partner-resources/trade/residential-trade-partners>

To apply for rebates for the following products you **MUST** have a valid **State of Colorado License Number** and enter that license information for **EACH** product you intend to apply for.

- Solar
- EV Charger
- V2B/Bidirectional EV Charging
- Electric Service Upgrade
- Battery Storage
- Battery Storage (Alone)
- Heat Pump Water Heater (High Efficiency)
- Heat Pump Water Heater (Smart)

13. Click 'Next' once all licenses are added.

Home > Profile

[Select Language](#)
Powered by Bright 1

DENVER
CLIMATE ACTION,
SUSTAINABILITY &
RESILIENCY

Roberta Nottingham

Profile

Security

[Change password](#)

[Change email](#)

Please provide the required fields below to complete your portal user account and click Update to continue.

Profile Instructions

Unverified

Profile ✓ Summary ✓ Address ✓ Licenses Tax Info Payment


[Create](#)

Licensee	Type of License/Certification	License Number	Product
Roberta Nottingham	Certified Electrician	0202020200	Solar (per kW)
Roberta Nottingham	Certified Electrician	84866520	Battery Storage

[Previous](#)
[Next](#)

14. Enter in Tax Information- Based on the selection, conditional fields will display to capture more information.

The screenshot shows the user profile page for Roberta Nottingham. The page is titled 'Profile' and includes a 'Security' section with links for 'Change password' and 'Change email'. A 'Tax Information' section is visible, with a dropdown menu for 'Tax Identification Type' and a 'Federal Tax Classification' dropdown. A 'W-9 (1 remaining)' upload icon is present at the bottom of the form.

15. Upload a signed W-9 by clicking the  upload icon, select your file, and click 'Upload'. The system will auto create a document name. Documents must either be a PDF, Word or JPEG.

The screenshot shows the 'Document Upload' dialog box. The dialog box has a title bar that says 'W-9 (1 remaining)'. The main content area contains the text 'Document Upload', 'Document Name (Type .docx)', 'Nottingham Electric, LLC_W9_8454', and 'Document Type: W-9'. There are two buttons at the bottom: 'Cancel' and 'Upload'.

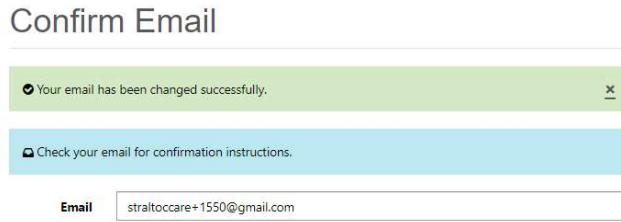
16. Click 'Next' to advance.
17. Enter in your preferred Method of Payment. If you select ACH/Direct Deposit someone from the program will reach out to set up that payment method, your first payment may however be by check. If your profile is complete, click 'Submit' – otherwise you can click 'Back' at any time to go back to another section to change any information.

18. Once submitted, the program team will review your account and verify it once we have all of the information we need. You will now be redirected to the Programs page.
19. First time registrants are required to verify their email by selecting the Program you wish to apply to and click within the message to verify your email address.

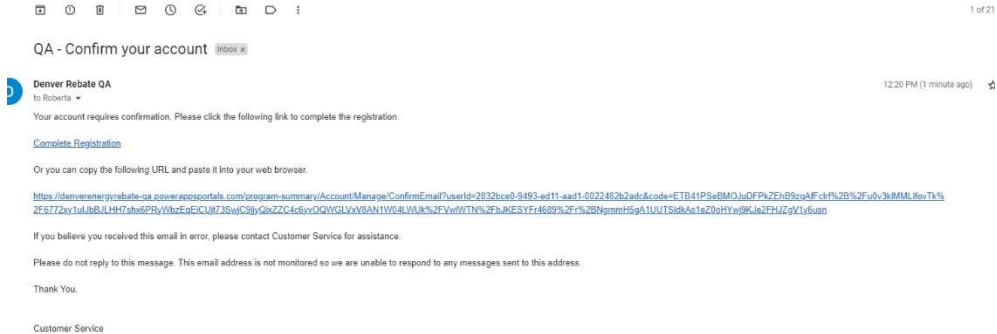
You must verify your email address before you can start registering for programs. Please click [here](#) to confirm your email address. Confirming your email address will also enable Two Factor Authentication making your account even more secured.

20. This routes you to confirm the email address, click 'Change and confirm email' to send the confirmation email for verification. This enables the portals two-factor authentication.

21. Check your email for further instructions.



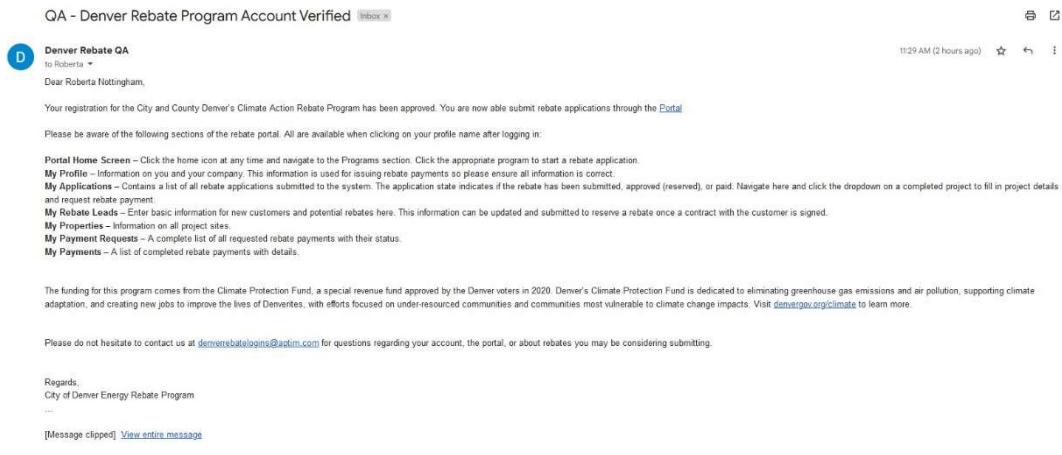
22. Click the link in the email or copy and paste into a URL to confirm your account.



23. Following the confirmation of your account, you may attempt to apply for the program again, however, your account must be reviewed and authorized prior to applying. If your account is not verified, you will see this message at the Program level. Aptim’s goal is to review registration in three business days or less.

Please give us up to 3 days to review your registration. You will not be able to submit rebate applications until your registration has been approved. You can contact us at denverrebatelogins@aptim.com with any questions.

24. Once your account is verified you will receive an email identifying that your registration has been approved.



Important: If you change details on your profile or just cycle through the screens will cause your profile to be unverified. This is to ensure any potential changes you made do not disqualify your ability to participate.

Submitting Applications

1. From the Portal, once you are signed in, select the Program tile to view more information about the Program. All applications MUST be submitted BEFORE any work begins.



Select Language
Powered by 5e1g

Home | Programs | FAQ | Roberta Nottingham -

Programs

Listed below are all the programs available. Click on a program to view more details and/or apply.

Search Programs

<h3>Home Energy</h3> <p>The city is incentivizing the deployment of efficient, all-electric energy equipment for Denver residents.</p> <p>Total Allocated Amount: \$3,600,000.00 Total Requested: \$194,180.00</p>	<h3>Renewables</h3> <p>Denver's Office of Climate Action, Sustainability, Resiliency (CASR)'s Renewables Program offers rebates on solar installations and battery storage.</p> <p>Total Allocated Amount: \$1,000,000.00 Total Requested: \$9,322.00</p>	<h3>EV Charging</h3> <p>The CARE program offers two different EV Charging Rebates: a Level 2 EV Charging Home Wiring rebate and a Vehicle to Building (Bi-Directional) EV Charger rebate.</p> <p>Total Allocated Amount: \$200,000.00 Total Requested: \$13,150.00</p>
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2. You can see a more detailed description of the Program, the Start and End Date, as well as any Special Notes. Click the 'Apply Now' button to begin the application process.
Note: All application must be submitted BEFORE the work begins.



Select Language
Powered by 5e1g

Home | Programs | FAQ | Roberta Nottingham -

Renewables

Introduction

Denver as an electricity consumer is nested within Xcel Energy and the broader Colorado electric system. Denver's renewable vision is to enable a rapid and equitable transition to a 100% renewable electric system in Colorado. By 2030, 100% of Denver's community-wide electricity use will contribute to this vision.

The above vision and 2030 goal for Denver's electricity use to "contribute to" a 100% renewable electricity system is unique compared to goals to be "powered by" 100% renewable electricity. This is due to accounting protocols for Renewable Energy Credits (RECs). RECs measure renewable energy production and are "retired" to meet renewable energy goals.

Start date: January 01, 2023
End date: December 31, 2023

Special Notes:

Denver's Office of Climate Action, Sustainability, Resiliency (CASR)'s Renewables Program offers rebates on solar installations and battery storage.

[Apply Now](#)

- Select the Application Type and click 'Create'. Note currently for the City and County of Denver there is only one Application Type, a Contractor submitted application.

Start Registration

Program *
Renewables

Application Type *
Contractor

Close Create

- Pre-Approval details begin with the Contractor Information. If there are no changes, click Save & Next to move to the next page, or you can just click Save to save the information. Note that changing contractor information will change the information on your registration and will trigger your registration to be unverified.

Pre-Approval Details

Overview:

Pre-Approval Name: Marc Roz - EV Charging - Contractor	Pre-Approval Status: Draft
Program EV Charging	Pre-Approval Type Contractor
Application ID: AID-001648	

Pre-Approval Instructions

<p>Pre-Approval Steps</p> <ul style="list-style-type: none"> Contractor Information Add Project Site Program Requirements Rebate Leads Acknowledgement Submit Pre-Approval 	<p style="text-align: right;">Step 1 of 6</p> <p>Contractor Information</p> <p>First name * Marc</p> <p>Last name * Roz</p> <p>E-mail * denverrebate@aptim.com</p> <p>Mobile Phone (555) 555-5555</p> <p>Business Phone (555) 555-5555</p> <p><input checked="" type="checkbox"/> Verified</p> <p>I would like to receive news and offers from this facility via text <input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow</p> <p style="text-align: right;">Save Save & Next</p>
--	--

5. Add the Project Site by clicking the **Create** button or click the **Add Existing Property** button to add an Existing Property address you may have added under a different Program and application.

Pre-Approval Details

Overview:

Pre-Approval Name: Marc Roz - EV Charging - Contractor	Pre-Approval Status: Draft
Program EV Charging	Pre-Approval Type Contractor
Application ID: AID-001648	

Pre-Approval Instructions

Pre-Approval Steps

- Contractor Information
- Add Project Site
- Program Requirements
- Rebate Leads
- Acknowledgement
- Submit Pre-Approval

Add Project Site
Step 2 of 6

Properties

Create Add Existing Property

Name ↑	Application	Property
There are no records to display.		

Back
Save & Next

6. As you begin to fill in the Address Line 1, matching addresses within the geolocation boundary for the Program's parameters will display. Please note that if there is a unit or suite number the address may display a note "Click to Expand" in the pop-up address.

Create
×

Project Site

Address Line 1

5800 Boston St Denver, CO 80238

5800 Brighton Blvd Commerce City, CO 80022

5800 E 13th Ave Denver, CO 80220

5800 E 17th Avenue Pkwy Denver, CO 80220

5800 E 22nd Ave Denver, CO 80207

5800 E 36th Ave Denver, CO 80207

5800 E 3rd Ave Denver, CO 80220

5800 E 58th Ave Commerce City, CO 80022

5800 E 58th Ave Ste (8 more entries click to expand) Commerce City, CO 80022

5800 E 64th Ave Commerce City, CO 80022

Address Line 2

City *

State *

7. Select the appropriate address for the remaining address fields from the suggested list to populate based on your selection. These are valid USPS addresses.
8. Enter in the Homeowner Name, the Homeowner Email, and Homeowner Phone Number.

The screenshot shows a web form titled "Project Site" within a "Create" modal window. The form contains the following fields and their values:

- Address Line 1:** 5800 E 58th Ave
- Address Line 2:** Ste C
- City *:** Commerce City
- State *:** CO
- Zip Code *:** 80022
- County:** Adams
- Homeowner Name *:** (empty field)
- Homeowner Email:** (empty field)
- Homeowner Phone Number:** (empty field)

Below the Homeowner Name field, there is a note: "Please provide either an email or phone number for the homeowner." Below the Homeowner Phone Number field, there is a note: "Provide in format (000) 000-0000" and "Provide a telephone number".

9. If the Email and Phone Number is blank, you will receive an error message and will not be able to submit.

i The form could not be submitted for the following reasons:
[You must provide either an email or phone number for the homeowner.](#)

10. Click 'Submit' to add the Project Site.

Pre-Approval Details

Overview:

Pre-Approval Name:
Roberta Nottingham - Renewables - Contractor

Pre-Approval Status:
Draft

Program:
Renewables

Pre-Approval Type:
Contractor

Pre-Approval Instructions

Pre-Approval Steps

- Contractor Information
- Add Project Site**
- Program Requirements
- Rebate Leads
- Acknowledgement
- Submit Pre-Approval

Add Project Site Step 2 of 6

Create

Name ↑	Application	Property	
PRA-001177	Roberta Nottingham - Renewables - Contractor	5800 E 58th Ave Ste C Commerce City CO 80022	<input type="button" value="⊕"/>

Important: This Program does not permit multiple properties on the same application.

11. Answer any Program Requirement questions, which may be different across various Programs. Click 'Save & Next'.

- If you selected the Home Energy program, this step will ask for the Manual J Sizing but this is NOT required.
- Building type: Our program rebates are only for Single Family Dwellings, Duplex Dwellings, an Townhomes.
- Multifamily Dwellings and Condomiums are only eligible for EV Charger, Solar Rooftop, and Battery Storage rebates.
- AHRI Number: For heat pump projects you must enter the AHRI certificate number for the equipment that you plan on installing. The program team will review the AHRI information to verify if it meets the program requirements. Please review the equipment requirements listed on the FAQ page on the portal.

Pre-Approval Instructions

Pre-Approval Steps

- Contractor Information
- Add Project Site
- Program Requirements**
- Rebate Leads
- Acknowledgement
- Submit Pre-Approval

Program Requirements Step 3 of 6

1. Manual J Sizing - Upload Sizing Document for ASHP and Mini-Split Applications
2. What type of project is this? *
3. What is the building type where work is to be performed? *
4. For Heat Pump Equipment enter the AHRI or NEEP Certificate # and we will review upon pre-approval.

12. Enter in your Rebate Lead (Contract Information) by clicking the 'Add New Rebate Lead' button.

Pre-Approval Details

Overview:

Pre-Approval Name: Roberta Nottingham - Renewables - Contractor	Pre-Approval Status: Draft
Program Renewables	Pre-Approval Type Contractor

Pre-Approval Instructions

Pre-Approval Steps	Rebate Leads Step 4 of 6
Contractor Information	Add New Rebate Lead
Add Project Site	
Program Requirements	
Rebate Leads	
Acknowledgement	
Submit Pre-Approval	

Name	Estimated Contract Amount	Estimated Rebate Amount
There are no records to display.		

[Back](#) [Save & Next](#)

13. If the auto-populated Estimated Installation Start and End dates currently reflect your planned installation time frame then you can leave them as is. Otherwise we suggest giving your business plenty of time for the installation.

[Home](#) > [My Rebate Leads](#) > [Create Rebate Lead](#)

Create Rebate Lead

[Return to Application](#)

Provide your estimated installation start and end date, then click Create. After the rebate lead is created, click the Add Product button to select the product to be installed at the project site.

Estimated Installation Start Date *
<input type="text" value="1/23/2023"/> 
Estimated Installation End Date *
<input type="text" value="2/23/2023"/> 

[Create Lead](#)

14. Click 'Create Lead' to be able to add the Product(s) associated with this Rebate Lead.

- Click 'Add Product' button.

Edit Rebate Lead

Return to Application

Record created successfully. Please add related products.

Estimated Installation Start Date *
1/23/2023

Estimated Installation End Date *
2/23/2023

Measures

Add Product

Name	Contract	Property	Product	Max Rebate	Status
There are no records to display.					

- Add the Estimated Contract Amount (this should be the labor and material cost for the Product you are applying for only, not the entire contract amount). Click the drop-down arrow to select the Property (this will show properties associated with this application only). Click the drop-down arrow select the applicable Product, to find the Product you are applying for you may need to click to the next page. Click 'Save & Close'.

Edit

General

Estimated Product Cost Before Rebates *
\$ 3,000.00

Property *
201 W Colfax Ave Dept 601 Denver CO 80202

Product *
Air Source Heat Pump (High Efficiency)

Save & Close

- Add any additional Products for this Property by selecting 'Add Product' again. If the Product does not fall under the Program you are currently in, you will need to create a different application for that Product in the appropriate Program. The Estimated Rebate and Estimated Contract amounts will automatically calculate for you based on the predefined max rebate amounts per Product. Please pay attention to these values and make sure they match up with the rebate you have calculated on the proposal/contract.

Edit Rebate Lead

Record created successfully.

Estimated Installation Start Date *
2/26/2024

Estimated Installation End Date *
3/28/2024

Measures

Add Product

Name	Contract	Property	Product	Max Rebate	Status
CP-004702	CON-004276	201 W Colfax Ave Dept 601 Denver CO 80202	Air Source Heat Pump (High Efficiency)	\$1,500.00	Draft

Estimated Rebate Amount
\$1,200.00

Estimated Product(s) Cost
\$3,000.00

Contract with Homeowner
Required for all projects. Contract executed between the contractor and homeowner.
CON-004276_CNTRHO_142059.docx Uploaded on 2/26/2024, 2:21:01 PM

Recent Utility Bill
Required for all projects and must be dated within the last year.
CON-004276_RecentUtilityBill_142118.docx Uploaded on 2/26/2024, 2:21:19 PM

18. At this point you can click Return to Application and your application is just a Draft and rebate funds are not reserved. You can skip the following steps and come back later to add the required documents, acknowledge the T&Cs and submit the application for review. Only after you have completed these last steps and the application is reviewed will rebate funds be reserved.
19. Scroll down to find the area to upload documentation. Note to reserve rebate funds you must upload both a signed contract with the resident (the contract/ must have a line item deducting the calculated Denver CARE rebate from the project cost and label it as Denver CARE Rebate) and a recent utility bill (all pages). The system will auto name the documents.

[Add Product](#)

Name ↑	Contract	Property	Product	Max Rebate	Status	
CP-001663	CON-001602	201 W Colfax Ave Dept 101 Denver CO 80202	Air Source Heat Pump (High Efficiency)	\$1,500.00	Draft	

Estimated Rebate Amount	Estimated Contract Amount
\$1,500.00	\$10,000.00

Contract with Homeowner (1 remaining)

Upload the contract executed between the contractor and homeowner.

Recent Utility Bill (1 remaining)

Required for all projects and must be dated within the last year.

20. After you have uploaded the documents, click 'Save & Close'.
21. Click 'Save & Next' to go to the Acknowledgment screen.
22. Read the Acknowledgments prior to clicking the box and make sure you understand the information submitted will be verified prior to approval, and type in your Electronic Signature. Click 'Save & Next'.

Pre-Approval Details

Overview:

Pre-Approval Name: Roberta Nottingham - Renewables - Contractor	Pre-Approval Status: Draft
Program Renewables	Pre-Approval Type Contractor

Pre-Approval Instructions ▼

Pre-Approval Steps	Acknowledgement Step 5 of 6
--------------------	--

Contractor Information
Add Project Site
Program Requirements
Rebate Leads
Acknowledgement
Submit Pre-Approval

By checking the following agreement,

Eligibility:
This rebate program is available to residents of the City and County of Denver who install eligible equipment, as identified in the [Eligible Equipment List](#), purchased on or after January 1, 2023. Contractors can register projects on the resident's behalf before a contract has been signed with the resident to verify funding is available. After a contract has been signed with a resident contractors can submit a project for review, once the project has been approved rebate funds for the project will be reserved. Contractors will then have a set period of time to complete the project. Once the project has been completed, the contractor will complete and submit the rebate application and will be reimbursed upon application approval. For each discrete residential address as determined by Xcel Energy residential account number, one rebate application may be submitted per category of eligible equipment. Installation of eligible equipment and rebate application submission must be completed by an approved [participating contractors](#). Rebates will be paid directly to the approved participating contractor responsible for purchasing and installing the eligible equipment provided that the contractor provides a point-of-sale discount to the eligible residential customer.

Participation Requirements:
It is the responsibility of the purchaser of eligible equipment to assure that all requirements for the rebate are met. Failure to provide any of the required information will prevent processing of your application. Program procedures, requirements and rebate levels are subject to change or cancellation without notice and are subject to available program funds. Funding is available on a first-come, first-served basis until depleted or program end date of March 1, 2025. The rebate amount cannot exceed the purchase price of the equipment, nor can it include taxes or shipping costs. Please allow up to 4-6 weeks from the date all required application information is received for each covered product to process rebates.

Inspection:
The program reserves the right to conduct field inspections before rebate payment to verify purchase and, where necessary, installation of eligible equipment. Inspections will be scheduled in advance with the rebate applicant and residential customer. Applicant shall repay the full amount of the rebate in the event that the City and County of Denver or its consultant determines that at any time (a) the equipment was never installed at the address identified in this application, (b) the rebate was procured through intentionally misrepresented facts, or (3) the rebate was fraudulently obtained.

Liability:
The City and County of Denver, its appointed and elected officials, employees, affiliates, and agents assume no responsibility for the performance, quality, safety, operational capability, reliability, or any other aspect of design of the equipment or equipment warranty, the quality of the work, labor and/or materials supplied, and/or the acts or omissions of the participating contractor. The applicant hereby waives and releases any and all liabilities, claims, judgments, suits, or demands for damages to persons or property against the City and County of Denver, its appointed and elected officials, employees, affiliates, and agents arising out of, resulting from, or relating to the rebate program.

Endorsement:
The City and County of Denver, its appointed and elected officials, employees, affiliates, and agents do not endorse any particular manufacturer, contractor, vendor, product, retailer, system design, or claim in promoting this program.

Warranties:
The City and County of Denver, its appointed and elected officials, employees, affiliates, and agents do not warrant the performance of covered products expressly or implicitly.

Customer Information:
To the extent permitted by applicable law, including the Colorado Open Records Act, C.R.S. §§ 24-72-200.1-205.5, the City and County of Denver shall keep all applicant-specific information confidential, including (a) customer contact information, and (b) information collected about existing energy-related technologies at the applicant's site. The City and County of Denver will not use the name or identifying characteristics of the applicant in advertising or publicity without applicant's advance written approval. The applicant understands that it may be contacted by the City and County of Denver to complete an optional survey or questionnaire to provide demographic information and feedback on satisfaction with the program.

I/we understand that the information submitted will be verified prior to approval. *

Electronic Signature *

23. Once you are ready to submit, click 'Submit' to submit your application for Pre-Approval. If you choose to not submit the application and the application stays in a 'Draft' state for 30 days, the portal will automatically 'Decline' the application. If this happens but you wish to submit the application still, you will have to create a new application.

The screenshot shows the Denver Climate Action Sustainability & Resiliency portal. The page title is 'Pre-Approval Details'. Under the 'Overview' section, the 'Pre-Approval Name' is 'Roberta Nottingham - Renewables - Contractor', the 'Program' is 'Renewables', the 'Pre-Approval Status' is 'Draft', and the 'Pre-Approval Type' is 'Contractor'. A 'Pre-Approval Instructions' dropdown is visible. Below this, a 'Pre-Approval Steps' sidebar lists: Contractor Information, Add Project Site, Program Requirements, Rebate Leads, Acknowledgement, and Submit Pre-Approval. The main content area shows a 'Submit Pre-Approval' button (Step 6 of 6) with a warning: 'Please review your application information before submission. Once the application is submitted, it cannot be updated.' There are 'Back' and 'Submit' buttons at the bottom.

24. You'll receive a confirmation that the submission is successful and should note any messaging regarding this program. Please give us 10 business days to process any application or payment request.

The screenshot shows the Denver Climate Action Sustainability & Resiliency portal. The page title is 'Pre-Approval Details'. Under the 'Overview' section, the 'Pre-Approval Name' is 'Marc Roz - Home Energy - Contractor', the 'Program' is 'Home Energy', the 'Application ID' is 'AID-004163', the 'Pre-Approval Status' is 'Submitted', and the 'Pre-Approval Type' is 'Contractor'. A 'Pre-Approval Instructions' dropdown is visible. Below this, a 'Pre-Approval Steps' sidebar lists: Contractor Information, Add Project Site, Program Requirements, Rebate Leads, Acknowledgement, and Submit Pre-Approval. The main content area shows a 'Submit Pre-Approval' button (Step 6 of 6) with a green confirmation message: 'Thank you! your application was successfully submitted.' Below this, it says 'You can review your Application status anytime online.' and a warning: 'The program's popularity has been overwhelming, Rebates are reserved on a first-come first-serve rebate program. The Program administration team will be in touch to confirm the status of your rebate pre-approval.' There is a 'Back' button at the bottom.

25. You will receive an email notification that your application has been submitted.

Dear Marc Roz,

Thank you for submitting a rebate application lead to the City and County of Denver's Climate Action Rebate Program for the project sites listed below. Please note that this application is a lead only and no rebate funds have been reserved. Please give our team 10 business days to process this application. Once the project has been approved, you have 90 days (120 days if a solar project) to complete your project and request for payment. If no action is taken by 4/25/2024 10:26:36 PM this lead will expire. You may request an extension if your project requires more time but, extensions are at the sole discretion of the City and County of Denver.

Next Steps for this Rebate Lead:

1. Once the project has been approved you and the homeowner will receive an approval email from us, and you can move forward with the project and complete the project.
2. Once the project is complete and you have gathered the required documentation, please navigate to the "My Rebate Leads" page and find the rebate lead ID you want to request for payment.
3. On the right-hand side, click on the "down" arrow to bring up the drop-down menu for the rebate lead and click on "Request for Payment" to move forward with the process or click on "Request Contract Extension" if you haven't been able to complete the project yet and you need more time.
4. After you have clicked on "Request for Payment" a new page will pop up that will request more detailed information about the project you completed. Only upload the proper documents for the proper equipment. The last step is only for specific contractors that are participating in an Xcel Energy EV charger program so you can skip the last step if that does not pertain to you. Now click on "Submit". **Please allow us up to 10 business days to review your payment request.**
5. Now you can navigate to the "My Payment Requests" and see the status of the payment request you just submitted will say "Unscheduled" which means it is under review. When it says "Completed" that means it has been approved and will now show up on your "My Payments" page for you to see the status of the payment. If it shows as "Canceled" that means it was returned for you to make edits and resubmit.
6. You can now navigate to your "My Payment Requests" and "My Payments" page on the portal to check further progress and progression of your rebate payment.

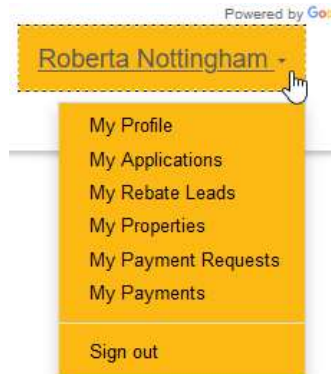
The funding for this program comes from the Climate Protection Fund, a special revenue fund approved by the Denver voters in 2020. Denver's Climate Protection Fund is dedicated to eliminating greenhouse gas emissions and air pollution, supporting climate adaptation, and creating new jobs to improve the lives of Denverites, with efforts focused on under-resourced communities and communities most vulnerable to climate change impacts. Visit denvergov.org/climate to learn more.

Please do not hesitate to contact us at denverrebate@aptim.com for questions regarding this application or other projects you may be considering.

26. Aptim program staff will review your application and either approve it or email you with any corrections that need to be made or if the project cannot be approved. Once the project has been approved you will have 90 days to complete the project or 120 days for solar projects.

Tracking Applications

1. To check on the status of this application, or any other applications, click the dropdown next to your profile and select My Applications.



2. A list view will display where you can see the Application State at any time.

My Applications

Name ↑	Program	Application Type	Application Creator	Application State	Owner	Created On
Roberta Nottingham - Renewables - Contractor	Renewables	Contractor	Roberta Nottingham	Submitted	# Portals- denverenergyrebate- qa	1/23/2023 1:53 PM

3. Status Definitions:

Draft- Application for pre-approval has been created and can still be edited by the contractor. Application is **NOT** submitted for review. Contractor can **Withdraw** these applications.

Submitted- Application for pre-approval has been submitted and is waiting to be reviewed for approval.

Approved- Application for pre-approval has been approved and rebate funds have been reserved for this project. Contractor can now move forward with the project and request payment when the project is completed.

Declined- Application for pre-approval was in Draft status for over 30 days, it is assumed the project has been canceled/homeowner has backed out of the project. Contractor can create a new application if they wish to do so.

Rejected- The application has been reviewed by and the application has been rejected instead of approved. Rebate funds will **NOT** be reserved for this project, contractor will not be allowed to request payment for rebate funds.

Closed- All rebate leads associated with the application have been approved and paid out. This application is officially closed and no further action from the contractor is needed.

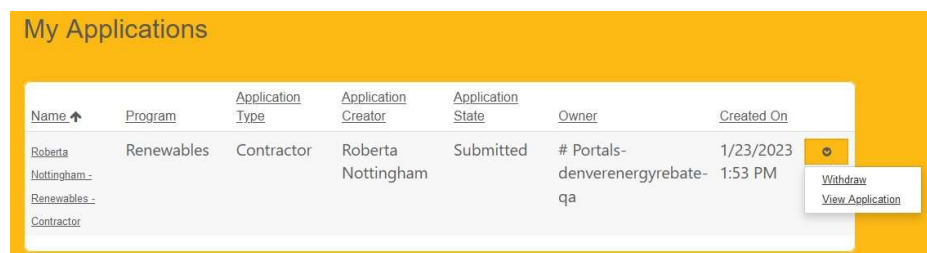
Unscheduled- The contractor has submitted the Payment Request for review and it is waiting to be reviewed.

Completed- Payment Request has been reviewed and approved. A payment will go out with the next weekly payment schedule.

Canceled- Payment request has been sent back to the contractor to make necessary edits and must resubmit the payment request.

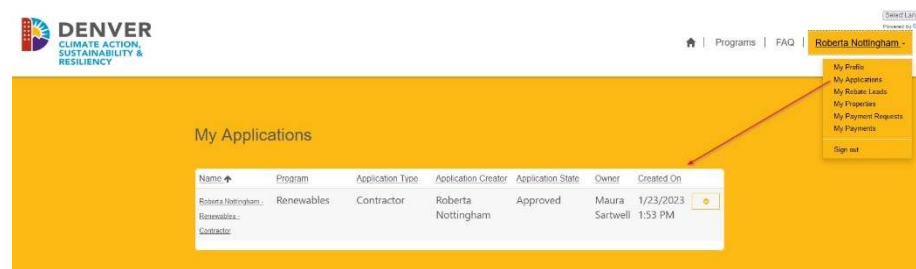
Withdraw an Application

1. To withdraw your application, click the dropdown caret and select 'Withdraw'.



Contract Extensions

1. Once an application is approved, the Application State updates in the Portal view.



- The Rebate Lead(s) associated with this application also become approved.
- Click on the dropdown caret next to your profile name and select My Rebate Leads.



- The list of active Rebate Leads will display in this view. Notice in the upper left corner you can change views from "My Rebate Leads-Without Payments" to "My Rebate Leads-Pending/Completed Payments". On one page is all of your rebate leads that you have not requested payment on, and the other page are all rebates leads that you have already submitted a payment request for. Once you have request payment for a rebate lead, that lead will move to the page of rebate leads with payment request. If that payment request is canceled, then the rebate lead will move back to the page of rebate leads without payment requests.

My Rebate Leads

My Rebate Leads - Without Payments -

Contract Product	Application ID	Property	Product	Max Rebate Amount	Application Status	Payment Status
CP-004601	AID-004320	201 W Colfax Ave Dept 301 Denver CO 80202	Air Source Heat Pump (High Efficiency)	\$0.00	Approved	
CP-004702	AID-004163	201 W Colfax Ave Dept 601 Denver CO 80202	Air Source Heat Pump (High Efficiency)	\$1,200.00	Submitted	

- Click the dropdown caret to the right of the contract to request a Contract Extension.

My Rebate Leads

Name	Contract	Property	Product	Max Rebate Amount	Application State
CP-001263	CON-001258	5800 E 58th Ave Ste C Commerce City CO 80022	Battery Storage	\$2,750.00	Approved
CP-001264	CON-001258	5800 E 58th Ave Ste C Commerce City CO 80022	Battery Storage (Alone)	\$500.00	Approved

Request Contract Extension
Request for Payment
View details
Edit

- A new form will display prompting you to complete the Reason for Extension, Justification, and the New Contract End Date.

Create Contract Extension

Reason for Extension *
Homeowner Unavailable

Justification *
Homeowner will be out of town for a wedding and does not have anyone local to grant us entry to the home.

New Contract End Date (MM/DD/YYYY) *
3/3/2023

Contract End Date
02/23/2023

Submit

7. Click 'Submit' which redirects you to the My Rebate Leads list.
8. Notice that you are not permitted to request another Contract Extension if there is already one open against the contract.

My Rebate Leads

My Rebate Leads - Without Payments

Contract Product	Application ID	Property	Product	Max Rebate Amount	Application Status	Payment Status
CP-002002	AID-002290	201 W Colfax Ave Dept 703 Denver CO 80202	Heat Pump Water Heater (Smart)	\$1,750.00	Declined	
CP-002008	AID-002010	201 W Colfax Ave Denver CO 80202	Solar (per kW)	\$4,000.00	Approved	
CP-002005	AID-002864	201 W Colfax Ave Dept 504 Denver CO 80202	Mini-Split Heat Pump (Cold Climate)	\$3,500.00	Declined	

9. You will receive an email with the results of your contract extension request.

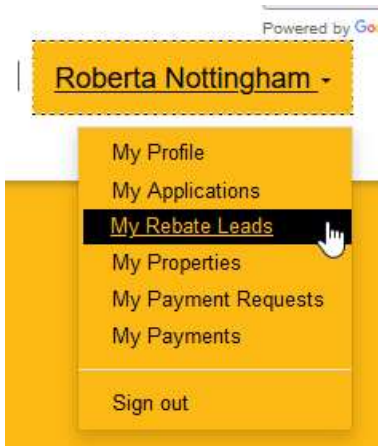


Requesting Payments

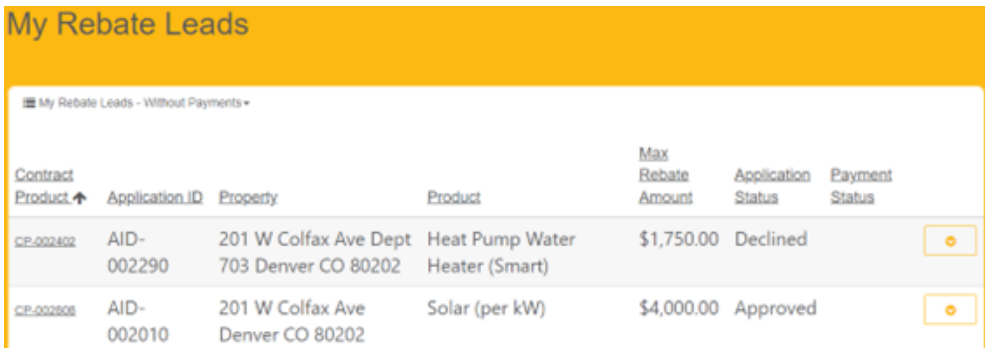
1. Once an application is Approved, the Application State updates in the Portal view.



2. The Rebate Lead associated with this application also becomes approved.
3. Click on the dropdown caret next to your profile name and select My Rebate Leads.



4. The default view of Rebate Leads-Without Payments will display in this view.



- Click the dropdown caret to the right of the contract to Request for Payment.

The screenshot shows a table titled "My Rebate Leads" with a sub-header "My Rebate Leads - Without Payments". The table has columns for Contract Product, Application ID, Property, Product, Max Rebate Amount, Application Status, and Payment Status. A dropdown menu is open for the first row, showing options: "Request for Payment", "View details", and "Edit".

Contract Product	Application ID	Property	Product	Max Rebate Amount	Application Status	Payment Status
CP-002802	AID-002290	201 W Colfax Ave Dept 703 Denver CO 80202	Heat Pump Water Heater (Smart)	\$1,750.00	Declined	
CP-002808	AID-002010	201 W Colfax Ave Denver CO 80202	Solar (per kW)	\$4,000.00	Approved	
CP-003035	AID-002864	201 W Colfax Ave Dept 504 Denver CO 80202	Mini-Split Heat Pump (Cold Climate)	\$3,500.00	Declined	

- A new Payment Request form will display to collect information about the project.

The screenshot shows a "Request for Payment Steps" sidebar with "Product Measures" selected. The main form is titled "Product Measures" and is "Step 1 of 3". It contains several fields with red asterisks indicating they are required:

- Building Type * (Dropdown menu: Single-Family)
- Total Labor Cost (Before Rebate) * (Text input: \$ 0.00)
- Total Material Cost (Before Rebate) * (Text input: \$ 0.00)
- Old Equipment * (Dropdown menu: None)
- Installed kW * (Text input: 0.00)
- Panel Manufacturer * (Text input)
- Panel Model Number * (Text input)
- Inverter Model Number 1 * (Text input)
- Inverter Serial Number 1 (Text input)


Product Measures










Each product type has a series of questions that must be filled out before submitting the application for final review and payment. Required fields are flagged with a red asterisk. Click the 'Save & Next' Button to move to the next page.

Note: The **SUM** of the two values you enter for 'Total Labor' and 'Total Material' cost should equal the total project cost for that specific equipment **BEFORE** rebates have been applied and after discounts have been deducted; this should match the final invoice. Also, the required information for each Product type can be found in Appendix A of this document: Application Requirements by Product Check List.

Request for Payment Steps	Product Measures Step 1 of 3
Product Measures	
Upload Document(s)	
Other Rebate(s)	
Building Type *	Single-Family
Total Labor Cost (Before Rebate) *	\$ 0.00
Total Material Cost (Before Rebate) *	\$ 0.00
Old Equipment *	None
Installed kW *	0.00
Panel Manufacturer *	
Panel Model Number *	
Inverter Model Number 1 *	
Inverter Serial Number 1	

Document Uploads

- The next page is where you will upload all of the required documents and photos by clicking the  icon. Note the *italicized message* under each listed document folder which tells you what project type that document is required for.

Request for Payment Steps	Upload Document(s) Step 2 of 3
Product Measures	
Upload Document(s)	
Other Rebate(s)	
City and County of Denver Permit 	<p><i>Required for all projects.</i></p> <p> CP-002808_DENPERMIT_1336.docx Uploaded on 10/26/2023, 1:03:07 PM </p>
Design Document(s) 	<p><i>Optional for Solar and not pertinent for other projects.</i></p>
Electrical Upgrade Photo 	<p><i>Required for Electrical Service Upgrades. Photo(s) of Panel, Wiring, Utility Connection, etc. upgrade(s).</i></p>
Contract with Homeowner 	<p><i>Required for all projects. Contract executed between the contractor and homeowner.</i></p>
Installed Equipment Photo 	<p><i>Photos of Installed Equipment</i></p>
Installed Solar Panels Photo 	<p><i>Photo of Installed Solar Panels - Required for solar rebate applications.</i></p>
Photo(s) Of Other Qualifying Equipment 	<p><i>Required for Solar, Battery Storage, and Electrical Service Upgrade Projects. Ex. Heat pumps and their equipment tags, Bi-Directional EV chargers for Solar and Battery Projects. Photos of other rebate qualifying equipment that was installed for the Electric Service Upgrade Projects.</i></p>

2. Always make sure to upload documents and photos as either a PDF or a JPEG/JPG and make sure they are orientated upright. We cannot open Zip Files or HEIC file types. You can certainly put more than one document in each folder. The documents required to be uploaded for each Product type can be found in Appendix A: Application Requirements by Product Check List.
3. When uploading photos for an Air Source Heat Pump or a Mini-Split Heat Pump, we ONLY want photos of the OUTDOOR unit. We do not want photos of any of the indoor components.
4. For Electric Service Upgrade payment requests, always add photos of the other rebate qualifying equipment that required the electric service upgrade in folder labeled 'Photo(s) of Other Qualifying Equipment'.
5. Once you have uploaded all the required documents click the 'Save & Next' button at the bottom of the page. If you need to go back a step to make changes then hit the 'Back' button.

The screenshot shows a vertical list of document requirements, each with a green checkmark icon and a document icon. The items are: 'Other Docs', 'Spec Sheet' (with a note: 'Required for Heat Pumps, Mini-Splits, Water Heaters, EV Chargers, Solar, and Batteries. Must show performance specs to ensure unit meets program requirements.'), 'Signed Utility Consent Form' (with a note: 'Required for Heat Pumps, Mini-Splits, Water Heaters, EV Chargers, Solar and Batteries.'), and 'Xcel Energy Utility Bill' (with a note: 'Required for all projects and must be for the project address and from within the last year.'). At the bottom, there are two buttons: 'Back' on the left and 'Save & Next' on the right, both highlighted with red boxes.

Other Rebate(s)

1. The last step is only meant for specific contractors who are currently participating in Xcel Energy's Accelerate At Home Program. This is where those contractors will add in any other Xcel Rebates here by clicking the 'Create' button
2. If you are not part of that program, please leave this page blank and hit the 'Submit' button when you are done.

Note: Once the payment request has been submitted, it is read only, and no changes will be allowed in the portal unless you receive an email stating that changes are required from you and to resubmit the payment request when you are done making changes. You can also always contact us to request that we send back the payment request if need be.

Request for Payment Steps

- Product Measures
- Upload Document(s)
- Other Rebate(s)**

Other Rebate(s) Step 3 of 3

Contractors who are registered with Xcel's EV Accelerate at Home Program only; please enter in Xcel rebate amount. All other contractors can directly submit without completing this step.

[Create](#)

Name ↑	Amount	Created On
There are no records to display.		

[Back](#) [Submit](#)

Tracking Payment Requests

- Contractors may now use their account menu to view updates on the payment requests they have submitted.
- Click the Account menu.
- Click on the My Payments Requests links to view updates.

DENVER
CLIMATE ACTION,
SUSTAINABILITY &
RESILIENCY

Request for Payment

Overview:

Contract: CON-001864
Homeowner Full Name: John Elway
Estimated Product Amount: 10,000.00

Property: 201 W Colfax Ave Denver CO 80202
Product: Heat Pump Water Heater (High Efficiency)
Estimated Rebate Amount: 1,000.00

Instructions

Other Rebate(s)

Name ↑	Amount	Created On
Create		

- Contractors will now see the My Payment Requests page. It creates a work order in the CRM. The Status column shows it has not been processed (Unscheduled). It shows the date submitted, the rebate amount and the Contract Product number for the contract submitted in the portal.

My Payment Requests					
Contract Product	Product	Address	Max Rebate Amount	Requested Date	Status ↓
CP-002808	Solar (per kW)	201 W Colfax Ave Denver CO 80202	\$0.00	1/19/2024 2:26 PM	Unscheduled

5. Contractors will have to check periodically for status updates. Status definitions are as follows:

Unscheduled- The contractor has submitted the Payment Request for review and it is waiting to be reviewed.

Completed- Payment Request has been reviewed and approved. A payment will go out with the next weekly payment schedule.

Canceled- Payment request has been sent back to the contractor to make necessary edits and must resubmit the payment request. Contractor will receive an email in this case.

Tracking Approved Payments

1. Once a payment request has been approved, it will appear on your My Payments page on the portal. You will be able to see the project information associated with the payment request. This same information will be sent in an email to the contractor which will tell you which payments are being sent out to you that week.

Contract Product ID. ↑	Payment ID	Product	Program	Address	Amount Approved	Payment Status
CP-002808	PA-003094	Solar (per kW)	Renewables	201 W Colfax Ave Denver CO 80202	\$0.00	New

How Edit a Payment Request Once it Has Been Sent Back

1. Once you have received the email below saying that your payment request has been sent back requesting changes you must make note of the changes/issues listed in the email under 'Reason for Return' and go back to your payment request and make those changes and resubmit the payment request.

Thank you for submitting a final application to the City and County Denver's Climate Action Rebate Program. We have received your application and request for payment on CP-004064 for the project at **201 W Colfax Ave Dept 104 Denver CO 80202** however after reviewing it, additional information is needed.

Reason for return: 1. Missing Final Invoice. 2. Missing photo of heat pump name plate.

Please go back into the payment request and make the requested changes and resubmit the payment request once finished. Please reply to this email if you have any further questions about the issues listed above.

Kindest regards,



Denver Climate Action Rebate Team
Climate Action, Sustainability & Resiliency
City and County of Denver
DenverRebates@acdm.com | ClimateActionRebates@denvergov.org

311 | socketgov.com | denvergov.org | Denver 8.TV | Facebook | Twitter | Instagram

2. Go Back to the portal and go to your 'My Rebate Leads' page.
3. Stay on the defaulted page that is 'My Rebate Leads-Without Payments' and look for the rebate ID that was referenced in the email.
4. Open the drop down menu to the right of the rebate lead and click on 'Request for Payment' just like you did when you were requesting a payment request for the first time.

Contract	Product	Application ID	Property	Product	Max Rebate Amount	Application Status	Payment Status
CP-002402		AID-002290	201 W Colfax Ave Dept 703 Denver CO 80202	Heat Pump Water Heater (Smart)	\$1,750.00	Declined	
CP-002808		AID-002010	201 W Colfax Ave Denver CO 80202	Solar (per kW)	\$4,000.00	Approved	
CP-003030		AID-002864	201 W Colfax Ave Dept 504 Denver CO 80202	Mini-Split Heat Pump (Cold Climate)	\$3,500.00	Declined	

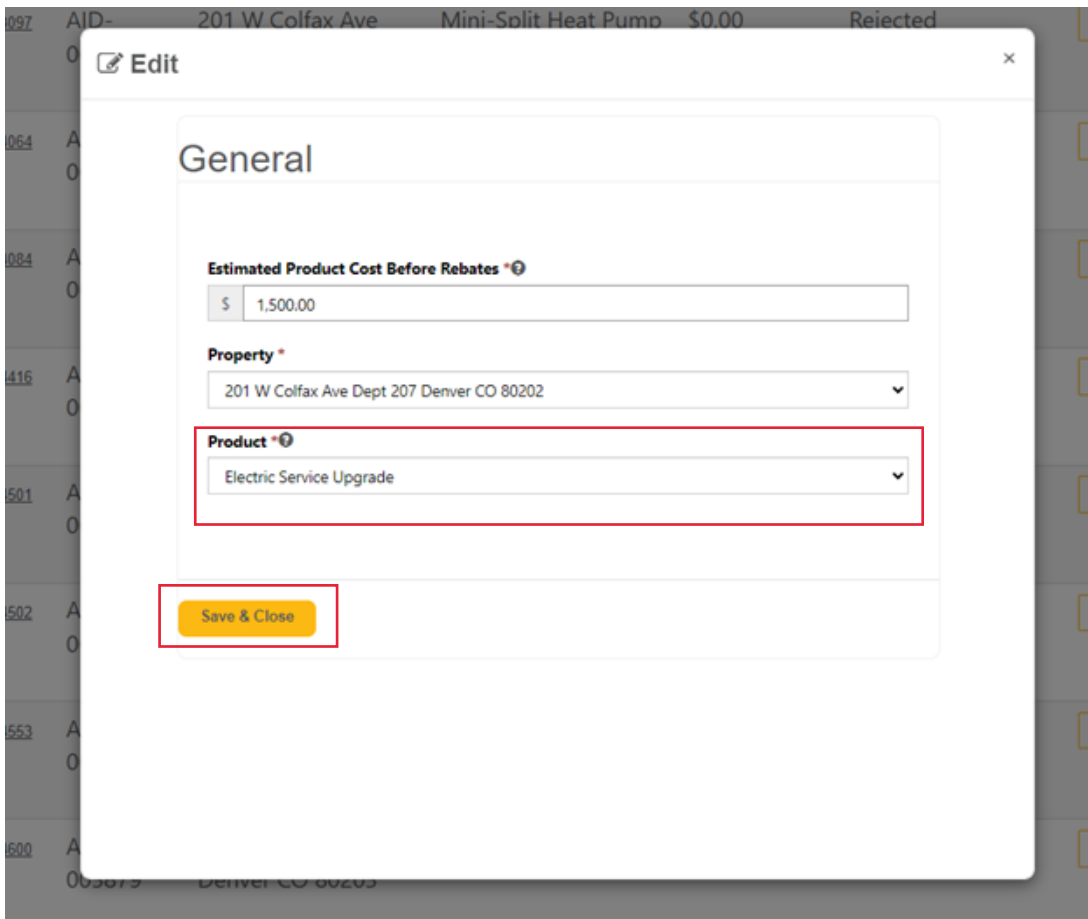
5. Now when the payment request form opens, it will open the previous payment request you submitted and you can make any necessary changes, add or remove documents, and resubmit for another review.

How to Change the Equipment on a Payment Request

1. Go to your My Rebate Leads page
2. Find the rebate lead you need to change the equipment on and open the drop down menu to the right and click on 'Edit'.

CP-004416		AID-003878	201 W Colfax Ave Dept 207 Denver CO 80202	Electric Service Upgrade	\$1,200.00	Approved	
CP-004501		AID-004240	201 W Colfax Ave Dept 107 Denver CO 80202	Heat Pump Water Heater (Smart)	\$7,000.00	Draft	

3. A popup window will open. Click on the 'Product' box to open a drop down menu and select the new equipment you need to change it to.



4. Click the 'Save & Close' when you are finished. Also you might need to refresh your screen so the new equipment is properly reflecting on your My Rebate Leads Page. Now you can submit a payment request.

How to Edit an Application Once it Has Been Sent Back

1. You have received an email stating an application was sent back and you must make changes to the application and resubmit the application for review. This mean the application was reviewed but put the application back into a 'Draft' status so you can go back into the application and make the requested changes. You still start this by going to your 'My Applications' on the portal.
2. You will see a list of all your applications that you have created and the 'Application State' they are in. Find the application AID number, that is referenced in the email, open the drop down menu to the right of that application and select 'View Application'. You can also click on the application ID number that is underlined on the left sign and both options will take you back into the application.

Application Id	Name	Program	Application Type	Application Creator	Application State	Owner	Created On	
<u>AID-004163</u>	Marc Roz - Home Energy - Contractor	Home Energy	Contractor	Marc Roz	Draft	# Portals-denverhomeenergy	1/18/2024 1:40 PM	<div style="border: 1px solid black; padding: 2px;"> View Application </div>

3. Now you are back in the application where you can click on the 'Save & Next" button at the bottom of the page to navigate through each step or, you can click on the step boxes on the left that will bring you directly to the step you need to go to.

Pre-Approval Instructions

Pre-Approval Steps

- Contractor Information
- Add Project Site
- Program Requirements
- Rebate Leads
- Acknowledgement
- Submit Pre-Approval

Contractor Information Step 1 of 6

First name *

Last name *

E-mail *

I would like to receive news and offers from this facility via text

Allow Do Not Allow

Business Phone

Mobile Phone

Extension

Verified

Save

Save & Next

4. Changing the Address on an Application

- a. To change the address of an application click on the 'Add Project Site" Pre-Approval step listed on the left.
- b. Open the drop down menu to the right of the listed property and select 'Edit'".

Pre-Approval Instructions

Pre-Approval Steps

- Contractor Information
- Add Project Site
- Program Requirements
- Rebate Leads
- Acknowledgement
- Submit Pre-Approval

Add Project Site Step 2 of 6

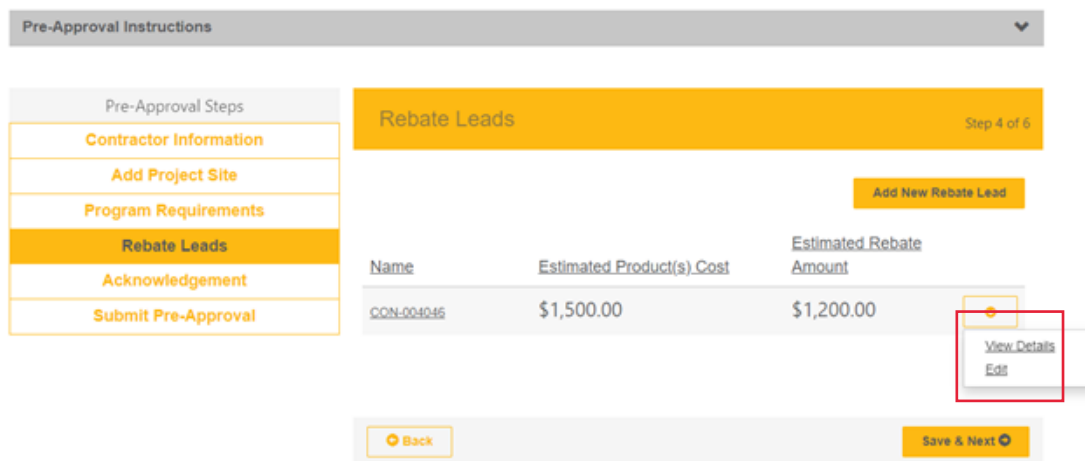
Properties

Name ↑	Application	Property	
PRA-003899	Marc Roz - Home Energy - Contractor	201 W Colfax Ave Dept 601 Denver CO 80202	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> ⌵ Edit </div>

Back

Save & Next

- c. Now remove the entry in the 'Address Line 1' box which will remove the entries for all of the other boxes. Start typing the new street address just as you did the first time and select the correct address from the pop up list.
- d. Scroll down to the bottom, make sure the homeowner's name and contact information is still correct and hit the 'Save & Close' button.
NOTE: You are not done yet, you still need to make sure the new address is also listed for the rebate lead you created.
- e. Click on the 'Rebate Leads' pre-approval step to the left, now open the drop down menu to the right of the listed rebate lead and select 'Edit' or 'View Details'.



- f. Now you are in the step where you first created the product, project cost, and uploaded documents for the application. Notice that your address change has NOT carried over to the rebate lead.
 - g. Open the drop down menu next to the listed Measure and select 'Edit'.
 - h. A pop-up window will appear which will now reflect the new address you want, simply click on the 'Save & Close' button until you are back in the main application menu.
5. Changing the Equipment, Project Cost, Install Dates, or Documents on an Application.
- a. Go to the 'Rebate Leads' Step, open the drop down menu to the right of the listed rebate lead and select 'Edit' or 'View Details'.

- b. Now you are back on the page where you can change the equipment type, estimated install dates, product cost, and add or remove documents. Don't forget to hit the 'Save & Close' button at the bottom when you are finished.

Edit Rebate Lead

Estimated Installation Start Date *

Estimated Installation End Date *

Measures

Add Product

Name ↑	Contract	Property	Product	Max Rebate	Status	
CP-004553	CON-004045	201 W Colfax Ave Dept 901 Denver CO 80202	Heat Pump Water Heater (Smart)	\$1,750.00	Draft	<div style="background-color: #ffc107; padding: 2px 5px; border: 1px solid #ffc107; margin-bottom: 2px;">+</div> <div style="padding: 2px 5px; border: 1px solid #ccc;"> ✎ Edit 🗑 Delete </div>

Estimated Rebate Amount	Estimated Product(s) Cost
\$0.00	\$0.00

✔ **Contract with Homeowner** 🗑

Required for all projects. Contract executed between the contractor and homeowner.

📄 CON-004045_CNTRHO_85840.docx
Uploaded on 2/5/2024, 8:58:41 AM
🗑

✔ **Recent Utility Bill** 🗑

Required for all projects and must be dated within the last year.

📄 CON-004045_RecentUtilityBill_8594.docx
Uploaded on 2/5/2024, 8:59:05 AM
🗑

- c. After you hit the 'Save & Close' Button you are now back on the main page of the application. Now resubmit the application for review.

Contact Info

For further assistance or questions on the portal please contact us using the following:

1. DenverRebate@aptim.com
2. 833-612-0622 Option 1

Appendix A: Application Requirements by Product Check List

Home Energy: Air Source and Ground Source Heat Pumps ONLY 1 ASHP/GSHP REBATE PER PROPERTY

Air Source and Ground Source Heat Pumps			Requirements						
Measure	Max Rebate Amount	Percentage of Cost	SEER	EER	HSPF	SEER2	EER2	HSPF2	Other
Air Source Heat Pump (High Efficiency)	\$ 1,500.00	40%	15.0	11.5	9.0	15.2	11.7	7.8	
Air Source Heat Pump (Cold Climate)	\$ 3,500.00	40%	16.0	10.5	9.5	15.2	10.0	8.1	NEEP Listed, COP at 5F > 1.75, Min 70% ratio for Capacity at 5F / Capacity at 47F
Ground Source Heat Pump	\$ 3,500.00	80%		16.0					

Documents to be Uploaded	Stage Required
Recent Utility Bill (Must be dated from within the last year)	Pre-Approval
Signed Contract/Proposal/Estimate	Pre-Approval
City and County of Denver Permit	Submit for Payment
Signed Utility Consent Form	Submit for Payment
Invoice (Itemized with line deducting the Denver CARE Rebate)	Submit for Payment
Photo of Installed Product (Just the Outdoor Unit)	Submit for Payment
Photo of Name Plate/Equipment Tag (Just the Outdoor Unit)	Submit for Payment
Specification Sheet (Manufacture Spec sheet, AHRI Certification, NEEP Certification)	Submit for Payment
Other Documents	Optional

Required Fields	
Project Type	
Total Labor Cost	
Total Material Cost	
Total Cost (Calculated = Labor + Material)	
Old Equipment - None, Remain & Add, or Remove & Replace	
Does Home have existing cooling	
Yes	Evaporative Cooler (Swamp Cooler)
	Window A/C Unit or Portable Unit
	Air Source Heat Pump
	SC Condenser Unit
Other	
Manufacturer	
Condenser Model Number	
Condenser Serial Number	
Evaporative Coil Model Number	
Evaporative Coil Serial Number	
Furnace Model Number Put "NA" or "Existing" if you did not install a Furnace	
Furnace Serial Number Put "NA" or "Existing" if you did not install a Furnace	
AHRI Reference Number	
Startup Refrigerant Testing Date	
Switchover Temp - Always consult with manufacturer's specifications and recommendations when setting switchover points.	
Variable Speed/Capacity - Yes or No	
Year of Manufacturer	
Unit efficiency	
1	SEER
	EER
	HSPF
2	SEER2
	EER2
	HSPF2
Supplemental Heating Source	
Natural Gas Furnace	
Electric Resistance (Heat Strip in AHU)	
Other	
None	

Home Energy: Mini-Split Heat Pumps ONLY 1 MSHP REBATE PER PROPERTY

Mini-Split Heat Pumps			Requirements						
Measure	Max Rebate Amount	Percentage of Cost	SEER	EER	HSPF	SEER2	EER2	HSPF2	Other
Mini-Split Heat Pump (High Efficiency)	\$ 1,500.00	40%	15.0	11.5	9.0	15.2	11.5	7.8	
Mini-Split Heat Pump (Cold Climate)	\$ 3,500.00	40%	16.0	9.0	10.6	16.0	9.0	9.5	NEEP Listed, COP at 5F > 1.75, Min 70% ratio for Capacity at 5F / Capacity at 47F

Documents to be Uploaded	Stage Reequred
Recent Utility Bill (Must be dated from within the last year)	Pre-Approval
Signed Contract/Proposal/Estimate	Pre-Approval
City and County of Denver Permit	Submit for Payment
Signed Utility Consent Form	Submit for Payment
Invoice (Itemized with line deducting the Denver CARE Rebate)	Submit for Payment
Photo of Installed Product (Just the Outdoor unit)	Submit for Payment
Photo of Name Plate/Equipment Tag (Just the Outdoor unit)	Submit for Payment
Specification Sheet (Manufacture Spec sheet, AHRI Certification, NEEP Certification)	Submit for Payment
Other Documents	Optional

Required Fields	
Building Type	
Project Type	
Total Labor Cost	
Total Material Cost	
Total Cost (Calculated = Labor + Material)	
Old Equipment - None, Remain & Add, or Remove & Replace	
Does home have existing cooling?	
Yes	Evaporative Cooler (Swamp Cooler)
	Window A/C Unit or Portable Unit
	SC Condenser Unit
	Air Source Heat Pump
	Other
Manufacturer	
Outdoor Model Number	
Outdoor Unit Serial Number	
Number of Indoor Units	
AHRI Reference Number	
Startup Refrigerant Testing Date	
Switchover Temp - Always consult with manufacturer's specifications and recommendations when setting switchover points.	
Variable Speed/Capacity - Yes or No	
Year of Manufacturer	
Unit efficiency	
1	SEER
	EER
	HSPF
2	SEER2
	EER2
	HSPF2
Supplemental Heating Source	
Natural Gas Furnace	
Electric Resistance (Heat Strip in AHU)	
Other	
SC Condenser Unit	

Home Energy: Heat Pump Water Heaters ONLY 1 HWPB REBATE PER PROPERTY

Heat Pump Water Heaters		
Measure	Max Rebate Amount	Percentage of Cost
Heat Pump Water Heater (High Efficiency)	\$ 1,000.00	60%
Heat Pump Water Heater (Smart)	\$ 1,750.00	60%

Documents to be Uploaded	Stage Required
Recent Utility Bill (Must be dated from within the last year)	Pre-Approval
Signed Contract/Estimate/Proposal	Pre-Approval
City and County of Denver Permit	Submit for Payment
Signed Utility Consent Form	Submit for Payment
Invoice (Itemized with line deducting the Denver CARE Rebate)	Submit for Payment
Photo of Installed Product	Submit for Payment
Photo of Name Plate/Equipment Tag	Submit for Payment
Specification Sheet (Manufacture Spec sheet, AHRI Certification)	Submit for Payment
Other Documents	Optional

Required Fields
Building Type
Project Type
Total Labor Cost
Total Material Cost
Total Cost (Calculated = Labor + Material)
Old Equipment - None, Remain & Add, or Remove & Replace
Remove/Replace
Manufacturer
Model Number
Serial Number
Previous Water Heating Source
Natural Gas Water Heater
On Demand Natural Gas Water Heater
Electric Water Heater
On Demand Electric Water Heater
Heat Pump Water Heater
Other
Year of Manufacturer
Unity Capacity in Gallons
Input Voltage
120V
240V

Renewables: Solar ONLY 1 SOLAR REBATE PER PROPERTY

Solar		
Measure	Max Rebate Amount	Percentage of Cost
Solar (\$1.00 per Watt)	\$ 4,000.00	80%

This rebate is only available for properties that already have an ASHP, MSHP, GSHP, or a V2B EV Charger already installed at the home.

Documents to be Uploaded	Stage Reequred
Signed Contract	Pre-Approval
Recent Utility Bill (Must be dated from within the last year)	Pre-Approval
City and County of Denver Permit	Submit for Payment
Invoice (Itemized with line calling out Denver CARE Rebate amount)	Submit for Payment
Photo of Installed Panels	Submit for Payment
Specification Sheet	Submit for Payment
Photos of Qualifying Equipment(1 of the photos must include nameplate)	Submit for Payment
Signed Utility Consent Form	Submit For Payment
Design Document(s)	Optional, Very Helpful

Required Fields
Building Type
Project Type
Total Labor Cost
Total Material Cost
Total Cost (Calculated = Labor + Material)
Old Equipment - None, Remain & Add, or Remove & Replace
Remove/Replace
Installed kW
Panel Manufacturer
Panel Model Number
Inverter Model Number
Inverter Serial Number

ONLY ONE BATTERY REBATE PER PROPERTY

Battery		
Measure	Max Rebate Amount	Percentage of Cost
Battery Storage (only available if you have a heat pump, heat pump water heater, or bidirectional EV charger installed)	\$ 2,750.00	80%
Battery Storage (Alone)	\$ 500.00	80%

This rebate is only available for properties that already have an ASHP, MSHP, GSHP, or a V2B EV Charger already installed at the home.

Documents to be Uploaded	Stage Req
Recent Utility Bill (Must be dated from within the last year)	Pre-Approval
Signed Contract	Pre-Approval
City and County of Denver Permit (does not need to be signed)	Payment Request
Signed Utility Consent Form (Not required for new construction)	Payment Request
Invoice (Itemized with line calling out Denver CARE Rebate amount)	Payment Request
Photos of Installed/Existing Heat Pump (One photo must include nameplate) or V2B EV charger	Payment Request
Photo of Installed Product	Payment Request
Spec Sheet of Battery	Payment Request

Required Fields
Building Type
Project Type
Total Labor Cost
Total Material Cost
Total Cost (Calculated - Labor + Material)
Old Equipment - None, Remain & Add, or Remove & Replace
Battery Only or Installed Qualifying Product
Qualifying Installed Measure
HPSH
HPWH
V2B EV Charger
None
Model Name
Model Number
Serial Number

EV Charging ONLY 1 EV CHARGER REBATE PER PROPERTY

EV Charging		
Measure	Max Rebate Amount	Percentage of Cost
EV Charging - Level 2 Energy Star Charger	\$ 200.00	80%
V2B/Bidirectional EV Charging	\$ 2,000.00	80%

Documents to be Uploaded	Stage Reequred
Recent Utility Bill (Must be dated from within the last year)	Pre-Approval
City and County of Denver Permit	Submit for Payment
Signed Utility Consent Form	Submit for Payment
Invoice (Itemized with line deducting the Denver CARE Rebate)	Submit for Payment
Photo of Installed Product	Submit for Payment
Specification Sheet	Submit for Payment
Other Documents	Optional

Required Fields
Project Type
Total Labor Cost
Total Material Cost
Total Cost (Calculated = Labor + Material)
Old Equipment - None, Remain & Add, or Remove & Replace
Remove/Replace
Model Name
Model Number
Serial Number
Charger Type
Bi-Directional
Level 2
Tesla
Ford
Other

Home Energy: Electrical Service Upgrade ONLY 1 REBATE PER PROPERTY

Electrical Service Upgrade		
Measure	Max Rebate Amount	Percentage of Cost
Electric Service Upgrade - Must also be eligible to participate in and submit an application for another offering through the CARE program (HPSH, HPWH, Mini-Split, EV Charging, Solar, and/or Battery Storage).	\$ 2,000.00	80%

Documents to be Uploaded	Stage Reequred
Recent Utility Bill (Must be dated from within the last year)	Pre-Approval
City and County of Denver Permit	Submit for Payment
Invoice (Itemized with line deducting the Denver CARE Rebate)	Submit for Payment
Photo of Electrical Upgrade (Labeled Panel/Subpanel, Wiring, Utility Connection, etc.)	Submit for Payment
Photo of Qualifying Equipment (Showing Name Plate/Equipment Tag if available)	Submit for Payment
Other Documents	Optional

Required Fields
Building Type
Total Labor Cost
Total Material Cost
Total Cost (Calculated = Labor + Material)
Old Equipment - None, Remain & Add, or Remove & Replace
Panel Capacity in Amps
Panel Location
Description of Work Performed

Appendix B: Contractor Portal Training January 5th, 2023

Portal Demo Video: <https://www.youtube.com/watch?v=5ohysGbcaAg>



City and County of Denver Home Energy Rebate Program

Contractor Portal Training

DENVER HOME ENERGY CONTRACTOR PORTAL TRAINING

January 5, 2023

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- > Contractor Registration
- > Rebate Application Process



INTRODUCTION

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- > Improve usability
- > Project tracking
- > Ability to reserve rebate funds
- > Added Google Translate – Spanish and other languages available

- > Ex. – Electrical License, must be an Xcel Energy Registered Trade Partner (Heat Pump and Heat Pump water heater requires completions of Xcel’s training requirements)



PROCESS OVERVIEW

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The screenshot shows a web registration page. At the top right, there is a language selection dropdown menu with the text "Select Language" and "Powered by Google Translate". Below this, there are navigation links: a home icon, "Programs", and "Sign in". A blue horizontal bar with the word "RESILIENCY" is visible. Below the bar, there are two buttons: "Sign in" and "Sign Up" (the latter is highlighted with a yellow border). To the right of these buttons is the text "Redeem invitation". Below this is a section titled "Register for a new local account" with three input fields labeled "* Email", "* Password", and "* Confirm password". A yellow "Register" button is located at the bottom of this section. Two orange arrows are drawn on the page: one points from the top right towards the "Sign in" link, and another points from the left towards the "Sign Up" button.





- To expedite process, ensure all information is entered/uploaded per forms



LIVE DEMO

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QUESTIONS

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