

## Home Efficiency Rebates Retroactivity Fact Sheet and Eligibility Checklist

Retroactive rebates are only permitted for the [Home Efficiency Rebate \(HOMES\)](#) portion of the Indiana Energy Saver Program. According to the [US Department of Energy \(DOE\) guidance](#), retroactive rebates are not allowed for the [Home Appliance Rebate \(HEAR\)](#) portion of the Indiana Energy Saver Program.

For a project to be considered eligible for a retroactive HOMES rebate, the following requirements must ALL be met.

### **Project Start Date:**

- The retrofit must have begun after August 16, 2022, and been completed prior to May 14, 2025. Energy efficiency projects initiated after the IESP launch date of May 14, 2025, are ineligible for retroactive rebates and must follow the standard application process.

**Home Assessment:** A comprehensive home assessment must have been conducted prior to the retrofit, capturing:

- Dwelling type
- Performance or efficiency of the dwelling unit, components, materials (such as insulation), and systems
- Existing equipment, materials, or systems slated for replacement.

### **Energy Savings Model:**

- The contractor identified and proposed new equipment, systems, or materials for installation.
- An energy savings estimate was produced using DOE-approved modeling software consistent with BPI 2400, calibrated to the dwelling unit's historical energy use.
- The modeled energy savings estimate must meet or exceed 20% of the total energy use of the dwelling unit.

### **Consumer Acknowledgements:**

- Written acknowledgment provided by the contractor and signed by you, the consumer, regarding the estimated impact on household energy costs and consumption, including a dollar estimate of first-year energy savings based on current utility rates.
- Written acknowledgment provided by the contractor and signed by you, the consumer, of the remaining payment amount owed after applying the Home Efficiency rebate.

**Project Invoice:** The contractor provided a detailed project invoice, inclusive of the total cost of all upgrades and any rebated amounts.

**Major Upgrades:** The retrofit included at least one major upgrade and did not include generation technologies.

- Major upgrade - Energy usage, equipment, technologies, and services related to heating and cooling, envelope, and water heating end uses.
- Generation technologies - Onsite solar photovoltaic, combined heat and power, or other renewable energy system.

**Data Collection:** All data required in the Data & Tools Requirements Guide was collected.

- Data & Tools Requirements Guide [https://www.energy.gov/sites/default/files/2024-12/program-requirements-and-application-instructions\\_121624.pdf](https://www.energy.gov/sites/default/files/2024-12/program-requirements-and-application-instructions_121624.pdf)

You must be able to provide documentation showing all requirements listed above have been satisfied to qualify for a retroactive rebate. All eligibility decisions are subject to final review by IESP staff. If you believe you have met all the requirements for a retroactive rebate, you can begin the process by contacting the IESP Call Center at 855-446-7283.

For more information, please visit the IESP website [www.indianaenergysaver.com/](http://www.indianaenergysaver.com/) or contact us at **855-446-7283**.