Residential HVAC & HPWH:

Midstream, Online Intake Tool

Application Process Overview

Questions?
Contact our team at
marylandmidstream@icf.com

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Table of Contents

Questions?
Contact our team at
marylandmidstream@icf.com

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2024 Program Equipment Eligibility

Equipment	System Type	Tier	Efficiency Levels	
			SEER2	**HSPF2**
Air Source Heat Pumps OR Ducted Mini Split Systems	Single Package	1	15.2	6.7
	Split System	1	15.2	7.5
	Single Package	2	16.9	6.7
	Split System	2	16.9	7.5
Central Air Conditioner	Single Package	1	15.2	
	Split System	1	15.2	
	Single Package	2	16.9	
	Split System	2	16.9	
Ductless Heat Pump	Multi-Zone	N/A	15.5	7.5
	Single Zone	N/A	18	7.5
Geothermal Heat Pump	Closed Loop	N/A	17.1 EER, 3.6 COP	
Smart Thermostat		N/A	ENERGY STAR® Certified	
Heat Pump Water Heater		N/A	ENERGY STAR® Certified	

Effective for installs on or after 4/1/2024

Ask Participating Distributor for rebate amounts.

Online Intake Tool & Sign In

- BGE Portal Site: https://bgemidstream.sightline-icf.com
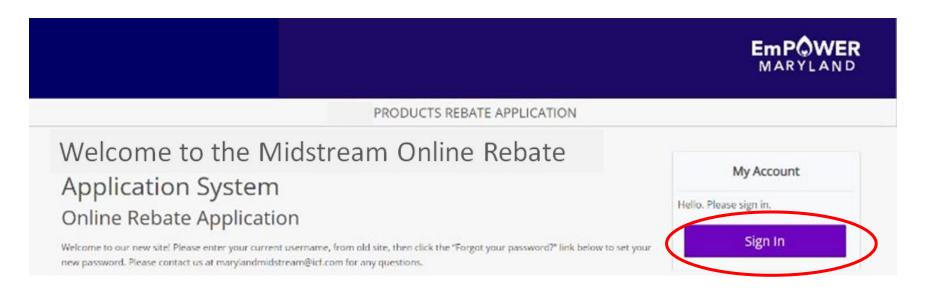
- Pepco Portal Site: https://pepcomidstream.sightline-icf.com

- SMECO Portal Site: https://smecomidstream.sightline-icf.com

- DELMARVA Portal Site: https://delmarvamidstream.sightline-icf.com

- Click **Sign In** to access your account

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Sign In & Password Reset

Midstream: Rebate Application

Welcome to the rebate application system.

Sign In To Your Account

Email Address: tiffany.rolfing@icf.com

Password: ··········

Sign In

Need Help Logging In?
Reset forgotten passwords.

Forgot Password

User Name (email address):

Request Password   **Cancel**

- Enter your Email Address and Password then click **Sign In** to access your application portal. Reach out to marylandmidstream@icf.com with issues.
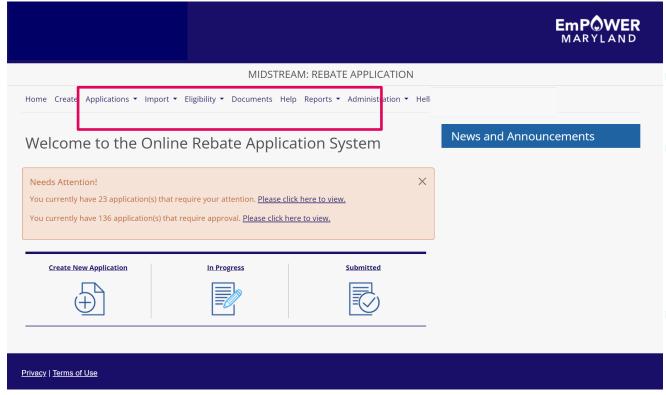
- If you ever forget your password, click the Reset option on the right side of the page and a new password will be sent to your email address

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Online Intake Tool (OIT) Navigation

- **Navigation Menu:** This is where you will navigate around the site

- **Create:** Start a New Application

- **Applications:** Jump to your list of applications based on status – All Applications, Need Attention!, In Progress, or Submitted

- **News and Announcements:** Relevant program announcements will show here (only visible for contractors).

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Navigation Menu

Home   Create   Applications ▼   Import ▼   Eligibility ▼   Documents

- **Create:** Start a New Application.

- **Applications:** Jump to your list of applications based on status – All Applications, Need Attention!, In Progress, or Submitted.

- **Import:** Bulk upload several applications at once.

- **Eligibility:** Enter commercial or residential install address to confirm utility account eligibility.

- **Documents:** Program resources will be located here including the most recently updated Bulk Import Template.

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Creating a New HVAC Application

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Checking Customer Eligibility
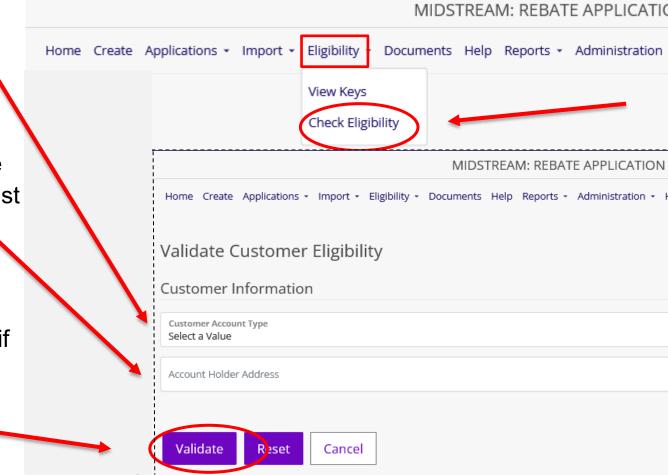
- To make sure you are applying to the correct utility, we **HIGHLY** recommend checking your Customer's Eligibility to verify that they are an active customer.

- Select **Residential** or **Commercial** customer

- **Type** (Do Not Paste) your customer address in slowly, while it searches the database and pick the right address. (Just type in the street name and avoid, Rd. St, Ln. etc…)
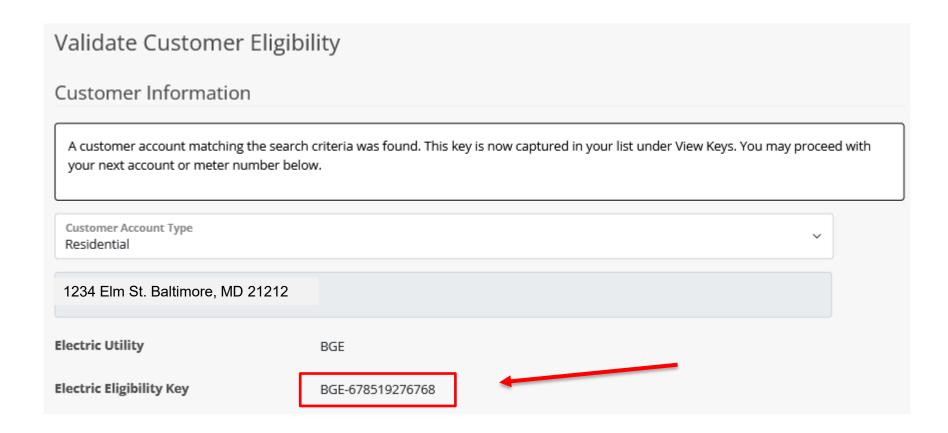
- Please contact Marylandmidstream@icf.com if unable to find address.

- Click **Validate**

MIDSTREAM: REBATE APPLICATIO

Home   Create   Applications ▾   Import ▾   Eligibility ▾   Documents   Help   Reports ▾   Administration

View Keys

Check Eligibility

MIDSTREAM: REBATE APPLICATION

Home   Create   Applications ▾   Import ▾   Eligibility ▾   Documents   Help   Reports ▾   Administration ▾

Validate Customer Eligibility

Customer Information

Customer Account Type
Select a Value

Account Holder Address

Validate   Reset   Cancel

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Copy the Eligibility Key, to Paste into your Application

Validate Customer Eligibility

Customer Information

A customer account matching the search criteria was found. This key is now captured in your list under View Keys. You may proceed with your next account or meter number below.

Customer Account Type
Residential

1234 Elm St. Baltimore, MD 21212

Electric Utility   BGE

Electric Eligibility Key   BGE-678519276768

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Creating a New HVAC Application

- Click on **Create** from menu Or **Create New Application** +

Home | Create | Applications ▼ | Import ▼ | Eligibility ▼ | Documents

Welcome to the Online Rebate Application System

| **Create New Application** | **In Progress** | **Submitted** |

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Name Your Project

- **Project Name needs to be a unique name that you create for this application. We recommend including a portion of the customer's address**

EmP⚡WER
MARYLAND

MIDSTREAM: REBATE APPLICATION

Home   Create   Applications ▾   Import ▾   Eligibility ▾   Documents   Help   Hello contractor@test.com ▾

Create

Project Information

Make sure you use the "Check Eligibility" feature from the "Eligibility" dropdown above. On that page, enter in the customer address to obtain an "Eligibility Key" specific to that customer, then copy that key into the field below.

Project Name needs to be a unique name that you create for this application. We recommend including a portion of the customer's address in the Project Name.

Project Name   Smith 1234 Elm St.

For example, but you can use an invoice number or your own label

Program
- ◯ Commercial Midstream HVAC
- ◯ Residential Midstream Products
- 🔵 Residential Midstream HVAC
- ◯ Commercial Midstream Lighting

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Choosing The Correct Program

- **Important:** If you have multiple program options, make sure you select the correct one. If you don't see the program or utility you need, please contact your distributor.
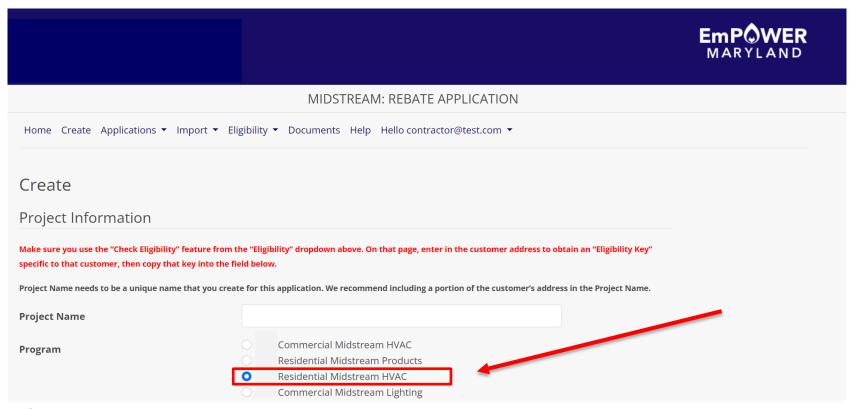
For this example: **Residential Midstream HVAC**
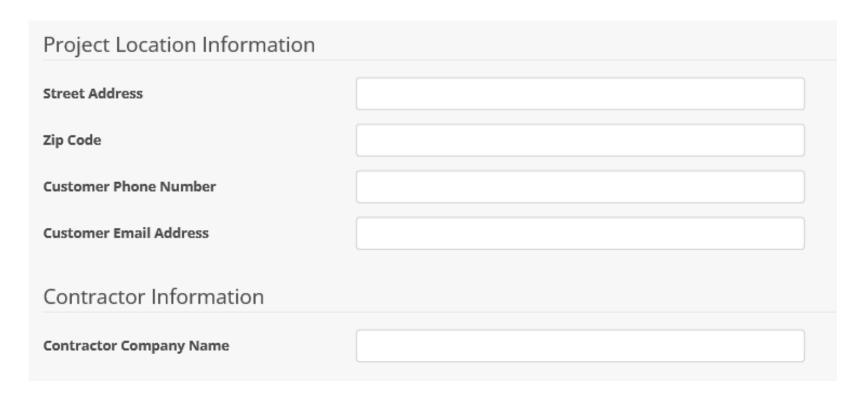
Project Location & Contractor Details
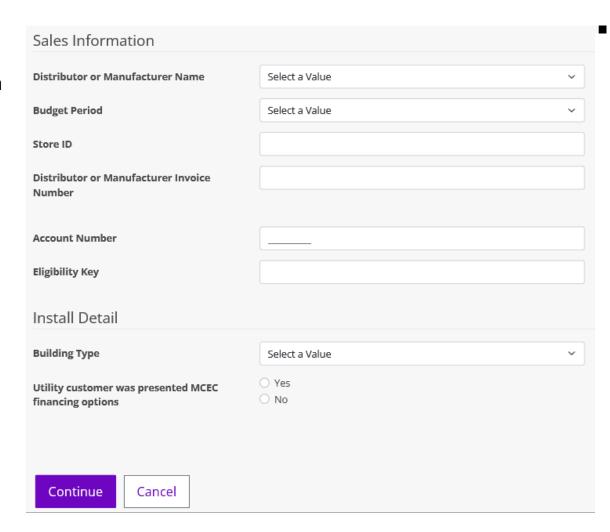
- **Project Location Information**: Installation address & Customer Contact Info

- **Contractor Information**

Project Location Information

Street Address	

| Zip Code | |

| Customer Phone Number | |

| Customer Email Address | |

Contractor Information

Contractor Company Name	

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Sales & Install Details

- Select **Distributor Name** from dropdown

- Select **Budget Period** (Current installation year)(If there is no budget year listed, please contact your distributor)

- Enter **Store ID** of your Distributor or the purchase Store Location

- Enter **Distributor Invoice Number**

- While the customer's **Account Number** is not required, If prompted just type in 10 digits, (i.e.: 1111111111)

- Paste an **Eligibility Key**

- Select **Building Type** from dropdown

- Please refer customers to MCEC (Maryland Clean Energy Center) for potential project financing if needed.

Sales Information

Distributor or Manufacturer Name	Select a Value ▾
Budget Period	Select a Value ▾
Store ID	
Distributor or Manufacturer Invoice Number	
Account Number	_____
Eligibility Key	

Install Detail

Building Type	Select a Value ▾
Utility customer was presented MCEC financing options	○ Yes ○ No

[Continue] [Cancel]

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Creating a New Application: Improvements Summary

- Use left **navigation pane** at any time to jump to application sections
- Click ⊕ to add equipment unit

Use ONLY for **Geothermal Systems.**

Use for all equipment when using the **M2 (SEER2)** ratings.

*AC's and HP's must be the **M2 (SEER2)** rated. If they are not, they will not qualify.

MIDSTREAM: REBATE APPLICATION

Home   Create   Applications ▾   Import ▾   Eligibility ▾   Documents   Help   Reports ▾   Administration ▾   Hello leah.fusari@icf.com ▾

Application Sections
Project Information
Improvements
- Detail List
Supporting Documents
Summary & Submit

IMPROVEMENTS SUMMARY

This page provides a summary of the improvements included in this application. To apply for an improvement, please select the appropriate categories below.

⊕ **Add Old AHRI Standard**	
Total Old AHRI Standard Rebate	$0.00

⊕ **Add Smart Thermostats**	
Total Smart Thermostats Rebate	$0.00

⊕ **Add New AHRI 2 Efficiency**	
Total New AHRI 2 Efficiency Rebate	$0.00

Total Estimated Rebate	$0.00

[Continue]   [Cancel]

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Adding Equipment: Select Equipment Type

MIDSTREAM: REBATE APPLICATION

Home   Create   Applications ▾   Import ▾   Eligibility ▾   Documents   Help   Reports ▾   Administration ▾   Hello leah.fusari@icf.com ▾

Application Sections
Project Information
Improvements
Supporting Documents
Summary & Submit

ADD NEW AHRI 2 EFFICIENCY

Select Equipment Type:

Equipment Type
Select a Value   ⌄

Continue   Cancel

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Adding Equipment

Application Sections

- Project Information
- **Improvements**
- Supporting Documents
- Summary & Submit

ADD NEW AHRI 2 EFFICIENCY

Select Equipment Type:

Equipment Type
Central AC Split System

Date Installed

Purchase Date

Is ECM Installed?
Select a Value

Install Type
Select a Value

$ Dealer Incentive Requested

$ Installed Cost

Existing Unit Replaced Is
Select a Value

Tons

AHRI Certified Ref Num

BTU Cool

SEER 2

EER 2

- Complete all information, as required.
- Some items are drop down selections.
- "Installed cost= equipment cost from distributor
- **NOTE:** Different Equipment Selections will have different fields to complete.

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Adding Equipment (cont.)

Furnace Model

Outdoor Manufacturer

Outdoor Model Number

Outdoor Serial Number

Indoor Manufacturer

Indoor Model Number

Indoor Serial Number

Model Status
Select a Value ⌄

$ **Customer Incentive per unit**

Age of Existing Equipment

Continue   Cancel

- Click continue when done.

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Reviewing Equipment Entered

Add Old AHRI Standard			
Total Old AHRI Standard Rebate		$0.00	

Add Smart Thermostats			
Total Smart Thermostats Rebate		$0.00	

Add New AHRI 2 Efficiency			
Name	Complete	Rebate Amount	Action
Central AC Split System	✓		▾
Total New AHRI 2 Efficiency Rebate			

Total Estimated Rebate	

- Rebate amount will **calculate** based on equipment type (and tier level).
- Select **Action** dropdown to Edit or Delete equipment measure.

- Total Rebate amounts, which will populate, reflect total incentive per unit, which may differ from incentive offered to contractor per **Distributor instruction.**

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Uploading Documentation - Optional
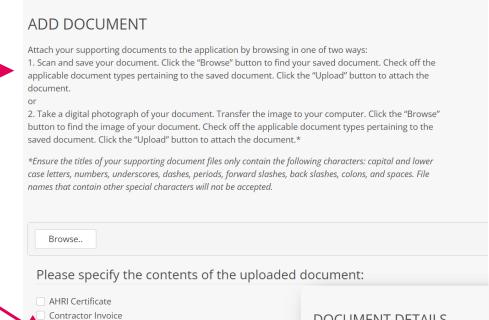
- Uploading any documentation is **Optional.**

- Click Add Document

- Select Continue to move on

DOCUMENT DETAILS

For fastest processing of your application please upload your supporting documents below.

- AHRI Certificate
- Contractor Invoice

Add Document

File Name	File Size	Action
No supporting documents uploaded.		

Continue   Cancel

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Uploading Documentation - Optional

- Follow the instructions to find and add your document then click Upload.

ADD DOCUMENT

Attach your supporting documents to the application by browsing in one of two ways:
1. Scan and save your document. Click the "Browse" button to find your saved document. Check off the applicable document types pertaining to the saved document. Click the "Upload" button to attach the document.
or
2. Take a digital photograph of your document. Transfer the image to your computer. Click the "Browse" button to find the image of your document. Check off the applicable document types pertaining to the saved document. Click the "Upload" button to attach the document.*

Ensure the titles of your supporting document files only contain the following characters: capital and lower case letters, numbers, underscores, dashes, periods, forward slashes, back slashes, colons, and spaces. File names that contain other special characters will not be accepted.

Browse..

Please specify the contents of the uploaded document:

☐ AHRI Certificate
☐ Contractor Invoice

Upload   Cancel

- Click Add Document again to add another document or click Continue to move on.

DOCUMENT DETAILS

For fastest processing of your application please upload your supporting documents below.

📄 AHRI Certificate
✅ Contractor Invoice

Add Document

File Name	File Size	Action
Test invoice.pdf	26 KB	▾

Continue   Cancel

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Review & Submit

- **Review** application summary including:
  - Equipment Installed
  - Quantity Installed
  - Documents Uploaded

- **IMPORTANT!**

Check "*I certify…*" statement to validate application.

Note: Your application will not be sent if this box is not checked before you submit.

Click Submit

APPLICATION SUMMARY

Please review the application summary before submitting.

Residential Midstream HVAC

Improvements	Quantity
Central AC Split System	1

The following documents were included:

✅ Contractor Invoice

File Name	File Size
Test invoice.pdf	26 KB

The following documents were not included and may be required:

📄 AHRI Certificate

☑ **I certify all items are currently planned to be completed at the address listed on this application. I further certify that all statements made in this application are true and correct.**

Submit

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Confirmation Page

MIDSTREAM: REBATE APPLICATION

Home   Create   Applications ▾   Import ▾   Eligibility ▾   Documents   Help   Reports ▾   Administration ▾   Hello leah.fusari@icf.com ▾

Thank you for your submission

Application Information

Project Address	dfgndfg, , MD 00000
Email	sdfgbfds@srdtgs.comf
Date Submitted	01/19/2024

Application ID: _____ _3049

Residential Midstream HVAC

Improvements	Quantity
Central AC Split System	1

Return to [Application List](#)

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Confirmation Email

Thank you for your submission

We will contact you if any additional information is needed for processing.

Your rebate summary is provided below. We suggest that you print a copy of this page for your records.

Application Information

Application ID: _91120
Address: 1 Winterfell Ln The North, MD 12345
Phone Number: (555)555-5555
Date Submitted: 02/05/2021

Improvements

Improvements
Heat Pump Water Heater (55 gallons or under)

Residential HVAC & HPWH:
Midstream Online Intake Tool Access Overview
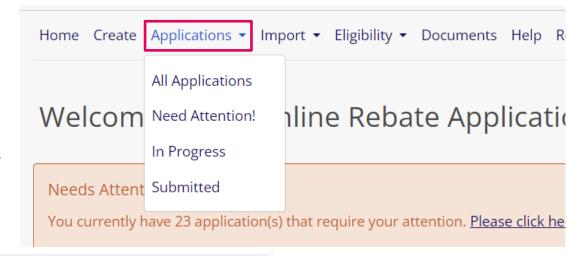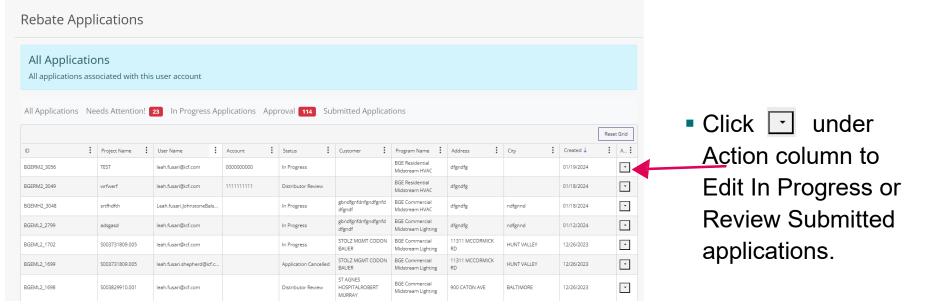ICF proprietary and confidential. Do not copy, distribute, or disclose.

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View Application Status

Application List
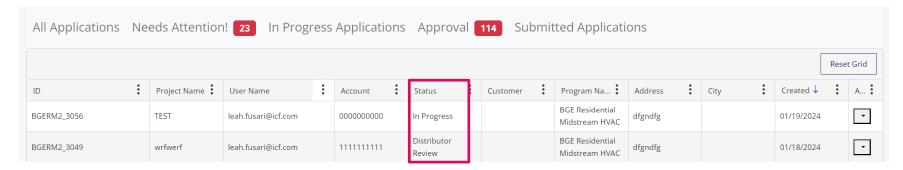
- Click on **Applications** on the top menu to jump to a set of applications

- Click ⋮ on any column to sort or filter your application list

Rebate Applications

All Applications
All applications associated with this user account

All Applications | Needs Attention! 23 | In Progress Applications | Approval 114 | Submitted Applications

ID	Project Name	User Name	Account	Status	Customer	Program Name	Address	City	Created ↓	A...
BGERM2_3056	TEST	leah.fusari@icf.com	0000000000	In Progress		BGE Residential Midstream HVAC	dfgndfg		01/19/2024	⌄
BGERM2_3049	wrfwerf	leah.fusari@icf.com	1111111111	Distributor Review		BGE Residential Midstream HVAC	dfgndfg		01/18/2024	⌄
BGEMH2_3048	srtfhdfth	Leah.fusari.JohnstoneBals...		In Progress	gbndfgnfdnfgndfgnfd dfgndf	BGE Commercial Midstream HVAC	dfgndfg	ndfgnnd	01/18/2024	⌄
BGEML2_2799	adsgasd	leah.fusari@icf.com		In Progress	gbndfgnfdnfgndfgnfd dfgndf	BGE Commercial Midstream Lighting	dfgndfg	ndfgnnd	01/12/2024	⌄
BGEML2_1702	S003731809.005	leah.fusari@icf.com		In Progress	STOLZ MGMT CODON BAUER	BGE Commercial Midstream Lighting	11311 MCCORMICK RD	HUNT VALLEY	12/26/2023	⌄
BGEML2_1699	S003731809.005	leah.fusari.shepherd@icf.c...		Application Cancelled	STOLZ MGMT CODON BAUER	BGE Commercial Midstream Lighting	11311 MCCORMICK RD	HUNT VALLEY	12/26/2023	⌄
BGEML2_1698	S003829910.001	leah.fusari@icf.com		Distributor Review	ST AGNES HOSPITALROBERT MURRAY	BGE Commercial Midstream Lighting	900 CATON AVE	BALTIMORE	12/26/2023	⌄

- Click ⌄ under Action column to Edit In Progress or Review Submitted applications.

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Application Statuses

- **In Progress** – Application has not been submitted yet.

  Be sure to go back and check for missing information and click the "I certify…" box to submit.

- **Distributor Review** – Application has been submitted by a Contractor and is ready for Distributor Review

- **Distributor Unconfirmed** – Application reviewed by Distributor but missing information for payment (Contractor is sent flaw reminder emails to correct issues, loops back into Distributor Confirmed status once re-reviewed)

- **Distributor Confirmed** – Distributor has reviewed and confirmed application for payment processing

- **Application Received** – Distributor has submitted application, and it is ready for payment processing

- **Application Completed** – Check has been issued

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Categories

- **All Applications:** Contains All Applications in the system that have your company selected as the distributor.

- **Needs Attention!**: Contains applications that have been flawed for some reason. These will need to be addressed before they can be processed.

- **In Progress Applications:** Contains applications that have been started but have not been submitted yet.

- **Approval*:** Contains applications in Distributor Review status which need approval.

*This status will only be visible if you are signed in as a Distributor. Contractors will not see this status.

- **Submitted Applications:** Contains applications that you have submitted.

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Bulk Uploads

BGE Residential Midstream OIT
Application Process Overview

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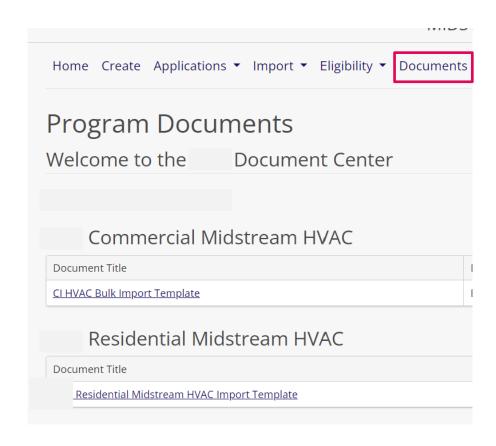
Bulk Import Spreadsheet

- You can find the Bulk Import Template in the **Documents** section.
- The Bulk Import Template contains the same field inputs as a one-off application.
- Each sale should be entered in its own row.
- **Project ID** and **Project Name** can be whatever you want, we recommend entering the address
- After you've entered all the information, save the file to your computer – you will need it to upload it in the next step.

Home   Create   Applications ▾   Import ▾   Eligibility ▾   Documents

Program Documents

Welcome to the   Document Center

Commercial Midstream HVAC

Document Title
CI HVAC Bulk Import Template

Residential Midstream HVAC

Document Title
Residential Midstream HVAC Import Template

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Bulk Import Selection

Home   Create   Applications ▾   Import ▾   Documents   Help

- **Bulk Import**: This is where you will upload your saved spreadsheet from the previous step

- **Bulk Document:** You can "bulk attach" files here. Because document uploads are optional, it is **strongly recommended** that you skip this step (use the single-create feature if you need to upload documents)

Import ▾   Documents

Bulk Import
Bulk Document
Bulk Submit

- **Bulk Submit: Don't forget this step!** After importing your spreadsheet, you will need to go here to submit your projects, otherwise they will be stuck in limbo!

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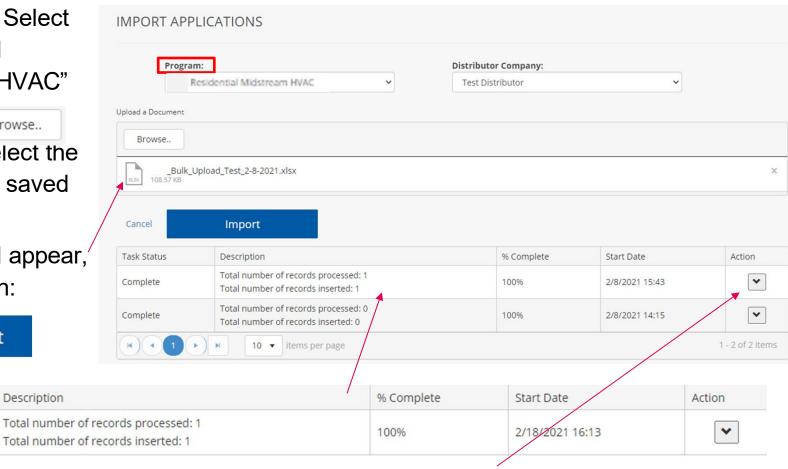
Step 1: Bulk Import

- **Program:** Select "Residential Midstream HVAC"

- Click on [Browse..] and then select the file that you saved earlier.

- Your file will appear, then click on:

  [Import]

IMPORT APPLICATIONS

Program:		Distributor Company:
Residential Midstream HVAC ⌄		Test Distributor ⌄

Upload a Document

[Browse..]

	_Bulk_Upload_Test_2-8-2021.xlsx	×
XLSX	108.57 KB	

Cancel [Import]

Task Status	Description	% Complete	Start Date	Action
Complete	Total number of records processed: 1 Total number of records inserted: 1	100%	2/8/2021 15:43	⌄
Complete	Total number of records processed: 0 Total number of records inserted: 0	100%	2/8/2021 14:15	⌄
⇤ ◂ **1** ▸ ⇥ 10 ⌄ items per page				1 - 2 of 2 items

Task Status	Description	% Complete	Start Date	Action
Complete	Total number of records processed: 1 Total number of records inserted: 1	100%	2/18/2021 16:13	⌄

- After clicking "Import," your file will appear below. Click ⌄ to "Delete" your file or "Show Errors" if any are listed.

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Step 2: Bulk Submit

Midstream: Rebate Application

Home   Create   Applications ▾   Import ▾   Documents   Help   Your Account ▾

BULK SUBMIT APPLICATIONS

Viewing 1 out of 1 applications. Only these applications will be submitted.

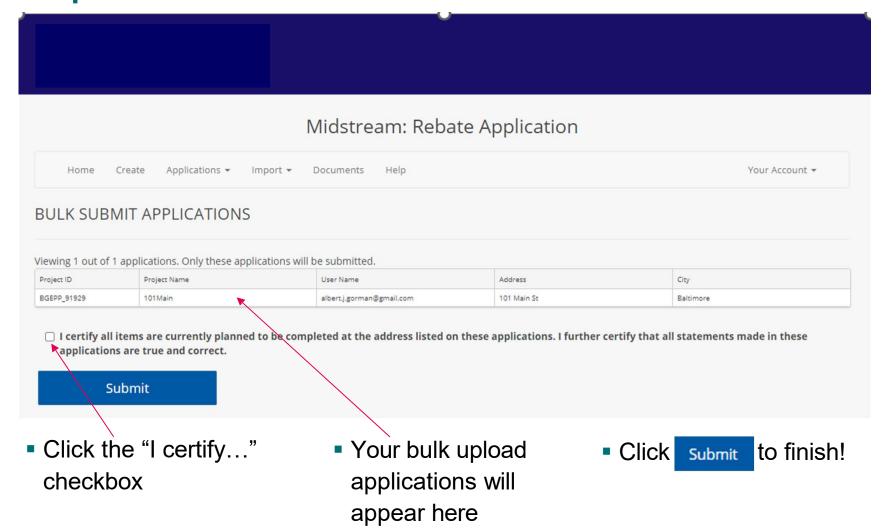| Project ID	Project Name	User Name	Address	City
BGEPP_91929	101Main	albert.j.gorman@gmail.com	101 Main St	Baltimore

☐ **I certify all items are currently planned to be completed at the address listed on these applications. I further certify that all statements made in these applications are true and correct.**

Submit

- Click the "I certify…" checkbox

- Your bulk upload applications will appear here

- Click Submit to finish!

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Midstream Online Intake Tool Access Overview
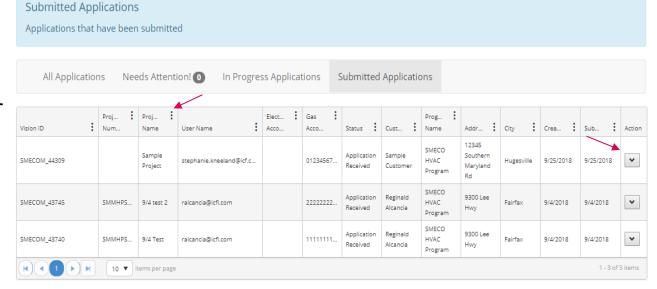ICF proprietary and confidential. Do not copy, distribute, or disclose.

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Project Navigation: Rebate Application Tracking

- Click on In Progress or Submitted icons or drop-down option from "Applications" on top menu bar to **jump to** a set of applications

CREATE NEW APPLICATION	IN PROGRESS	SUBMITTED

- Rebate Applications overview page allows for easy sorting and navigation by status

- Click ⋮ on any column to sort or filter your application list

- Click ⌄ under Action column to Edit *In Progress* or Review *Submitted* apps
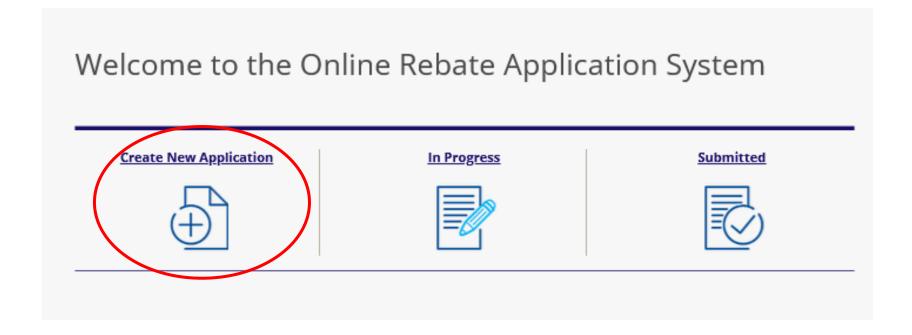
REBATE APPLICATIONS

Submitted Applications
Applications that have been submitted

All Applications	Needs Attention! 0	In Progress Applications	Submitted Applications

Vision ID	Proj... Num...	Proj... Name	User Name	Elect... Acco...	Gas Acco...	Status	Cust...	Prog... Name	Addr...	City	Crea...	Sub...	Action
SMECOM_44309		Sample Project	stephanie.kneeland@icf.c...		01234567...	Application Received	Sample Customer	SMECO HVAC Program	12345 Southern Maryland Rd	Hugesville	9/25/2018	9/25/2018	⌄
SMECOM_43745	SMMHPS...	9/4 test 2	ralcancia@icfi.com		22222222...	Application Received	Reginald Alcancia	SMECO HVAC Program	9300 Lee Hwy	Fairfax	9/4/2018	9/4/2018	⌄
SMECOM_43740	SMMHPS...	9/4 Test	ralcancia@icfi.com		11111111...	Application Received	Reginald Alcancia	SMECO HVAC Program	9300 Lee Hwy	Fairfax	9/4/2018	9/4/2018	⌄

|◄ ◄ 1 ► ►| 10 ▼ items per page   1 - 3 of 3 items

Residential HVAC & HPWH:
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Creating a New HPWH Application

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Creating a New HPWH Application

- Click on **Create** from menu Or **Create New Application** +

Residential HVAC & HPWH:
Midstream Online Intake Tool Access Overview
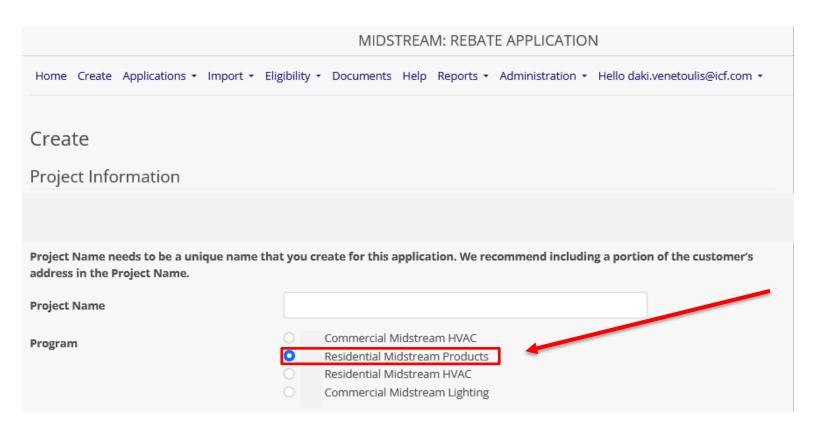ICF proprietary and confidential. Do not copy, distribute, or disclose.

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Choosing The Correct Program

▪ **Important:** If you have multiple program options, make sure you select the correct one. If you don't see the program or utility you need, please contact your distributor.

For this example: **Residential Midstream <u>Products</u>**
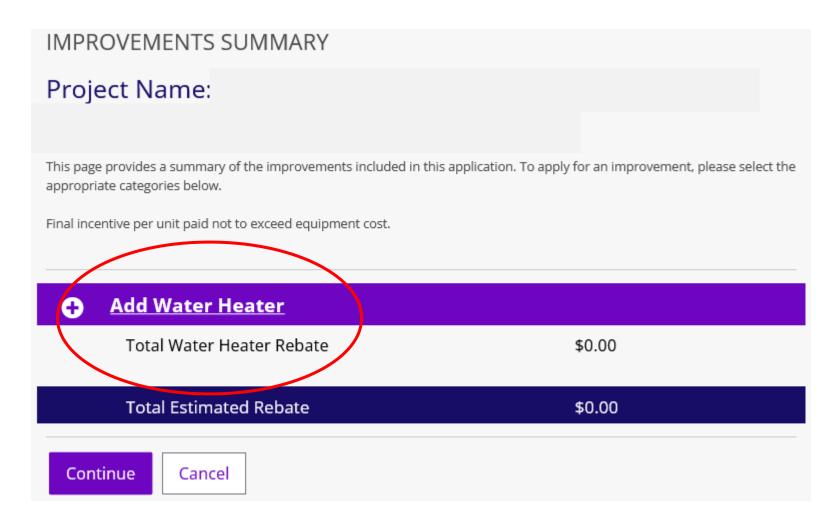
MIDSTREAM: REBATE APPLICATION

Home   Create   Applications ▾   Import ▾   Eligibility ▾   Documents   Help   Reports ▾   Administration ▾   Hello daki.venetoulis@icf.com ▾

Create

Project Information

Project Name needs to be a unique name that you create for this application. We recommend including a portion of the customer's address in the Project Name.

Project Name

Program
- ○ Commercial Midstream HVAC
- ● Residential Midstream Products
- ○ Residential Midstream HVAC
- ○ Commercial Midstream Lighting

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Choose Your Equipment – Improvements Summary

▪ Click Add Water Heater

IMPROVEMENTS SUMMARY

Project Name:

This page provides a summary of the improvements included in this application. To apply for an improvement, please select the appropriate categories below.

Final incentive per unit paid not to exceed equipment cost.

⊕ **Add Water Heater**

Total Water Heater Rebate $0.00

Total Estimated Rebate $0.00

Continue   Cancel

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Select Equipment Details

ADD WATER HEATER

Select Equipment Type:

Equipment Type
Heat Pump Water Heater (55 gallons or under)   ∨

Purchase Date   📅

Install Date   📅

Manufacturer

Model

Serial Number

$ | Equipment Cost

[Continue] [Cancel]

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Add Supporting Documents

DOCUMENT DETAILS

For fastest processing of your application please upload your supporting documents below.

We highly recommend uploading your DISTRIBUTOR invoice to your application(s), showing model and serial numbers for the equipment purchased. While not required, this can assist in resolving possible flawed applications quickly, decreasing payment processing time.

Supporting Document

Add Document

File Name	File Size	Action

Continue   Cancel

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Review & Submit

- **Review** application summary including:

  - Equipment Installed
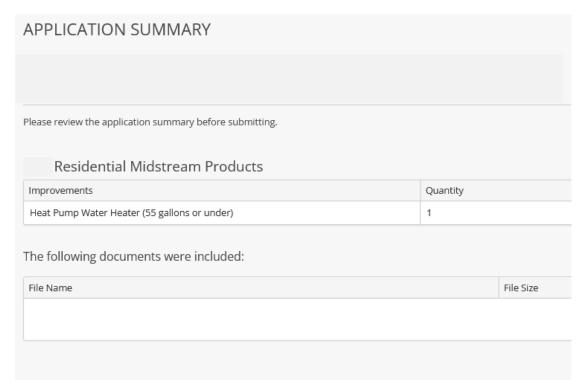 - Quantity Installed
  - Documents Uploaded

- **IMPORTANT!**

Check "*I certify…*" statement to validate application.

Note: Your application will not be sent if this box is not checked before you submit.

Click Submit

APPLICATION SUMMARY

Please review the application summary before submitting.

Residential Midstream Products

Improvements	Quantity
Heat Pump Water Heater (55 gallons or under)	1

The following documents were included:
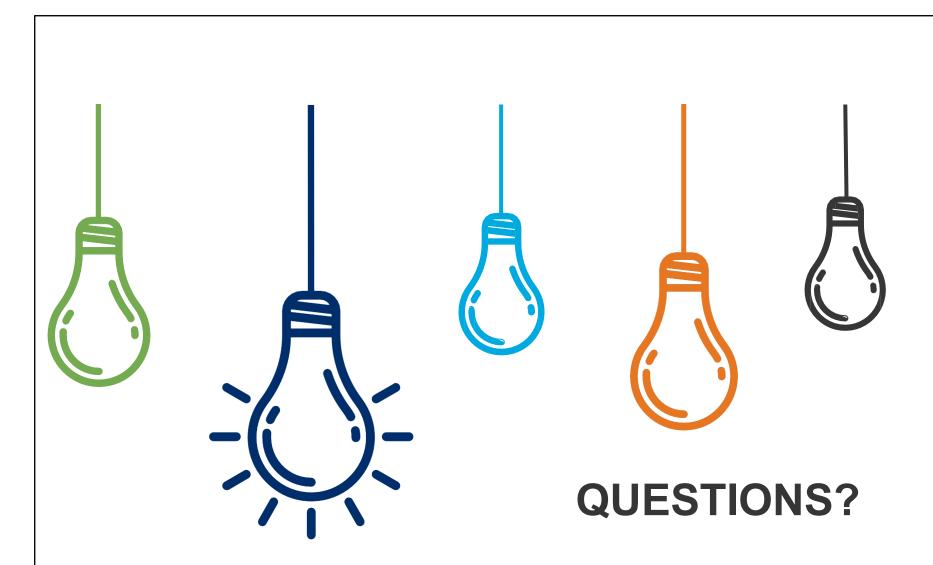
File Name	File Size

The following documents were not included and may be required:

- Supporting Document

✓ I certify all items are currently planned to be completed at the address listed on this application. I further certify that all statements made in this application are true and correct.

Submit

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QUESTIONS?

Contact our Team at: marylandmidstream@icf.com