

Rebate application process

Puget Sound Energy's rebate application process was brought online using a third party vendor. The process was many steps and difficult to stay on the path.

I brought this to a UX writing class at School of Visual Concepts to workshop. The results are from class exercises only.

I focused on what the copy could do to provide a clearer path to completing the application.



Welcome christie.peterson@pse.com | Logout
Having problems with your application?
Call an Energy Advisor at 1-800-562-1482,
Monday through Friday from 8 a.m. to 5 p.m. Or email rebates@pse.com

Eligible Rebates & Incentives

ELIGIBLE REBATES (7) MY REBATES

Residential (7)

Electric home heating



- Heat pumps
- Ductless heat pumps
- Geothermal heat pumps

Apply Now

Electric water heating



- Heat pump water heater

Apply Now

Home Performance with ENERGY STAR®



- Home Performance with ENERGY STAR® Rebate

Apply Now

Natural gas fuel conversion



- Home and water heat
- Home heat only
- Water heat only

Apply Now

Natural gas home heating



- Forced-air furnace
- Fireplace
- Integrated space and water heat system

Apply Now

Windows



- Energy-efficient windows

Apply Now

Arrive at site via SSO from pse.com

Welcome! Here are available rebates for your account.

Available Rebates

My Rebates

Residential (7)

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Electric water heating



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Home Performance with ENERGY STAR®



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Natural gas home heating



- Forced-air furnace
- Fireplace
- Integrated space and water heat system

Windows



- Energy-efficient windows

Changed tab names and header to friendlier language. Removed 'Apply Now' button for redundancy.

Electric Home Hea... Customer & Payee... Home and Install... Invoice/Receipt ...

Electric Home Heating Rebates

[removed the first text string] Select your rebate, then click the orange "Add" button.

Select Rebate

- Electric Forced-Air Furnace to Heat Pump Conversion - \$1500
- Air-Source Heat Pump Tier 2 [9.0 HSPF/14 SEER] - \$350
- Air-Source Heat Pump Tier 2 [10.0 HSPF/14 SEER] - \$350

Add

Cancel Save as Draft Back **Continue**

Electric home heating rebates Customer and payee information Home and installation information Invoice/Receipt upload

Electric Home Heating Rebates

. Select your rebate, then click the orange "Add" button.

Select Rebate

- Air-Source Heat Pump Tier 2 [9.0 HSPF/14 SEER] - \$350
- Air-Source Heat Pump Tier 3 [10.0 HSPF/16 SEER] - \$800
- HSPF Heat Pump Single & LoadOut - \$200

Electric Forced-Air Furnace to Heat Pump Conversion - \$1500

Qualifications:

- You must be a current PSE residential electric customer.
- You must use an existing electric forced-air furnace as your primary source of space heating.
- You must upgrade to an air-source heat pump system that is AHRI Certified® with an 8.5 HSPF/14 SEER rating or better.
- This rebate is only available on new, qualifying equipment.
- If you have an existing gas furnace or boiler, you are not eligible for this rebate.

Please confirm you reviewed the eligibility requirements: *

Cancel Save as Draft Back **Continue**

Made progress arrows legible instead of persistent ellipses.



Electric Home Hea... Customer & Payee... Home and Install... Invoice/Receipt ...

Home and Installation Information

- Structures with 4 units or less attached by a contiguous roofline, including duplexes and manufactured or factory built homes, are considered single family structures.
- New construction is not covered under single-family existing programs.
- Structures with 5 units or more attached by a contiguous roofline are considered multifamily structures.

Type of Home: Year Built:

What did you use to heat your home (prior to new equipment installation): What type of heating system did you have in your home (prior to new equipment installation):

Self-installation?:

I don't have this information available.

This info is not needed to submit the rebate, but might be needed later. Added clear option for customer to by-pass.



Electric Home Hea... Customer & Payee... Home and Install... Invoice/Receipt ...

Invoice/Receipt Upload

Your installation invoice or receipt must include an installation date, brand and model number of all rebated equipment.

Invoice/Receipt Upload: * [Browse](#) [Upload](#)

No Documents Selected.

Date of equipment installation: * 📅

[Cancel](#) [Save as Draft](#) [Back](#) [Review](#)

Electric home heating rebates Customer and payee information Home and installation information Invoice/Receipt upload

Invoice/Receipt Upload

Your installation invoice or receipt must include an installation date, brand and model number of all rebated equipment.

Invoice/Receipt Upload: *

lsuanjstirus.pdf

Date of equipment installation: *

Legible progress bars

Review your application

Thank you for submitting your rebate application!

- You will receive an email notification with a tracking number.
- Please allow 6-8 weeks to receive your rebate.

Submit

Cancel

Review

Invoice/Receipt

Review your application



Thank you for completing your rebate application!

- You will receive an email notification with a tracking number.
- Please allow 6-8 weeks to receive your rebate.

Corrected headline.
Customer hasn't actually
submitted yet. Made
submit button friendlier.

Get my rebate


Cancel

Review


Invoice/Receipt Upload


Your installation invoice or receipt must include an installation date, brand and model number of all rebated equipment.

Invoice/Receipt Upload: * **Browse** **Upload**

LsdaFkjsldfdfs.pdf 


Date of equipment installation: *

Confirmation 

 Thank you!
We have received your rebate application.
Your tracking number is 00000295206.

OK

as Draft **Back** **Review**

 Save Successful.



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Welcome! Here are available rebates for your account.

Available Rebates	My Rebates
Sort By: Last Updated Date Tracking Number Program Name All Completed Submitted Draft	
Page 1 of 1	
Electric home heating IN PROGRESS Last Updated Date : Nov 17 2016, 1:38 PM PST Customer Info : GERALD K HODGE 4570 AVERY LN SE C,Lacey,WA,98503 Site : 8311 SUMMERWOOD DR SE,Olympia,WA,98513	Tracking Number: 0000295206 Application Status: In Progress Submit Date: 11/17/2016
Tasks	
Electric home heating IN PROGRESS Last Updated Date : Nov 14 2016, 7:57 AM PST Customer Info : GERALD K HODGE 4570 AVERY LN SE C,Lacey,WA,98503 Site : 8311 SUMMERWOOD DR SE,Olympia,WA,98513	Tracking Number: 0000286807 Application Status: In Progress Submit Date: 11/10/2016
Tasks	
Natural gas home heating IN PROGRESS Last Updated Date : Nov 10 2016, 7:28 PM PST Customer Info : GERALD K HODGE 4570 AVERY LN SE C,Lacey,WA,98503 Site : 8311 SUMMERWOOD DR SE,Olympia,WA,98513	Tracking Number: 0000286708 Application Status: In Progress Submit Date: 11/10/2016
Tasks	
Windows IN PROGRESS Last Updated Date : Oct 25 2016, 3:24 PM PDT Customer Info : GERALD K HODGE 4570 AVERY LN SE C,Lacey,WA,98503 Site : 8311 SUMMERWOOD DR SE,Olympia,WA,98513	Tracking Number: 0000276408 Application Status: In Progress Submit Date: 10/25/2016
Tasks	
Home Performance with ENERGY STAR® SUBMITTED Last Updated Date : Oct 25 2016, 1:51 PM PDT Customer Info :	Tracking Number: 0000276307 Application Status: Submit Date: 10/25/2016

Finished state.