Clean Energy Communities

Clean Energy Communities

This guide provides instruction for elected officials or employees of local governments across New York State when submitting High Impact Action items for the purpose of participation in the Clean Energy Community Program. It also provides guidance for communities when submitting a grant application through the program.

Local governments in New York State can use the Clean Energy Communities program to implement clean energy actions, save energy costs, create jobs, and improve the environment. In addition to providing tools, resources, and technical assistance, the program recognizes and rewards leadership for the completion of clean energy projects.

Designated Clean Energy Communities are also able to apply for further grants to implement additional clean energy actions. To be eligible for these grants, Clean Energy Communities can submit Custom, Pre-Approved and Direct-to-Voucher proposals. This guide also reviews how to submit these types of proposals. Complete information on how to become designated as a Clean Energy Community can be found on The Clean Energy Communities Program on the NYSERDA Portal.

For questions about the contents of this guide, please contact the Clean Energy Communities Coordinator at cec@nyserda.ny.gov.

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High Impact Action Submission

Introduction

NYSERDA has developed a list of high-impact actions that communities can take to save energy and improve the environment. Information on how to meet requirements for each action, and what documentation is required, is provided in the CEC Leadership Round Guidance Document. Toolkits for each high-impact action, including step-by-step guidance, template legislation, calculators and other resources are available at nyserda.ny.gov/cec.

To earn credit for completing High Impact Actions, follow the instructions on this page to submit action item documentation. NYSERDA will review the submitted documentations and provide notification that is has been approved or if it is incomplete and needs to be resubmitted.

Instructions

1. Navigate to the High Impact Action Submission online form on the NYSERDA Portal.

2. At the top of the form, select your **County**, **Community**, and **High Impact Action** item from the **Choose Your County**, **Choose Your Community**, and **Choose Your High Impact Action** pick lists, respectively.

Choose Your County	Choose Your Community	Choose Your High Impact Action
Albany ▾	Albany County ▾	LED Street Lights ▾

3. Upload required documentation for the selected High Impact Action Item as listed in the **Required Documents** section. Click the **Choose File** button for each required document to upload to the online form.

   ### Required Documents

   Upload documentation. Full details on compliance, submission, and necessary documentation are available on the High Impact Action reference page.

Document Name	Description	Action
LED Street Light Calculator	The LED Street Light Calculator is available for download in the LED Street Light Toolkit.	Choose File No file chosen

   ⊘ Complete details regarding compliance, documentation and submission requirements can be found by clicking the **High Impact Action reference page** link in the **Required Documents** section of the page.

4. Upload additional supporting documentation in the **Optional Documents** section by clicking **Add Another Document** . Be sure to include both the **Document Name** and **Description** when uploading documents.

   ### Optional Documents

Document Name	Description	Action
⊕ ADD ANOTHER DOCUMENT		

5. Complete all **Submitter Information** fields, including any additional comments and the approximate date the High Impact Action item was completed.

First Name	Last Name

Title	Phone

Email

Comments

Please enter the date that 50 percent of your community's street lights were converted to LEDs or, for those communities with less than 20 streetlights, 10 fixtures were converted to LED.

[7/2/2020]

6. Click **Submit** after completing the online form.

By clicking submit, I certify that I am authorized to provide these documents on behalf of Albany County and that all of the information is true and correct to the best of my knowledge.

CANCEL   SUBMIT

7. A message confirming the submission will display.

Clean Energy Communities Home   NYSERDA Portal Registration

NYSERDA Portal Registration

Introduction

Communities that have been designated as **Clean Energy Communities** are eligible to submit grant applications for additional clean energy project funding via the **NYSERDA Portal** and must have an established account.

The **NYSERDA Portal** is an external facing component of **Salesforce.**

Registering a New Portal Account

1. To register a new account on the **NYSERDA Portal**, navigate to the following site: nyserda.ny.gov/cec

2. Scroll down to the **How to Apply** section and click the **Online Application for Additional Funding** link.

3. When the Clean Energy Communities Program page loads, click the **Apply Online** link underneath the **Application Submission** section.

4. Click the **Create an Account** link on the NYSERDA Portal Login page. Communities that have previously registered an account on the NYSERDA Portal can use this page to login.

5. Complete all required fields in the **Company**, **Contact** and **Password** information sections on the **Portal Registration** window.

6. When all fields are complete, click the **Create** button at the bottom of the page.

> ⚠️ When you click the **Create** button, you are establishing an account on the NYSERDA Portal.

High Impact Action Submission   Clean Energy Communities Home   Transferring NYSERDA Portal Access

Transferring NYSERDA Portal Access

Introduction

There are instances in which NYSERDA Portal Access must be transferred to an alternate Community Representative, such as when there is a change with who the community chooses as their Community Representative for Clean Energy Community programs. This page provides guidance for communities when requesting a change of this type.

Instructions

To request a change to the Community Representative who has access to the NYSERDA Portal, please **email the Project Manager** assigned to your community. Be sure to provide all relevant information necessary for this change, including the new Community Representative's:

- Full Name
- Email Address
- Effective Date

NYSERDA Portal Registration   Clean Energy Communities Home   Accessing the NYSERDA Portal

Accessing the NYSERDA Portal

Introduction

Accessing the NYSERDA Portal is a required step when a community wishes to submit additional proposals as part of the Clean Energy Communities Programs. In order to access the NYSERDA Portal, communities must first establish an account following the NYSERDA Portal Registration instructions.

⊘ Please contact salesforcesupport@nyserda.ny.gov if you need assistance logging in.

Instructions

1. Access the portal login page at https://portal.nyserda.ny.gov/login.

2. Enter your **Username** and **Password**.

| User name:	Your username is the email address used when creating your **NYSERA Portal (Salesforce)** account with **.nyserda** added to the end as shown in the example screenshot above
Password:	You created this password when registering for the **NYSERDA Portal (Salesforce)** account. If you have forgotten the password, click the **Forgot Your Password?** Link and follow the prompts to reset your password.

Proposal Submission

Introduction

If your community received an email notification from NYSERDA indicating that your local government is eligible to apply for a grant under NYSERDA's Clean Energy Communities Program, and you would like to initiate the process, complete the steps below.

Instructions

1. Log into the **Clean Energy Communities Program** on the NYSERDA Portal. Directions to access this site can be found in Accessing the NYSERDA Portal.

2. After logging into the NYSERDA Portal, click the **Create a New Submission** button.
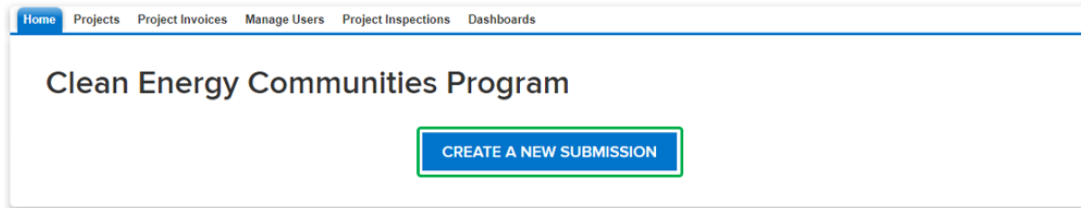
> ✓ If your community has previously submitted proposals, they will appear as a list above the **Create a New Submission** button. Unsubmitted proposals can be accessed and completed from this list.

3. On the first page of the online submittal form, click that **Add a Contact** button.
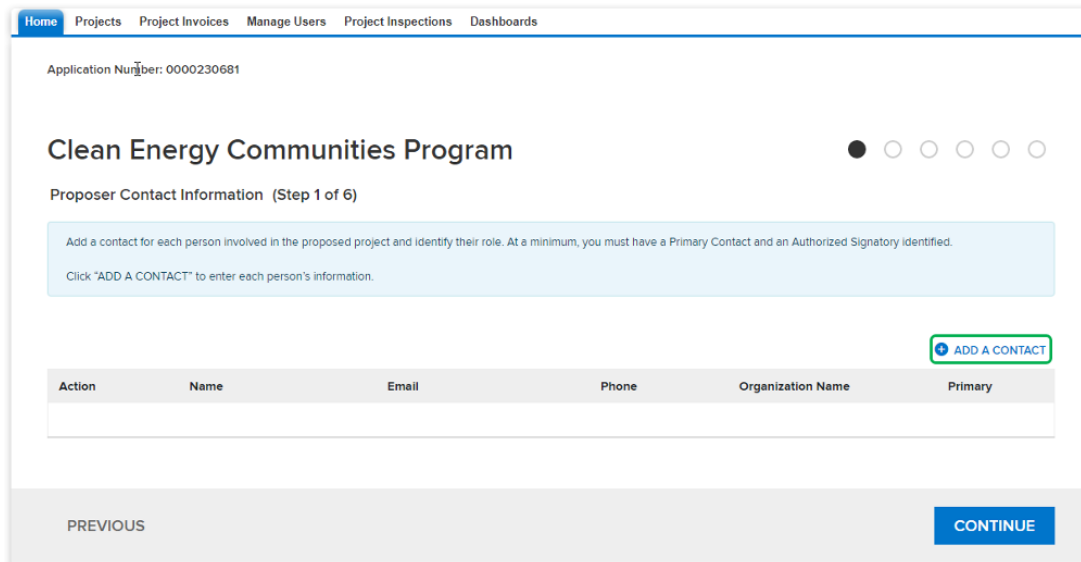
> ⊘ All proposal submittals require at least one contact to be added. This will be the point person that will work with NYSERDA throughout the submission, review, and approval process.

4. On the **Add a Contact** window, complete all required fields. Additional contacts can be added if necessary, though at least one contact must be designated as the **Primary Contact** and one contact must be designated as the **Contract Signer**. A single contact can be designated as both.

Add a contact   ×

Alternate Party   ☐   My Company is
                                        Outside of the United
Organization Name *   [_____] ❓ States & Canada   ☐

First Name *   [_____]   Address 1 *   [_____]

Last Name *   [_____]   Address 2   [_____]

Title   [_____]   City *   [_____]

Email *   [_____]   State *   [New York ▾]

Phone *   [(xxx) xxx-xxxx] ❓ Zip Code/Postal
                                        Code *   [_____]

Primary Contact   ☐   County   [--None-- ▾]

Contract Signer   ☐ ❓   DUNS Number   [_____] ❓

                                        ○ Employer Identification Number (EIN)
                        Tax identification type *
                                        ○ SSN

                                        Is this entity tax
                                        exempt?   ☐

                                              [CLOSE]   [SAVE CHANGES]

5. After completing all the required fields for a contact, click the **Save Changes** button. The Add a Contact window will close, returning you to the first page of the online submittal form.

6. After all contacts have been added, click the **Continue** button (shown on the screenshot in step 3 above) to advance to the second page of the online submittal form. You cannot advance to the next page of the online submittal form by clicking the **Continue** button if at least one contact has not been designated as a **Primary Contact** and a **Contract Signer**.

7. On the second page of the online submittal form, complete the **Proposal Information** section.

Field Name	Requirements
Proposal Title	Enter the title of the Proposal
Proposed Proposal Category	Select the appropriate option from the list. • **$5,000 or Less Grant:** This is any grant that is $5,000 or less. • **Pre-Approved Project:** Pre-approved projects include solar, electric vehicles, changing stations, LED street lights, or building upgrades that meet the specific requirements set forth in the CEC Grant Project Contract Template. • **Custom Project:** Custom projects are greater than $5,000 and deviate from the specific performance requirements for pre-approved projects. These projects are evaluated based on the criteria set forth in the CEC Guidance Document.
Proposer Company Information	Enter the name of your local government.
Proposal Description	Provide a 2-3 sentence description of the proposal.

8. Then complete the **Checklist Questions** section. All questions in the checklist are required and must be answered.

9. Finally, complete the **Disclosure of Prior Findings of Non-Responsibility** disclosure. Respond to the two required disclosures before continuing.

10. When all three sections are complete, click the **Continue** button at the bottom of the page to advance to the next page.

[PREVIOUS]   [SAVE]   [CONTINUE]

> ✅ If you cannot complete the proposal submittal in one sitting, click the **Save** button on any page in the online submittal form. The incomplete proposal can be accessed and completed after logging into the NYSERDA Portal and selecting the unsubmitted proposal from the list as referenced in Step 2 in this section of this training guide.

11. Read through the **Vendor Assurance of No Conflict of Interest or Detrimental Effect** disclosure and answer accordingly. Click the **Save** button when complete to advance to the next page.

12. On the **Proposal Budget** page, enter the grant amount specified by the Clean Energy Community team at NYSERDA in the **Proposed NYSERDA Cost** field. Grant amounts are only provided after a community has been designated as a Clean Energy Community. Click **Continue** to advance to the next page.

> ⚠️ The **Proposed Cost Share** field is not required; however, a community can still choose to document the amount of proposal funds that will be supplied by the community which will then be noted in their contract.

13. On the **Proposal Documents** page, upload the **Grant Application** and Commitment Letter by clicking the **Choose File** button for each.

⚠️ The documents outlined in the **Required Documents** section are standard for all **High Impact Action** submissions, regardless of the **High Impact Action** item selected earlier in this process.

14. Upload up to 10 additional optional documents in the **Optional Documents** section on the **Proposal Documents** page. The **Grant Application** outlines additional documents that will be required as part of the **High Impact Action** submission and vary based upon the **High Impact Action** item selected as part of the submission. If there are no **Optional Documents** to upload, click the **Continue** button to advance to the next page.

Optional Documents					
Document Name	Add / Update Document ❓		Recent Uploaded Document	Upload History	Status
Attachment 1	Choose File	No file chosen			
Attachment 2	Choose File	No file chosen			

15. The **Authorized Signature and Certification** page details a summary of the proposal. Review each section for accuracy. If information is incorrect, use the **Previous** button to return to previous pages, otherwise, scroll to the bottom of the page and check the **Certification** checkbox. Click **Continue** to advance to the last page.

☐ By checking this box and clicking Continue:

I certify that the above information, and all information submitted in connect with State Finance Law §139-j and §139-k, is complete, true, and accurate, that I have read and reviewed the Standard Terms and Conditions set forth in the attached Sample Agreement and that I accept all terms unless otherwise noted herein, and that the proposal requirements noted have been completed and are enclosed;

I affirm that I understand and will comply with NYSERDA's procedures under §139-j(3) and §139-j(6)(b) of the State Finance Law;

I understand that this proposal may be disqualified if the solicitation requirements are not met; and I am authorized to commit my organization to this proposal.

By submitting this application, I authorize NYSERDA and entities doing business on NYSERDA's behalf to add my information to the mailing lists and to share my information with other New York State government entities. My information will not be shared outside of New York State government, and I reserve the right to unsubscribe at any time.

PREVIOUS   PRINT   CONTINUE

16. The **Proposal Submission** page is the final page in the online submittal form. Click the **Submit** button to submit the proposal.

Home Projects Project Invoices Manage Users Project Inspections Dashboards

Application Number: 0000230610

Clean Energy Communities Program

Proposal Submission (Step 6 of 6)

You are about to submit your proposal paper. Proposals will only be received until the deadline issued in the solicitation. You must press the submit button to complete your submission. A green notification bar will appear, and a confirmation email will be sent to you when the submission is successful.

You are about to submit your proposal to the Clean Energy Communities Program. Proposals will only be received up to **09/30/2020** at **03:00 PM**. No Proposals will be allowed to be submitted after this date and time.

PREVIOUS   SUBMIT

17. If the proposal was successfully submitted, the following message will display:

Success! Proposal has been submitted.

18. Your submitted proposal will be reviewed by the **Clean Energy Community** team. If your proposal is approved, you will receive additional information regarding next steps. The proposal will also be converted into a **Project** in **Salesforce**.

Finding Your Project

Introduction

This page reviews how to use the Navigation Menu options to locate projects in your community.

Prerequisites

Begin by following the instructions in the Accessing the NYSERDA Portal

Instructions

Once logged into the **NYSERDA Portal**, click the **Projects** tab at the top of the screen. If your community has more than one **Project** with **NYSERDA** that uses **Salesforce**, you may see multiple **Projects** on this page.

A	If you do not see your **Project** listed, try changing the drop-down menu to **All**.
B	Clicking the **Refresh** button may also help locating an initially unlisted **Project**.
C	To access a Project, click on the **Project Name**.

Proposal Submission   Clean Energy Communities Home   Chatter Feed Messages

Chatter Feed Messages

Introduction

The **Chatter Feed** is on your **Project Page**. This is where you will communicate with your NYSERDA Project Manager and the external reviewer. Keeping communications in the **Chatter Feed** allows NYSERDA to respond quickly and track all sent and received communications that may be difficult to manage with an email application alone.

1. To post a message to the Chatter Feed, click the **Click here to expand the Post action** option, document your message and click the **Post** button.
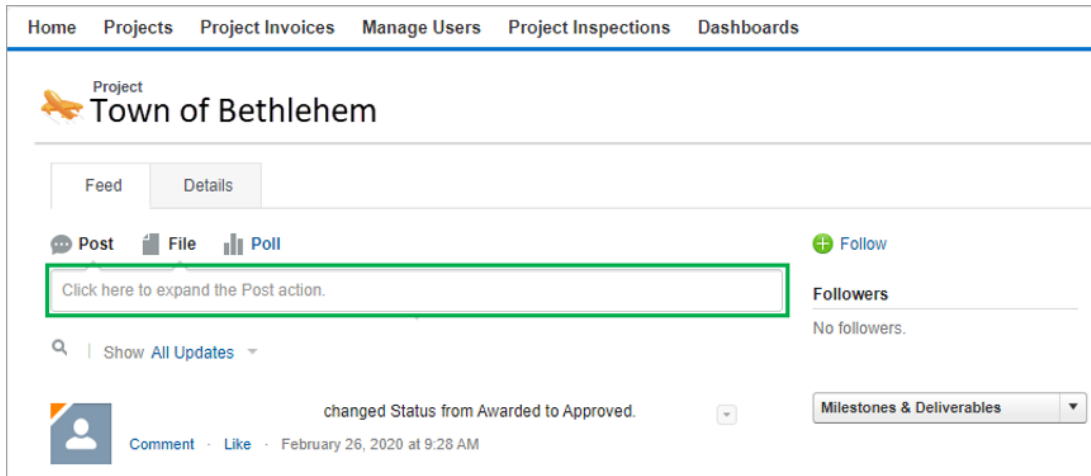
⚠ All previous posted messages appear below the **Post** section.

2. Document your message in the **Write Something** section and click the **Share** button.
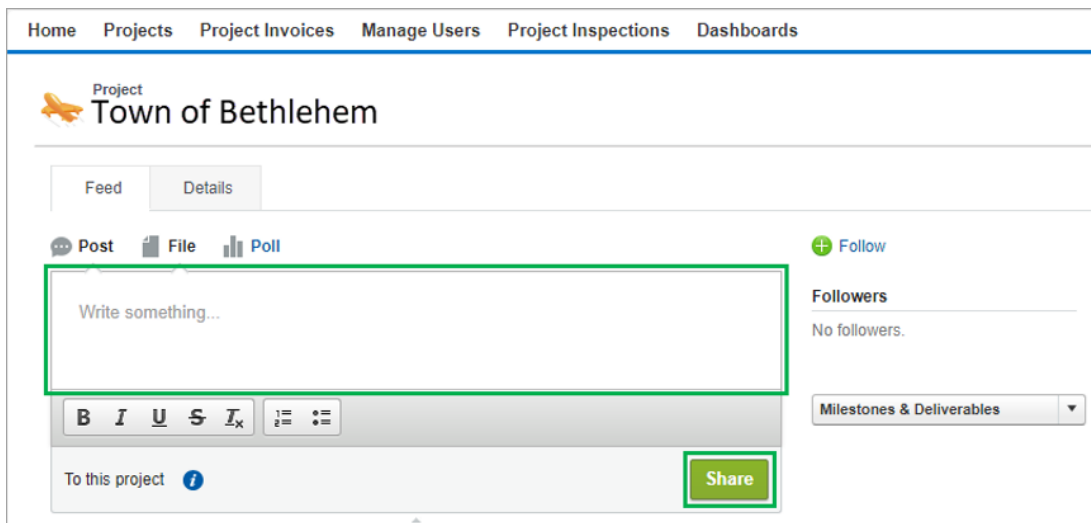
✓ You can **Tag** the External Reviewer and the NYSERDA Project Manager by typing the @ symbol then the name of the person you want to **Tag**. This will send a notification email the **Tagged** individuals to ensure that your message is received and viewed. This action can also be done when uploading a file.

3. To attach a file to the Chatter Feed, click the **File** tab, then click the **Choose File** button and locate the file on your computer.

⚠ Enter in any text that may be relevant when uploading the file, using @ mentions to **Tag** members of the CEC team that would want to know about the uploaded file.

4. When you are ready to post the file, click the **Share** button.

Finding Your Project   Clean Energy Communities Home   Milestones and Deliverables

Milestones and Deliverables

Introduction

Milestones and Deliverables, as defined in the Project Contract, are to be submitted and tracked on the Milestones and Deliverables page. Required Deliverables must be submitted to complete each Milestone.

For Custom Projects, there is Go/No-Go requirement associated with the Contract Milestone for each component of the Custom Project (see your Project Contract). Approval must be provided by the NYSERDA Project Manager before any funded equipment is purchased or the initiative is started.

1. Access the **Milestone & Deliverables** by clicking on the **Milestones & Deliverables** button from the **Feed** tab or from the **Details** tab.
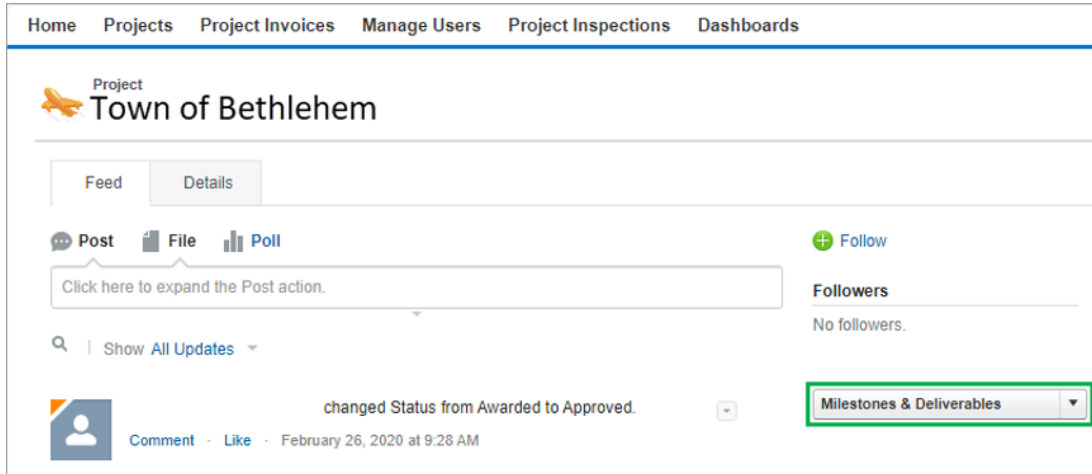
2. The **Milestones & Deliverables** page contains a table with the two **(2) Project Phases: Project Plan** and **Project Completion** . If your project contains multiple components, there will be two (2) Project Phases for each component. This page allows you to upload and submit deliverables as well as view and track the status of your progress.
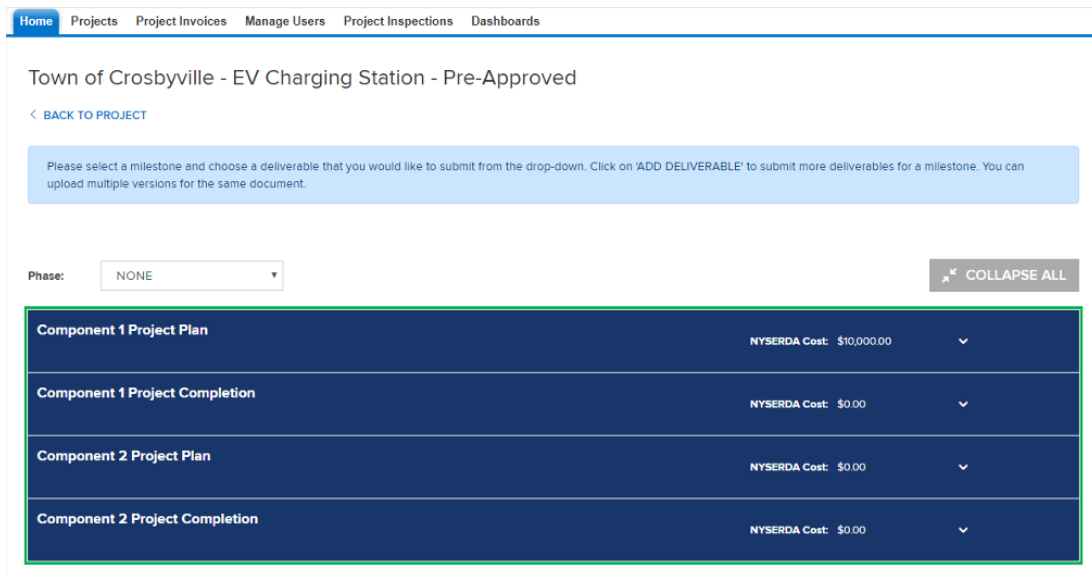
3. Expand a **Task** by clicking on the arrow to the right side of the blue bar containing the name of the **Task**. Expand all **Tasks** by clicking the **Expand All** button.

Phase:	NONE ▾		⤢ EXPAND ALL

Component 1 Project Plan	NYSERDA Cost: $10,000.00	˅
Component 1 Project Completion	NYSERDA Cost: $0.00	˅
Component 2 Project Plan	NYSERDA Cost: $0.00	˅
Component 2 Project Completion	NYSERDA Cost: $0.00	˅

Chatter Feed Messages   Clean energy Communities Home   Submitting Deliverables

Submitting Deliverables

Introduction

Placeholder

Instructions

1. To upload deliverables associated with a **Task**, expand the **Task** view as described in the Milestones and Deliverables page and click on the **Manage Deliverables** button.

2. Click **Choose File**, locate and select the file on your computer.

3. Change the **Drop-Down** to**:**

New	Select when submitting a deliverable for the first time or submitting an additional file.
Version	Select if you are replacing a previously submitted file with an updated one.

4. Click **Upload** button to upload the file. The page will refresh, and the **Status** will change from **Unsubmitted** to **Submitted**. Your Project Manager and the external reviewer will be notified.

5. Once submitted, the Project Manager and External Reviewers will review the deliverable documents. Project Managers and External Reviewers may provide feedback and request revision in the Chatter Feed. If so, they will leave a comment for each deliverable. You can review these comments by clicking the **Eye** icon next to each deliverable in the **Milestone & Deliverables** page.

6. If revisions are required, repeat the instructions for submitting deliverables (steps 1-4 on this page) and re-submit the deliverable as a **Version** to the original deliverable.

7. Once a deliverable is approved, the Project Manager will approve the **Milestone** and you will receive an automated email confirming that you are able to submit an invoice for the approved **Milestone**. Approved **Milestones** can also be viewed on the Milestones and Deliverables page.

Milestones and Deliverables   Clean Energy Communities Home   Invoicing

Invoicing

Introduction

Invoicing is predicated on the approved Milestones. Once your NYSERDA Project Manager has approved a Milestone, you are available to invoice.

1. To generate an invoice, click on the **Details** tab to see your **Project** information, scroll down to the **Project Invoices** section which shows all previously submitted and draft invoices, and click on **New Project Invoice**.

> ✓ Approved **Milestones** and **Deliverables** are systematically pulled into the **New Project Invoice** and no additional documentations is required for upload to the **Invoice**.

2. Enter a Payment Message or Invoice Notes as applicable (though not required).

3. If required as part of your contract, enter a **Cost Share** amount, otherwise, leave the **Cost Share** field blank and click the **Save** button. This will create a **Draft Invoice**.

4. After clicking the **Save** button, a **Submit** button will appear at the bottom of the invoice. To submit the final version of the invoice, click this new **Submit** button. A confirmation message will appear on the top of the page indicating that you invoice was successfully submitted.

Invoice has been submitted successfully.

BILLING ADDRESS	INVOICE SUMMARY		AMOUNT DUE
xyz	NYSERDA Invoice #:	INV-00088812	**$80,000.00**
Jake Pawn	Invoice Date:	10/12/2017	
11 main street	Invoice Status:	Submitted	
Foxboro (MA), Massachusetts 34534	Project Contract:	2231	
	Purchase Order *	43543	
	Final Payment:	☐	

5. Previously submitted or **Draft** invoices can be found on your project's **Details** tab under the **Project Invoices** section.

📑 **Project Invoices**   New Project Invoice

Action	Invoice Number		Total Amount Due	Status	Invoice Date
Edit	INV-00093446		$	Paid	12/26/2017
Edit	INV-00095631		$	Paid	2/8/2018

Submitting Deliverables   Home