Participating Contractors: Appliance Enrollments

Welcome! Here you will find information for Participating Contractors and Vendors to submit and manage EmPower+ Appliance enrollments through the NY Home Energy Portal.

The EmPower+ Appliance enrollment can only be initiated from an EmPower+ Enrollment during either the Workscope Submission or Final Project Submission Steps. Additionally, this enrollment should only be created if the Contractor is proposing to replace an existing refrigerator and /or freezer. When an existing EmPower+ Appliance Enrollment has already been created, the NY HEP will warn the contractor when attempting to create another. In most cases, there should only be one EmPower+ Appliance Enrollment for EmPower+ Enrollments. However, in the case where one of the replacement appliances is backordered, it would be best to initiate a second EmPower+ Appliance enrollment so each replaced appliance can be invoiced separately.

Contractors will be required to upload the **Appliance Exchange Agreement** with the options to also upload photos of the existing appliance(s).

NY HEP Measures List

NY HEP Measure List.pdf

New Appliance Enrollment Training Video

Your browser does not support the HTML5 video element

Information

Applicant Information

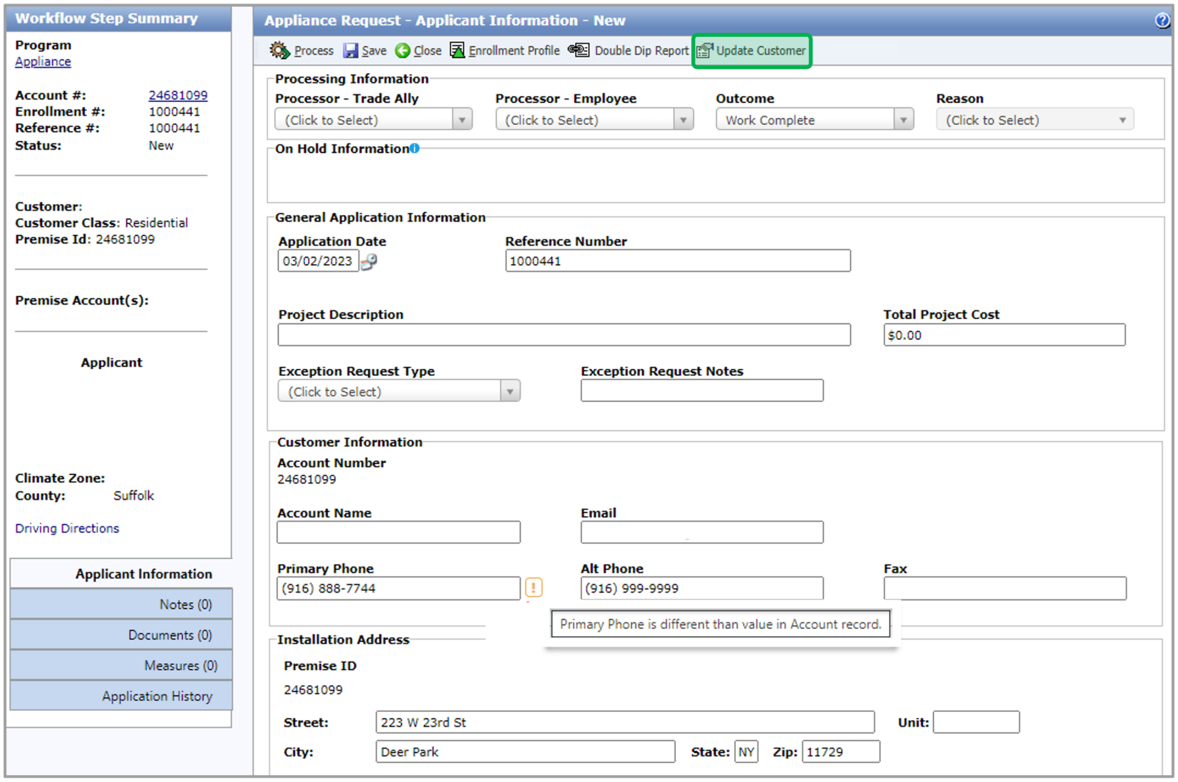
This tab will be prepopulated with the information on the **Customer/Account/Premise**.

If you need to change the **Customer Information**, **Installation Address**, or **Mailing Address**, you can make those changes on the Applicant Information tab, then click **Save**.

The **Number of Full Time Occupants** field on this tab must be completed before the enrollment step can be processes.

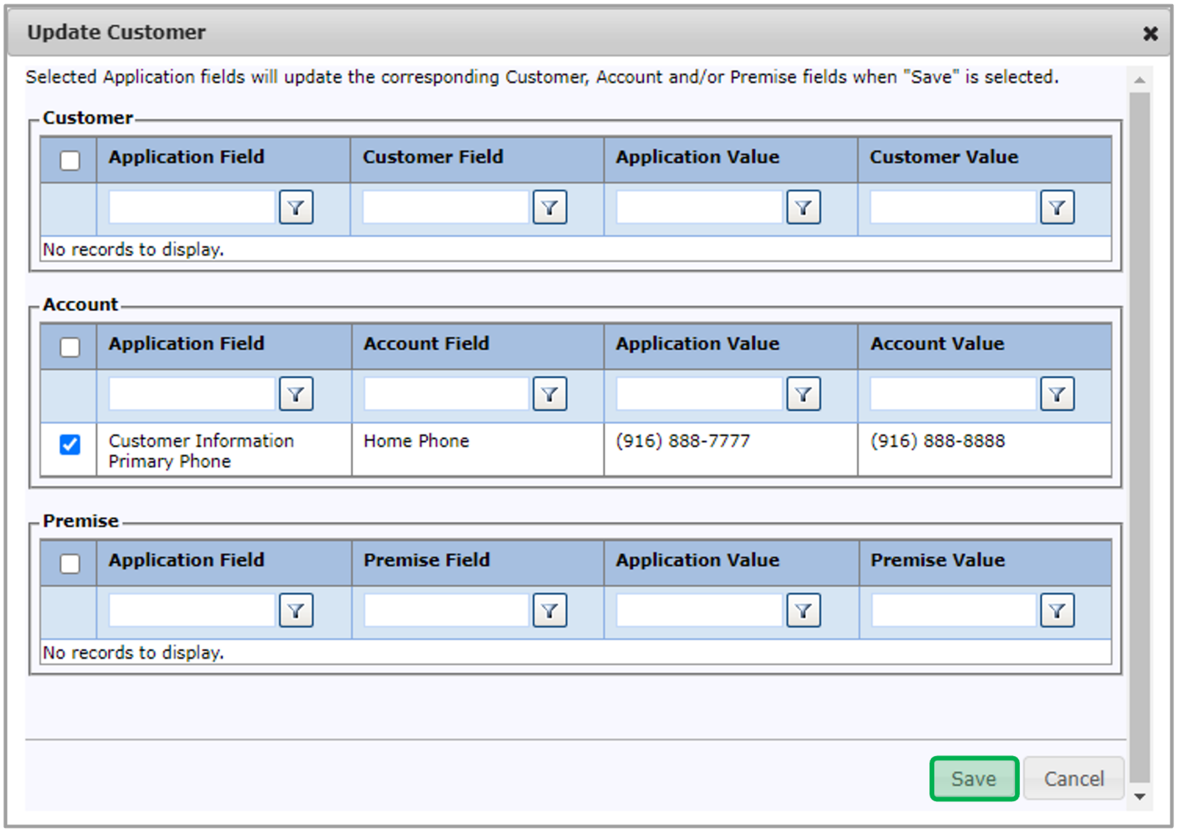
1

If the new value does not match the value that's saved on the **Customer/Account/Premise**, an orange exclamation mark will be displayed next to it. If you hover over the exclamation mark, a tooltip will be displayed indicating that the values are different. You can click the **Update Customer** button to update the value that's saved on the Customer/Account/Premise.



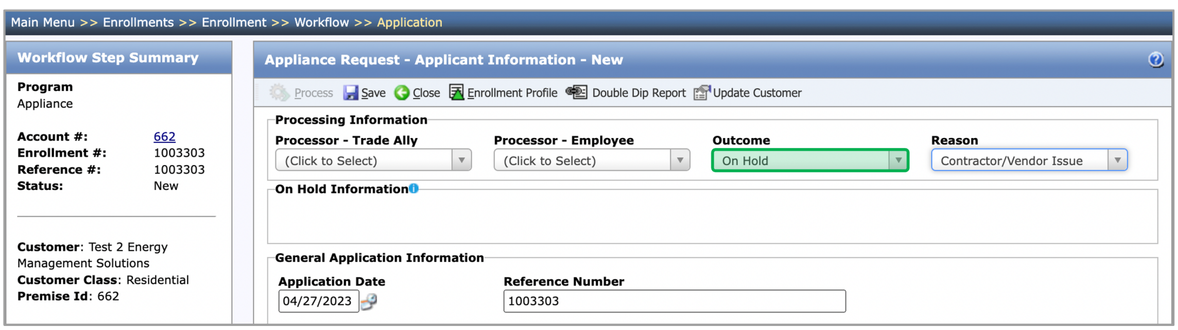
2

When you click the **Update Customer** button, the Update Customer dialog will open, displaying every value on the Appliance Request step that is different than the value saved in the corresponding field on the Customer/Account/Premise. All these fields will be checked by default. When finished updating, click **Save** in the dialog. The system will update the checked Customer/Account /Premise fields for the values to match the Appliance Request step.



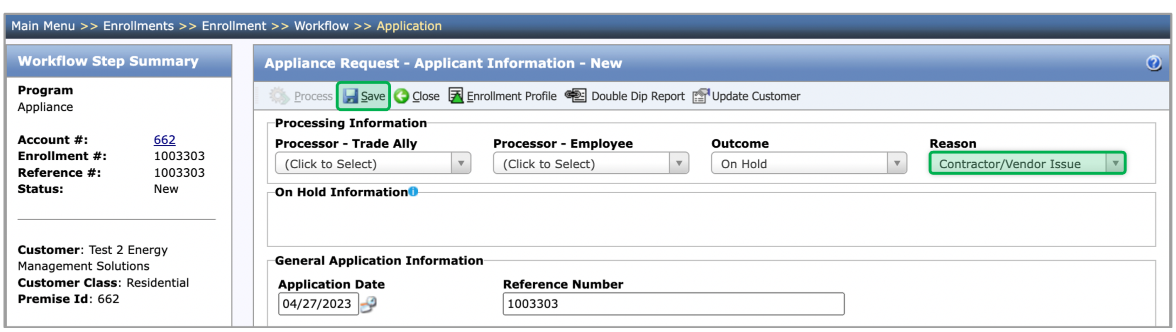
3

The enrollment can be placed on hold by selecting **On Hold** from the **Outcome** drop-down.



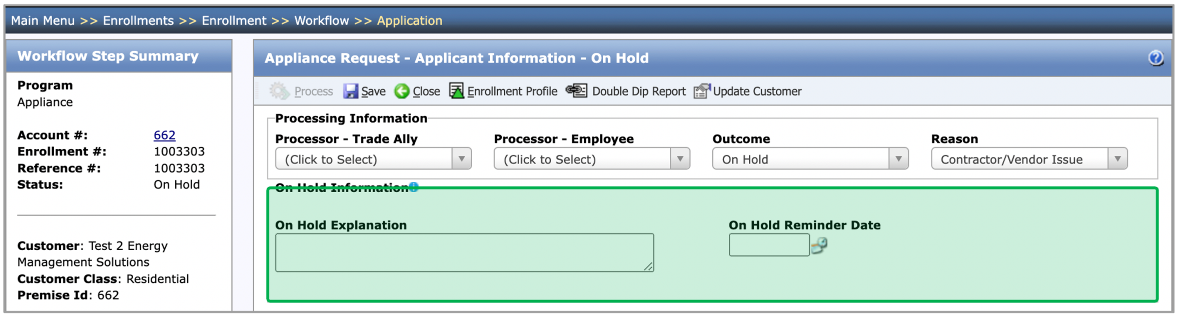
4

If the enrollment is placed on hold, select a reason from the **Reason** drop-down and click **Save**.



5

Two new fields will appear in the On Hold Information section to allow contractors to add details on why they are placing the enrollment on hold and an On Hold Reminder date that will send them a notification once that date arrives.



Notes

Notes

The instruction below provides guidance on how to add notes within an enrollment.

The following Notes will be displayed on the Notes tab:

- The Notes that were added to this workflow step.
- The Notes that were added to a different workflow step on the Appliance enrollment that the user has access to.
- The Notes that were added to a different workflow step on the Appliance enrollment that the user does not have access to as long as the Note's **Who can view this note?** field is set to **Users with access to this enrollment**.

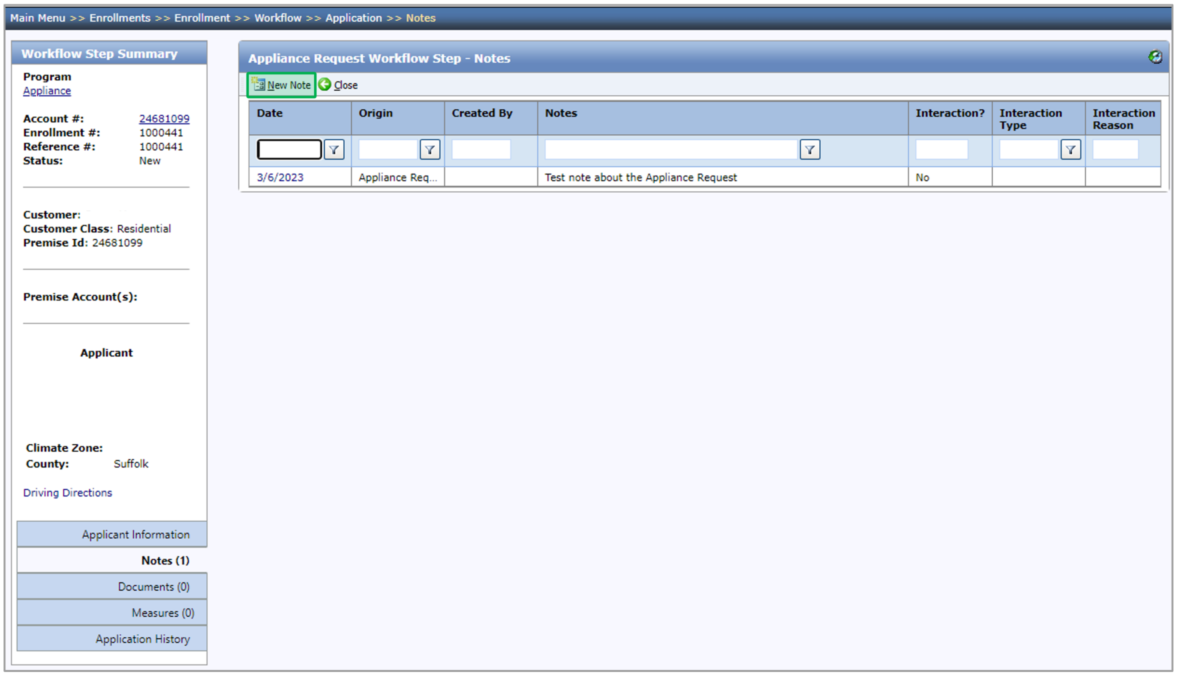
To see these instructions in action, watch the training video below:

Your browser does not support the HTML5 video element

1

To add a new note, access the Note tab and click the **New Note** button. A new Note dialog will open.

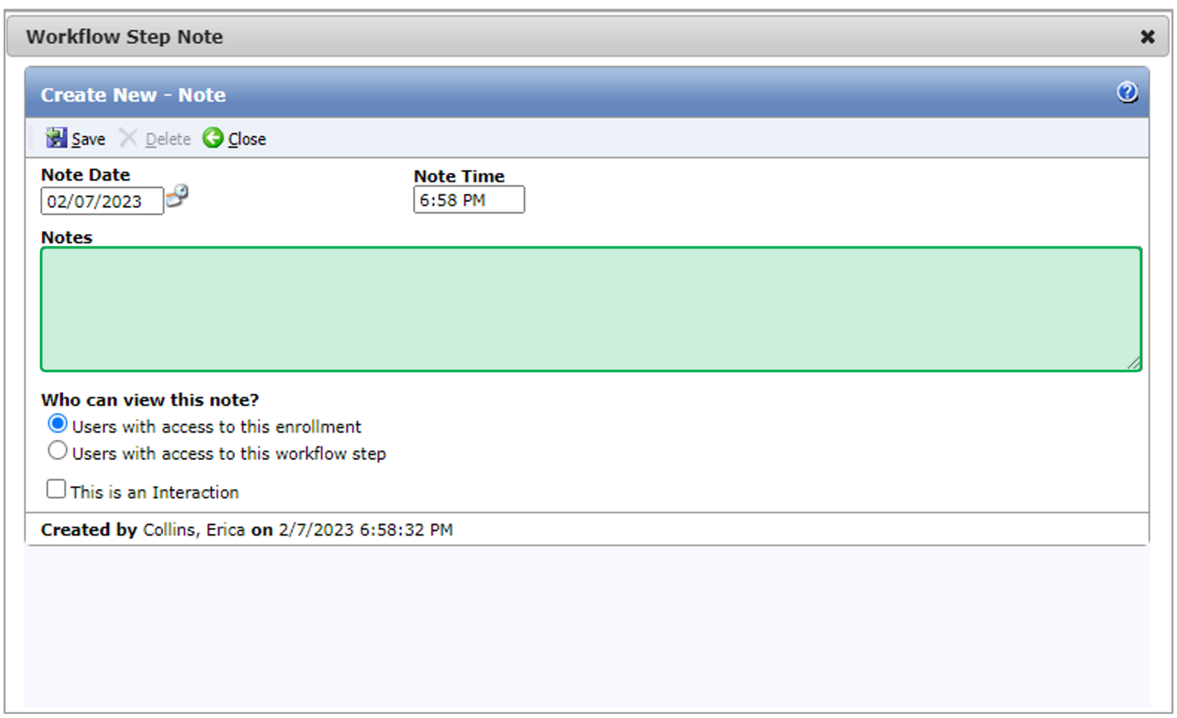
Notes can be added to any Record or Enrollment in the NY HEP where a Note tab is present.



2

Fill in the **Notes** field.

The **Note Date** and **Note Time** fields will automatically populate with the current date and time. Users can change these fields if needed. The system will still document the actual date and time the note was created as well.



3

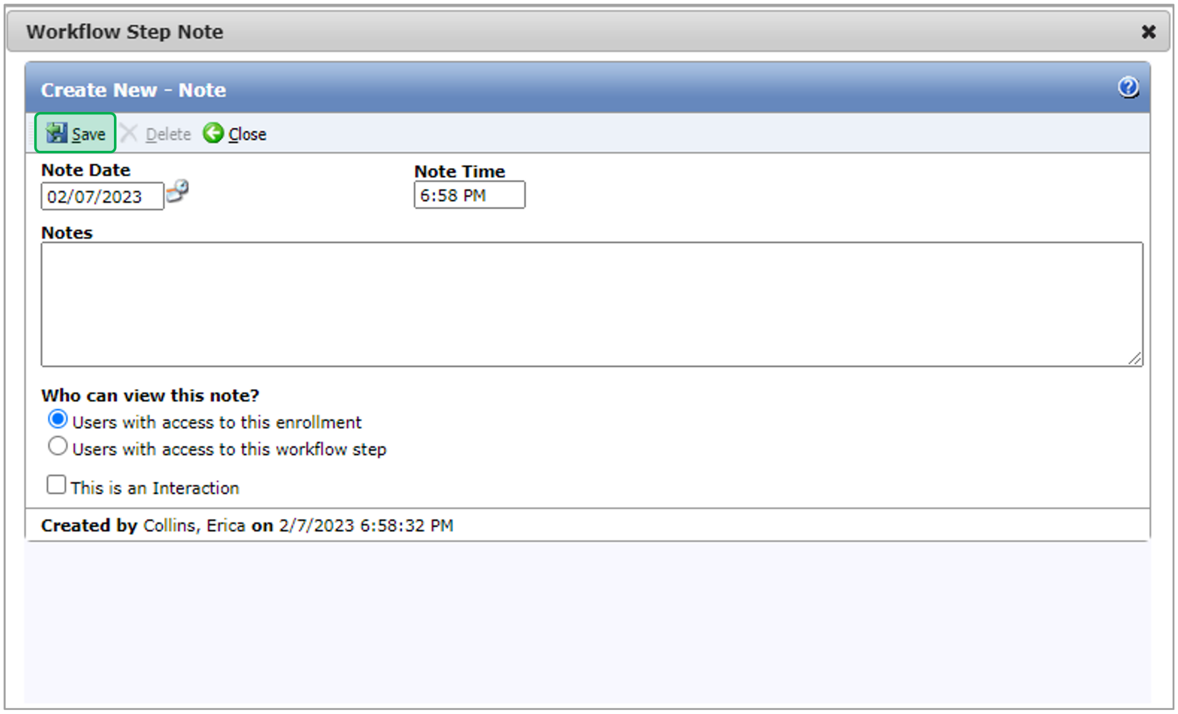
The **Who can view this note?** field will default to **Users with access to this enrollment**.

For Contractors, it does not matter what option is selected for this field as anyone with access to the enrollment will also have access to the workflow step. It is best to leave this field alone.

4

Click **Save** to save the new Note.

Once a note is saved, Contractors cannot edit or delete it. Be sure to review the note carefully before clicking save.



Documents

Workscope Submission - Documents

The instruction below provides guidance on how to upload document(s) within an enrollment. A red exclamation mark will be displayed under the **Required** column indicating the document type being a **Required Document**. When uploading documents, multiple document types can be selected for a single document. This is helpful when a single document can satisfy multiple document requirements.

Multiple documents can be uploaded at the same time:

PC Users: CTRL + Click

Mac Users: Command + Click

To see these instructions in action, please watch the training video below:

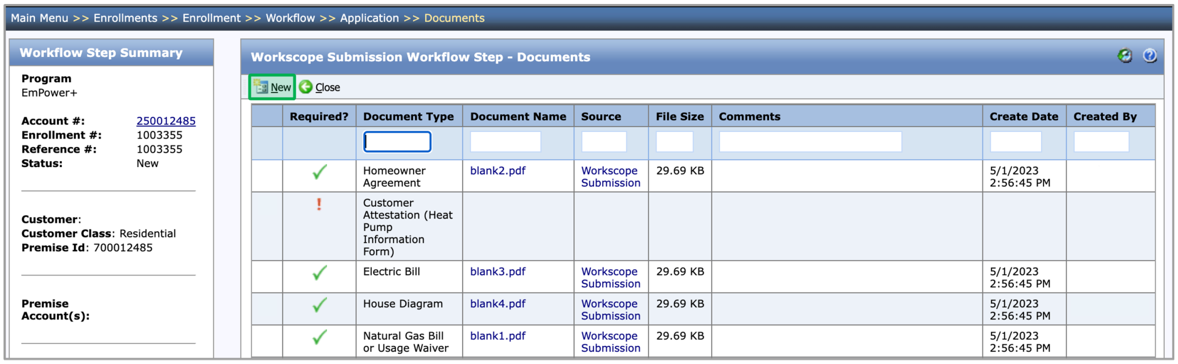
Your browser does not support the HTML5 video element

1

To upload a Document, access the enrollment's **Documents** tab during any step.

2

Click the **New** button for the Document dialog will open.

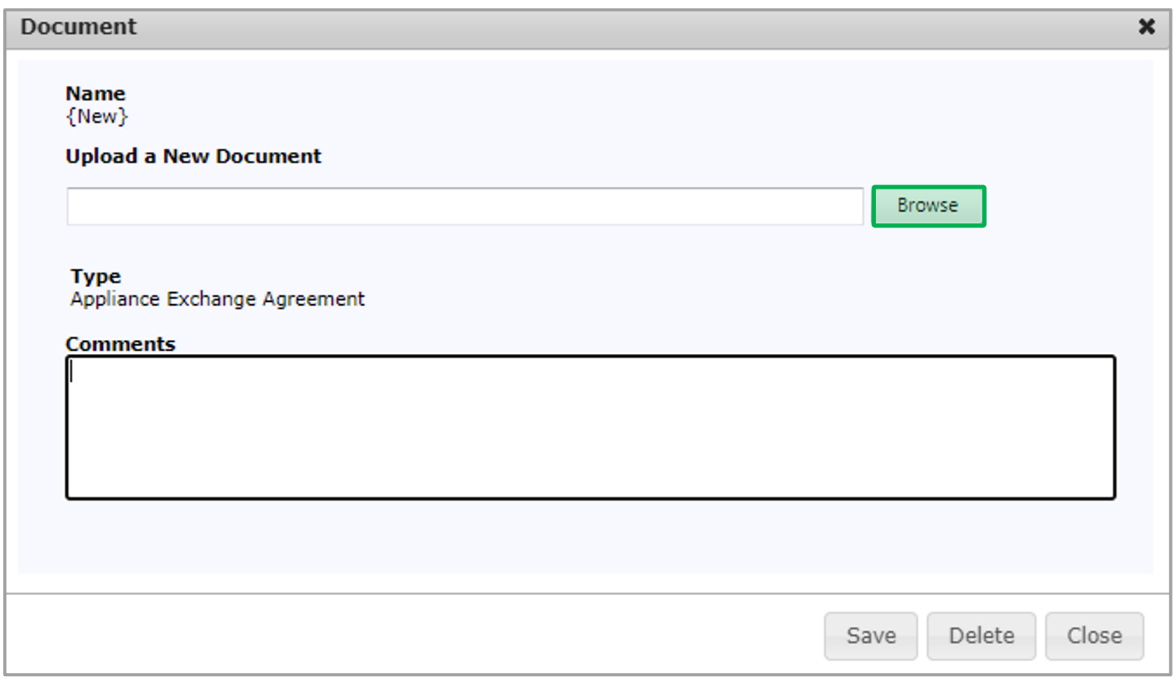


3

Click **Browse** to select a file to upload.

Multiple documents can be uploaded at the same time.

If no Refrigerator/Freezer is planned for a **Tier 1 Enrollment**, the **Appliance Exchange Agreement** (AEA) is a required document on the EmPower + Enrollment.



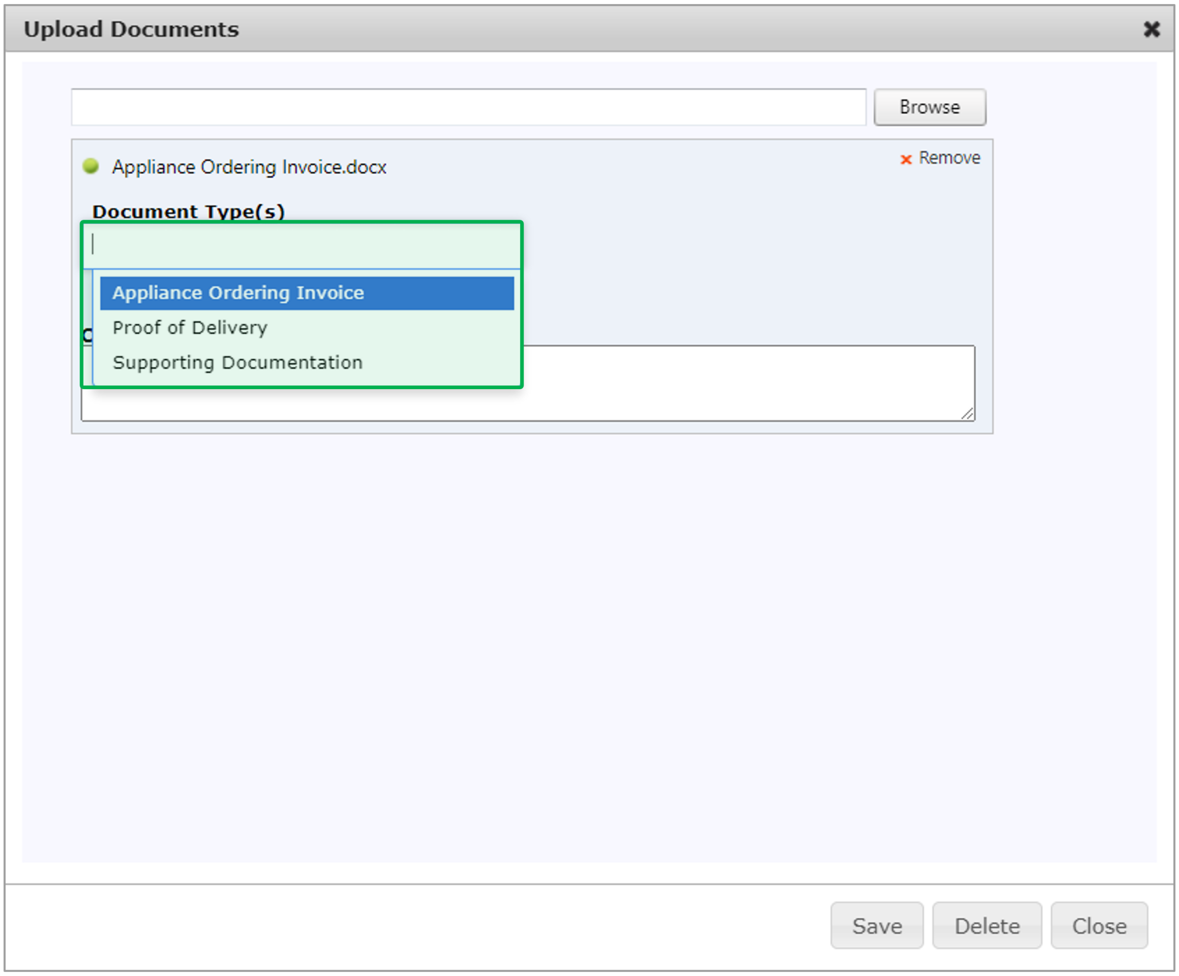
4

After the file is uploaded for the Document Type, click **Save** and then click **Close** to upload the file and close the dialog.

After you've selected a file, you can remove it by clicking the **x** Remove button.

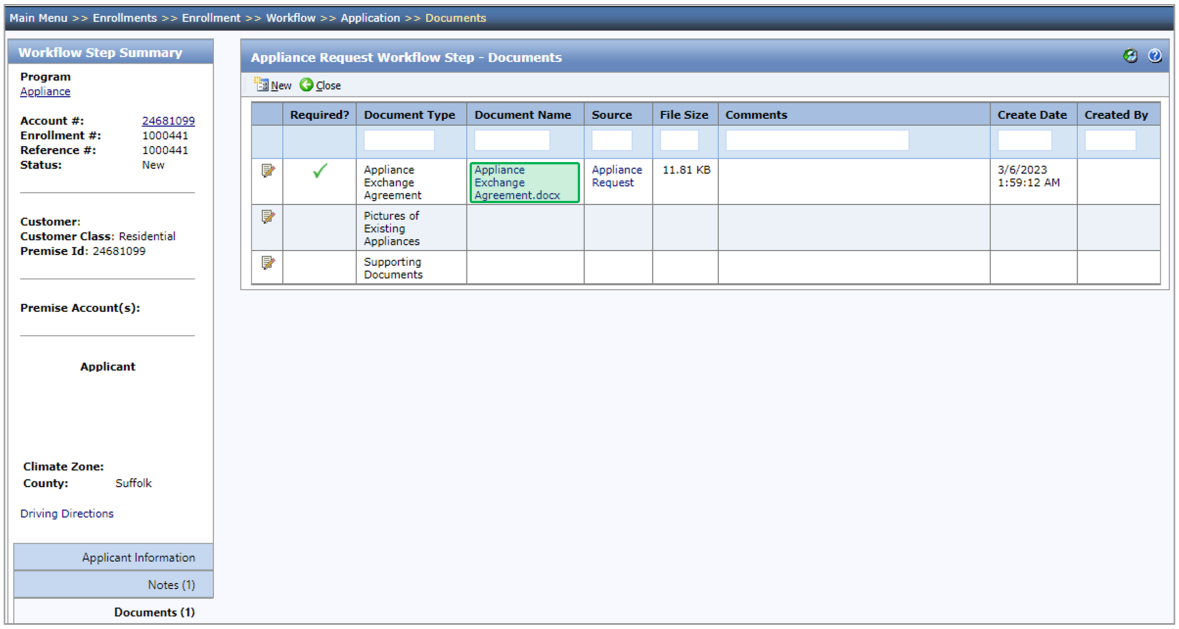
Multiple document types can be selected for a single document during upload. This is helpful when a single document can be used to satisfy multiple document requirements. Once the initial document type is selected, re-click the document type field to add an additional document type.

This is the Contractors last opportunity to click **Remove** to not upload a specific document. Once **Save** is clicked, the document becomes a public record and it cannot be edited, deleted, or otherwise overwritten. If the wrong document is uploaded, Contractors will need to upload the correct document and use the Comments fields to let both **CLEAResult** and **NYS ERDA** know which is the correct document to review.



5

To download and view an uploaded document, click the **Document Name Hyperlink**.



Measures

Measures

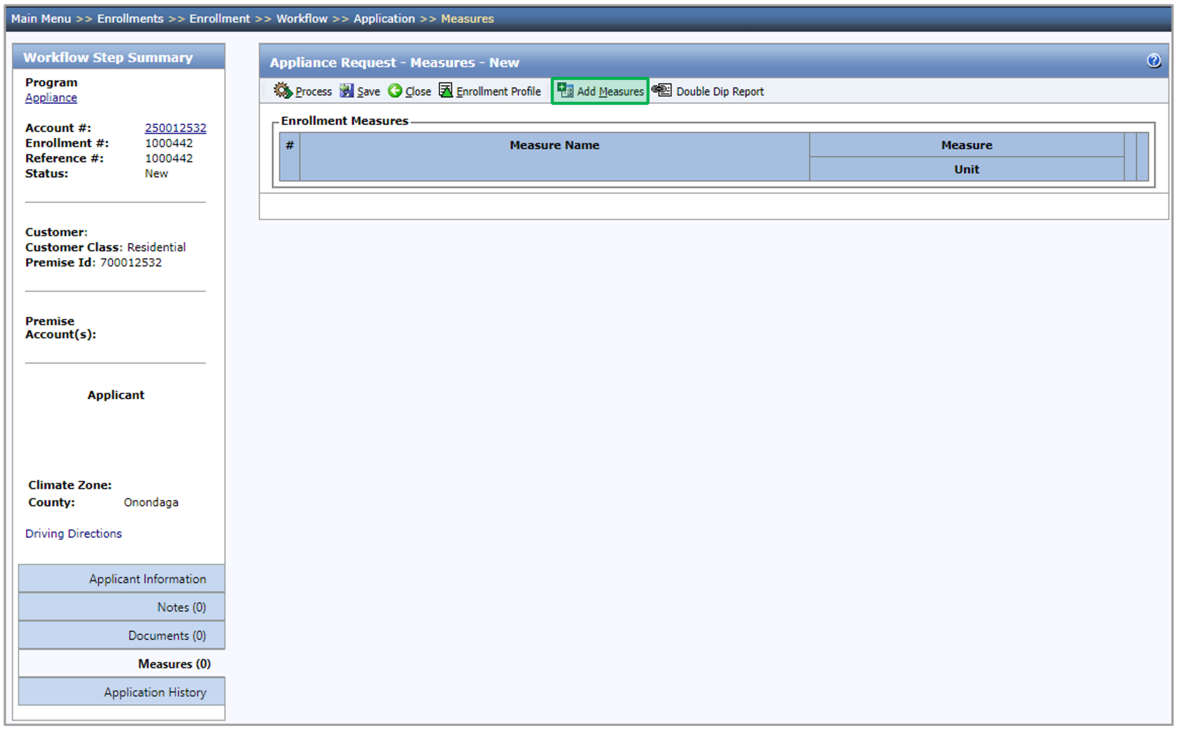
The Measures tab asks you to add measures to the Appliance Request step.

For a full list of al program measures that may help with this tab, please access the NY HEP Measures List.

To see these instructions in action, watch the training video below:

Your browser does not support the HTML5 video element

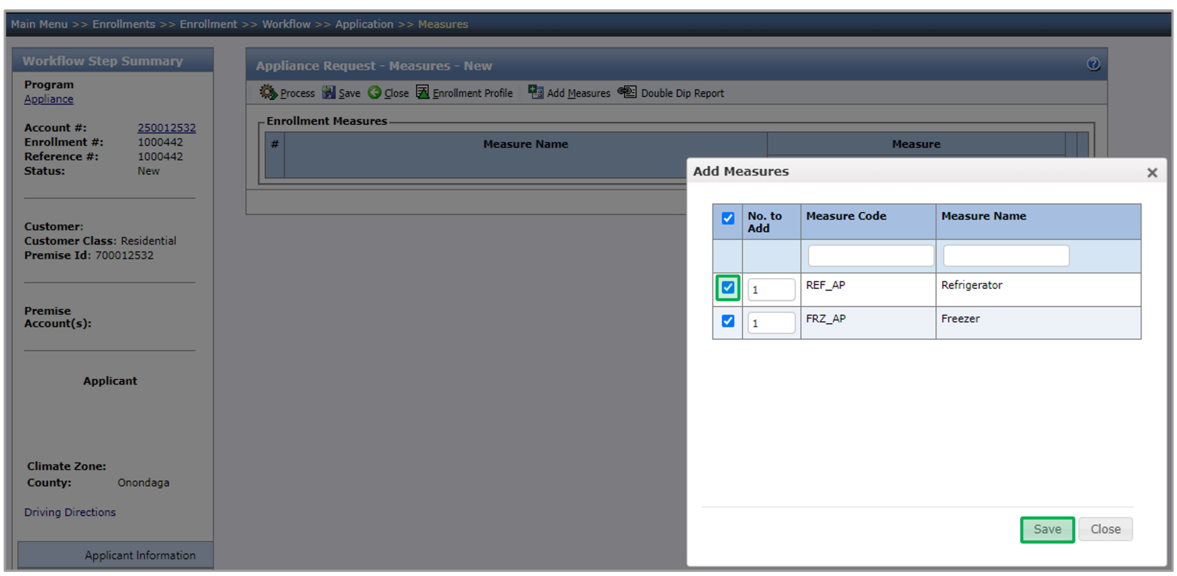
1. Click the **Add Measures** button. The Add Measures dialog will open.



2

To select one or more measures to add to the step, check the box in the left-hand column. To add the selected measures to the step, click the **Save** button in the dialog.

If you increase the **No. to Add** value after selecting the measure, the system will add that many unique instances of the measure to the Appliance Request step.



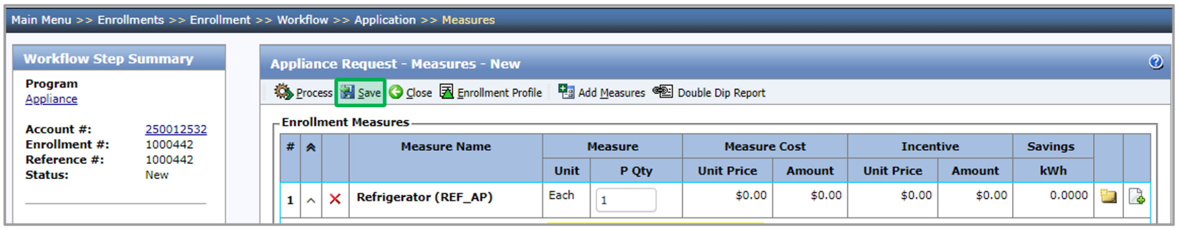
3

Click on any of the added measure to complete required fields (marked with a ** to the left of the field name). Information capture for each measure details the specs of the existing appliance.

Required fields are denoted with ** (asterisk). After all the measures are added and all the data entry fields are filled out, the Appliance Request step can be processed.

4

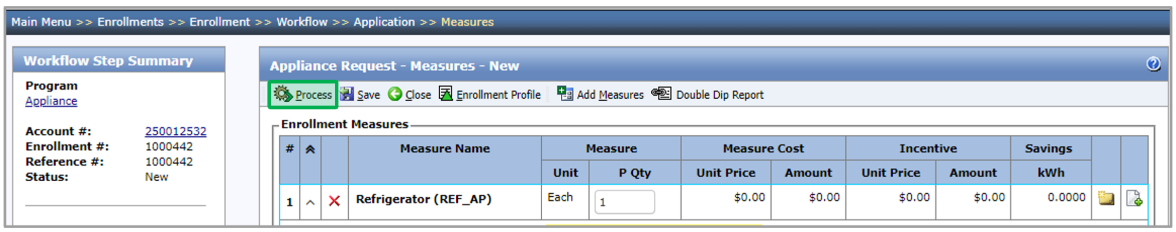
Click the **Save** button before Processing and re-review the **Documents** tab to be sure you have uploaded the correct required documents.



5

After your review, click the **Process** button at the top of the Measures tab or the Applicant Information tab.

If there are any missing fields, a popup will appear notifying you of what is missing. The system will also validate whether a measure's primary **Existing Unit Approximate Model Year** is **2011-present** while the **Exception Request Type** field is blank. If yes, an error will be displayed that prevents the user from being able to process the step.



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