Introduction

The Empower+ Application is intended to streamline the application process while broadening the scope of services approved Applicants are eligible for. The application can be accessed by navigating to nyserda.ny.gov/ahp-empower. Applicants can access and complete the application online (an Application Portal Account is required) or print, sign and mail in a paper application.

Applicants can receive assistance from Participating Contractors and/or Community Organizations when completing an application.

Why Complete an Application Online?

Faster, Safer, and More Accurate:

- Its the fastest path for reviewing and approving an EmPower+ applicant.
- Reduces or prevents incomplete, incorrect or missing information in the application.
- Sensitive documents (proof of income, utility bills) in any format (pdf, photo) are uploaded securely.
- Applicants can provide an e-signature rather than a physical one.
- Approved applications automatically and seamlessly upload into Uplight to auto-create projects.

More Control:

- Applicants can choose their own Contractor if they own the property referenced in the application.
- Applicants can start, stop and return to the application at anytime which is helpful if1:

The application cannot be completed in one setting,

Additional time is needed to gather required and/or supporting documents or information

More Reliable Communications:

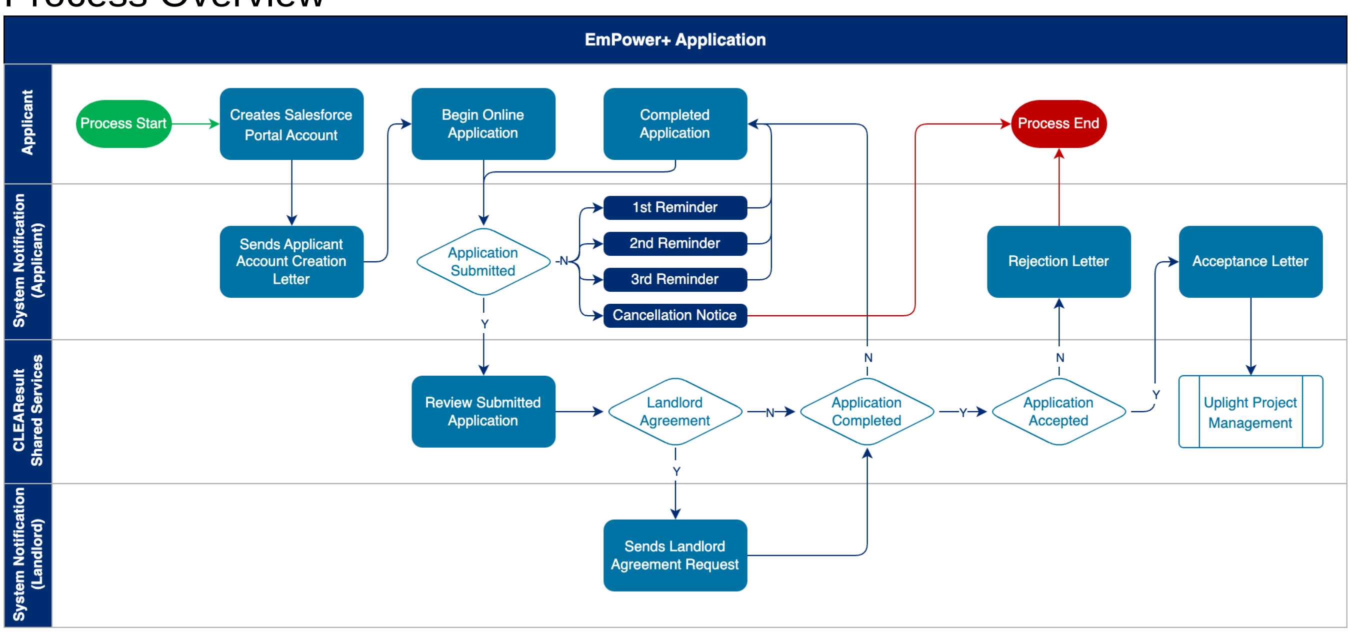
- NYSERDA staff can leverage the online application to quickly reach out to applicants directly for missing documentation or information.
- The system the application is built around provides timely, automated reminders and notifications to applicants when communication is necessary.

Reminders are sent at day 10, 20, and 30 once an application has been initiated.

Manual cancellation of the application occurs at day 30.

The materials below provide additional resource and materials to help CLEAResults Shared Services who are assisting Applicants when completing and submitting an EmPower+ Application. Additionally, applicants can be provided the following link which will allow them to access related material specific to their needs: https://knowledge.nyserda.ny.gov/pages/viewpage.action?pageId=81855384

Process Overview



Resource Materials

Presentation Materials

NYSERDA conducted a training to introduce the new Empower+ Application in July, 2021. The below presentation was used during that training session and can be accessed below for review purposes.

EAE Combined App...CLEAResult).pptx

Training Videos

NYSERDA conducted a training to introduce the new Empower+ in July, 2021. The below recording can be accessed to review that training session.

Your browser does not support the HTML5 video element

Creating Campaign Codes

Campaign Codes

With the EmPower+ Application, CLEAResult Shared Services, Contractors, Participating Utilities, and Community Organizers can create Campaign Codes from their Salesforce Application Portal. Once a campaign code is created, a web link will be generated that can be posted to a website or shared with an applicant through email.

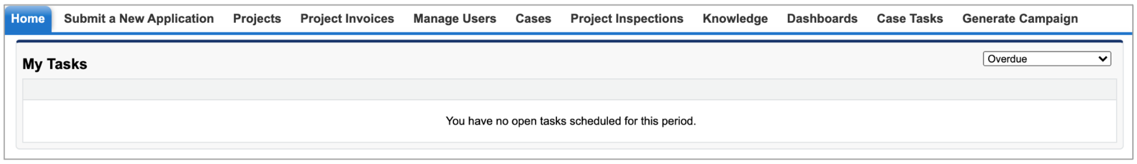
- Campaign codes generated by Contractors or Community Organizers will prepopulate the associated fields on the Partner Information page of the online EmPower+ Application when the customer initiates an application through the associated web link.
- All applications initiated by the customer through a campaign code generated web link, will be associated with that campaign code and trackable via a linked report.
- All entities with access to generate a campaign code can set up multiple campaign codes to track different marketing outreach efforts through Salesforce.

1

To create a **Campaign Code**, log into Salesforce.

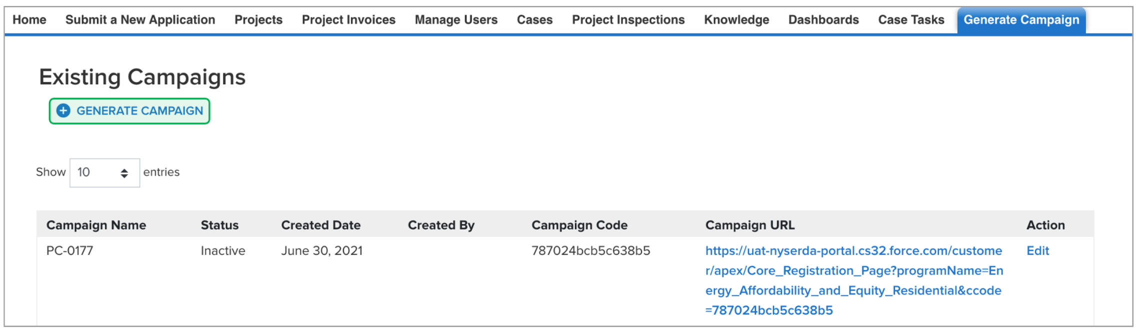
2

Access the **Generate Campaign** tab.



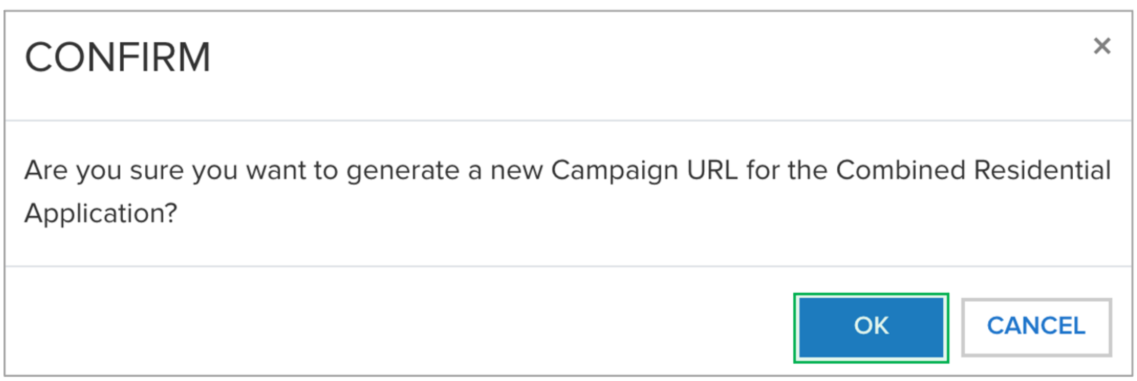
3

On the **Generate Campaign** tab, a list of all campaigns created by the logged in user are displayed. To create a new **Campaign**, click **Generate Campaign**.



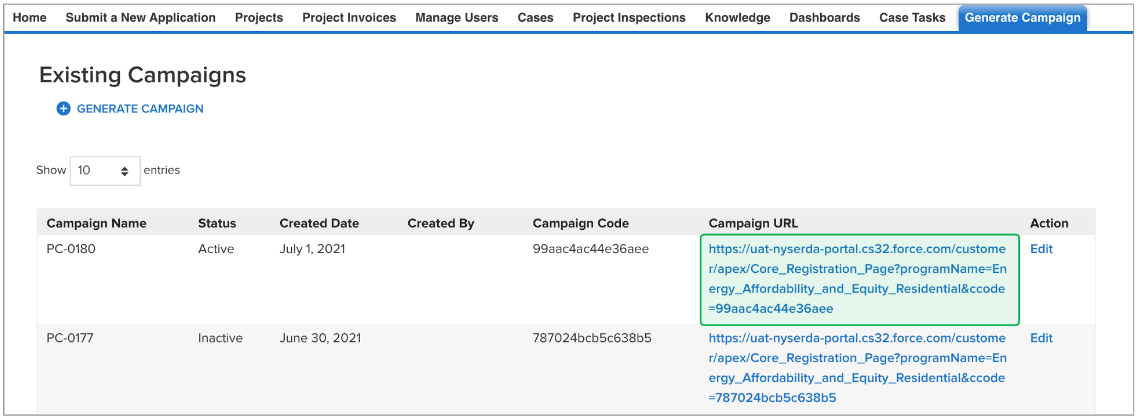
4

A modal window will open. Click **OK** to confirm the request to generate a new Campaign Code (and URL).



5

Back on the **Generate Campaign** tab, the newly generated **Campaign Code** will appear on the top of the list. Be sure to check that the **Campaign Code** status is set to **Active**. The Campaign URL can be copied and pasted for use in websites or shared through email.

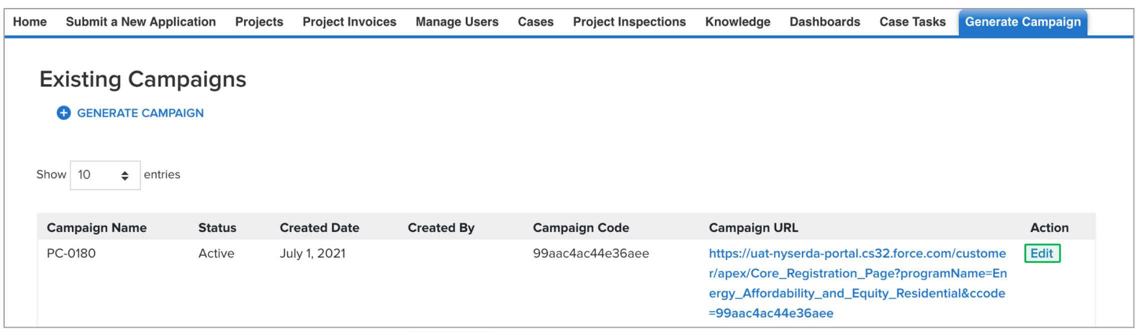


6

Campaign Codes that will no longer be utilized should be switch to **Inactive** status.

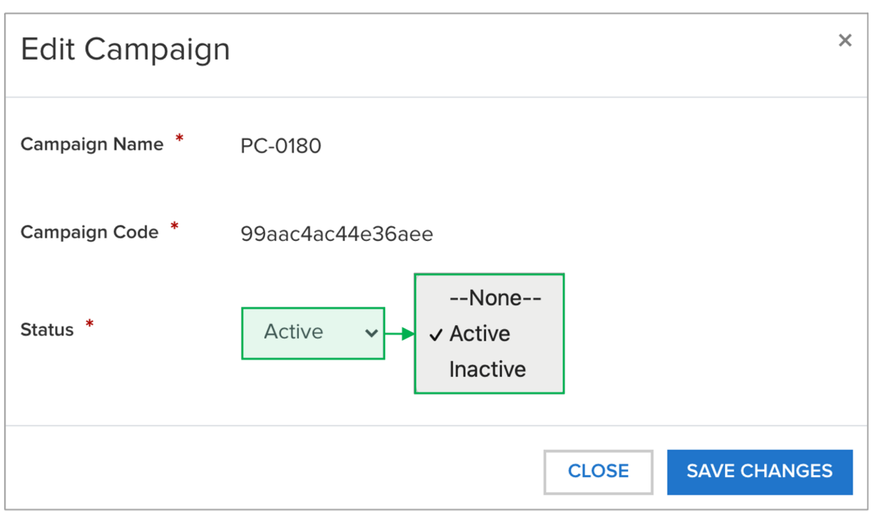
7

Click the **Edit** link to the far right of the **Campaign Code**.



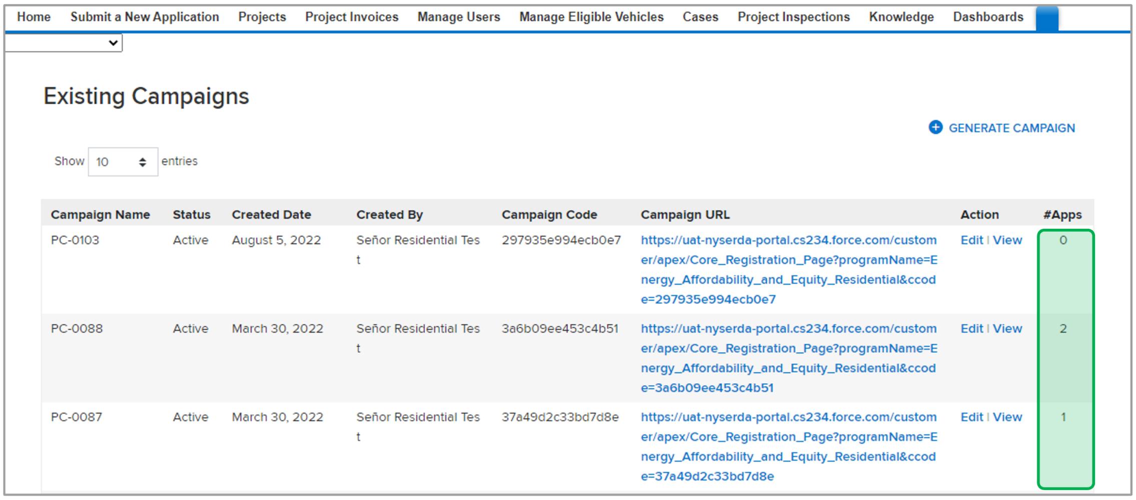
8

On the modal window that opens, click the **Status** drop-down and change the selection from **Active** to **Inactive**. Then click **Save Changes**.



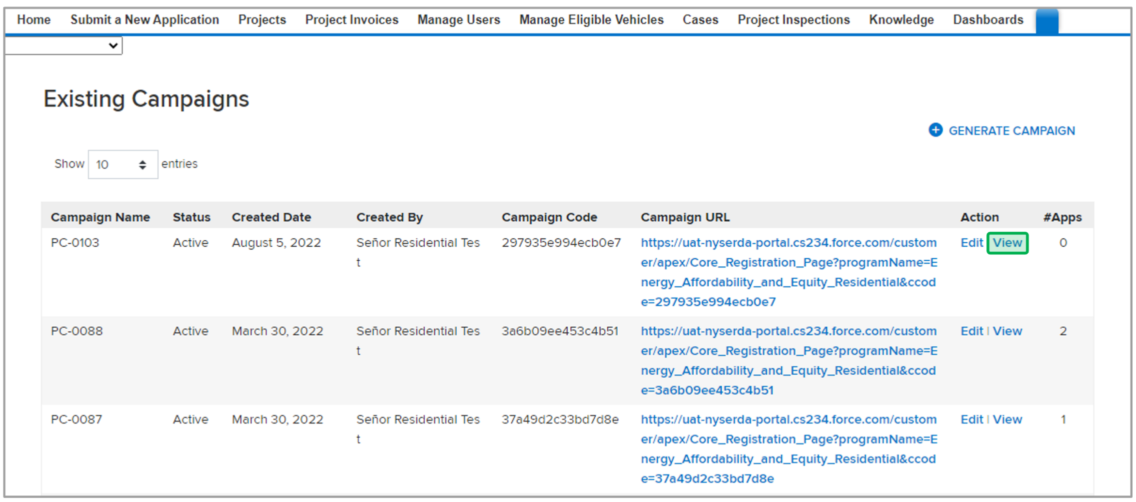
9

The number of applications that have been received for each campaign code can be viewed on the **Generate Campaign Code** tab.



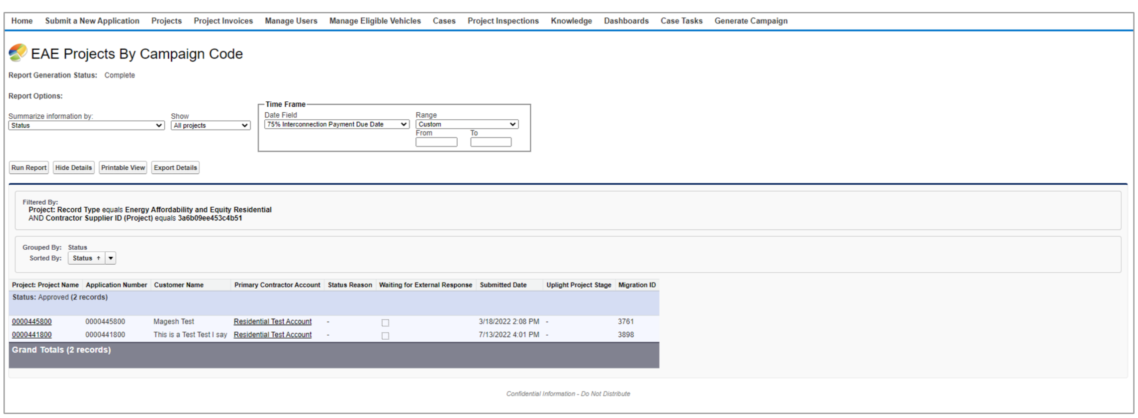
10

To view the applications associated with the campaign code, click on the **View** hyperlink in the **Action** column.



11

The page will then redirect to the campaign code **Record**.



Salesforce Application Portal

Applicants are required to create a Salesforce Application Portal account to use the Online Application. A Salesforce Application Portal account provides multiple methods of communication through the use of Notes and Attachments that allows Applicants to:

- Communicate with the NYSERDA program (even after application submission).
- Update information or documents in their application.

ⓘ The instructional materials below are intended to provide guidance for:

- Applicants when creating a Salesforce Application Portal, or
- CLEAResult Shared Services, Community Organizations, NYSERDA Energy Advisors, Participating Contractors, and Participating Utilities when assisting Applicants through the online application process.

1

Access the Portal Registration website for the Energy Affordability & Equity Residential program.

Salesforce Customer Registration

2

On the Portal Registration page, review the introductory text to familiarize yourself with the registration requirements.

Let's get started with creating your account:

First, please enter your first and last name and provide a valid email address

Once you click submit, an email will be sent to the address provided.

Second, follow the instructions in the email to create a password and take the next steps to complete the application.

Need help? - call 877-697-6278, email us at: info.residential@nyserda.ny.gov

Why do I need to create an account?

Clicking "apply now" allows you to set up an account. Setting up an account is the quickest way to apply for services. Once your account is set up, you can save your in-progress application, submit your application and supporting documents for review, and check on your application status. If you would rather print and mail in a paper application, you may print one here: link

3

On the same page, complete all three fields in the **Contact Information** section. This includes **First Name**, **Last Name**, and **E mail Address**. All fields are required.

Contact Information

First Name *

Last Name *

Email *

4

Click **Create**.

CREATE

5

The page will reload with instructions that outline next steps. Salesforce generates an email to the email address provided in Step 3 above to continue the Salesforce Portal account creation process.

Thank you for creating an account to complete your application. An email has been sent to the email address provided. To continue the application process, please follow the directions in the email.

If an email is not received, check your spam folder to make sure the message was not flagged by your email provider. If you still can't find the email, please reach out to us by calling 877-697-6278 or emailing info.residential@nyserda.ny.gov

6

Access the email account entered into Step 3 above and locate the email sent by Salesforce. This email contains a link to continue with your Salesforce Portal account creation as well as your **Username** (the email address entered in Step 3 above with **.nyserda** appended to the end).

NYSERDA Residential Application

Inbox ×

NYSERDA Customer Portal

to me

11:06 AM (12 minutes ago)

Dear FirstName LastName,

Re: Creating an Account

Thank you for creating an account to complete the Combined Residential Application to apply for a no-cost energy audit and available NYSERDA incentives to make your home more comfortable and energy efficient.

To get started, please go to link and create your password and continue with application information.

Username: [email address].nyserda

If you have any questions please feel free to call us at 877-697-6278 or email us at info.residential@nyserda.ny.gov. This email is for the submission of questions only, do not submit documents to this email.

Thank you,
The NYSERDA Energy Affordability and Equity Team

This electronic message may contain privileged or confidential information. If you are not the intended recipient of this e-mail, please delete it from your system and contact us at info.residential@nyserda.ny.gov.

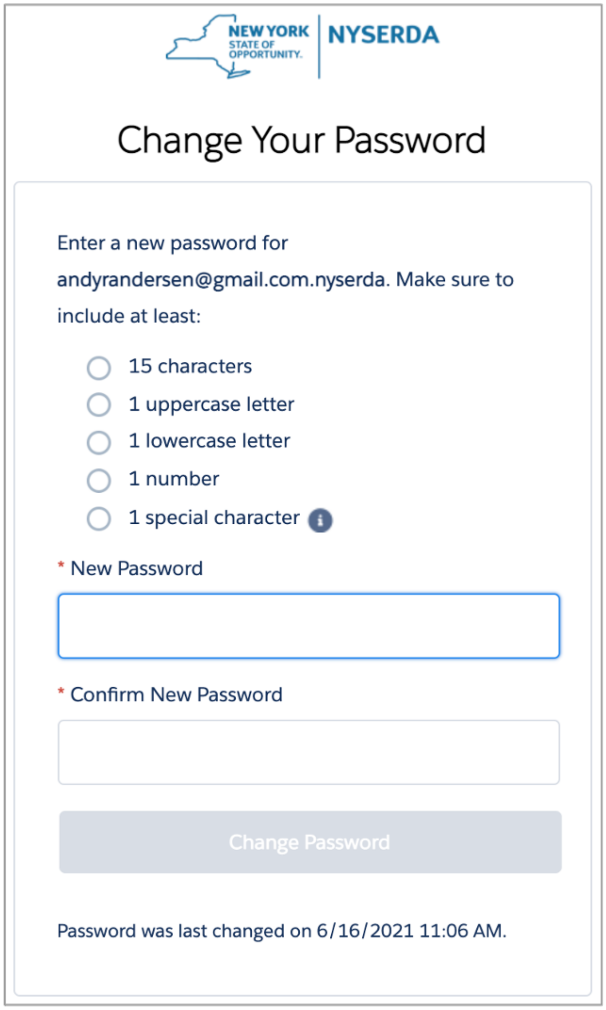
Reply Forward

7

Click the link within the email.

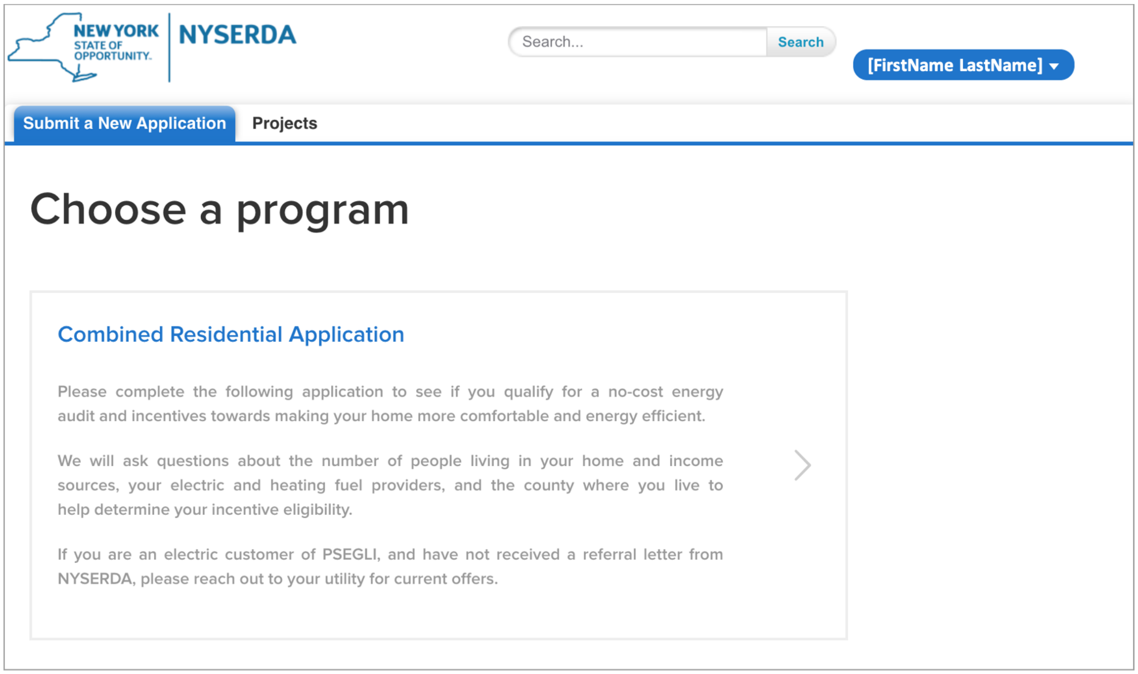
8

On the page you are directed to, create, and confirm, a password for your Salesforce Portal account, being sure to consider the password rules listed on the page. Then, click **Change Password**.



9

Once you click **Change Password**, you will be directed to your new Salesforce Portal account.



Submitting an Online Application

EmPower+ Application

The EmPower+ Application allows applicants to access and submit either online or paper applications to the program. Applicants can receive assistance from Community Organizations and /or Participant Contractors when submitting an application. Applicants who would like to submit an Online Application must create an Application Portal account first. The instructions below guide you on how to access, complete and submit a EmPower+ Application. To access instructions specific to each step below, click the **learn more...** link to expand the section and review the related materials.

The instructional materials below are intended to guide:

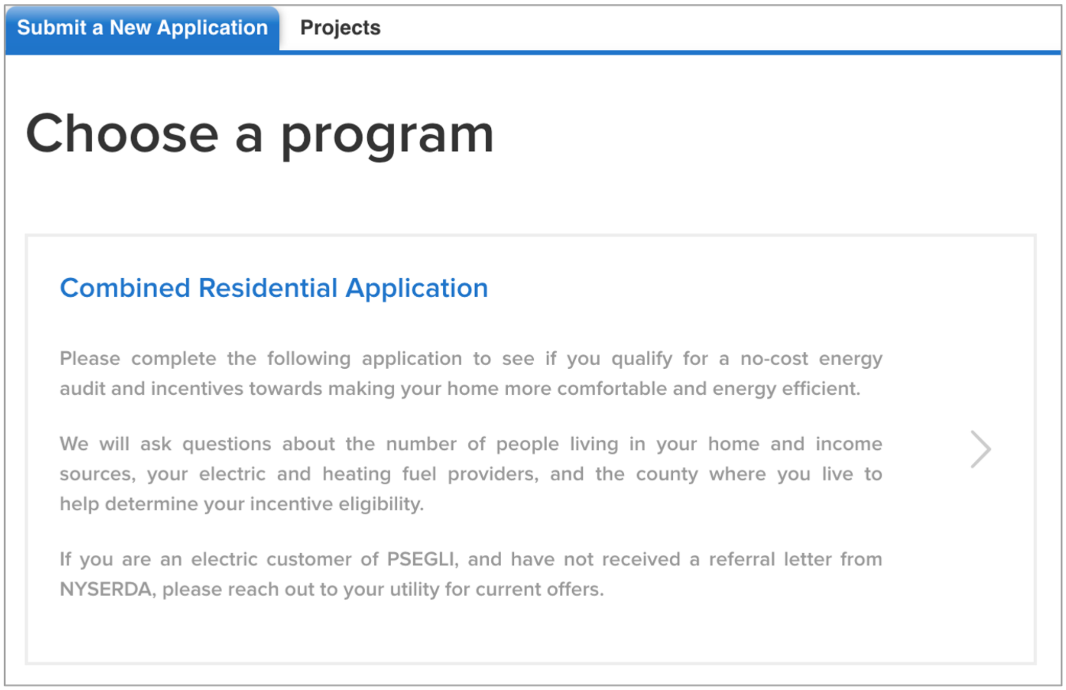
- Applicants when submitting an online application, or
- CLEAResult Shared Services, Community Organizations, NYSERDA Energy Advisors, Participating Contractors, and Participating Utilities when assisting applicants through the online application process.

General Information

1

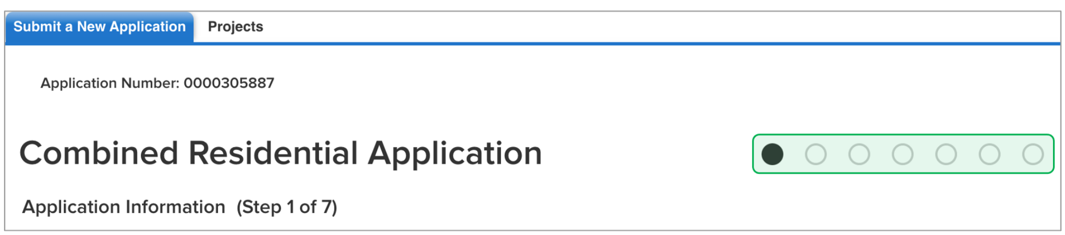
Applicants can access the online application by clicking the link below and logging into your Salesforce Portal account, then by selecting the **EmPower+ Application** op tion.

Salesforce Customer Login



2

The application is comprised of seven (7) distinct steps, or pages, that you will navigate as you complete the application. Each page contains required fields and information denoted by a red asterisk.

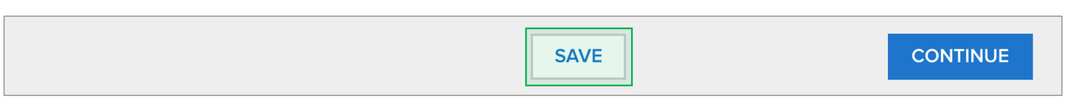


3

Each step, or page, throughout the application contains instructional text at the top of the page. It is highly recommended that you review these instructional texts as they provide clarity regarding the information requested.

4

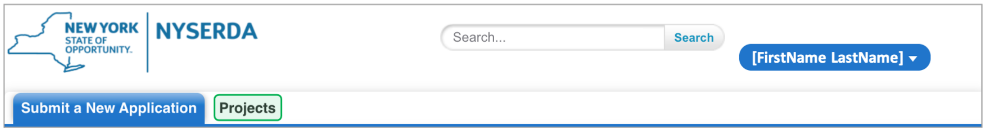
Every step, or page, throughout the application contains a **Save** button at the bottom of the page. Click **Save** before exiting the application if you do not have time to complete it in one sitting.



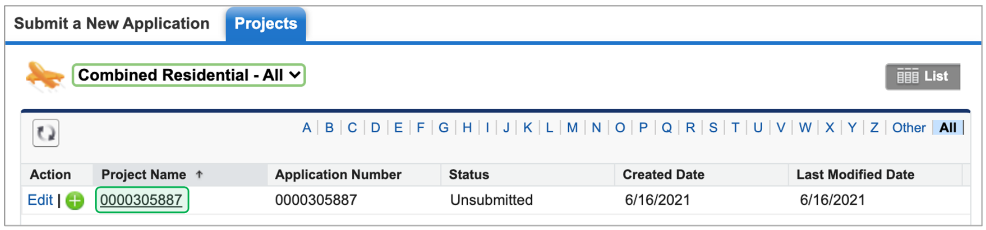
5

To access a **Saved** and incomplete application:

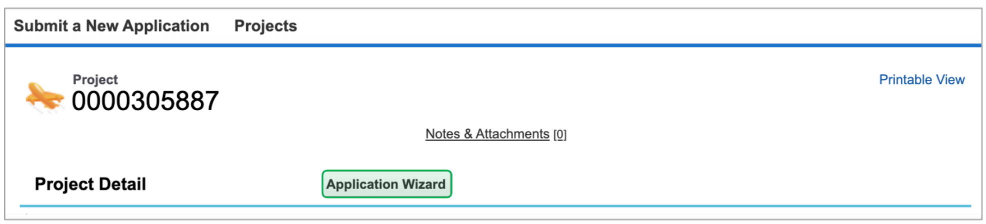
1. Log back into the Salesforce Portal
2. Select the **Enrollment** tab



3. Locate the correct application and click the link in the Enrollment Name column



4. Finally, click the Application Wizard button to return to your incomplete application.



STEP 1: Applicant Information

Complete the Application Information section:

1

Your **First Name** and **Last Name** will pre-populate.

2

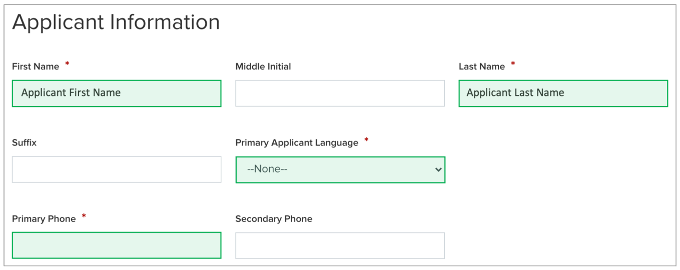
Select your **Preferred Applicant Language** from the drop-down.

3

Provide your **Primary Phone Number**.

4

All other fields are optional and can be completed as needed.



Complete the Site Information section:

1

Using the **Address** field, begin typing in your street address. Salesforce will suggest verified addresses below this field as you type. Selecting an option from this list will populate all other address fields on the page.

Applicants should be aware that, depending on the internet browser used to complete the Online Application, the address fields may pre-populate based on your Browser's auto-form filling functionality, such as with Google Chrome. Applicants should review the address fields if they pre-populate and update with the correct address if necessary.

2

If your **Mailing** address is different from your **Address**, update the **Mailing Address** fields as needed.

3

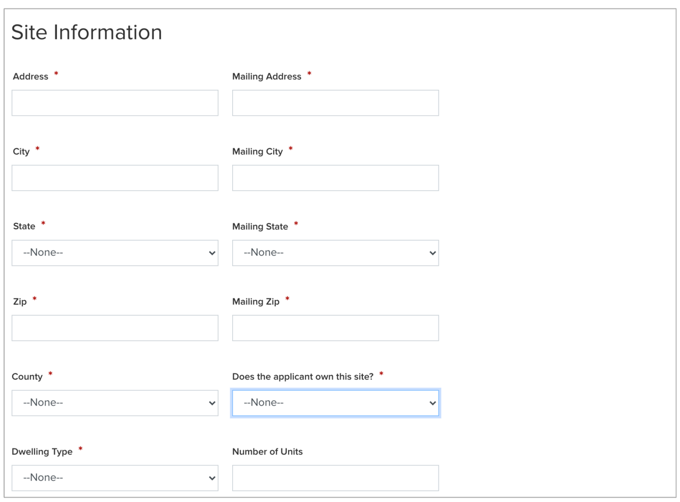
Select the appropriate response for the **Does the applicant own this site** drop down. This field identifies if the applicant is the owner of the dwelling associated with the address entered into the application.

4

Select the option from the **Dwelling Type** drop-down that most closely identifies what type of dwelling exists on the site.

5

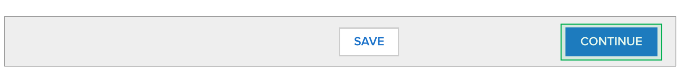
The **Number of Units** field becomes required if you select **Multi-Family (5+ units)** as the **Dwelling Type**.



Save & Continue:

1

To advance to the next step, click **Continue** at the bottom of the page. It is recommended that you click **Save** before clicking **Continue**.



STEP 2: Utility Information

Complete the Utility Information section:

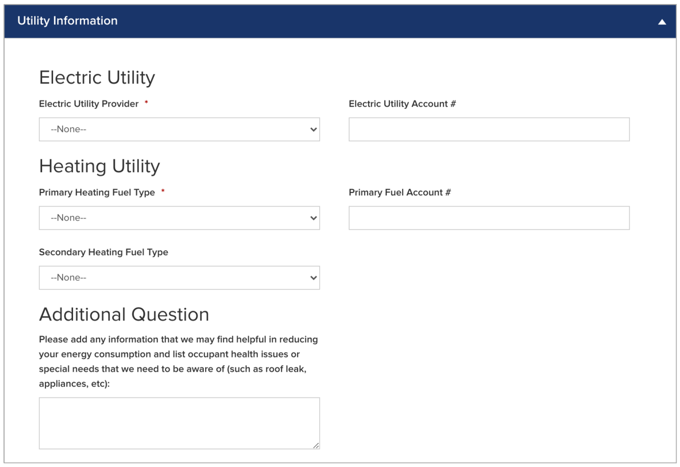
1. Select the **Electric Utility Provider** and the **Primary Heating Fuel Type** for the site.

2. Selecting either **Natural Gas** or **Other** from the **Primary Heating Fuel Type** drop-down will enable an additional required field for this section that must be completed.

3. Include Electric Utility and Primary Fuel Account Numbers. These fields are optional. However, providing NYSERDA with this information will enable us to provide the most accurate and effective recommendations for work that will be performed at the site.

4. If the site has a **Secondary Heating Fuel Type**, select it from the drop-down. This field is optional.

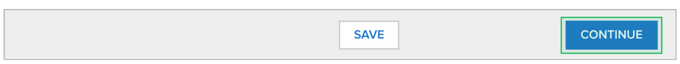
5. Respond to the **Additional Question**, if applicable or appropriate, with any additional information that will help NYSERDA reduce your energy consumption or reduce risks to occupant health or special needs.



Save & Continue:

1

To advance to the next step, click **Continue** at the bottom of the page. It is recommended that you click **Save** before clicking **Continue**.



STEP 3: Partner Information

Complete the Partner Information section:

1

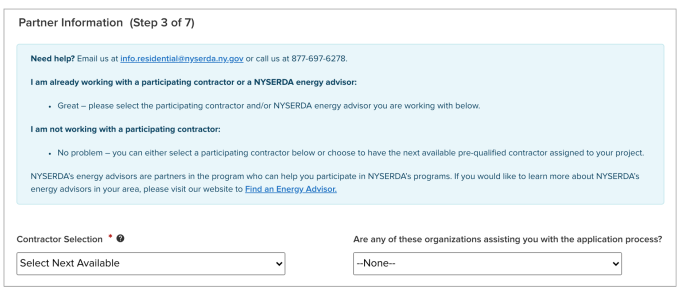
Select a contractor from the **Contractor Selection** drop-down.

- When selecting a contractor, you can either,
    - Select one that you have been working with,
    - Select the **Select Next Available** option to have the next available contractor assigned to your project, or
    - Select your preference for a contractor partner from the list.
- Only those contractors that serve your designated area will appear on the list.
    - If you do not see a contractor, it is likely because they do not serve your area.
- If a selected contractor cannot perform the work due to scheduling restrictions, they may not accept the project.

- If so, an alternate will be selected by CLEAResult Shared Services.
- CLEAResult Shared Services selects contractors when they receive **Paper Applications** or if the Applicant did not select one when applying online.
- When applicants apply using a Campaign Code, the contractor will be selected automatically.
  - Applicants can change the pre-selected contractor at need.

2

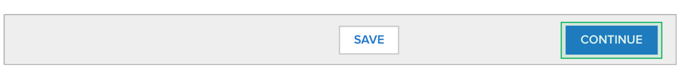
While not required, you can help NYSERDA understand if an independent organization has been assisting you with the application process. If that organization appears on the **Ar e any of these organizations assisting you with the application process?** drop-down, select it from the list.



Save & Continue:

1

To advance to the next step, click **Continue** at the bottom of the page. It is recommended that you click **S ave** before clicking **Continue**.



STEP 4: Eligibility Screening

Household Information & Demographics

1

Add Household Members. The Number of Household Members field will automatically generate.

2

Complete Household Demographics details fields, selecting all options that apply for all members of the household.

Complete the Referral Code Screening:

1

If you received a letter from NYSERDA with a **Referral Code**, select **Yes** in response to the question, enter the **Referral Code** in the provided field, then skip to **Complete the Household Demographics Section** below. No additional eligibility questions are required.

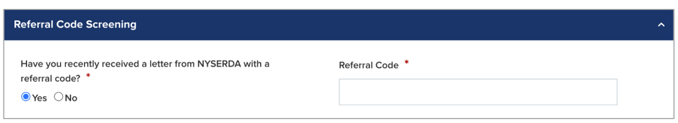
- The Referral Code field is only accessible if **Yes** is selected. If you have a Referral Code, enter it in the field that appears.
- Referral Codes are provided to applicants through mailed letters

or emails either from the Applicant's Utility, from NYSERDA directly, or from the Office of Temporary Disability Assistance (OTDA).

- Applicants who have a referral code and enter it in the application will not need to provide additional income verification as part of the application process.
- Contractors and/or Community Organizations assisting Applicants with the application process should inquire if the Applicant, or their household, received a Referral Code through email or mail.

2

However, if you did not receive a letter with a **Referral Code**, select **No**. An additional section will appear on the application titled **Categ orical Screening**. Review instructions for that section below.



Complete the Categorical Screening:

> This section of the application will only appear if the applicant answers **No** to the question in the **Referral Code Screening** section.

1

If you or any household member received an award letter for HEAP, SNAP (food benefits), SSI, TANF, or Public Assistance in the past 12 months, select **Yes**. Categorical eligibility is based on the date within the award letter. Award letters are good for one year from the date provided.

- Multiple options can be selected.
- An award letter, for each option selected, must be submitted as part of this application.

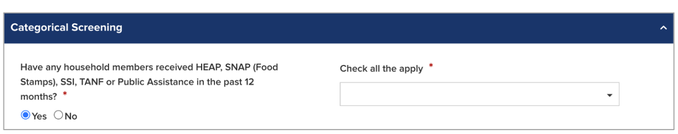
Categorical Eligibility Type	Acceptable Documentation	Acceptable Date Range
HEAP	○ Award Letter ○ OTDA provided HEAP list	Awarded within last 12 months
SNAP	○ Award Letter	Awarded within last 12 months
TANF	○ Award Letter	Awarded within last 12 months
Supplemental Security Income (SSI)	○ Award Letter ○ Benefit Statement	Awarded within last 12 months

- For applicants completing the application online, the award letter can be uploaded during **Step 6: Project Documents**.
- For Paper Applications, a copy of the award letter can be submitted when mailing the application.

Once completed, advance to the **Household Demographics** section.

2

If you, or any household members did not receive any assistance listed above, select **No**. An additional section will appear on the application titled **Income Documentation Screening**. Review instructions for that section below.



Complete the Income Documentation Screening:

- This section of the application will only appear if the applicant:
  - Chooses not to accept Geo Eligibility determination that indicates the Applicant is Geo Eligible (if applicable), and/or
  - Answered **No** to the **Referral Code Screening**, or did not receive a Referral Code from their Utility, NYSERDA, or the Office of Temporary and Disability Assistance (OTDA), and/or
  - Is not eligible for **Categorial** eligibility (i.e., did not receive an award letter for HEAR, SNAP, SSI, TANF, or Public Assistance in the past 12 months).
- Applicants must document income for all members of the household if all previous eligibility requirements could not be met.

Income Type	Acceptable Document	Acceptable Date Range
Social Security	◦ Award Letter ◦ Benefit Statement	Within 12 months
Social Security Disability (SSD)	◦ Award Letter ◦ Benefit Statement	Within 12 months
Pension	◦ Pension check stub showing gross amount ◦ Letter from Pension Board	Within 12 months
Disability (Short Term or Long Term)	◦ Benefit Statement	Within 60 days
Child Support / Alimony	◦ Court Award Letter ◦ Printout from Domestic Relations	Within 12 months (within 60 days if using printout from DR website)
Foster Care Payment	◦ Statement from Social Services	Within 60 days
Workers Compensation	◦ Award Letter ◦ Benefit Statement	Within 60 days
Unemployment	◦ Letter of Determination	Within 60 days
Veterans Benefits	◦ Award Letter ◦ Benefit Statement	Within 12 months
Annuities	◦ Bank Statement	Within 60 days
Salaries/Wages	◦ Pay Stubs	Four weeks of paystubs from the last 60 days
Interest Income	◦ Bank Statement	Within 60 days
Rental Income	◦ Current Lease ◦ Rent Receipt	Within 12 months
Business or Farm Income	◦ Tax Return ◦ IRS Report of Quarterly Earnings ◦ Business records.	Tax Return: Previous Year IRS Report: Previous 3 months Business Records: Previous 3 months
Tax Documentation	Form 1040, 1040A, or 1040EX	Most recent Federal Income Tax Return. ◦ This is only acceptable if all members of the household who were required to file a tax return did so. ◦ Additionally, all sources of income must be documented within the Tax Return for each household member. ◦ If documenting Rental, Business, or Farm income, Applicants must submit corresponding schedules (C, E, and F)

- This section of the application will initially contain a space for the Applicant to add income sources

1

To add spaces for other members of the household for income documentation purposes, click the **Add Household Member** option. This will open a modal window for you to document the household member's:

- First Name
- Last Name
- Age
- If they are a Full-time Student
- Gross Income Amount
- Income Source
- Income Source Frequency
- Verification Method

2

To add an income source for a household member, click the **Add Another Income Source** option below the household member to document the household member's:

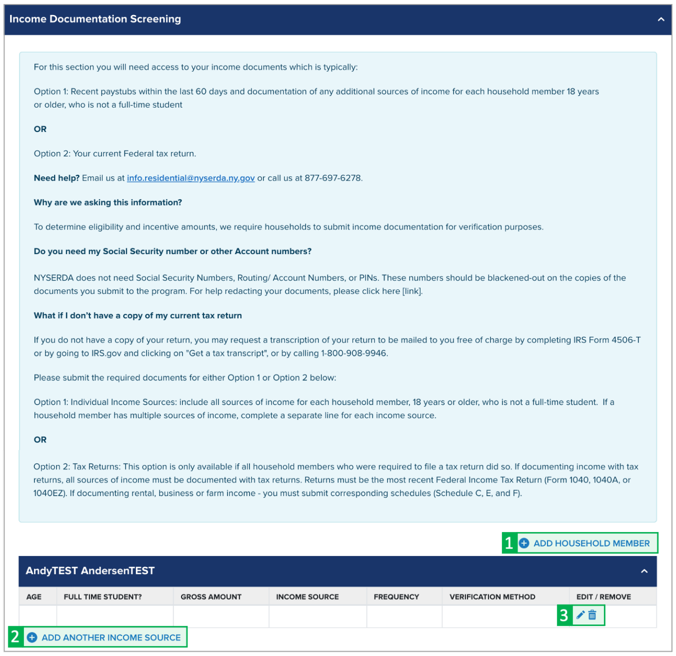
- Age
- If they are a Full-time Student
- Gross Income Amount
- Income Source
- Income Source Frequency
- Verification Method

3

To edit or delete an income source added to a household member, click the **Pencil Icon** (edit) or **Trash Can Icon** (delete) to the far right of the listed income source.

4

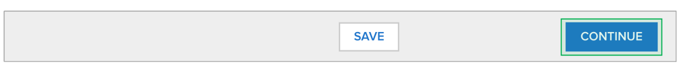
Continue adding household members and income sources as needed.



Save & Continue:

1

To advance to the next step, click **Continue** at the bottom of the page. It is recommended that you click **Save** before clicking **Continue**.



STEP 5: Review Page

Review the Application:

1

Review each section of the **Review Page** for your application. If information on the application is incorrect, use the **Previous** button at the bottom of the page to return to previous steps (pages) and update the information as needed.

Combined Residential Application

Review Page (Step 5 of 7)

Need help? Email us at info.residential@nyserda.ny.gov or call us at 877-697-6278.

Please review your responses below for accuracy and completeness.

Section D: Energy Information:

1

For **Section D: Energy Information**, read through the disclaimer and check the **I agree to the terms and conditions stated above** box.

SECTION D: ENERGY INFORMATION

Property Address

ELECTRIC UTILITY: If you are responsible for the electric bill, provide the following:

Utility Name :	Central Hudson Gas & Electric

CUSTOMER AUTHORIZATION for Release of Fuel/Energy Bills (for previous two years and future three years)

My signature certifies that I am financially responsible for the account(s) listed on this application. I hereby consent and authorize the electricity and fuel suppliers named in this application to release any and all energy usage information, including account number(s), related to the above property address, to representatives of the New York State Energy Research and Development Authority (NYSERDA), and the Weatherization Assistance Program (WAP), and/or its designated representatives for the period beginning two years prior to the application date and ending three years after program participation. I understand that this information will be kept confidential, to the extent permitted by law, and used only for the purpose of determining program eligibility, estimating energy savings, program implementation, and evaluation, including the evaluation of achieved energy savings.

☐ **I agree to the terms and conditions stated above.**

Section H: Applicant Information:

1

After reviewing the complete application, scroll to **Section H: Application Information**,

2

Read through the disclaimer, then click the **Electronic Signature** button.

Applicants are not required to provide **Electronic Signatures**. However applicants must satisfy one of alternate options below when not providing an **Electronic Signature**:

- Applicants who would prefer to print and mail a hand-signed application can bypass the Electronic Signature and click **Pri nt** at the bottom of the page instead. Applicants must also provide, along with the signed application, any supporting documents required to provide proof of choices made during **Ste p 4: Eligibility Screening**.

  Energy Audit Application

  2 Wall Street,

  Albany, New York 12205
- Applicants who would prefer to hand sign the application, but still submit electronically, can click **Pri nt** at the bottom of the page, hand sign the application, and scan the signed application onto their computer for upload during **S tep 6: Project Documents**.

3

You will be directed to electronically sign the application through **DocuSign**. When the page loads, check the agreement box and click **C ontinue** at the top of the page.

4

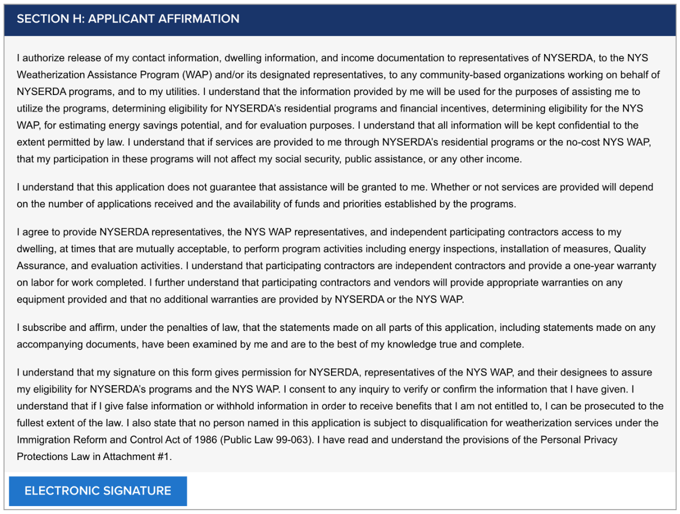
croll to the bottom of the application and click the **Sign** option next to the Applicant Signature field.

5

In the modal window that appears, click **Adopt and Sign** to electronically sign the application. Your **Name**, **Initials** will pre-populate and a, and signature example will already be completed for you.

6

Your signature example will now appear on the signature line for the application. Click **Fi nish** to return to the application.



SECTION H: APPLICANT AFFIRMATION

I authorize release of my contact information, dwelling information, and income documentation to representatives of NYSERDA, to the NYS Weatherization Assistance Program (WAP) and/or its designated representatives, to any community-based organizations working on behalf of NYSERDA programs, and to my utilities. I understand that the information provided by me will be used for the purposes of assisting me to utilize the programs, determining eligibility for NYSERDA's residential programs and financial incentives, determining eligibility for the NYS WAP, for estimating energy savings potential, and for evaluation purposes. I understand that all information will be kept confidential to the extent permitted by law. I understand that if services are provided to me through NYSERDA's residential programs or the no-cost NYS WAP, that my participation in these programs will not affect my social security, public assistance, or any other income.

I understand that this application does not guarantee that assistance will be granted to me. Whether or not services are provided will depend on the number of applications received and the availability of funds and priorities established by the programs.

I agree to provide NYSERDA representatives, the NYS WAP representatives, and independent participating contractors access to my dwelling, at times that are mutually acceptable, to perform program activities including energy inspections, installation of measures, Quality Assurance, and evaluation activities. I understand that participating contractors are independent contractors and provide a one-year warranty on labor for work completed. I further understand that participating contractors and vendors will provide appropriate warranties on any equipment provided and that no additional warranties are provided by NYSERDA or the NYS WAP.

I subscribe and affirm, under the penalties of law, that the statements made on all parts of this application, including statements made on any accompanying documents, have been examined by me and are to the best of my knowledge true and complete.

I understand that my signature on this form gives permission for NYSERDA, representatives of the NYS WAP, and their designees to assure my eligibility for NYSERDA's programs and the NYS WAP. I consent to any inquiry to verify or confirm the information that I have given. I understand that if I give false information or withhold information in order to receive benefits that I am not entitled to, I can be prosecuted to the fullest extent of the law. I also state that no person named in this application is subject to disqualification for weatherization services under the Immigration Reform and Control Act of 1986 (Public Law 99-063). I have read and understand the provisions of the Personal Privacy Protections Law in Attachment #1.

ELECTRONIC SIGNATURE

Print & Continue:

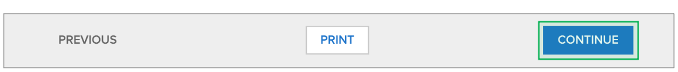
1

If you'd like a copy of the application, click **Print** .

- Applicants who prefer to hand sign the application can bypass the Electronic Signature, clicking the **Print** button to print the application. Hand sign the application then either mail it in along with all required supporting documentation or scan the signed application onto your computer and upload it to the Online Application in the **Step 6: Project Documents**.

2

To advance to the next step, click **Continue** at the bottom of the page.



STEP 6: Project Documents

Review the Required Documents section:

1

The **Required Documents** section will outline any documents that are required as part of you application.

2

If your application requires multiple documents, each will be listed as a separate line item. Click the **Choose File** button to the right of each requested required document to locate and upload the file from your computer.

3

If you Electronically Signed the application in a previous step, there is no need to upload a signed application. However, if you chose to sign the application manually, after printing it, you will be required to upload a signed copy of the application to this section.

Required Documents

Document Name	Add / Update Document	Recent Uploaded Document	Uploaded History	Status
Signed Application *	Choose File No file chosen	Signed Application - Combined Residential Application	Attachment History	Submitted

Complete the Other Documents section:

1

If there are any additional supporting documents you'd like to include as part of the application, click the **Add Another Document** option to locate and upload a document or file from your computer.

2

Continue adding additional documents or files as needed.

Other Documents

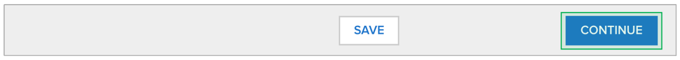
Document Name	Add / Update Document	Recent Uploaded Document	Uploaded History	Status	Remove

ADD ANOTHER DOCUMENT

Save & Continue:

1

To advance to the next step, click **Continue** at the bottom of the page. It is recommended that you click **Save** before clicking **Continue**.



STEP 7: Submission Page

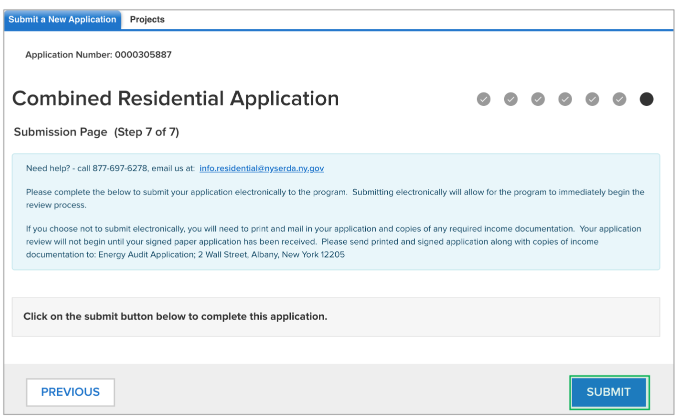
Submit the Application:

1

On the last page of the application, click the **Submit** button.

2

When you have successfully submitted your application, the page will reload and display **Application Status: Your application has been submitted successfully.**



Next Steps

Application Review and Approval

1

CLEAResult Shared Services will review your submitted application. If they require additional information or documentation, you will receive an email communication identifying the needed information.

- Applicants should respond to this communication within ten (10) days to provide the request information.
- Applicants who do not respond after ten (10) days to the initial notice will receive two (2) additional notices (the second at Day 20 and the third at Day 30) to remind them of the required information they must provide.
- Once an applicant responds to any of the 3 (three) communications, the application will continue through the approval process.

- Applicants who fail to respond to any of the three (3) notices will have their application cancelled systematically.

2 If you application is approved, you will receive an email notice guiding you on next steps.

3 If you application is rejected, you will receive an email notice outlining the reason for denial.

Reviewing Submitted Applications

Reviewing EmPower+ Applications

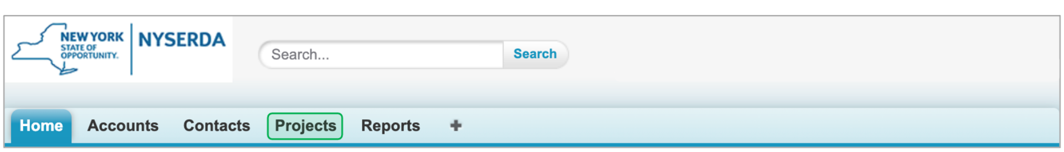
Submitted EmPower+ Application are reviewed by CLEAResult Shared Services within Salesforce. Applications, once approved, are systematically pushed into Uplight for future project management. Note that paper applications received from Applicants must first be submitted through the Online Application process before they can be reviewed by CLEAResult Shared Services. Access each step below by clicking on the **learn more...** link to expand the section and review the related instructions.

> The instructional materials below are intended to provide guidance for CLEAResult Shared Services when reviewing submitted applications in Salesforce.

Step 1: Access Submitted EmPower+ Applications

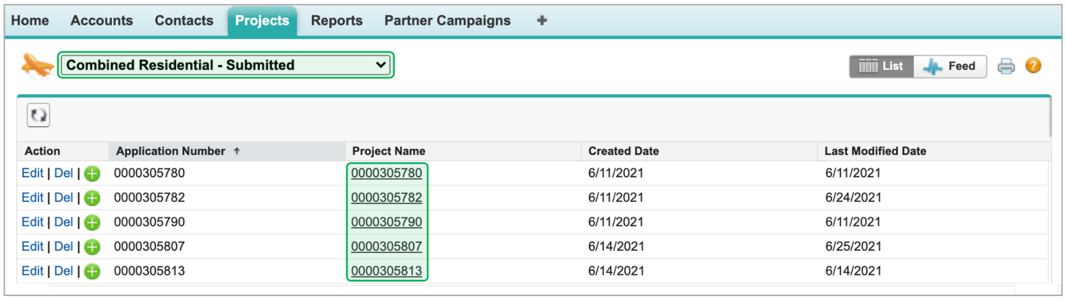
1 Log into Salesforce.

2 Access the **Projects** tab.



3

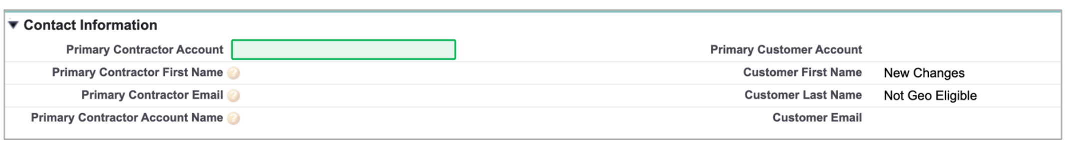
On the **Projects** page, select **EmPower+ - Submitted** from the drop-down menu to view all applications in **Submitted** status. Then, click on the link in the **Project Name** column to open a specific **Application Record**.



4

Click on the link in the **Project Name** column to open a specific **Application Record**.

Submitted applications that have no **Primary Contractor Account** listed in the **Contact Information** section of the **Application Record i**ndicate that the applicant selected **Select Next Available** for the **Contractor Selection** drop-down on step (page) 3 of the application and will need to be assigned by CLEAResult Shared Services as part of the application review in both **Sale sforce** and **Uplight**.

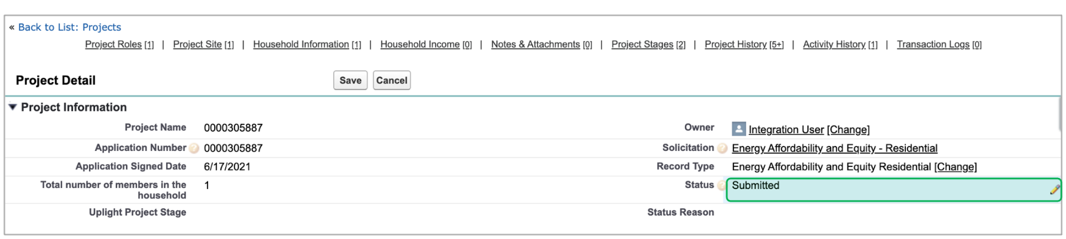


Step 2: Update the Application Status

Once in the **Application Record**, update the application **Status** from **Submitted** to **Under Review** in the **Project Detail** section. This change lets others in CLEAResult Shared Service know this application is currently being reviewed.

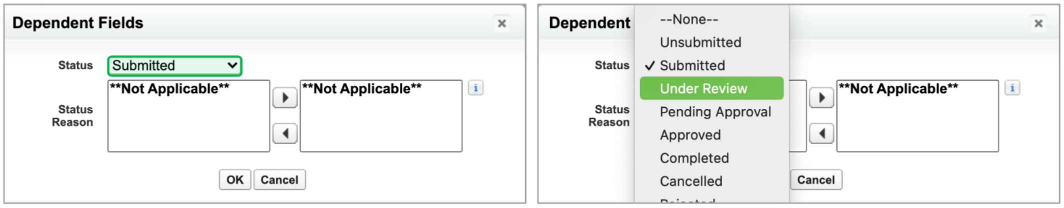
1

Double click on the **Submitted** status field.



2

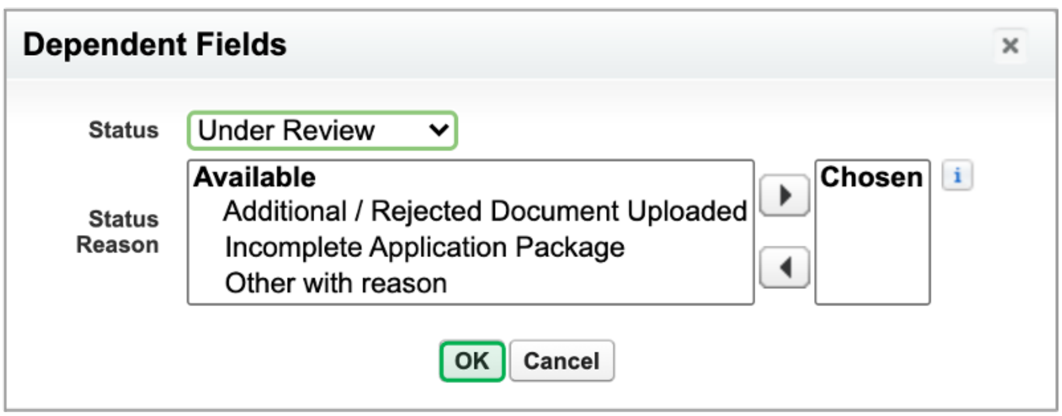
A modal window will appear. Select **Under Review** from the drop-down, currently set as Submitted.



3

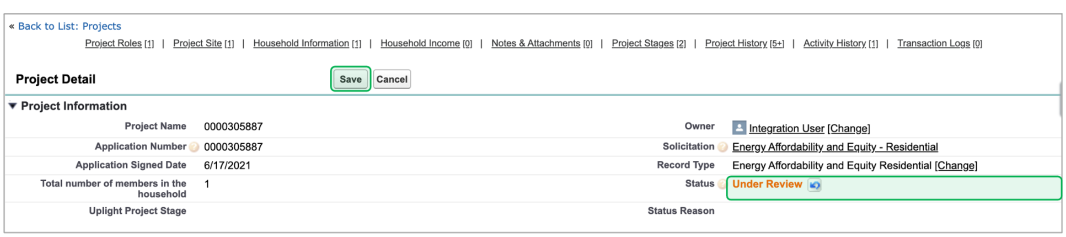
Click **Go** to save the change.

Once **Under Review** is selected, **Status Reasons** associated with the selected status will populate. These **Status Reasons** should not be selected at this time. However, if in the review process, issues with application are uncovered, CLEAResult Shared Services should re-access the application record and choose a corresponding status reason to identify the application issue(s) for remediation. This will indicate what missing information is required for an approval.



4

The application record page will reload, displaying **Under Review** in orange text in the **Status** field. Be sure to click **Save** before leaving the application record or navigating away from this page, otherwise the change in **Status** will not apply.



5

Once the change is made to the application **Status**, the application will no longer appear in the **EmPower+ - Submitted** project queue and will now be located in the **EmPower+ - Under Review** project queue.

Step 3: Assign Contractor (If Applicable)

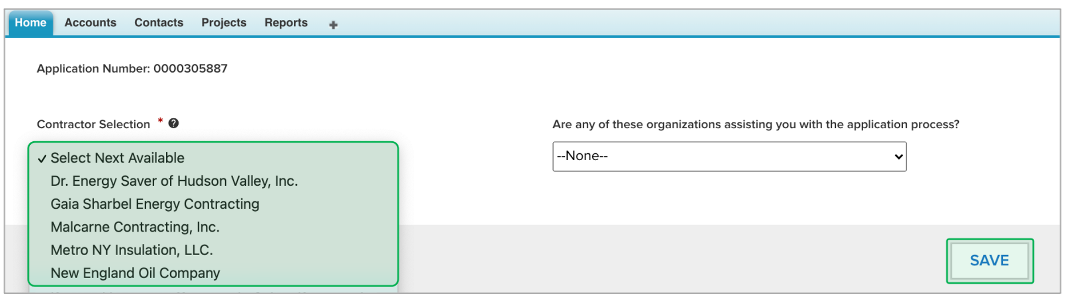
If the applicant selected **Select Next Available** for the **Contractor Selection** drop-down on step (page) 3 of the application, the **Contact Information** section of the application record will be blank. CLEAResult Shared Services must assign a Contractor to the application.

1

Scroll down to the **Custom Links** section of the application record and click the **Part ner Information** link. This will open step (page) 3 of the submitted application in a new browser tab.

2

On step (page) 3 of the submitted application, use the **Contractor Selection** drop-down to select the next available contractor. Click **Save** when complete.



3

Close the tab after clicking **Save**. Back on the application record in Salesforce, refresh the browser window to re-load the application record page. The **Contractor Information** section should now be populated with the selected Contractor.

Step 4: Review Project History for Applicant

Next, CLEAResult Shared Services should review previous projects for the applicant within the last three (3) years.

1

Navigate back to the **Custom Links** section of the application record in Salesforce. Two additional links appear in this section:

- **Completed Residential Projects NYHEP**
  This link accesses Salesforce reporting that locates project records where ANY of the following information matches with the applicant:
  - Customer First Name

- Customer Last Name
- Customer Street Address
- Customer City
- Customer State
- Customer Zip

- **Completed Res Proj NYHEP Exact Match**
  This link accesses Salesforce reporting that locates project records where ALL of the following information matches with the applicant:
  - Customer First Name
  - Customer Last Name
  - Customer Street Address
  - Customer City
  - Customer State
  - Customer Zip

2

Click on each link to navigate to the associated Salesforce reporting.

3

This review is to evaluate if Applicants with submitted applications have received program services within the last 3 years.

Step 5: Review the Application

Shared Services should then review the application to determine if any additional information is needed from the applicant. Keep in mind if this step is not completed at the same time as the steps listed above, Shared Services will need to access the **EmPower+ - Under Review** project queue if the status of the application has already been changed.

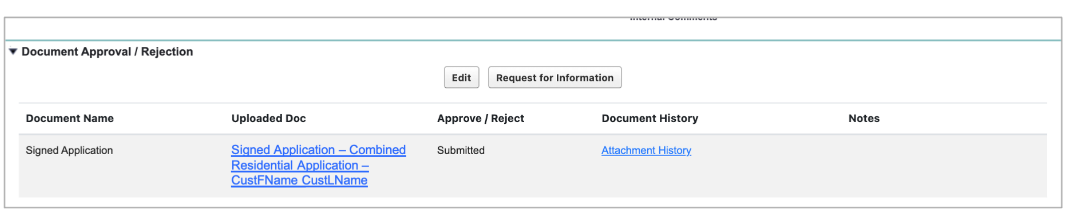
1

Review the **Application Record** to validate that all required information is documented such as, but not limited to:

- If the Applicant rents or owns the site
- Utility information
- Site information
- Household information
- Household income

2

Then, scroll down to the **Document Approval / Rejection** section of the application record.



3

Using the links associated with each document, click to access. Review the Signed Application first to determine, based on the applicant's responses, if any additional documentation is needed. Then, review any other attached documents to determine if additional information is needed from the applicant, such as:

- Categorical Screening Documents
- Income Documentation
- Landlord Agreements (if the Applicant rents)

4

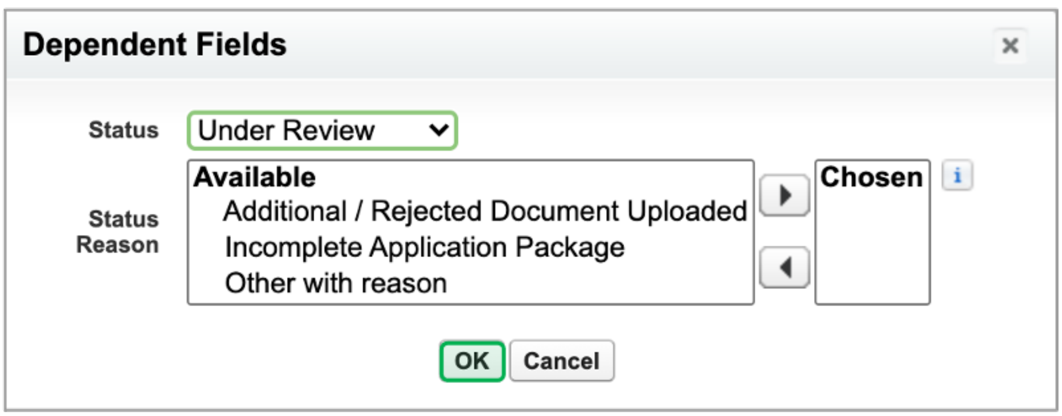
If no additional information is needed, move on to the next step.

5

If more information is required of the applicant, follow the instructions in **Step 2: Update the Application Status** on this page to update the **Status** field that identifies the issue with the current application.

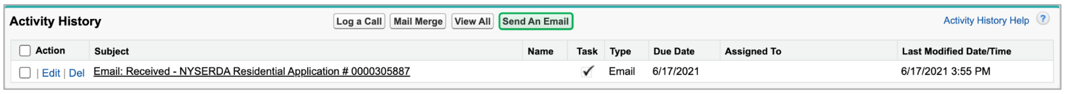
6

After double-clicking the **Status** field, use the **Status Reason** field to locate and select the reason the application will remain **Under Review**. Be sure to click the right-facing arrow to the right of the **Status Reason** field once you've selected the **Status Reason** to move it over into the **Chosen** field otherwise it will not apply. Click **OK** when complete.



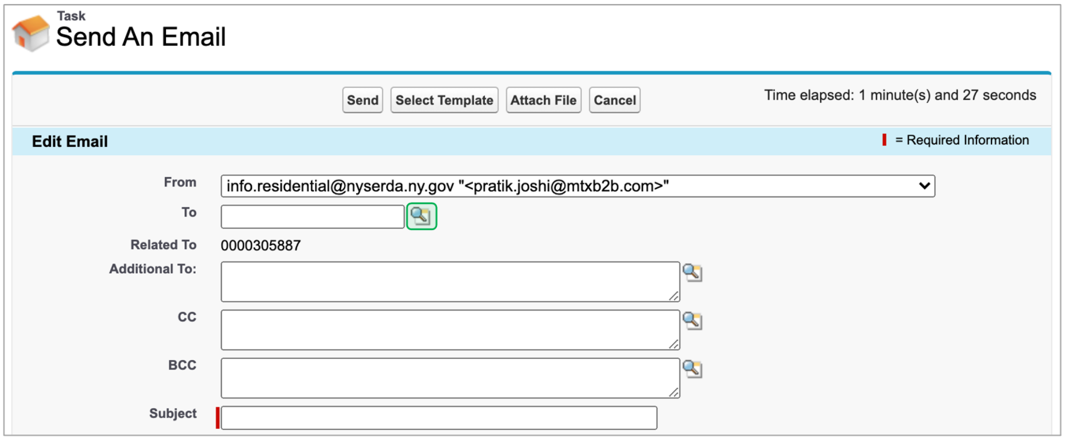
7

Shared Services must then send an email to the applicant requesting the additional information. Scroll down to the **Activity History** and click the **Send An Email** button.



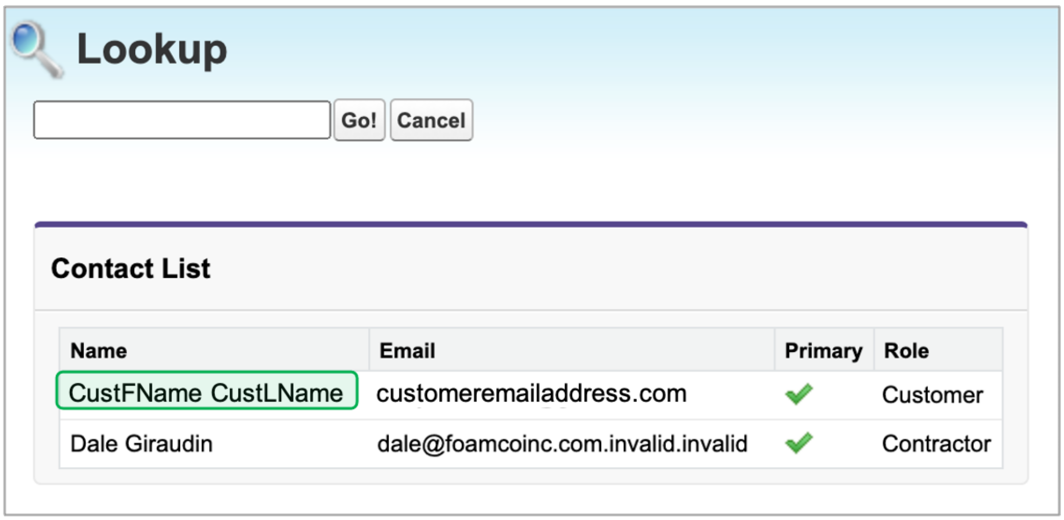
8

Once the **Send An Email** page loads, click the lookup icon to the right of the **To** field.



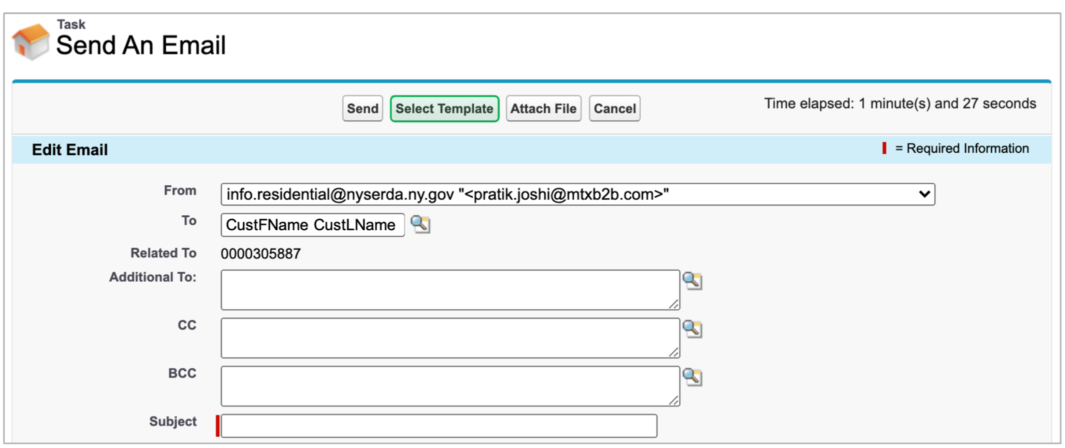
9

A modal window will appear. Select the **Customer** (applicant) from the list.



10

Then, click the **Select Template** button.



11

A modal window appears with a list of emails templates. Scroll through to locate the template that will request the needed information from the applicant.

12

Once a template is selected, the **Send An Email** screen will update to populate the **Subject** and **Body** of the email from the template chosen. Once the template has been applied, changes can be made to the subject and body of the email. Scroll down to the bottom of the page when ready and click **Send**.

13

Back on the application record in Salesforce, the **Activity History** section now includes the new email sent to the applicant.\ and the **Waiting for External Response** checkbox will be checked.

14

If the Applicant uploads the requested documentation to their application after receiving the email notification, the **Waiting for External Response** checkbox will systematically uncheck. CLEAResult Shared Services will use this indicator to sort the **EmPower + - Under Review** project queue to locate projects with newly uploaded documentation for review.

15

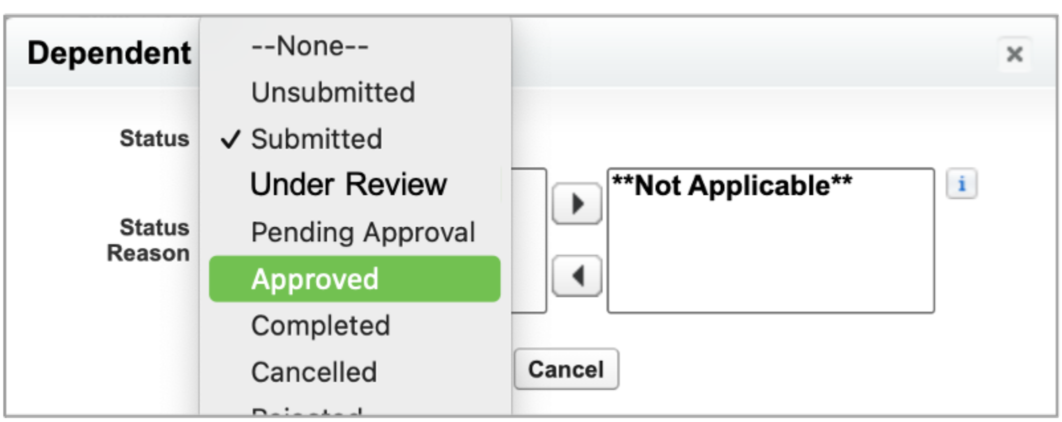
If the Applicant does not respond to the initial email notification, additional systematic notifications will be sent. After the third notification, if the Applicant continues not to respond with the required documentation, the application will systematically move to the **EmPower + - Cancelled** project queue.

Step 6: Application Approval

The final step is to approve the application in Salesforce. Applications, once approved, are systematically pushed into **NYHEP** for further Enrollment Management.

1

Return to the **Project Details** section of the application and double-click the **Status** field. When the modal window opens, switch the drop-down, with **Under Review** currently selected, and change it to **Approved**. Click OK**.**



2

This ends the work Shared Services performs with respect to submitted EmPower + Application.

EmPower+ Home