# **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**



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

Submit a New Application

Projects

Choose a program

Combined Residential Application

Please complete the following application to see if you qualify for a no-cost energy audit and incentives towards making your home more comfortable and energy efficient.

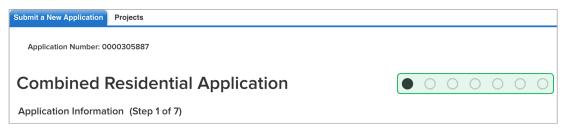
We will ask questions about the number of people living in your home and income sources, your electric and heating fuel providers, and the county where you live to help determine your incentive eligibility.

If you are an electric customer of PSEGLI, and have not received a referral letter from

NYSERDA, please reach out to your utility for current offers.

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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.





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.



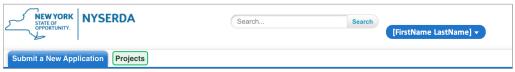
Every step, or page, throughout the application contains a **Save** button at the bottom of the page. Click **Save** before exiting the application if you do not have time to complete it in one sitting.



(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:

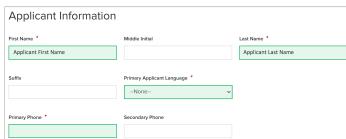
Your First Name and Last Name will pre-populate.

Select your Preferred Applicant Language from the drop-down.

Provide your Primary Phone Number.

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

Applicant Information



# Complete the Site Information section:



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.

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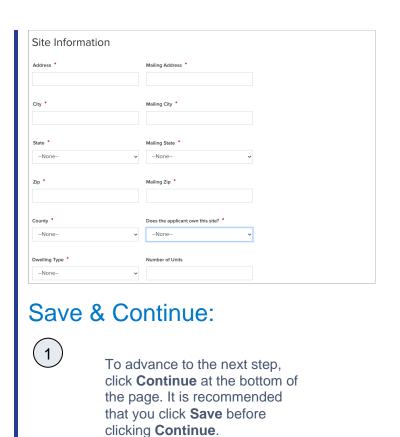
Select the appropriate response for the **Does the applicant own this site** drop down. This field identifies if the applicant is the owner of the dwelling associated with the address entered into the application.

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

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



# STEP 2: Utility Information

# Complete the Utility Information section:

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

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)

(2)

CONTINUE

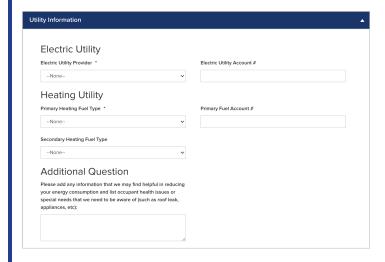
Include Electric Utility and Primary Fuel Account Numbers. These fields are optional. However, providing NYSERDA with this information will enable us to provide the most accurate and effective recommendations for work that will be performed at the site.



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



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:



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:

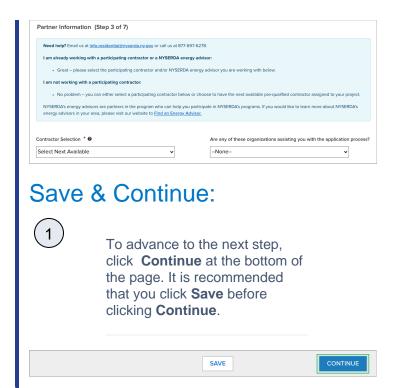


Select a contractor from the **Contractor Selection** drop-down.

- 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.



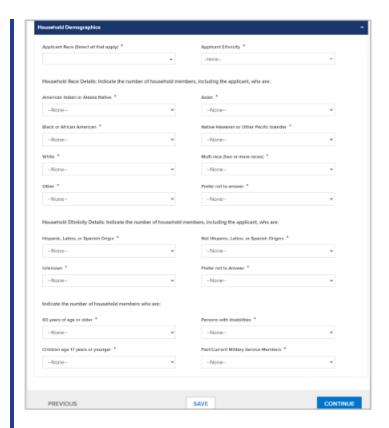
While not required, you can help NYSERDA understand if an independent organization has been assisting you with the application process. If that organization appears on the Are any of these organizations assisting you with the application process? dropdown, select it from the list.



# STEP 4: Eligibility Screening Household Information & Demographics



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



# Complete the Referral Code Screening:



If you received a letter from NYSERDA with a Referral Code, select Yes in response to the question, enter the Referr al Code in the provided field, then skip to Complete the Hou sehold 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.



However, if you did not receive a letter with a **Referral Code**, select **No**. An additional section will appear on the application titled **Categorical 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.



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	<ul><li>Award Letter</li><li>OTDA provided HEAP list</li></ul>	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)	<ul><li>Award Letter</li><li>Benefit</li><li>Statement</li></ul>	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.



If you, or any household members did not receive any assistance listed above, select **No**. An additional section will appear on the application titled **I ncome 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
  - 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	<ul><li>Award Letter</li><li>Benefit Statement</li></ul>	Within 12 months
Social Security Disability (SSD)	<ul><li>Award Letter</li><li>Benefit Statement</li></ul>	Within 12 months
Pension	<ul> <li>Pension check stub showing gross amount</li> <li>Letter from Pension Board</li> </ul>	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	<ul> <li>Statement from Social Services</li> </ul>	Within 60 days
Workers Compensation	<ul><li>Award Letter</li><li>Benefit Statement</li></ul>	Within 60 days
Unemployment	Letter of     Determination	Within 60 days
Veterans Benefits	<ul><li>Award Letter</li><li>Benefit Statement</li></ul>	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	<ul><li>Current Lease</li><li>Rent Receipt</li></ul>	Within 12 months
Business or Farm Income	<ul> <li>Tax Return</li> <li>IRS Report of Quarterly Earnings</li> <li>Business records.</li> </ul>	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



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 Ad d Another Income Source option below the household member to document the household member's:

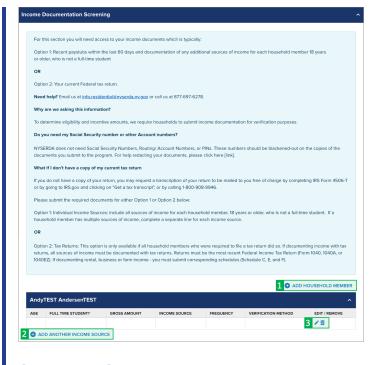
- Age
- If they are a Full-time Student
- Gross Income Amount
- Income Source
- Income Source Frequency
- Verification Method



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.



Continue adding household members and income sources as needed.



#### Save & Continue:



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

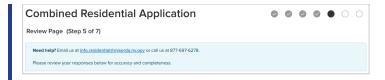
SAVE

# STEP 5: Review Page

# Review the Application:



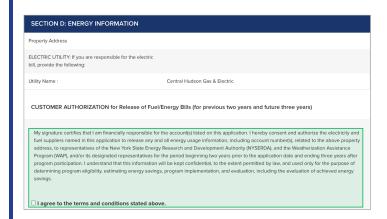
Review each section of the **Revi ew Page** for your application. If information on the application is incorrect, use the **Previous** button at the bottom of the page to return to previous steps (pages) and update the information as needed.



# Section D: Energy Information:



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



## Section H: Applicant Information:



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



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 Print 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 Step 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 **Print** at the bottom of the page, hand sign the application, and scan the signed application onto their computer for upload during **Step 6: Project Documents.** 

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

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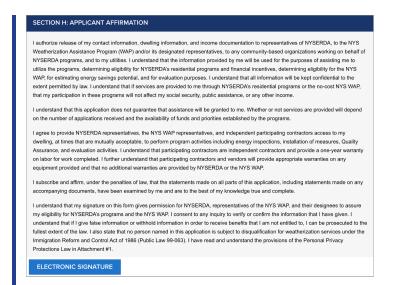
croll to the bottom of the application and click the **Sign** option next to the Applicant Signature field.

(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 **Fin ish** to return to the application.



#### **Print & Continue:**



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 Pri nt 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.



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

PREVIOUS PRINT CONTINUE

# STEP 6: Project Documents Review the Required Documents section:



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



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.



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.



# Complete the Other Documents section:



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.



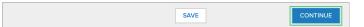
Continue adding additional documents or files as needed.



#### Save & Continue:



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



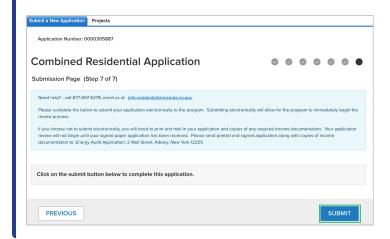
# STEP 7: Submission Page Submit the Application:



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



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



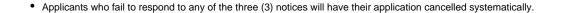
# **Next Steps**

## **Application Review and Approval**



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.





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



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