

Introduction

The Combined Residential 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 nyserdera.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.

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:

- NYSEDA 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 CEAs who are assisting Applicants when completing and submitting a Combined Residential EmPower+ Application. When assisting Applicants, refer to the Submitting a Combined Residential Application tab to help walk them through the process. Additionally, applicants can be provided the following link which will allow them to access related material specific to their needs: <https://knowledge.nyserdera.ny.gov/pages/viewpage.action?pageId=81855384>

Presentation Materials

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



EAE Combined App...ontractors).pptx

Training Videos

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

Your browser does not support the HTML5 video element

Managing Portal Access

Salesforce Portal

The Salesforce Portal allows Participating Contractors to manage and monitor Combined Residential projects assigned to them. Additionally, the Salesforce Portal allows Participating Contractors to communicate with NYSERDA Program and Program Implementation staff throughout the project lifecycle through use of the Salesforce Portal Chatter Feed.

i The instructional materials below are intended to provide guidance for Participating Contractors when adding or removing users from the Salesforce Portal. The instructions on this page can only be completed by existing contractors who have been assigned the **Manage Users Tab** permission. This permission set must be set either by a NYSERDA employee or an existing contractor in your organization that has previously been granted this access. If you have access to this permission set you will have access to the **Manage Users** tab after logging into the Salesforce Portal.

Adding New Portal Users

1

Log into the Salesforce Application Portal.

2

Click on the **Manage Users** tab.

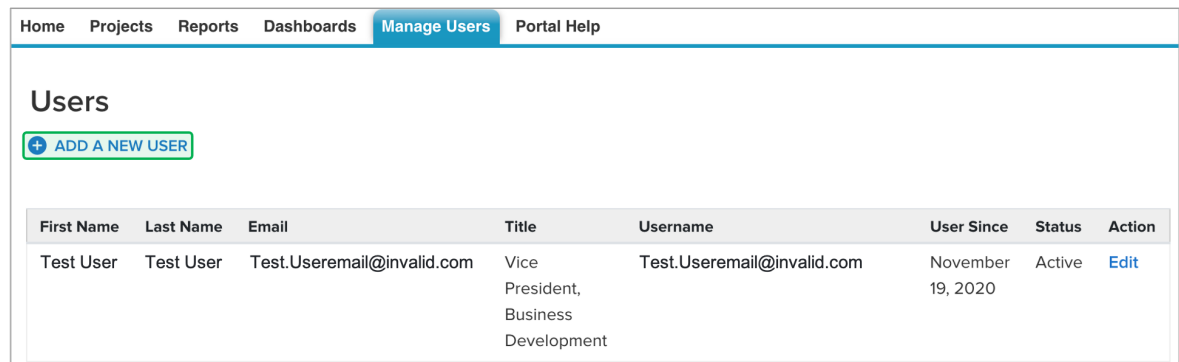


This tab will only appear for Portal users who have previously been granted Admin access.



3

Click the **Add A New User** option. A modal window will open.



4

Enter the new users **First Name**, **Last Name** and **Email Address**. If this new user should also have access to the Salesforce Portal as an Admin user, check the **Admin** box.

Add a new User

×

Please select an existing contact to create new user

Info: There are no existing contacts available to enable as a user.

OR

Please enter new user information:

First Name

Last Name

Email

Admin

☐

CLOSE

SAVE CHANGES

✓ If your organization currently has other members listed as Contacts in the Salesforce Application Portal that are not set up as Portal users, the **Please select an existing contact to create new user** section of the modal window will contain a drop-down with a list of all Portal contacts. If the user you want to add appears on this drop-down list, you can select their name. This will auto-populate all fields on the modal window except the **Admin** box.

5

When you have completed the form, click Save Changes to add the new user for Portal access.

Removing Portal Users

1

Log into the Salesforce Application Portal.

2

Click on the **Manage Users** tab.

 This tab will only appear for Portal users who have previously been granted Admin access.

[Home](#) [Submit a New Application](#) [Projects](#) [Project Invoices](#) [Manage Users](#) [Cases](#)

3

Click the **Edit** link in the **Action** column. A modal window will open.

Home

Projects

Reports

Dashboards

Manage Users

Portal Help

Users

+

ADD A NEW USER

First Name	Last Name	Email	Title	Username	User Since	Status	Action
Test User	Test User	Test.Useremail@invalid.com	Vice President, Business Development	Test.Useremail@invalid.com	November 19, 2020	Active	Edit

4

On the modal window uncheck the **Active** box to remove the user from Portal access.

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** option.

Salesforce Customer Login

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

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.

Submit a New Application Projects

Application Number: 0000305887

Combined Residential Application

Application Information (Step 1 of 7)



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.

SAVE

CONTINUE

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

Action	Project Name	Application Number	Status	Created Date	Last Modified Date
Edit	0000305887	0000305887	Unsubmitted	6/16/2021	6/16/2021

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.

Applicant Information

First Name *

Applicant First Name

Middle Initial

Last Name *

Applicant Last Name

Suffix

Primary Applicant Language *

--None--

Primary Phone *

Secondary Phone

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**.

Site Information

Address *

Mailing Address *

City *

Mailing City *

State *

--None--

Mailing State *

--None--

Zip *

Mailing Zip *

County *

--None--

Does the applicant own this site? *

--None--

Dwelling Type *

--None--

Number of Units

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**.

SAVE

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.

Utility Information

Electric Utility

Electric Utility Provider *

--None--

Electric Utility Account #

Heating Utility

Primary Heating Fuel Type *

--None--

Primary Fuel Account #

Secondary Heating Fuel Type

--None--

Additional Question

Please add any information that we may find helpful in reducing your energy consumption and list occupant health issues or special needs that we need to be aware of (such as roof leak, appliances, etc):

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**.

SAVE

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 NYSEERDA 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?** drop-down, select it from the list.

Partner Information (Step 3 of 7)

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

I am already working with a participating contractor or a NYSEERDA energy advisor:

- Great – please select the participating contractor and/or NYSEERDA energy advisor you are working with below.

I am not working with a participating contractor:

- No problem – you can either select a participating contractor below or choose to have the next available pre-qualified contractor assigned to your project.

NYSEERDA's energy advisors are partners in the program who can help you participate in NYSEERDA's programs. If you would like to learn more about NYSEERDA's energy advisors in your area, please visit our website to [Find an Energy Advisor](#).

Contractor Selection * ⓘ

Select Next Available Are any of these organizations assisting you with the application process?

--None--

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**.

SAVE 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 **Categorical Screening**. Review instructions for that section below.

The screenshot shows a form titled "Referral Code Screening". It contains a question: "Have you recently received a letter from NYSERDA with a referral code?" with radio button options for "Yes" (selected) and "No". To the right of the question is a text input field labeled "Referral Code" with a red asterisk indicating it is required.

Complete the Categorical Screening:

i 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.

Categorical Screening

Have any household members received HEAP, SNAP (Food Stamps), SSI, TANF or Public Assistance in the past 12 months? *

☒ Yes
☐ No

Check all the apply *

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, NYSEDA, or the Office of Temporary and Disability Assistance (OTDA), and/or
 - Is not eligible for **Categorical** 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

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@nysedra.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 **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**.

3

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.

4

Scroll 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 **Finish** 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.

PREVIOUS

PRINT

CONTINUE

STEP 6: Project Documents

Review the Required Documents section:

1

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

SAVE

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.**

Submit a New Application Projects

Application Number: 000305887

Combined Residential Application

Submission Page (Step 7 of 7)

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

Please complete the below to submit your application electronically to the program. Submitting electronically will allow for the program to immediately begin the review process.

If you choose not to submit electronically, you will need to print and mail in your application and copies of any required income documentation. Your application review will not begin until your signed paper application has been received. Please send printed and signed application along with copies of income documentation to: Energy Audit Application; 2 Wall Street, Albany, New York 12205

Click on the submit button below to complete this application.

PREVIOUS SUBMIT

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

3

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

Accessing a Submitted Application

Accessing Submitted EmPower+ Applications

NYSERDA Energy Advisors and Participating Contractors can access submitted EmPower+ Application from their Salesforce Portal account. To make locating specific applications easier, a **Created By** field has been added to help quickly identify who submitted each application

i The instructional materials below are intended to provide guidance for NYSERDA Energy Advisors and Participating Contractors when accessing submitted applications in Salesforce.

1

After logging into Salesforce, click the **Enrollments** tab.

2

A list of **Submitted** applications will appear on the **Enrollments** list. To locate a specific application, review the name in the **Created By** column to identify who submitted each application. This will make locating specific applications easier to perform.

Home	Submit a New Application	Projects	Project Invoices	Manage Users	Cases	Project Inspections	Knowledge	Dashboards	Case Tasks	Generate Campaign
Combined Residential - All										
Project Name ↑	Application Number	Record Type	Customer Name	Primary Contractor A...	Status	Status Reason	Created By	A B		

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**.

Campaign Name	Status	Created Date	Created By	Campaign Code	Campaign URL	Action
PC-0177	Inactive	June 30, 2021		787024bcb5c638b5	https://uat-nyserda-portal.cs32.force.com/customer/apex/Core_Registration_Page?programName=Energy_Affordability_and_Equity_Residential&ccode=787024bcb5c638b5	Edit

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.

Home Submit a New Application Projects Project Invoices Manage Users Cases Project Inspections Knowledge Dashboards Case Tasks Generate Campaign						
Existing Campaigns						
+ GENERATE CAMPAIGN						
Show 10 entries						
Campaign Name	Status	Created Date	Created By	Campaign Code	Campaign URL	Action
PC-0180	Active	July 1, 2021		99aac4ac44e36aee	https://uat-nyserda-portal.cs32.force.com/customerr/apex/Core_Registration_Page?programName=Energry_Affordability_and_Equity_Residential&cocode=99aac4ac44e36aee	Edit
PC-0177	Inactive	June 30, 2021		787024bcb5c638b5	https://uat-nyserda-portal.cs32.force.com/customerr/apex/Core_Registration_Page?programName=Energry_Affordability_and_Equity_Residential&cocode=787024bcb5c638b5	Edit

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**.

Home Submit a New Application Projects Project Invoices Manage Users Cases Project Inspections Knowledge Dashboards Case Tasks Generate Campaign						
Existing Campaigns						
+ GENERATE CAMPAIGN						
Show 10 entries						
Campaign Name	Status	Created Date	Created By	Campaign Code	Campaign URL	Action
PC-0180	Active	July 1, 2021		99aac4ac44e36aee	https://uat-nyserda-portal.cs32.force.com/customerr/apex/Core_Registration_Page?programName=Energry_Affordability_and_Equity_Residential&cocode=99aac4ac44e36aee	Edit

8

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

×

Edit Campaign

Campaign Name *

PC-0180

Campaign Code *

99aac4ac44e36aee

Status *

Active

--None--

✓ Active

Inactive

CLOSE

SAVE CHANGES

9

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

Home Submit a New Application Projects Project Invoices Manage Users Manage Eligible Vehicles Cases Project Inspections Knowledge Dashboards									
Existing Campaigns									
Show 10 entries + GENERATE CAMPAIGN									
Campaign Name	Status	Created Date	Created By	Campaign Code	Campaign URL	Action	#Apps		
PC-0103	Active	August 5, 2022	Señor Residential Test	297935e994ecb0e7	https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Eenergy_Affordability_and_Equity_Residential&ccode=297935e994ecb0e7	Edit View	0		
PC-0088	Active	March 30, 2022	Señor Residential Test	3a6b09ee453c4b51	https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Eenergy_Affordability_and_Equity_Residential&ccode=3a6b09ee453c4b51	Edit View	2		
PC-0087	Active	March 30, 2022	Señor Residential Test	37a49d2c33bd7d8e	https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Eenergy_Affordability_and_Equity_Residential&ccode=37a49d2c33bd7d8e	Edit View	1		

10

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

Home Submit a New Application Projects Project Invoices Manage Users Manage Eligible Vehicles Cases Project Inspections Knowledge Dashboards									
Existing Campaigns									
Show 10 entries + GENERATE CAMPAIGN									
Campaign Name	Status	Created Date	Created By	Campaign Code	Campaign URL	Action	#Apps		
PC-0103	Active	August 5, 2022	Señor Residential Test	297935e994ecb0e7	https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Eenergy_Affordability_and_Equity_Residential&ccode=297935e994ecb0e7	Edit View	0		
PC-0088	Active	March 30, 2022	Señor Residential Test	3a6b09ee453c4b51	https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Eenergy_Affordability_and_Equity_Residential&ccode=3a6b09ee453c4b51	Edit View	2		
PC-0087	Active	March 30, 2022	Señor Residential Test	37a49d2c33bd7d8e	https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Eenergy_Affordability_and_Equity_Residential&ccode=37a49d2c33bd7d8e	Edit View	1		

11

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

Home Submit a New Application Projects Project Invoices Manage Users Manage Eligible Vehicles Cases Project Inspections Knowledge Dashboards Case Tasks Generate Campaign									
EAE Projects By Campaign Code									
Report Generation Status: Complete									
Report Options: Summarize information by: Status Show: All projects Time Frame: Date Field: 75% Interconnection Payment Due Date Range: Custom									
Run Report Hide Details Printable View Export Details									
Filtered By: Project: Record Type equals Energy Affordability and Equity Residential AND Contractor Supplier ID (Project) equals 3a6b09ee453c4b51									
Grouped By: Status Sorted By: Status									
Project Name	Application Number	Customer Name	Primary Contractor Account	Status Reason	Waiting for External Response	Submitted Date	Uplight Project Stage	Migration ID	
Status: Approved (2 Records)									
0000445800	0000445800	Magesh Test	Residential Test Account	-	☐	3/18/2022 2:08 PM	-	3761	
0000441800	0000441800	This is a Test I say	Residential Test Account	-	☐	7/13/2022 4:01 PM	-	3698	
Grand Totals (2 records)									

Case Management

Case Creation

Your browser does not support the HTML5 video element

Case Escalation Process

Your browser does not support the HTML5 video element

Monitoring & Checking on Case Status

Your browser does not support the HTML5 video element

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