



SOLAR THERMAL INCENTIVE PROGRAM

Customer Step by Step Guide

HERE ARE SOME STEPS TO HELP YOU GET STARTED

Are you tired of paying to heat your hot water? Do you have a sunny, south-facing roof? Are you interested in renewable technologies? If you answered yes to any of these questions, you may be a candidate for participation in the NYSERDA Solar Thermal Incentive Program (Program). Solar thermal is a technology that uses the sun to heat water. It's not the same as photovoltaics (PV) which uses the sun to create electricity.

Find a Solar Thermal (ST) Eligible Installer to learn about installation options and requirements. Only Eligible Installers can apply for incentives from the Program. A list of Eligible Installers is available on NYSERDA's [website](#). In order to be a Solar Thermal Eligible Installer with NYSERDA, installers must demonstrate that they have the technical expertise and training required to install a solar thermal system that maximizes thermal output and efficiency. NYSERDA recommends that you contact at least three Eligible Installers to receive cost proposals for your system. Installers should conduct a site visit to assess the solar resource and your site before providing a cost proposal. Additional information about the Program's rules and procedures is available in [the Solar Thermal Program Manual](#).

Ask the Eligible Installer questions such as:

- Are they a NABCEP-certified Solar Thermal Installer? Or do they have at least 18 hours of Manufacturer Certified Solar Thermal training? Or are they Journeymen that have completed an approved NYS DOL Apprenticeship Program through the United Association of Plumbers, Fitters, Welders, and HVAC Service Techs?
- How many solar thermal hot water systems they have installed?
- What are their typical prices based on system size, etc?
- Will you need a building permit?
- Does your system need to be approved by the local code official?
- What other approvals are required in your jurisdiction?

Call your town, city, or local government and the utility to learn more about their requirements for your Solar Thermal System. Be sure you know who is responsible for obtaining and paying for any and all permits, inspections, and approvals. These responsibilities should be addressed in your written agreement with an Eligible Installer.

If you are a residential customer, expect a "Clipboard" Energy Efficiency Audit to be performed. To access the ST Program incentives, your Eligible Installer must complete a clipboard audit which consists of two main components: an interview of the home/building owners to ascertain energy use habits and the age of the building, and an inspection of the building to identify potential energy efficiency measures, especially low- and no-cost measures which could reduce the electricity load of the building. This audit would include an inspection of the hard-wired lighting systems and free-standing light fixtures, appliance ages and whether they are ENERGY STAR[®] qualified, the presence of advanced power strips for consumer electronics, existence of "phantom loads" related to consumer electronics and battery chargers, use of programmable thermostats or timers for air conditioners, age and condition of the doors and windows, and inquiries to the owner regarding any recent installation of insulation. The ST Installer must conclude the audit with a homeowner debriefing. The installer will leave a copy of the Clipboard Audit report with you at the end of the inspection, which will include a description of the home, recommendations of changes to reduce electric consumption, and easy fixes the homeowner can do. The Clipboard audit should last no more than 60 minutes. You will not be required to implement energy efficiency measures as a prerequisite to receiving a ST



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incentive.

If you are a non-residential building owner, you must be provided with information on ENERGY STAR's Portfolio Manager Benchmarking Tool or other equivalent tool and, if requested, the Eligible Installer will assist you with entering utility bill information into the Tool in order to produce an EUI (Energy use index) and, where applicable, an ENERGY STAR score. You will not be required to benchmark or implement energy efficiency measures as a prerequisite to receiving a ST incentive.

Completing and submitting an Incentive Application. Once you have decided to install a Solar Thermal hot water heating system and you have chosen an Eligible Installer, the following forms need to be completed, signed, and submitted to NYSERDA by your Eligible Installer:

- A completed application that is legible and accurate
- Customer Purchase/Lease Agreement. This is the contract between you and the Eligible Installer for the installation of a qualified Solar Thermal hot water system. This agreement should outline everything the Eligible Installer will be doing for you with respect to the installation, and should include details such as system costs, installation and payment schedule, responsibilities related to all permitting, etc. The Agreement must clearly apply the full amount of the NYSERDA incentive towards the price of the system. You may wish to consult an attorney before signing.
- The Addendum to the Customer Purchase/Lease Agreement must be signed and attached to the written Customer Purchase Agreement. The Addendum includes provisions designed to protect you. The eligibility of your system for the payment of incentives will depend on the Eligible Installer's adherence to its terms.

Your incentive application is submitted by your Eligible Installer. Once you have signed all of the paperwork, your Eligible Installer will submit your application package to NYSERDA for review. You may want to ask the Eligible Installer for a copy of the package for your records.

Note that systems partially installed or completed prior to the Installer receiving written notification of approval may jeopardize the incentive payment. **Do not let an Eligible Installer begin installing the Solar Thermal system until you have confirmation that NYSERDA has approved the system and that the incentive funds have been reserved for your project. Funding will only be reserved for a customer once the application for incentives has been received by NYSERDA.** The installer is responsible for notifying the customer of NYSERDA's approval of a project application.

It is important that you, the customer, keep track of any deadlines. The eligibility of your Solar Thermal system for incentive payments depends on meeting the deadlines as outlined in the [ST Program Manual](#). Project Extensions may be granted, upon written request, on a case-by-case basis if there are legitimate and verifiable issues related to new construction or equipment availability. Project extension requests must provide a detailed description of the issues and provide any back up documentation. The request must be signed by the customer and the installer. If the installation of your Solar Thermal system is not progressing according to schedule, contact your Eligible Installer!

The Installer submits a request for payment of the incentive amount. Once the Solar Thermal system has been installed and you receive written approvals from all appropriate jurisdictions that the system has met their requirements, the Eligible Installer can then request payment of the incentive by NYSERDA

If you have any questions regarding the program or an application, you can e-mail NYSERDA at STInquiries@nyserda.ny.gov. In the subject line please reference the Solar Thermal Incentive Program.