

Attachment A

RENEWABLE HEAT NY BIOMASS BOILER PROGRAM

Customer Step-by-Step Guide

Find an Eligible Installer/Contractor to learn about installation options and requirements. Only a NYSERDA Eligible Installer/Contractor may apply for incentives and assist with customer financing through the Program. A list of Eligible Installers and Contractors is available on NYSERDA's website at <http://www.nysERda.ny.gov/renewableheatny>.

Available Financing

- **Residential Customers**

May be eligible to finance the purchase and installation of their biomass boiler system through NYSERDA's low-interest financing options. The first option is the On-Bill Recovery Loan. With this loan option, your monthly payments may not exceed your estimated average monthly energy cost savings. Your loan payments are built right into your utility bill so you will not have an extra bill each month. Your energy savings essentially pay for your work. The other loan option is available through the Green Jobs/Green New York (GJGNY) Program. Residential customers may apply for GJGNY financing online or download an application at www.energyfinancesolutions.com. The GJGNY financing is available for residential biomass boiler systems installed on **existing homes of four units or less**.

- **Small Commercial Customers**

May be eligible to finance their biomass boiler system through low-interest small commercial financing offered through GJGNY. NYSERDA will review the Project Application to determine the project's eligibility for financing and will notify the customer of the status (approved/denied). Customers whose Renewable Heat NY project has been approved for financing can then take the NYSERDA approval letter to a participating lender to apply for financing. For more information on NYSERDA's low-interest loan options for small business and not-for-profit customers, including the forms and list of participating lenders, visit: www.nysERda.ny.gov/small-commercial-financing.

Ask the Eligible Installer/Contractor questions such as the following:

- *How many hydronic heating systems have you installed? How many projects similar to my proposed project have you completed in the last year?*
- *What is the estimated price range for an eligible biomass boiler and thermal storage system when installed with my existing hydronic distribution system?*
- *Will my project require a building permit? If yes, will you be responsible for obtaining the permit? (You may want to choose a contractor familiar with the permitting process in your county, city, or town.)*
- *Will my system need to be approved by the local code official?*
- *What other approvals are required in my municipality?*
- *May I have a list of references? (Participating Installers/Contractors have provided NYSERDA with customer references including names, addresses, and phone numbers. Ask each client how long ago the project was and whether it was completed on time. Was the client satisfied? Were there any unexpected costs? Did workers show up on time and clean up after finishing the job)*
- *What types of insurance do you carry (Participating Installers/Contractors must have general liability and worker's compensation insurance)?*

Check with your Municipality and Local Code Official to learn more about the requirements for a installing a high-efficiency biomass boiler 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 a written agreement with your Participating Installer/Contractor.

Apply to the Program

Once you have decided to install a biomass boiler system and have chosen an **Eligible Installer/Contractor, they will provide you with the following documents:**

- **Project Application (Attachment B).** The Eligible Installer /Contractor must submit the Project Application package to NYSERDA. Consider asking Eligible Installer/ Contractor for a copy of the package for your records.
- **Incentive Payment Request Form (Attachment C).** The Eligible Installer /Contractor must submit the Incentive Payment Request Form to NYSERDA. The incentive will be paid directly to the Installer/Contractor at the completion of the installation and acceptance by NYSERDA. By signing the Incentive Payment Request Form (Attachment C), the customer is confirming receipt of the System's Operation and Maintenance Manual and agrees to allow NYSERDA to use pictures of their System for any Marketing Materials or promotion of the Program.
- **Customer Agreement.** The contract is between you and the Participating Installer/Contractor for the installation of a qualified biomass boiler system. The Customer Agreement should include details such as system costs, installation and payment schedules, responsibilities related to all permitting, warranty/maintenance plan, and other required approvals, etc. The documents clearly identify everything the Eligible Installer/Contractor will provide with respect to the installation. The Agreement must clearly apply the full amount of the NYSERDA incentive toward the price of the system.
- **Addendum to the Customer Purchase Agreement (Attachment D).** This Addendum must be signed by both the Customer and the Installer/Contractor and submitted to NYSERDA with your Project Application. The Addendum to the Customer Purchase Agreement includes provisions designed to protect you. The eligibility of your system will depend on the Eligible Installer/Contractor adherence to the terms of the Addendum.
- **Recycling Form (Attachment E).** The Eligible Installer/Contractor must submit the Recycling Form to NYSERDA for approval. The Recycling Form is required for projects retiring an outdoor wood boiler (OWB), indoor wood boiler (IWB) (\$5,000) or wood furnace (\$2,500) that is replaced by an approved advanced cordwood or pellet boiler heating system for an incentive. The recycling incentive will be paid directly to the eligible Installer/Contractor.
- **System Design and Approval Report.** The Eligible Installer/Contractor will receive a report from NYSERDA that outlines the approved design and schematics of the system and gives formal approval for the project installation to begin. This report should be shared with the customer.

NYSERDA's **REVIEW OF THE PROJECT APPLICATION** includes the following:

Review for Completeness and compliance: If a Project Application package is not complete or if it presents issues of non-compliance, NYSERDA will notify the Eligible Installer/Contractor and request additional information or clarification. Project Applications must include a detailed design schematic or drawing of the systems and its related components. The drawings do not have to be in CAD software and hand-drawn schematics will be accepted, but drawings must label each piece of equipment and show the direction of the supply and return flow of the hydronics. An application will be denied after three (3) unsuccessful requests to the Eligible Installer/Contractor for missing or inaccurate application documents. If an application is denied, Eligible Installer/Contractor will be notified that they may re-apply. After NYSERDA has received all requested information, the application will be reviewed.

Approval Notification: The Eligible Installer/Contractor will be notified directly of the approval or denial of each application package. Notices of approval will specify the amount of the incentive and the timeframe within which the system must be installed. Notices of denial will detail deficiencies in the application, allowing you and Eligible Installer/Contractor to make corrections and re-submit an application. Eligible Installers/Contractors who proceed with construction prior to submittal of a project to NYSERDA do so at their own financial risk. It is the responsibility of the Eligible Installer/Contractor to notify their customer of the status of their project application. NYSERDA does not notify customers. If the number of applications exceeds available funding, project applications will be placed on a funding waitlist in the order they have been submitted to the Program. The placing of a project application onto the waitlist does not constitute an entitlement to an incentive.

Complete project within 120 days of NYSERDA approval.

All projects must be complete within 120 days from the date of NYSERDA approval. It is important that you, the customer, keep track of this deadline, as the eligibility of your System for incentive payments depends on meeting the required timeline. Project Extensions may be granted, upon written request, on a case-by-case basis, if there are legitimate and verifiable issues or delays related to new construction or equipment availability. Project extensions may be granted in 90-day increments. If the installation of your System is not progressing according to schedule, contact your Eligible Installer and/or Contractor.

If you have any questions regarding an application or the program, e-mail NYSERDA at RHNY@nyserdera.ny.gov. In the subject line please reference the RHNY Biomass Boiler Program.