## Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Details</th>
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<tr>
<td>1.0</td>
<td>2019-04-24</td>
<td>N. Graziade</td>
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Introduction

This document is designed for contractors who wish to participate in NYSERDA’s Retail Energy Storage Incentive Program (RESIP).

Please be aware that all applications are submitted through NYSERDA’s Salesforce Portal, and this document only addresses Salesforce procedures. See any additional RESIP program documentation for policy information.

**Note:** Screenshots always follow text. They are placed *after* the corresponding instructions.

Background

The Retail Energy Storage Incentive Program provides cost buy-downs for financial support for new grid-connected energy storage systems that are up to five megawatts (MW) of alternating current (AC) power and are either interconnected behind a customer’s electric meter or directly into the distribution system. Primary applicants are the developers/integrators of the energy storage systems.

RESIP Topic Timeline

<table>
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<th>Inclusion Date*</th>
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<tr>
<td>April 2019</td>
<td>Contractor Application Submission</td>
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<td>Request for a payee assignment after project approval</td>
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<td>May 2019</td>
<td>Request for a full assignment after project approval</td>
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<td>May 2019</td>
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Navigating Salesforce

The navigation functions in Salesforce are identical in the contractor and project applications.

When you are ready to proceed after completing a step, click “CONTINUE” in the bottom right corner of the page. If you need to return to a previous page, click “PREVIOUS” in the bottom left corner.

Each page of the application will display a “breadcrumb” path that shows your progress. It shows completed pages (1), the current page (2), and any upcoming pages (3).
Note that you can log out during the application process and return to complete it later. The NYSERDA Portal will save your progress.

**Submitting Contractor Applications**

To participate in the Retail Energy Storage Incentive Program, you must become an *approved participating contractor*. To become approved, navigate to the [Portal Registration](#) page and complete steps 1 through 5 to complete the Contractor Application.

**Step 1**

Click the “Program Family” dropdown list and select Energy Storage.

Click “CONTINUE” to proceed.
Step 2

Enter your business information on the “Company Information” page.

Note: A red asterisk (*) next to a field name indicates that it is a required field.

Scroll down the page to enter the following details:

- **What kind of business do you have?**: Click to open a picklist menu and select *all* options that apply (e.g., Corporation, LLC, etc.).

- **MBE, WBE, or Service-Disabled Veteran-Owned Businesses**: Check the checkbox for any of the statuses that apply to your business (Minority-Owned Business Enterprise, Woman-Owned Business Enterprise, or Service-Disabled Veteran-Owned Business). When you click any checkbox, the screen expands to reveal an additional field to enter the relevant ID.

- **Tax Identification Type**: Click the radio button to use your Employer Identification Number (EIN) and enter the ID in the provided field.
When ready, click “CONTINUE” to proceed.

**Step 3**

The “Contact Information” page collects details about your company’s contacts. Enter details for the following:

- Primary Contact
- Accounts Receivable Contact
- Authorized Signatory Contact

Click “ADD A CONTACT” to add a new contact.
The “Add a Contact” window opens. Enter the contact details in the provided fields.

Click “SAVE CHANGES” to add the contact.

If one contact fulfills multiple roles, click “Clone” in the “Action” column. This will open a new “Add a Contact” window that is prepopulated with the same information.
Click the “Contact Role” dropdown list to select a new role (e.g., Accounts Receivable or Authorized Signatory) and save your entry.

**Note:** You must add a contact for each contract role. The same person can fulfill all roles.

When ready, click “CONTINUE” to proceed.

**Step 4**

The “Documents” page lets you upload all required documents.

Click “Choose File” to open a new Explorer/Finder window.

Navigate to the document’s location, select it, and click “Open.” The document name will display in the “Add/Update Document” column.
To add additional documents in the “Other Documents” section, click “ADD ANOTHER DOCUMENT” to create a new table row. As before, enter a document name and upload the document using the steps above.

If you need to log out, click “SAVE” to save your progress. When ready to proceed, click “CONTINUE.” This automatically saves your documents.

**Step 5**

Scroll down to answer the Certification Statements.

Continue and carefully read the conditions for participation (click the link to open the terms and conditions).
When ready, scroll to the bottom of the page. Check the checkbox to agree to the terms and conditions (1) and click “ELECTRONIC SIGNATURE” (2) to open a DocuSign form for your electronic signature.

On the DocuSign Page, confirm that you agree to use the electronic signature (1) and click “CONTINUE” (2).

Review the application. When ready, scroll to the bottom of the page and click “Sign.” This opens a new window.
Your name and initials will automatically populate the “Adopt Your Signature” page. Click “ADOPT AND SIGN” to add your signature to the application.

Click “FINISH” at the bottom of the page to add your signature. The system automatically adds the signature date and the signed document to your application.
Click “SUBMIT” to finish. You will receive the confirmation message below:

```
Your application has been submitted successfully. Your application number is 14944.
```

Additionally, you will receive an email notification similar to the one below:

```
Retail Storage Incentive Program Contractor Application #14944 - Received
Dear Angela Corelli,
Ref. Application #14944
Thank you for submitting an application to become a NYSERDA Retail Storage Incentive Program Participating Contractor. Your application is under review, and you will be notified of its status and next steps or rejection within ten business days from the date of this email.

Please note your application is still in the review status and this email does not commit NYSERDA to approving you as a Retail Storage Incentive Program-Participating Contractor.

If you have any questions, please feel free to contact energystorage@nysrda.ny.gov or mainstorage@nysrda.ny.gov

Thank you,
The NYSERDA Retail Storage Incentive Program Team

Please do not reply to this email as this inbox is not monitored.

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 advise the sender.
```

### Setting Up Portal Access

Upon completion of the Contractor Application, you will receive an email from the NYSERDA Portal. Click the hyperlink in the message to open the “Change Your Password” page.

```
Welcome to the NYSERDA Salesforce Portal

NYSERDA Portal salesforcesupport@nysrda.ny.gov via okmwa3nc23yvq.r-zueqaa
3:03 PM (5 minutes ago)

Hi Angela Corelli,
Welcome to the NYSERDA application portal! Your account has been created.

Your username is: angela@test.com.nysrda

To get started, create a password at https://portal.nysrda.ny.gov/login?ahcdetfg1234567890ABCDEFG

Please contact SalesforceSupport@nysrda.ny.gov if you have trouble logging in.

Thank You,
NYSERDA
```

On the “Change Your Password” page, enter a password in the “New Password” field. The password must use at least:

- 15 characters
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character (e.g., $ or &)

The page displays a checkbox confirmation when the password meets each requirement.
After you have created a password, re-enter it in the “Confirm New Password.” The system indicates mismatched entries.

**Note:** The password must meet all criteria above, and you must confirm your password before it is possible to proceed.

When the passwords match, click “Change Password” to finish and open the home page for the NYSERDA Portal.

**Submitting Project Applications**

When a participating contractor submits an application, the record status automatically changes to “Submitted.” This creates an email notification (with a link to the application) to NYSERDA Program staff and/or Shared Services.

All Contractor Applications have “Retail Storage Incentive Application as their record type.”

**Beginning Your Application**

Log in to the NYSERDA Portal and click the “Submit a New Application” tab. Next, click the “Retail Energy Storage Incentive Program” tile.
Step 1

Review your business information on the “Company Information” page. This information will automatically populate from the information in NYSERDA’s database.

Click “CONTINUE” to proceed.
Step 2

Enter the Contractor and Site Owner on the “Project Contacts” page. By default, the “Contractor” details automatically populate from your NYSERDA Portal account.

Click “ADD A CONTACT” to open the entry window.

Enter the following details in the “Add a Contact” window:

- First Name
- Last Name
- Contact Role
- Primary (checkbox to designate a primary contact)
- Company Name
- Title
- Email
- Phone
- Address
- City
- Zip Code
- State

Click “SAVE CHANGES” to add the contact.
You must add a Contractor contact. If available, you may also add contacts for each of the following contact roles: Customer, Developer, Installer, Payee, and Integrator.

Click “CONTINUE” to proceed.

**Step 3**

Enter the Project Site details on the “Site Information” page.

Click “ADD A SITE” to open the entry window.

Enter the following details in the “Add New Project Site” window:

- Address
- City
- State (defaults to New York)
- City
- County

When ready, click “SAVE CHANGES” to finish and add the site to the Site Information table.

Click “CONTINUE” to proceed.
Step 4

Enter the project details on the “Project Information” page. You can save your details at any time by clicking “SAVE ALL” at the bottom of the page.

Click the “Summary,” “Project Site,” and “Storage System Component” headings to expand the corresponding section and enter details.

Enter the Energy Storage System cost in the “Summary” section.

Each site will have a unique dropdown under the “Project Site” section. Enter information about the site’s utilities, classification, tariff details, and program details for each site.
Enter information about the storage system in the “Storage System Components” section.

Click “CONTINUE” to proceed.
Step 5

The “Documents” page lets you upload all required documents.

Click “Choose File” to open a new Explorer/Finder window.

Navigate to the document’s location, select it, and click “Open.” The document name will display in the “Add/Update Document” column.

If you need to upload a supporting document, enter the document name and click “Choose File.”
To add additional documents in the “Other Documents” section, click “ADD ANOTHER DOCUMENT” to create a new table row. As before, enter a document name and upload the document using the steps above.

If you need to log out, click “SAVE” to save your progress. When ready to proceed, click “CONTINUE.” This automatically saves your documents.

**Step 6**

Review all project details on the “Application Review” page. If you need to update any information, click “PREVIOUS” to return to the previous page or click the corresponding “breadcrumb” at the top of the page. Click “PRINT” to print a copy or “CONTINUE” to proceed.

Continue and carefully read the Certification Statement.
When ready, scroll to the bottom of the page. Check the checkbox to agree to the terms and conditions and click “ELECTRONIC SIGNATURE” to open a DocuSign form for your electronic signature.

Follow these directions from Section 3 to proceed through the DocuSign Process

When ready, click “SUBMIT” to submit your application.