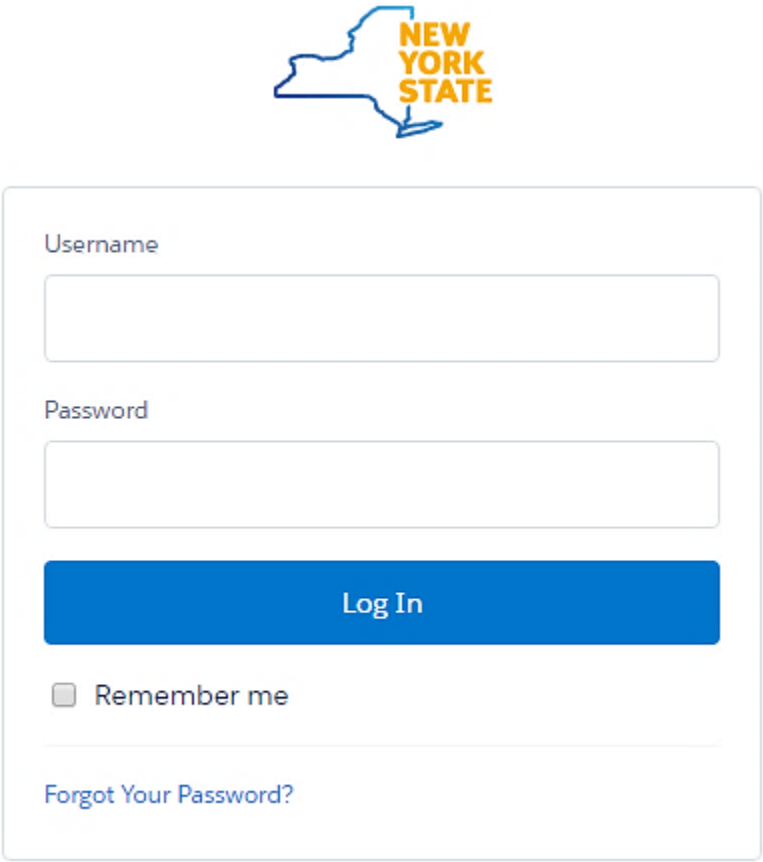
Commercial & Industrial Payee Assignment Reference Guide

Welcome to the NYSERDA Commercial & Industrial Payee Assignment Reference Guide. This document includes step-by-step instructions on how to complete and submit a change modification.

1. Login to your portal at nyserda-portal.force.com/login.

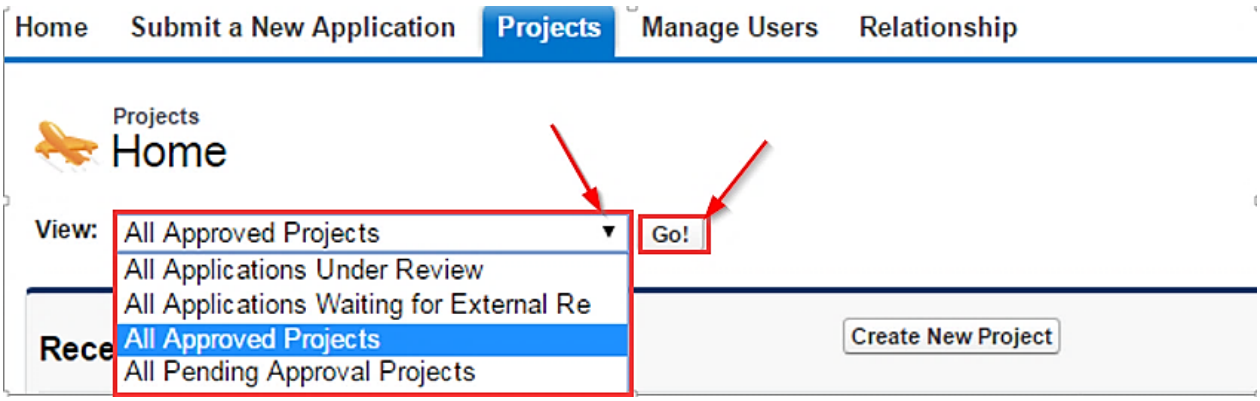


2. Click on the 'Projects' tab.

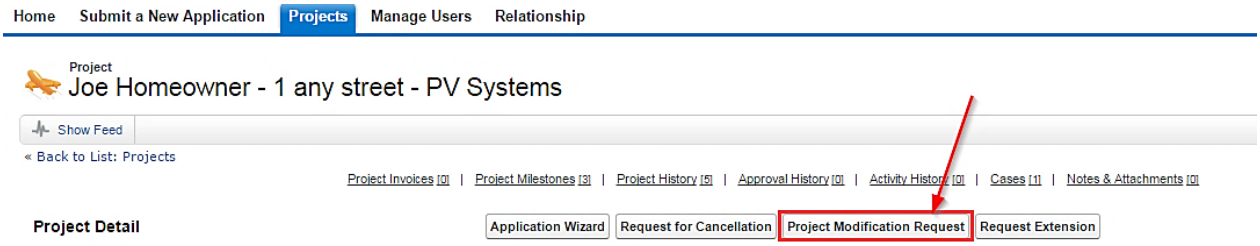
3. Search for the project you wish to submit a change modification for by using either the 'Search' feature or 'All Approved Projects' in your list view.

a. Search

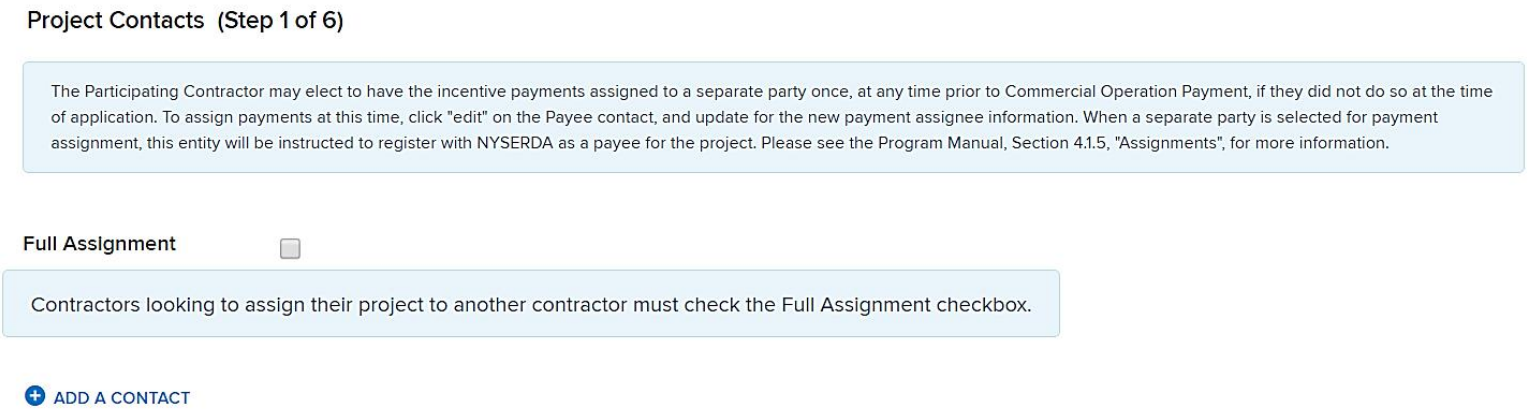
b. List View



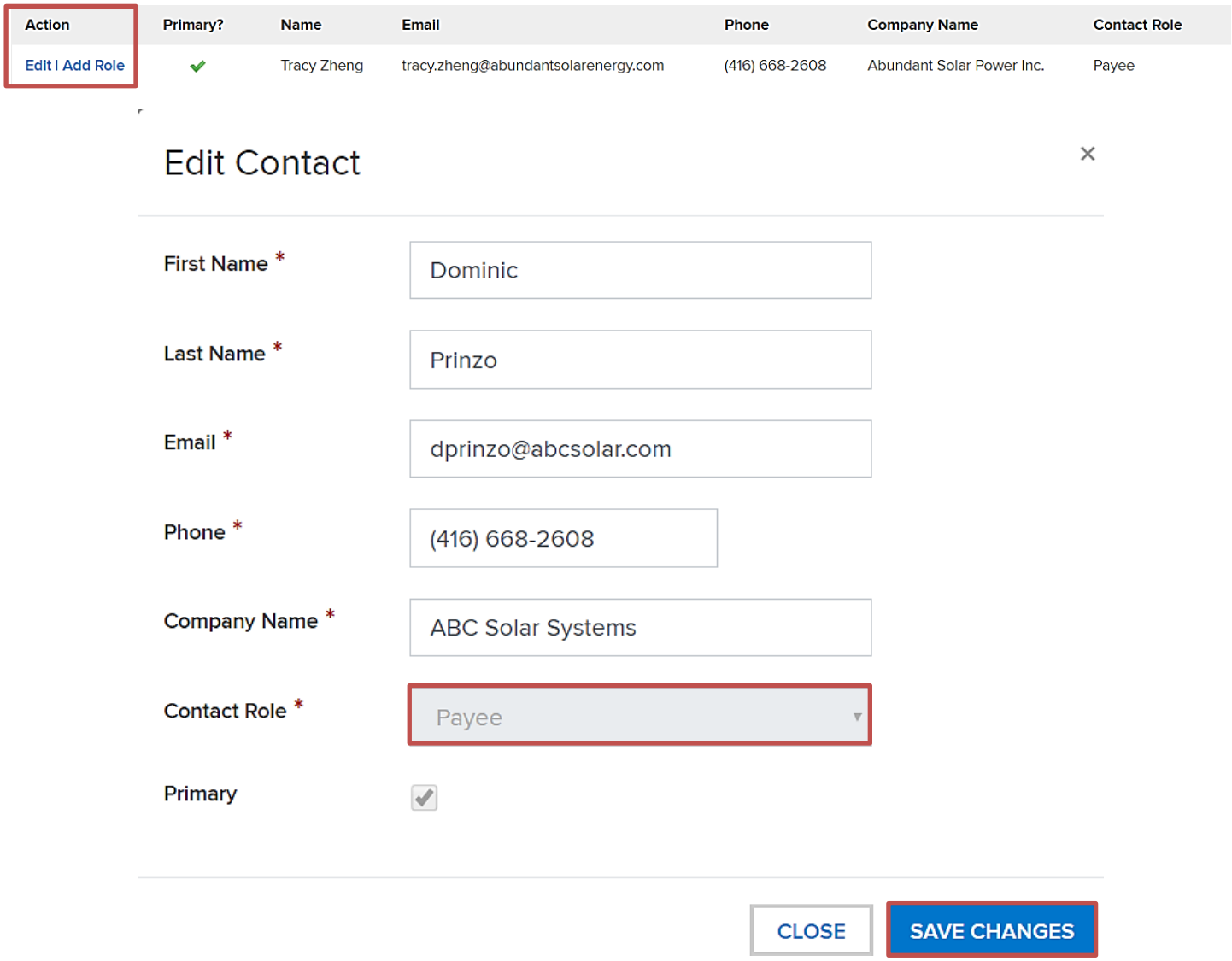
4. After finding the project, click on ‘Project Modification Request’ on the project record.



5. This will bring up a wizard like the Incentive Application for you to add/edit a payee and perform a full assignment.



6. Follow the instructions below to either add **(a)** or edit **(b)** your payee.
    a. If you would like to change the payee from the contractor to a different entity click the "add a contact" button and proceed to fill out your payee's information. Select payee in the contractor role dropdown, when you are finished click save changes.
    b. If you would like to edit your current payee as part of a full assignment you must contact NYSERDA first. NYSERDA will enable the edit option which will allow you to update your payee's information. When you are finished click save changes.



7. If you are looking to assign your project to a different contractor, check the “full assignment” checkbox and enter the new contractor’s company name.

Full Assignment ☑

Contractors looking to assign their project to another contractor must check the Full Assignment checkbox.

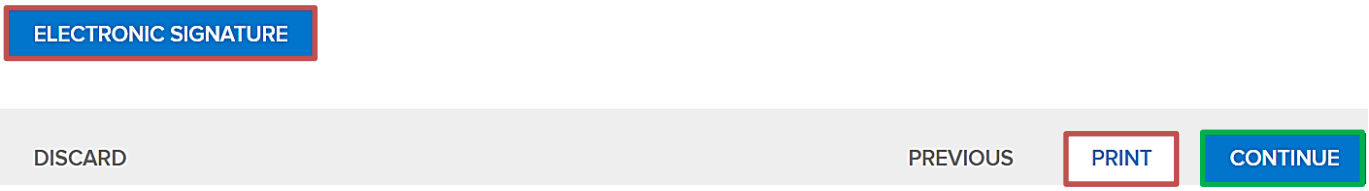
New Contractor's Company Name: * ABC Solar Systems

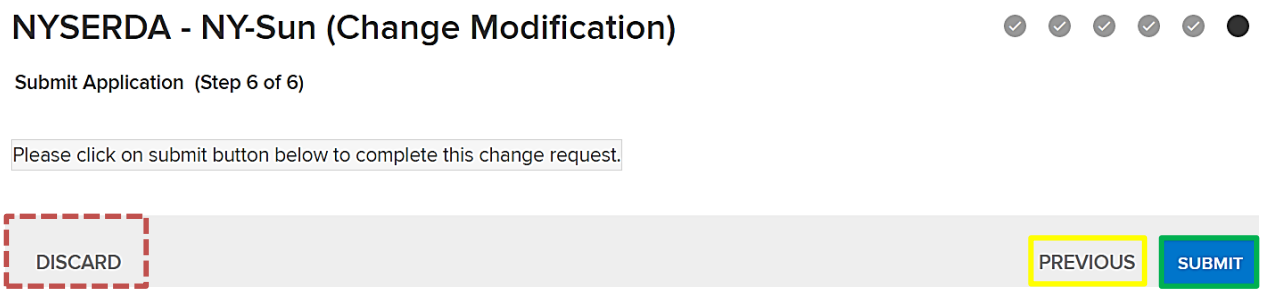
8. When you review your application look at the project participants section to confirm all your changes/additions were saved.
    a. If you edited your payee or fully assigned your project, the original payee information will be shown with a grey ~~strikethrough~~. Your updated information will be shown to the right, please make sure it is correct.
    b. If you assigned your project the new contractor’s name should be shown under the updated column for New Contractor’s Company Name.

Project Participants

	Original	Updated
Contractor Name	-	Tracy Zheng
Contractor Company Name	-	Abundant Solar Power Inc.
a Payee Name	~~Tracy Zheng~~	Dominic Prinzo
Payee Company Name	~~Abundant Solar Power Inc.~~	ABC Solar Systems
Customer/Sponser Name	-	Richard Lu
Customer/Sponsor Company Name	-	Abundant Solar Power Inc.
I will be requesting full assignment of this project to a new contractor		✓
b New Contractor's Company Name		ABC Solar Systems

9. Scroll down the page to provide your signature. Providing signature attests that you agree to the language at the bottom of the screen. Please be sure to read this language prior to signing. Electronic signature will only go to the customer, ensure that any changes are reviewed and signed off on by all parties. You may also choose to print and send a hard copy of your changes to all parties for signature. Click on continue once you are finished.



10. Upload any required documents. If applicable, upload the full assignment form stating that you have assigned your project to a different contractor. Once all required documents are uploaded continue to the next step to submit your application and complete the process.

11. **Do not** hit the discard button, this will delete your application and force you to start over. If you wish to make changes click the previous button to take you back to prior steps.