NYSERDA Portal (Salesforce) FAQs for NY-Sun Contractors

Program Changes & Training

1. Is the NY-Sun Program moving away from PowerClerk?
   a. Yes, the NY-Sun Program will no longer use PowerClerk as of 8/31/16. The new NYSERDA Portal (Salesforce) will launch on 9/8/16.
2. Will my 4-digit Installer ID transfer to the new NYSERDA Portal?
   a. No, the 4-digit Installer ID will not be used in the new NYSERDA Portal. Instead, companies will be approved to participate in the Program as a Contractor, Builder, or Both (Contractor and Builder). Companies can then form relationships between each other prior to project application submittal.
3. Are Incentive Requests now being referred to as invoices? Are change orders being referred to as something different? Are there other changes to the terminology?
   a. Yes, there are several changes in terminology, including:

PowerClerk (OLD)	NYSERDA Portal (Salesforce)
Incentive Request Form	Project Invoice Request
Change order form	Project Modification Request
Cancellation form	Cancellation Request
Extension form	Extension Request

4. If you were not able to participate in the training webinars, is there another opportunity to train?
   a. We will not conduct additional training webinars, but you may view a recording of the training webinar on the Salesforce Training and Resources section of the NY-Sun website. In addition, we have provided step-by-step guides for each stage of the project application, which are also available on the NY-Sun website. http://www.nyserda.ny.gov/All-Programs/Programs/NY-Sun/Project-Developers/Salesforce-Training-and-Resources

NYSERDA Portal Access

1. What if I forgot my username?
   a. E-mail pvprocessing@nyserda.ny.gov
2. What if I forgot my password?
   a. Go to the user Portal and click on the “Forgot Your Password?” link at the bottom of the page. You will need to know your Portal username.
3. How do I add other users from my organization?
   a. Once logged into the Portal, click on the Manage Users menu. Then click on New User and follow the steps.
4. Is the NYSERDA Portal (Salesforce) down?
   a. Visit the Portal status dashboard: http://trust.salesforce.com/trust/instances/NA30
   b. Your issue may be related to your browser or PC. If you are unsure, please restart your browser or PC.
5. What if I already have a Salesforce account?
   a. Your existing account will not allow you to log into the NYSERDA Portal.
   b. If you are unable to use your email address to create an account, a NYSERDA administrator will need to create a specific Portal login for you.
6. We are having issues signing into Sandbox. We have tried the "forgot your password" option, but it doesn't email us.
   a. Email pvprocessing@nyserda.ny.gov and our group can force a reset
7. How do we get to the Sandbox / project applications area you are talking about?

    a. You must be a currently approved Contractor and/or Builder with the NY-Sun Program
    b. If you have your username and password, access the Sandbox at this link: https://uat-nyserda-portal.cs22.force.com/login
8. What is the purpose of a user? Is it to allow different people at the company to fill out the NYSERDA application?
    a. That is correct. Each person at the company should have their own account. Moving forward, we are discouraging sharing accounts.
9. Can more than one user have "admin" access to the Portal?
    a. Yes, more than one user can have “admin” access to the Portal.
10. Will Contractor/Builders who are currently using Salesforce be able to link their customer data to the NYSERDA Portal?
    a. This functionality is not currently available, but we are considering it for the future.

Browser Behavior

1. It looks like I lost my project application. What are my options?
    a. Visit the Project tab and filter by status.
    b. Search by customer name or application number.
2. I closed my browser before I finished my application. Do I have to start over?
    a. Applications are saved at a page level. You can always retrieve your “Unsubmitted” applications by going to the Project tab and selecting the Unsubmitted filter option.

Contractor/Builder Relationship

1. What is the Contractor / Builder relationship?
    a. The Contractor/Builder Relationship applies to participation in the Residential/Small Commercial Program only. The Updated Contractor/Builder PDF presentation provides further explanation.
2. How do I request a relationship?
    a. Log in to the Portal
    b. Click the Relationship tab
    c. Click the blue “Add Request” link on the right-hand side of the page
    d. In the Company Name field, begin typing the company you would like to partner with. You must select that company name from the drop-down list.
    e. Add any notes as necessary
    f. Electronically sign the agreement.
    g. The Agreement will then be emailed automatically to the company you are requesting to partner with. Once the Agreement is countersigned, the relationship will be considered Approved.
3. How do I reject a relationship?
    a. In the Relationship tab, change the Filter By Status to “Pending My Approval”
    b. Find the appropriate Company Name and click the blue “Reject” link
4. How do I cancel a relationship?
    a. In the Relationship tab, change the Filter By Status to “Approved”
    b. Find the appropriate Company Name and click the blue “Cancel” link

5. Will I lose project visibility if I lose a relationship?
    a. No, you will always be able to see project applications where you were either a Contractor or Builder.
6. When requesting a new relationship, what do we enter in the Company Name textbox?
    a. You will need to know the name of the company with which you’d like to partner.

7. If my company is approved as both a Contractor and Builder, do I need to establish a relationship?
    a. You will only need to establish a relationship if you would like to enter a partnership with another company. You may submit project applications listing your company as both the Contractor and Builder.
8. If I'm approved to participate in the Commercial/Industrial Program, do I need to become approved as a Builder?
    a. No, the C/I Program is Contractor-based. The Builder designation applies to the Residential/Small Commercial Program only.

System Design Questions

1. How is the CEC list being updated?
    a. Our NYSERDA System Admin is responsible for updating the list every month.
2. Are we no longer required to submit a PVWatts report with the shade report?
    a. The PVWatts calculation has now been built into the NYSERDA Portal, so it is no longer necessary to perform and upload a separate calculation of the PV system's expected annual production (either with PVWatts or a similar industry-accepted tool).
3. Where do we pull the numbers for the historical annual energy consumption? The shading report?
    a. Information on a customer's historic annual energy consumption should be taken from their electric bill. When this is not available, such as for new construction sites, you will need to perform a load calculation. Please see Section 5.6 of the Residential/Small Commercial Program Manual for more details.
    b. Please see Section 5.5 in the Residential/Small Commercial Program Manual for information about the shading report requirements.
4. Does both the Contractor and Builder get notified if additional information is needed as a result of the design review?
    a. Yes, both the Contractor and Builder are notified if Program Staff requests clarification or additional information.

General Project Application Questions

1. What happened to my data from PowerClerk?
    a. All project applications that have a status of Submitted and beyond will be migrated to the NYSERDA Portal.
    b. Projects that have a status of Unsubmitted will not be migrated to the NYSERDA Portal.
2. Will additional guidance documents be made available?
    a. Yes, detailed step-by-step guides are available for each stage of the project application lifecycle. Those guides are available on the NY-Sun website: http://www.nyserda.ny.gov/All-Programs/Programs/NY-Sun/Project-Developers/Salesforce-Training-and-Resources
3. If we are submitting an application we started in PowerClerk for which we are getting the customer signature, can we still submit to PowerClerk today?
    a. Yes, you may submit new project applications into PowerClerk until 8/31 at 5pm. When the NYSERDA Portal launches, you may submit the old version of the project application only if the customer has signed it prior to the transition to the new Portal.

4. Will we have the option to send through our own DocuSign account?
    a. No, a DocuSign account has been set up for the NYSERDA Portal and all Contractors/Builders must use that account to send out documents for electronic signature. Contractors will also have the ability to print program documents in order for the customer to provide a hard-copy signature.

5. How will project modification requests (change orders) be submitted in this new process?
    a. The project modification process has been built into the NYSERDA Portal. The Contractor or Builder will have the ability to input any changes into the system. Please use the step-by-step Project Modification Request guide on the NY-Sun website.
6. Will the project modification request (change request) and project invoice request (incentive request form) change after the NYSERDA Portal launch?
    a. The required information for all requests will remain the same. However, the process for submitting these requests will be done within the NYSERDA Portal. Upon launch, you will be required to submit project modification requests and project invoices directly into the NYSERDA Portal. You will not be allowed to submit these forms to the email inboxes.

Residential/Small Commercial <200kW Specific Questions

7. Can I submit paperwork that has already been signed by the customer?
    a. Program documents that have been signed by the customer prior to the launch may be submitted in the NYSERDA Portal until 30 days after launch. After this date, you must use the current version of all Program documents.
8. Is the customer required to sign the final invoice? I didn't see anything about that in the first webinar presentation.
    a. Yes, all invoices must be signed by the customer. The DocuSign functionality is the preferred method to obtain customer signatures. However, you will also be able to print the invoice for the customer to provide a hard-copy signature.
9. Do the forms no longer need customer signatures?
    a. All project applications and all invoices will require a customer signature, including project modification requests that result in a changed incentive amount. .
10. Are there any changes to the GJGNY loan service?
    a. For projects using GJGNY financing only (no incentive), you must submit the project invoice request in order to complete the project, and for EFS to release the loan.
    b. For projects using GJGNY financing AND receiving an incentive, you must submit the project invoice request in order to complete the project, and for EFS to release the loan.
        i. In order to have the loan released prior to receiving the final interconnection letter from the utility, you must submit the Request for Release of Loan Form signed by the customer, and provide the electrical inspection certificate to PVForms@nyserda.ny.gov OR PVFormsLI@pseg.com.
11. What is the maximum number of unsubmitted applications? Is there a limit?
    a. There is no limit for the number of unsubmitted applications in the NYSERDA Portal.
12. Do you need to upload the usual documents to the project invoice request?
    a. Yes, the documents for each project invoice request will remain the same.
13. Can you still submit 75/25% project invoice requests? Or just 100% at the end of the project?
    a. Yes, you can still request either 75%/25% or 100% once a project has been approved. NY-Sun staff encourages use of the 100% project invoice request whenever possible.

Commercial/Industrial >200kW Specific Questions

1. We typically sell our projects to buyers who then receive the incentive payments, rather than our firm receiving them. What do our buyers need to do in order to get set up in the system to submit invoices and receive payments?
    a. For projects submitted to the Residential/Small Commercial Program, incentives are paid directly to the Participating Contractor. For projects submitted to the C/I Program, incentives are paid to the Participating Contractor OR you may elect to have the incentive payments assigned to a Payee once per incentive application, either at the time of application

submission, or prior to invoicing, through a Project modification request. Once the Contractor defines the Payee, the Payee will receive an email with a link to the Payee Registration Form. Once completed, the Payee would then be set-up as a vendor in the system to receive incentive payments. If a Contractor does not wish to assign payments at the time of application, they should add the “Payee” role to their contact info on the project contacts page.

2. If we don't enter a payee, is the payment defaulted to the contractor? Also, the only party the contractor could assign payment to would be the customer, right?
   a. You must enter a Payee at the time a project application is submitted. If you do not wish to formally assign payments at this time (you want payments to go to you, the Contractor), you must add the Payee role to the Contractor contact. You may formally assign payments to another entity at a later time through a Project Modification Request. Assigning payments to a separate entity can be done only once.
      The Contractor can assign payment to any entity deemed appropriate, but they may only elect to do so once per incentive application- either at the time of application submission, or prior to invoicing via a Project modification request.
3. We will need to provide three contacts in the first screen, right? One each for Customer, Contractor, and Payee?
   a. Yes, the Contractor contact will be automatically populated, but you will need to provide at least one Customer and at least one Payee. If you do not want to formally assign payments to another entity at this time, you will need to “Add role” to the contractor contact and select Payee. It is not a formal payment assignment unless you select a different Company Entity as Payee.
4. For approved projects, can I add Payees as soon as the NYSERDA Portal has launched?
   a. You may assign payments at the time of application submission, or before the first invoice via a Project Modification Request. You cannot assign payments after the first commercial operation payment has been approved, and you cannot assign payments more than once.

<u>Quality Assurance Questions</u>

1. Are both the Contractor and Builder notified if a corrective action response is sent as a result of a failed QA inspection?
   a. Yes, both the Contractor and Builder are notified if the QA Staff requests corrective action.