

# Residential and Retail Energy Storage Incentive Programs

## User Guide

For Residential Contractors and Builders

June 2025



**NYSERDA**  
New York State Energy Research  
and Development Authority

## Revision History

Version	Date	Details
1.0	2019-04-24	Initial release
2.0	2025-06-03	Updated for new Residential and Retail Energy Storage Market Acceleration Incentive Programs

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## Introduction

This document is designed for contractors participating in NYSERDA’s Residential and Retail Energy Storage Market Acceleration Incentive Programs.

All online applications are submitted through NYSERDA’s Salesforce Portal, and this document only addresses Salesforce procedures.

See the [Residential and Retail Energy Storage Market Acceleration Incentives Program Manual](#) for rules and requirements.

**Note:** Screenshots are placed *after* the corresponding instructions.

## 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. The path shows completed pages (1), the current page (2), and any upcoming pages (3).

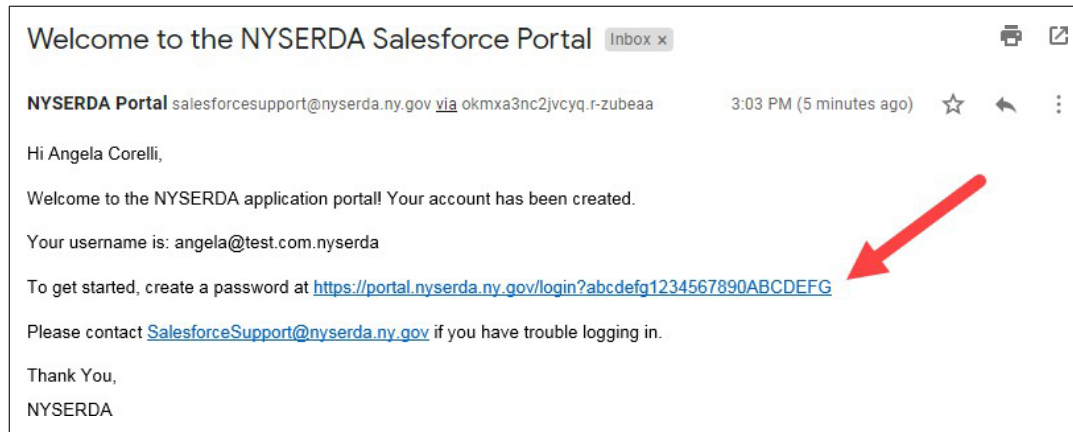


Note that you can log out during the application process and return to complete it later. The NYSERDA Portal will save your progress.

## 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.



- On the “Change Your Password” page, enter a password in the “New Password” field. The password must have 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.

Enter a new password for **angela@test.com**. Your password must have at least:

- ✓ 15 characters
- ✓ 1 uppercase letter
- ✓ 1 lowercase letter
- ✓ 1 number
- ✓ 1 special character ⓘ

\* New Password

..... Good

\* Confirm New Password

..... Passwords don't match

Change Password

Enter a new password for **angela@test.com**. Your password must have at least:

- ✓ 15 characters
- ✓ 1 uppercase letter
- ✓ 1 lowercase letter
- ✓ 1 number
- ✓ 1 special character ⓘ

\* New Password


..... Good

\* Confirm New Password

..... Match

Change Password

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



Angela Corelli ▾

[Home](#)
[Submit a New Application](#)
[Projects](#)
[Project Invoices](#)
[Manage Users](#)
[Dashboards](#)

## Setting Up Builder-Contractor Relationships

To request a new builder or contactor relationship:

- Log into the NYSERDA Portal.
- Open the Relationship tab.

[Home](#)
[Submit a New Application](#)
[Projects](#)
[Project Invoices](#)
[Manage Users](#)
[Relationship](#)
[Project Inspections](#)
[Dashboards](#)
[Generate Campaign](#)

Select Language ▾  
Powered by Google Translate

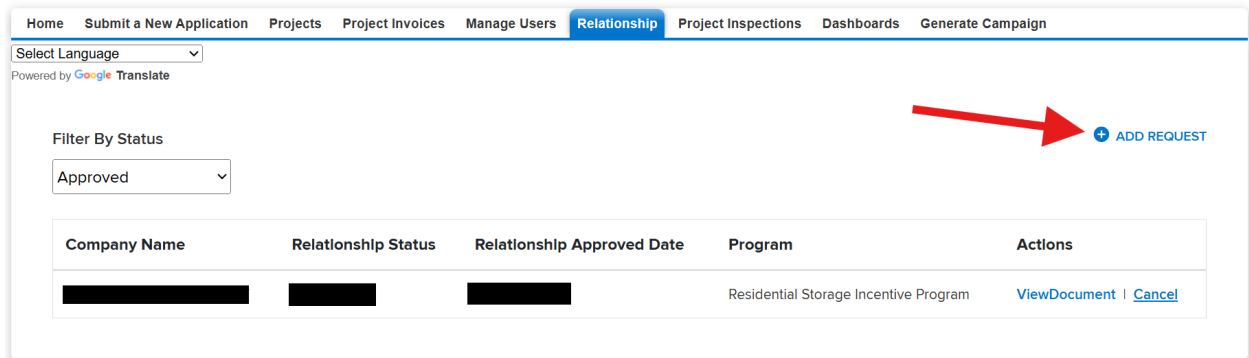
Filter By Status  
Approved ▾

+ ADD REQUEST

Company Name	Relationship Status	Relationship Approved Date	Program	Actions
██████████	██████████	██████████	Residential Storage Incentive Program	<a href="#">ViewDocument</a>   <a href="#">Cancel</a>

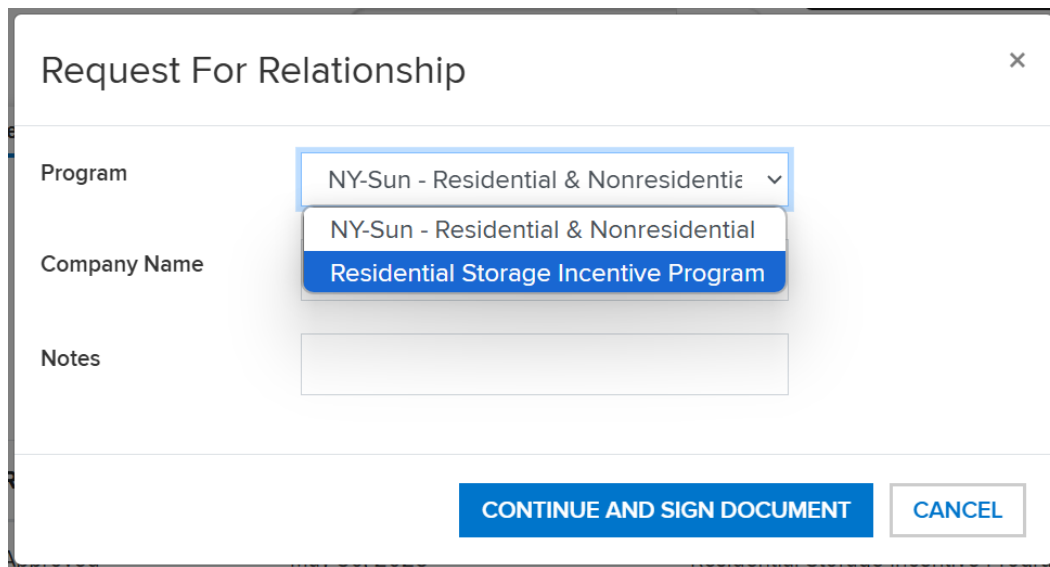
## Step 1

- Click “ADD REQUEST.”  
The “Request For Relationship” menu will appear.



The screenshot shows a web application interface with a navigation bar at the top containing links: Home, Submit a New Application, Projects, Project Invoices, Manage Users, Relationship (highlighted), Project Inspections, Dashboards, and Generate Campaign. Below the navigation bar is a 'Select Language' dropdown and a 'Powered by Google Translate' notice. A 'Filter By Status' dropdown is set to 'Approved'. A table displays relationship data with columns: Company Name, Relationship Status, Relationship Approved Date, Program, and Actions. The table has one row with redacted company and status information, and the program listed as 'Residential Storage Incentive Program'. The Actions column for this row contains links for 'ViewDocument' and 'Cancel'. A red arrow points to a blue '+ ADD REQUEST' button in the top right corner of the main content area.

- In this menu, select “Residential Storage Incentive Program” in the Program dropdown menu.  
Enter the builder’s or contractor’s company name and add notes if necessary.



The screenshot shows a modal window titled 'Request For Relationship' with a close button (X) in the top right corner. The form contains three main sections: 'Program', 'Company Name', and 'Notes'. The 'Program' dropdown menu is open, showing two options: 'NY-Sun - Residential & Nonresidential' and 'Residential Storage Incentive Program', which is highlighted in blue. The 'Company Name' field is empty, and the 'Notes' field is a text area. At the bottom of the modal, there are two buttons: 'CONTINUE AND SIGN DOCUMENT' (blue) and 'CANCEL' (white with a blue border).

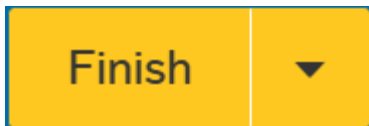
- Click “CONTINUE AND SIGN DOCUMENT” to proceed.

## Step 2

- A form will appear. Review this document.
- When ready, click the “Sign” button to provide your signature.



- Click “Finish” to submit your request.



## Checking Request Status

To check the status of a builder or contractor relationship request:

- Click the “Filter By Status” dropdown menu.
- Select the status option that corresponds to what you are looking for.  
If you recently submitted a request, select “My Pending Requests.”

The status of a request will appear in the “Relationship Status” column.

The screenshot shows a web application interface with a navigation bar at the top containing links: Home, Submit a New Application, Projects, Project Invoices, Manage Users, Relationship (highlighted), Project Inspections, Dashboards, and Generate Campaign. Below the navigation bar is a language selection dropdown labeled "Select Language" and a note "Powered by Google Translate".

The main content area features a "Filter By Status" dropdown menu on the left. The dropdown is open, showing options: Approved, My Pending Requests (highlighted with a red arrow), Pending My Approval, Approved, Rejected, and Cancelled. To the right of the dropdown is a blue button labeled "+ ADD REQUEST".

Below the dropdown is a table with the following columns: Relationship Status, Relationship Approved Date, Program, and Actions. The table contains one row of data:

Relationship Status	Relationship Approved Date	Program	Actions
[Redacted]	[Redacted]	Residential Storage Incentive Program	<a href="#">ViewDocument</a>   <a href="#">Cancel</a>



# Submitting Residential Project Applications

When a Participating Contractor submits an application, the project record status automatically changes to “Submitted.” This creates an email notification (with a link to the application) to NYSERDA staff.

All Residential Energy Storage Incentive Program applications have “Residential Storage Incentive Application” as their record type.

## Beginning Your Application

- Log in to the NYSERDA Portal.
- Click the “Submit a New Application” tab.
- Click the “Residential Storage Incentive Program” tile.

## Choose a program

### Residential Storage Incentive Program

The New York State Energy Research and Development Authority (NYSERDA)'s Retail Storage Incentive Program provides financial incentives for new grid-connected energy storage systems up to five megawatts of alternating current (AC) connection located either with load or connected directly to the distribution system. The primary use case for energy storage systems under this program must be load management and/or grid services. Eligible energy storage systems are chemical, thermal, or mechanical systems that may be installed alone or paired with a solar photovoltaic system, fuel cell, or combined heat and power system.



### Step 1

- Select your company role as builder, contractor, or both, for the project. If you select the “Builder” option, the form will allow you to select a contractor that you have a relationship with. If you select the “Contractor” option, the form will allow you to select a builder that you have a relationship with.

Select your company's role in this project.

**Builder** ☒

Contractor ☐

Both ☐

Please select a Contractor

--None-- ▼


- Click “CONTINUE” to proceed.

## Step 2

- Enter the Project Site details on the “Site Information” page.
- Click “ADD A SITE” to open the entry window.

Site Address (Step 2 of 9)

Add the site location information where the energy storage system will be installed.

[+ ADD A SITE](#) 

Search:

Action	Address 1	Address 2	City	State	Zip	County	Electric Utility Company
Please add a site address.							

- Enter the following details in the “Add New Project Site” window:
  - Address
  - City
  - State (defaults to New York)
  - Zip Code
  - County

- When ready, click “SAVE” to finish and add the site to the Site Information table.
- Click “CONTINUE” to proceed.

### Step 3

If you would like to link an existing NY-Sun application to your Residential Storage application:

- Enter the NY-Sun application number in the textbox.
- Click “LINK NYSUN APPLICATION.”
- Click “CONTINUE.”

If you do not want to link an existing NY-Sun application, click “CONTINUE.”

Link to NY Sun project (Step 3 of 7)

Please enter your 10-digit NY-Sun project application number if the energy storage system is paired with solar. If you are not seeking a NY-Sun Incentive for solar for this project, or if you have not yet initiated a NY-Sun application for this project, you may skip this step.

NY-Sun Application # ⓘ

LINK NYSUN APPLICATION

PREVIOUS

CONTINUE

### Step 4

To enter the Customer on the “Project Contacts” page:

- Click “ADD A CONTACT.”  
An entry window will appear.

Fill in the project contact information with the "add contact" button. Verify and modify the contact information as needed for all contacts.

Your application progress will be saved after you add your email address in Step 3 and click "Continue". An email will be sent to the primary Contractor contact with a link to resume your application.

Please add a Customer role before moving forward.



Show 10 entries

Search:

Action	Primary?	Name	Email	Phone	Company Name	Contact Role
<a href="#">Edit   Add Role</a>	✓					Customer
<a href="#">Add Role</a>	✓					Builder
<a href="#">Add Role</a>	✓					Contractor

Showing 1 to 3 of 3 entries

< 1 >

- Enter the following details in the "Add a Contact" window:
  - First Name
  - Last Name
  - Email
  - Phone
  - Contact Role - Primary (checkbox to designate a primary contact should automatically be checked)
- Click "SAVE CHANGES" to add the contact.
- Click "CONTINUE" to proceed.

## Step 5

- Enter the project details on the "Project Components" page.

You can save your details at any time by clicking "SAVE" at the bottom of the page.
- "Current Block Rate" and "NYSERDA Incentive Amount \$" will automatically populate.

Energy Storage System

Storage System Vendor / Integrator \*

Other Additional Storage System Integrator

Storage Technology / Chemistry Type \*

--None--

Battery Cell Manufacturer or Other Storage OEM \*

Storage Power Capacity, kW (AC) \*

Storage Energy Capacity, kWh (AC) \* ?

Duration of Discharge (hours) \*

Project Cost and Incentive

Add the project costs and the Incentive will be calculated below. If the system is paired with PV, do not include PV costs.

Cost of Energy Storage System \$ \* ?

Current Block Rate

\$200/kWh

NYSERDA Incentive Amount \$

0

- Click “CONTINUE” to proceed.

## Step 6

- Review the details on the “Project Financials” page to ensure the information you entered is correct.
- Click “CONTINUE” to proceed.

## Step 7

- Review the details on the “Application Review” page and read the Certification Statement.
- 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.
- If you would prefer to obtain a wet signature rather than an electronic signature, click “PRINT” to print a copy and upload the signed copy to the deliverable slot on the next page.

- To provide an electronic signature, click the “ELECTRONIC SIGNATURE” button to send the application document to the customer for signature. A confirmation message will appear toward the top of the page when the document has been successfully sent for E-Signature to the customer.

The document has been successfully sent for E-Signature to the customer.

- PLEASE NOTE: Once the customer signs the application document, the signed document will automatically upload to the “Signed Application” document slot on the “Paperwork Record” page. There may be a delay of up to an hour between the customer signing the application document and the automatic upload.
- Click “CONTINUE” to proceed.

## Step 8

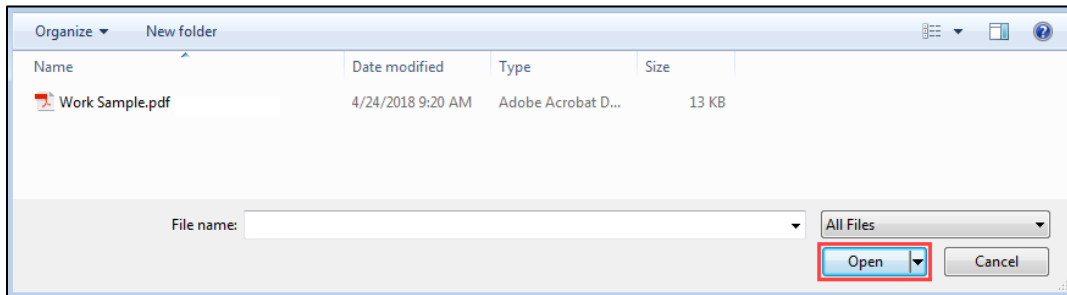
The “Paperwork Record” page lets you upload all required documents. Please note that the Residential Energy Storage Incentive Program rules may change over time, meaning the documents you see listed under “Required Documents” and “Other Documents” on your application may be different than what is shown below. Up-to-date details on the required documents are available in the [Program Manual](#).

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

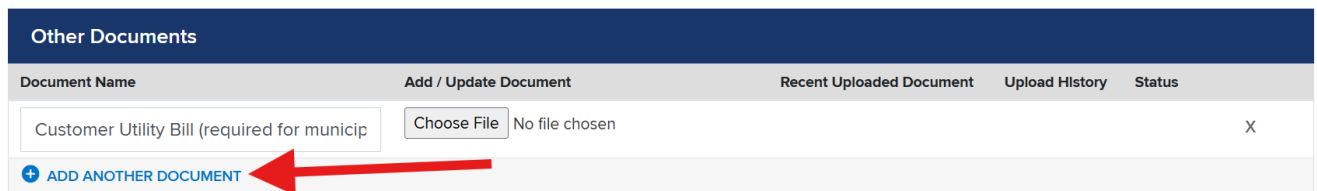
Required Documents				
Document Name	Recent Uploaded Document	Upload History	Status	Add / Update Document ?
Customer Acknowledgement Form				<input type="button" value="Choose File"/> No file chosen
One-line or three-line electrical diagram				<input type="button" value="Choose File"/> No file chosen
Photos of System Site				<input type="button" value="Choose File"/> No file chosen
Proof of Eligibility for Residential Inclusive Storage Incentive				<input type="button" value="Choose File"/> No file chosen
Signed Application				<input type="button" value="Choose File"/> No file chosen
Site Plan				<input type="button" value="Choose File"/> No file chosen
Energy Storage System/Product Specifications				<input type="button" value="Choose File"/> No file chosen
Proof of Energy System UL / Safety Certifications				<input type="button" value="Choose File"/> No file chosen
Proof of Storage System Warranty				<input type="button" value="Choose File"/> No file chosen

Other Documents				
Document Name	Add / Update Document	Recent Uploaded Document	Upload History	Status
Customer Utility Bill (required for municip	<input type="button" value="Choose File"/> No file chosen			X
+ ADD ANOTHER DOCUMENT				

- Navigate to the document's location, select it, and click "Open."  
The document name will display in the "Add/Update Document" column.



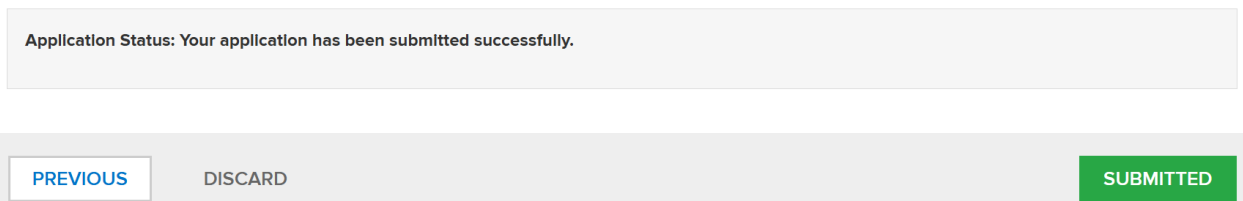
- If you need to upload a supporting document, enter the document name and click "Choose File."
- To add additional documents in the "Other Documents" section, click "ADD ANOTHER DOCUMENT" to create a new table row. As before, enter a document name and upload the document using the steps above.



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

## Step 9

- On the "Submit Application" page, click "SUBMIT" to submit your application. Once projects are submitted, they cannot be changed.
- After clicking "SUBMIT," you will receive a confirmation message that says, "Your application has been submitted successfully."





**NYSERDA**  
New York State Energy Research  
and Development Authority

**New York State  
Energy Research and  
Development Authority**

17 Columbia Circle  
Albany, NY 12203-6399

**toll free:** 866-NYSERDA  
**local:** 518-862-1090  
**fax:** 518-862-1091

[info@nyserda.ny.gov](mailto:info@nyserda.ny.gov)  
[nyserda.ny.gov](http://nyserda.ny.gov)