Residential and Retail Energy Storage Incentive Programs

User Guide

For Residential Contractors and Builders

June 2025

NEW YORK STATE

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.

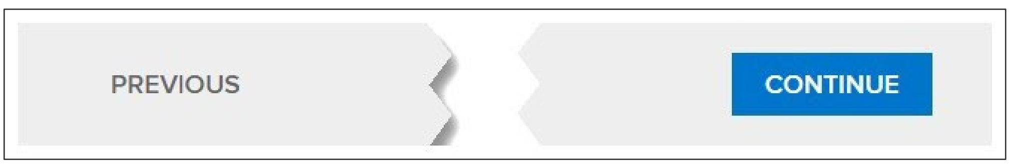
See the Residential and Retail Energy Storage Market Acceleration Incentives Program Manual for rules and requirements.

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

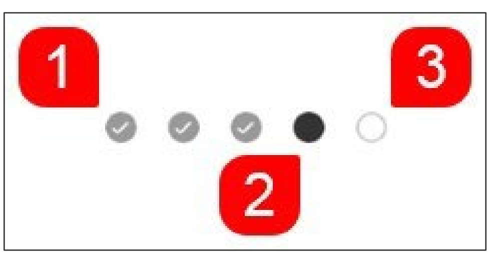
Navigating Salesforce

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).

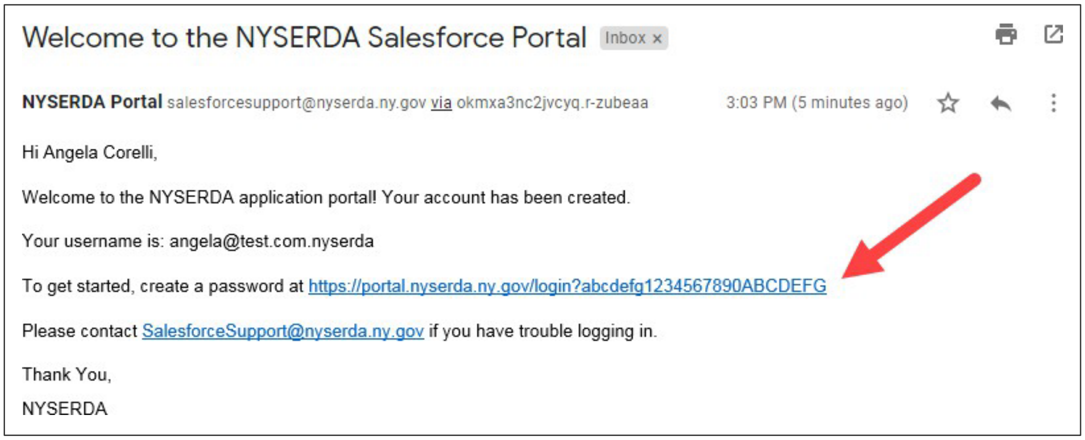


Note that you can log out during the application process and return to complete it later.
The NYSERDA Portal will save your progress.

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.



Welcome to the NYSERDA Salesforce Portal Inbox x

NYSERDA Portal salesforcesupport@nyserda.ny.gov via okmxa3nc2jvcyq.r-zubeaa 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.nyserda

To get started, create a password at https://portal.nyserda.ny.gov/login?abcdefg1234567890ABCDEFG

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

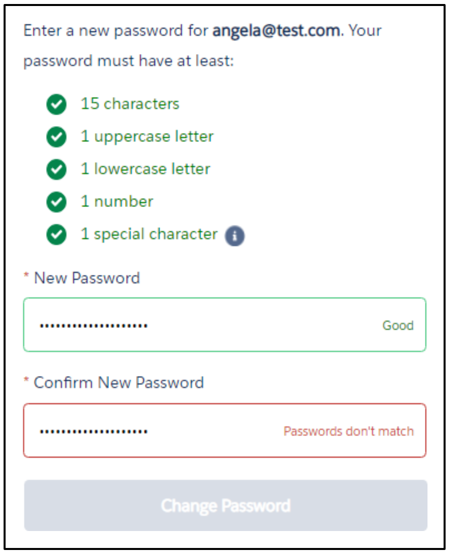
Thank You,
NYSERDA

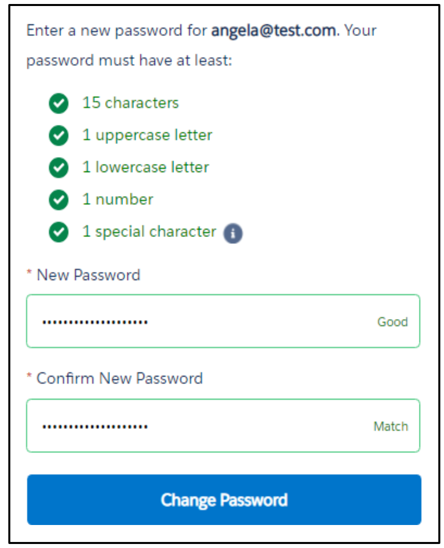
- On the “Change Your Password” page, enter a password in the “New Password” field. The password must have at least:
  - 15 characters
  - 1 uppercase letter
  - 1 lowercase letter
  - 1 number
  - 1 special character (e.g., $ or &)

The page displays a checkbox confirmation when the password meets each requirement.

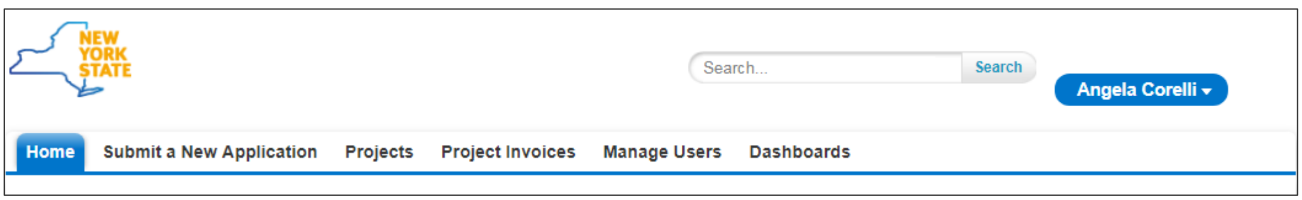
- After you have created a password, re-enter it in the “Confirm New Password.” The system indicates mismatched entries.

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





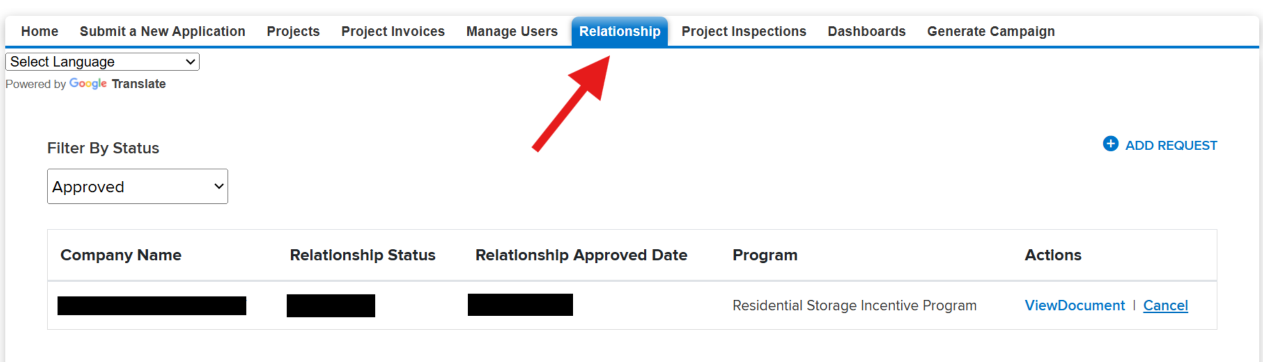
- When the passwords match, click "Change Password" to finish and open the home page for the NYSERDA Portal.



Setting Up Builder-Contractor Relationships

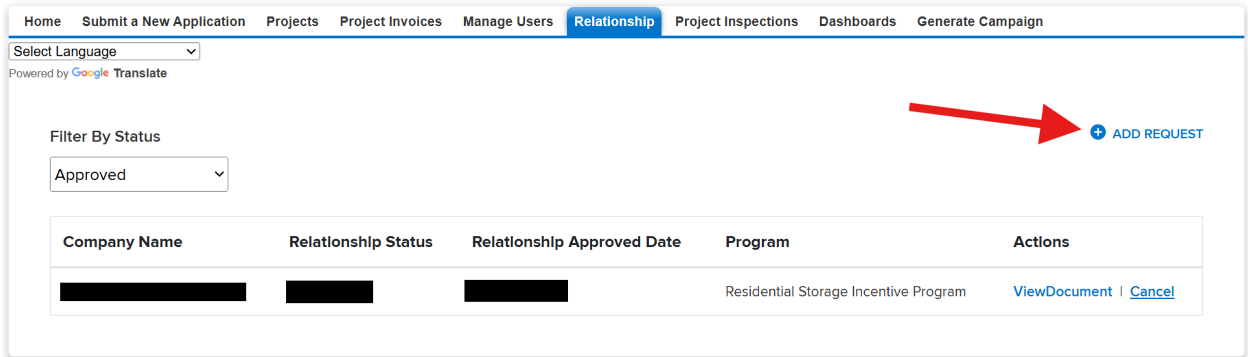
To request a new builder or contactor relationship:

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

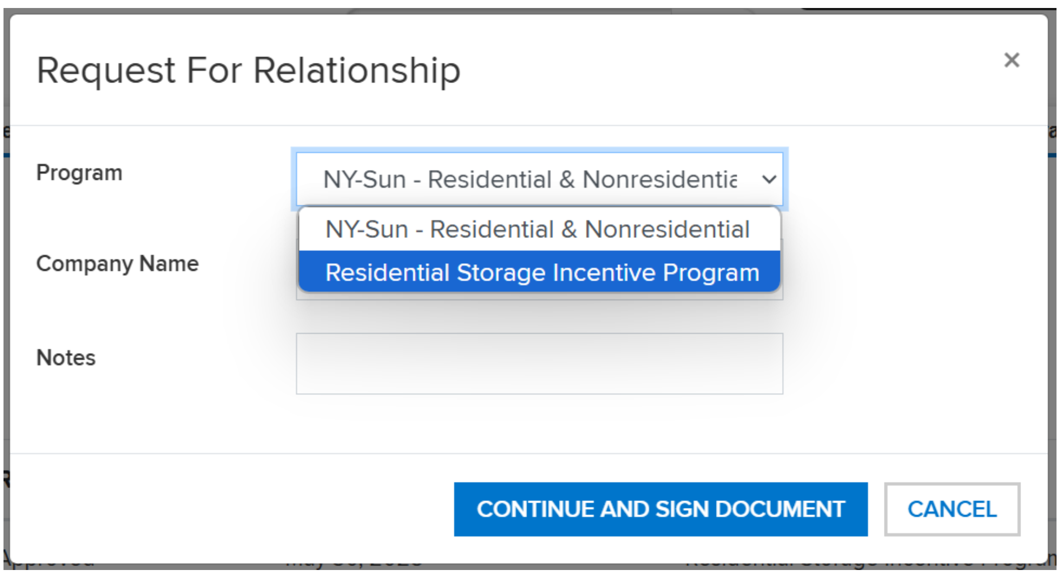


Step 1

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



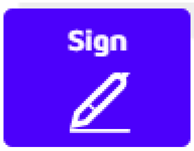
- In this menu, select “Residential Storage Incentive Program” in the Program dropdown menu. Enter the builder’s or contractor’s company name and add notes if necessary.



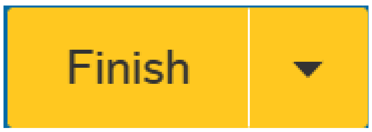
- Click “CONTINUE AND SIGN DOCUMENT” to proceed.

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.

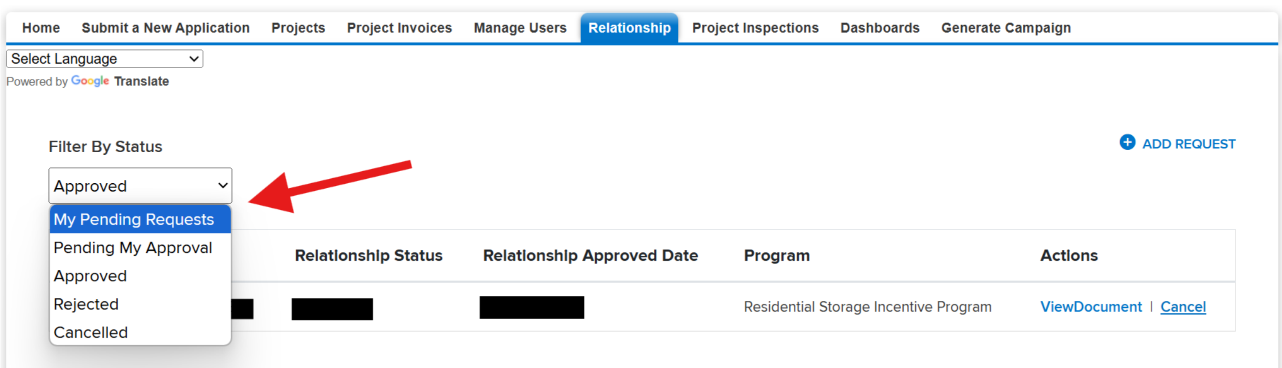


Checking Request Status

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.



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.

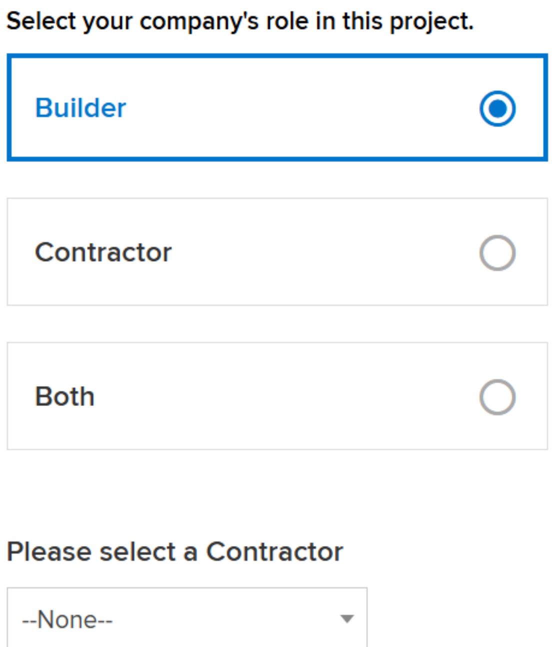
All Residential Energy Storage Incentive Program applications have "Residential Storage Incentive Application" as their record type.

Beginning Your Application

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

Step 1

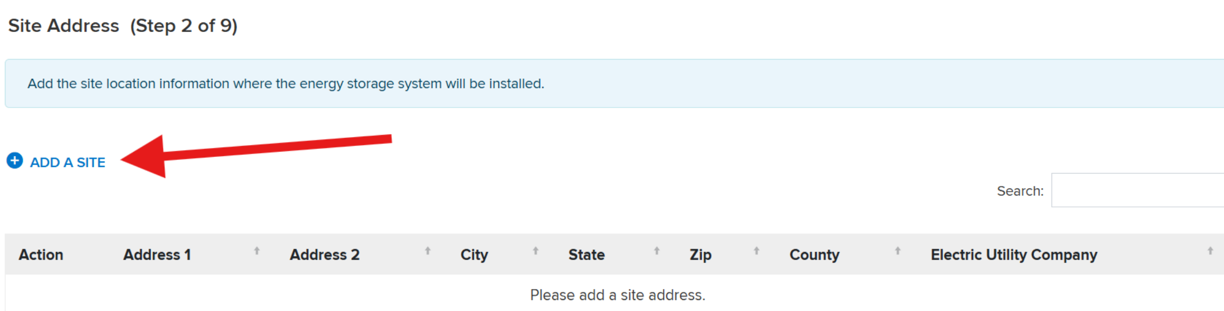
- Select your company role as builder, contractor, or both, for the project.
  If you select the "Builder" option, the form will allow you to select a contractor that you have a relationship with. If you select the "Contractor" option, the form will allow you to select a builder that you have a relationship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



- 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.



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

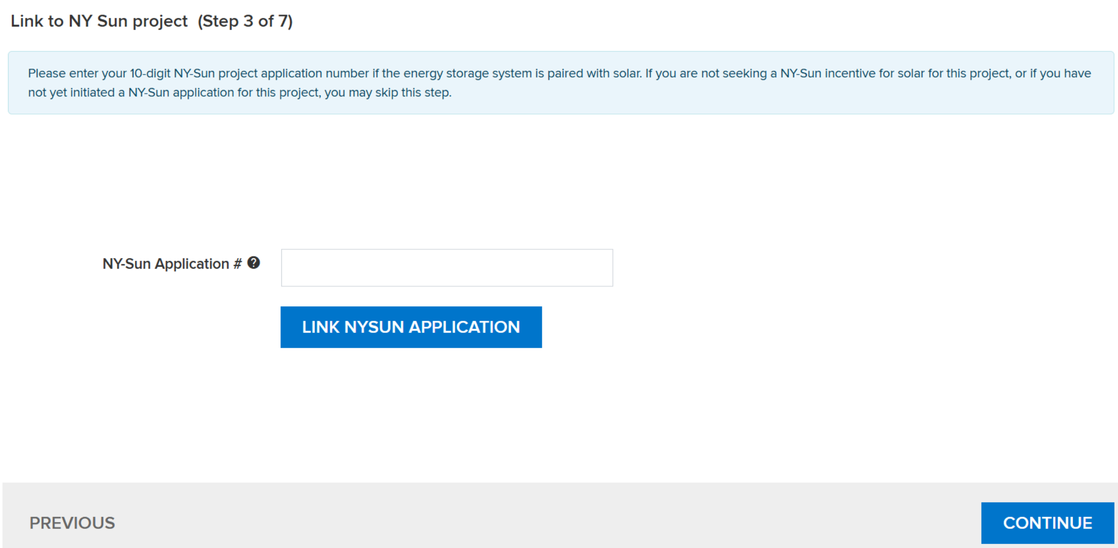
- When ready, click “SAVE” to finish and add the site to the Site Information table.
- Click “CONTINUE” to proceed.

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.”

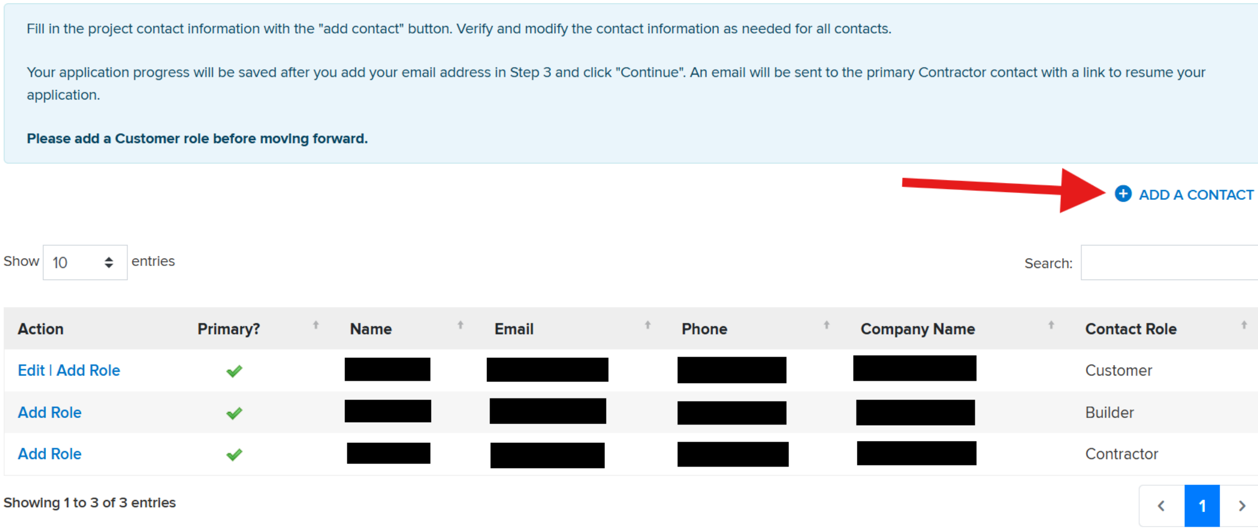
If you do not want to link an existing NY-Sun application, click “CONTINUE.”



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.

ADD A CONTACT

Show 10 entries Search:

Action	Primary?	Name	Email	Phone	Company Name	Contact Role
Edit I Add Role	✔	[redacted]	[redacted]	[redacted]	[redacted]	Customer
Add Role	✔	[redacted]	[redacted]	[redacted]	[redacted]	Builder
Add Role	✔	[redacted]	[redacted]	[redacted]	[redacted]	Contractor

Showing 1 to 3 of 3 entries

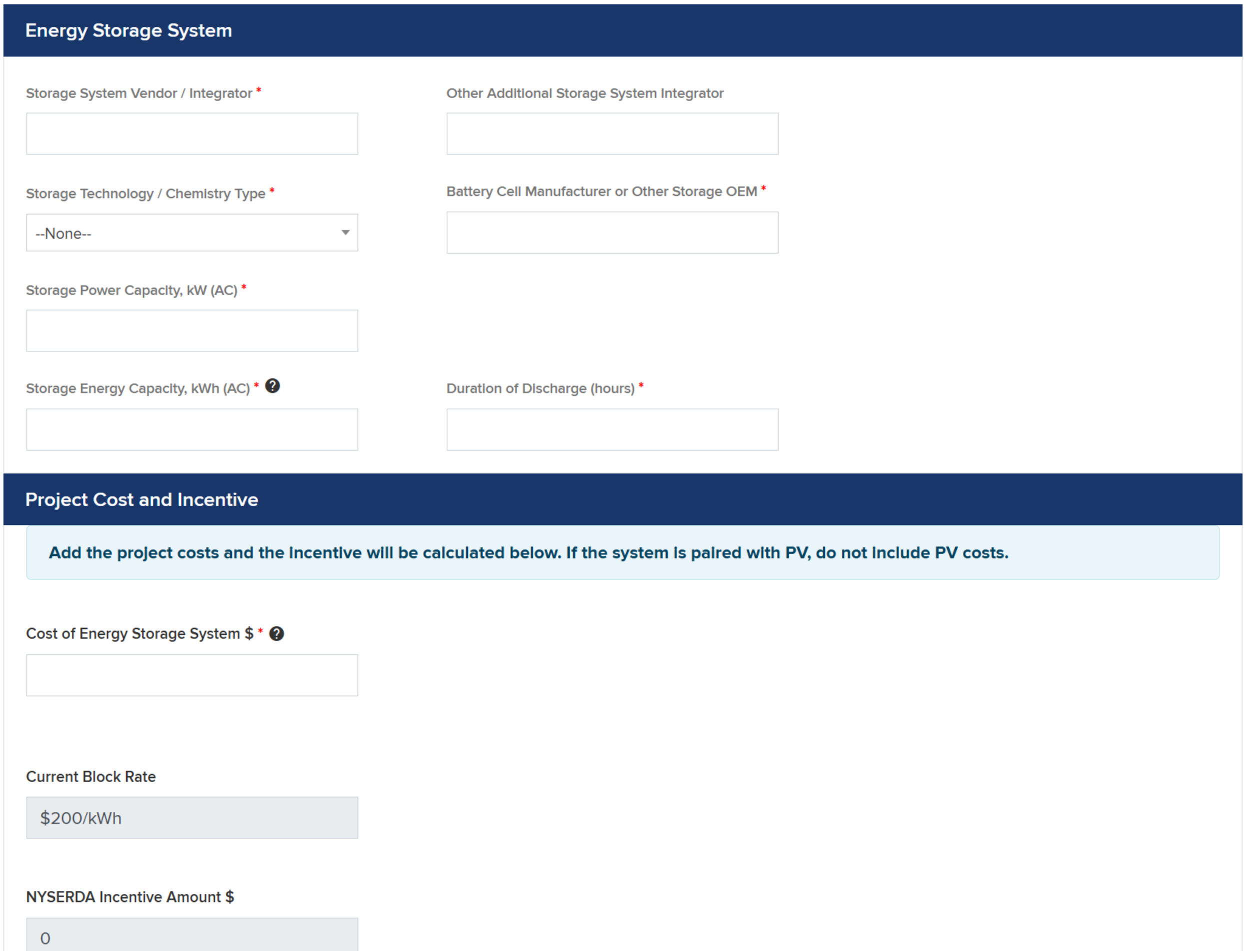
1

- 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

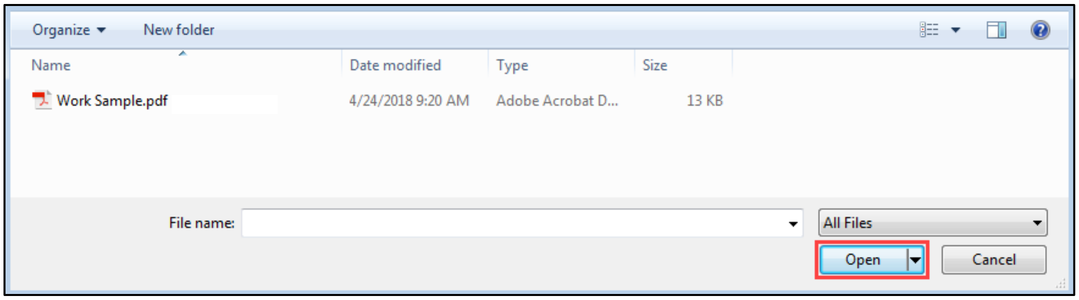
Document Name	Recent Uploaded Document	Upload History	Status	Add / Update Document
Customer Acknowledgement Form				Choose File No file chosen
One-line or three-line electrical diagram				Choose File No file chosen
Photos of System Site				Choose File No file chosen
Proof of Eligibility for Residential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

Other Documents

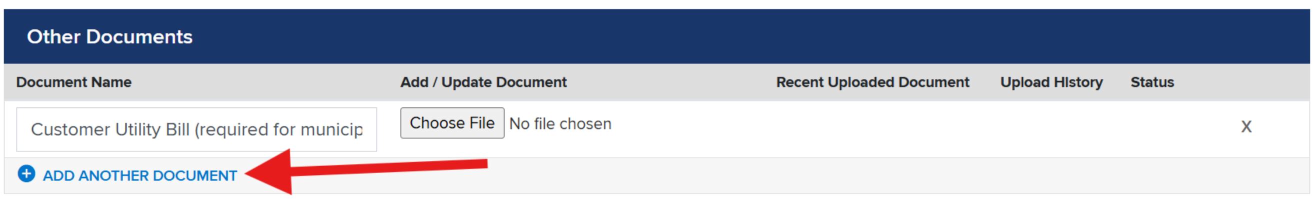
Document Name	Add / Update Document	Recent Uploaded Document	Upload History	Status	
Customer Utility Bill (required for municip	Choose File No file chosen				X

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.



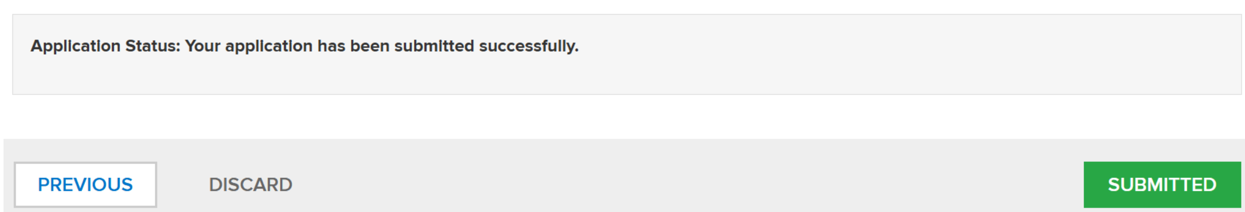
- If you need to upload a supporting document, enter the document name and click "Choose File."
- To add additional documents in the "Other Documents" section, click "ADD ANOTHER DOCUMENT" to create a new table row. As before, enter a document name and upload the document using the steps above.



- 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."



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