

# POWERCLERK INSTRUCTIONS

## Residential/Small Commercial Program



NY-Sun Incentive Program information is located online on the NY-Sun website: <http://ny-sun.ny.gov/>. The Residential/Small Commercial (<200kW) Program Manual is available at <http://ny-sun.ny.gov/For-Installers/Forms-Manuals-Tools>.

Additional useful documents, including sample application documents, program announcements, and presentations, are available at <http://ny-sun.ny.gov/For-Installers/Contractor-Resources>.

**PowerClerk Website:** <https://powernaturally.powerclerk.com/> Sign in using the user name sent to you by email from PowerClerk. **You will have a different user name for each 4-digit installer/contractor number assigned to you.**

### This document includes instructions for the following:

1. How to enter project applications into PowerClerk for the Residential/Small Commercial (<200kW) Program
2. Application Processing
3. Reducing File Sizes
4. Changes to Submitted Project Applications
5. NY-Sun Team Contact Information

### 1) ENTERING PROJECT APPLICATIONS INTO POWERCLERK:

- Log into the Powerclerk website at <https://powernaturally.powerclerk.com/>
- Click “New Application” and select PON 2112, or PON 2112 LI (for project on Long Island)
- Completely fill out the “Contractor Selection”, “Customer Contacts”, “Site Address”, “Customer Site Info”, and “Project Components” pages. Required items are marked with a red asterisk. You can navigate between these pages with the “Back” and “Next” buttons on the bottom of the page.
- The “Application Review” page will populate with the information you have entered on the previous pages. Check the “Application Review” page to make sure it is complete and correct.
- Print out a copy of the “Application Review” page. This print-out is your project application form, and needs to be signed by the customer and the installer/contractor.
- On the “Paperwork Record” page, upload the required documents. For details on the requirements for these documents, please see the Program Manual. The maximum file size that you can upload per document is 5MB.
  - Site Plan
  - Project Application (the print-out of the “Application Review” page, signed by the customer and the contractor/installer)
  - Photos of System Site
  - One-line or Three-line electrical diagram
  - Shading Analysis Results and Estimate of Annual Output
  - Utility Bill with 12 months of electric use history (required for non-residential projects only)
  - GJGNY Proforma Tool (Excel required for GJGNY projects only)
  - GJGNY Preapproval Letter (PDF required for GJGNY projects only)
  - Any additional or miscellaneous documents
- The “Submit Application” page will list any required fields items that still need to be completed. Once your application is complete, click the “Submit Incentive Application” button.

- Once you submit an application, you will no longer be able to modify it. Any changes will need to be made by NYSERDA staff. You will still be able to view your project application.

## 2) APPLICATION PROCESSING

Once you submit the project application, it will show a status of “Submitted via Internet” in Powerclerk. The PV Team will do an initial review, mark it Received (provided all required paperwork is uploaded), and assign a project number extension (XXXX-00000), XXXX being your individually-assigned installer or contractor number and 00000 will be the specific contract number. Once the application has been submitted electronically, these are the various status categories you will see for each project:

**Received** – Project is marked this status when we receive all necessary forms. Within a day or two you will notice that your project has a 5 digit number assigned after your PV installer number. This lets you know that your project has been “pre-encumbered” and if you click on the Show Contracts Link at the bottom of the screen, it will bring up the encumbered information for your project. (Project can be in this status several weeks depending on the number of applications received in the month)

**Pending Approval** – If your project is in this status, it means your application has been reviewed and is currently routing through NYSERDA’s contract system. (Generally, project will be in this status between 1-2 weeks)

**Approved** – Application has been approved and you should have received the award notice by email. If you click on the “Show Contract Details” you will see the Purchase Order number which you will need when you submit the Incentive Request Forms.

**Completed** –NYSERDA has received all required documents and the final request for payment in order to “close out” the project.

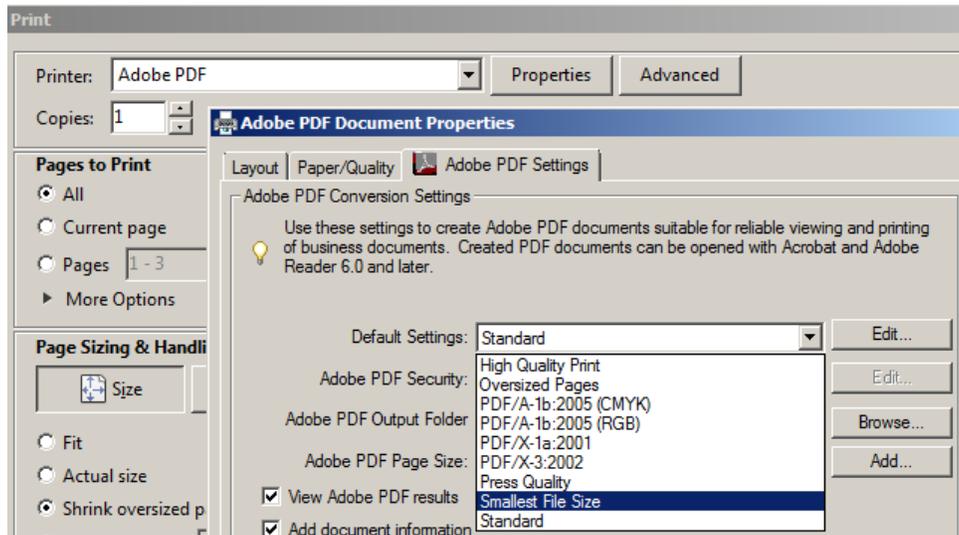
**Cancelled or Denied** – The project is no longer open. If you wish to move ahead with a Cancelled or Denied project, you will need to reapply with a new application.

**Please do not inquire on project statuses unless your project appears to be stalled in any of the above status categories.**

## 3) REDUCING FILE SIZES

Powerclerk has a maximum file size of 5MB for uploads. If you are exceeding the maximum file size, consider one of the following methods:

- For site photos, click-and-drag the photos into a Microsoft Word document, and then save the Word document as a pdf.
- To reduce the size of a photo, open the photo with Microsoft Office Picture Manager. Click “Edit Pictures” and then “Resize.” Select “Predefined width X height” and then “Web-Large (640 X 480 px).
- To reduce the size of a pdf, click “File”, then “Print”, Print as PDF, “Properties”, and “Smallest File Size”.



#### 4) CHANGES TO PROJECT APPLICATIONS

The Residential/Small Commercial Program has a Change Request Form available at <http://ny-sun.ny.gov/For-Installers/Forms-Manuals-Tools>. For all changes, please email the appropriate form to the following address, as determined by program:

Residential/Small Commercial <200kW Con Edison & Upstate Utility Territories:  
[PVFORMS@NYSERDA.NY.GOV](mailto:PVFORMS@NYSERDA.NY.GOV)

Residential/Small Commercial <200kW Long Island: [PVFORMS@PSEG.COM](mailto:PVFORMS@PSEG.COM)

#### CHANGE ORDER

If you have a Change Order after submitting an application in PowerClerk, use the **Change Request Form**. Change Orders need to be clearly identified as change orders together with the project number in the subject line of the email. Please submit change order as soon as you know there is a change. Do NOT submit together with the Incentive Request.

**When submitting a Change Request Form, please use the following naming convention in subject line of email:**

*Change Order Form, PV (4 digit installer # + Application #) - Name of Customer*

#### EXTENSION REQUEST

Use the **Extension Request Form** and email to above email address. Extension Requests will only be granted if there are legitimate and verifiable reasons related to new construction or equipment availability. You must submit proof. Refer to the Program Manual for rules on submitting extension requests.

**When submitting an Extension Request Form, please use the following naming convention in the subject of the email:**

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90 Day Project Extension Residential, PV (4 digit installer # + Application #) - Name of Customer

OR

90 Day Project Extension Non-Residential, PV (4 digit installer # + Application #) - Name of Customer

**PROJECT CANCELLATION**

Use the **Change Request Form** if project needs to be cancelled and email to above email address.

**When submitting a Change Request Form to cancel a project, please use the following naming convention in subject line of email:**

Cancellation Request, PV (4 digit installer # + Application #) - Name of Customer

**5) CONTACT INFORMATION**

<b>NY-SUN DIRECTORY</b>			
Director	David Sandbank	518-862-1090 Ext 3104	<a href="mailto:David.Sandbank@nyserda.ny.gov">David.Sandbank@nyserda.ny.gov</a>
Office Admin	Maryfrancis Keegan	518-862-1090 Ext 3523	<a href="mailto:Maryfrancis.Keegan@nyserda.ny.gov">Maryfrancis.Keegan@nyserda.ny.gov</a>
<b>Systems Above 200 kW</b>			
Program Manager	Peter Savio	518-862-1090 Ext 3334	<a href="mailto:Peter.Savio@nyserad.ny.gov">Peter.Savio@nyserad.ny.gov</a>
	Dave Crudele	518-862-1090 Ext 3095	<a href="mailto:Dave.Crudele@nyserda.ny.gov">Dave.Crudele@nyserda.ny.gov</a>
	Alison Neligan	518-862-1090 Ext 3397	<a href="mailto:Alison.Neligan@nyserda.ny.gov">Alison.Neligan@nyserda.ny.gov</a>
	Maureen Leddy	518-862-1090 Ext 3318	<a href="mailto:Maureen.Leddy@nyserda.ny.gov">Maureen.Leddy@nyserda.ny.gov</a>
	Lillie Ghobrial	518-862-1090 Ext 3093	<a href="mailto:Lillie.Ghobrial@nyserda.ny.gov">Lillie.Ghobrial@nyserda.ny.gov</a>
<b>Systems 200 kW and below and Solar Thermal</b>			
Technical Assistance	Frank Mace	518-862-1090 Ext 3433	<a href="mailto:Frank.Mace@nyserad.ny.gov">Frank.Mace@nyserad.ny.gov</a>
Power Clerk and Contracts	Marci Brunner	518-862-1090 Ext 3415	<a href="mailto:Marci.Brunner@nyserda.ny.gov">Marci.Brunner@nyserda.ny.gov</a>
Installer/Contractor/Application Intake	Leslie Polsinello	518-862-1090 Ext 3473	<a href="mailto:Leslie.Polsinello@nyserda.ny.gov">Leslie.Polsinello@nyserda.ny.gov</a>
Technical Assistance	Luke Forster	518-862-1090 Ext 3495	<a href="mailto:Luke.Forster@nyserda.ny.gov">Luke.Forster@nyserda.ny.gov</a>
Incentive Requests	Jason Mangione	518-862-1090 Ext 3482	<a href="mailto:Jason.Mangione@nyserda.ny.gov">Jason.Mangione@nyserda.ny.gov</a>
<b>PSEG-LI Staff</b>			
<b>Systems 200kW and below on Long Island</b>			
Manager, Renewable Programs	Robert Boerner	516-408-8328	<a href="mailto:Robert.Boerner@pseg.com">Robert.Boerner@pseg.com</a>
Lead Analyst, Solar/Wind Programs	Jennifer Rommel	631-844-3835	<a href="mailto:Jennifer.Rommel@pseg.com">Jennifer.Rommel@pseg.com</a>
Tech Support/Lead Engineer	Elaine Akley	631-844-3746	<a href="mailto:Elaine.Akley@pseg.com">Elaine.Akley@pseg.com</a>

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Process Lead, Energy Efficiency Support Services	Stacey Wagner	631-844-3508	<a href="mailto:Stacey.Wagner@pseg.com">Stacey.Wagner@pseg.com</a>
Rebate Processing Lead	Linda Cavalluzzi	631-844-3504	<a href="mailto:Linda.Cavalluzzi@pseg.com">Linda.Cavalluzzi@pseg.com</a>
<b>Community Solar</b>			
Program Manager	Max Joel	212-971-5342 ext 3035	<a href="mailto:Max.Joel@nyserda.ny.gov">Max.Joel@nyserda.ny.gov</a>
	Lisabeth Tremblay	212-971-5342 ext 3632	<a href="mailto:Lisabeth.Tremblay@nyserda.ny.gov">Lisabeth.Tremblay@nyserda.ny.gov</a>
<b>QA/QC Staff</b>			
<i>Program Manager</i>	Kim Lenihan	518-862-1090 Ext 3410	<a href="mailto:Kimberly.Lenihan@nyserda.ny.gov">Kimberly.Lenihan@nyserda.ny.gov</a>
QA Project Manager	Brian Atchinson	518-862-1090 Ext 3382	<a href="mailto:Brian.Atchinson@nyserda.ny.gov">Brian.Atchinson@nyserda.ny.gov</a>