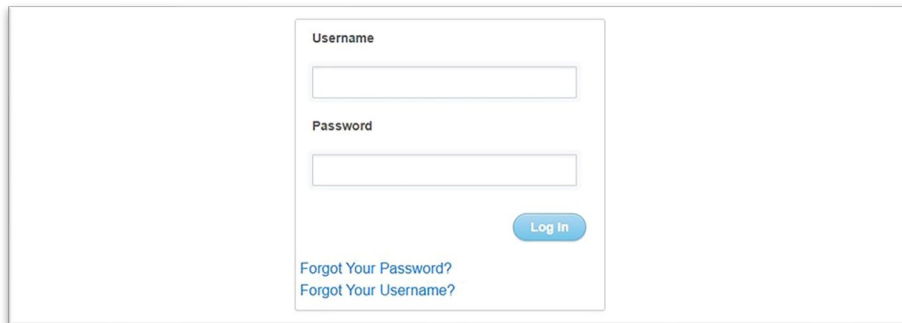


NY-SUN INCLUSIVE COMMUNITY SOLAR ADDER MILESTONE SUBMISSION AND INVOICING GUIDE

Follow this step-by-step guide to upload and submit milestone deliverables and invoices for Inclusive Community Solar Adder (ICSA) projects. Prior to submitting an invoice, the Contractor must first submit all deliverables for the related milestone through the NYSERDA Portal. Once NY-Sun Staff has approved the deliverables for the milestone, the Contractor may submit an invoice for it through the Portal to receive payment. Section A (starting on page 1) of this guide provides step-by-step instructions on how to upload milestone deliverables. Section B (starting on page 7) describes how to submit an invoice after NY-Sun has approved the milestone deliverables.

A. HOW TO UPLOAD MILESTONE DELIVERABLES

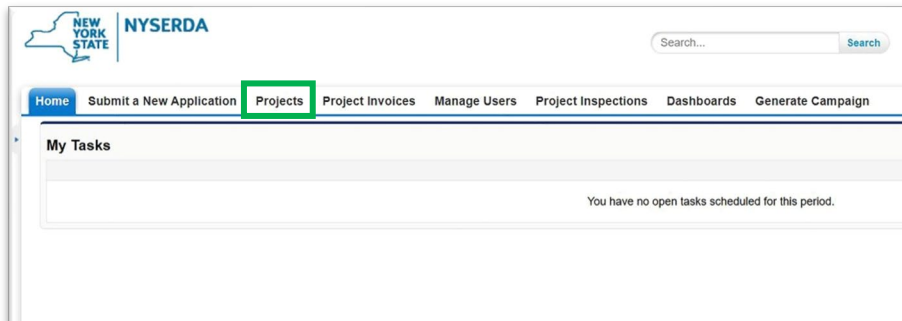
1. Log into the NYSERDA Portal at <https://portal.nyserda.ny.gov/PortalLoginPage>



The screenshot shows a login form with the following elements:

- A text input field labeled "Username".
- A text input field labeled "Password".
- A blue "Log In" button.
- Links for "Forgot Your Password?" and "Forgot Your Username?" below the password field.

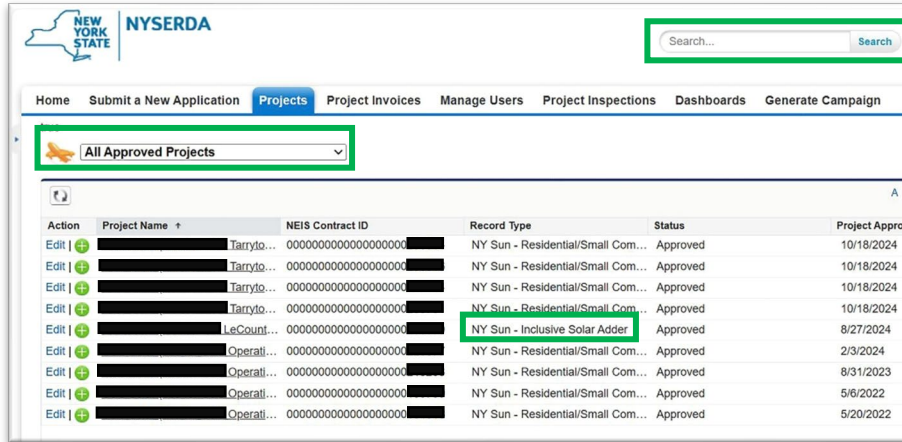
2. Select the **Projects** tab.



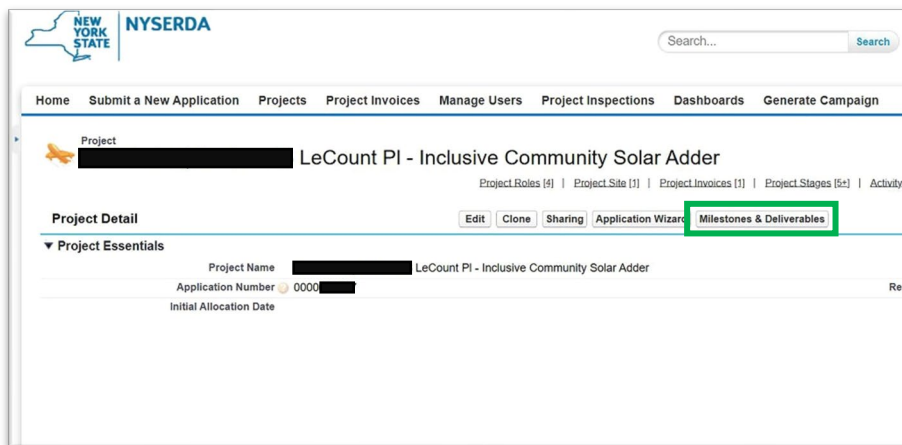
The screenshot shows the NYSERDA Portal dashboard with the following elements:

- Top navigation bar with the NYSERDA logo and a search bar.
- Horizontal menu with tabs: Home, Submit a New Application, **Projects** (highlighted with a green box), Project Invoices, Manage Users, Project Inspections, Dashboards, and Generate Campaign.
- Main content area titled "My Tasks" with a message: "You have no open tasks scheduled for this period."

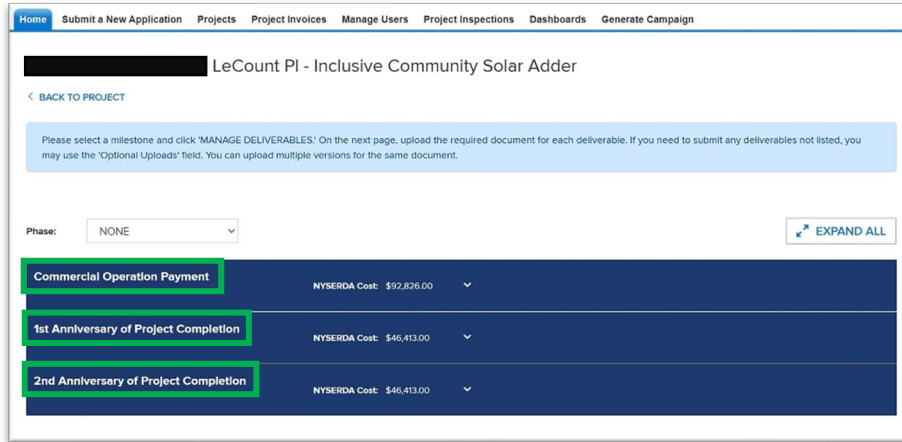
- Search for the ICSA project you wish to submit milestone deliverables for by using the **Search** feature or by selecting **All Approved Projects** in the list view. ICSA projects have **NY-Sun – Inclusive Solar Adder** in the **Record Type** column.



- After finding the project, click the **Milestones & Deliverables** button at the top of the page.



- On the Milestones and Deliverables page, select the milestone you would like to submit an invoice for. In this example, the contractor will submit deliverables and invoice for the Commercial Operation Payment.



Home | Submit a New Application | Projects | Project Invoices | Manage Users | Project Inspections | Dashboards | Generate Campaign

LeCount PI - Inclusive Community Solar Adder

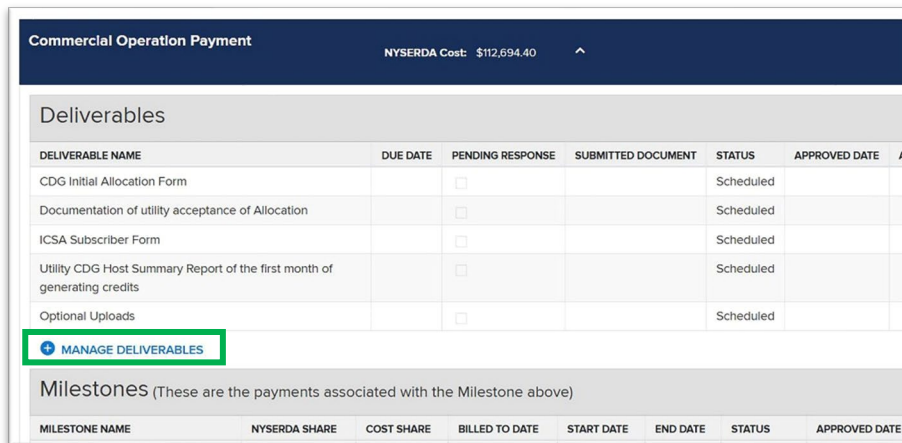
< BACK TO PROJECT

Please select a milestone and click 'MANAGE DELIVERABLES'. On the next page, upload the required document for each deliverable. If you need to submit any deliverables not listed, you may use the 'Optional Uploads' field. You can upload multiple versions for the same document.

Phase: EXPAND ALL

Commercial Operation Payment	NYSERDA Cost: \$92,826.00	▼
1st Anniversary of Project Completion	NYSERDA Cost: \$46,413.00	▼
2nd Anniversary of Project Completion	NYSERDA Cost: \$46,413.00	▼

- In the milestone dropdown, select **Manage Deliverables**.



Commercial Operation Payment NYSERDA Cost: \$112,694.40 ^

Deliverables

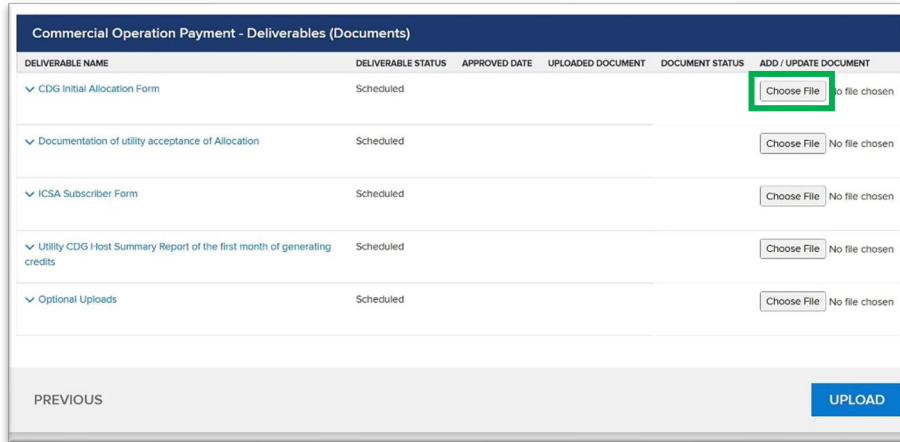
DELIVERABLE NAME	DUE DATE	PENDING RESPONSE	SUBMITTED DOCUMENT	STATUS	APPROVED DATE	AP
CDG Initial Allocation Form		<input type="checkbox"/>		Scheduled		
Documentation of utility acceptance of Allocation		<input type="checkbox"/>		Scheduled		
ICSA Subscriber Form		<input type="checkbox"/>		Scheduled		
Utility CDG Host Summary Report of the first month of generating credits		<input type="checkbox"/>		Scheduled		
Optional Uploads		<input type="checkbox"/>		Scheduled		

[MANAGE DELIVERABLES](#)

Milestones (These are the payments associated with the Milestone above)

MILESTONE NAME	NYSERDA SHARE	COST SHARE	BILLED TO DATE	START DATE	END DATE	STATUS	APPROVED DATE
----------------	---------------	------------	----------------	------------	----------	--------	---------------

- Click **Choose File** under the **Add/Update Document** column and select the desired file for each deliverable. You do not need to upload a file in the **Optional Uploads** row to move forward.



DELIVERABLE NAME	DELIVERABLE STATUS	APPROVED DATE	UPLOADED DOCUMENT	DOCUMENT STATUS	ADD / UPDATE DOCUMENT
CDG Initial Allocation Form	Scheduled				Choose File No file chosen
Documentation of utility acceptance of Allocation	Scheduled				Choose File No file chosen
ICSA Subscriber Form	Scheduled				Choose File No file chosen
Utility CDG Host Summary Report of the first month of generating credits	Scheduled				Choose File No file chosen
Optional Uploads	Scheduled				Choose File No file chosen

PREVIOUS UPLOAD

Notes: You must submit all deliverables for the milestone you are invoicing for. Per the *'Inclusive Community Solar Adder: Payment Process, Funding Amount, and Subscriber Reporting'* section in the [NY-Sun Program Manual](#), the required deliverables for each milestone are:

Milestone 1 (also referred to as the 'Commercial Operation Payment')

Milestone 1 deliverables must include documentation from either the first, second, or third month of credit allocation to the subscribers. This corresponds to the first three months of operation (*eg. if the project's first month of operation is June 2025, the contractor may choose to submit the documentation for June 2025, July 2025, or August 2025 as the Milestone 1 Allocation*).

- [ICSA Subscriber Submission Form](#)
- CDG Initial or Monthly Allocation Form for the Milestone 1 Allocation
- Documentation of utility acceptance of Initial or Monthly Allocation Form for the Milestone 1 Allocation
- Utility CDG Host Allocation Report for the initial allocation period or Milestone 1 Allocation

Milestone 2 (also referred to as the 'Year 1 Performance Payment')

Milestone 2 deliverables must include documentation from the twelfth month after the Milestone 1 Allocation (*eg. If the Milestone 1 Allocation is for August 2025, the Milestone 2 Allocation must be for August 2026*).

- [ICSA Subscriber Submission Form](#)
- CDG Monthly Allocation Form for the Milestone 2 Allocation

- Documentation of utility acceptance of Monthly Allocation Form for the Milestone 2 Allocation
- Utility CDG Host Allocation Report for the allocation period

Milestone 3 (also referred to as the ‘Year 2 Performance Payment’)

Milestone 3 deliverables must include documentation from the twelfth month after the Milestone 2 Allocation (eg. If the Milestone 2 Allocation is for August 2026, the Milestone 3 Allocation must be for August 2027).

- [ICSA Subscriber Submission Form](#)
- CDG Monthly Allocation Form for the Milestone 3 Allocation
- Documentation of utility acceptance of Monthly Allocation Form for the Milestone 3 Allocation
- Utility CDG Host Allocation Report for the allocation period

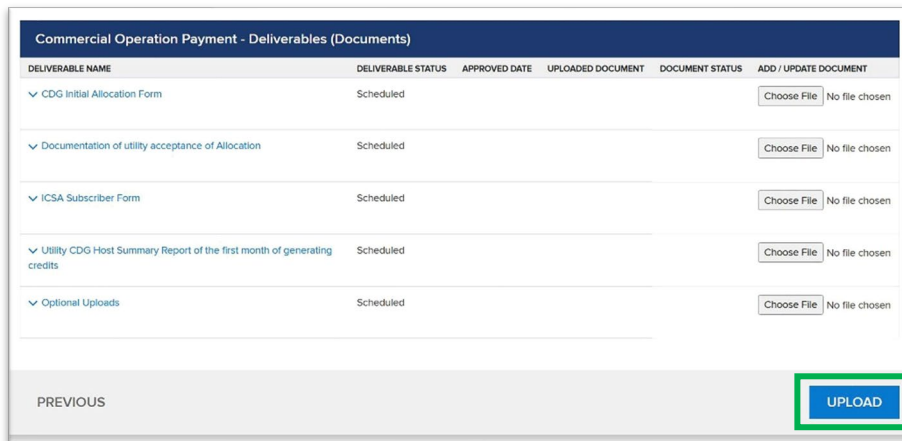
Submit Excel spreadsheets (‘.xlsx’) for the:

- CDG Allocation Form
- ICSA Subscriber Submission Form
- Utility CDG Host Allocation Report

Submit a PDF file (‘.pdf’) for the:

- Documentation of utility acceptance of CDG Allocation Form

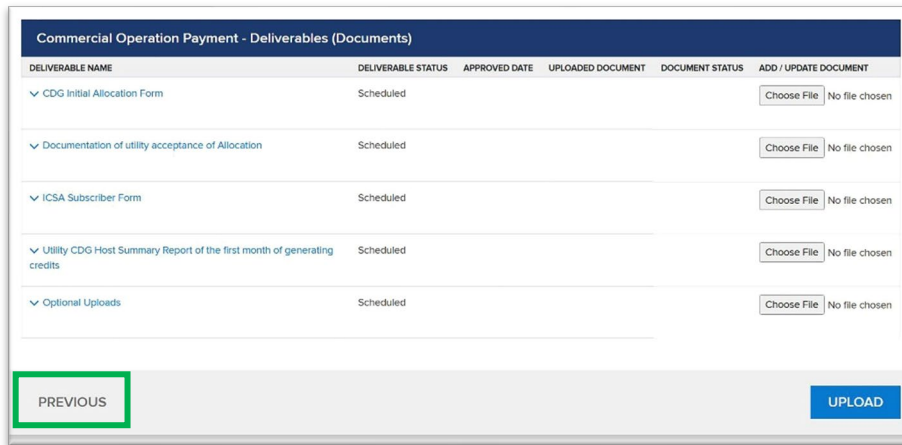
8. Once you have chosen a file for each deliverable, click **Upload** at the bottom right corner of the page. This saves all the actions taken in the previous steps.



DELIVERABLE NAME	DELIVERABLE STATUS	APPROVED DATE	UPLOADED DOCUMENT	DOCUMENT STATUS	ADD / UPDATE DOCUMENT
CDG Initial Allocation Form	Scheduled				Choose File No file chosen
Documentation of utility acceptance of Allocation	Scheduled				Choose File No file chosen
ICSA Subscriber Form	Scheduled				Choose File No file chosen
Utility CDG Host Summary Report of the first month of generating credits	Scheduled				Choose File No file chosen
Optional Uploads	Scheduled				Choose File No file chosen

PREVIOUS UPLOAD

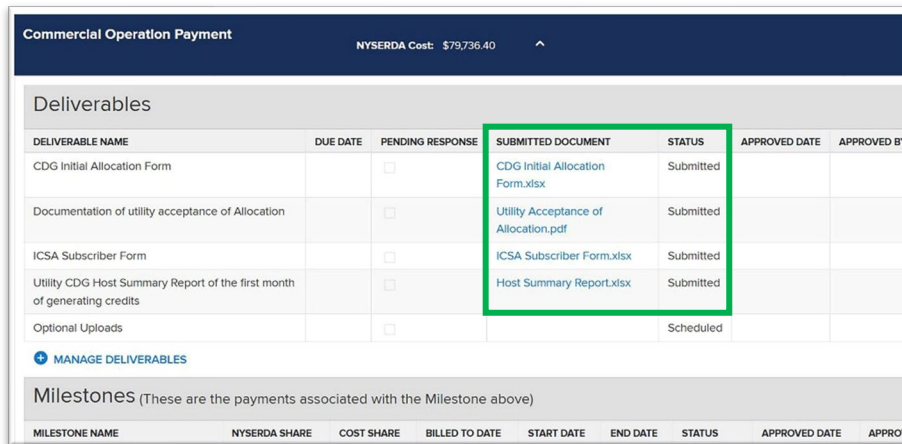
9. Click **Previous** to review the deliverables you just submitted.



DELIVERABLE NAME	DELIVERABLE STATUS	APPROVED DATE	UPLOADED DOCUMENT	DOCUMENT STATUS	ADD / UPDATE DOCUMENT
CDG Initial Allocation Form	Scheduled				Choose File No file chosen
Documentation of utility acceptance of Allocation	Scheduled				Choose File No file chosen
ICSA Subscriber Form	Scheduled				Choose File No file chosen
Utility CDG Host Summary Report of the first month of generating credits	Scheduled				Choose File No file chosen
Optional Uploads	Scheduled				Choose File No file chosen

PREVIOUS UPLOAD

10. Click the applicable milestone dropdown and ensure that the file names for each submission are correct and appear in blue under the **Submitted Document** column. In this example, the contractor will review the deliverables submitted for the Commercial Operation Payment.



DELIVERABLE NAME	DUE DATE	PENDING RESPONSE	SUBMITTED DOCUMENT	STATUS	APPROVED DATE	APPROVED BY
CDG Initial Allocation Form		<input type="checkbox"/>	CDG Initial Allocation Form.xlsx	Submitted		
Documentation of utility acceptance of Allocation		<input type="checkbox"/>	Utility Acceptance of Allocation.pdf	Submitted		
ICSA Subscriber Form		<input type="checkbox"/>	ICSA Subscriber Form.xlsx	Submitted		
Utility CDG Host Summary Report of the first month of generating credits		<input type="checkbox"/>	Host Summary Report.xlsx	Submitted		
Optional Uploads		<input type="checkbox"/>		Scheduled		

[MANAGE DELIVERABLES](#)

Milestones (These are the payments associated with the Milestone above)

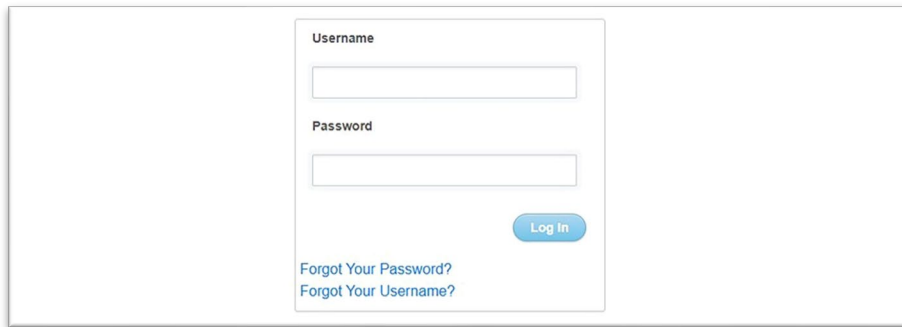
MILESTONE NAME	NYSERDA SHARE	COST SHARE	BILLED TO DATE	START DATE	END DATE	STATUS	APPROVED DATE	APPROVED BY
----------------	---------------	------------	----------------	------------	----------	--------	---------------	-------------

11. Email communitysolar@nyserderda.ny.gov to let the ICSA team know you have submitted the deliverables and a team member will review them. Please include the project's ICSA application number in the subject and body of the email. **Note:** NYSERDA may reach out for additional documents, if necessary. If additional deliverables are required, follow steps 1 through 10 to upload and submit them under **Optional Uploads**.

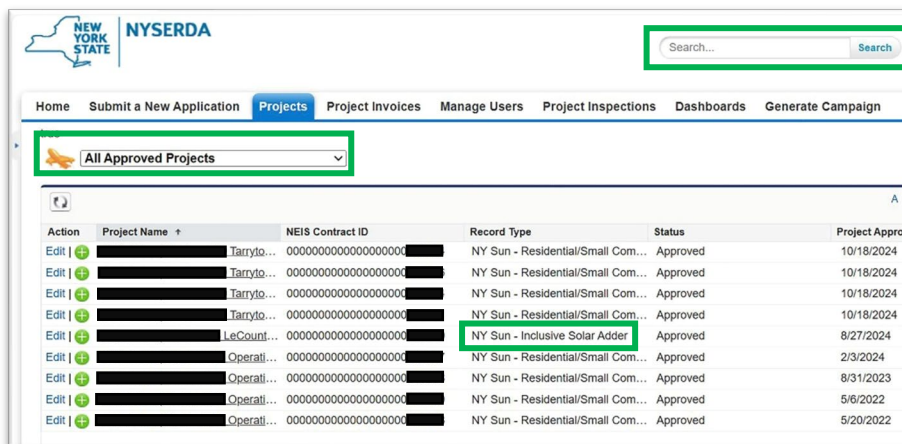
B. HOW TO SUBMIT AN INVOICE

Once NY-Sun approves all the deliverables for the milestone, the Contractor will receive an email letting them know they can submit the invoice.

1. Log into the NYSERDA Portal at <https://portal.nyserda.ny.gov/PortalLoginPage>

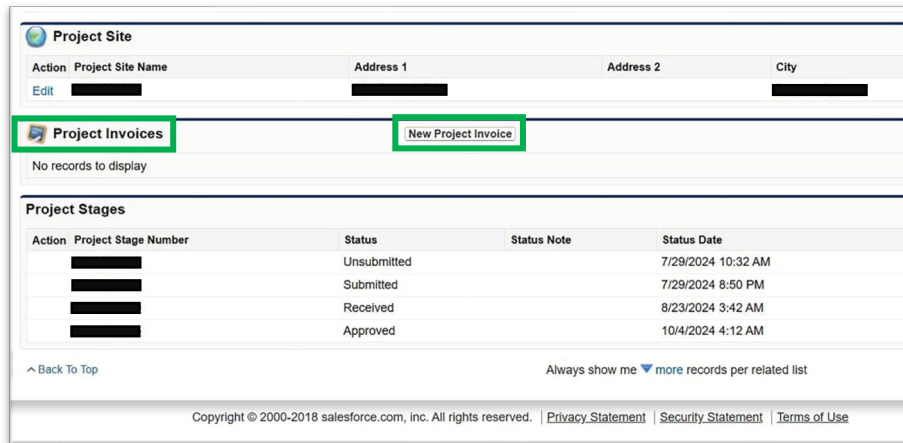


2. Search for the ICSA project you wish to submit an invoice for by using the **Search** feature or by selecting **All Approved Projects** in the list view.



Action	Project Name	NEIS Contract ID	Record Type	Status	Project Approv...
Edit +	Tarryto...	000000000000000000000000	NY Sun - Residential/Small Com...	Approved	10/18/2024
Edit +	Tarryto...	000000000000000000000000	NY Sun - Residential/Small Com...	Approved	10/18/2024
Edit +	Tarryto...	000000000000000000000000	NY Sun - Residential/Small Com...	Approved	10/18/2024
Edit +	Tarryto...	000000000000000000000000	NY Sun - Residential/Small Com...	Approved	10/18/2024
Edit +	LeCount...	000000000000000000000000	NY Sun - Inclusive Solar Adder	Approved	8/27/2024
Edit +	Operati...	000000000000000000000000	NY Sun - Residential/Small Com...	Approved	2/3/2024
Edit +	Operati...	000000000000000000000000	NY Sun - Residential/Small Com...	Approved	8/31/2023
Edit +	Operati...	000000000000000000000000	NY Sun - Residential/Small Com...	Approved	5/6/2022
Edit +	Operati...	000000000000000000000000	NY Sun - Residential/Small Com...	Approved	5/20/2022

- On the project page, scroll down to the **Project Invoices** section. Click the **New Project Invoice** button. This will direct you to the invoice submission page.



Project Site

Action	Project Site Name	Address 1	Address 2	City
Edit	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Project Invoices New Project Invoice

No records to display

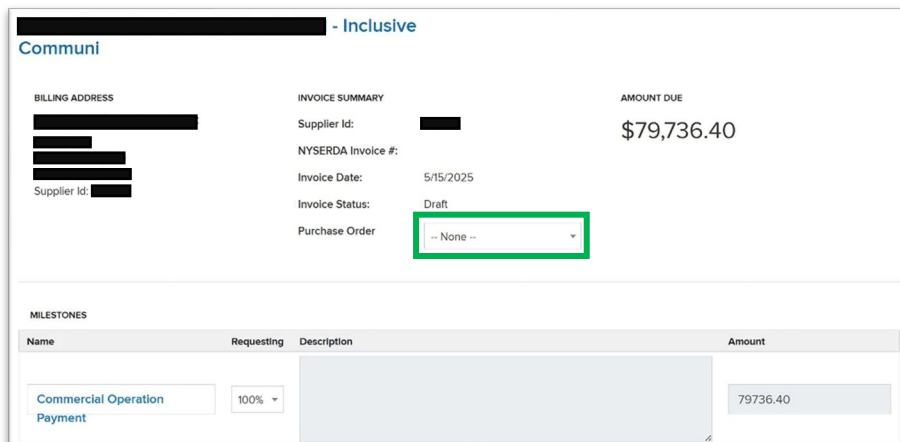
Project Stages

Action	Project Stage Number	Status	Status Note	Status Date
	[REDACTED]	Unsubmitted		7/29/2024 10:32 AM
	[REDACTED]	Submitted		7/29/2024 8:50 PM
	[REDACTED]	Received		8/23/2024 3:42 AM
	[REDACTED]	Approved		10/4/2024 4:12 AM

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- At the top of the invoice submission page, select the **Purchase Order** number from the dropdown. Most projects will have only one purchase order to choose from. If there is more than one option, please reach out to the ICSA team at communitysolar@nyserda.ny.gov. **Note:** The 100% option is auto filled in the **Requesting** column under the **Milestones** section.



[REDACTED] - Inclusive

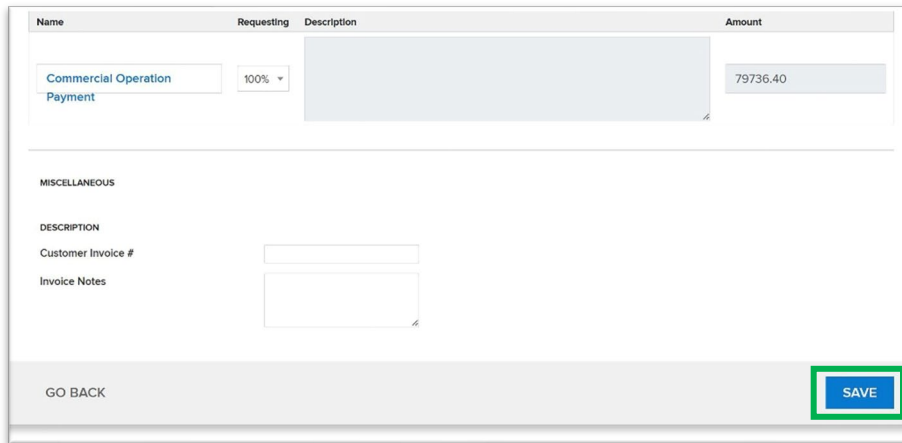
Communi

BILLING ADDRESS	INVOICE SUMMARY	AMOUNT DUE
[REDACTED]	Supplier Id: [REDACTED]	\$79,736.40
[REDACTED]	NYSERDA Invoice #: [REDACTED]	
[REDACTED]	Invoice Date: 5/15/2025	
Supplier Id: [REDACTED]	Invoice Status: Draft	
	Purchase Order: <input type="text" value="-- None --"/>	

MILESTONES

Name	Requesting	Description	Amount
Commercial Operation Payment	100%	[REDACTED]	79736.40

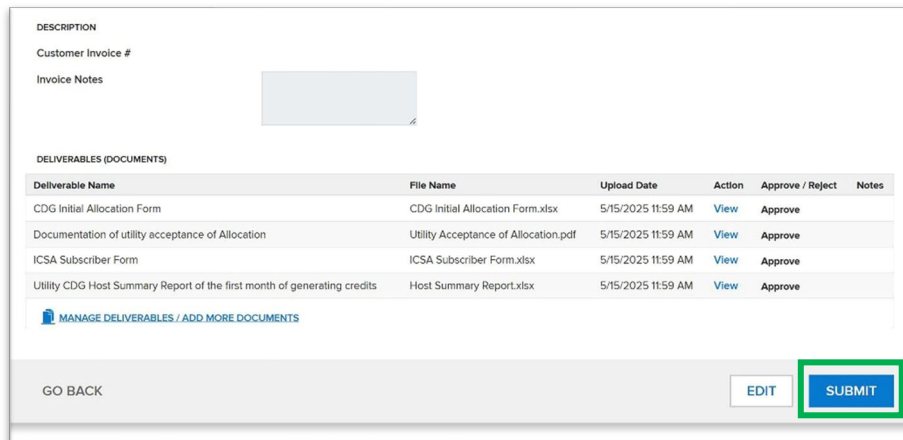
- Click the **Save** button at the bottom of the invoice submission page. **Note:** You do not have to fill out the **Customer Invoice #** or **Invoice Notes** boxes.



The screenshot shows a form with the following fields:

- Name:** Commercial Operation Payment
- Requesting:** 100%
- Description:** [Redacted]
- Amount:** 79736.40
- MISCELLANEOUS:**
- DESCRIPTION:**
- Customer Invoice #:** [Redacted]
- Invoice Notes:** [Redacted]
- Buttons:** GO BACK and SAVE (highlighted with a green box)

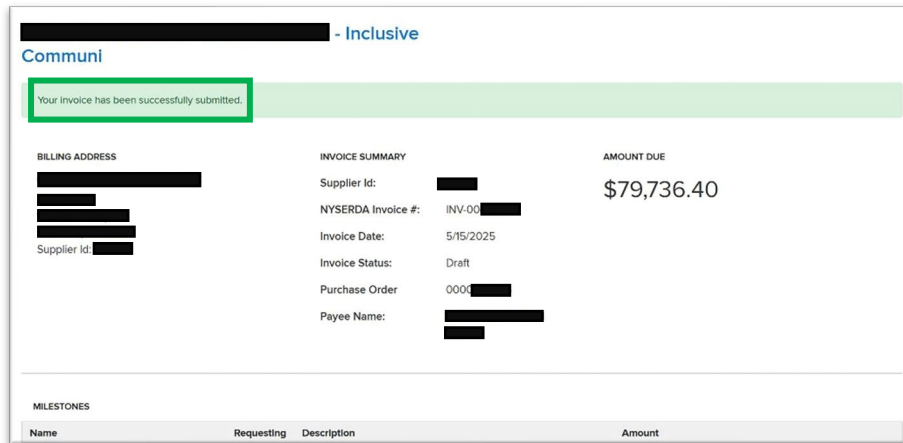
- After the updated page loads, scroll down to the bottom and press the **Submit** button.



The screenshot shows the following content:

- DESCRIPTION:**
- Customer Invoice #:** [Redacted]
- Invoice Notes:** [Redacted]
- DELIVERABLES (DOCUMENTS):**
- | Deliverable Name | File Name | Upload Date | Action | Approve / Reject | Notes |
|--|--------------------------------------|--------------------|----------------------|------------------|-------|
| CDG Initial Allocation Form | CDG Initial Allocation Form.xlsx | 5/15/2025 11:59 AM | View | Approve | |
| Documentation of utility acceptance of Allocation | Utility Acceptance of Allocation.pdf | 5/15/2025 11:59 AM | View | Approve | |
| ICSA Subscriber Form | ICSA Subscriber Form.xlsx | 5/15/2025 11:59 AM | View | Approve | |
| Utility CDG Host Summary Report of the first month of generating credits | Host Summary Report.xlsx | 5/15/2025 11:59 AM | View | Approve | |
- [MANAGE DELIVERABLES / ADD MORE DOCUMENTS](#)
- Buttons:** GO BACK, EDIT, and SUBMIT (highlighted with a green box)

- At the top of the page, ensure that a submission confirmation message appears. It should look like this:



[REDACTED] - Inclusive
Communi

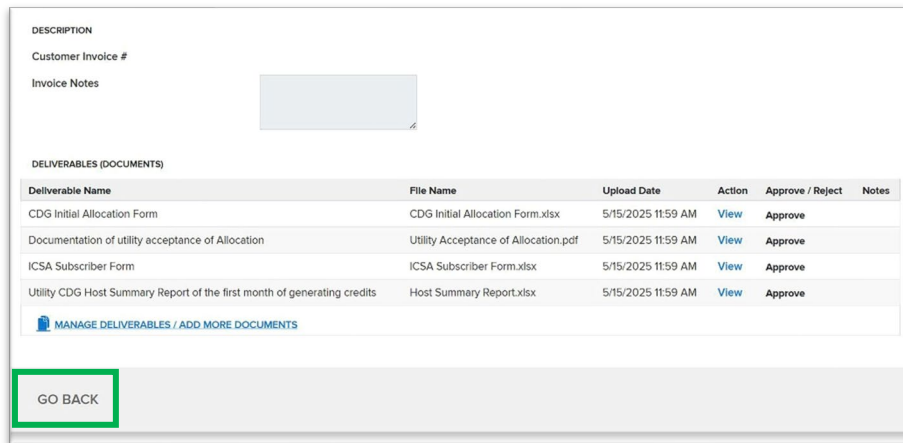
Your invoice has been successfully submitted.

BILLING ADDRESS	INVOICE SUMMARY	AMOUNT DUE
[REDACTED] [REDACTED] [REDACTED] Supplier Id: [REDACTED]	Supplier Id: [REDACTED] NYSERDA Invoice #: INV-00 [REDACTED] Invoice Date: 5/15/2025 Invoice Status: Draft Purchase Order: 0000 [REDACTED] Payee Name: [REDACTED]	\$79,736.40

MILESTONES

Name	Requesting	Description	Amount
------	------------	-------------	--------

- To view the status of your project invoice, click **Go Back** at the bottom of the page. This will redirect you to the project record.



DESCRIPTION

Customer Invoice #

Invoice Notes

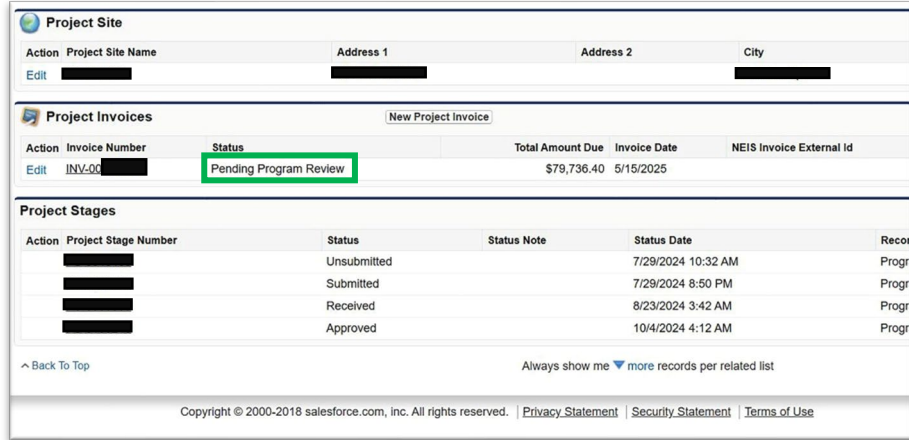
DELIVERABLES (DOCUMENTS)

Deliverable Name	File Name	Upload Date	Action	Approve / Reject	Notes
CDG Initial Allocation Form	CDG Initial Allocation Form.xlsx	5/15/2025 11:59 AM	View	Approve	
Documentation of utility acceptance of Allocation	Utility Acceptance of Allocation.pdf	5/15/2025 11:59 AM	View	Approve	
ICSA Subscriber Form	ICSA Subscriber Form.xlsx	5/15/2025 11:59 AM	View	Approve	
Utility CDG Host Summary Report of the first month of generating credits	Host Summary Report.xlsx	5/15/2025 11:59 AM	View	Approve	

[MANAGE DELIVERABLES / ADD MORE DOCUMENTS](#)

GO BACK

- On the project record, scroll down to the **Project Invoices** section. The status should indicate **Pending Program Review**. Email communitysolar@nyserda.ny.gov to let the ICSA team know you have submitted the invoice and a team member will review and process it.



Project Site

Action	Project Site Name	Address 1	Address 2	City
Edit	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Project Invoices [New Project Invoice](#)

Action	Invoice Number	Status	Total Amount Due	Invoice Date	NEIS Invoice External Id
Edit	INV-00 [REDACTED]	Pending Program Review	\$79,736.40	5/15/2025	

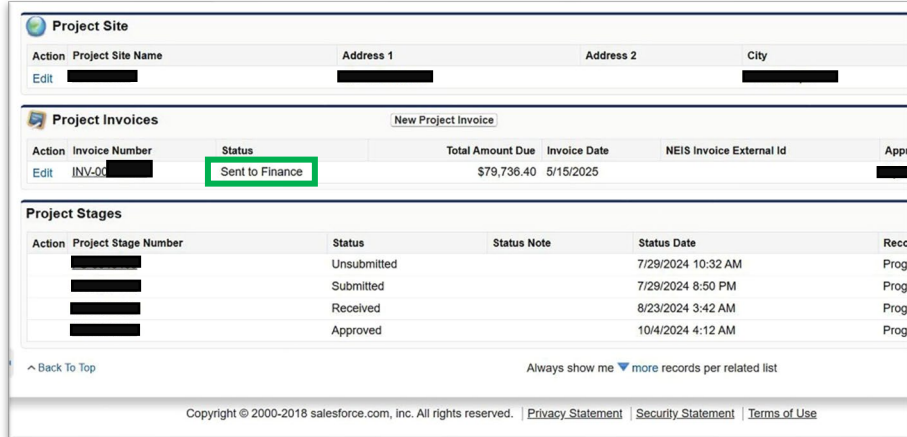
Project Stages

Action	Project Stage Number	Status	Status Note	Status Date	Recon
	[REDACTED]	Unsubmitted		7/29/2024 10:32 AM	Progr
	[REDACTED]	Submitted		7/29/2024 8:50 PM	Progr
	[REDACTED]	Received		8/23/2024 3:42 AM	Progr
	[REDACTED]	Approved		10/4/2024 4:12 AM	Progr

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- After NY-Sun approves the project invoice, the status of your project will be updated to **Sent to Finance** in the **Project Invoices** section.



Project Site

Action	Project Site Name	Address 1	Address 2	City
Edit	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Project Invoices [New Project Invoice](#)

Action	Invoice Number	Status	Total Amount Due	Invoice Date	NEIS Invoice External Id	Appr
Edit	INV-00 [REDACTED]	Sent to Finance	\$79,736.40	5/15/2025		[REDACTED]

Project Stages

Action	Project Stage Number	Status	Status Note	Status Date	Recon
	[REDACTED]	Unsubmitted		7/29/2024 10:32 AM	Progr
	[REDACTED]	Submitted		7/29/2024 8:50 PM	Progr
	[REDACTED]	Received		8/23/2024 3:42 AM	Progr
	[REDACTED]	Approved		10/4/2024 4:12 AM	Progr

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