

NYSERDA Pellet Stove Incentive Application Job Aid



Welcome to the NYSERDA Pellet Stove Incentive Application Job Aid. This document will walk you through the steps included in filling out this application.

Project Contacts (Step 1 of 7)

On this initial page you must enter all applicable contacts for your project.

Step 1	Action
1.	On Submit New Application Tab click on the Pellet Stove section.
2.	The first step is to add all pertinent contacts for the application. You must have a least one Homeowner or Installer contact type.
3.	Click "Add a Contact" toward the top right of your screen.
4.	Click the dropdown to select the " Contact Type "
5.	Select appropriate contact type.
6.	Homeowner requires only basic information.
7.	First Name, Last Name, Email, Phone
8.	While Installer requires additional information.
9.	Installer information additionally includes Company, Certification Type, ID#, and Expiration Date.
10.	Once you complete the contact information, Click the dropdown to select installer certification type.
11.	Select NFI, BPI, or CSIA.
12.	Complete the Certification ID# and Expiration Date.
13.	Once all of the fields are complete, click Save.
14.	Continue to add contacts as needed. Once you have a complete list of your project contacts, click Complete.

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Project Contacts (Step 1 of 7)

Add the Homeowner information using the "Add a Contact" button. You may also enter the Installer information if you have it at this time.

[+ ADD A CONTACT](#)

Show entries Search:

Action	Name	Email	Phone	Company Name	Contact Type
Edit Delete	Sam Riddle	siddle@gmail.com	(617) 867-5309	ABC Installation	Installer
Edit Delete	Bob Kane	bkane@gmail.com	(212) 867-5309		Homeowner
Edit Delete	Lloyd Knecht Test	chad@mbx2b.com	(456) 234-2134	Sunpower TEST	

Showing 1 to 3 of 3 entries [PREVIOUS](#) [1](#) [NEXT](#)

Step 1: Project Contacts

NYSERDA Pellet Stove Incentive Application Job Aid



Project Site Information (Step 2 of 7)

This page is where you enter your project site information. At least one project site is required.

Step 2	Action
1.	Step 2 is adding your Project Site information . You must have at least one Project Site to continue the application.
2.	To add a project site, click " Add a Site "
3.	Project Site's require an Address, City, State, Zip, & County.
4.	Once each field in complete, click Save.
5.	Once all project sites have been included, click Continue.

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Project Site Information (Step 2 of 7)

Add the address where the pellet stove will be installed.

[+ ADD A SITE](#)

Show entries Search:

Site #	Address 1	Address 2	City	State	County	
1	422 Sustainable Drive		Albany	New York	Albany	Edit Delete

Showing 1 to 1 of 1 entries

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[PREVIOUS](#) [CONTINUE](#)

Step 2: Project Site Information

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Project Incentive (Step 3 of 7)

On this page you are required to enter project incentive information, including new pellet stove general information and costs.

Step 3	Action
1.	Step 3 is adding Project Incentive information, including new pellet stove general information and costs.
2.	Select your Rebate Type from dropdown menu.
3.	Check the box if the homeowner is interested in financing.
4.	Fill in New Pellet Stove - General Information .
5.	If applicable select Vent Type.
6.	Select Pellet Source.
7.	Add Flue Age.
8.	Select Flue Type.
9.	Complete New Pellet Stove Costs (Do not use "\$" sign)
10.	Complete Recycled Equipment
11.	Select the Fuel Type
12.	Select the Unit Type
13.	Fill out the Manufacturer, Model, and Approximate Age
14.	Once complete scroll down and click continue.

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Project Incentive (Step 3 of 7)

Rebate Type

LMI No Recycle - \$2,000

Homeowner is interested in financing

New Pellet Stove - General Information

Manufacturer

New

Brand / Series:

New

Model:

New

Rated grams per hour of fine particulate matter:

0.30

Rated Efficiency:

92.00

Regional price per ton of pellets:

210.00

Home's primary system fuel type:

Wood

Home's conditioned area (square feet):

1,000.00

Percent of conditioned area (square feet) heated by stove:

Vent Type:

--None--

Pellet Source:

--None--

Flue Age (years):

Flue Type:

--None--

Step 3: Project Incentive

New Pellet Stove - Costs

Stove:

2,500.00

Venting:

500.00

Accessories

25.00

Battery Backup:

Installation:

1,000.00

Tax:

50.00

Total Project Cost:

4,075.00

Incentive Amount:

1,500.00

Net Cost:

2,575.00

Recycled Equipment

Fuel Type:

--None--

Unit Type:

--None--

Manufacturer:

Model:

Approximate Age:

PREVIOUS

SAVE

CONTINUE

Step 3: Project Incentive (contd...)

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Documents Upload (Step 4 of 7)

On this page you are required to upload your signed application as well as any Energy Finance Solutions award letter or Proforma you may have.

Step 4	Action
1.	Step 5 Documents Upload includes uploading your signed application as well as any Energy Finance Solutions award letter or Proforma you may have.
2.	Click Choose File to upload a document.
3.	Once you have uploaded your documents, click Save.
4.	Once you have saved your uploaded documents, click continue.

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Documents Upload (Step 4 of 7)

PS-71923: 1001 Home Avenue

Document Name	Add / Update Document	Recent Uploaded Document	Uploaded History	Status
Utility Bill	<input type="button" value="Browse..."/> No file selected.	test text doc.txt	Attachment History	
EFS - Income Qualification Award Letter	<input type="button" value="Browse..."/> No file selected.	test text doc.txt	Attachment History	
Signed Application	<input type="button" value="Browse..."/> No file selected.	test text doc.txt	Attachment History	

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Step 4: Documents Upload

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Application Submission (Step 5 of 7)

On this page you will simply submit your application.

Step 5	Action
1.	Step 5 Application Submission involves submitting your application.
2.	Click Submit.

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Application Submission (Step 5 of 7)

Click on the submit button below to complete this application.

PREVIOUS

DISCARD

SUBMIT

Step 5: Application Submission

On Submission the following message is displayed:

Application Status: Your application has been submitted successfully. Thank you for your submission into the Pellet Stove Program. For reference your application number is " Pellet Stove Application-00000XXXXX". Your application will be processed shortly and you will be contacted within 14 business days to notify you whether additional information is needed or if your application is complete.

Once the completed application is submitted to NYSERDA it is reviewed, and request for any additional or missing documentation is conveyed to the Contractor. Once it is reviewed and approved contractor can login to the portal to further complete Step 7 and Step 8 of the application process.

Project Completion (Step 6 of 7)

On this page you can add Installer related information.

Step 6	Action
1.	In Step 7 add Installer Information
2.	Populate Installer details including First Name, Last Name, Certification Type, ID#, and Expiration Date, and click continue.

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Project Completion (Step 6 of 7)

Installer Information

First Name: Last Name:

Certification Type: Certification ID:

Certification Expiration Date:

PREVIOUS

CONTINUE

Step 6: Project Completion

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Final Step 7 – Invoice and Deliverables

Step 7	Action
1.	In Step 7 contractor is provided with Invoice Summary Details
2.	Deliverables including Certification of Completion and Recycling Receipt can be uploaded in this step by clicking on “Manage Deliverables”
3.	“Browse” for each deliverable and upload to the system by clicking “Save”
4.	The user will be taken back to the Invoice screen where they can click “Submit” to formally submit the payment request.
5.	A confirmation that the payment request has been submitted will be displayed.

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Susan Hill - 423 Sustainable Drive - Pellet Stove

[EDIT](#)

BILLING ADDRESS

Sunpower TEST
Lloyd Knecht Test
Test LK
Albany, Albany 12205

INVOICE SUMMARY

NYSERDA Invoice #: INV-00059934
Invoice Date: 2/27/2017
Invoice Status: Draft

AMOUNT DUE

\$1,500.00

MILESTONES

Name	Description	Amount
Project Completion		\$1,500.00

INVOICE NOTES

DELIVERABLES (DOCUMENTS)

Deliverable Name	File Name	Upload Date	Action	Approve / Reject	Notes
Certificate of Completion	Visit the Manage Deliverables page to add this file.	-	-		
Recycling Receipt	Visit the Manage Deliverables page to add this file.	-	-		

[MANAGE DELIVERABLES](#)

[SUBMIT](#)

Step 7: Invoice Summary

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Dave Homeowner - 1001 Home Avenue - Pellet Stove

PROJECT COMPLETION - DELIVERABLES (DOCUMENTS)

Deliverable name	Recent uploaded document	Upload history	Status	Add / update document
Certificate of Completion		Attachment History	Scheduled	<input type="button" value="Browse..."/> No file selected.
Recycling Receipt		Attachment History	Unsubmitted	<input type="button" value="Browse..."/> No file selected.

PREVIOUS

SAVE

Step 8: Manage Deliverables

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Susan Hill - 423 Sustainable Drive - Pellet Stove

EDIT

BILLING ADDRESS

Sunpower TEST
Lloyd Knecht Test
Test LK
Albany, Albany 12205

INVOICE SUMMARY

NYSERDA Invoice #: INV-00059934
Invoice Date: 2/27/2017
Invoice Status: Draft

AMOUNT DUE

\$1,500.00

MILESTONES

Name	Description	Amount
Project Completion		\$1,500.00

INVOICE NOTES

DELIVERABLES (DOCUMENTS)

Deliverable Name	File Name	Upload Date	Action	Approve / Reject	Notes
Certificate of Completion	Test PDF Document.pdf	2/27/2017 5:28 PM	View		
Recycling Receipt	Test PDF Document.pdf	2/27/2017 5:28 PM	View		

[MANAGE DELIVERABLES](#)

SUBMIT

Step 7: Submit Payment Request

Pellet Stove



Final Deliverables (Step 7 of 7)

Thank you for submitting final deliverables. Your [payment request](#) has been submitted.

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Step 7: Payment Request Submitted Successfully