

September Conference Call– Talking Points

September 6, 2016

NY-Sun Solar PV Incentive Program

Program Update

- PC closed as of 8/31. You will not be able to log in to see old projects. SF opens 9/8. The SF sandbox has also closed.
- You will be emailed logins and a link to the live portal before 8AM on the 8th. This will be sent to the same person that received the log-in to the Salesforce Sandbox.
- If you have questions or difficulties accessing Salesforce on the 8th, email pvprocessing@nyserda.ny.gov
- All Projects in Powerclerk, and all of their information, are transferring to Salesforce. If you had a project in Salesforce in “Received” status on August 31, it will be in Salesforce in “Received” status on Sept 8. The only exception is Un-submitted projects. As discussed in an earlier announcement, Un-submitted projects are not migrating over.
- A word about navigating in Salesforce. There is a search bar where you can look up your projects by customer name, customer address, or the legacy Powerclerk project number. There are also a series of “list views”. This involves a drop-down menu with options including “all approved projects” and “all completed” projects. If you are having trouble finding one of your projects, try the search bar and the list views.
- If you don’t think you’ve been receiving program announcements and updates, please check your email’s spam folder. If you still don’t see the missing announcements you can add yourself by going to the Announcements section of the NY-Sun website, <https://www.nyserda.ny.gov/All-Programs/Programs/NY-Sun/About/Email-Updates>. You can also contact program staff, and we will add you.
- Certain other states are still using Powerclerk for their programs – this isn’t changing. The current switch to Salesforce applies to NY-Sun only. Some other NYSERDA programs, such as Solar Thermal, are not moving to Salesforce at this time.
- Program staff is working busily to run this program. If you call us and we don’t pick up, we are probably at a meeting or on the phone with someone else. Leave a message and we will call you back, or send us an email. Please do not call multiple people and not leave a message!

GJGNY Updates - New interest rates are now in effect. Interest rates are tied to customer’s income level – 3.49% for low-to-moderate income customers, several tiers of higher rates for all others. New proforma is posted on website. It has an orange background. When using it, please select the correct interest rate from the drop-down menu, matching the customer’s interest rate on the preapproval. Financing applications (the credit checks) that were sent to EFS before September 1, 2016, will receive the old interest rates of 3.49%.

Processes - New process documents are located on NY-Sun website. These include step-by-step walkthroughs for the following processes:

- [NY Sun Contractor Application](#) [PDF]
- [NY Sun Contractor-Builder Relationship](#) [PDF]
- [NY Sun Res-SC Application](#) [PDF]
- [NY Sun C-I Incentive Application](#) [PDF]
- [NY Sun Res-SC GJGNY Loan](#) [PDF]
- [NY Sun Res-SC and C-I Change Modification Request](#) [PDF]
- [NY Sun Res-SC and C-I Project Invoice](#) [PDF]

We recommend printing out copies and putting them in a binder for your admin staff. Other documents, including the Program Manual, will be updated in the next few days and posted to the website. Please also remember there is a new participation agreement and addendum posted to website. As a reminder, the addendum needs to be part of each incentive application package and signed by the customer.

Customer Signatures are also required on certain documents.

<i>Required Signatures</i>		
Program Document	Contractor/Builder	Customer
Project Application	No	Yes
Project Modification Request (Only if funding change)	No	Yes
Project Invoice	No	Yes
Cancellation Request	No	No
Extension Form	No	No

There is also a FAQ section which will be continuously updated. We encourage you to read through this thoroughly prior to contacting NYSERDA staff to see if your question has already been addressed.

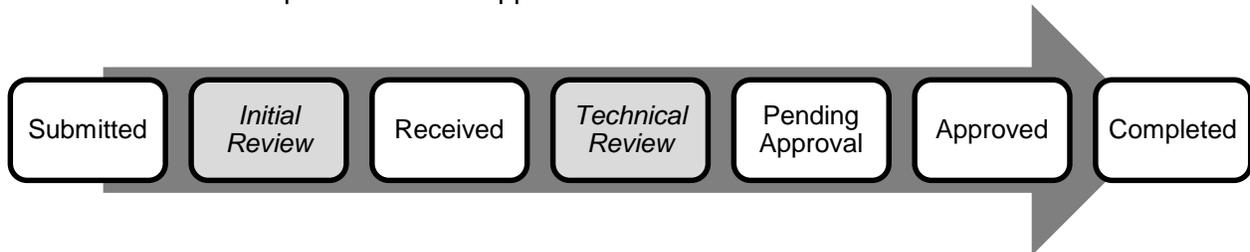
The main changes from PowerClerk to SF is your ability to submit invoices, change requests, extensions and cancellations. You will now be able to submit these documents directly into SF. The only item you will still need to send to a mailbox is IF you are requesting early release of your loan prior to final signoff by utility. This process is outlined clearly in Reference Guide labeled NY Sun Res-SC GJGNY Loan.

As a reminder, projects which are financing only are not eligible to request early loan release.

- Form location – Contractor Resources section of website
- Submit to pvforms@nyserda.ny.gov or pvformsLI@pseg.com

Salesforce Status

As mentioned previously, all projects which were in PowerClerk as of 8/31/16 will be listed under your projects tab view in Salesforce. The majority of projects migrated in the same status but a few statuses have been removed such as pre-encumbered, Approved-GJGNY and a few others. These projects were changed to the new corresponding status in SF. There are a total of five (5) status in SF. As an example, Approved-GJGNY is now in Approved Status in SF but there is a checkbox indicating release of loans has been approved. A Project Application will progress through the following status in the NYSERDA Portal until your system is installed and final incentive request has been approved.



If you already had old change order forms and invoice request forms signed by customers, you are permitted to submit through Salesforce **for the next 30 days or until October 10, 2016**. After October 10, all forms will need to be generated through Salesforce; failure to do so will result in your requests to be rejected.

Old Forms

As a reminder: If using the old forms signed by the customer prior to 9/8/16, you will need to “walk through” the submission process in SF. When you get to the upload screen of your request you will need to upload the signed form from the customer in place of the SF generated form.

You will also be uploading all the required documents associated with the requests. For incentive requests, instead of the older process of uploading electrical inspection, sign-off by utility, etc., in a single pdf, **you will now be uploading these documents as single files**.

SF Features

Logic has been built into Salesforce to provide automatic checks and safeguards. For instance, contractors are not able to submit an invoice on a project if there is a change order currently being processed, and projects cannot have multiple change orders under review at a given time. Therefore, you will need to wait to submit your incentive invoice until after any change order has been submitted.

Another feature of SF is that the automated forms for changes and incentive requests will auto-populate with the NYSERDA approved equipment, incentive amount and purchase order information. All you will need to do is review to ensure accuracy and obtain customer signature as necessary. When reviewing the auto-generated incentive request (incentive invoice) you will be able to select either 75%, 25% or 100% and the amount will auto-calculate. It is important that you review prior to submission because if you have made a change from the previously approved system, you must submit the change order PRIOR to submitting the incentive request form. Failure to do so will result in delays and possible Correction notices from QA if system is inspected and found to be inaccurate. These safeguards are meant to reduce errors.

Quick reminder about Relationships

There are currently only 35 relationships created in the sandbox. Which means if you are not one of the 35 who established relationships in the sandbox then you will not be able to submit project applications until the relationships are established. If you established or requested a relationship in the sandbox, this will carry over to SF.

Example, I own ABC Solar and I am working with SunPower. I want to have SunPower as the contractor on a project and have ABC be the builder. When entering the project into Salesforce, I should select SunPower as the contractor and ABC Solar as the Builder.

In order to do so, there must first be a relationship between ABC Solar and SunPower in Salesforce. To do this, go to the "Relationships tab" and search for SunPower. You can send them a request to establish a business relationship – both parties will sign it, and then the relationship will be automatically established in Salesforce. Remember you will only be able to establish relationships with Contractors and/or Builders who have been approved by NYSERDA.

We are all diligently working on all Invoicing and Change requests submitted up to 8/31 to the mailboxes. Please do not re-submit these invoices unless specifically instructed to do so to avoid duplicate requests and delays in processing.

Again as a reminder, if you have questions or difficulties accessing Salesforce on the 8th, email pvprocessing@nyserda.ny.gov or if you have any specific program/process questions reach out to us and we will make every effort to get back to you as quickly as possible.