

Contractor Application Reference Guide

NY-Sun Contractor Application

Welcome to the NYSERDA NY-Sun Program Contractor Application Reference Guide. This document will walk you through the steps required to complete this online application.

Select Program

The initial page requires you to select the program to which you are applying and identify your role in filling out this application.

Step	Action
1.	Beginning on the "Select Program" page, click on the dropdown menu under "Program Family".
2.	Select NY Sun from the dropdown menu.
3.	If you are applying to work with NY-Sun - Residential/ Small Commercial Program, click the button next to that program.
4.	Then select your role in the Residential/Small Commercial Program, which will be either Contractor, Builder, or Both
5.	If you are applying to work with NY-Sun - Commercial and Industrial Program, click the button next to that program.
6.	If you are applying to work with the NY-Sun - Residential/ Small Commercial and Commercial and Industrial Program, click the button next to both.
7.	Then select your role in the Residential/Small Commercial Program, which will be either Contractor, Builder, or Both.
8.	Once you have completed selecting your Program and Role (if applicable), click "Continue".

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Select Program

Program Family 

NY Sun 

Please select a program

- NY-Sun - Residential/Small Commercial
- NY-Sun - Commercial and Industrial
- Both

Please select your role in the Residential / Small Commercial Program

- Contractor
- Builder

CONTINUE

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Company Information (Step 1 of 7)

On this page you will need to enter your company information, including name(s), tax exemptions, and tax identifications.

Step	Action
1.	Step 1 is entering your Company Information.
2.	Enter your "Legal Business Name".
3.	Enter any applicable "Business Name/ Disregarded Entity Name".
4.	Enter your "Street Address".
5.	Enter your "City".
6.	Select your "State/Province".
7.	Enter your "Zip Code".
8.	Click the dropdown menu under "Entity Type".
9.	Click on your businesses' entity type(s).
10.	If applicable, select your Minority or Woman Owned Business Enterprise (MWBE) designation.
11.	If you selected a Business Enterprise, enter your NYS MWBE number.
12.	If applicable, enter your Exempt Payee code.
13.	Select your Tax Identification type. If you are using your Social Security Number, click the button and follow the instructions on the page to submit a W-9 form separately.
14.	If you are using your Employee Identification Number, click the button.
15.	Enter your Employee Identification Number.
16.	Once you have entered all of your Company Information, click "Continue".

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Company Information (Step 1 of 7)

Legal Business Name

ABC Energy Co.



Business Name / Disregarded Entity Name

Abco



Street Address

421 Sustainable Drive



City

Albany

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State/Province

New York

Zip Code

01235

Entity Type (select all that apply)

x Corporation



Please Select if Applicable (check all that apply)

- New York State Minority Owned Business Enterprise
- New York State Women Owned Business Enterprise
- New York State Veteran Owned Business Enterprise

NYS MWBE

2158975365



Exempt Payee Code



Tax identification type:

- Employee Identification Number (EIN)
- SSN

Employee Identification Number (EIN)

57-5689557

Your Employer Identification Number (EIN) is not your Social Security Number.

Please see the instruction provided by the IRS on the "Form W-9" for a detailed description on where to find your EIN here:

<http://www.irs.gov/Forms-&-Pubs>

CONTINUE

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Contact Information (Step 2 of 7)

On this page you will need to enter the contact information for the primary contact, and if different, your accounts receivable and authorized signatory contacts.

Step	Action
1.	Step 2 is entering your organizations Primary, Accounts Receivable, and Authorized Signatory Contact Information.
2.	Start by entering your "Primary Contact Information". The "Primary Contact" is the person who makes the legal or business decisions for the organization. The information includes First Name, Last Name, Title, Email, Phone, and Extension Number, if applicable, for the Primary Contact.
3.	If the Accounts Receivable Contact is the same as the Primary Contact, Click the box.
4.	If the Accounts Receivable Contact is different from the Primary Contact, enter the First Name, Last Name, Title, Email, Phone, and Extension for the Accounts Receivable Contact.
5.	Repeat this process for the Authorizing Signatory Contact.
6.	Once all Contact Information is complete, click Continue.

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Contact Information (Step 2 of 7)

Primary Contact Information ?

First Name	Last Name
<input type="text"/>	<input type="text"/>
Title	Email
<input type="text"/>	<input type="text"/>
Phone	Extension
<input type="text"/>	<input type="text"/>

Accounts Receivable Contact ?

Accounts Receivable Contact is same as primary

Authorized Signatory Contact Information ?

Authorized Signatory contact is same as primary

Qualifications (Step 3 of 7)

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On this page you will enter your company’s qualifications, including PV industry experience, and credentials (if applicable).

Step	Action
7.	Step 3 is entering your organizations "Qualifications".
8.	Enter the number of years your company has worked in the PV industry.
9.	Enter the number of solar projects your company has completed.
10.	If your company has participated in other state solar programs, Click the box.
11.	Then enter the states that your company has participated in.
12.	If applicable - If your company has at least one individual who holds one of the listed credentials, Click the box.
13.	Then check the box for the certification that the individual in your company holds.
14.	Once you have filled out all applicable qualification fields, Click "Continue".

NYSERDA - NY-Sun Qualifications (Step 3 of 7)

Number of years your company has worked in PV industry

Number of solar projects your company has completed

Has your company participated in other state solar programs?

What other states?

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References (Step 4 of 7)

On this page you will include contact and project information for references regarding your previous PV industry projects.

Step	Action
1.	Step 4 is entering "References" from your organization's previous projects. If you are only applying for Residential/Small Commercial and not Commercial/Industrial, or vice versa, you will only need to enter references for that area.
2.	For the "Residential/Small Commercial References", Click on the downward arrow to the right of each Reference to enter the required information.
3.	Complete each field in the "Contact Information" and continue to scroll down.
4.	Complete each field in the "Project Information" and continue to scroll down.
5.	Complete this process for each of the 3 "Residential/Small Commercial References".
6.	For "Commercial References", EITHER click the button to provide a hyperlink to an installed project (and proceed to step 7) OR click the button to provide three project references (and proceed to step 8).
7.	Enter the hyperlink.
8.	Complete each field in the "Contact Information" and continue to scroll down.
9.	Complete each field in the "Project Information".
10.	Complete this process for each of the 3 "Commercial References".
11.	Once you have completed EITHER step 7 above OR steps 8-10 above, click "Continue".

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References (Step 4 of 7)

Residential/Small Commercial References

Reference 1 of 3

Contact Information

First Name	Last Name
<input type="text" value="Phil"/>	<input type="text" value="Workman"/>
Project Site Address	City
<input type="text" value="54 Hilltop Ave"/>	<input type="text" value="Albany"/>
State/Province	Zip
<input type="text" value="NY"/>	<input type="text" value="01245"/>
Phone Number	Email Address
<input type="text" value="(578) 968-5698"/>	<input type="text" value="pworkman@htp.com"/>

Project Information

System Size(kW)	Interconnection Date
<input type="text" value="1500"/>	<input type="text" value="1/1/2016"/> [8/5/2016]

Applicant's role in project

 ⓘ

Project Description

 ⓘ

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Commercial References

I'd like to provide

A hyperlink to an installed project from the Commercial / Industrial Program at chp.nyserda.org

Three project references (Totalling greater or equal to 500kW)

PREVIOUS
SAVE
CONTINUE

Certification and Submission (Step 5 of 7)

On this page you are required to answer several questions and can use an electronic signature to sign the application before submitting. You will also have the option to print, sign, and scan signed application.

Step	Action
1.	Step 5 is "Certification and Submission" of your application. Before submitting, review all information carefully to avoid delay or denial of your application.
2.	Read each certification question carefully and Click the button next to "Yes" or "No", and continue to scroll down.
3.	Next Click each box to acknowledge that you have reviewed the accompanying document.
4.	To sign the application, Click "Electronic Signature", which will temporarily direct you to the secure DocuSign website. If you choose to print, sign, and scan signed application, you can proceed by clicking 'Continue'.
5.	On the DocuSign website, start by reviewing the disclosure, then Click the box to agree to use electronic records and signatures.
6.	To begin reviewing your application Click "Continue".
7.	Once you have finished reviewing your application, Click "Sign".

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8.	DocuSign will then populate your name and choose a signature style. Make and changes you need to, then Click "Adopt and Sign".
9.	Once you have completed your Electronic Signature, Click "Finish". You then be directed back to your NY Sun Contractor Application.
10.	At this point you should see a bar at the top of the page indicating that the "Application is signed".
11.	Scroll down to the bottom of the page and you will see today's date populated now that the application is signed.
12.	From this screen you may Click "Print" to print your application.
13.	Once you have completed reviewing, certification, and signing your application, Click "Continue".

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Certification and Submission (Step 5 of 7)

Please review all application information carefully and ensure that all required documentation is complete before continuing. Incomplete applications may result in prolonged processing and potential denial of participation in the NY-Sun Incentive Program.

Has your company filed or are you filing a petition under any chapter of the U.S. bankruptcy code during the past 3 years

Yes No

Have any principal or officer of your company been convicted of a felony within the past 5 years?

Yes No

Have any principal or officer of your company been under disciplinary action (probation, suspension, and termination) within a NYSERDA program?

Yes No

Have any principal or officer of your company been debarred by any government agency?

Yes No

Please review the NY Program Manual(s) and the Participation Agreement provided below. Check each box to acknowledge that you have reviewed the accompanying document.

- [PV Program Manual – Commercial/Industrial \(>200kW\)](#)
- [NY-Sun Incentive Program – Participation Agreement](#)
- [PV Program Manual – Residential/Small Commercial \(<200kW\)](#)

I certify that all information provided in this Form, including any attachments, is true and correct to the best of my knowledge. I agree to provide any additional materials NYSERDA may ask for during the review process. I have also reviewed and agree to the terms and conditions set forth in the PV Program Manual(s) and the NY-Sun Incentive Program - Participation Agreement provided in the links above.

ELECTRONIC SIGNATURE

Date:

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Paperwork Record (Step 6 of 7)

On this page you will attach required documents related to your application as well as any other related paperwork.

Step	Action
1.	Step 6 is attaching all required "Paperwork Records".
2.	The "Required Documents" will be based on your application type. If you have already used DocuSign to sign your application, it will upload to this page automatically.
3.	Click "Choose File" to attach each "Required Document".
4.	Once you have included all of the "Required Documents", you may add any other applicable documents. Click the "Document Name" text box to enter the name.
5.	Click "Choose File" to attach the document.
6.	You may Click "Save" and return to this page at a later time.
7.	Once you have completed attaching all of your "Paperwork Records", Click "Continue".

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Paperwork Record (Step 6 of 7)

Required Documents				
Document Name	Recent Uploaded Document	Upload History	Status	Add / Update Document
Certificate of Insurance				<input type="button" value="Choose File"/> No file chosen 
Signed Application				<input type="button" value="Choose File"/> No file chosen 

Other Documents				
Document Name	Add / Update Document	Recent Uploaded Document	Upload History	Status
<input type="text" value="Document Name"/>	<input type="button" value="Choose File"/> No file chosen			x
+ ADD ANOTHER DOCUMENT				

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Submission Confirmation (Step 7 of 7)

On this page you will formally submit your application. No changes can be made once your application has been submitted.

Step	Action
1.	Once you have completed and reviewed your application, click "Submit".

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Submission Confirmation (Step 7 of 7)

Application current status: Unsubmitted

Please click on submit button below to complete this application.

PREVIOUS
SUBMIT