



## NYSERDA – Solicitation User Guide

---

January 2018

# NYSERDA Solicitation User Guide

<b>Access</b>	To submit or edit a concept paper/proposal: Access the NYSERDA Portal directly from the “current funding opportunities” link on the NYSERDA Website. You must click the “apply online” link for the specific solicitation for which you are applying/proposing to. Please note that your username is your email followed by .nyserda (for example, <a href="mailto:jsmith@gmail.com.nyserda">jsmith@gmail.com.nyserda</a> ). You must include .nyserda or you will not be able to login to the system.
<b>Questions</b>	Contact Jillina Baxter (at <a href="mailto:Jillina.Baxter@nyserda.ny.gov">Jillina.Baxter@nyserda.ny.gov</a> or 518-862-1090 ext. 3418) or the Program contact listed in the solicitation for proposal submission questions.

## Table of Contents

1. Getting Started	3
2. Account Registration	5
3. Action Boxes, Help Text, Required Fields, & Application Number	7
4. Contact Information	9
5. Site Information (If Site specific information is required by Solicitation)	11
6. Proposal Information / Concept Paper Information	13
7. Proposal Budget / Concept Paper Budget	15
8. Proposal Documents / Concept Paper Documents	16
9. Authorized Signature and Certification	17
10. Proposal Submission / Concept Paper Submission	19
11. How do I access the NYSERDA Portal to complete registration, finish or update my proposal/concept paper, submit another proposal?	21
12. Invitation to submit a proposal after a concept paper is approved	24
13. Troubleshooting	27
14. Tips to Optimize Large File Size	28
15. Requirements for Paper Submission	29

# NYSERDA Solicitation User Guide

## 1. Getting Started

**Please read the following requirements before submitting an electronic proposal.**

1. Before you begin, ensure you are using a recent browser version for Chrome, Firefox, or Internet Explorer (IE 11 or higher). For more information on supported browsers visit the [Supported browsers for Salesforce](#) webpage.
2. All Users will need a NYSERDA Portal account.
  - Login with your NYSERDA Portal Username & Password credentials, or create an account if you do not have already have one (see page 4 for additional details on creating an account).
  - Once registered, check your email for the auto-generated NYSERDA Portal Welcome email, and your assigned username to log back into the system.
  - Autogenerated emails will be from NYSERDA No Reply. Please add [noreply@salesforce.com](mailto:noreply@salesforce.com) and [no-reply@nyserda.ny.gov](mailto:no-reply@nyserda.ny.gov) to your contact/address book to ensure that these emails do not go to a junk folder or get marked as spam.
3. You will be prompted to upload required files as part of the submission process.
  - Once submitted, files may be replaced until the due date at 5pm Eastern Time on the due date of the solicitation.
  - **The electronic proposal system closes promptly at 5pm Eastern Time on the due date of the solicitation.** Files in process or attempted for submission after 5pm will be locked out of the system and not accepted.
  - **It is strongly suggested that you start the process early, input your information, all required documents and submit well before the deadline.** Any final edits/replacements may be made up until the deadline at 5pm Eastern Time on the due date of the solicitation.
4. The electronic file names should include the proposing entity's name in the title of the document.
  - **Note:** There is an 80-character limit.
5. You may submit Word, Excel, or PDF files (file formats can include csv, doc, docx, gif, jpeg, jpg, pdf, png, ppt, pptx, pps, ppsx, tif, txt, xls, xlsx, and zip). Individual files should be 100MB or lesser in file size.
6. PDF files must be searchable and therefore should be converted directly from an electronic document to PDF. Files should not be scanned.
7. After the necessary files have been uploaded, the "Authorized Signature and Certification" page will summarize all the information that you have entered. Review the information to ensure that your proposal is complete and accurate
8. When you have completed all steps of your submission, click the "Submit" Button.
9. After submitting, you will see a green text box noting that your proposal has successfully been submitted. You will also receive an auto-generated confirmation of submission e-mail that will be sent to the e-mail address you entered. Please save this e-mail to confirm submission. *If you do not receive an email, double check the email address that you entered.*

# NYSERDA Solicitation User Guide

---

## Important Reminders:

All proposals must be received by 5pm Eastern Time on the date noted in the solicitation. Late, faxed, or emailed proposals will not be accepted. **Incomplete proposals may be subject to disqualification. It is the proposer's responsibility to ensure that all pages have been included in the proposal.**

**Please note: for online submission, there are required questions that you will have to answer in addition to uploading attachments and you should allot at least 60 minutes to enter/submit proposals. The electronic proposal system closes promptly at 5pm, files in process, attempted edits, or submission after 5pm Eastern Time, on the date stated on the solicitation, will not be accepted.**

Review the solicitation description and associated documents of current funding opportunities available.

**To begin the proposal/concept paper submission process, select the appropriate solicitation (from the NYSERDA current funding opportunities page) and click link to the apply online.**

- Login with your NYSERDA Portal Username & Password credentials (if you have previously created an account your username is your email followed by “. nyserda” (for example [jsmith@gmail.com.nyserda](mailto:jsmith@gmail.com.nyserda)) You must include the “.nyserda” or you will not be able to login to the system.
- Or create an account if you do not have already have one (see next pages for details).

# NYSERDA Solicitation User Guide

## 2.Account Registration

- If you already have a NYSERDA Portal account, please navigate to [nyserda.ny.gov](http://nyserda.ny.gov) – funding opportunities – Current funding opportunities – click on the solicitation for which you would like to propose/apply. Then click apply online.
- If you do NOT have a NYSERDA Portal account: click on “Create an Account” to go to the “NYSERDA - Portal Registration” page.

**NYSERDA**

PORTAL LOGIN

Returning Users: The Username for the proposal submission system is your email address followed by “.nyserda”. For example, [jsmith@abc.com.nyserda](mailto:jsmith@abc.com.nyserda) . You must include the “.nyserda” or you will not be able to login to the system.

**Login to NYSERDA Portal**

Username

Password

**LOGIN**

Not registered? [Create an account](#)

[Forgot Password?](#)

## NYSERDA Solicitation User Guide

- Input your “Company Information” and “Contact Information” in the sections provided, and complete all the mandatory fields (marked with an \* asterisk symbol).
- Create and Confirm your password.
- Click the “CREATE” button to register your account.
- You will receive portal registration confirmation via email (at the email address you entered in the contact section).

**NYSERDA - Portal Registration**

Register with NYSERDA's application portal.

**Company Information**

Company Name \*      Address 1 \*  
     

Address 2      City \*  
     

State \*      Zip \*  
--None--     

**Contact Information**

First Name \*      Last Name \*  
     

Title \*      Email \*  
     

Phone \*

**Password Information**

Password \*      Confirm Password \*  
     

**CREATE**

# NYSERDA Solicitation User Guide

---

## 3. Action Boxes, Help Text, Required Fields, Application Number

### Action Boxes:

Blue Action box contains text specifying user action required

Green Action box contains text notifying user success in specified application step

Red Action box contains text for any application errors that need to be corrected by user

- **Help Text:** Clicking on the question mark '?' symbol available next to selected fields expands guidance text as shown in the example below
- **Required fields:** Information is mandatorily required in any fields marked with a red asterisk (See example below for Company Name \*)

**ADD A CONTACT**

Alternate Party

Company Name \*

First Name \*

Last Name \*

The Company Name and Tax Identification Number (TIN) must match the information provided to the Internal Revenue Service (IRS). Please confirm that the information provided here is identical to the company's W-9 as submitted to the IRS.

# NYSERDA Solicitation User Guide

When you begin the submission process, an application number will be generated and displayed at the top left section of the page. The application number will be helpful if you have issues prior to submitting your proposal/concept paper.

Use the page markers (circles at the top right of the page) to return to a previous page at any point in the submission process.



Sandbox: UAT  
Search... Search  
Clark Kent ▾

- Home
- Projects
- Project Invoices
- Dashboards
- Manage Users

Application Number: 0000101478



## Multi Round Solicitation

### Proposer Contact Information (Step 1 of 6)

Click "ADD A CONTACT" to provide information on contacts who will be involved in the proposed project.

+ ADD A CONTACT

Action	Name	Email	Phone	Company Name	Primary
--------	------	-------	-------	--------------	---------



## 4. Contact Information

- On the Proposal/Concept Paper Contact information page:
  - **You must have at least one “Primary Contact”.**
    - You will be required to enter a Primary Contact for each proposal that you submit.
    - Please note: **All notifications and correspondence will be sent to the e-mail address of the Primary Contact** (ex. confirmation of submission e-mail, award/non-award notification letter).
  - You can optionally add contacts, and mark them as “Alternate Party”
  - **Create a New Contact:** Click “ADD A CONTACT” for each new contact if applicable
  - **Edit an Existing Contact:** To edit current contact information, click “Edit” beside the contact name
  - Input information in all mandatory fields and click “SAVE CHANGES” to update Contact Information.
- Click “CONTINUE” if there are no changes or once all proposal contacts have been added or edited as applicable.

Home Projects Project Invoices Dashboards Manage Users

Application Number: 0000101478

### Multi Round Solicitation

Proposer Contact Information (Step 1 of 6)

Click “ADD A CONTACT” to provide information on contacts who will be involved in the proposed project.

Action	Name	Email	Phone	Company Name	Primary
<a href="#">Edit</a> <a href="#">Clone</a>	Clark Kent	superman@gmail.com	(518) 862-1090	Krypton	Yes

[ADD A CONTACT](#)

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

# NYSERDA Solicitation User Guide

Select alternate party or primary contact.

Alternate Party

Company Name \*



First Name \*

Last Name \*

Title

Email \*

Phone \*



Primary Contact

Address 1 \*

Address 2

City \*

State \*

Zip \*

DUNS Number



Tax identification type \*

Employer Identification Number (EIN)

SSN

**Do not submit a Social Security Number to NYSERDA on this form.**

If, in accordance with the rules on IRS Form-W9, your taxpayer identification number is a Social Security Number, complete all other information on this form and leave Employer Identification Number blank. In addition, mail a printed and signed copy of IRS Form W-9 to NYSERDA, attention to NYSERDA Finance, 17 Columbia Circle, Albany, NY 12203. Include your auto-generated Project ID Number on this and any forms submitted by mail to NYSERDA. You will receive your Project ID number upon submission of your application. Click to view or print the [IRS Form W-9](#)

Is this entity tax exempt?

CLOSE

SAVE CHANGES

## 5. Site Information (If Site specific information is required per the Solicitation)

- Add your Site Information (if applicable, this step is not required for all Solicitations).
  - **Note:** All Proposal/Concept Paper Submissions do not require a site, therefore this step may be optional on selected submissions.
  - **Create a New Site:** Click “ADD A SITE” for each new site to open a separate “Edit Site” window.
  - **Edit an Existing Site:** Click on “Edit” beside address to update site related information
  - Complete address information and click ‘CONTINUE’

Application Number: 0000101478

### Multi Round Solicitation

Site Information (Step 2 of 7)

Click "ADD A SITE" to provide information on sites that will be involved in the proposed project.

Action	Address 1	Address 2	City	State	Zip	County	Electric Utility Company
<a href="#">Edit</a> <a href="#">Delete</a>				New York	12345	Queens	

[ADD A SITE](#)

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

# NYSERDA Solicitation User Guide

- Input information in all mandatory site address fields (if applicable), and click on “SAVE”

The screenshot shows a web form titled "ADD NEW SITE ADDRESS". A red rectangular box highlights the following fields, which are marked as mandatory with an asterisk (\*):

- Site Name \*
- Address 1 \*
- City \*
- State \*
- Zip \*

Other fields in the form include:

- Address 2
- County (dropdown menu, currently showing "Queens")
- Regional Economic Development Council (dropdown menu, currently showing "New York City")
- Electric Utility Company (dropdown menu, currently showing "Central Hudson Gas & Electric")
- Electric Utility Account Number
- Gas Utility Company (dropdown menu, currently showing "--None--")
- Gas Utility Account Number
- Do you pay System benefits Charge (SBC)? (dropdown menu, currently showing "--None--")

At the bottom of the form, there are two buttons: "CANCEL" and "SAVE". The "SAVE" button is highlighted with a red border.

## 6. Proposal Information / Concept Paper Information

- In the Proposal/Concept Paper Information page input information in the following mandatory fields as shown below. Fill in the Project Title, Proposed Proposal / Concept Paper Category (use the drop down to select the appropriate category – if categories were not listed in the solicitation choose the option available), Proposer Company information, and Proposal / Concept Paper Description
- Click “SAVE” and then click “CONTINUE”

Home Projects Project Invoices Dashboards Manage Users

Application Number: 0000101478

### Multi Round Solicitation

Concept Paper Information (Step 2 of 6)

\* indicates required field  
Describe the project you are proposing.

**Proposed Information**

Concept Paper Title \*

Proposed Concept Paper Category \*

Proposer Company Information \*

Concept Paper Description \*

PREVIOUS

# NYSERDA Solicitation User Guide

Next, provide Yes/No responses to Checklist and Disclosure of Prior Findings of Non-Responsibility questions.

- Based on the answer you select, additional information may be required.

## Checklist Questions

Do you accept all Terms & Conditions in the Sample Agreement? *	<input checked="" type="radio"/> Yes	<input type="radio"/> No	?
Do you wish to have any information submitted in your proposal package treated as proprietary or confidential trade secret information? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No	?
Has the Company or any of its principals been indicted/convicted of a felony in past 5 years? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Are you a Minority or Women-Owned Business Enterprise? *	<input checked="" type="radio"/> Yes	<input type="radio"/> No	
<input type="text" value="NYS MWBE number is 123456789"/>			
Does your proposal contain Minority or Women-Owned Business enterprises as subcontractor? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Are you a certified Service-Disabled Veteran-Owned Business Enterprise? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Does your proposal contain certified Service-Disabled Veteran-Owned Business Enterprises as Subcontractors? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Is other public funding pending/awarded on this and/or very similar topic (prior and/or competing proposals)? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Previous NYSERDA Contracts awarded? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Prior and/or competing proposals submitted? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No	
<b>Disclosure of Prior Findings of Non-Responsibility</b>			
Has any Governmental Entity made a finding of non-responsibility regarding the Individual or Entity seeking to enter the Procurement Contract in the last five years? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Has any Governmental Entity or other governmental agency terminated or withheld a Procurement Contract with the above-named Individual or Entity due to the intentional provision of false or incomplete information? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No	

PREVIOUS

SAVE

CONTINUE

# NYSERDA Solicitation User Guide

## 7. Proposal Budget / Concept Paper Budget

- On the Proposal/Concept Paper Budget page input the following two fields:
  - Proposed NYSERDA Cost
  - Proposed Cost Share (non-NYSERDA funding), if applicable

Application Number: 0000101478

### Multi Round Solicitation



Concept Paper Budget (Step 3 of 6)

Provide detail on the budget of the proposed project.

Success! Budget Information Saved.

Proposed NYSERDA Cost *	<input type="text" value="50,000.00"/>	
Proposed Cost Share	<input type="text"/>	
Proposed Total Cost	<input type="text" value="50,000.00"/>	

PREVIOUS

SAVE

CONTINUE

- Click "SAVE" (note the green notification bar indicates that the save was successful) and then click "CONTINUE"

## 8. Proposal Documents / Concept Paper Documents

The Proposal/Concept Paper Documents page is where you will upload your Proposal / Concept Paper documents.

- In the required Documents section, click on “Choose File” button to upload attachments. Please note the following:
  - Based on the type of submission required attachments may vary. For example, you may be required to upload a Concept Paper or Proposal Document.
    - Required Documents – these documents are mandatory for proposal submission
    - Optional – not required to submit your proposal.
  - Click Browse (if using IE)/Choose file (if using Chrome) to upload your attachment(s)

Based on the file type, please note:

- Files must be smaller than 100MB or they will not upload. [Click here](#) for tips on how to reduce file size.
- For due date solicitations: If you would like to edit or replace a document that you previously uploaded, you can edit until 5pm EST on the solicitation due date.

Home Projects Project Invoices Dashboards Manage Users

---

Application Number: 0000101478

### Multi Round Solicitation

Concept Paper Documents (Step 4 of 6)

The following documents must be uploaded as outlined within this solicitation. Refer to the solicitation for descriptions of the documents that must be attached.

Files have been saved successfully.

Document Name	Recent Uploaded Document	Upload History	Status	Add / Update Document
CP Doc	Concept Paper - Kryptonite Renewable Energy - Multi Round Sol.docx	<a href="#">Attachment History</a>	Submitted	<input type="button" value="Browse..."/>

BACK SAVE CONTINUE



## 9. Authorized Signature and Certification

- The “Authorized Signature and Certification” page will summarize all the information that you have entered. Review the information for accuracy.
  - Use the circles on the top right of the page to navigate back to pages that you have completed, if you would like to review the information before submitting.

Home Projects Project Invoices Dashboards Manage Users

Application Number: 0000101478

### Multi Round Solicitation

Authorized Signature and Certification (Step 5 of 6)

Review the details of your concept paper submission shown below.

#### Primary Company Contacts

Company Name:	Krypton	Address 1:	456 Main Street
Tax identification type:	EIN	Address 2:	
Employer Identification Number (EIN):	22-2222222	City:	Smallville
DUNS Number:		State:	Kansas
		Zip:	67524

Name	Email	Title	Phone	Role	Primary
Clark Kent	superman@gmail.com	President	(518) 862-1090	Proposer	Yes

# NYSERDA Solicitation User Guide

- Click on the checkbox provided, agreeing to the terms and conditions
- Click “CONTINUE”.

Concept Paper Budget Information	
Proposed NYSERDA Funding	\$50,000.00
Proposed Cost Share	
Proposed Total Cost	\$50,000.00

By checking this box and clicking Continue:

I certify that the above information, and all information submitted in connection with State Finance Law §139-j and §139-k, is complete, true, and accurate, that I have read and reviewed the Standard Terms and Conditions set forth in the attached Sample Agreement and that I accept all terms unless otherwise noted herein, and that the proposal requirements noted have been completed and are enclosed;

I affirm that I understand and will comply with NYSERDA's procedures under §139-j(3) and §139-j(6)(b) of the State Finance Law;

I understand that this proposal may be disqualified if the solicitation requirements are not met; and I am authorized to commit my organization to this proposal.

PREVIOUS

CONTINUE

## 10. Proposal Submission / Concept Paper Submission

- On the Proposal/Concept Paper Submission page, click on the SUBMIT button.

Application Number: 0000101478

### Multi Round Solicitation



#### Concept Paper Submission (Step 6 of 6)

Upload your concept paper to be reviewed by NYSERDA staff. NYSERDA will only accept concept papers until the deadline issued in the solicitation. If this solicitation has a deadline, once the deadline has passed, you cannot submit your concept paper.

You are about to submit your concept paper to the Multi Round Solicitation. Concept papers will only be received up to **11/10/2017** at **05:00 PM**. No Concept papers will be allowed to be submitted after this date and time.

PREVIOUS

SUBMIT

# NYSERDA Solicitation User Guide

A green notification bar will appear when the submission is successful.

[Home](#) [Projects](#) [Project Invoices](#) [Dashboards](#) [Manage Users](#)

Application Number: 0000101478

## Multi Round Solicitation

Concept Paper Submission (Step 6 of 6)

**Success!** Concept paper has been submitted.

You are about to submit your concept paper to the Multi Round Solicitation. Concept papers will only be received up to **11/10/2017** at **05:00 PM**. No Concept papers will be allowed to be submitted after this date and time.

[PREVIOUS](#) [SUBMIT](#)

### Reminders:

- Changes/updates to the Proposals/Concept Papers can be made until 5pm Eastern Time on the due date of the solicitation.
- The Proposal/Concept Paper will be unavailable for viewing or edits after the time and date has passed. Proposal/Concept papers in process will not be allowed to finish.
- The primary contact will receive an email that the concept paper/proposal has been submitted.

### 11. How do I access the NYSERDA Portal to complete registration, finish or update my proposal/concept paper, submit another proposal?

**To edit a proposal/concept paper or to submit another proposal/concept paper, select the appropriate solicitation (from the NYSERDA current funding opportunities page) and click the link to apply online.**

- You can edit your contact information, attachments, proposal/concept paper until 5pm Eastern Time on the date noted in the solicitation.
- Login with your NYSERDA Portal Username & Password credentials (if you have previously created an account your username is your email followed by “.nyserda” (for example [jsmith@gmail.com.nyserda](mailto:jsmith@gmail.com.nyserda)) You must include the “.nyserda” or you will not be able to login to the system.

You will be asked if you would like to edit or create a new submission. Choose the appropriate selection.

# NYSERDA Solicitation User Guide

YORK STATE

Search... Search Clark Kent ▾

Home Projects Project Invoices Dashboards Manage Users SQA Schedule Inspection SQA Worklist

## Multi Round Solicitation

Our records indicate that you have one or more existing records that for this solicitation. Before you proceed, please indicate whether you would like to make changes to an existing record or create a new submission.

Proposals - Would you like to make changes to an existing record?

Action	Primary Contact	Proposal Title	Round	Proposal Budget	Status
	Clark Kent	The Power of Kryptonite	Default	\$500,000.00	Under Review
<a href="#">Edit</a>	Clark Kent	Kryptonite, the next Renewable Energy	Default	\$200,000.00	Submitted

OR

CREATE A NEW SUBMISSION

If editing a submission, click the edit link. (*Depending on the type of solicitation you may not have the ability to edit, please contact Jillina Baxter or the Program contact for this solicitation if you cannot edit. See step 13 of this guide for contact information.*)

- After clicking the edit link, a home page will display (see next page). The top left is where you can navigate to the different steps of your proposal/concept paper submission.

If you would like to create a new submission, click the "Create a new Submission" button and follow the steps previously noted in this guide to submit your proposal or concept paper.

# NYSERDA Solicitation User Guide

[Home](#) [Projects](#) [Project Invoices](#) [Dashboards](#) [Manage Users](#) [SQA Schedule Inspection](#) [SQA Worklist](#)

Application Number: 0000101478

## Multi Round Solicitation



Proposal Submission (Step 6 of 6)

**Success!** Proposal has been submitted.

You are about to submit your proposal to the Test Solicitation. Proposals will only be received up to **12/31/2018 at 02:16 PM**. No Proposals will be allowed to be submitted after this date and time.

[PREVIOUS](#)

[SUBMIT](#)

Make edits as needed and click save. If you are updating attachments, upload directly into the appropriate location and the new document will replace the old document without needing to delete.

# NYSERDA Solicitation User Guide

## 12. Invitation to submit a proposal after concept paper is approved

The following guidance is for solicitations where a concept paper is required before a proposal can be submitted. If you have been notified that your concept paper has been approved and you are now invited to submit a full proposal, please review the following information.

- The primary contact, entered in the NYSERDA Portal during concept paper submission, will receive an email stating that the concept paper has been approved (if the concept paper was not approved, the primary contact will also receive an email stating such.) *See page 9 of this document if you are not sure where to enter a primary contact.*
- To submit a proposal (if your concept paper has been approved):
  - Click on the submission link provided in the concept paper acceptance email. **OR**
  - Go to solicitation on the NYSERDA Current Funding Opportunity Page, click “Apply Online”.

**Please Note: you must login to the NYSERDA Portal using the same email address/user name from which the concept paper was submitted.** Proposal submission will not be successful if you log into the NYSERDA Portal from a different account or create a new account.





# NYSERDA Solicitation User Guide

Home Projects Project Invoices Proposal Review Dashboards Manage Users

## Solicitation

Our records indicate that you have one or more existing records that for this solicitation. Before you proceed, please indicate whether you would like to make changes to an existing record or create a new submission.

Concept Paper - Would you like to make changes to an existing record?

Action	Primary Contact	Proposal Title	Proposal Budget	Status	Result	Next Step
F		Ch...	\$78,000.00	Closed	Pass	<a href="#">Submit Proposal</a> ←

Proposals - Would you like to make changes to an existing record?

Action	Primary Contact	Proposal Title	Proposal Budget	Status
F		5000	\$54,000.00	Awarded
T		Proposal Test	\$200.00	Under Review
fa		56000 - 1	\$5,600.00	Pending Review

OR

[CREATE A NEW SUBMISSION](#)

- You will be redirected to the intermediary page with the listed Concept papers/Proposal that you have submitted or started
- You now have the option to submit a proposal by clicking on the 'Submit Proposal' hyperlink

# NYSERDA Solicitation User Guide

Application Number: 0000092382

## Solicitation

Proposer Contact Information (Step 1 of 6)

Click "ADD A CONTACT" to provide information on contacts who will be involved in the proposed project.

[ADD A CONTACT](#)

Action	Name	Email	Phone	Company Name	Primary
<a href="#">Edit</a>   <a href="#">Clone</a>	F			fam	Yes

PREVIOUS [CONTINUE](#)

- Complete all steps to submit proposal:
  - Add contact information
  - Enter company and proposal information
  - Answer checklist questions
  - Upload proposal and/or attachments
  - Review all the information provided in the “Authorized Signature and Certification” Step.
  - Click on the checkbox provided agreeing to the specified terms and conditions and click Submit

The primary contact will receive an email, after the proposal has been reviewed, to notify them if the proposal will be awarded or if it has not been selected for award.

# NYSERDA Solicitation User Guide

---

## 13. Troubleshooting

If you are having technical difficulties, please verify the following:

- That you are using the most current version for Chrome, Firefox, or Internet Explorer (see section one – Getting Started for details.)
- The NYSERDA Portal is being accessed **directly** from the “current funding opportunities” link on the NYSERDA Website. You must click the “apply online” link for the specific solicitation for which you are applying/proposing to or that you wish to edit.
- Ensure that your username includes “.nyserda” after your email address as your username (for example [jsmith@gmail.com.nyserda](mailto:jsmith@gmail.com.nyserda)).
- The deadline for the solicitation has not passed. **The NYSERDA Portal closes promptly at 5:00pm ET on the due date in the solicitation.** Submission that are in process, attempted edits, or new submissions after 5pm Eastern Time on the due date in the solicitation, will not be accepted.

If you are still having technical difficulties with proposal submission after troubleshooting, contact Jillina Baxter, email [Jillina.Baxter@nyserda.ny.gov](mailto:Jillina.Baxter@nyserda.ny.gov) , by phone (518) 862-1090 x3418, or the Program contact listed in the solicitation.

# NYSERDA Solicitation User Guide

---

## 14. Tips to Optimize Large File Size

### Microsoft Word, PowerPoint, & Excel

- MS Word, PowerPoint, and Excel automatically optimize images inserted into a document. Adding images to a document, in most cases, reduces submission file sizes opposed to submitting them in their original format.
- To further optimize files with image content, saving a Word, PowerPoint, or Excel document as a PDF file may reduce file size.
- In MS Word, PowerPoint, and Excel - click on **File** change the **file format** to PDF and click **Save**.

### Acrobat Pro

- Open the PDF Optimizer dialog box (File > Save As Other > Optimized PDF).
- To use the default settings, choose Standard from the Settings menu, and then skip to step 6. If you change any settings in the PDF Optimizer dialog box, the Settings menu automatically switches to Custom.
- From the “Make Compatible With” menu, choose “Retain Existing” to keep the current PDF version, or choose an Acrobat version. (The options available in panels vary depending on this choice.)
- Select the checkbox next to a panel (for example, Images, Fonts, Transparency), and then select options in that panel. To prevent all the options in a panel from executing during optimization, deselect the checkbox for that panel.
- Optional - To save your customized settings, click Save and name the settings
- To delete a saved setting, choose it in the Settings menu and click Delete.
- When you are finished selecting options, click OK.
- In the Save Optimized As dialog box, click Save to overwrite the original PDF with the optimized PDF, or select a new name or location.
- **Note:** To optimize several documents at the same time, use the Output options for the Actions Wizard.
- Learn More at the [Adobe](#) website.

### Zip Files

- Compressing a single large file or multiple files using zip compression may decrease file size
- On Windows and MacOS machines, you can right click on the file and locate the compress option

# NYSERDA Solicitation User Guide

---

## 15. Requirements for Paper Submission

NYSERDA will also accept proposals by mail or hand-delivery. If mailing or hand-delivering, proposers must submit (2) paper copies of their proposal with a completed and signed Proposal Checklist, along with a CD or DVD containing either a PDF or MS Word digital copy of the proposal. Proposal PDFs should be searchable and should be created by direct conversion from MS Word, or other conversion utility, rather than scanning. A completed and signed [Proposal Checklist](#) must be attached as the first page of your proposal. Proposals are due by 5:00pm Eastern time on the date noted on the first page of the solicitation. Late, faxed, or e-mailed proposals will not be accepted. Proposals lacking the appropriate completed and signed Proposal Checklist and incomplete proposals may be subject to disqualification. It is the proposer's responsibility to ensure that all pages have been included in the proposal. Proposals will not be accepted at any other NYSERDA location other than the address below. If changes are made to a solicitation, notification will be posted on the current funding opportunities page of NYSERDA's web site at <https://www.nyserda.ny.gov/Funding-Opportunities/Current-Funding-Opportunities>.

Mailed or hand-delivered proposals must be clearly labeled and submitted to:

Proposals, PON/RFP XXX

NYS Energy Research and Development Authority

17 Columbia Circle

Albany, NY 12203-6399

- In compliance with §139-j and §139-k of the NY State Finance Law (see Section V, General Conditions of the solicitation for additional information), additional forms must be completed and filed with paper proposals: (1) a signed copy of the [Proposal Checklist](#) including required certifications under the State Finance Law and (2) a completed [Disclosure of Prior Findings of Non-Responsibility](#) form. Failure to include a signed copy of the Proposal Checklist referenced in this solicitation may disqualify your proposal.
- Proposals should not be excessively long or submitted in an elaborate format that includes expensive binders or graphics. Unnecessary attachments beyond those sufficient to present a complete, comprehensive, and effective response will not influence the evaluation of the proposal. Each page of the proposal should state the name of the proposer, the PON/RFP number, and the page number. The proposal must be in the format described in the solicitation.