New Construction Program
Application Instructions

1. Log into the NYSERDA Portal here: https://nyserda-portal.force.com/login

a) If you are applying for the first time, please complete a registration form here: https://portal.nyserda.ny.gov/Core_Registration_Page?programName=New_Construction

b) **Disclaimer: Commercial New Construction Program applications must first apply through the Consolidated Funding Application (CFA) online at:** http://www.nyserda.ny.gov/Funding-Opportunities/Consolidated-Funding-Application.aspx. After completing the CFA, you can expect to receive a log-in and instructions via email to complete the application process in the New Construction Portal. You will **not** need to sign up using the link in step a.

2. Once logged in, to begin an application for Housing projects, click on the 'Submit a new Application' tab at the top of the page. Commercial New Construction Applicants, you can skip this step, you will find a partially completed application in Unsubmitted status on the "Projects" tab containing information from the CFA.

   a) Next, click on 'New Construction Program' and it will take you to the application

3. Begin entering your company information into **Step 1** of the application.

   a) If you are not legally affiliated with the entity that will receive the NYSERDA incentive (if approved) as per program requirements, **stop here**. The application must be initiated by the applicant company, because the program terms and conditions on the application must be signed by the applicant. This application does allow for a main-entity/sub-entity relationship between two companies that are legally associated.

   b) If you would like to list a sub-entity company (i.e. for the incentive payment to be made to a LLC) you MUST check the box next to 'Indicate if your company is utilizing a sub-entity for this application (i.e. LLC, Inc. etc)'

      i. You will need to check the 'Payee' box next to the company that will be receiving incentives/payment

         1. Payee = company that will receive the incentives/payment

      ii. **Please Note:** You MUST indicate the LLC information on Step 1 of the application prior to moving to application step 2. Once you move to Step 2 of the application, you are unable to make any changes to the Main Company or Sub-entity Company Information.

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Company Information (Step 1 of 8)

Do not copy or share the URL shown in your browser for this page as it is unique to you. If you would like to share the sign-up link, copy and share the following link: https://uat-nyserda-portal.cs32.force.com/Core_Programs_Page

Provide your company information as detailed below. Complete all required fields marked with an asterisk. The information is in place of a W-9 form. You may skip questions that do not apply to you.
The legal business name must match the name associated with your Employer Identification Number (EIN). If it does not, your application will be rejected.

Indicate if your company is utilizing a sub-entity for this application (i.e. LLC, Inc, etc.) ☑

Akwesasne Housing Authority ⌄

Legal Business Name ❓

Company Type ❓

Street Address ❓

Payee ❓
☐

City

State/Province *

New York ⌄

Zip Code

14614

What kind of business do you have? (select all that apply) *

Exempt Payee Code

❓

Tax Identification Type: *

🔘 Employer Identification Number (EIN)
⭕ Social Security Number (SSN)

Employer Identification Number (EIN)

Your Employer Identification Number (EIN) is not your Social Security Number.
See the IRS Form W-9 instructions for more information. IRS Form W-9
Instructions

CONTINUE

4. Click 'Continue' (shown above) to move along to **Step 2** of the application

5. Please Note: After starting the application, the application will be saved in the 'Projects' tab of your portal. If you do not complete the application, you may login to the portal to continue to fill out the unsubmitted application.
6. Add project contacts to your application:
    a) **Site owner/signatory:** has the authority to sign legally binding agreements on behalf of the company. If the individual completing the application is not the signatory, please identify the site owner/signatory in Step 2. Please keep in mind that there should only be **one** individual for this role
    b) **Stakeholders:** Any individual that works for the applicant entity that is not the site owner/signatory but needs access to the application, Stakeholders may also work for an outside entity.
    c) **Primary Energy Consultant (PEC):** These roles are required for all new construction projects. For projects applying to the New Construction-Housing program, the credentials required of the Applicant's selected PEC are defined by the 3rd party performance standard also selected by the Applicant. The Applicant must confirm the PEC has established the appropriate credentials with NYSERDA [e.g. HERS Rater, Energy Modeler, CPHC/D]. Once the PEC has been selected, the Applicant should request the PEC identify the entity delivering the quality assurance oversight [e.g. the EPA-recognized Home Certification Organization (HCO) or RESNET Provider, the EPA-recognized Multifamily Review Organization (MRO), or the Passive House Certifier or Verifier]. The list of PEC firms can be found here: https://www.nyserda.ny.gov/Contractors/Find-a-Contractor/NCP-Primary-Energy-Consultant. If you are not yet working with one you can still submit the application but please keep in mind that you will need to choose one before your application can be approved.
    d) **Please note:** Providing a contact with Read/Write/Upload access in this step, will allow that individual to collaborate on the application, as well as to update project information and upload documents to the project in the Salesforce portal. The contact will receive an email that they have been added to the application.

7. Once you have completed entering your project contacts, click 'Continue' to move along to the next step.

a) You can also go back to a previous step by clicking 'Previous' or the circles at the top right of the page.

8. Enter your project path information on **Step 3** of the application.
   a) Please keep in mind that every red star indicates a required point of information.

b) Note: Even if a field is not required, it is highly recommended to enter the information if it is known.

9. Click 'Continue' and move along to S**tep 4** of the application.
10. Click 'Add site' and enter the required information for each site that this project consists of. Make sure you click 'Save' after entering each site's information.
   a. Multiple sites can be entered for each application. For single-family homes, an applicant may include multiple scattered-site homes in one application. For commercial and housing projects, each building must be entered as an individual site. For mixed-use buildings, commercial space and housing space must be separated into two sites.
   b. Note: Even if a field is not required, it is *highly* recommended to enter the information if it is known, including **county**, **impacted site square footage**, **performance tier**, **unit count** (if the project/site is residential), **utility information** and **fuel type**.

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You must enter at least one project site by selecting "ADD A SITE".

For single family homes, enter each home as its own site.

For mixed-use buildings that contain both commercial and residential spaces, enter two sites: one for the commercial space and one for the residential space.

Customers in areas affected by a utility company natural gas constraint may be eligible for enhanced programs through the Clean Energy Action Plan. This includes Con Edison customers in Southern Westchester County and NYSEG customers in the Town of Lansing, NY that are currently paying into the System Benefits Charge. To learn more about the Clean Energy Action Plan and verify eligibility visit: nyserda.ny.gov/ActionPlan

Project Performance
- Zero Energy Certified projects have been awarded Net Zero Energy (NZE) (or equivalent) certification by a third party.
- Zero Energy Verified projects have achieved ZE for at least one full year and New Building Institute (NBI) has verified the performance data.
- Zero Energy Emerging projects have publicly stated goals of reaching Zero Energy (ZE) and are in design, construction, operating less than 12 months, or occupied more than 12 months but has yet to achieve ZE.
- Ultra-low energy buildings are those with low annual energy usage (gross EUI) without on-site renewables.
- Passive House projects have achieved certification from either the Passive House Institute (PHI) or the Passive House Institute US (PHIUS).

⊕ ADD A SITE

Show [10 ⬍] entries   Search: [   ]

Action	Site #	Address 1	Address 2	City	State	County
			At least one project site is required.			

Showing 0 to 0 of 0 entries   ‹   ›

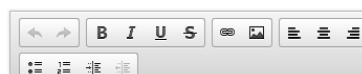PREVIOUS   **CONTINUE**

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11. Click 'Continue' to move along to S**tep 5** of the application.
12. Enter the project's description (required) and any other additional information that you have at this time. Project Square Footage is the combined square footage for all sites.
13. Note: While some of this information is not required at submission, it may need to be provided before you can receive an official project approval.

Project Square Footage	[ ]
Schematic Design Date	[ ] [7/21/2020]
Design Development Date	[ ] [7/21/2020]
Building Permit Submission Date	[ ] [7/21/2020]
Buildings Department Permit Approval Date	[ ] [7/21/2020]
Construction Documents Complete Date	[ ] [7/21/2020]
Project Bid Date	[ ] [7/21/2020]
Construction Completion Date	[ ] [7/21/2020]

Project Description *

14. Click 'Continue' to move along to **Step 6** of the application.
15. Please review the project information that appears on this screen. If you are the signatory, you can click 'Electronic Signature' and it will bring you into DocuSign, where you can sign the application. Or alternatively, you can click 'Print' to print the application, wet sign it, and upload it as a .pdf document into step 7.

a) If you are not the signatory, click 'Email Signatory' and an automated email will be sent to the signatory contact with a link to sign the application

16. Click 'Continue' to move along to **Step 7** of the application. If applicable, upload the signed application into step 7 (required, unless the application is e-signed in Step 6) and all other additional documents (such as the Building Permit, LMI Award Letter, etc.) that you have currently (if applicable)
    a) Once you have uploaded the documents, click 'Save' before continuing to the last step

Documents Upload (Step 7 of 8)

Upload all required documentation and any other optional documents that you would like NYSERDA to review as part of your project application.

If you need to change an uploaded document, please select browse to upload a new document. Please note, the new document will replace the first document. Select "Attachment History" to view all attachments.

Required Documents

Document Name	Recent Uploaded Document	Upload History	Status	Add / Update Document ❓	
Signed Application document ❓				Choose File No file chosen	

Optional Documents

Document Name	Add / Update Document	Recent Uploaded Document	Upload History	Status
Building Permit ❓	Choose File No file chosen			
ENERGY STAR® Participation ❓	Choose File No file chosen			
Low-to-moderate-income (LMI) Documen ❓	Choose File No file chosen			
PON3943 Attachment A - Project Pipeline	Choose File No file chosen			
PON3943 Attachment B - Task Work Ord	Choose File No file chosen			
Document Name	Choose File No file chosen			x

➕ ADD ANOTHER DOCUMENT

PREVIOUS	SAVE	CONTINUE

17. Click 'Continue' to move along to **Step 8** of the application (this is the final step).
    a) Please take a moment to review your application to make sure it is complete
    b) Once you are done reviewing, click 'SUBMIT'

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Application Submission (Step 8 of 8)

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Application # 0000224055

Please review your application to make sure it is complete before clicking the "SUBMIT" button. Once your application has been submitted, you will no longer be able to make changes.

If you have any questions or need to modify your application after you submit, contact us at NewConstructionProgram@nyserda.ny.gov.

PREVIOUS   DISCARD   SUBMIT

You have now submitted your NYSERDA New Construction Program Application. You will be contacted by the New Construction Program team if any additional information is required to review the project application.

Please retain your Application #.

If you have any questions, please contact NewConstructionProgram@nyserda.ny.gov, and include your application number for reference.