

NY HP Portal EmPower NY Workflow Appliance Vendor User Guide



Last revised: 8/15/17

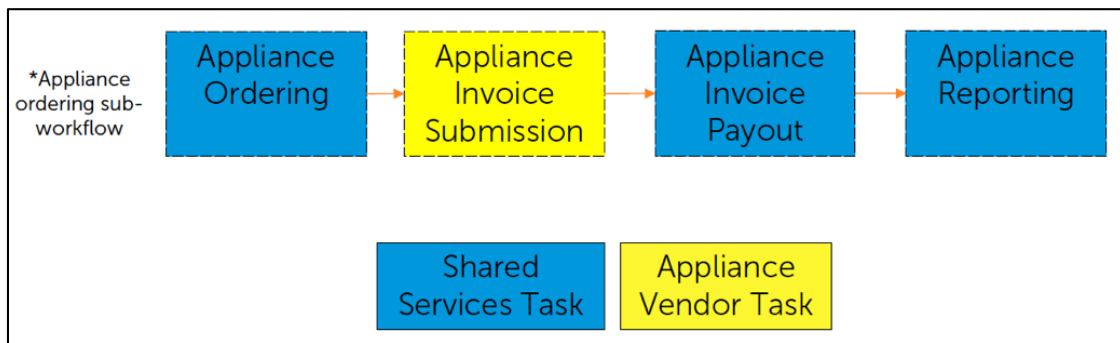
ENERGYSAVVY

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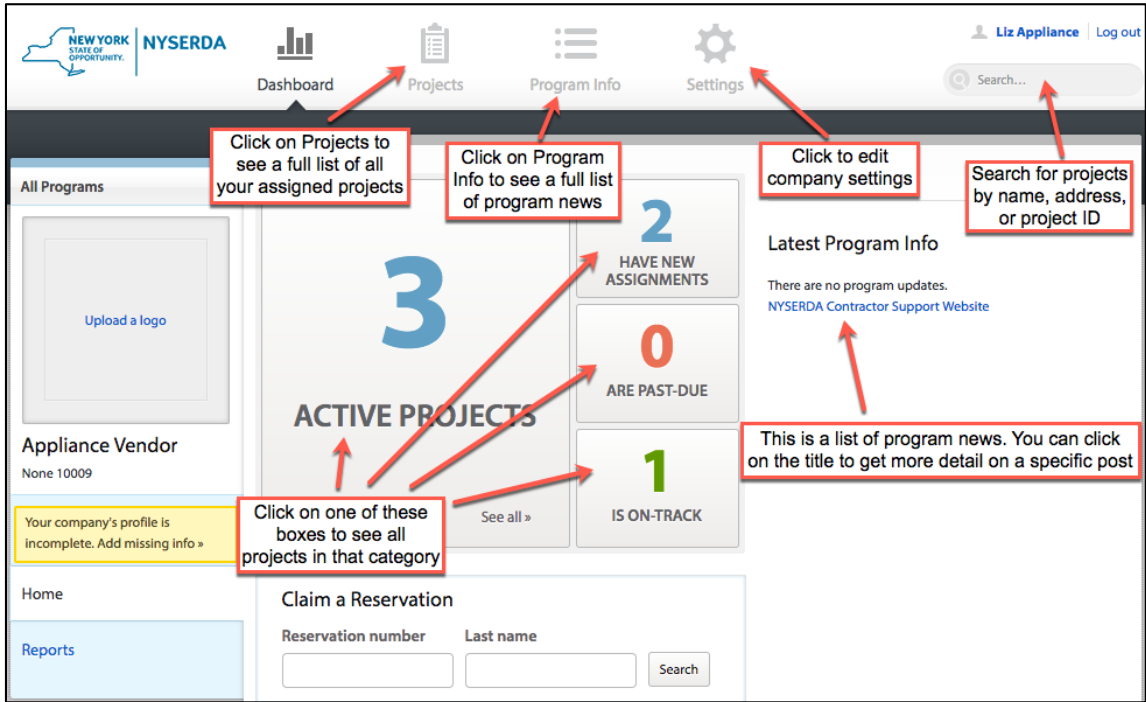
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Introduction

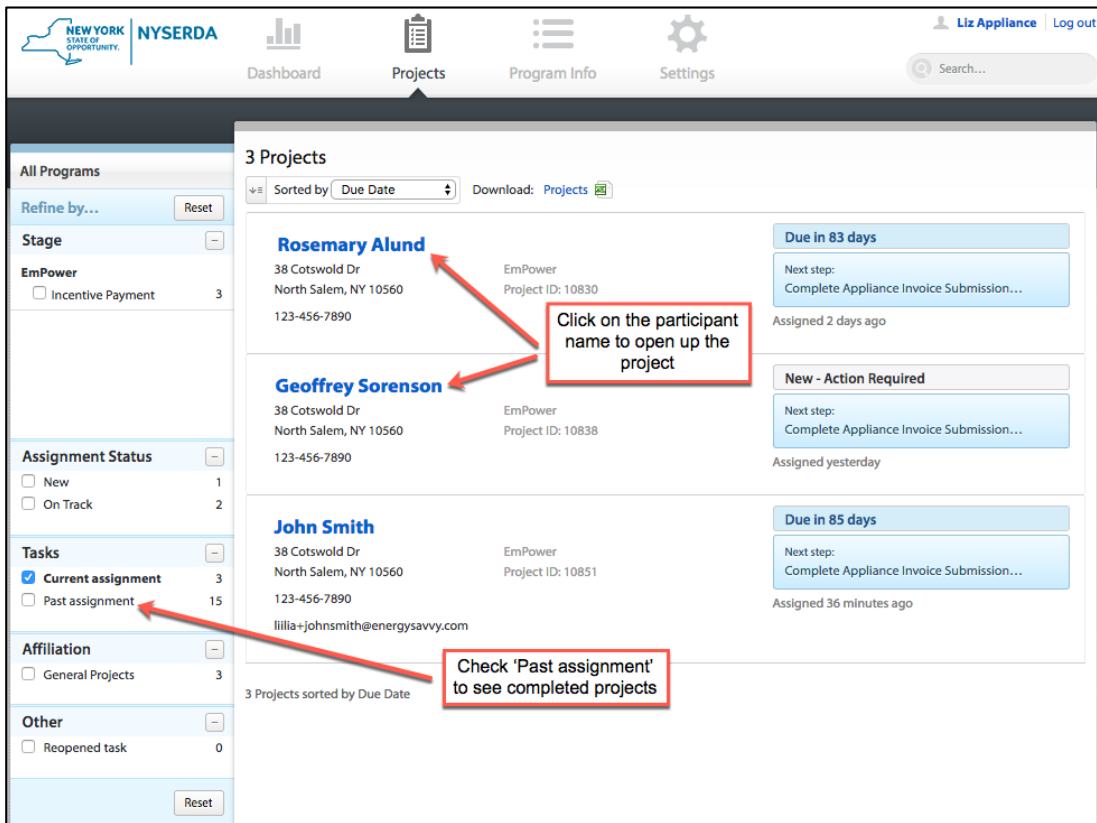
- What is the Appliance Ordering Sub-Workflow?
 - The appliance ordering sub-workflow is the part of the EmPower workflow that handles the appliance ordering process for participating income-eligible New Yorkers. This sub-workflow can occur in parallel to the remainder of the EmPower HP or ER job.
- What does the sub-workflow look like?
 - The appliance ordering sub-workflow consists of four tasks, of which only the Appliance Invoice Submission task is completed by the appliance vendor.



- Where do I find the Appliance Invoice Submission task?
 1. Go to <https://nyserda.energysavvy.com/> to log in.
 2. Navigate to the project list via the 'Projects' tab at the top of the page or by clicking the relevant project category box:



3. Click on the participant name to open the relevant project:



Appliance Invoice Submission task

Once Shared Services completes the Appliance Ordering task and selects the appropriate vendor for the Appliance Invoice Submission task, the Appliance Vendor will receive an email notifying them of the new project. The new project will also appear in the selected vendor's Projects list.

To complete the task, the appliance vendor will order the appliance with the specifications listed on the right side of the page. Then, when the invoice is ready, the appliance vendor will upload the appliance ordering invoice and fill in other relevant fields, if applicable. Note that uploading the invoice is required and the task cannot be submitted without uploading the invoice.'

Complete Appliance Invoice Submission Due in 85 days

Assigned June 29, 2017 Jump to Timeline ▾

Due date: Sept. 21, 2017

* Required fields

Appliance ordering invoice * Required field

No file chosen

Fees associated with the project

Description of fees

Reviewer's Notes

Add a Note (optional)

Participant [View Details >](#)

John Smith
lillia-johnsmith@energys.wvy.co
123-456-7890

Program Info

Stage Incentive Payment
Updated 26 minutes ago

Premise [View Details >](#)

38 Cotswold Dr
North Salem, NY 10560

Refrigerator

Type	Side by side
Size	20
Model number	1234588
Hinge	left
Approved cost	500.00
Max width	30
Max height	65
Appliance to remove	Old fridge will be removed.
Notes	
Freezer	
None	

Information about the appliance

Click 'View Details' to see additional information about the participant or the premise

Click 'Send Now' to submit the task

Click 'Save & Save Later' to save the inputs and submit the project later

When the appliance vendor completes the Appliance Invoice Submission task, the project will move forward to the Appliance Invoice Payout task.

- The Appliance Invoice Payout task is completed by Shared Services who will either accept or reject the invoice.
- If the invoice is rejected, the project is sent back to the Appliance Invoice Submission task. The appliance vendor will receive an email with notes detailing why the invoice was rejected. The notes will also be listed in start data on the Appliance Invoice Submission task.

Complete Appliance Invoice Submission Due in 85 days

Assigned June 29, 2017 Jump to Timeline ▼

Due date: Sept. 21, 2017

* Required fields

Appliance ordering invoice *

No file chosen

Currently: 38-other-b642fc94e1c115b52c91.pdf

Fees associated with the project

Description of fees

Refrigerator	
Type	Side by side
Size	20
Model number	1234588
Hinge	left
Approved cost	500.00
Max width	30
Max height	65
Appliance to remove	Old fridge will be removed.
Notes	
Freezer	
None	

Invoice Payout Task Reviewer's Notes
Please edit x, y, and z.

If the invoice submission task cannot be completed, the appliance vendor can send the project back to the Appliance Ordering task by selecting 'This task cannot be completed' with one of the following reasons:

- Customer not responsive
- Refusal
- Measurements not accurate
- Wrong appliance on site at the time of delivery
- Other

Additional Resources

Vendors may contact support.residential@nyserda.ny.gov with questions.