Session Facilitator:

Cathy Kenny-Wilkerson

MyEnergy End User Training

Contractors completing electronic submission on behalf of customers

**NEW YORK STATE** | **NYSERDA**

Overview and General Navigation

GENERAL NAVIGATION

- How to Register/Login to MyEnergy
- How to Modify My Profile
- How to Access the Learning Center
- How to Request Support in My Energy
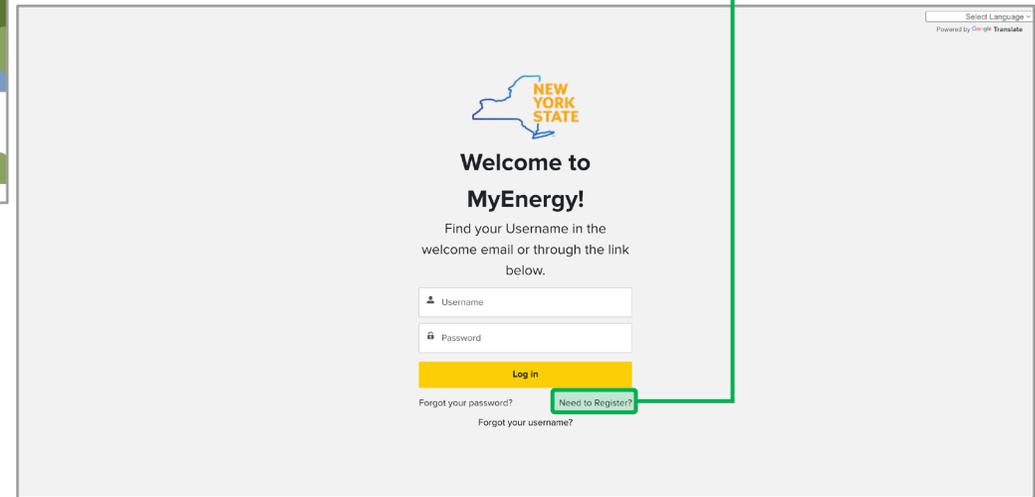
How to Register/Login to MyEnergy

How to Register to MyEnergy as a First Time Resident User?

Step 1. Navigate to MyEnergy in Your Browser and Select **Login/Register**
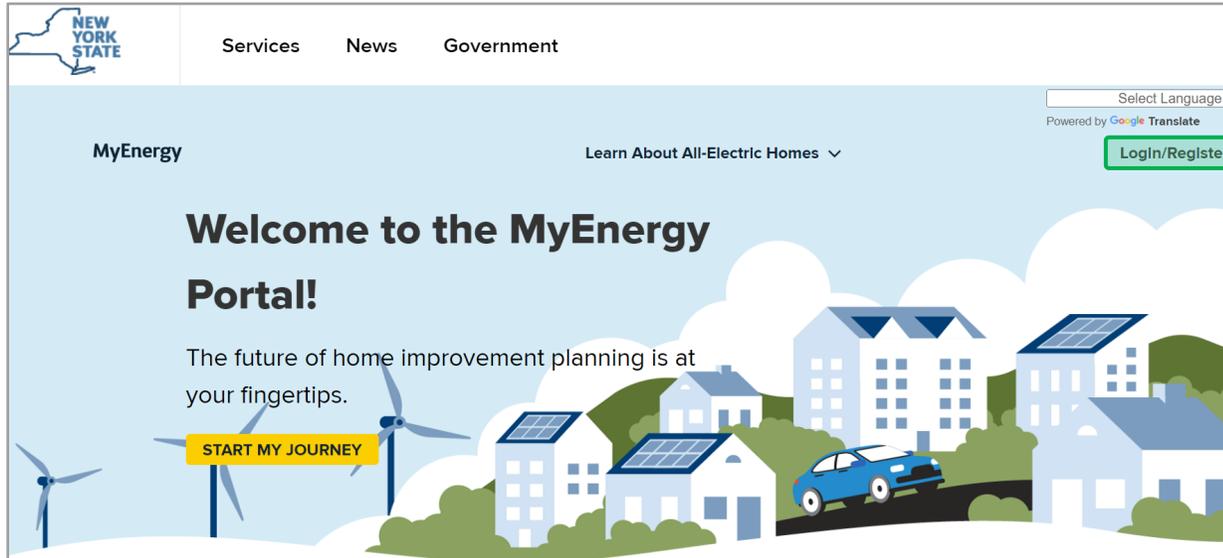
MyEnergy Portal Link
Plan.MyEnergy.ny.gov

Step 2. Click **Need to Register?**

How to Register to MyEnergy as a First Time User?

Step 3. Enter you Contact Information and Click **Next**

Contact Information Needed for Registration:

The following information will be needed to register for MyEnergy
- First Name
- Last Name
- Email
- Phone
- Username
(*ExampleUsername@youremail.com*)

How to Register to MyEnergy as a User with Existing Login Credentials?

Step 4. Users with NYSERDA login credentials will use the same credentials,
if you need to reset your password Click **Forgot Password**

Step 5. Enter Username and Click **Request Password Reset**

How to Login to MyEnergy?

Step 1. Navigate to MyEnergy in Your Browser and Select **Login/Register**
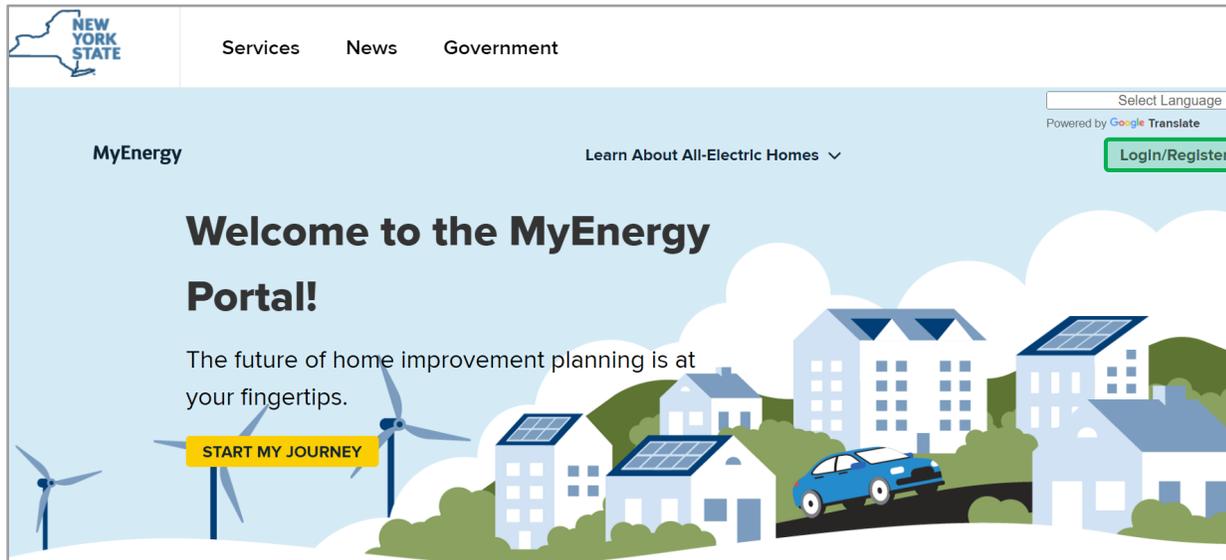
MyEnergy Portal Link
Plan.MyEnergy.ny.gov

Step 2. Enter Credentials and Click **Login**
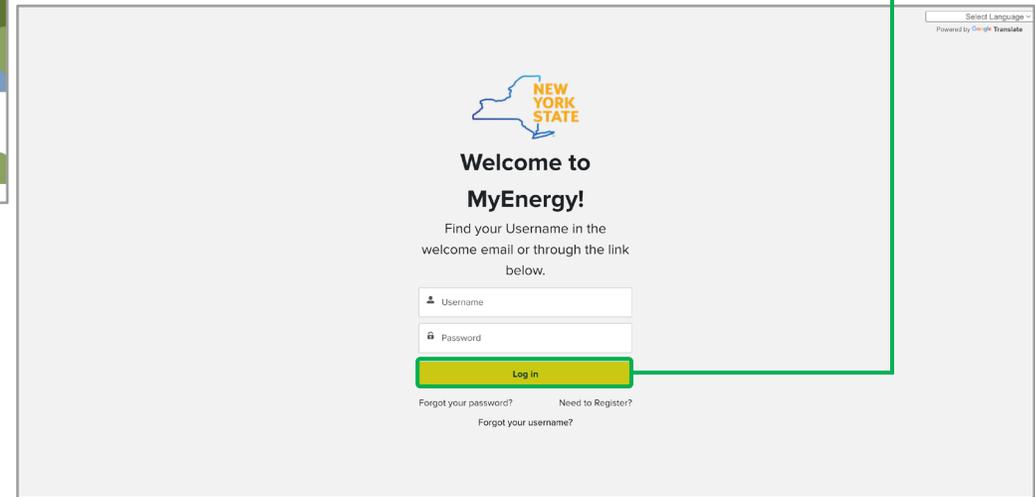
How to Modify my Profile

How to Modify my Profile?
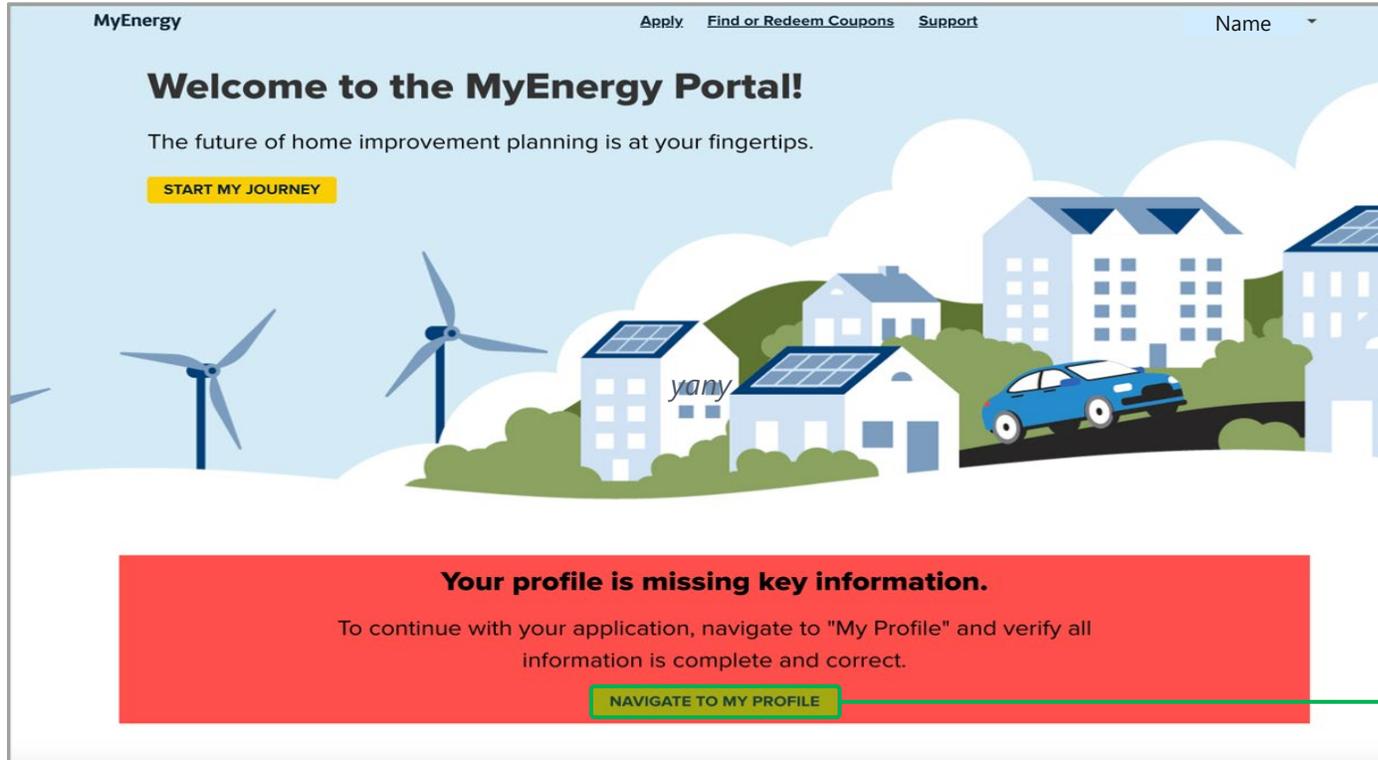
Step 0. If missing key information, **an Error widget** will appear **on your home page**

How to Modify my Profile?

Step 1. Once logged in, Select the **Drop-Down arrow** next to Click **My Profile**

How to Modify my Profile?
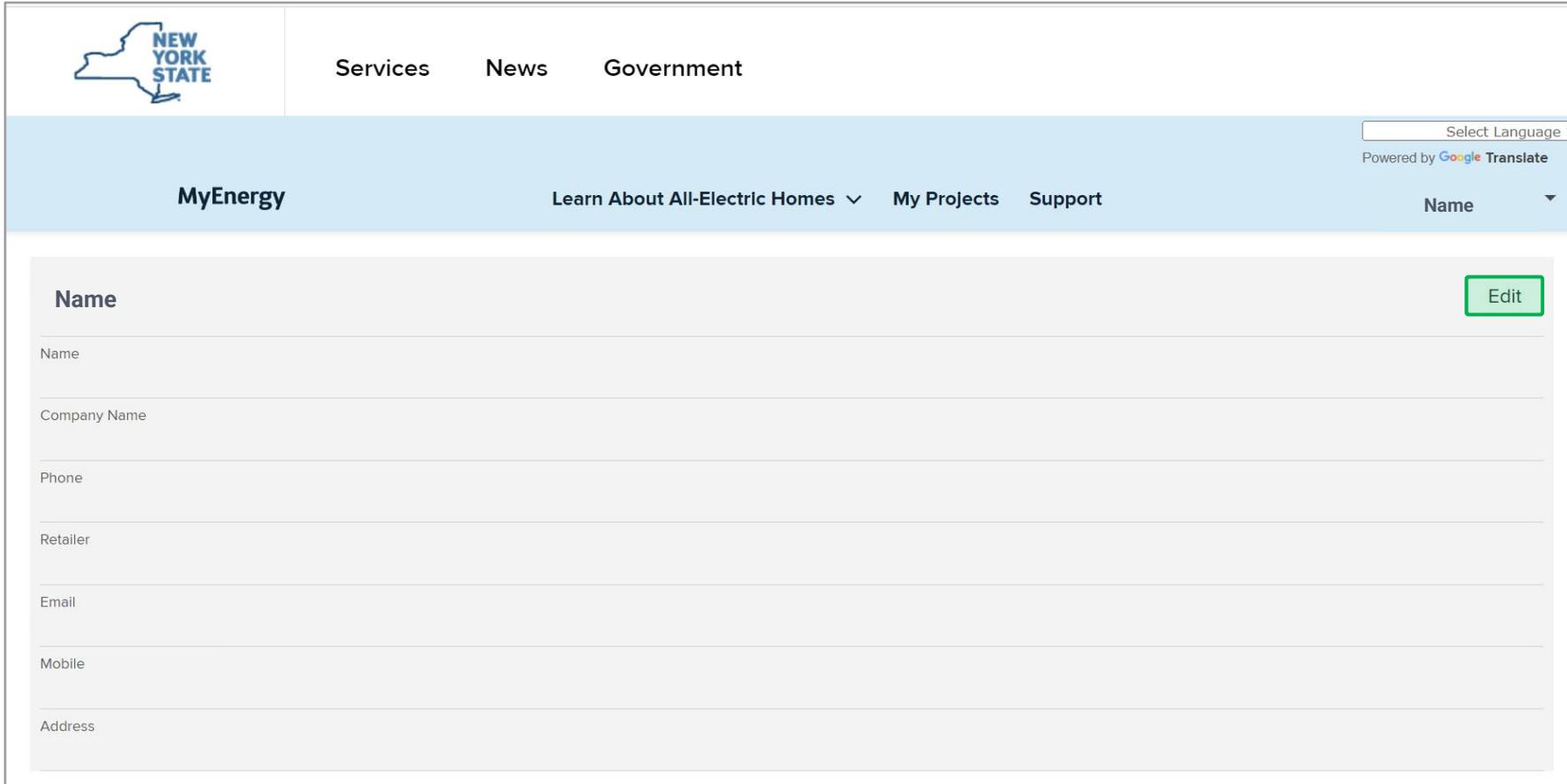
Step 2. Click **Edit**

How to Modify my Profile?

Step 3. Enter About/Contact Information and Click **Save**

Required Profile Information:

First Name, Last Name, Email, Phone, and Mailing Address

How to Request Support

How do I Request Support?
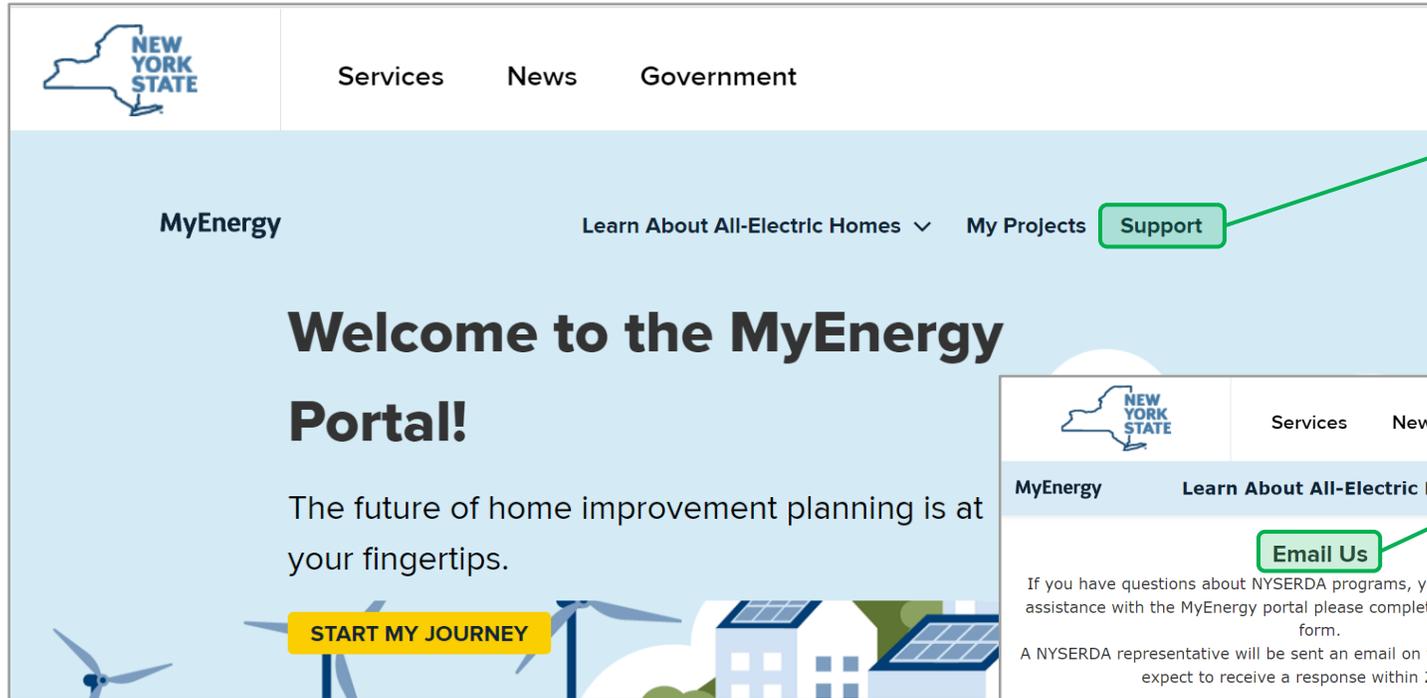
Step 1: Navigate to MyEnergy Home Page and select **Support**

Step 2: Request Support through **Email** or **Call**
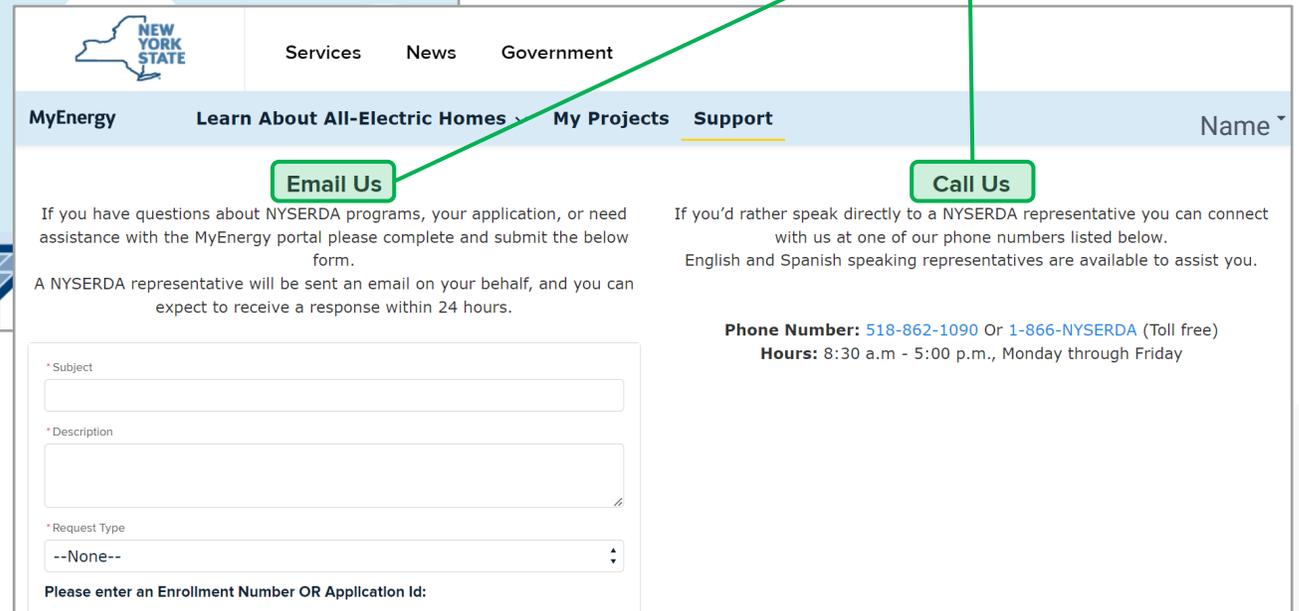
Requesting Support via the **Email Us** form

Select Language ✓

Powered by Google Translate

MyEnergy   Learn About Home Energy Upgrades ⌄   My Projects

MyEnergy   Learn About Home Energy Upgrades ⌄   My Projects   Support

Uthman Aziz ▼

Email Us

If you have questions about NYSERDA programs, your application, or need assistance with the MyEnergy portal please complete and submit the below form.

A NYSERDA representative will be sent an email on your behalf, and you can expect to receive a response within 24 hours.

*Subject

*Description

*Support Type

--None--

SEND EMAIL

Email Us

If you have questions about NYSERDA programs, your application, or need assistance with the MyEnergy portal please complete and submit the below form.

A NYSERDA representative will be sent an email on your behalf, and you can expect to receive a response within 24 hours.

Call Us

If you'd rather speak directly to a NYSERDA representative you can connect with us at one of our phone numbers listed below. English and Spanish speaking representatives are available to assist you.

Phone Number: 518-862-1090 Or 1-866-NYSERDA (Toll free)

Hours: 8:30 a.m - 5:00 p.m. ET, Monday through Friday

Thank you for emailing us a question. A NYSERDA representative will follow-up directly with you at the email address associated to your MyEnergy profile.

Update subject with high level description of your inquiry followed by supporting details to assist in mitigation strategy

Application and Enrollment number can be found within the "My Projects" tab

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Requesting Support via the **Call Us** form

When possible, have your contact information and/or application number on file available to assist the agent in locating your records

Where does my Request for Support go?
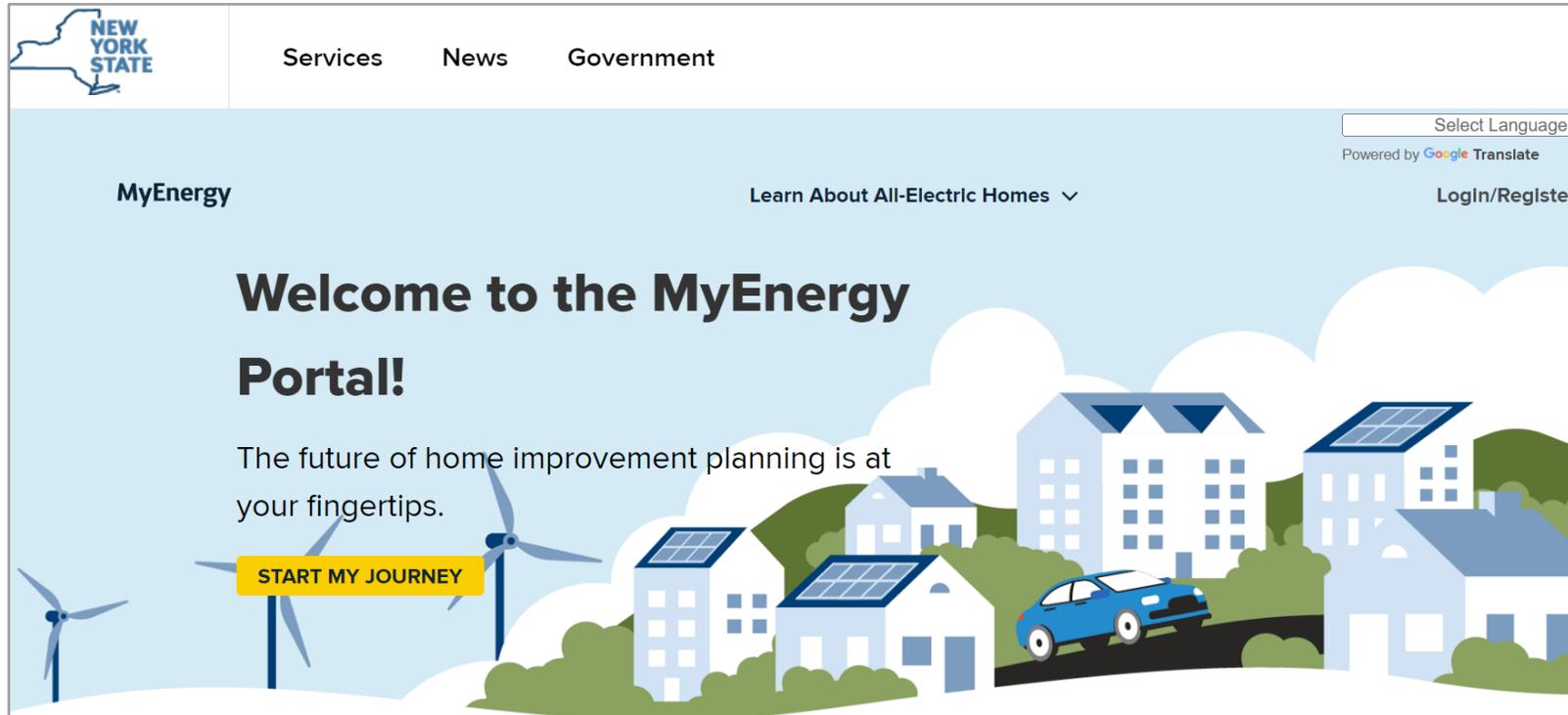
MyEnergy Support Information:

The routing of each Support Type varies based on the audience submitting questions. The following showcases which questions will be routed to
- Application Support -> Routes to TRC
- Whole Home Project -> Routes to CLEAResult
- Appliance Support -> Routes to TRC
- General Process Support -> Routes to TRC
- Other -> Routes to TRC *(May get reassigned to CLEAResult)*
  - All Support Types require an Application Number OR Enrollment Number except for "Other"

How to Submit an Application

How to Submit an Application

Points to Remember

- Be sure to complete each section. If you need more time, you can save your application and return to it at any time.

- You will need to upload the most recent electric utility bill and required eligibility documents with your application submission. If you don't have them now, you can save your application and return to it when you have the documents available.

- '*' Indicates a required field. You must fill out this field to proceed with your application.

Need help?

Call us at: 866-NYSERDA, or email us

- **EmPower+ Support:** info.residential@nyserda.ny.gov
- **AUP Support:** AUP@nyserda.ny.gov

How to Submit an Application

The following information will need to be filled out throughout the application process

1. Applicant Information
2. Assistance Information
3. Physical Address Information
4. Home Improvement Project Type
5. Eligibility Details
6. Your Contact Information
7. Landlord Information
8. Utility Information
9. Categorical and Utility Bill Documentation
10. eSignature

How to Submit an Application?

Step 1: Navigate to MyEnergy Home Page and Click **Apply Now**
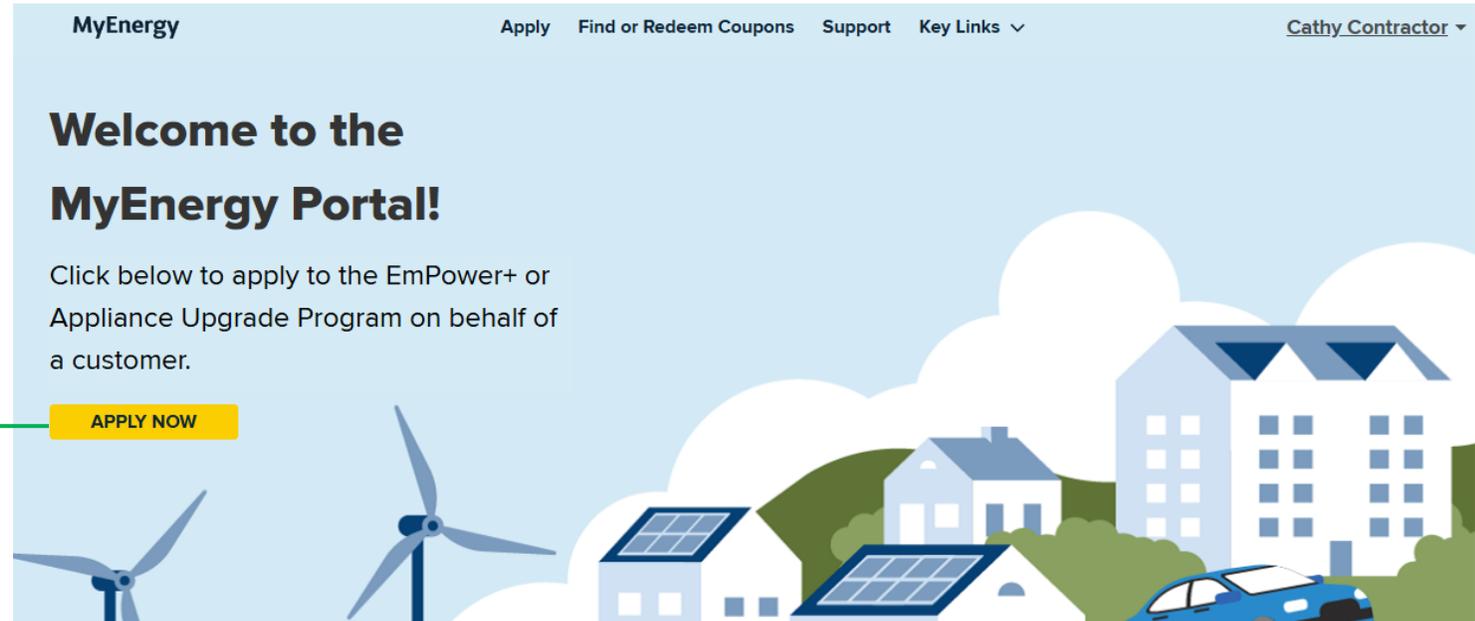
How to Submit an Application?

Get Started

The Applicant must be the Property Owner if the dwelling unit is Property Owner occupied.

* I am submitting on behalf of...

○ Property Owner
○ Renter

If you are submitting this application on behalf of someone else ("the applicant"), you should only proceed if you have the applicant's express consent to do so. Submitting an application without the applicant's consent may constitute a violation of the Contractor Participation Agreement and could result in termination from the Program.

☐ I certify that I have received the consent of the applicant to submit this application on their behalf. I understand that only the Applicant may sign the attestation that is submitted with this application.

NEXT

Step 2. Select Ownership Status and Check box affirming consent of the applicant

Step 3. Enter **No** under Referring Agency Screening then click **Next**

Referring Agency Screening

* On the basis of the information provided by the applicant, the Agency Representative has determined the household eligible for Tier 1 - Low Income Services?

○ Yes   ◉ No

Entity Certifying Eligibility

[▼]

PREVIOUS   **NEXT**

How to Submit an Application?

Assistance Information:
- Contractors may only submit applications for customers with categorical documentation

Step 4. Enter Assistance Information then click **Next**

Assistance Information

* Have any household members received an award letter for public assistance in the past 12 months? ℹ️

◉ Yes ○ No

Income-eligible customers who receive benefits from other select New York State organizations serving low-income residents are considered categorically eligible. These organizations include:

* Check all that apply:

☐ HEAP (Home Energy Assistance Program)

☐ SNAP (Supplemental Nutrition Assistance Program/Food Stamps)/SNAP NYC

☐ SSI (Supplemental Security Income)

☐ TANF (Temporary Assistance for Needy Families)

☐ WAP (Weatherization Assistance Program)

☐ PA (Public Assistance)

If an applicant has received benefits from these services and has an award letter dated within the last 12 months, the household is considered income-eligible and can present this award letter as proof of income documentation. A copy of the award letter must be included with the program application.

* Have you recently received a letter from NYSERDA with a referral code? If you don't know what a referral code is or whether you received one, please answer 'No'.

ℹ️

○ Yes ◉ No

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How to Submit an Application?

☐ Select this box if the address above is incorrect. A field to update your project address will then be displayed.

* Building Type

_____ ▼

* Number of Units

_____

* Number of Bedrooms ⓘ

_____

* Number of People in Household ⓘ

_____

Household includes all individuals living in the dwelling unit, except roomers and boarders who rent a room(s) within a dwelling unit are excluded from the household count. Full-time students who can be claimed as a dependent on another's tax return are excluded from the household count for the rental unit.

Step 5. Enter **Physical Address Information** and Click **Next**

Physical Address Information:

- **Number of People in Household:** If the household includes more than 10 people, please enter 10 as the maximum value.

PREVIOUS   NEXT

How to Submit an Application?

Step 6. Select **Home Improvement Project Type** and Click **Next**

Home Improvement Project Type

* Are you looking for an appliance or considering a whole home upgrade?

Whole Home Upgrade ▼

MORE INFORMATION ABOUT AVAILABLE OPTIONS:

You may only apply to participate in one type of home improvement project at a time. Once you have completed your project you can return to complete a new application.

Appliance

I am looking to purchase and install:

- An electric heat pump clothes dryer
- Electrical panel and/or wiring upgrades that may be needed to install such dryer

Whole Home Upgrade

After completing a residential energy audit, I am looking to install one or more of the following:

- Air sealing, insulation, and ventilation
- Electrical service upgrade (panel box)
- Electrical wiring upgrade
- Heat pump water heaters
- Heat pumps

SAVE FOR LATER

PREVIOUS   **NEXT**

Available Project Types:

Residents may only participate in **one** project at a time; therefore, they have the option to select between **Appliance** or **Whole Home Upgrade**

How to Submit an Application?

Eligibility Details

Great work so far, it looks like you are eligible to apply for the EmPower+ Program.

This program helps households save energy and money toward energy improvements made to their primary residence.

- No-cost comprehensive home energy assessments to pinpoint where energy and dollars are being wasted and receive a customized plan to lower energy usage.
- No-cost direct install improvements identified during the assessment can be installed by participating program contractors.
- Funding toward the cost of energy efficiency improvements, including air sealing, insulation, heat pumps, heat pump water heaters, and electrical service and wiring upgrades.

Low-income, single-family households are eligible for no-cost energy efficiency improvements up to $10,000 per project.
Moderate-income single-family households are eligible for no-cost energy efficiency improvements up to $5,000 per project.

Additionally, part of this program is enabled through Federal funds for the "Home Electrification and Appliance Rebates" (HEAR) Program. HEAR funding is tied to the address at which this project will be completed and is capped at $14,000, which may be available to use for qualifying upgrades.

EmPower+ contractors will help you determine necessary improvements and what you are eligible for during the no-cost home energy assessment and prior to starting the project.

Step 7. Review **Eligibility Details** then Select **Continue Application**

NEW YORK STATE | NYSERDA

How to Submit an Application?

Your (Participating Contractor) Contact Information

*First Name	Middle Initial	*Last Name	Suffix
Cathy		Contractor	

*Primary Phone

(774) 448-8555

Cell Phone

Secondary Phone

SAVE FOR LATER

PREVIOUS   **NEXT**

Step 8. Enter **Your Information** as the participating contractor, (it may be pre-populated) and Click **Next**

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How to Submit an Application?

Applicant Mailing Information

Applicant Mailing Information

Step 9. Enter **Customer Mailing Information** and Click **Next**

☐ Select this box if the Applicant Mailing Address is a P.O. Box.

☐ Select this box if the Applicant Mailing Address is the same as the Applicant Project Address.

Please enter the Applicant Mailing Address below:

* Mailing Address

Apartment or Unit Number

SAVE FOR LATER   PREVIOUS   NEXT

NEW YORK STATE | NYSERDA

How to Submit an Application?

Step 10. Confirm **Applicant Information** and Click **Next**

Applicant Information

General Information

* Applicant First Name
Justin

* Applicant Last Name
Time

Applicant Suffix

* Applicant Phone
(998) 455-6123

* Applicant Primary Language
English ▾

* Applicant Email

☐ Applicant does not have an email address.

SAVE FOR LATER

PREVIOUS   **NEXT**

How to Submit an Application?

Step 11. Enter **Homeowner Information** (if rental property) and
Click **Next**

How to Submit an Application?

Step 12. Enter **Utility Information** and Click **Next**

Utility Information

☐ My household is not responsible for the electric bill, or it is included in my rental fee.

Electric Utility

*Electric Utility Provider ⓘ

[▼]

Error: Electric Utility Provider is required.

*Electric Utility Account Number ⓘ

☐ My household is not responsible for the heating utility bill, or it is included in my rental fee.

Heating Utility

*Primary Heating Fuel Type

[▼]

Secondary Heating Fuel Type

[▼]

List any occupant health issues or special requirements the contractor needs to be aware of. Identify any immediate building concerns, such as a leaking roof, inoperable refrigerators, or faulty heating equipment (maximum length 2,000 characters):

If utility bill is in landlord's name:

Click the check box indicating that the applicant's household is not responsible for the bill

Adding Special Requirements:

Under Utility Information, add any occupant health issues or special requirements to be aware of if applicable

How to Submit an Application?

Step 13. Enter **Partner Information** (if using a campaign code or contractor profile this field should already be populated) and Click **Next**

Partner Information

NYSERDA supports a network of professional energy advisors who may already be assisting you with this program, other NYSERDA programs, utility offerings, and other local resources. If you are currently working with a NYSERDA Clean Energy Hub, please indicate which one below. The program will share project information with them so they can continue to assist you each step of the way. A list of Hubs can be found at nyserda.ny.gov/All-Programs/Regional-Clean-Energy-Hubs.

☐ Check this box to select the next available contractor.

* Contractor Selection

Residential 33676 Smoke Test Acc ▼

If a Regional Clean Energy Hub is assisting you with this application, then please select the Hub below ⓘ

▼

SAVE FOR LATER **PREVIOUS** **NEXT**

NEW YORK STATE | **NYSERDA**

How to Submit an Application?

Step 14. See confirmation that all items have been completed and click **Next**

Looking good so far!

We've checked your application to make sure it's setup as expected. You can now proceed to reviewing your application and uploading documentation.

This Omniscript is saved automatically. To resume the Omniscript later, Copy the link or Email me the link

NEXT

Review Your EmPower+ Application

Application Number - 0001020513

Submitter: Contractor

Submitting this Application on behalf of: Justin Time

CONTRACTOR INFORMATION:

Contractor Name: Señor Residential Test

APPLICANT INFORMATION:

Applicant Name: Justin Time

Language: English

Primary Phone: 9984556123

Project Address: 74 Van Buren Rd

Address 2: 1

Step 15. Review all of the Information entered for this Application and Click **Next**

Application Review:

The following information entered will need to be verified before clicking Next
- Applicant Information
- Program Information
- Address Information
- Award Letter and Referral Information
- Renter Information*
- Homeowner Information*
- Utility Information
- Partner Information

This information will display based on whether the applicant is a Homeowner or Renter

How to Submit an Application?

Step 16. Click **Upload Files** to upload required documentation and Click **Next**

What Documents should I upload?:

- Categorical Eligibility Documentation
- Natural Gas bill or Usage Waiver
- Electric Bill
- Building Owner Certification (if available/applicable)

Upload Documents

Upload Award Letter

Upload a copy of the following: Copy of entire award letter for HEAP, SNAP (Food Stamps), TANF (Temporary Assistance for Needy Families) or Supplemental Security Income dated within the past 12 months. No additional income documentation is required.
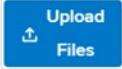
* Categorical Eligibility Documents

Note: Files can not be larger than 5MB.

Name	∨	File Upload	∨	Existing File Name	∨	Status	∨	Notes	∨
HEAP (Home Energy Assistance Program)		Upload Files Or drop							

Add Additional Document

Renter Documents

Note: Files can not be larger than 5MB.

Name	∨	File Upload	∨	Existing File Name	∨	Status	∨	Notes	∨
Building Owner Certification		Upload Files Or drop							

Add Additional Document

Upload Utility Bill(s)

Upload a copy of your itemized electric and gas utility bill and/or bill from a fuel supplier if heating by propane, oil, kerosene, wood, or coal.

Utility Documents

Note: Files can not be larger than 5MB.

Name	∨	File Upload	∨	Existing File Name	∨	Status	∨	Notes	∨
* Electric utility bill		Upload Files Or drop f							
* Gas utility bill and/or bill from a fuel supplier		Upload Files Or drop f							

Add Additional Document

Other Documents

Note: Files can not be larger than 5MB.

File Upload	∨	Existing File Name	∨	Status	∨	Notes	∨

Add Additional Document

SAVE FOR LATER   PREVIOUS   NEXT

NEW YORK STATE | NYSERDA

How to Submit an Application?

Step 17. Click **Next** to generate Docusign for customer signature. Note: Pop-up blockers may prevent users from viewing the pdf

Send your application for customer signature

The last step to complete your application is to obtain customer signature. Please click next to download your application. Once this document is signed and uploaded, your application will be submitted.

Please verify pop-up blockers are disabled in your browser settings, or ensure pop-up blockers are disabled for this page.
- Using Safari? Click here for steps to allow pop-ups.
- Using Chrome? Click here for steps to allow pop-ups.

PREVIOUS   **NEXT**

Application Complete

Step 18. Send application for customer signature

Great job! Your application has been completed. **After uploading the signed document to the application via the "My Projects" section,** your application will be submitted and reviewed by the NYSERDA team.
You can return to the MyEnergy Portal at any time, to check the status of your application in the "My Projects" section on the home page.

If you have any questions in the interim, please feel free to email us at info.residential@nyserda.ny.gov, call us at 866-NYSERDA, or visit our support page.

How to Finalize and View an Application

NYSERDA

How to View and Finalize an Application via MyEnergy?

Step 1. To revisit an incomplete application: Open MyEnergy and Scroll to **My Projects and Applications**

Step 2. Open **Application** under My In-Progress Applications

How to View an Application via MyEnergy?

Step 1. To view a complete application and/or finalize submission: Open MyEnergy and Scroll to **My Projects and Applications**

Step 2. Open **Application** under My Projects

How to View an Application via MyEnergy?

Step 3. To finalize submission, upload the signed application under **Signed Application**

How to View an Application via MyEnergy?

Step 4. To confirm submission, navigate back to the MyEnergy home page and check the **Status**

My Projects

Records per Page   20

Project N... ⌄	Applicant ... ⌄	Applicatio... ⌄	Enrollmen... ⌄	Primary C... ⌄	Status ⌄	Status Re... ⌄	External P... ⌄	Waiting fo... ⌄	Created D... ⌄
EmPower Application 0001020513 Time 12302 Schenectady	Justin Time	0001020513		Residential Te...	Submitted				2/24/2026, 11:...

NEW YORK STATE | **NYSERDA**

How to View an Application via MyEnergy?

∨ Project Information

Status ●
Submitted

Status Reason

Program Name
Combined Residential Application

Application Number ●
0001020513

Submitted Date
2/24/2026, 11:29 AM

Application Signed Date ●
2/24/2026

Leveraged Funds Amount ●
$0.00

Application Received Date ●

Gas Capping Required

Maximum Incentive Amount

Primary Contractor Account
Residential Test Account

Waiting for External Response ●

Waiting For External Response 30 Days

Waiting for External Response Date

Distribution Percentage (%)

Allocation End Date

∨ NYHEP Information

External Project Stage

Migration ID

Step 5. To review details of the submission and status updates, click into the project and scroll down the page to view **Project Information**

Thank you for participating in today's MyEnergy End User Training!

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