<u>NY HP Portal</u> <u>EmPower NY Workflow</u> <u>Appliance Vendor User Guide</u>



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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:

	• <u>.lu</u> 💼		\$		Liz Appliance Log out
	Dashboard Project	cts Program Info	Settings		O Search
All Programs	Click on Projects to see a full list of all your assigned projects	Click on Program Info to see a full list of program news	2	Click to edit company settings	Search for projects by name, address, or project ID
Upload a logo	3 ACTIVE PR		HAVE NEW SSIGNMENTS	Latest Program Info There are no program updates. NYSERDA Contractor Support V	Vebsite
Appliance Vendor	1/		1	This is a list of program on the title to get more d	n news. You can click etail on a specific post
Your company's profile is incomplete. Add missing info »	Click on one of these boxes to see all projects in that category	See all »	S ON-TRACK		
Home	Claim a Reservation	n			
Reports	Reservation number	Last name	Search		

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

	SERDA	.ht	Î		_	Ċ.	Liz Appliance	Log ou
		Dashboard	Projects	Program	m Info	Settings	Search	
		3 Projects						
All Programs	Parat		e 🛟 C	ownload: Pr	ojects 🔟			
Stage	-	Rosemary Al	und				Due in 83 days	
EmPower	3	38 Cotswold Dr North Salem, NY 105	60	EmPower Project ID	: 10830		Next step: Complete Appliance Invoice Submission	
		123-456-7890			Click on the p name to ope	participant on up the	Assigned 2 days ago	
		Geoffrey Sor 38 Cotswold Dr North Salem, NY 105	enson //	EmPower Project ID	proje	CL	New - Action Required Next step: Complete Appliance Invoice Submission	
Assignment Status	-	123-456-7890					Assigned yesterday	
On Track	1	John Smith					Due in 85 days	
Tasks	-	38 Cotswold Dr		EmPower			Next step:	
Current assignment	3	North Salem, NY 105	60	Project ID	: 10851		Complete Appliance Invoice Submission	
Past assignment	15	123-456-7890	200000000000000000000000000000000000000				Assigned 36 minutes ago	
Affiliation	-	line joinsintie en	.rgysuvvy.com			-		
General Projects	3	3 Projects sorted by Due D	Date Ch	eck 'Past see compl	assignment' eted projects			
Other	-					-		
Reopened task	0							
	Reset							

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.'

	山 自 😑 🌣	🔔 Liz Appliance 🛛 Log ou
	Dashboard Projects Program Info Settings	Search
EmBaurar	Complete Appliance Inveice	
EmPower	Complete Appliance Involce	Due in 85 days
John Smith	Submission	
Project ID: 10851	Assigned June 29, 2017	Jump to Timeline 🔻
Next Action	Due date: Sept. 21, 2017	Add Note
Eull Dataile	Extend Due Date This task can not be completed	Refrigerator
Full Details		Type Side by side
Premise View Details »	* Required fields	Size 20
38 Cotswold Dr	Appliance ordering invoice *	Model number 1234588
North Salem, NY 10560	Choose File No file chosen	Hinge left
		Approved cost 500.00
Participant View Details »	Fees associated with the project	Max width 30
liilia+johnsmith@energys.vvy.co	0.00	Max height 65
123-456-7890	Description of fees	Appliance to remove Old fridge will be removed.
Program Info		Notes
Stage Incentive Payment		Freezer
		None
Click 'View De	etails' to see	
additional infor	mation about	
the participant of	ir the premise	Information about the appliance
	Reviewer's Notes	
Click 'Send Now'		
to submit the task		Click 'Save & Save Later'
		to save the inputs and
	Add a Note (optional)	submit the project later
	Send Now Save & Send 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	Due in 85 days	Due in 85 days		
Submission				
Assigned June 29, 2017		Jump to Timeline 🔻		
Due date: Sept. 21, 2017	Add Note			
Extend Due Date This task can not be completed	Refrigerator			
	Туре	Side by side		
* Required fields	Size	20		
Annlin on and sing invoice #	Model number	1234588		
	Hinge	left		
Choose File No file chosen	Approved cost	500.00		
Currently: 38-other-b642fc94e1c115b52c91.pdf	Max width	30		
Fees associated with the project	Max height	65		
0.00	Appliance to remove	Old fridge will be removed.		
Description of fees	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 <u>support.residential@nyserda.ny.gov</u> with questions.