

# NYSERDA Portal: Combined Application Improvements

## Recent Improvements

- Inputs for Weatherization and other Designated Agencies to attest to a customer's income
- Inputs to identify Household members with no income



# NYSERDA Portal: Combined Application Weatherization and other Designated Agencies

When a Weatherization or other designated agency is assisting a customer eligible for services, either the paper or online application may be used.

Income documentation submission is based on who will be determining the customer's eligibility for EmPower services.

Agency	EmPower
No income documentation submission required; agency representative is certifying that they have reviewed the income documentation submitted.	Yes, income documentation submission required; Program will determine eligibility

## Paper

**APPLICATION**  
Weatherization Assistance Program  
EmPower New York Program

The following information will help determine which programs are the most appropriate for you. Please print clearly and complete all sections unless otherwise indicated.

**SECTION A: APPLICANT INFORMATION**

Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
 Address: \_\_\_\_\_ Apt # \_\_\_\_\_ NY State ZIP: \_\_\_\_\_  
 City: \_\_\_\_\_ Primary Phone: \_\_\_\_\_ Secondary Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Mailing Address (if different from above): \_\_\_\_\_  
 Additional Contact Person: \_\_\_\_\_ Relationship to Applicant: \_\_\_\_\_ Phone Number: \_\_\_\_\_

**SECTION B: DWELLING INFORMATION**

☐ I own ☐ I rent ☐ I have lived here \_\_\_\_\_ years. Approximate age of the home: \_\_\_\_\_  
☐ Single-family ☐ Multi-family \_\_\_\_\_ if apt. ☐ Rental/condominium home ☐ Group home/other  
 If you rent, certain agencies require owner consent permission. Please provide owner information below:  
 Owner's Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Who pays for the heat at the dwelling? ☐ I pay ☐ Landlord ☐ Other  
 Who pays for the electric at the dwelling? ☐ I pay ☐ Landlord ☐ Other  
 Does your roof leak? ☐ Yes ☐ No If yes, when? \_\_\_\_\_  
 Do you own your refrigerator? ☐ Yes ☐ No If yes, about how old is it? \_\_\_\_\_ years ☐ No  
 Do you own a second refrigerator? ☐ Yes ☐ No If yes, about how old is it? \_\_\_\_\_ years ☐ No  
 Do you own a separate heater? ☐ Yes ☐ No If yes, about how old is it? \_\_\_\_\_ years ☐ No

**SECTION C: HOUSEHOLD DEMOGRAPHICS**

Total number of members in the household: \_\_\_\_\_  
 Please indicate the number of household members who are:  
 60 years of age or older \_\_\_\_\_ Persons with disabilities \_\_\_\_\_  
 Native American \_\_\_\_\_ Children age 17 years or younger \_\_\_\_\_

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## Online (preferred option)

**NEW YORK STATE OF OPPORTUNITY** | **NYSERDA**

Search: \_\_\_\_\_ Search

[FirstName LastName] ▼

[Submit a New Application](#) | [Projects](#)

### Choose a program

**Combined Residential Application**

Please complete the following application to see if you qualify for a no-cost energy audit and incentives towards making your home more comfortable and energy efficient.

We will ask questions about the number of people living in your home and income sources, your electric and heating fuel providers, and the county where you live to help determine your incentive eligibility.

If you are an electric customer of PSEGLI and have not received a referral letter from NYSERDA, please reach out to your utility for current offers.

# NYSERDA Portal: Combined Application Weatherization and other Designated Agencies

## Paper Application

When an agency is determining EmPower eligibility it's important that this section is fully completed and signed. The *Agency Representative Signature* on the paper application:

1. Certifies that the representative has reviewed the information submitted by the customer.
2. Declares that they have determined the customer eligible for EmPower services.
3. Removes the requirement to submit supporting documentation to the program.

### AGENCY USE ONLY

Reviewed By: ☐ HEAP ☐ OFA ☐ Utility ☐ Weatherization Subgrantee ☐ EmPower ☐ Other: \_\_\_\_\_

Check all benefits that the household receives: ☐ SSI ☐ HEAP ☐ SNAP ☐ TANF

On the basis of the information provided by the applicant, the household is determined to be:

☐ Eligible for Weatherization ☐ NOT Eligible for Weatherization

☐ Eligible for EmPower ☐ NOT Eligible for EmPower ☐ EmPower eligible, but wait-listed for Weatherization

Check here if: ☐ Household was previously served by Weatherization

☐ Household ineligible for further services through EmPower

### Additional Comments:

Agency Representative Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Title: \_\_\_\_\_

Agency: \_\_\_\_\_

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Homes and  
Community Renewal

NYSERDA



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# NYSERDA Portal: Combined Application Weatherization and other Designated Agencies

## Online Application

To more closely align with the paper process, NYSERDA has made improvements to the online application:

1. When a Weatherization or other designated agency user submits an application on behalf of a customer through their contractor portal login, there is a new section on the Eligibility Screening page (Step 4) called Referring Agency Screening.

The Referring Agency Screening section is immediately after the Geographic Eligibility Screening section but before any other eligibility screening sections.

The screenshot displays the 'Geographic Eligibility Screening' section at the top, which contains a message: 'At this time, your address is not located within a geographic eligible territory. Please proceed to the next section.' Below this is the 'Referring Agency Screening' section, which is highlighted with a red arrow. This section includes a text prompt: 'On the basis of the information provided by the applicant, the Agency Representative has determined the household eligible for EmPower New York? \*'. There are two radio buttons, 'Yes' (selected) and 'No'. To the right is a dropdown menu for 'Entity Certifying Eligibility \*' with 'WAP Agency' selected. Below these is the 'Household Demographics' section, which includes a dropdown for 'Household Demographic Details \*' and a dropdown for 'Number of Household Members \*' with '--None--' selected.

**Geographic Eligibility Screening**

At this time, your address is not located within a geographic eligible territory. Please proceed to the next section.

**Referring Agency Screening**

On the basis of the information provided by the applicant, the Agency Representative has determined the household eligible for EmPower New York? \*

☒ Yes ☐ No

Entity Certifying Eligibility \*

WAP Agency

**Household Demographics**

Household Demographic Details \*

Number of Household Members \*

--None--

# NYSERDA Portal: Combined Application

## Weatherization and other Designated Agencies

### Online Application

- The Referring Agency Screening section asks if the Agency Representative has determined if the customer is eligible for EmPower services.
- If yes, select WAP Agency from the *Entity Certifying Eligibility* dropdown and proceed to the Household Demographics section.
  - The user will not fill out the remaining eligibility questions.
  - The user will not be required to upload categorical or income documentation.
- If no, the Referral Code Screening section will appear, and the user will fill out the eligibility sections like any other application.
  - Shared Services will complete the review and determine eligibility.

**Geographic Eligibility Screening**

At this time, your address is not located within a geographic eligible territory. Please proceed to the next section.

**Referring Agency Screening**

On the basis of the information provided by the applicant, the Agency Representative has determined the household eligible for EmPower New York? \*

☒ Yes
 ☐ No

Entity Certifying Eligibility \*

WAP Agency

**Household Demographics**

Household Demographic Details \*

Number of Household Members \*

--None--

# NYSERDA Portal: Combined Application

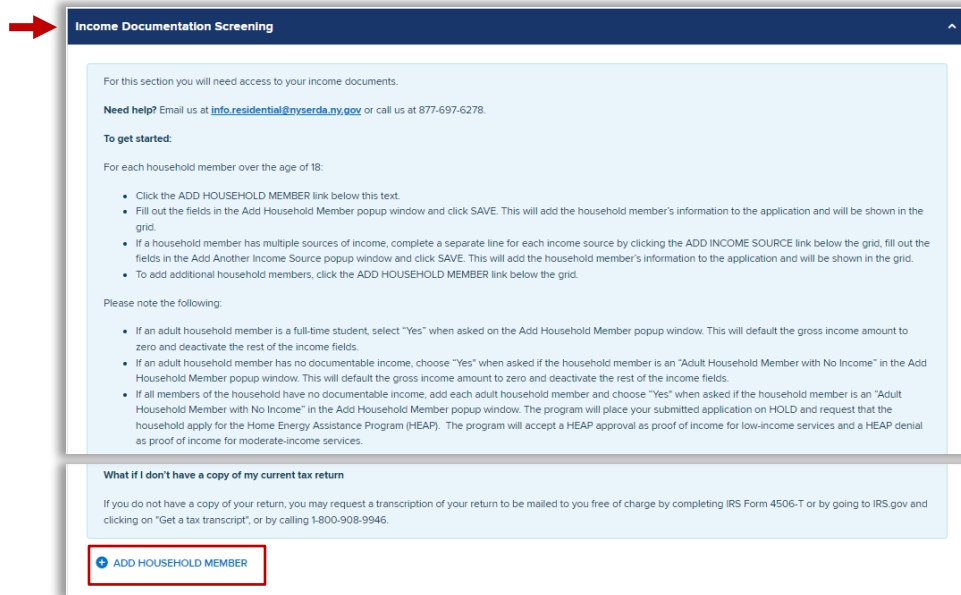
## Household Members with No Income?

If previous qualifiers (*i.e.*, Geographic Eligibility, Referral Letter, Categorical) are not applicable, the Income Documentation Screening section will need to be completed.

NYSERDA has made improvements to the online application to indicate when a household member has no income.

Please enter all adult household members. The following steps need to be repeated for each household member.

1. Click **ADD HOUSEHOLD MEMBER** at the bottom of the section and complete all the fields.



**Income Documentation Screening**

For this section you will need access to your income documents.

**Need help?** Email us at [info.residential@nyserdera.ny.gov](mailto:info.residential@nyserdera.ny.gov) or call us at 877-697-6278.

**To get started:**

For each household member over the age of 18:

- Click the **ADD HOUSEHOLD MEMBER** link below this text.
- Fill out the fields in the Add Household Member popup window and click **SAVE**. This will add the household member's information to the application and will be shown in the grid.
- If a household member has multiple sources of income, complete a separate line for each income source by clicking the **ADD INCOME SOURCE** link below the grid, fill out the fields in the Add Another Income Source popup window and click **SAVE**. This will add the household member's information to the application and will be shown in the grid.
- To add additional household members, click the **ADD HOUSEHOLD MEMBER** link below the grid.

Please note the following:

- If an adult household member is a full-time student, select "Yes" when asked on the Add Household Member popup window. This will default the gross income amount to zero and deactivate the rest of the income fields.
- If an adult household member has no documentable income, choose "Yes" when asked if the household member is an "Adult Household Member with No Income" in the Add Household Member popup window. This will default the gross income amount to zero and deactivate the rest of the income fields.
- If all members of the household have no documentable income, add each adult household member and choose "Yes" when asked if the household member is an "Adult Household Member with No Income" in the Add Household Member popup window. The program will place your submitted application on **HOLD** and request that the household apply for the Home Energy Assistance Program (HEAP). The program will accept a HEAP approval as proof of income for low-income services and a HEAP denial as proof of income for moderate-income services.

**What if I don't have a copy of my current tax return**

If you do not have a copy of your return, you may request a transcription of your return to be mailed to you free of charge by completing IRS Form 4506-T or by going to IRS.gov and clicking on "Get a tax transcript", or by calling 1-800-908-9946.

**+ ADD HOUSEHOLD MEMBER**

# NYSERDA Portal: Combined Application

## Adult Household Member with No Income?

- For adults that are full-time students, choose **Yes** when asked *Full-time student*.
- For adults who do not have documentable income, choose **Yes** to the question *Adult Household Member with No Income?*

When selecting **Yes** to either #2 or #3 the income's *Gross Amount* will default to zero and deactivate the rest of the income fields.

- Click **SAVE** and each household member will be displayed at the bottom of the section.

Jane Public								
AGE	FULL TIME STUDENT?	ADULT WITH NO INCOME?	GROSS AMOUNT	INCOME SOURCE	FREQUENCY	ANNUAL INCOME	VERIFICATION METHOD	EDIT / REMOVE
27	No	Yes	0.00					
ADD INCOME SOURCE								
John Doe								
AGE	FULL TIME STUDENT?	ADULT WITH NO INCOME?	GROSS AMOUNT	INCOME SOURCE	FREQUENCY	ANNUAL INCOME	VERIFICATION METHOD	EDIT / REMOVE
26	No	Yes	0.00					
ADD INCOME SOURCE								

## Adult Full-time Students

Add Household Member

First Name \*  
Jane

Last Name \*  
Public

Age  
27

Full-time student \*  
Yes

Adult Household Member with No Income? \*  
--None--

Gross Amount \*  
0

Income Source \*  
--None--

Frequency \*  
--None--

Annual Income

Verification Method \*  
--None--

SAVE CANCEL

## Adults with No Income

Add Household Member

First Name \*  
John

Last Name \*  
Doe

Age  
26

Full-time student \*  
No

Adult Household Member with No Income? \*  
Yes

Gross Amount \*  
0

Income Source \*  
--None--

Frequency \*  
--None--

Annual Income

Verification Method \*  
--None--

SAVE CANCEL



NYSERDA

# NYSERDA Portal: Combined Application

## Adult Household Member with No Income?

If all members of the household have no documentable income, the program will place the submitted application on HOLD and request that the household apply for the [Home Energy Assistance Program \(HEAP\)](#).

The program will accept a HEAP approval as proof of income for low-income services and a HEAP denial as proof of income for moderate-income services.

Home Energy Assistance Program (HEAP)

Overview

Regular Benefit

Regular Arrears Supplement Benefit

Emergency Benefit

Heating Equipment Repair or Replacement Benefit

Clean and Tune Benefit

Cooling Assistance

Apply for HEAP

Vendor Information

Heating Equipment Repair or Replacement Benefit

The 2021-2022 Heating Equipment Repair and Replacement benefit opened October 1, 2021.

If you are a homeowner and eligible, the Heating Equipment Repair and Replacement benefit can help you repair or replace your furnace, boiler and other direct heating equipment necessary to keep your home's primary heating source working.

Benefit amounts are based on the actual cost incurred to repair or replace your furnace, boiler, and/or other essential heating equipment, \$3,000 for a repair and \$6,500 for a replacement.

You may call your [HEAP Local District Contact](#) to apply. The in-person interview and application requirement is temporarily suspended. Your local district contact will decide if you meet all the eligibility conditions, including the income and resource requirements. The district will provide more information on how to submit the application and required documentation.

Before work is started it must be approved and authorized by a [HEAP Local District Contact](#). Payment is made directly to the vendor after all the work is completed. The participating Heating Equipment Repair vendor list can be obtained by accessing the [HEAP Participating vendor list](#). Select your county of residence, "Furnace Repair" as the fuel type, and pressing "Go".

View [HEAP Monthly Income Limits](#).

If you have an emergency you must contact your [HEAP Local District Contact](#) for assistance. Assistance cannot be provided through this website.