

How to Replace an Electric Utility Account Number in NYHEP

Electric utility account numbers should not be updated frequently, but we understand that there will be times when an update is needed. This could be if there is a placeholder for the account number, or a typo that needs to be corrected. The only way an electric utility account number can be updated is from the Customer Record.

Ways to Search for an Enrollment or Customer in NYHEP

1. From the NYHEP Home Page, hover over the Main Menu tab.
2. You can select **To Do List**, **Enrollments**, **Global Enrollment Search** or **Customers**.
 - a. When selecting **To Do List**, you can search for the enrollment using the customer's name or address or viewing all of your company's accepted enrollments in Workscope Submission.

To Do List

Print Selected Work Orders Bulk Reassign Export Save Search

Click to Hide Search Details...

Account Number

Enrollment Number

Reference Number

Customer Name

Applicant First Name

Applicant Last Name

City

Zip

County

Phone

Created Date

From

To

Due Date

From

To

Program

Trade Ally

Employee

Community Hub - Trade Ally

Community Hub - Employee

Workflow Step

All

Appliance Invoice Submission

Appliance Request

Assessment Started

Assessment Submission

Enrollment Acceptance

Final Project Submission

Heat Pump Installation

Install Started

Workscope Submission

Approved Income Tier

Referral Source

Search

- b. When selecting **Enrollments**, similar fields can be searched.

Enrollment List

New Print Work Order Export to Excel

Click to Hide Search Details...

Enrollment Number 	Account Number 	Install Address 	Enrollment Date From To
Customer Name 	Last Name 	Street 	
Reference Number 	First Name 	Unit 	
	Phone 	City 	
		ZIP/Postal Code 	
		County All	

Trade Ally (Click to Select) **Program** (Click to Select) **Enrollment Status** (Click to Select)

Application Processor - Trade Ally (Click to Select) **Application Processor - Employee** (Click to Select) **Service Provider** (Click to Select)

Project Type (Click to Select) **Approved Income Tier** (Click to Select) **Referral Source** (Click to Select)

Search

- c. When using the **Global Enrollment Search**, you can type in an enrollment number, last name or address.

NEW YORK STATE | **NYERDA UA1 Site**
NY Home Energy Portal

Global Enrollment Search
Search for enrollments...

Search for enrollments by
account number, enrollment number,
reference number, installation address,
or applicant last name.

Announcements

- d. When selecting **Customers**, you can enter the customer's first and last name, or address to locate their Customer Record.

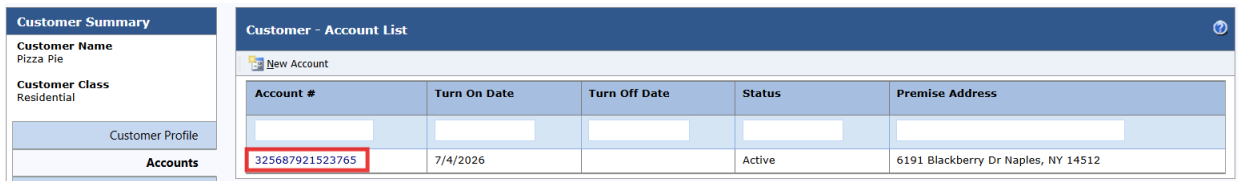
Customer List

New

Search Type: General Search Go ☒ Show Historical ?

3. If you search using 2a, 2b, or 2c, you will be brought to the Enrollment Profile, where you can see the Workflow steps, customer information and a hyperlinked account number on the top left.
- Click on the hyperlinked account number and you will be brought into the Account Details tab of the Customer Profile.
 - If the account number is not hyperlinked, you will need to search for the customer using the customer option from the Main Menu tab.

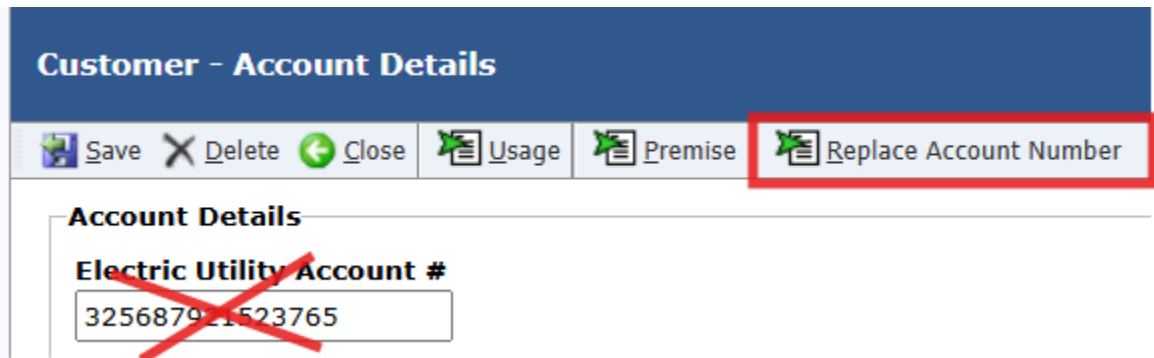
4. If you search using 2d, you will be brought into the Customer Profile where you will need to click on the Accounts tab, then the hyperlinked account number.



The screenshot shows the 'Customer - Account List' interface. On the left is a 'Customer Summary' sidebar with fields for 'Customer Name' (Pizza Pie) and 'Customer Class' (Residential). The main area is a table with columns: 'Account #', 'Turn On Date', 'Turn Off Date', 'Status', and 'Premise Address'. The first row of data has the account number '325687921523765' highlighted with a red box. The status is 'Active' and the address is '6191 Blackberry Dr Naples, NY 14512'.

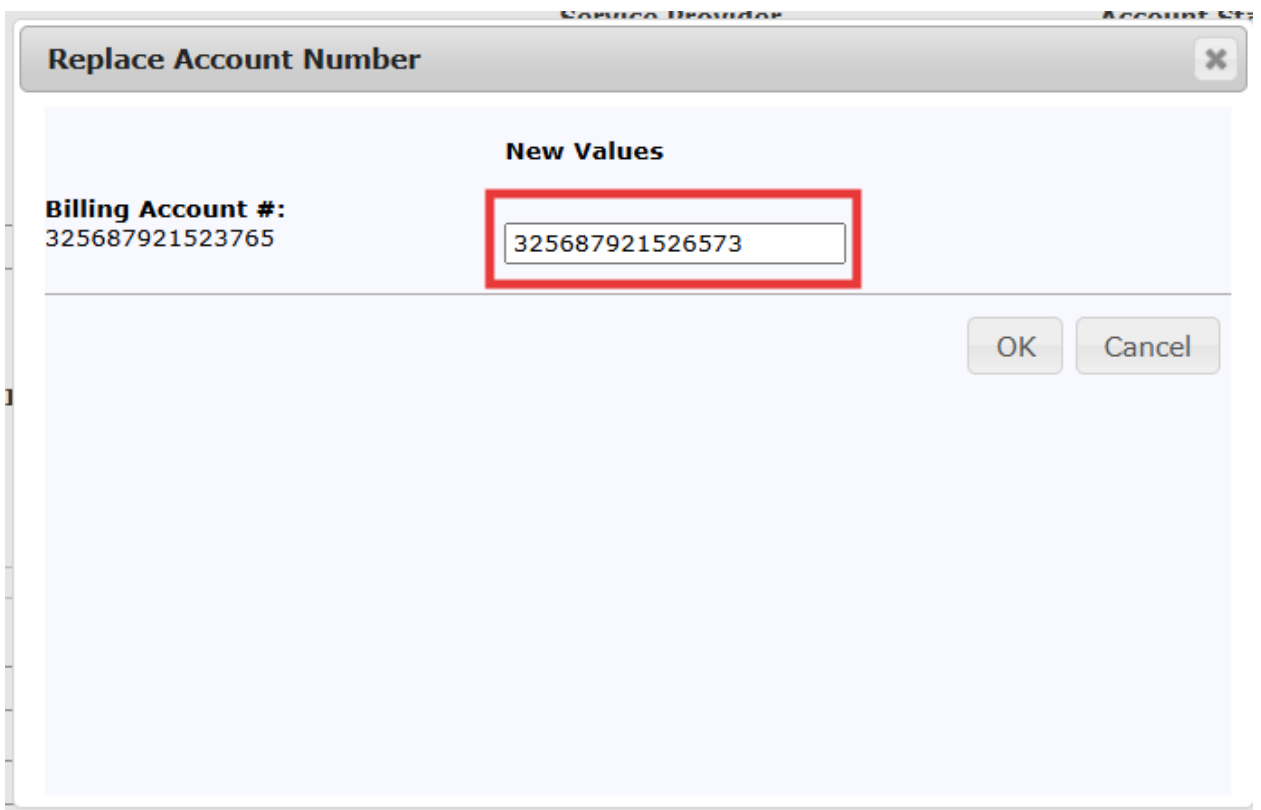
Account #	Turn On Date	Turn Off Date	Status	Premise Address
325687921523765	7/4/2026		Active	6191 Blackberry Dr Naples, NY 14512

5. Once in the Account Details tab of the Customer Profile, **DO NOT** edit the Electric Utility Account #, instead, click on the Replace Account Number button.



The screenshot shows the 'Customer - Account Details' page. At the top is a toolbar with buttons: 'Save', 'Delete', 'Close', 'Usage', 'Premise', and 'Replace Account Number'. The 'Replace Account Number' button is highlighted with a red box. Below the toolbar is the 'Account Details' section, which contains a field for 'Electric Utility Account #' with the value '325687921523765'. A large red 'X' is drawn over this field, indicating it should not be edited.

6. In the popup, you will enter the accurate account number in the 'New Values' field and click OK.



The screenshot shows a 'Replace Account Number' dialog box. It has a title bar with a close button. Inside, there is a section titled 'New Values'. Below this, the label 'Billing Account #:' is followed by the current value '325687921523765'. To the right of this is a text input field containing the new value '325687921526573', which is highlighted with a red box. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

7. The Customer – Account Details will automatically update with the new account number.
8. Navigate back to the enrollment and refresh your browser and the account number should be updated as well.
9. If you did not select the Replace Account Number button and entered the new account number in the Electric Utility Account # field, a Turn on Date will be required and you will need to contact NYSERDA's Residential Participating Customer, Contractor, and Program Partner Support Team at 800-284-9069 or support.residential@nyserda.ny.gov to ask them to relink the account number.