

How to Replace a Gas Utility Account Number in NYHEP

Gas 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. Gas utility account numbers can be updated in the Usage and Fuel Information section of the Workscope Submission stage.

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**.
 - 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
All

Phone

Created Date
From
To

Due Date
From
To

Program
All

Trade Ally
All

Employee
All

Community Hub - Trade Ally
All

Community Hub - Employee
All

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

- | Enrollment List | | | | |
|---|---|--|---|--|
| New Print Work Order Export to Excel | | | | |
| Click to Hide Search Details... | | | | |
| Enrollment Number
<input type="text"/> | Account Number
<input type="text"/> | Install Address
Street
<input type="text"/> | Enrollment Date
From
<input type="text"/> | |
| Customer Name
<input type="text"/> | Last Name
<input type="text"/> | Unit
<input type="text"/> | To
<input type="text"/> | |
| Reference Number
<input type="text"/> | First Name
<input type="text"/> | City
<input type="text"/> | | |
| | Phone
<input type="text"/> | ZIP/Postal Code
<input type="text"/> | | |
| | | County
<input type="text" value="All"/> | | |
| Trade Ally
<input type="text" value="(Click to Select)"/> | Program
<input type="text" value="(Click to Select)"/> | Enrollment Status
<input type="text" value="(Click to Select)"/> | | |
| Application Processor - Trade Ally
<input type="text" value="(Click to Select)"/> | Application Processor - Employee
<input type="text" value="(Click to Select)"/> | Service Provider
<input type="text" value="(Click to Select)"/> | | |
| Project Type
<input type="text" value="(Click to Select)"/> | Approved Income Tier
<input type="text" value="(Click to Select)"/> | Referral Source
<input type="text" value="(Click to Select)"/> | | |
| <div>Search</div> | | | | |

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NYSDA UA1 Site

NY Home Energy Portal

Global Enrollment Search

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

Announcements

- | Enrollment Summary | | Enrollment Profile - Workflow | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--------------------------|---|------------|------------|--------------|----|--|---------------|------------|----------------------|------------|----------|--------------|----|-----------------------|------------|-------------------------|-----------|-----------|---|--|-----------------------|------------------|-------------------|-----------|-----------|---|--|-----------------------|------------|-------------------------|-----------|-----------|---|--|-----------------------|------------------|-------------------|-----------|-----------|---|--|-----------------------|------------|-------------------------|-----------|-----------|---|--|-----------------------|------------------|-------------------|-----------|-----------|---|--|-----------------------|------------|-------------------------|-----------|-----------|---|--|-----------------------|------------------|-------------------|-----------|-----------|---|--|-----------------------|------------|-------------------------|-----------|------------|-----|--|-----------------------|--------------------------|-------------------|------------|------------|---|--|----------------------|--------------------------|------------|------------|--|--|----|
| Program
EmpPower+ | | <div> View Lead Add Workflow Cancel Enrollment Close Double Dip Report </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EXPRESS ELIGIBLE
Account #: 325687921526573
Enrollment #: 1057925
Reference #: 1057925
Status: Open
Contractor Reassignments: 4 | | <table border="1"> <thead> <tr> <th>Workflow Step</th> <th>Trade Ally</th> <th>Disposition / Status</th> <th>Start Date</th> <th>End Date</th> <th>Total # Days</th> <th>WO</th> </tr> </thead> <tbody> <tr> <td>Contractor Assignment</td> <td>CLEAResult</td> <td>Closed - Work Completed</td> <td>4/17/2025</td> <td>4/17/2025</td> <td>1</td> <td></td> </tr> <tr> <td>Enrollment Acceptance</td> <td>Trade Ally 00006</td> <td>Closed - Rejected</td> <td>4/17/2025</td> <td>4/18/2025</td> <td>1</td> <td></td> </tr> <tr> <td>Contractor Assignment</td> <td>CLEAResult</td> <td>Closed - Work Completed</td> <td>4/18/2025</td> <td>4/18/2025</td> <td>1</td> <td></td> </tr> <tr> <td>Enrollment Acceptance</td> <td>Trade Ally 00099</td> <td>Closed - Rejected</td> <td>4/18/2025</td> <td>4/19/2025</td> <td>1</td> <td></td> </tr> <tr> <td>Contractor Assignment</td> <td>CLEAResult</td> <td>Closed - Work Completed</td> <td>4/19/2025</td> <td>4/19/2025</td> <td>1</td> <td></td> </tr> <tr> <td>Enrollment Acceptance</td> <td>Trade Ally 00055</td> <td>Closed - Rejected</td> <td>4/19/2025</td> <td>4/20/2025</td> <td>1</td> <td></td> </tr> <tr> <td>Contractor Assignment</td> <td>CLEAResult</td> <td>Closed - Work Completed</td> <td>4/20/2025</td> <td>4/22/2025</td> <td>2</td> <td></td> </tr> <tr> <td>Enrollment Acceptance</td> <td>Trade Ally 00006</td> <td>Closed - Rejected</td> <td>4/22/2025</td> <td>4/23/2025</td> <td>1</td> <td></td> </tr> <tr> <td>Contractor Assignment</td> <td>CLEAResult</td> <td>Closed - Work Completed</td> <td>4/23/2025</td> <td>10/21/2025</td> <td>181</td> <td></td> </tr> <tr> <td>Enrollment Acceptance</td> <td>Sherri's Test Contractor</td> <td>Closed - Accepted</td> <td>10/21/2025</td> <td>10/21/2025</td> <td>1</td> <td></td> </tr> <tr> <td>Workscope Submission</td> <td>Sherri's Test Contractor</td> <td>Open - New</td> <td>10/21/2025</td> <td></td> <td></td> <td>WO</td> </tr> </tbody> </table> | | | | | | Workflow Step | Trade Ally | Disposition / Status | Start Date | End Date | Total # Days | WO | Contractor Assignment | CLEAResult | Closed - Work Completed | 4/17/2025 | 4/17/2025 | 1 | | Enrollment Acceptance | Trade Ally 00006 | Closed - Rejected | 4/17/2025 | 4/18/2025 | 1 | | Contractor Assignment | CLEAResult | Closed - Work Completed | 4/18/2025 | 4/18/2025 | 1 | | Enrollment Acceptance | Trade Ally 00099 | Closed - Rejected | 4/18/2025 | 4/19/2025 | 1 | | Contractor Assignment | CLEAResult | Closed - Work Completed | 4/19/2025 | 4/19/2025 | 1 | | Enrollment Acceptance | Trade Ally 00055 | Closed - Rejected | 4/19/2025 | 4/20/2025 | 1 | | Contractor Assignment | CLEAResult | Closed - Work Completed | 4/20/2025 | 4/22/2025 | 2 | | Enrollment Acceptance | Trade Ally 00006 | Closed - Rejected | 4/22/2025 | 4/23/2025 | 1 | | Contractor Assignment | CLEAResult | Closed - Work Completed | 4/23/2025 | 10/21/2025 | 181 | | Enrollment Acceptance | Sherri's Test Contractor | Closed - Accepted | 10/21/2025 | 10/21/2025 | 1 | | Workscope Submission | Sherri's Test Contractor | Open - New | 10/21/2025 | | | WO |
| Workflow Step | Trade Ally | Disposition / Status | Start Date | End Date | Total # Days | WO | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Contractor Assignment | CLEAResult | Closed - Work Completed | 4/17/2025 | 4/17/2025 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Contractor Assignment | CLEAResult | Closed - Work Completed | 4/18/2025 | 4/18/2025 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Enrollment Acceptance | Trade Ally 00099 | Closed - Rejected | 4/18/2025 | 4/19/2025 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Contractor Assignment | CLEAResult | Closed - Work Completed | 4/19/2025 | 4/19/2025 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Enrollment Acceptance | Trade Ally 00055 | Closed - Rejected | 4/19/2025 | 4/20/2025 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Contractor Assignment | CLEAResult | Closed - Work Completed | 4/20/2025 | 4/22/2025 | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Enrollment Acceptance | Trade Ally 00006 | Closed - Rejected | 4/22/2025 | 4/23/2025 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Enrollment Acceptance | Sherri's Test Contractor | Closed - Accepted | 10/21/2025 | 10/21/2025 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Workscope Submission | Sherri's Test Contractor | Open - New | 10/21/2025 | | | WO | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Customer: Pizza Pie
Customer Class: Residential
Premise Id: 999999000051028
Service Provider: New York State Electric and Gas | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Applicant
Pie, Pizza
6191 Blackberry Dr
Naples, NY 14512
Ph: (518) 903-6566 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| County: Ontario | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

- b. If the enrollment is at a later step, it will need to be rolled back to Workscope Submission for updating. This is necessary to ensure that the information updates throughout the later stages of the enrollment.
5. Once in the open Workscope Submission step, click on the “Usage & Fuel Information” button on the right sidebar of the page.

Workscope Submission - Applicant Information - New

Process Save Close Expand All Collapse All Enrollment Profile Double Dip Report Update Customer

Processing Information

Community Hub - Trade Ally (Click to Select) Community Hub - Employee (Click to Select) Outcome Work Complete Reason (Click to Select)

Applicant Information

Usage & Fuel Information

Existing Conditions

6. In the Usage & Fuel Information page, you will see a box labeled “Utility Information.” In this box, the Natural Gas Supplier, Primary Heating Fuel Account Number and Primary Heating Fuel POD Number are all editable.
 - a. Enter the correct information in the fields you wish to update. Click “Save” at the top of the page.

Workscope Submission - Usage & Fuel Information - New

Save Close Expand All Collapse All

Utility Information

****Electric Utility Provider**
New York State Electric and Gas

Electric Utility Account Number
325687921526573

****Electric Utility POD Number**
876876876876900

Electric Rate
\$0.20

****Natural Gas Supplier**
NYS Electric and Gas

****Primary Heating Fuel Account Number**

****Primary Heating Fuel POD Number**
020000007771785

Gas Rate
\$1.14

****Primary Heating Fuel Type**
Natural Gas

Secondary Heating Fuel Type
(Click to Select)

7. The enrollment number is now updated. You may navigate away from the page.