



Online Application Instructions

NJCEP- Commercial and Industrial Programs

Introduction

This new on-line application portal is designed to make it easier for customers and contractors to apply for incentives available through the BPU's Clean Energy Program without the need to complete and mail paper applications. Additionally customers and contractors will be able to follow and track the status of their application and ultimately projects.

The portal is available to anyone with an internet connection, not just those with passwords. Visitors have the option of creating an account or submitting applications directly through the portal without having to create an account.

When you click on a link to an application for one of the Commercial and Industrial programs you will see page that looks link the image below:

The screenshot shows the top navigation bar with the BPU logo and 'New Jersey's cleanenergy program' text. On the right, there are links for 'Create Account' and 'Log In', and a secondary menu with 'About Us | Press Room | Library | FAQs | Calendar | Newsletters | Contact Us | Site Map'. Below this is a blue navigation bar with four tabs: 'HOME', 'RESIDENTIAL', 'COMMERCIAL, INDUSTRIAL AND LOCAL GOVERNMENT', and 'RENEWABLE ENERGY'. The main content area is titled 'Gas Water Heater' and contains the following elements:

- A welcome message: 'Welcome! If you have you already created an account, please [login](#).'
- A checkbox: I am submitting the application on behalf of someone else.
- A section titled 'Applicant Contact Information' with the following fields:
 - First Name:
 - Last Name:
 - Email:
 - Confirm Email:
 - Phone Number:
 - Where did you hear about this program?:
- A note: 'If you do not have an email address, you may apply using the [paper form](#).'
- A blue 'Start' button.
- A footer note: 'Please click the start button only once. If you return to this page and click again you will create multiple applications.'

One Time Users/Customers

Customers have the option of creating an account or logging in directly to complete an application. If you expect to be a frequent user of the portal i.e., submitting multiple applications to the programs over time it is recommended that you create an account. This will enable you to save time in completing applications.

The left image below shows what the form looks like to a first-time user. It asks if you have already created an account and provides a link for log in. You can also click login at the top of the page itself.

The image on the right is what shows up for a user that has created an account. Notice how it pre-fills in the applicant information from the logged-in account.

Gas Water Heater

Welcome! If you have you already created an account, please [login](#).

I am submitting the application on behalf of someone else.

Applicant Contact Information

First Name

Last Name

Email

Confirm Email

Phone Number

Where did you hear about this program?

Gas Water Heater

I am submitting the application on behalf of someone else.

Applicant Contact Information

First Name

Last Name

Email

Confirm Email

Phone Number

Where did you hear about this program?

You will notice that the main area includes the basic preliminary information to start an application. You are not required to create an account to apply and you will be given an opportunity to create an account later in the process after applying as well. If you click Login, it will bring you to an authentication page.

Frequent Users/Customers & Contractors

Some customers and contractors will utilize the application portal to help them get new applications in quicker and easier as well as manage their portfolio of projects effectively. This is where the benefit of having an account can offer some time-saving utilities and features that will help them manage their applications. If a user logs in, they will see a slightly different menu at the top of the page.

“View Applications” shows a list of current applications tied to this login account. Applications can be tied to both customer accounts and contractor accounts (applied on behalf of).

HOME		RESIDENTIAL	COMMERCIAL, INDUSTRIAL AND LOCAL GOVERNMENT	RENEWABLE ENERGY
Status	Type	Updated	Application	
Created	Gas Water Heater - FY 2016 Application Form	02/26/16 12:41:12	61d7717-cf83-4c4e-b031-9d039f3c3929	Copy
Created	Gas Water Heater - FY 2016 Application Form	02/26/16 12:17:35	fc17147-9f71-4bba-96f3-b55215ccc7c9	Copy
Created	Refrigeration Controls - FY 2016 Application Form	02/25/16 03:03:58	4e84b76a-91ab-4636-b3c8-660e13a7b1fb	Copy
Created	Geothermal Heatpumps - FY 2016 Application Form	02/25/16 02:52:07	6f36982a-37da-4e33-b92f-229ef6f689f0	Copy
Created	Electric Unitary HVAC - FY 2016 Application Form	02/25/16 02:49:56	4c48747f-b22c-4967-9ae9-452c6dbacd4c	Copy
Created	Electric Chillers - FY 2016 Application Form	02/25/16 02:03:10	2c772979-5438-4a88-9592-c53781d2f259	Copy
Created	Gas Water Heater - FY 2016 Application Form	02/25/16 02:00:54	cc57f516-29cb-435f-8b35-59920a7ff27b	Copy

You will notice that logged-in users have the ability to copy applications, which is covered later in this document.

Contractor can more easily track applications tied to them and have the ability to apply to programs on behalf of customers and pre-fill their data as the contractor. Everything would be similar to above except they would select the check box that says “I am submitting the application on behalf of someone else”.

An important thing to remember is that users cannot fill out an application on behalf of someone else unless they are logged in. They will receive the following popup when logging in.

Enter the applicant's contact information.

I am submitting the application on behalf of someone else.

Applicant Contact Information

First Name

Last Name

Email

Action Required

In order to fill out an application on behalf of another, you must have an account. You can create a new account, or log in using an existing one.

Create Account Login Cancel

Start

Please click the start button only once. If you return to this page and click again you will create multiple applications.

Starting an Application

For this example, we are going to be looking at a Gas Water Heating application. As explained above, you are not required to login to apply online but you can always create an account later and link the application to your account.

Once a user starts an application, the system will e-mail them a link directly to the application. This e-mail will be sent to the address provided on the form. The e-mail will come from EnergyServicesAutomated@trcsolutions.com but may be changed at a later time. At any time during an application, the user can save it and come back later to finish or submit the application.

If a user submits an application on behalf of a Customer, they must make sure to enter the applicants information in, not their own. If submitted, both the contractor submitting the application and the customer they are submitting on behalf of will receive an e-mail with a link to the application.

The user can click the email link to view an application, it will ask for authentication to view the application. You can use the phone number that was entered on the application or you can login to an account if you have one set up.

Authentication Required

We need to verify your identity before you can access this form.

Authenticate by phone number

Please enter the phone number you entered when starting this application to continue.

Phone Number:

Login to your account

Please enter your username and password to continue

E-mail:

Password:

[Forgot Password? Click here to reset.](#)

Once authenticated, it generally brings you to the status page of the application. Navigation from a certain application is on the left hand side.

The Status Page

Lighting Controls Calculations

Applicant	Michael McDonald
Program	Lighting Controls
	FY 2016 Application Form
Status	In Process

My Account

Progress: 0% to 100%

This page shows the overall application status including any milestones completed. This is the page where a user can view the current status of their application as it moves through the process of the programs. Data from our live management system will be shown here including milestones completed and other information.

Application

The actual application page is found by clicking application on the left side menu. Here the user fills out all required project information including proposed measures. The form has basic validation included and required fields will be shown in yellow if they are not filled out correctly.

HOME	RESIDENTIAL	COMMERCIAL, INDUSTRIAL AND LOCAL GOVERNMENT	RENEWABLE ENERGY	
APPLICATION	Gas Water Heating			
SUBMITTALS	Please correct the issues marked below			
SIGNATURE				
TERMS AND CONDITIONS				
STATUS				
Customer Information				
Company Name Target	Doing Business As MYSELF	Installation Start Date 4/1/2016	Electric Utility Atlantic City Electri	Electric Account Number 5468985712
NAICS 123	Complete Date 7/1/2016	Facility Address 10 Heartwood Court	City Clifton Park	State New York
Zip 12065	Type of Project Renovation	Size of Building 5689	Company Mailing Address 10 Heartwood	City Jersey City
State NJ	Zip 01234	Contact Person (Name/Title) Frank	Telephone No. 7858341	Fax No. 1234567891
Incorporated Yes	Tax ID 45678952	Email Address mmcdonald@trcsolutior	Incentive Payment Customer	
Payee Information				
Company Name Target	Contact Name Frank Stark	E-mail Address mmcdonald@trcsolk	Incorporated? Yes	Federal Tax ID# 4567891
Street Address 10 Heartwood Court	City Clifton Park	State New York	Zip 12065	Phone 5183390703
Contractor Information				
Company Name Honeywell	Contact Name Jim James Value cannot be empty.	E-mail Address jimjames@honeywe	Incorporated? Yes	Federal Tax ID# 39483209809
Street Address 1 Test Street	City Testville	State NY	Zip 12345	Phone 5183390703
Water Heating				
Add				
Please correct the issues marked above				

The calculators also have some validation regarding entries for measures. It will alert you when the inputs are not valid for the measure.

Water Heating				
New or Replaced	Gas Water Heating Type	Manufacturer	Model	Area Type
N	W	Test Manufacturer	1032	Retail (Other than
Area Size	Unit Size	Unit Capacity	Unit Efficiency	Quantity
200	25	23	32	2
Estimated Incentive				
\$0.00	Incentive cannot be less than \$0.01.			
Remove				
Add				

Once all the information has been entered and measures have been validated, you can click Submit.

Submittals

The submittals section is where all the required files can be uploaded along with the application information. This may include W9 Forms, Spec Sheets, Utility Bills, Tax Clearance and more depending on the application and type. Required documentation will vary by program.

The screenshot shows the 'Submittals' section of the New Jersey's Clean Energy Program website. The page is titled 'Gas Water Heating' and lists several required documents for upload. Each document entry includes a title, a 'Delete' link, and an 'Upload File' button. The documents listed are: W9 Form for Payee (file: 12-18-2016_Variable_Freq_Drives_Application_6_29_2015v3.pdf), Specification Sheets (file: Attachment_A.png), Utility Bills (file: Attachment_B.png), Purchase Confirmation (only if already completed), and Tax Clearance Certificate (file: NJCEP.jpg). A 'Complete Application' button is located at the bottom of the page.

Navigation: HOME | RESIDENTIAL | COMMERCIAL, INDUSTRIAL AND LOCAL GOVERNMENT | RENEWABLE ENERGY

Application: APPLICATION | **SUBMITTALS** | SIGNATURE | TERMS AND CONDITIONS | STATUS

Gas Water Heating

Please upload the following submittals required by your application.

- W9**
W9 Form for Payee
Delete 12-18-2016_Variable_Freq_Drives_Application_6_29_2015v3.pdf
Upload File
- Specification Sheets**
Manufacturer's specification sheets and performance documentation
Delete Attachment_A.png
Upload File
- Utility Bills**
A copy (all pages) of a recent electric or gas bill depending on the measure implemented from a New Jersey utility which lists the required Societal Benefits Charge and customer name matches the name listed on the application
Delete Attachment_B.png
Upload File
- Purchase Confirmation (only if already completed)**
The application must be submitted within 12 months of equipment purchase. Sufficient documentation must be provided confirming the date of equipment purchase (material invoice, purchase order, etc.)
Upload File
- Tax Clearance Certificate**
The name of the customer listed on the Certificate must match the customer name listed on the utility bill and this application. In addition, the customer tax ID listed on this application must agree with the tax ID listed on the Certificate. Certificates are valid for 180 days and must be valid on the date the Market Manager signs off on the incentive.
Delete NJCEP.jpg
Upload File


You may upload as many submittals as you need by selecting the files and clicking "Upload File". Once all submittals are uploaded click "Complete Application" to continue and sign the application.

[Complete Application](#)

Signature

The signature page allows the user to acknowledge the program rules and effectively "sign" the application without a wet signature.

Change Password | Update Account | View Applications | Log Out
 About Us | Press Room | Library | FAQs | Calendar | Newsletters | Contact Us | Site Map



HOME	RESIDENTIAL	COMMERCIAL, INDUSTRIAL AND LOCAL GOVERNMENT	RENEWABLE ENERGY
APPLICATION	Gas Water Heating		
SUBMITTALS	<p>You're almost done! You just need to sign your application and submit it.</p> <p><input type="checkbox"/> I have read, understand, am in compliance with and agree to abide by all rules and regulations concerning this rebate program, included in the terms and conditions. I certify that all information provided is correct to the best of my knowledge and that I have submitted or will submit all required documents.</p>		
SIGNATURE			
TERMS AND CONDITIONS			
STATUS	<input type="button" value="Submit"/>		

Terms and Conditions


This page is linked from the signature page as well as on the left side menu. This will provide the detailed Terms and Conditions for each individual application.

Linking Applications

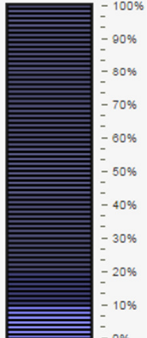
Often times, applications will not be created when logged into an account. In the event the user later creates an account, they may want to link the application to their account so it shows up in their list on the portal.

This can be done by navigating to the application when logged in under their account. On the status page, it will indicate whether it is tied to your account and include a button if it is not. Click "Link to Account" and it will then show up in the users list.

Change Password | Update Account | View Applications | Log Out
 About Us | Press Room | Library | FAQs | Calendar | Newsletters | Contact Us | Site Map



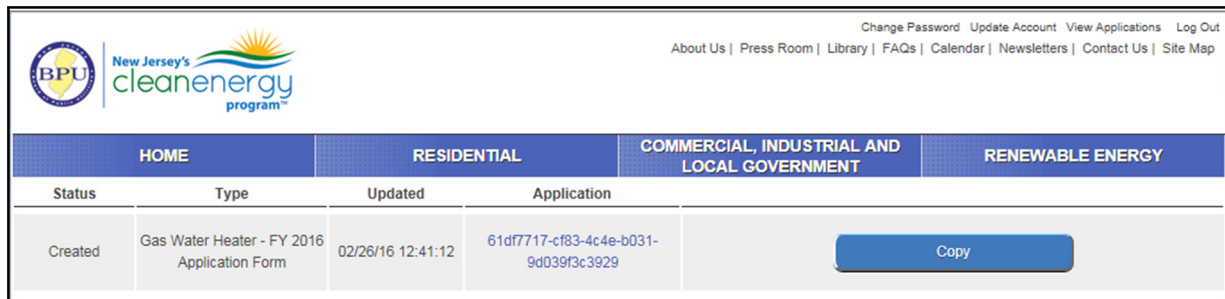
HOME	RESIDENTIAL	COMMERCIAL, INDUSTRIAL AND LOCAL GOVERNMENT	RENEWABLE ENERGY
APPLICATION	Gas Water Heating		
SUBMITTALS	<p>Applicant Michael McDonald Program Gas Water Heater Status FY 2016 Application Form In Process</p>		
SIGNATURE			
TERMS AND CONDITIONS			
STATUS	<p>My Account Copy Application View Your Applications</p> <p>This application is not linked to your account. Click the button below to link it.</p> <p style="text-align: center;"><input type="button" value="Link to account"/></p>		



Copying Applications

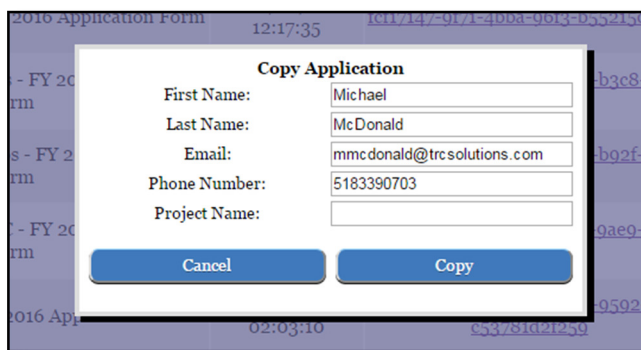
Another useful feature when creating an account is that you can easily copy applications that share much of the same data. This prevents having to enter some data multiple times and it allows you to edit it as needed. You cannot copy applications unless you are logged in.

You can accomplish this from both the “View Applications” page linked at the top menu and from the Status page of a particular application.



The screenshot shows the top navigation bar with the BPU logo and 'New Jersey's Clean Energy Program' branding. On the right, there are links for 'Change Password', 'Update Account', 'View Applications', and 'Log Out'. Below the navigation bar is a menu with four categories: 'HOME', 'RESIDENTIAL', 'COMMERCIAL, INDUSTRIAL AND LOCAL GOVERNMENT', and 'RENEWABLE ENERGY'. Underneath is a table with columns for 'Status', 'Type', 'Updated', and 'Application'. A 'Copy' button is visible next to the application entry.

Status	Type	Updated	Application	
Created	Gas Water Heater - FY 2016 Application Form	02/26/16 12:41:12	61df7717-cf83-4c4e-b031-9d039f3c3929	Copy



The screenshot shows a 'Copy Application' dialog box with the following fields:

- First Name: Michael
- Last Name: Mc Donald
- Email: mmc donald@trcsolutions.com
- Phone Number: 5183390703
- Project Name: (empty field)

At the bottom of the dialog are 'Cancel' and 'Copy' buttons.

If you click copy, it will allow you to change the basic applicant information and project information if necessary, though it will be defaulted to the logged in users information. Once you click copy, it will create the application and return you to the application list.

Checking the Status of an Application

Once the user has submitted an application they can always return to the portal and log in to view the status of their applications. Details of this Status page are mentioned earlier in this document. It will show basic data from the live project database so they will be able to get instant information about the current status of their application.

Questions?

If you have questions about the application process you can call 1-866 NJSMART.