

NYS Clean Heat Program

Project Tracker for ASHP Rebates

Project _____

Assignee Initials	Steps	Link to Webpage
Before Job Starts		All docs below found here
	☐ Manual J for building (verify correct design temp, per calculator)	NEEP Search
	☐ Select NEEP equipment and configuration	
	☐ Design/size ASHPs using load calcs w/ NEEP or manuf. capacity data	
	☐ Clean Heat Calculator Tool (verify design temps, incentive, and heating ratio)	Calculator
	☐ Retrieve eligibility key to verify customer eligibility	Eligibility Tool
	☐ Confirm you have sufficient allocation to cover the project	
	☐ Clear time-stamped before photos (requirements detailed in the Photo Submission Guide)	Photo Submission Guide
	<i>If Int. C.</i> ☐ (Integrated controls) Assure thermostat/relay is on the eligible list	IC Products IC Guidance
	<i>If Decom</i> ☐ Select your Scenario from Decommissioning Checklist	Decommissioning Checklist
Install Project		
	☐ Clear time-stamped before and after photos (requirements detailed in the Photo Submission Guide)	Photo Submission Guide
	☐ If needed, refer to Standards and Procedures for best practices	Checklist
	<i>If Decom</i> ☐ Complete and sign Decommissioning Checklist	Decommissioning Checklist
Post-completion (Have these files ready for Online Intake Tool [OIT])		NYS Clean Heat Rebates
	☐ Manual J (complete file)	NEEP Search Calculator
	☐ NEEP Sheets	
	☐ Calculator Tool (double-check it)	
	☐ Final Invoice reflecting instant incentive deducted	Customer Acknowledgment Form
	☐ Customer Acknowledgment Form (amounts and signatures)	
	☐ Clear time-stamped before and after photos (requirements detailed in the Photo Submission Guide)	Photo Submission Guide
	<i>If Decom</i> ☐ Decommissioning Checklist (signatures)	Decommissioning Checklist
	☐ Organize/rename docs so they are descriptive	
	☐ Project submitted in OIT	

Additional Materials and Resources to Bookmark

- [Con Edison Clean Heat Trainings](#)
- [Clean Heat Connect](#)
- [Clean Heat Shorts](#)
- [NYS Clean Heat Resources for Applications](#)
- [Clean Heat Connect Training Calendar](#)
- [Clean Heat Account Managers and Contacts](#)