

NYS Clean Heat Program

Project Tracker for GSHP 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)	AHRI Search
	☐ AHRI equipment and configuration	
	☐ Design/size GSHPs using load calcs w/ AHRI or capacity data	
	☐ Clean Heat Calculator Tool (verify design temps, incentive, and ratio)	Calculator
	☐ Retrieve eligibility key to verify customer eligibility	Eligibility Tool
	☐ Select your Scenario from Decommissioning Checklist	Decommissioning Checklist
	☐ Clear time-stamped before photos (requirements detailed in the Photo Submission Guide)	Photo Submission Guide
	☐ Contract signed by customer reflecting instant incentive deducted	
	☐ Submit project for pre-approval , including signed customer contract	
Install Project		
	☐ Complete and sign Decommissioning Checklist	Decommissioning Checklist
	☐ 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
Post-completion (Have these files ready for Online Intake Tool [OIT])		NYS Clean Heat Rebates
	☐ Manual J (complete file)	AHRI Search
	☐ AHRI Sheet(s)	
	☐ Capacity Documentation (e.g., LoopLink)	
	☐ Calculator Tool (double-check it)	Calculator
	☐ Final Invoice reflecting instant incentive deducted	Customer Acknowledgment Form
	☐ Customer Acknowledgment Form (amounts and signatures)	
	☐ Decommissioning Checklist (signatures)	Decommissioning Checklist
	☐ Clear time-stamped before and after photos (requirements detailed in the Photo Submission Guide)	Photo Submission Guide
	☐ Bore-well/Loop Field Design (can be a bird's-eye view of the property showing where it is on-site)	
	☐ Organize/rename docs so they are descriptive	
	☐ Project submitted in OIT	

Additional Materials and Resources to Bookmark

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