

NYS Clean Heat Project Tracker for GSHP Rebates



NYS Clean Heat



Project _____

Assignee Initials	Steps	Link to Webpage
Before Job Starts		All docs below found here
	<input type="checkbox"/> Manual J for building (verify correct design temp, per calculator).	
	<input type="checkbox"/> AHRI equipment and configuration.	AHRI Search
	<input type="checkbox"/> Design/size GSHPs using load calcs w/ AHRI or manuf. capacity data.	
	<input type="checkbox"/> Clean Heat Calculator Tool (verify design temps, incentive, and ratio).	Calculator
	<input type="checkbox"/> Customer Acknowledgment Form (including utility account info).	Customer Acknowledgment Form
	<input type="checkbox"/> Invoice . Does ASHP and/or HPWH rebate need line item?	
Install Project		
	<input type="checkbox"/> If needed, refer to Standards and Procedures for best practices.	GSHP Checklist
	<input type="checkbox"/> Clear photos of each outdoor unit installed and model/serial plates.	
	<input type="checkbox"/> Start-up Checklist inclusive of all bullets in item D6 of the GSHP Checklist.	
	<i>If domestic hot water (DHW):</i>	
	<input type="checkbox"/> Desuperheater also being installed? Get an install pic of air handler showing the desuperheater valve connection in frame.	
Post-completion (Have these files ready for Online Intake Tool [OIT].)		NYS Clean Heat Rebates
	<input type="checkbox"/> Manual J (complete file).	
	<input type="checkbox"/> AHRI Sheet(s) .	AHRI Search
	<input type="checkbox"/> Any manufacturer capacity data used (e.g., DSB).	
	<input type="checkbox"/> Calculator Tool (double-check it).	Calculator
	<input type="checkbox"/> Invoice paid in full. (If rebate \$ goes to contractor, \$ deducted from total.)	
	<input type="checkbox"/> Customer Acknowledgment Form (amount and signature).	Customer Acknowledgment Form
	<input type="checkbox"/> Start-up Checklist (D6 items on GSHP Checklist).	
	<input type="checkbox"/> Bore-well/Loop Field Design (can be a bird's-eye view of the property showing where it is on-site).	GSHP Checklist
	<input type="checkbox"/> Photos of all condensers (one mod/serial and install pic per unit).	
	<i>If DHW:</i>	
	<input type="checkbox"/> If desuperheater install , get an install pic of air handler showing the desuperheater valve connection in frame.	
	<input type="checkbox"/> Organize/rename docs so they are descriptive.	
	<input type="checkbox"/> Project submitted in OIT.	

Additional Materials and Resources to Bookmark

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