

# NYS Clean Heat Project Tracker for ASHP Rebates



NYS Clean Heat



Project \_\_\_\_\_

Assignee Initials	Steps	Link to Webpage
	<b>Before Job Starts</b>	<a href="#">All docs below found here</a>
	<input type="checkbox"/> <b>Manual J</b> for building (Verify correct design temp.)	
	<input type="checkbox"/> Select NEEP equipment and configuration.	<a href="#">NEEP search</a>
	<input type="checkbox"/> Design/size ASHPs using load calcs w/ NEEP or manuf. capacity data.	
	<input type="checkbox"/> <b>Clean Heat Calculator Tool</b> (Verify design temps, incentive, and ratio.)	<a href="#">Calculator</a>
	<input type="checkbox"/> <b>Customer Acknowledgment Form</b> (including utility account info)	<a href="#">Cust. Ack. Form Statewide</a>
	<input type="checkbox"/> <b>Invoice.</b> Does ASHP and/or HPWH rebate need line item?	
	<i>If Int. C.</i> <input type="checkbox"/> (Integrated controls) Assure thermostat/relay is on the eligible list.	<a href="#">IC Products</a> <a href="#">IC guidance</a>
	<i>If Decom</i> <input type="checkbox"/> Select your Scenario from <b>Checklist</b> .	<a href="#">Decom Checklist</a>
	<input type="checkbox"/> Take <b>"before"</b> pictures of fossil fuel boiler/furnace.	
	<b>Install Project</b>	
	<input type="checkbox"/> If needed, refer to <b>Standards and Procedures</b> for best practices.	<a href="#">ASHP Checklist</a>
	<input type="checkbox"/> <b>Clear photos</b> of each outdoor unit installed & model/serial plates.	
	<i>If HPWH</i> <input type="checkbox"/> <b>HPWH</b> also being installed? Get pics of install & mod/ser.	
	<i>If Int. C.</i> <input type="checkbox"/> <b>Configuration/set-up photos</b> (pics of thermostat screen and/or relay)	<a href="#">IC guidance</a>
	<i>If Decom</i> <input type="checkbox"/> <b>Decommissioning form</b> signed.	<a href="#">Decom Checklist</a>
	<input type="checkbox"/> Take <b>"Before"</b> pics, if still needed.	
	<input type="checkbox"/> Take <b>"After"</b> pics of steps taken and/or removed equipment.	
	<b>Post-completion (Have these files ready for Online Intake Tool [OIT].)</b>	<a href="#">NYS Clean Heat Rebates</a>
	<input type="checkbox"/> <b>Manual J</b> (complete file)	
	<input type="checkbox"/> <b>NEEP Sheets</b>	<a href="#">NEEP search</a>
	<input type="checkbox"/> Any <b>manufacturer capacity data</b> used (e.g., DSB) if your Man J design temp is <+5F	
	<input type="checkbox"/> <b>Calculator Tool</b> (Double check it.)	<a href="#">Calculator</a>
	<input type="checkbox"/> <b>Invoice</b> paid in full (If rebate \$ goes to contractor, \$ deducted from total.)	
	<input type="checkbox"/> <b>Customer Acknowledgment Form</b> (amount and signature)	<a href="#">Cust. Ack. Form Statewide</a>
	<input type="checkbox"/> <b>Photos</b> of all condensers (one mod/serial and install pic per unit)	
	<i>If HPWH</i> <input type="checkbox"/> <b>HPWH install</b> , photos of install & mod/ser	
	<i>If Int. C.</i> <input type="checkbox"/> <b>Set-up photos</b>	<a href="#">IC guidance</a>
	<i>If Decom</i> <input type="checkbox"/> <b>Decommissioning Checklist</b>	<a href="#">Decom Checklist</a>
	<input type="checkbox"/> Take <b>before/after</b> photos	
	<input type="checkbox"/> Organize/rename docs so they are descriptive.	
	<input type="checkbox"/> <b>Project submitted</b> in OIT (multi-project tracker updated.)	

## Additional Resources

- [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](#)