

# OIT Tips and Tricks for Application



NYS Clean Heat



**nationalgrid**



**1**

For the Project Information Tab (first page of OIT), have the following documents in front of you for reference: Prescriptive Calculator, Manual J Load Report, Acknowledgement Form, and Invoice.

**2**

OIT will timeout if you can't fill in all required fields within 20 minutes.

**3**

If asked to resubmit an application due to missing equipment, you can use the copy function if the application is in Application Received, Action/Attention Required, or Application Rejected statuses. Must be for the same utility.

**4**

Questions about NYSERDA funding relate to any additional rebates that the customer may have received for the heat pumps from a program OTHER THAN Clean Heat. It's not related to funding for envelope or other appliance improvements.

**5**

If the installation was a New Construction or Gut Rehab, you need to provide a heating system avoided by installing the heat pump; select the most probable fossil-fuel alternative.

**6**

For the Improvements Tab, have the following documents in front of you for reference: Prescriptive Calculator, AHRI or NEEP sheets (depending on equipment type), and nameplate photos.

**7**

Rule of thumb: There should be 1 separate improvement for every condenser attached to the units listed in your Prescriptive Calculator.  
*—If integrated controls or decommissioning are part of the project, add 1 improvement for either 2A or 2B.*

**8**

Always add all improvements before uploading documents. The Supporting Documents checklist is informed by the specific improvements you add. If you forget an improvement type, you may not see the full list of documents needed.

**9**

When browsing your computer for files to submit, you're only able to select one at a time. To alleviate the upload burden, consider combining multiple documents into a single file. Make sure that those combined files don't exceed the maximum file size of 10MB.

**10**

In the Rebate Assignment section, if there is no company associated with the project, enter the customer's first and last name in the "Payee Company Name" field.