Online Application Instructions

NJCEP- Commercial and Industrial Programs

Introduction

This new on-line application portal is designed to make it easier for customers and contractors to apply for incentives available through the BPU’s Clean Energy Program without the need to complete and mail paper applications. Additionally customers and contractors will be able to follow and track the status of their application and ultimately projects.

The portal is available to anyone with an internet connection, not just those with passwords. Visitors have the option of creating an account or submitting applications directly through the portal without having to create an account.

When you click on a link to an application for one of the Commercial and Industrial programs you will see page that looks link the image below:
One Time Users/Customers

Customers have the option of creating an account or logging in directly to complete an application. If you expect to be a frequent user of the portal i.e., submitting multiple applications to the programs over time it is recommended that you create an account. This will enable you to save time in completing applications.

The left image below shows what the form looks like to a first-time user. It asks if you have already created an account and provides a link for log in. You can also click login at the top of the page itself.

The image on the right is what shows up for a user that has created an account. Notice how it pre-fills in the applicant information from the logged-in account.
You will notice that the main area includes the basic preliminary information to start an application. You are not required to create an account to apply and you will be given an opportunity to create an account later in the process after applying as well. If you click Login, it will bring you to an authentication page.

Frequent Users/Customers & Contractors
Some customers and contractors will utilize the application portal to help them get new applications in quicker and easier as well as manage their portfolio of projects effectively. This is where the benefit of having an account can offer some time-saving utilities and features that will help them manage their applications. If a user logs in, they will see a slightly different menu at the top of the page.
“View Applications” shows a list of current applications tied to this login account. Applications can be tied to both customer accounts and contractor accounts (applied on behalf of).

You will notice that logged-in users have the ability to copy applications, which is covered later in this document.

Contractor can more easily track applications tied to them and have the ability to apply to programs on behalf of customers and pre-fill their data as the contractor. Everything would be similar to above except they would select the check box that says “I am submitting the application on behalf of someone else”.

An important thing to remember is that users cannot fill out an application on behalf of someone else unless they are logged in. They will receive the following popup when logging in.
Starting an Application

For this example, we are going to be looking at a Gas Water Heating application. As explained above, you are not required to login to apply online but you can always create an account later and link the application to your account.

One a user starts an application, the system will e-mail them a link directly to the application. This e-mail will be sent to the address provided on the form. The e-mail will come from EnergyServicesAutomated@trcsolutions.com but may be changed at a later time. At any time during an application, the user can save it and come back later to finish or submit the application.

If a user submits an application on behalf of a Customer, they must make sure to enter the applicants information in, not their own. If submitted, both the contractor submitting the application and the customer they are submitting on behalf of will receive an e-mail with a link to the application.

The user can click the email link to view an application, it will ask for authentication to view the application. You can use the phone number that was entered on the application or you can login to an account if you have one set up.
Once authenticated, it generally brings you to the status page of the application. Navigation from a certain application is on the left hand side.

The Status Page

This page shows the overall application status including any milestones completed. This is the page where a user can view the current status of their application as it moves through the process of the programs. Data from our live management system will be shown here including milestones completed and other information.

Application

The actual application page is found by clicking application on the left side menu. Here the user fills out all required project information including proposed measures. The form has basic validation included and required fields will be shown in yellow if they are not filled out correctly.
The calculators also have some validation regarding entries for measures. It will alert you when the inputs are not valid for the measure.
Once all the information has been entered and measures have been validated, you can click Submit.

**Submittals**
The submittals section is where all the required files can be uploaded along with the application information. This may include W9 Forms, Spec Sheets, Utility Bills, Tax Clearance and more depending on the application and type. Required documentation will vary by program.

**Signature**
The signature page allows the user to acknowledge the program rules and effectively “sign” the application without a wet signature.
Terms and Conditions
This page is linked from the signature page as well as on the left side menu. This will provide the detailed Terms and Conditions for each individual application.

Linking Applications
Often times, applications will not be created when logged into an account. In the event the user later creates an account, they may want to link the application to their account so it shows up in their list on the portal.

This can be done by navigating to the application when logged in under their account. On the status page, it will indicate whether it is tied to your account and include a button if it is not. Click “Link to Account” and it will then show up in the users list.
Copying Applications

Another useful feature when creating an account is that you can easily copy applications that share much of the same data. This prevents having to enter some data multiple times and it allows you to edit it as needed. You cannot copy applications unless you are logged in.

You can accomplish this from both the “View Applications” page linked at the top menu and from the Status page of a particular application.

If you click copy, it will allow you to change the basic applicant information and project information if necessary, though it will be defaulted to the logged in users information. Once you click copy, it will create the application and return you to the application list.

Checking the Status of an Application

Once the user has submitted an application they can always return to the portal and log in to view the status of their applications. Details of this Status page are mentioned earlier in this document. It will show basic data from the live project database so they will be able to get instant information about the current status of their application.

Questions?

If you have questions about the application process you can call 1-866 NJSMART.