

## Energy Affordability Guarantee Pilot Program

### Application Guide

This guide is intended to walk through how to complete an application for the Energy Affordability Guarantee (EAG) Pilot Program. It will provide step-by-step instructions on how to complete the application and income verification process.

### Information You'll Need

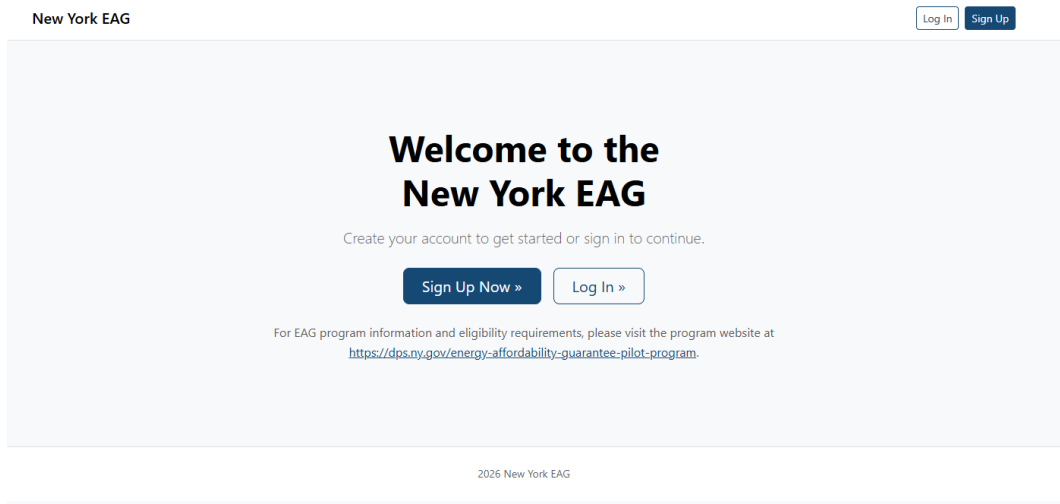
Information Needed	Why Is This Needed?	Where Can I Find This? + Other Details
<b>Email Address</b>  <b>Phone Number</b>	This will be used by the program administrator to contact you with program updates, new bill credits, or if additional information is needed on your application.	Enter your own email address and phone number. If you don't have an email address or phone number, you can use that of a close friend or family member, or call the Program Administrator for assistance.
<b>Electric Utility Name</b>  <b>Electric Utility Account Number</b>	This will be used to locate your information in NYSERDA EmPower+ data, and coordinate with your Electric Utility on applying credits.	This can be found on a copy of your electric bill. If you are unsure of the correct information, <a href="#">contact your electric utility</a> .
<b>Gas Utility Name</b>  <b>Gas Utility Account Number</b>	This will be used to gather data on your historic gas usage prior to installing heat pumps.	This can be found on a copy of an old gas bill. If you are unsure of the correct information, <a href="#">contact your old gas utility</a> .
<b>Street Address</b>	This will be used to verify your residence was serviced by NYSERDA's EmPower+ program.	If you don't know your full address, it can be found on any piece of mail you have received.
<b>Copy of Your Most Recent Electric bill</b>	This is used to verify the name of your electric utility and your account number.	Your electric bill is likely sent electronically via email or via physical mail. It can also be accessed if you have an account on your electric utility's website.

Information Needed	Why Is This Needed?	Where Can I Find This? + Other Details
<b>Housing Details</b>	Information on your housing type, household size, and own/rent status allows the Program Administrator to ensure your program eligibility.	Consider the type of housing you live in (single-family home, 1-4 unit building, etc.), and how many people live with you in your residence (family members, roommates, etc.). Additionally, consider whether you pay rent to live there or if you own your residence.
<b>Household Income</b>	Information on your household income allows the Program Administrator to correctly calculate your Guarantee credit.	Please see <a href="#">Appendix C</a> for full information on how to calculate and document your household income.  <u>Note:</u> this information is <b>NOT</b> used to determine program eligibility, except in limited cases where participants move to a new residence.
<b>Tax Filing Information</b>	Information on your tax status allows the Program Administrator to correctly calculate your Guarantee credit.	Includes questions such as: <ul style="list-style-type: none"> <li>• Did you file taxes last year?</li> <li>• Was your most recent tax return filed jointly?</li> </ul> Please see <a href="#">Appendix A</a> for definitions of relevant tax terms.  <u>Note:</u> this information is <b>NOT</b> used to determine program eligibility, except in limited cases where participants move to a new residence.
<b>Social Security Number</b>	This is used to verify your tax filing status and income with the IRS, and apply the correct credit amount.	If you do not know your Social Security Number, it is listed on your Social Security Card. It may also be listed on recent tax forms (W-2s, 1099s), pay stubs, W-4 forms, or banking documents.
<b><a href="#">Form 8821</a> and <a href="#">Consent Form 1177</a></b>	These forms are required to provide consent to the Program Administrator team to access IRS tax data.	Copies of this form are available for download on the income-verification section of the application within the program portal. <a href="#">Click here to see detailed instructions.</a>

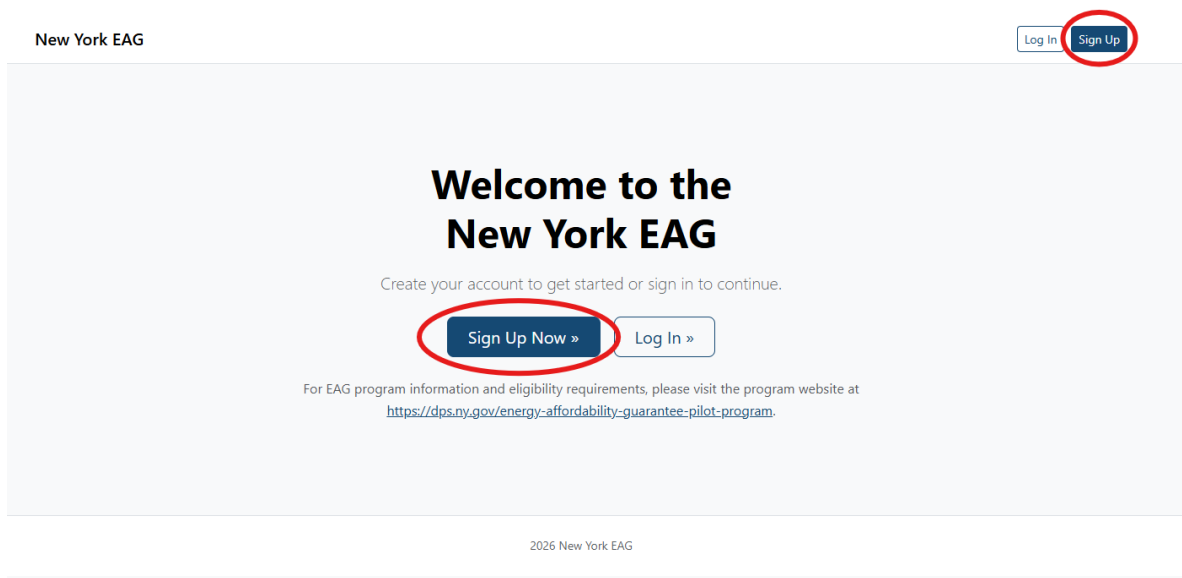
## Account Creation

The first step in the process is to create an account on the program portal.

1. First, visit <https://portal.nyeag.com/>. You will encounter a page that looks like the screenshot below.



2. To get started, click the “Sign Up Now” button in the middle of the screen, or the “Sign Up” button in the top right.



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3. You will first be prompted to enter your personal details, including name, email, and phone number. If you do not have an email address or phone number yourself, we recommend that you use that of a trusted family member, friend, or advisor.

For additional help/support, we recommend that you contact the program administrator at 877-402-0095 or [admin@nyeag.com](mailto:admin@nyeag.com). You can also contact your local Clean Energy Hub, who may also be able to assist you in completing an application. Visit [Find Your Clean Energy Hub Today - NYSEERDA](#) to determine which Hub you are served by and how to get help.

The screenshot shows a web form titled "Personal Details" with a progress indicator "1". The form includes a profile icon placeholder, the heading "Enter your Personal Details", and four input fields: "First name \*", "Last name \*", "Email \*", and "Phone Number \*". The email field contains "my@mail.com" and the phone number field contains "123-123-1234". Below the fields is a checkbox labeled "Subscribe to Email Updates" which is checked. A dark grey "Next" button is at the bottom.

4. You will then be prompted to create a password for your account. The password must be at least eight characters long, and it must include at least one number and special character (Allowed: [ , ], @, !, #, \$, %, &, ?, \*, ^, (, ), \, ', and "). Be sure to safeguard this password for future use.

2  
Set your Password

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...

## Set your password

Must be at least 8 characters, include 1 number  
and a special character (Allowed: [ , ] , @ , ! , # , \$ , % , & , ? , \* , ^ , ( , ) , \ , ' , " )

Password \*

Confirm Password \*


Next

Go back

5. Once you have set your password, the portal will send an email to the listed email address to verify your email address and activate your account. If you do not find the email, check your spam or junk folders.

3  
Email Verification

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## Verify your Email Address

We've sent an email to [marshdean525@gmail.com] to verify your email address and activate your account. The link in the email will expire in 24 hours.

Didn't receive an email? [Resend email.](#)

Click blue button to confirm your registration.

From: New York EAG - Admin <admin@nyeag.com>  
Date: Tue, Jan 27, 2026 at 2:06 PM  
Subject: Confirm New York EAG registration  
To: [REDACTED]

Please click the button below to confirm your New York EAG registration (expires in 5 minutes)



- Now, you can revisit <https://portal.nyeag.com> and login using the email and password you have created. Please note that after you enter your email and password, a verification code will be sent to your email, and you will be prompted to enter this to login. If you do not find the email, please check your spam or junk folders.

## Log in to your Account

Email

Password

Remember me [Forgot password?](#)

Verify your Identity

You have received an email which contains your two-factor authentication code.

Enter 6-Digit 2FA Code

6 - D i g i t C o d e

Didn't receive an email? [Resend code.](#)

Trust this computer for 30 days

Log in

[Try to login again?](#)

## Submitting an Application

Now that you have created an account, you can begin submitting an application to the EAG Pilot Program.

1. After logging in, you will be brought to a page to fill out the application. Please note that you must enter all of the required information and click “Next” at the bottom of the page in order to save the information entered on the application.
2. The first field prompts you to enter your electric utility account number. We’ll use the number to search our records for your account information and fill out parts of the application for you.
  - a. If the account number and name you entered do not match a record in our system, it does not necessarily mean you are ineligible for the program. This can happen if the information on your bill is listed differently in our system. In this case, type in the rest of your information below.

Jane Doe

## Profile Information

Update your personal information and address details

### Search Your Utility Account Information

Electric Utility Account Number

Look up

### User Information

First Name: Jane	Last Name: Doe
Phone: [REDACTED]	Email: [REDACTED]

3. Enter your address information. All of the fields are required as indicated.

### Address Information

Street Address **Required**

Apartment/Suite (Optional)

City **Required** ZIP Code **Required**

State **Required** County **Required**

4. Next, enter your utility account information. This includes both electric and gas utilities. You might have different account numbers for your electric and gas accounts, even if you receive them from the same company. Also, please indicate whether you have ever used delivered fuels at this address. This may include oil, propane, wood, biomass pellets, kerosene, or others. If you select Yes, you will be prompted to indicate what kind of delivered fuel you used. Lastly, you will be prompted to upload a copy of your most recent electric utility bill so we can verify your electric account number.

## ⚡ Utility Accounts

Electric Utility **Required**

Select an Electric Utility

Gas Utility **Required**

Select a Gas Utility

Gas Utility Account Number (if different)

Have you ever used delivered fuels at your current address (oil, propane, wood, biomass pellets, kerosene, etc.) **Required**

Yes  No

Upload Most Recent Electric Utility Bill **Required**

Please include all pages of your electric utility bill and ensure that your name, address, and account number are all legible.

Choose File No file chosen

Accepted formats: PDF, JPG, PNG.

- Next, you will be prompted to enter information about your housing and household income levels. You will need to indicate whether you own or rent your home, the type of housing you reside in, the number of people in your household, and whether you filed taxes last year. Please note that tax information is **NOT** used to determine program eligibility or disqualify participants – it is only used to determine the correct guarantee credit to apply.

## 🏠 Housing and Income Details

Own or Rent **Required**

Select One

Housing Type **Required**

Select One

Number of People in Your Household **Required**

Select One

Filed Taxes Last Year **Required**

Yes  No

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6. Lastly, you will need to confirm that you give your Utility consent to share your monthly billing information with the Program Administrator for the purposes of calculating your bill credit. Check the box after reviewing the statement, then click “Next”.

## Data Sharing Consent

Consent to share utility data Required

I, **Jane Doe** agree and authorize my electric and gas utility's sharing of my monthly billing information for two years prior to my participation in the Energy Affordability Guarantee Pilot (Pilot) including electric and gas consumption and associated cost, and my monthly electric billing information going forward for the duration of my participation in the Pilot, including electricity consumption, associated cost, the amount of monthly Energy Affordability Program credits or other bill credits such as those associated with the Home Energy Assistance Program or a community solar subscription received, and my participation in budget billing or deferred payment agreement programs, or in arrears with New York State Department of Public Service (DPS) Staff and its agents or authorized representatives for the purposes of supporting my participation in the Pilot. I agree and authorize NYSERDA to share the information provided in my EmPower+ application and the details of my EmPower+ project with New York State DPS Staff and its agents or authorized representatives for the purposes of supporting my enrollment into the Pilot. I also agree and authorize the DPS Staff and its agents or authorized representatives to share my participation status in the Pilot with my electric and/or gas utility and NYSERDA, including its agents or authorized representatives.

## Income Verification

In order to determine the level of bill credit you are eligible for, the Program Administrator needs to conduct income verification.

1. After completing the information part of the application, you will be returned to a home page like this. On the left side of your screen you will see an application status of “iverify-needed”, indicating that you still need to verify your income. In the red box titled “Income Verification Needed”, click the “Start Income Verification” button to get started.

NEW YORK STATE Department of Public Service Energy Affordability Guarantee Pilot Program

Jane Doe

Dashboard

Back to Dashboard

**Income Verification Needed**

We need your authorization to verify your income to determine the amount of the incentive you're eligible for under this program.

Start Income Verification

Application

Your Application Status: I verify-needed

Contact Us

2. This will bring you to a new page where you can provide your address and tax information. First, you will need to fill in your current name and address information, including street address, apartment or suite, city, state, and ZIP Code. Phone number is required in case any questions arise regarding your application.

## Section 1: Current Name and Address

First & Last Name **REQUIRED**

Email **REQUIRED**

Street **REQUIRED**

Apartment or Suite

City **REQUIRED**

State **REQUIRED**

Zip **REQUIRED**

Phone Number **REQUIRED**

## Section 1: Address Instructions

Please enter current name, address (including apt., room, or suite no.), city, state, and ZIP code. If you use a PO Box, please include it.

Please include your phone number in the event any questions arise regarding your application.

3. Next, you will enter some information on your most recent tax return and your social security information. Please note that tax information is **NOT** used to determine program eligibility or disqualify participants – it is only used to determine the correct guarantee credit to apply.

## Section 2: Tax Return Information

Does your current address **EXACTLY MATCH** the address on your last tax return? **REQUIRED**

- Yes  
 No

I did not file income taxes last year since my income was less than the minimum required to file taxes.

While this is a request for sensitive personal information, this is a secure portal and all social security numbers are encrypted.

Social Security Number **REQUIRED**

Enter in the format 123-12-1234.

Please re-enter your SSN **REQUIRED**

## Section 2: Tax Return Instructions

Please ensure that the address listed in your income verification matches the address on your most recent 1040 form exactly.

If the address you provided above is the same as the one on your most recent 1040 form, select "Yes."

If the address above is different from the one on your most recent 1040 form, select "No." Then, provide your correct address here.

- Next, you will enter some information on household size and indicate whether your most recent tax return was filed jointly.

## Section 3: Joint Returns

(If applicable)

Was your most recent tax return filed jointly? **REQUIRED**

- Yes  
 No

## Household Size

Number of Household Members Including Yourself **REQUIRED**

## 18 or Younger

Number of Household Members Under 18 **REQUIRED**

## Extra Adults

Extra Household Member 1 **REQUIRED**

## Section 3 Instructions

Household Size is defined as the number of people living in a single housing unit, regardless of their relationship to each other. It does not include individuals who are temporarily staying elsewhere.

- Lastly, you will be prompted to select how you'd like to sign your [Form 8821](#) and Consent [Form 1177](#). You can either eSign, or download the forms to print and sign. The eSignature request will be sent from the email address [taxwallet@halcyon.com](mailto:taxwallet@halcyon.com). Both Spam and Junk folders should be checked if the request is not immediately available in your inbox.

Links are available on the page to download the required forms. You can choose to either upload the signed Forms digitally, or send us paper copies via the mail, at the address below.

**InClime**  
**2631 Housley Road #1036**  
**Annapolis, MD 21403**

If you choose to upload the documents online, additional file upload slots will appear for you to upload the Forms. To complete your application, you'll need to provide both forms.

## Section 4: Supporting Documentation

How do you want to sign your 8821 and Consent Form 1177 **REQUIRED**

Print & Sign

Download IRS Form 8821

Download Consent Form 1177

### Additional Adult's Required Forms

Download IRS Form 8821

Download Consent Form 1177

Do not send completed forms to the IRS; you will be prompted to upload forms in the next step.

## Choose how to manually submit

Online submission: Upload your completed application.

US Mail: Send your completed application to:

InClime  
2631 Housley Road #1036  
Annapolis, MD 21403

## Upload IRS Form 8821 and Consent Form HC-1177

### Applicant Required Forms

Choose File No file chosen

Choose File No file chosen

### Additional Adult (1) Uploads

#### Additional Adult ( )

Choose File No file chosen

#### Additional Adult ( )

Choose File No file chosen

Submit your Application

## Section 4 Instructions

### eSign:

- Select eSign from the menu dropdown and click Continue.
- Click Submit Your Application in the next step.
- You will receive a follow-up email from [taxwallet@halcyonsw.com](mailto:taxwallet@halcyonsw.com) asking for your electronic signature. Follow the prompts in the email to complete the signing process.

### Download, Print, and Sign:

- Select Print & Sign from the menu dropdown.
- Download both the IRS Form 8821 and Consent Form 1177.
- Print and physically sign IRS Form 8821 on the signature line.
- Print and physically sign Consent Form 1177 on the signature line.

### Form 8821 & Form HC-1177:

Only scanned versions of the IRS Form 8821 and Consent Form 1177 are acceptable. Photographed copies will not be accepted.

Only PDF, JPEG, and IMG files may be used for uploads.

Any forms submitted by mail or fax will be processed electronically by InClime, and the paper copies will be destroyed.

Forms must be uploaded directly to the application or submitted directly to InClime. Forms submitted directly to the IRS are invalid and cannot be used to determine income eligibility.

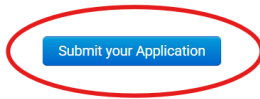
If you need any assistance submitting this form, please contact customer service.

## Contact Us

Tel	(888) 707-6136
Email	<a href="mailto:admin@inclimeverify.com">admin@inclimeverify.com</a>

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- Once you have either uploaded the Forms online or selected to send them via mail, click “Submit your Application” at the bottom of the page.



## Where to Get Help With Your Application

### Contacting the Program Administrator

EAG Pilot Program Administrator Hotline	EAG Pilot Program Administrator Email
<b>1-877-402-0095</b>	<a href="mailto:admin@nyeag.com">admin@nyeag.com</a>

A dedicated customer service team is responsible for managing customer inquiries via email ([admin@nyeag.com](mailto:admin@nyeag.com)) and phone (+1 877-402-0095) during regular business hours (Monday through Friday, 09:00 am – 05:00 pm ET).

We try to respond to all requests in a timely manner to ensure a quick resolution to any potential problems.

### Contacting your Electric or Gas Utility

Utility	Service Type	Customer Service & Billing	Website
<b>Consolidated Edison</b>	Electric Gas	+1 800-752-6633	<a href="#">Consolidated Edison Homepage</a>
<b>Orange &amp; Rockland Utilities</b>	Electric Gas	+1 877-434-4100	<a href="#">Orange &amp; Rockland Utilities Homepage</a>
<b>National Fuel Gas</b>	Gas	<u>Buffalo Area:</u> +1 716-686-6123 <u>Outside Buffalo:</u> +1 800-365-3234	<a href="#">National Fuel Gas Homepage</a>
<b>National Grid (Upstate)</b>	Electric Gas	+1 800-642-4272	<a href="#">National Grid (Upstate) Homepage</a>
<b>National Grid (Long Island)</b>	Gas	+1 800-930-5003	<a href="#">National Grid (Long Island) Homepage</a>

Utility	Service Type	Customer Service & Billing	Website
National Grid (Metro NYC)	Gas	+1 718-643-4050	<a href="#">National Grid Homepage (Metro NYC)</a>
New York State Electric & Gas (NYSEG)	Electric Gas	+1 800-572-1111	<a href="#">NYSEG Homepage</a>
Rochester Gas & Electric (RG&E)	Electric Gas	+1 800-743-2110	<a href="#">Rochester Gas &amp; Electric Homepage</a>
Central Hudson Gas & Electric	Electric Gas	+1 845-452-2700	<a href="#">Central Hudson Gas &amp; Electric Homepage</a>
PSEG Long Island	Electric	+1 800-490-0025	<a href="#">PSEG Long Island Webpage</a>

## Appendices

### Appendix A: Glossary of Pilot Program Terms

In addition to those listed here, see the [PSC Energy Glossary](#) for common energy terms and definitions.

Term	Definition
<b>Air Source Heat Pump</b>	Heat pumps are all-in-one heating and air conditioning systems that are specifically designed to work efficiently in cold climates. Cold-climate air source heat pumps extract heat from the air outside and distribute it inside buildings. This process is reversed during warmer months to provide cooling by drawing heat out of a building’s interior.
<b>Annual Bill Cap</b>	To determine if you will receive a credit on your electricity bill the Pilot Program team compares the total electricity costs on your bills against your reported income. A credit is applied to your bills when electricity costs exceed 6% of household income for the year. This is the Annual Bill Cap.

Term	Definition
<b>Building Electrification</b>	Converting building systems that use fossil fuels (gas, oil, or propane) to high-efficiency electric equipment that is increasingly powered by clean and renewable electricity.
<b>EmPower+ Program</b>	The EmPower+ Program is a New York State incentive program managed by the New York State Energy Research and Development Authority (NYSERDA). The program helps New Yorkers save energy and money for energy improvements in their homes.
<b>Energy Affordability Guarantee (EAG Credit)</b>	Energy Affordability Guarantee Credit (EAG Credit) refers to the total reduction in your bill each month calculated to ensure you don't pay more than 6% of your annual household income toward electricity.
<b>Energy Affordability Program (EAP)</b>	In 2016, the PSC adopted a statewide Energy Affordability Program (EAP), which provides income-eligible consumers with a discount on their monthly electric and/or natural gas bills. The program is administered by New York's major electric and natural gas utilities.
<b>Effective useful life (EUL)</b>	An estimation of how long it may be assumed that an installed measure, like your heat pump or heat pump water heater, will continue to operate and generate energy savings.
<b>Extra Adults (Income Verification/Taxes)</b>	Extra adults refers to adults (such as a parent, relative, or partner) that you claim as a dependent on your taxes.
<b>Dependent (Taxes)</b>	A dependent for tax purposes is a qualifying child or relative who relies on you for financial support. This is someone other than the taxpayer or spouse who qualifies to be claimed by someone else on a tax return.

Term	Definition
<b>Heat Pump Water Heater</b>	Heat pump water heaters are a highly efficient way to heat water, using electricity to pull heat from the surrounding air and transfer it to water enclosed in a tank.
<b>Home Energy Assistance Program (HEAP)</b>	Home Energy Assistance Program, or HEAP, is a federally funded program administered locally by the New York State Office of Temporary and Disability Assistance (OTDA). The program provides financial and technical support to assist New Yorkers in meeting their immediate home energy needs.
<b>Investor-Owned Utility (IOU)</b>	Investor-owned utilities (IOUs) are monopoly electricity and gas service providers regulated by the New York State Department of Public Service. There are six IOUs in New York State, operating collectively as the 'Joint Utilities of New York'.
<b>Joint Filing</b>	Joint Filing, or "Married Filing Jointly" is a tax status for married couples who both agree to file a joint return. This means that you combine your income, deductions, and credits with your spouse's, all on 1 tax return with the same tax rate.
<b>Low-to-Moderate Income (LMI)</b>	Low income is defined as a total household income that is less than 60% of the State median income and that qualifies for HEAP. Moderate income is defined as total household income that is less than 80% of the State or Area Median Income, whichever is higher. This can vary by county.
<b>New York State Department of Public Service (DPS)</b>	A state agency established by law with oversight responsibilities regarding the operation of regulated monopoly utilities. They are the administrators of this program in partnership with your electricity utility.
<b>New York State Energy Research &amp; Development</b>	The New York State Energy Research and Development Authority (NYSERDA) works to promote energy efficiency, renewable energy, and emissions reduction across New York's economy and energy system.

Term	Definition
<b>Authority (NYSERDA)</b>	They administer financial and technical assistance to support these goals, including via the EmPower+ Program.
<b>1040 Form</b>	The 1040 Form is used to file your individual tax return each year. If you used a tax service or online software, it likely generated a 1040 Form for you.

## Appendix B: Customer Consent to Share Utility Data

As part of the application process, you agreed to abide by the following customer consent regarding the transfer of utility data:

I agree and authorize my electric and gas utility's sharing of my monthly billing information for two years prior to my participation in the Energy Affordability Guarantee Pilot (Pilot) including electric and gas consumption and associated cost, and my monthly electric billing information going forward for the duration of my participation in the Pilot, including electricity consumption, associated cost, the amount of monthly Energy Affordability Program credits or other bill credits such as those associated with the Home Energy Assistance Program or a community solar subscription received, and my participation in budget billing or deferred payment agreement programs, or in arrears with New York State Department of Public Service (DPS) Staff and its agents or authorized representatives for the purposes of supporting my participation in the Pilot. I agree and authorize NYSERDA to share the information provided in my EmPower+ application and the details of my EmPower+ project with New York State DPS Staff and its agents or authorized representatives for the purposes of supporting my enrollment into the Pilot. I also agree and authorize the DPS Staff and its agents or authorized representatives to share my participation status in the Pilot with my electric and/or gas utility and NYSERDA, including its agents or authorized representatives.

## Appendix C: Required Documents for Income Verification

As part of your submission, we will reference tax information from the Internal Revenue Service (IRS).

If we are not able to verify your income with the IRS, we will use the Sixty Percent (60%) of Estimated State Median Income / Area Median Income for your area of New York State and your self-reported household income to determine your household income for purposes of calculating the credit.

The Program will require documentation to support your self-certification. Participants may self-certify their income by providing the program administrator with documentation of their total household income from all applicable sources, including:

- Alimony
- Annuities
- Disability (Short Term or Long Term)
- Estates or Trusts
- Gambling or Lottery Winnings (Net)
- Interest Income
- Insurance Proceeds or Dividends
- Pension or Retirement Account
- Rental Income
- Royalties
- Salaries/Wages
- Self-Employment Income
- Social Security
- Social Security Disability
- Tax Documentation
- Unemployment
- Veteran's Benefits
- Worker's Compensation

For a list of potential documentation and how that documentation may be used to calculate your annual household income see the table on Pages 3 - 5 of the [NYSERDA EmPower+ Program Manual online](#).

Do not hesitate to reach out to the Program Administrator team via phone (977-402-0095), email (admin@nyeag.com), or the portal with questions related to the process for income verification. Please be advised that the New York State Department of Public Service will have final decision-making authority regarding the sufficiency of self-reported documentation, including any subsequent determination that additional documentation is required.