

2016-2017 NY Residential Existing Homes Program Contractor Resource Manual Table of Contents

Section 1 – Contacts

- 1.1 NY Residential Existing Homes Program Contact List
- 1.2 Home Performance with ENERGY STAR Account Manager Territory Map
- 1.3 CBO Contact List

Section 2 – Contractor Participation

- 2.1 Benefits of Contractor Participation
- 2.2 How to Become a Participating Contractor
- 2.3 2016-2018 NY Residential Existing Homes Program Participation Agreement
- 2.4 2016-2018 NY Residential Existing Homes Participation Agreement Signature Form
- 2.5 2016-2018 Addendum to Provide Low-Income Energy Efficiency Services (EmPower Addendum & Application)
- 2.6 2016-2018 NY Residential Existing Homes Participation Vendor Agreement

Section 3 – Customer Participation

- 3.1 Overview of Customer Incentives
- 3. 2 Home Performance with ENERGY STAR Free/Reduced-Cost Audit Application
- 3.3 NYSERDA Residential Household Income Screening Application
- 3. 4 -Income Guidelines
- 3.5 Energy Usage History Waiver Form
- 3.6a EmPower New York Program Application General Application
- 3.6b EmPower New York Program Application WAP Coordinated Application
- 3.7 Serving Rental Properties through Assisted Home Performance with ENERGY STAR
- 3. 8 Multi-Family Building Participation
- 3.9 Assisted Home Performance with ENERGY STAR 1-4 Building Owner's Agreement
- 3.10 EmPower NY Homeowner Agreement
- 3. 11 Consumer-Friendly Eligible Measures List for Home Performance with ENERGY STAR

Section 4 – Financing

- 4.1 Consumer Financing Options
- 4.2 Program Financing Fact Sheet
- 4.3 How to Participate in Residential Financing
- 4.4 Residential Loan Information
- 4.5a NYSERDA Residential Credit and Income Screening Application
- 4.5b NYSERDA Residential Household Income Screening Application
- 4.6 Phased Loan Process
 - 4.6a Phased Loan Payment Request Form
 - 4.6b Example Phased Loan Approval Letter

Section 5 - Operational Policies and Procedures

- 5.1 -Electronic Signature Policy
- 5.2 Effective Useful Life of Eligible Measures
- 5.3 Policy for Households Affected by Severe Weather Events
- 5.4 Handling Emergency Situations
- 5.5 Coordination of EmPower New York and Assisted Home Performance with ENERGY STAR Projects



5.5a Customer Referral Guidelines for Coordination of Assisted Home Performance & EmPower

5.5b EmPower NY/Assisted Home Performance FAQs

Section 6 – Home Performance with ENERGY STAR Operational Policies and Procedures

- 6.1 HPwES Operational Procedures Overview
- 6.2 HPwES Operational Procedures Flowchart
- 6.3 HPwES Eligible Measures and Accessories List
- 6.4 Comprehensive Energy Assessment Procedures
- 6.5 HPwES Insulation Policy
- 6.6 HPwES Lighting Policy
- 6.7 HPwES Fuel Conversion Policy
- 6.8 Cost Effectiveness Criteria
- 6.9 NY Optimization
- 6.10 State Historic Preservation Office (SHPO) Review

Section 7 - EmPower New York Operational Policies and Procedures

- 7.1 Procedures for Referring Households into EmPower NY
- 7.2 EmPower NY Project Assignment Process
- 7.3 Evaluation of Potential for Energy Services
- 7.4 EmPower Energy Audit Process
- 7. 5 Determination of Work scopes for 1-4 Unit Homes
- 7.6 Services to Rental Properties
- 7.7 EmPower NY Pricing
- 7.8 EmPower Electric Reduction Measures and Criteria
- 7.9 EmPower Home Performance Measures
- 7.10 EmPower Heating System Conversion Hotlines
- 7.11 EmPower Project Completion and Invoicing
- 7.12 EmPower Quality Control Procedures
- 7.13 EmPower Health and Safety Procedures
- 7.14 Weatherization Agency Participation
- 7.15 In Home Customer Education
- 7.16 EmPower In Home Education Manual

Section 8 - Operational Forms

- 8.1 Home Performance with ENERGY STAR (including Assisted)
 - 8.1a 'So What's Next Brochure'
 - 8.1b Sample Eligibility Summary Report
 - 8.1c Customer Information Form
 - 8.1d Customer Information Form with PSEGLI
 - 8.1e Field Change Order Form
 - 8.1f Certificate of Completion
 - 8.1g Certificate of Completion (NY Optimization)
 - 8.1h State Historic Preservation Office Form
- 8.2 EmPower New York
 - 8.2a EmPower Request for Contractor Forms
 - 8.2b EmPower Initial Interview Form
 - 8.2c EmPower Certificate of Completion
 - 8. 2d EmPower Combustion Appliance Form



- 8.2e EmPower Appliance Exchange Agreement
- 8.2f EmPower Notification of Possible Presence of Asbestos
- 8.2g EmPower Clean & Tune Checklist & Certification
- 8.2h EmPower House Diagram Worksheet
- 8.2i Empower Optional Field Data
- 8.2j EmPower Supplemental Data Collection

Section 9 – Materials & Installation Guideline

9.1 - Materials & Installation Guidelines

Section 10 – Quality Assurance

- 10.1 Quality Assurance Policies and Procedures
- 10.2 Quality Assurance Inspection Checklist
- 10.3 Field Inspection Data Collection Administrative Form (W/Defect Rating for New Scoring)

Section 11 - Databases & Software

- 11.1 Databases used in Home Performance with ENERGY STAR and EmPower New York
 - 11.1a Quality Assurance Contractor Scoring System Database
 - 11.1b NYSERDA Portal User Guide for Participating Contractors
- 11.2 Home Performance with ENERGY STAR
 - 11.2a NY HP Portal
 - 11.2b NY HP Portal User Guide
 - 11.2c List of Approved Software
 - 11.2d Modeling Software Comparison Guide
- 11.3 -EmPower New York
 - 11.3a Comprehensive Residential Information System (CRIS)
 - 11.3b CRIS User Guide
 - 11.3c EmPCalc
 - 11.3d EmPCalc Guide
 - 11.3e NY HP Portal User Guide EmPower-Contractors
 - 11.3f NY HP Portal User Guide EmPower Vendors

Section 12 - Outreach & Marketing

- 12.1 Marketing Resources and Policies
- 12.2 List of Available Marketing Documents
- 12.3 NYSERDA Logo Attribution Guidelines

Section 13 - Technical Tips & Resources

- 13.1 Link to BPI Standards
- 13.2 Template: Sample Contract
- 13.3 Alternative to Duct Pressurization Testing
- 13.4 Tips and Solutions to Solve Water Heater Venting Issues
- 13.5 Disposal of Mercury Containing Thermostats
- 13.6 Guidance on Oil Spills
- 13.7 Template: Combustion Efficiency Labels
- 13.8 Energy Saving Chart on Water Waste from Dripping Faucets
- 13.9 Thermostat Savings Worksheet
- 13.10 Gas Leak Safety Procedures
- 13.11 Internal Quality Management: Contractor Best Practices

