



NYSERDA

Introduction & Overview

- EmPower NY
- Assisted Home Performance with ENERGY STAR®

February 22, 2022

Participating Contractors



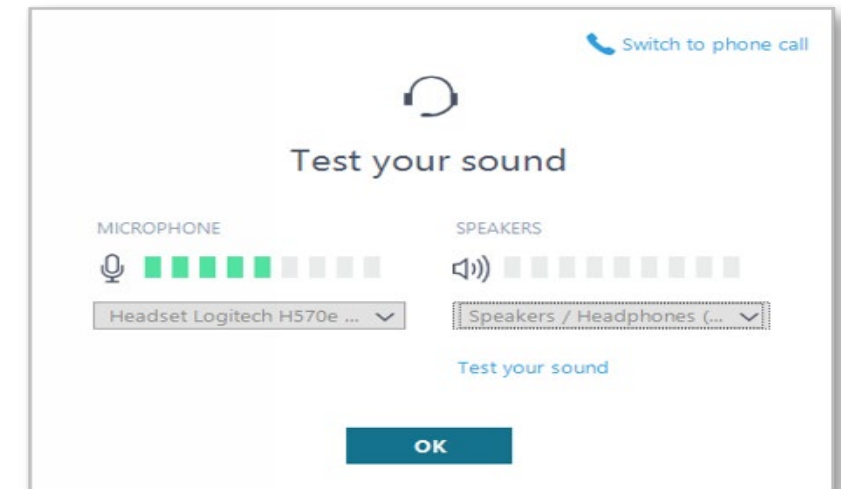
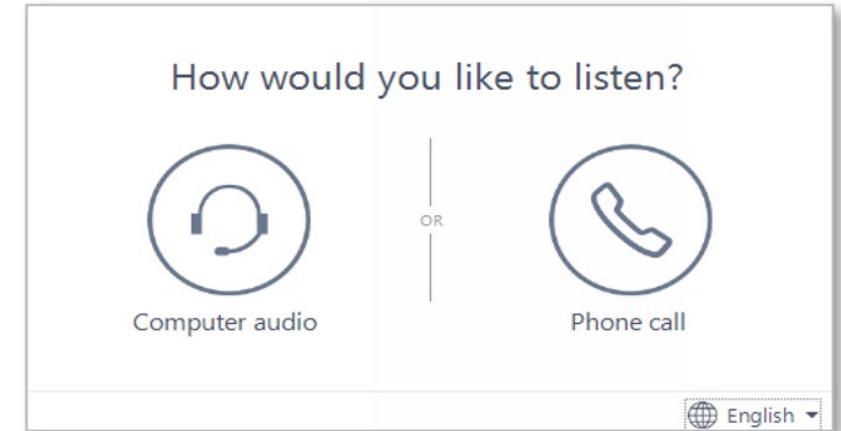
Audio Connection

To connect to audio:

1. Click the Computer audio icon to use this setting.

To test your microphone, select the desired device from the drop down and look for the green bars. To test your sound, select the desired speaker, click “Test your sound”. Click Ok.

2. If you prefer to use a telephone, click the Phone call icon and dial in via the telephone number provided.

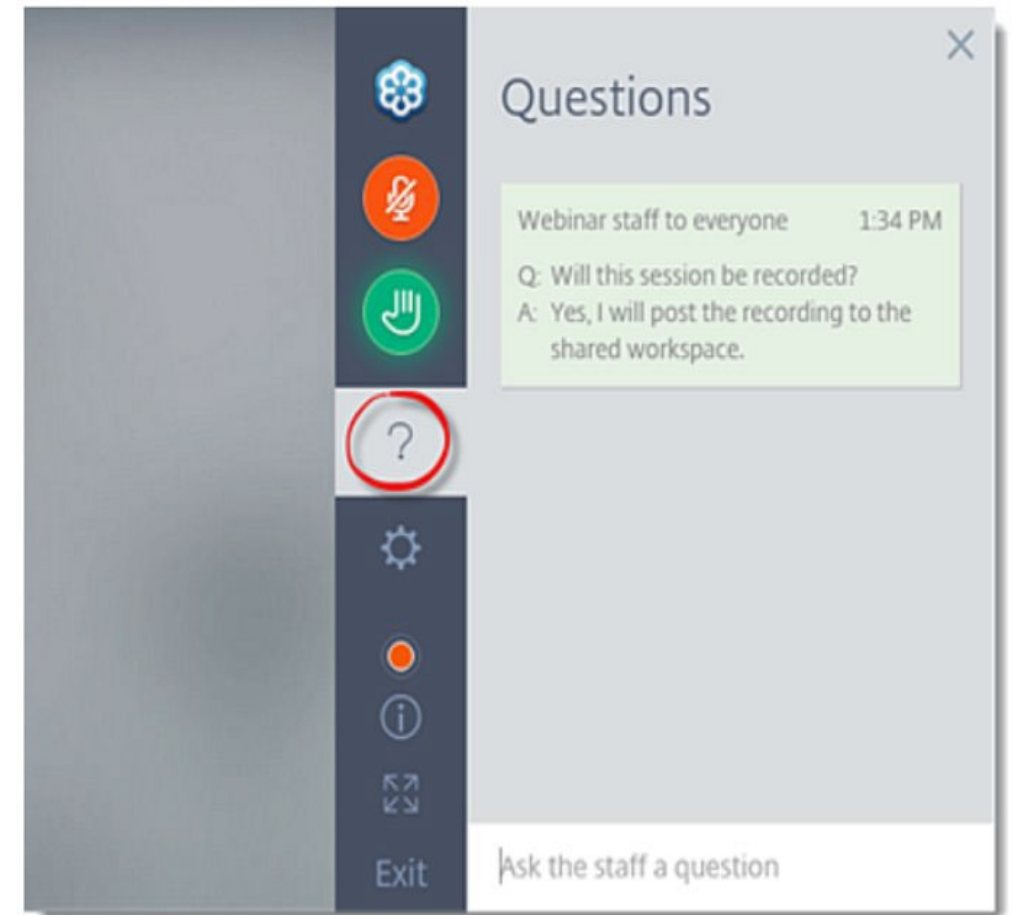


Questions

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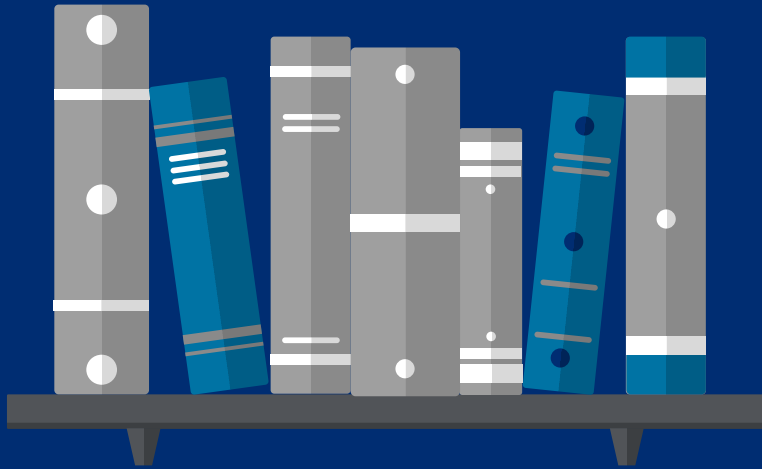


Objective

Review the upcoming Program changes in relation to the series of trainings developed.

Understand the resources available to navigate the changes.

Introduction & Overview



AGENDA

Introduction

Training Schedule & Start Date

Participating Contractor Resources

Program Participation

Q&A

Introduction

Background

The 2019 Climate Leadership and Community Protection Act (CLCPA) calls for a major reduction in the use of fossil fuels for vehicles, buildings, and power plants.

To meet the objectives of this law, NYSERDA is moving away from incentivizing fossil fuel equipment, with a final goal of ceasing all single-family LMI fossil fuel incentives no later than 2025.

A move away from propane, kerosene, and oil HVAC equipment is the first phase of the transition. Additional changes will be made in the coming years to reach our 2025 goal.

Launch of Program Updates:
March 28, 2022

Training Schedule & Start Date



Training Schedule

1	Introduction & Overview FEB-22 3:00 PM – 4:30 PM
2	Combined Residential Application Process FEB-24 3:00 PM – 4:00 PM
3	Audit & Direct Install MAR-01 3:00 PM – 4:30 PM
4	Eligible Measures List & EmPCalc MAR-08 3:00 PM – 4:30 PM
5	Workscope Submission MAR-10 3:00 PM – 4:30 PM
6	Final Project Submission & Payout MAR-15 3:00 PM – 4:30 PM

Q&A Sessions and Office Hours will be held to support the associated trainings:

Q & A Sessions

MAR-04 8:30 AM – 9:30AM | Follow up to Trainings 1-3
MAR-17 3:00 PM – 4:00PM | Follow up to Trainings 4-6
MAR-24 3:00 PM – 4:00PM | Follow up to Trainings 1-6

Office Hours Sessions

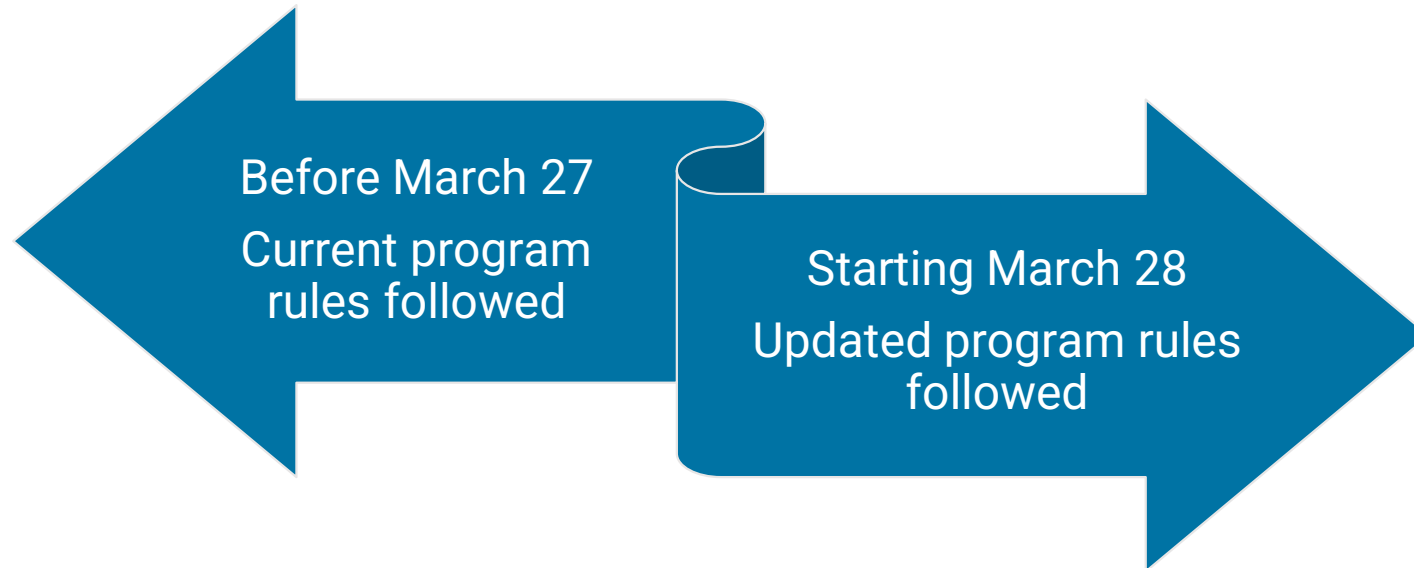
Session 1: APR-01 8:30 AM – 9:30AM
Session 2: APR-15 3:00 PM – 4:00PM
Session 3: APR-22 9:00 AM – 10:00AM

Start Date: Updated Program Changes

Combined Residential Application submission date determines how program rules are applied.

Online (Submission)

Paper (Postmark)



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Combined Residential Application Process

FEB-24 | 3:00 PM – 4:00 PM

Course Overview:

This course reviews the Combined Residential Application process launched in July 2021 including guidance in respect to the NYSERDA Salesforce Portal, Referrals, and Documentation.

New information regarding changes to Combined Projects and Express Audits will also be included:

- **End of combined projects**

When Program changes go into effect, Program participants will no longer be moved from EmPower NY to Assisted Home Performance with ENERGY STAR®. If a customer qualifies for Tier 1-EmPower NY, they must be served through the EmPower program only. Waivers (opt-out forms) will no longer be accepted, and customers will not be allowed to participate in both levels of incentives.

- **End of Express Audits**

When Program changes go into effect, the program will no longer accept audit only applications initiated in the NY HP Portal (Uplight). A customer must use the Combined Residential Application to qualify for both incentives and an audit. The Residential Energy Audit will still be available for market rate customers.

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Audit & Direct Install

MAR-01 | 3:00 PM – 4:30 PM

Course Overview:

This course reviews program requirements for Home Energy Assessments and Direct Install of approved measures and includes the NY HP Portal (Uplight) steps for both the EmPower NY and Assisted Home Performance with ENERGY STAR® workflows.

Additional information regarding changes to Direct Install and Express Audits will be included:

- **Audit Fees**

A base fee of \$250 statewide for both Tier 1-EmPower and Tier 3-Assisted Home Performance with ENERGY STAR® participants. All other audit types (i.e., Electric Reduction) will be discontinued. Additional incentives for completion of blower door and energy education.

- **Direct Install**

Direct Install will be required on all audits.

- **End of Express Audits**

When Program changes go into effect, the program will no longer accept audit only applications initiated in the NY HP Portal (Uplight). A customer must use the Combined Residential Application to qualify for both incentives and an audit. The Residential Energy Audit will still be available for market rate customers.

Eligible Measures List & EmPCalc

MAR-08 | 3:00 PM – 4:30 PM

Course Overview:

This session reviews the new Eligible Measures List and provides a walk-through of the newly redesigned EmPCalc. New information regarding Program changes will also be included:

- **Fossil fuel heating equipment**
Ending incentives for all propane, kerosene, and oil HVAC equipment.
- **Natural gas furnaces**
Must include electric savings from ECM motors in workscope, be 96% efficient, and replace a furnace that is 80% efficient or less.
- **Fossil fuel water heating equipment**
Only heat pump water heater (HPWH), electric resistance and power vented domestic hot water equipment will be incentivized.
- **Caps on fossil fuel equipment incentives**
Incentive caps: Tier 1-EmPower NY - \$4,000 | Tier 3-Assisted Home Performance with ENERGY STAR® - \$2,000.
- **Electric to Natural Gas Dryer Conversions**
No longer eligible for incentives.
- **Air source heat pumps and heat pump water heaters**
Will be prequalified for Tier 1-EmPower NY and Tier 3-Assisted Home Performance with ENERGY STAR® when replacing propane, oil, kerosene, electric resistance, or wood. Requires positive dollar savings or signed waiver from customer.
- **Spray foam**
No longer a prequalified measure. Will require project level cost effectiveness.
- **Project level cost effectiveness**
EmPower NY and Assisted Home Performance with ENERGY STAR® will begin using project level cost effectiveness (total program incentives evaluated against the total savings of all measures).
- **Health & safety (H&S) caps for prequalified projects**
Projects w/ H&S amounts (Tier 1-EmPower NY: \$1,000 | Tier 3-Assisted Home Performance with ENERGY STAR®: \$500) are approved without meeting project level cost effectiveness.

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Workscope Submission

MAR-10 | 3:00 PM – 4:30 PM

Course Overview:

Review the submission of projects for review and approval in both the EmPower NY and Assisted Home Performance with ENERGY STAR® workflows in the NY HP Portal (Uplight).

Building on the previous training courses, we will walk through how to submit projects following the updated Program guidelines including:

- projects containing only prequalified measures
- projects with a mix of prequalified and standard measures
- projects with measures that exceed Program defined caps
- projects that fail Project Level Cost Effectiveness
- field change orders
- exception requests

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Final Project Submission & Payout

MAR-15 | 3:00 PM – 4:30 PM

Course Overview:

The Final Project Submission & Payout Training Session will cover the submission of projects for final review and approval of payout in both the EmPower NY and Assisted Home Performance with ENERGY STAR® workflows in the NY HP Portal (Uplight).

This session will include a review of all documents and forms required for use in the Program including those that have been revised for use with the Program changes.

Participating Contractor Resources

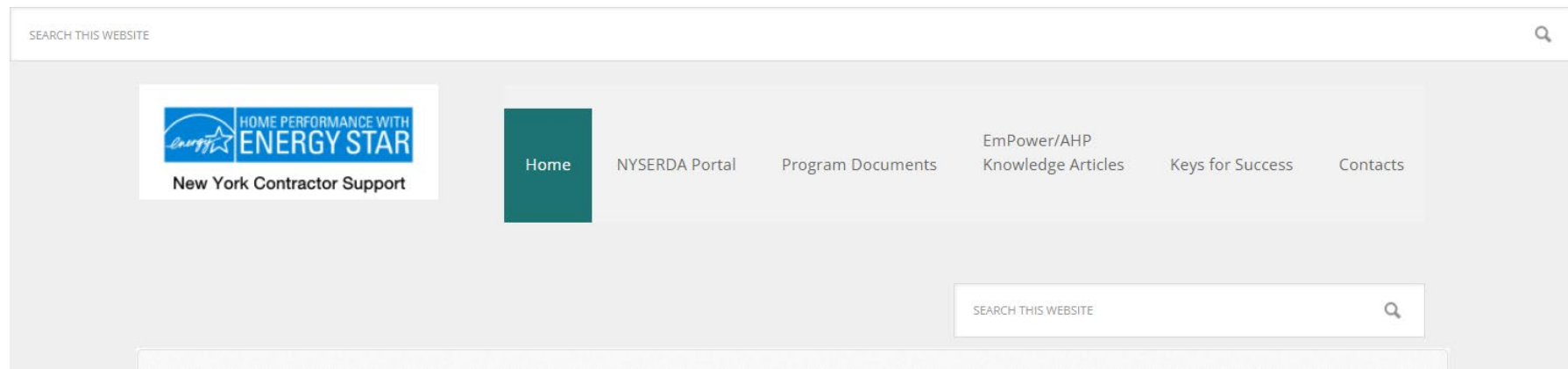


Contractor Support Website

<https://hpwescontractorsupport.com>

Repository for program rules and requirements, documentation (*i.e.*, manuals, guides, forms), tools, webinar recordings and links to other contractor resources.

- Contractor Resource Manual (CRM)
- Program Announcements
- Contractor Webinars/Trainings
- Program Tools (*i.e.*, EmPCalc)
- User Guides
- New Contractor Guide
- Upcoming Events Calendar
- Helpful Links
- Program Contacts



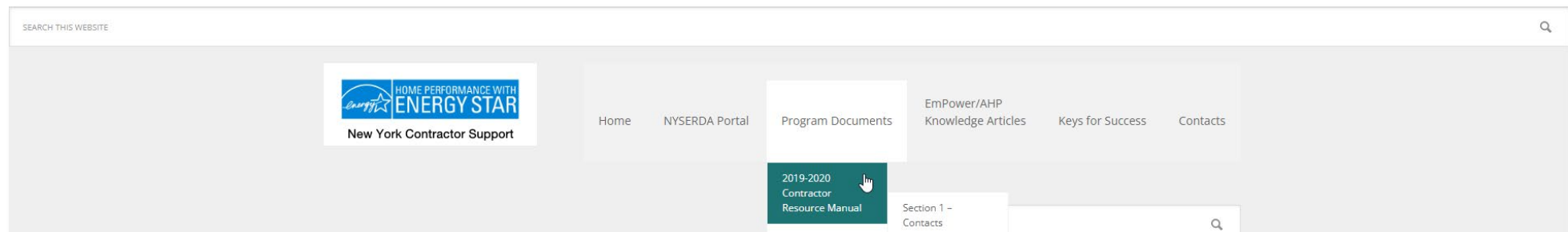
Contractor Resource Manual

<https://hpwescontractorsupport.com/program-documents-2/2019-2020-contractor-resource-manual/>

The Contractor Resource Manual (CRM) was developed for contractors participating in the NY Residential Existing Homes Programs, including EmPower NY and Assisted Home Performance with ENERGY STAR® (AHPwES). The manual contains vital information regarding program rules, processes, forms and resources. The purpose of the CRM is to help contractors understand and navigate the programs:

Table of Contents:

- Section 1: Program Contacts
- Section 2: Contractor Participation
- Section 3: Customer Participation
- Section 4: Financing
- Section 5: Operational Policies and Procedures
- Section 8: Operational Forms
- Section 10: Quality Assurance
- Section 11: Databases and Software
- Section 12: Outreach and Marketing
- Section 13: Technical Tips and Resources
- Addendums



NYSERDA Residential Program Updates

<https://hpwescontractorsupport.com/program-documents-2/program-announcements/>

Updates for NYSERDA's residential programs are sent weekly, typically Thursday afternoons. We encourage all participating contractors and their staff to sign up for these updates so they can stay up to date on the latest information.

Recent Program Updates are located on the home page of the Contractor Support website under Program Announcements.

Both recent and archived Program Updates can also be accessed using the menu at the top of the page: *Program Documents* > *Program Announcements*

 [Subscribe for Program Updates](#) 

2019-2020 CONTRACTOR RESOURCE MANUAL



PROGRAM ANNOUNCEMENTS

2/3/2022 Residential Program Updates
2/3/2022

1/27/2022 Residential Program Updates
1/27/2022

1/20/2022 Residential Program Updates
1/20/2022

1/13/2022 Residential Program Updates
1/13/2022

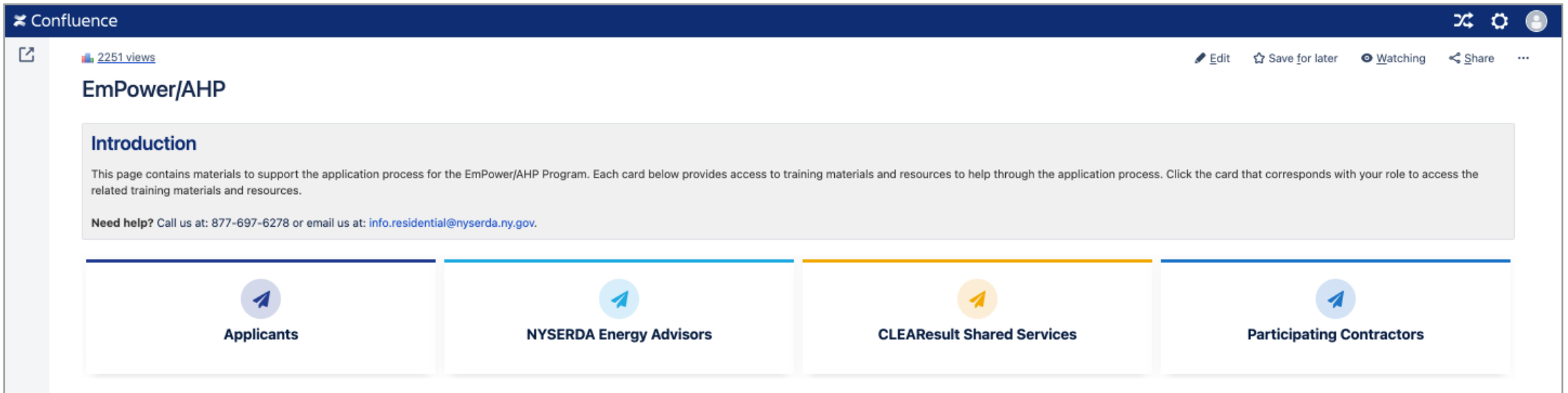
 [Sign up for Program Notices click here!](#)

NYSERDA's Public Knowledge Base (Confluence)

<https://knowledge.nyserda.ny.gov/pages/viewpage.action?pageId=81855382>

This platform is intended to provide additional guidance and training resources for NYSERDA's external partner communities when supporting a NYSERDA program. These program guides focus heavily on the applications NYSERDA utilizes to help manage our programs and provide additional clarity on what your specific roles and responsibilities are.

The Single-Family Residential section contains materials to support the Combined Residential Application process for the EmPower NY/Assisted Home Performance with ENERGY STAR® Program. Training materials and resources are provided to help users based on their role.



The screenshot shows a Confluence page titled "EmPower/AHP" with 2251 views. The page includes an "Introduction" section with a paragraph explaining the purpose of the page and a "Need help?" section with contact information. Below the text are four role-based navigation cards: "Applicants", "NYSERDA Energy Advisors", "CLEAResult Shared Services", and "Participating Contractors". Each card features a blue circular icon with a white arrow pointing up and to the right.

Confluence

2251 views

EmPower/AHP

Introduction

This page contains materials to support the application process for the EmPower/AHP Program. Each card below provides access to training materials and resources to help through the application process. Click the card that corresponds with your role to access the related training materials and resources.

Need help? Call us at: 877-697-6278 or email us at: info.residential@nyserda.ny.gov.

Applicants

NYSERDA Energy Advisors

CLEAResult Shared Services

Participating Contractors

Resource Recap: Who to Contact, Accessing Resources & Getting Help

Who Can I Call?!

Contractor Support

1-800-284-9069

support.residential@nyserda.ny.gov

Contractor Support

- General program questions
- Payment inquiries
- Emergency approvals
- Portal/Database questions
- Paperwork inquiries
- EmPCalc support
- Advanced modeling questions

Account Manager

- Technical support
- Workscope development
- QA/QC questions
- Remediation assistance
- Training needs
- Emergency approvals

24/7 Resources

- [Contractor Support website](#)
- [Contractor Resource Manual](#)
- [Program Announcements](#)
- [EmPower/AHP Knowledge Base](#)
- [NYSERDA website](#)
- [NYSERDA Residential Financing](#)

Program Participation



Updating Company Information

What Does Program Need to Know?

It's important that company information and points of contact are promptly updated with the Program when changes occur. Delays can impact important communication and project payments.

Update	Notification	Submission Method
Authorized Company Contact New Company Name & Tax ID	New Participation Agreement Signature Form will need to be completed and signed and submitted.	Email NYSERDA: hpwes@nyserda.ny.gov Mail: New York State Energy Research and Development Agency Attn: NY Residential Existing Homes Program 17 Columbia Circle Albany, NY 12203
Company Address Service Territory Primary Contacts for EmPower/AHPwES	Email with request by the Authorized Company contact.	Email Contractor Support: support.residential@nyserda.ny.gov Contractor Support Line: 800-284-9069
NYSERDA EFT Direct Deposit	EFT Bank Information and Authorization Form	https://nyserda.seamlessdocs.com/f/EFTForm
Insurance Information	Insurance document MUST include phrase "NYSERDA & The State of New York are listed as additional insured"	Email to NYSERDA: To: insurance@nyserda.ny.gov Cc: hpwes@nyserda.ny.gov

Program Software: Accessing Needs and Updating Users

NY HP Portal (Uplight) (Project Management)

Individual logins required for each user, no shared logins

Users can be added or removed by sending [email](#) or calling Contractor support (800-284-9069)

- Requests need to come from or contain approval from the Authorized Company Contact.
- Provide user's first/last name and email address

NYSERDA Salesforce Portal (Combined Residential Application, Contractor Support)

Individual logins required for each user, no shared logins

Each company has at least one *Admin* that can add or remove users. Contact [Contractor Support](#) if you do not know your *Admin*.

- Admin guidance is located on the [EmPower/AHP Knowledge Base](#) in the *Managing Portal Access* section.

Program Announcements ([Subscribe for Program Updates](#))

Announcements can be started or stopped by sending [email](#) or calling Contractor support (800-284-9069)

- Provide user's first/last name and email address
- Check Junk/Spam folders for initial notifications
- Whitelist hpwes@nyserda.ny.gov and hpwes+nyserda.ny.gov@ccsend.com

NYSERDA Residential Financing

Projects with NYSERDA Residential Financing

In July 2021, financing was decoupled from the NY HP Portal (Uplight) workflow. Projects requiring financing need to utilize the ProForma worksheet that applies to their project type.

- ProFormas can be found on the Resources for Participating Contractors page of NYSERDA's website: <https://www.nyserda.ny.gov/All-Programs/Become-a-Contractor/Become-a-Loan-offering-Contractor/Resources-for-Participating-Contractors>
- Contractors should follow the instructions provided on the site and send ProFormas directly to Slipstream (formerly EFS) for Finance Only approval: Workscope@EnergyFinanceSolutions.com
- A Certificate of Completion and signed contract need to be sent to Slipstream to close-out the Loan.
- Since the NY HP Portal does not communicate with Slipstream, contractors must send a revised ProForma to Slipstream if there are any changes to a project's cost.

Next Steps/Action Items for Contractors

Prepare for Program Updates to Launch

- Review the [latest Residential Program Announcement](#) newsletter
- Review the Training Session Overview & timeline of events
- Have relevant staff register for the upcoming training webinars
- Visit the EmPower/AHP Knowledge Base (Confluence) and review the Combined Residential Application Process.
- Contact your Account Manager with any questions or submit to Contractor Support at support.residential@nyserda.ny.gov

Stay Up to Date with Program

- Subscribe to receive Program Announcements and Updates
- Visit the Contractor Support Website to review the latest versions of the Contractor Resource Manual, download forms and EmPCalc
- Review your NY HP Portal Users, submit your request to add or remove as needed
- Review your NYSERDA Salesforce Portal Users, add or remove as needed
- Review and update your company, insurance and payment information as needed

Q & A

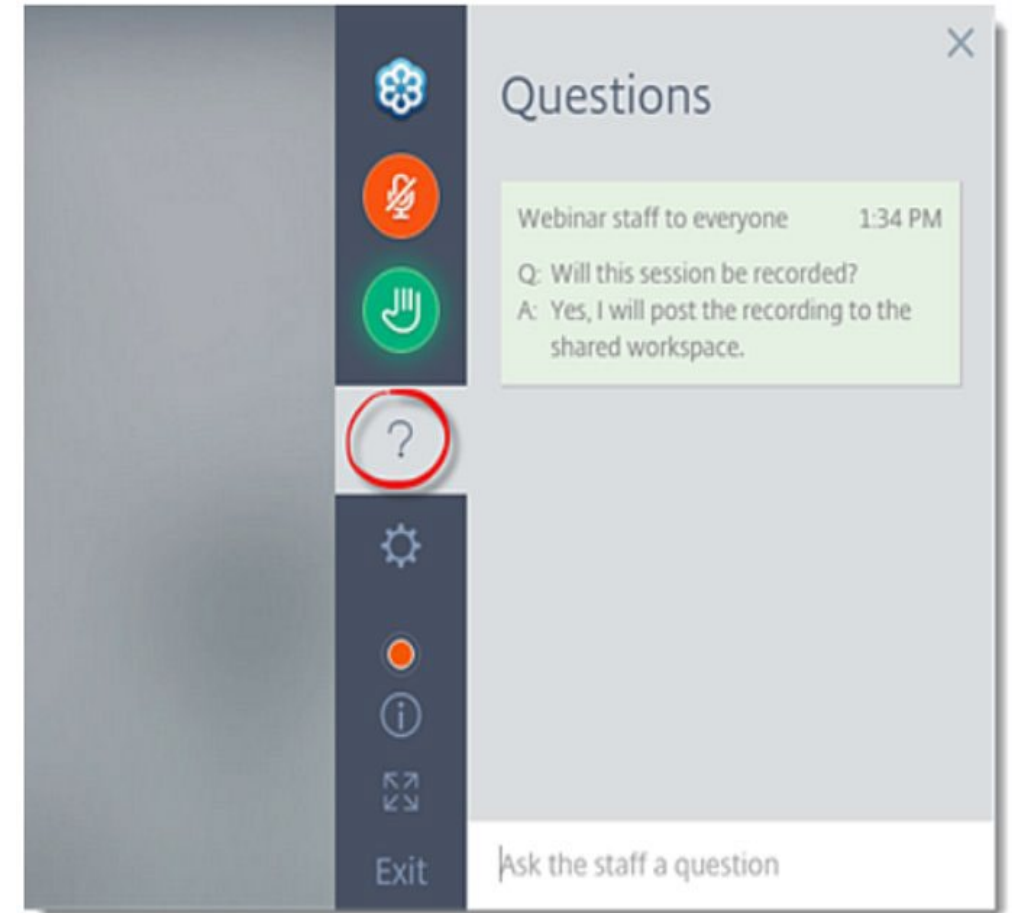


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