

# Assisted Home Performance/ EmPower NY Monthly Program Update

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***EmPower New York & Assisted Home  
Performance with ENERGY STAR®***

February 4, 2022

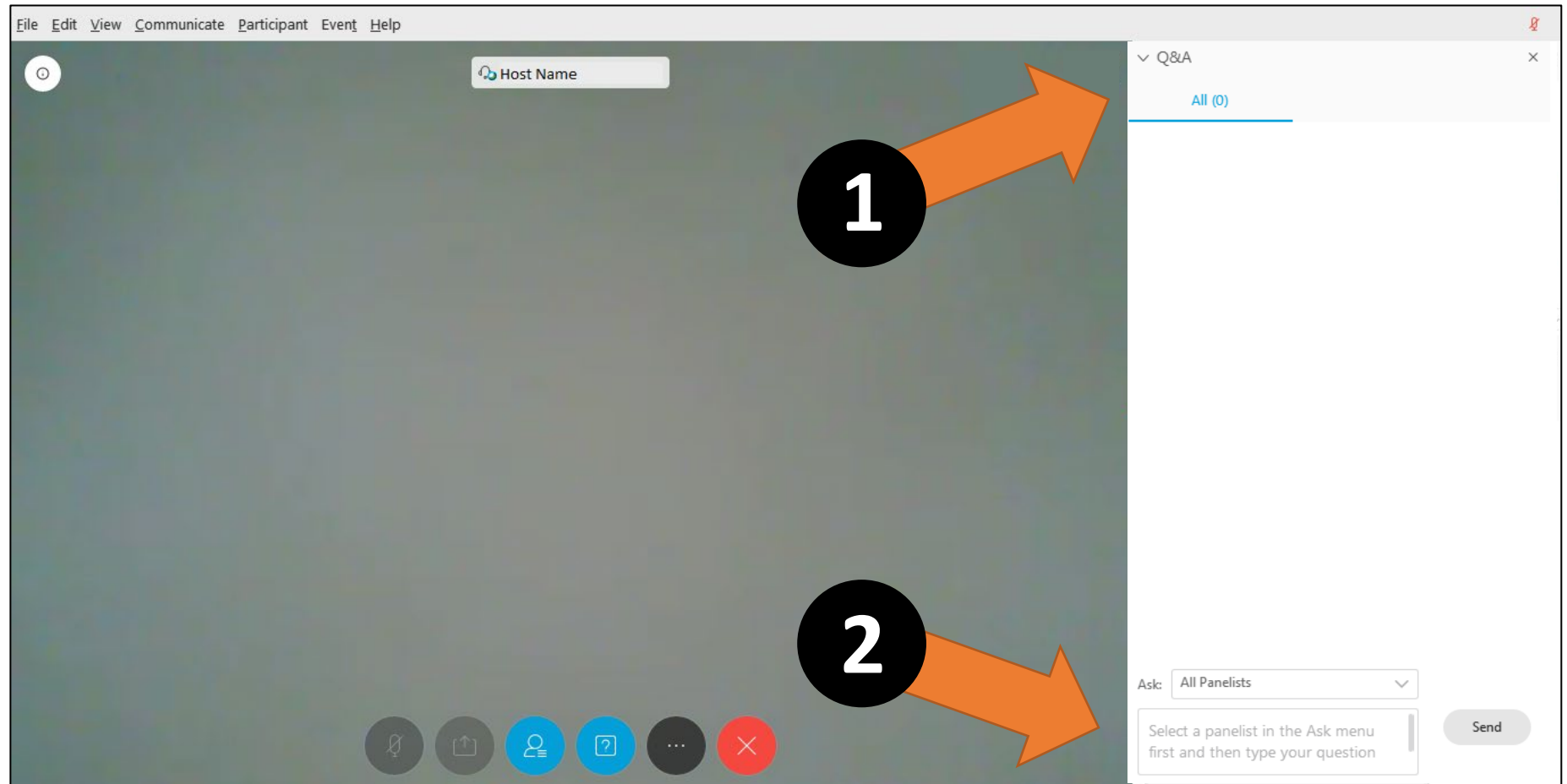


**NYSERDA**

# Options for Q&A During Today's Webinar - Text

## OPTION 1 - TEXT

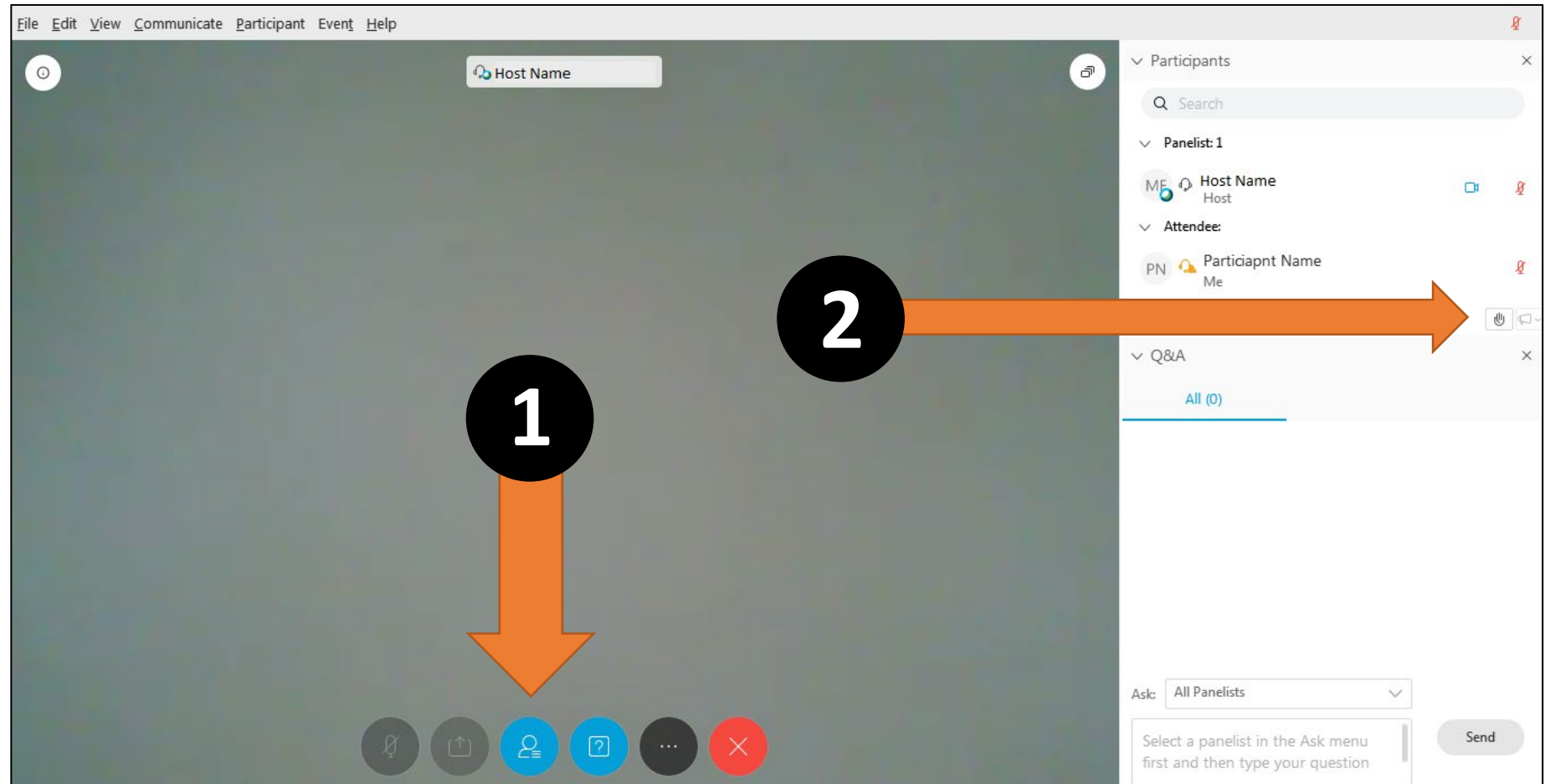
- > Locate the Q&A function in the upper right portion of your webinar panel.
- > Click on the small arrow to the left of "Q&A" to expand the text field.
- > Type your question into the text field and click "send."



# Options for Q&A During Today's Webinar - Mic/Phone

## OPTION 2 - MIC/PHONE

- > Open your participant panel using the circular icon near the bottom of your screen.
- > Locate the “raise hand” icon just below and to the right of your name in the participant panel.
- > Click on the raise hand icon to let us know you have a question.
- > When the Tech Assistant indicates you are unmuted, you can ask your question verbally through your computer mic or phone.
- > When you are finished talking, please click on the hand icon again to indicate you are no longer raising your hand.



# Agenda

- OTDA Heat Pump Funding
- Using a tax return for determining income
- March 28 Program Change Trainings
- SQA Portal Update

# OTDA ARPA Funding

- NYSERDA has received \$26 million in ARPA funding to serve HEAP recipients with envelope and heat pump measures.
- Work must be completed by September 30, 2022 (NYSERDA is working on getting an extension)
- Up to \$20,000 in funding available per household
- Customers must have a valid HEAP award letter from the current program year (after October 1, 2021) that has a CIN number.
- NYSERDA will also send out HEAP referrals to contractors in the next month.
- Open to all current program year HEAP recipients including on Long Island and in Muni territories.

# Finding the CIN number

XL0218 (09/07) NOTICE NUMBER : U50BS09524 Page: 1 \*\*\*\*\*

TOMPKINS COUNTY  
OFFICE FOR THE AGING  
214 W MLK JR / STATE STREET  
ITHACA, NY 14850

## NOTICE OF DECISION ON YOUR HEAP BENEFITS.

SI USTED DESEA RECIBIR NOTIFICACIONES EN  
ESPAÑOL, POR FAVOR PONGASE EN  
CONTACTO CON SU TRABAJADOR(A)

NOTICE NUMBER: U50BS09524		DATE: May 26, 2021		CASE NUMBER: HP14710	
OFFICE OFA	UNIT WALLE	WORKER MORLE	UNIT OR WORKER NAME HEATING/ENERGY ASSISTANCE		TELEPHONE NO. 607-274-5264
AGENCY TELEPHONE NUMBERS			CASE NAME / AND ADDRESS		
GENERAL TELEPHONE NO. FOR QUESTIONS OR HELP 607-274-5482			OFA/WALLE/MORLE [REDACTED]		
OR Agency Conference 607-274-5482					
Fair Hearing information and assistance 800-342-3334					
Record Access 607-274-5482					
Child/Teen Health Plan 607-274-5359					
IF YOU DO NOT AGREE WITH ANY DECISION EXPLAINED IN THIS NOTICE, YOU HAVE A RIGHT TO ASK US FOR A CONFERENCE AND/OR ASK THE STATE FOR A FAIR HEARING. READ THE CONFERENCE AND/OR FAIR HEARING SECTION TO SEE HOW TO ASK FOR A CONFERENCE AND/OR A FAIR HEARING.					
If you are blind or seriously visually impaired and need notices or other written materials in an alternative format (large print, audio, or data CD, or Braille), contact your local social services district.					
<b>HEAP BENEFITS</b>					
Your household has been <b>APPROVED</b> for the following Home Energy Assistance Program (HEAP) benefit(s) for the 2020-2021 program year.					
\$675.00 has been authorized for a HEAP emergency benefit for non-utility fuel. This benefit will be sent to E & V ENERGY.					
Your account number is [REDACTED].					
<b>Your Case information Online</b>					
If you would like to view HEAP case details, you may go to <a href="http://www.mybenefits.ny.gov/">www.mybenefits.ny.gov/</a> to login and create a secure online account. To create your account, you will need your ID number, which is <b>EN47053E</b> ; your case number, which is at the top of this notice; your county of residence; and your date of birth.					
You may also be eligible for food assistance. Check your eligibility and apply					

Award letter must be dated October 1, 2021 or later.

(HEAP) benefit(s) for the 2020-2021 program year.

\$675.00 has been authorized for a HEAP emergency benefit for non-utility fuel.  
This benefit will be sent to E & V ENERGY.

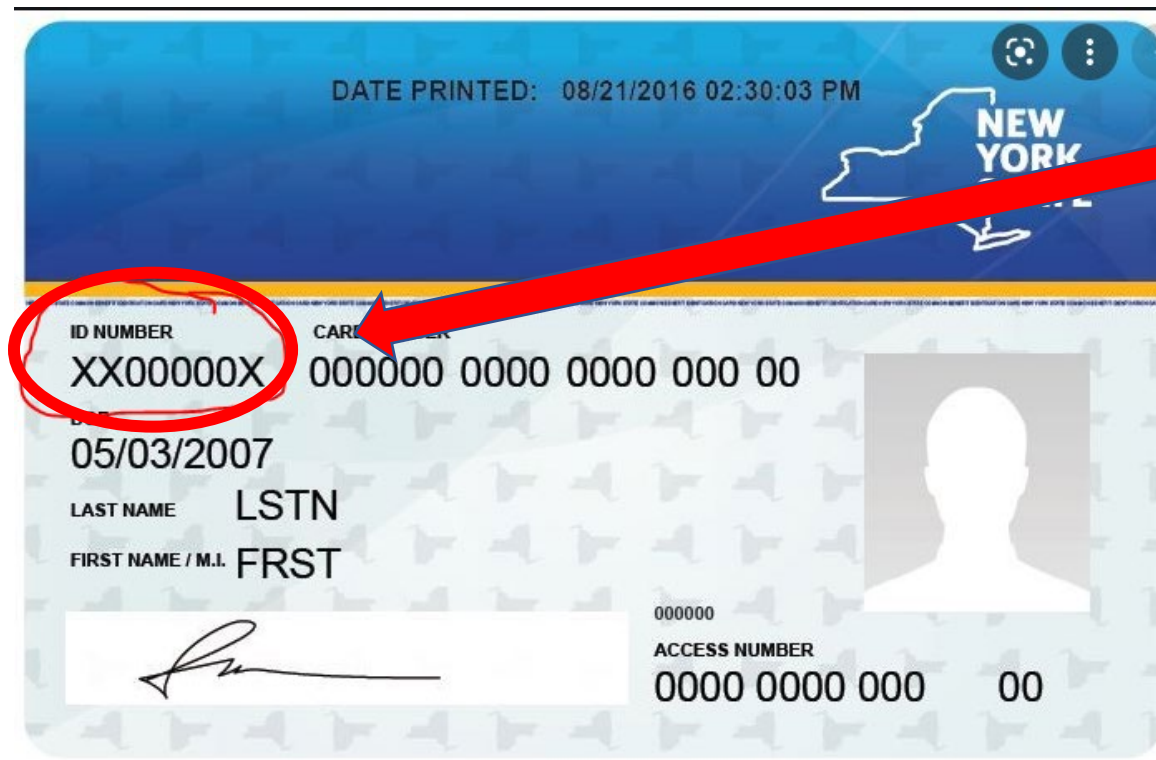
Your account number is [REDACTED].

### Your Case information Online

If you would like to view HEAP case details, you may go to [www.mybenefits.ny.gov/](http://www.mybenefits.ny.gov/)  
to login and create a secure online account. To create your account, you will  
need your ID number, which is **EN47053E**; your case number, which is at the top of  
this notice; your county of residence; and your date of birth.

The CIN number of ID number is usually located in the Case  
information area

# Finding the CIN number (part 2)



If the award letter does not have a CIN number please submit a copy Award letter dated October 1, 2021 or later and a copy of the customer's benefit card. The benefit card had the CIN number labeled ID number.

# Incentives

Description	Incentive Type	EmPower
Upstate ASHP	\$/10,000 btu	\$3000
Downstate ASHP	\$/10,000 btu	\$2,200
Upstate GSHP	\$/10,000 btu	\$3,800
Downstate GSHP	\$/10,000 btu	\$3,800
Upstate HPWH	\$/unit	\$3,000
Downstate HPWH	\$/unit	\$3,000
Ancillary Services	\$/unit	Up to \$2,000



# What measures eligible?

- All HEAP customers with an award letter from the current program year (October 1,2021) with a valid CIN are eligible to receive ARPA funding.
- All customers can receive envelope, health and safety and HPWH measures.
- Customers on oil, propane, kerosene, wood, and electric heat can receive heat pumps without meeting project level SIR.
- Customers with natural gas heat must have a unit with 80% efficiency or less and have project level savings to qualify for a heat pump.
- All homes receiving heat pumps must meet minimum insulation levels.
- Per new program rules starting March 28- customers can receive up to \$4,000 for the replacement of a gas HVAC system

# Insulation Level Requirements

Minimum Levels of Insulation in household (must be verified with an energy audit)

Area	Required Insulation level
walls	R-14
attic	R-30 average
Attic hatches	R-20
Pull down stairs	R-13
Rim Joists	R-14
Mobile Home walls	R-6
Mobile Home attic	R-24
Mobile Home Belly	R-21
Air tightness	7 ACH

# Heat Pump Requirements

These guidelines align with utility specifications.

1. Must cover 90% to 120% of building load.
2. ASHP- NEEP Cold Climate
3. GSHP- Each heat pump in the system must be ENERGY STAR certified and meet or exceed ENERGY STAR Tier 3 Geothermal Heat Pump Key Product Criteria.<sup>7</sup>
4. HPWH-  $\leq 55$  gallon-  $UEF > 2.0$ ,  $> 55$  gallon  $UEF \geq 2.2$  UEF

# Documentation Requirements for Heat Pumps

1. Customer Attestation
2. Contractor Attestation
3. Picture of Panel Box
4. Invoice for the heat pumps
5. Invoice for the Panel Box
6. NEC calculator and picture of the panel box if replacing panel box

# March 28, 2022 Program changes

# Contractor Trainings for Program Changes beginning March 28<sup>th</sup>

1 Introduction & Overview  
FEB-22 | 3:00 PM – 4:30 PM

2 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

We will also be hosting Q&A and Office Hours sessions to support the associated training courses:

## 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](#)

# Using a tax return for income qualification

In order to reflect the total income reflected from w-2s, Social Security statements, and other income sources the program team has devised this guidance for determining income.

# Using a tax return to determine income

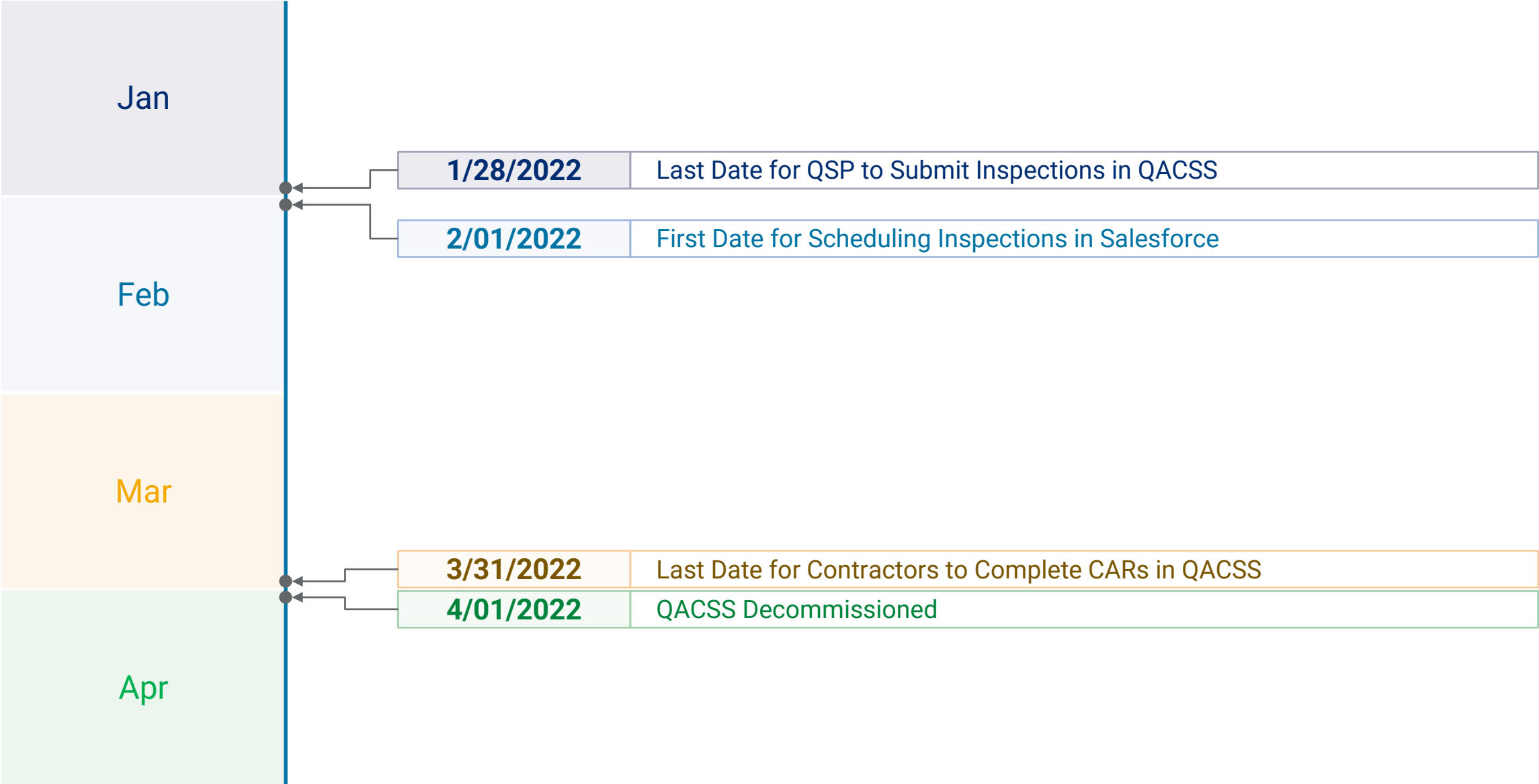
Attach Sch. B if required.	1	Wages, salaries, tips, etc. Attach Form(s) W-2		1	
	2a	Tax-exempt interest	2a	b Taxable interest	2b
	3a	Qualified dividends	3a	b Ordinary dividends	3b
	4a	IRA distributions	4a	b Taxable amount	4b
	5a	Pensions and annuities	5a	b Taxable amount	5b
	6a	Social security benefits	6a	b Taxable amount	6b
<b>Standard Deduction for—</b> <ul style="list-style-type: none"><li>• Single or Married filing separately, \$12,550</li><li>• Married filing jointly or Qualifying widow(er), \$25,100</li><li>• Head of household, \$18,800</li><li>• If you checked any box under Standard Deduction, see instructions.</li></ul>	7	Capital gain or (loss). Attach Schedule D if required. If not required, check here	<input type="checkbox"/>	7	
	8	Other income from Schedule 1, line 10		8	
	9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b>		9	
	10	Adjustments to income from Schedule 1, line 26		10	
	11	Subtract line 10 from line 9. This is your <b>adjusted gross income</b>		11	
	12a	<b>Standard deduction or itemized deductions</b> (from Schedule A)	12a		
	b	Charitable contributions if you take the standard deduction (see instructions)	12b		
	c	Add lines 12a and 12b		12c	
	13	Qualified business income deduction from Form 8995 or Form 8995-A		13	
	14	Add lines 12c and 13		14	
15	<b>Taxable income.</b> Subtract line 14 from line 11. If zero or less, enter -0-		15		

When using a tax return to determine income add boxes 1, 2a, 3a, 4a, 5a, 6a, 7, and 8 together to get the total income for the household. This is the same amount that one would get if the customer submitted individual income sources.



# SQA Portal

# Standards And Quality Assurance



# The NYSERDA Partner Portal

Access the NYSERDA Partner Portal:

<https://portal.nyserda.ny.gov/login>

## Welcome to the NYSERDA Partner Portal

### Login Instructions:

Your **Username** is typically your email + ".nyserda" on the end.

Example: If your email is abc@gmail.com, your username will be abc@gmail.com.nyserda

You can also find your username in the welcome email sent to you from NYSERDA.

### Residential Customers

If you are a residential user trying to enter in an application, then please login here: [Residential Customer Portal](#)

Username

Password

Log In

[Forgot Your Password?](#)

Link to Materials in the PUBLIC Knowledge Base:

<https://knowledge.nyserda.ny.gov/pages/viewpage.action?pageId=99877654>

Confluence

23 views

Edit

Save for later

Watching

Share

## Standards & Quality Assurance (SQA) - Combined Residential Application

The **Standards and Quality Assurance (SQA)** module allows NYSEDA and contracted Quality Service Providers (QSPs) to identify projects that are eligible for field inspections. A random sampling of projects are selected for inspection to verify that program and technical requirements have been met. The SQA module allows inspectors to document evidence of any non-conformance through photos and written documentation. Information collected by the inspector is uploaded into the Salesforce QA checklist and an inspection report is generated. The SQA module allows the Contractor to submit corrective action documentation as needed and for the program implementer (either initiative staff or an external company providing support) to respond.

**Audience: Participating Contractors**

Process Overview

Process Details

The NYSEDA Partner Portal

Responding to Corrective Actions

Training Resources

### Process Overview

The diagram below outlines the **SQA Process Steps** for the complete inspection process. The standard inspection process is outlined in the All Inspections row. If an inspection requires **Corrective Actions**, this process is included in the Correct Action Required Path. Generally speaking, Inspections without major or critical failures will typically end at the Review & Approve Inspection step in the All Inspections row. If there are any CAR Tasks, the process will include the **Corrective Action Required Path**.

### Process Steps

All Inspections

Procedure 1

QSP Scheduler

Schedule Inspection

Procedure 2

QSP Inspector

Configure Inspection Checklist

Procedure 3

QSP Inspector

Conduct Inspection

Procedure 4

QSP QA Manager

Review & Approve Inspection

# Q & A

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# Questions?