

Assisted Home Performance/ EmPower NY Monthly Program Update

Scott Oliver, Program Manager, Single Family Residential
David Friello, Senior Project Manager, Single Family Residential

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

July 1, 2022

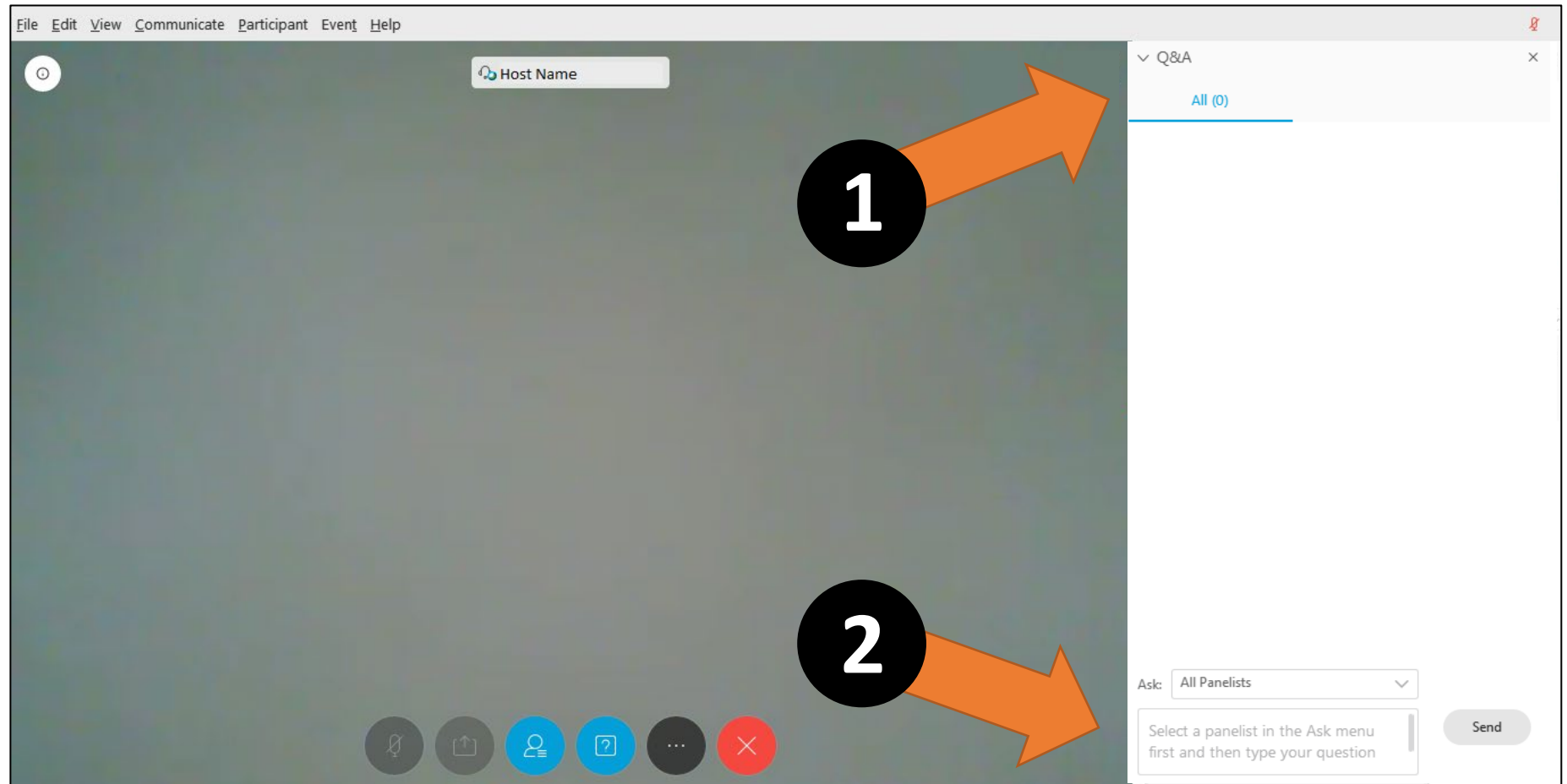


NYSERDA

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

OPTION 1 - TEXT

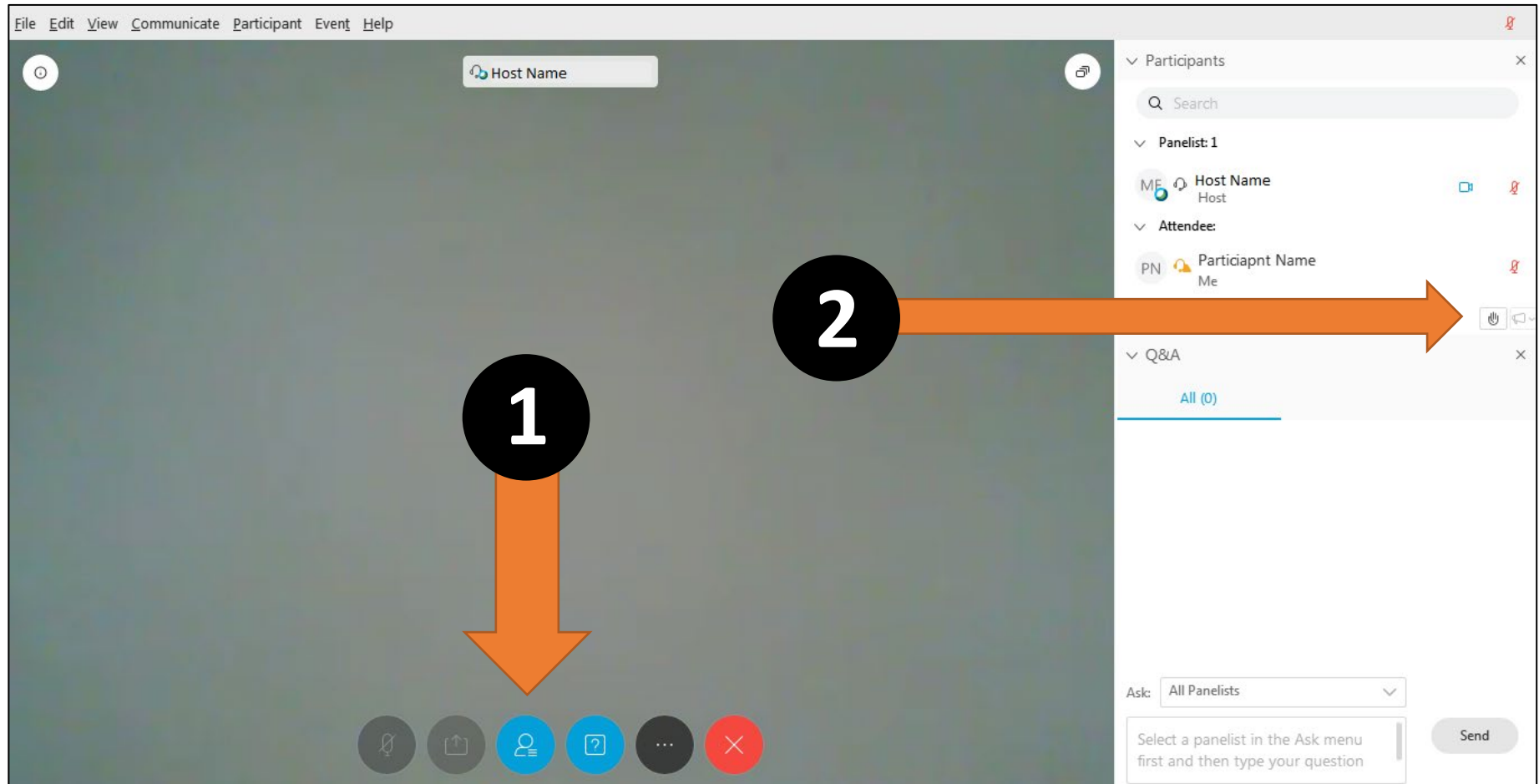
- > Locate the Q&A function in the upper right portion of your webinar panel.
- > Click on the small arrow to the left of "Q&A" to expand the text field.
- > Type your question into the text field and click "send."



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

- Case escalation process review
- Finance and Proforma Changes
- Attribution Logo
- Spanish Application
- Program Changes- Insulation Debris, Panel Box Clarification, IRS mileage, Delivered fuel price update
- AHP Audit Process Changes



NYSERDA

Case escalation process

- > Escalation process should be executed after you have taken the following steps:
 - Reviewed the Contractor Resource Manual
 - Reviewed Program announcements
 - Submitted a ticket to support.residential@nyserda.ny.gov
 - Worked with your Account Manager

Process to escalate a Case

Señor Residentia... ▾

Application Projects Project Invoices Manage Users Manage Eligible Vehicles **Cases** Project Inspections Knowledge Dashboards Case Tasks Generate Campaign

Case Number 00073094 Created Date 3/17/2022 7:08 AM

Customer in unique circumstances
Customer is in unique circumstances and I need to get an exception to proceed because of X, Y, and Z.

Status Active

Priority High

Case Owner Residential - Triage Queue

Feed Details

Case Detail

Escalate

Case Number	00073094	Case Record Type	Residential - Project Specific Question [Change]
Case Owner	Residential - Triage Queue [Change]	Request Type	Project Process
Contact Name	Señor Residential Test	Contractor Account Name	
Account Name	Residential Test Account	Customer Name	
Contact Phone			

▼ Residential Escalation Detail

Have you checked recent Program

Have you searched our Knowledgebase

Select Language ▾

Powered by Google Translate

Residential Escalation

Before escalating a Case to NYSERDA, please make sure you've checked the various resources available to you :

- NYSERDA Knowledgebase: contains helpful step by step instructions and video walk-throughs of certain program elements (i.e., how to submit a Combined Residential Application).
- Contractor Support website: the "go to" resource for contractors to access program related information. Including: Contractor Resource Manual, sign up for Program Announcements, Contractor Webinar and training recordings.
- Recent Program Announcements: announcements are sent out weekly intending to keep the contractor network up-to-date with updates in the program. If you missed the email, that's okay, they all get posted to the Contractor Support website.
- Contractor Support call line: speak to someone on the contractor support team that will help triage the question to the correct team members and expedite getting an answer
- Account Manager: when you need assistance with specific situations in the home, your account manager can help guide you through addressing the needs within program guidelines.

After those steps have been taken, if you still need to escalate the question or concern to NYSERDA please fill out the form below and provide details about why escalation is needed.

Have you searched the [EmPower/AHP Knowledgebase](#)? *

☐ Yes ☐ No

Have you searched [Contractor Support website](#)? *

☐ Yes ☐ No

Have you checked [Recent Program Announcements](#)? *

☐ Yes ☐ No

Have you spoken with **Contractor Support line (1-800-284-9069)**? *

☐ Yes ☐ No

Have you spoken with your [Account Manager](#)? *

☐ Yes ☐ No

Comments * ?

CANCEL

SUBMIT

Select Language ▼

Powered by [Google Translate](#)

Residential Escalation

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Have you spoken with your [Account Manager](#)? *

☒ Yes ☐ No

Comments * ?

I reached out to Bob and he hasn't answered me. Please help.

CANCEL

SUBMIT



Case Number 00073094

Created Date 3/17/2022 7:08 AM

Status Active

Priority High

Case Owner Residential - Escalation

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Feed

Details

Case Detail

[Escalate](#)

Case Number 00073094

Case Record Type Residential - Project Specific Question [\[Change\]](#)Case Owner Residential - Escalation [\[Change\]](#)

Request Type Project Process

Contact Name Señor Residential Test

Contractor Account Name

Account Name [Residential Test Account](#)

Customer Name

Contact Phone

▼ Residential Escalation Detail

Have you checked recent
Program Announce ☒Have you searched our
Knowledgebase ☒Have you searched Contractor
Support ☒Have you spoken with
contractor support ☒Have you spoken with you
Account Manager ☒Comments I reached out to Bob and he hasn't answered me.
Please help.

▼ Additional Information

Status Active

Program

Priority High

BPI Site Supervisor Certificate of Knowledge

- > NYSERDA has extended the free exam codes through the month of September 2022.
- > If you need your exam codes, please contact Keith Place at keith.place@nyserda.ny.gov

Green Jobs Green New York Financing



NYSERDA

GJGNY Financing Program Changes – Eligible Measures

Effective August 1, 2022

Fossil fuel heating equipment

NYSERDA will end GJGNY financing for delivered non-natural gas fuel heating equipment (oil, propane, kerosene, wood), except in a “no-heat” situation for low-to moderate-income (LMI) customers (customers with a household income of less than or equal to 80% of the Area Median Income). A “no-heat situation” is defined as a home where the primary heating source is inoperable, and the home cannot be served by the OTDA Home Equipment Repair and Replacement (HERR) program. Market-rate customers (customers with household income > 80% AMI) will not be eligible for the “no-heat exception”.

Natural gas furnaces

For installed natural gas furnaces, NYSERDA will now require electric savings from ECM motors included in the work scope, be 96% efficient, and replace a furnace that is 80% efficient or less. Mobile Homes may use 95% mobile home rated furnaces.

GJGNY Financing Program Changes – Eligible Measures (con't)

Fossil fuel water heating equipment

NYSERDA will be financing only heat pump water heater (HPWH) and electric resistance domestic hot water equipment will be financed. Financing will end for fossil fuel water heaters except in health and safety situations where power vent natural gas water heaters may be installed when HPWH are not viable. It is recommended that electric resistance heaters only be used in those cases when a HPWH cannot be installed, and the existing water heater is non-functioning. Only HPWH will be prequalified measures.

Electric to natural gas dryer conversions

No longer eligible for financing

GJGNY Financing Program Changes – ProForma

New Web ProForma (ProForma Plus) – Launch August 1, 2022

- Web Portal to access
- Instruction manual to be provided
- Excel ProFormas will be discontinued
- Contractors must complete energy assessment in:
 - EmpCalc (AHPwES projects)
 - Residential Energy Audit Tool (Market rate projects)
 - Compass (Comfort Home projects)
 - ASHP and GSHP Excel workbook (NYS Clean Heat projects)
- Contractors must manually enter savings from these tools into Web ProForma to calculate loan cost effectiveness

Attribution Logo

Per the Program Announcement on 05/12/22:

- Participating Contractors seeking to submit new marketing material to NYSERDA should request the updated logo for inclusion in on digital or paper materials. Any new material must be reviewed and approved. To obtain a copy of the new logo, submit a request with draft copy to diane.welch@nyserda.ny.gov



NYSERDA
Participating Contractor

Attribution Logo

Participating Contractors can use any existing printed stock until depleted. Digital material should be updated as soon as possible. Contractors seeking the logo for previously approved materials may contact erik.gilbert@nyserda.ny.gov or email hpwes@nyserda.ny.gov for a high-resolution copy of the logo. Contractors should include a copy of the approved material in their request.

- For additional information on the use of the attribution logo, please refer to [Section 12.3](#) of the Contractor Resource Manual
- If you have any questions, please reach out to your account manager.

Spanish Translation

- Spanish translation of the Contractor Resource Manual now available as a [.pdf download](#), which can be accessed on the Contractor Support Site in Section 3.2.
- NYSERDA has also updated the [Combined Residential Application webpage](#) and the [Apply for EmPower NY webpage](#) with downloadable files of the Spanish translation.
- NYSERDA will be considering additional translations of the Combined Residential Application in the upcoming months.

Poll

Which language should NYSERDA prioritize for the next translation of the Combined Residential Application?

Eligible Measures List: Update and Clarification

Limited Prequalification for Insulation/Debris Removal

Insulation/Debris Removal, a Qualified Accessory on the [EmPower NY & Assisted Home Performance with ENERGY STAR® Eligible Measures List \(CRM 5.15\)](#), will be considered prequalified up to \$500 (Tier 1) or \$250 (Tier 3). This update is effective with the release of EmPCalc v8.1.8 for projects submitted on or after Thursday, June 30.

Photos of the insulation/debris removal are required at project submission. The photos should accurately reflect the reason that was provided in the EmPCalc note.

As a reminder, photos of the following are required for all EmPower and Assisted Home Performance projects: All exterior sides of dwelling, refrigerator(s), freezer(s) (if present), HVAC (Heating and cooling systems, water heater), pre-existing insulation levels (attic, sidewalls, rim joist), other targeted measure(s) for replacement and exception requests.

Eligible Measures List: Update and Clarification (continued)

Clarification on Main Panel Electrical Service Upgrades on OTDA Funded Projects Only

Main Panel electrical service upgrades are only eligible for Program incentives when installing new ASHP/GSHP heat pump equipment, not Heat Pump Water Heaters (HPWH) on OTDA funded projects.

When proposing this measure, if an existing panel box is ≤ 100 Amps a NEC worksheet is not required as preliminary information has indicated that panel boxes 100 Amps and smaller should be upgraded. If the home requires greater than 100 Amp service, a NEC worksheet must be completed indicating the need for the larger service. Project submission documentation must provide a photo of the pre-existing panel box and an invoice for the replacement panel box. Panel box work may include risers and other measures associated with the main electrical supply, including permits. Individual supply lines and boxes for the heat pump should be included in the cost of the heat pump.

CRM Section 5.6 | [OTDA Funding for Heat Pump Projects](#)

CRM Section 5.10 | [EmPower NY & Assisted Home Performance with ENERGY STAR® Eligible Measures List](#)

Updated Regional Delivered Fuel and Mileage Rates

NYSERDA Updated Regional Delivered Fuel Rates

Regionally delivered fuel rates used by the program were updated and were posted to the Program Documents and Tools section of the Contractor Support site.

[New York Home Performance with ENERGY STAR® Energy Pricing](#)

IRS Mileage Rate Increase to \$0.625

The IRS announced updated mileage rates for business travel from \$0.585 to \$0.625 beginning July 1 through the end of 2022. The EmPower pricing has been updated.

CRM Section 7.7 | [EmPower NY Pricing](#)

EmPCalc v8.1.8 has been updated to reflect both of these changes.

EmPCalc Updates

EmPCalc v8.1.8 is available. Notable updates include:

- Additional KEDNY Equity Pilot measures (v8.1.7)
- Region now auto-populates based on project location's zip code
- Refrigerator/Freezer kWh now calculates based on size and configuration
- Insulation Accessories rearranged and auto-calculates total costs
- Update Mileage Rate to \$0.625
- Updated Regional Delivery Rates
- Message alerts when data is missing
- Insulation location now included in Summary tab
- Fixed formatting issues on Audit PDF

AHP Audit Process Changes

Current Process

Failed audits follows the process of notifying the contractor of necessary corrections through a case in the Salesforce Residential Case System. Contractors are then required to submit corrections via the case for payment to be released. If corrections are not made within 14 days of notification, the case will be closed, and payment will remain withheld.


New Process

Audit projects that fail review and require corrections made by the contractor will be sent back directly in the Uplight Portal. They will appear within the contractor's Uplight Dashboard. A failed project will be rolled back to Audit Claim stage with a canned note explaining the reason for the failure and what corrections are required for payment to be released. To receive payment, corrections need to be made and resubmitted through the Uplight project for review. Similar to current process, if corrections are not made within 14 days the project will be closed and payment will be withheld.

AHP Audit Process Changes

- The project can be found in the “ARE ON-TRACK” section of your Uplight Dashboard.
- The project will say “Next step: Complete Audit Claim”.
- Scrolling down below the Audit Claim stage to the Project Timeline you will find the audit failure note with a reason as to why the audit failed.

All Programs



Change logo »

NYSERDA
Participating
Contractor

6208 Oak Hill Circle
Suite 3000
Rensselaer, NY 01581

181
ACTIVE PROJECTS

See all »

13
HAVE NEW
ASSIGNMENTS

161
ARE PAST-DUE

7
ARE ON-TRACK

Due in 85 days

Next step:
Complete Audit Claim...

Assigned 5 minutes ago

Project Timeline ☐ Show archived tasks + Expand All

Jun 30

Note: Audit Failure - Customer information is missing or inaccurate.

Lindsay Huba (NYSERDA I...

Moved to Audit Claim stage

Lindsay Huba

Reactivated to Audit Claim Review stage

Lindsay Huba

Automated workflow disabled

Lindsay Huba

Advanced to Closed - Complete stage

Automatic Workflow

Reactivated to Audit Claim Review stage

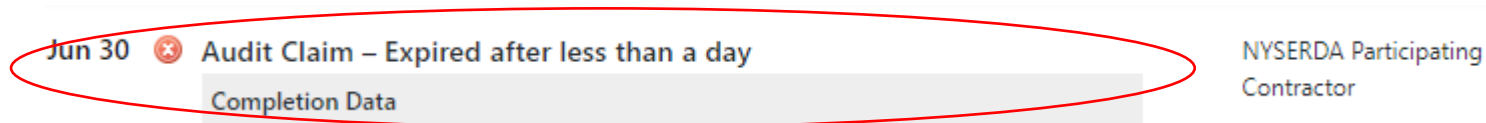
Lindsay Huba

Advanced to Closed - Complete stage

Automatic Workflow

AHP Audit Process Changes

- If failed audits are not corrected and resubmitted within 14 days from the project being returned, it will be closed out within the Uplight Portal and payment will be withheld.
 - Example:
 - Audit fails and is returned to the contractor on 6/30/2022 indicating the reason for the failure.
 - The contractor does not make the necessary corrections and resubmit.
 - 7/14/2022 – the project is closed for unresponsiveness to the correction and payment is withheld.



If you have questions on the updated process or when an audit fails, please reach out to Contractor Support at 800-284-9069 or support.residential@nyserda.ny.gov .

Audit Failure Reasons

Category	Description	Criteria	Exceptions	Exception Action
Utility Usage Info	12 months of electrical and heating fuel usage information uploaded or properly completed waiver	Pass: Information present Fail: Information not present	Contractor provided waiver, not properly completed, has customer signature. Contractor provided full 12 months of one type of usage, less than or no usage or improper waiver for second. Only provided utility usage graph.	First identified failure, issue warning letter to contractor with submission guidelines. Repeated occurrence, proceed with Failure Action.
Audit Report	Completed audit report is uploaded as a PDF from a program-approved software	Pass: Program-approved report present as PDF. Fail: Program-approved report not present or not in PDF format.	TIF files are also reviewable and are allowed.	n/a
Customer Information	Customer name and address are accurate and consistent with Portal	Pass: Customer name and address accurate and consistent. Fail: Information missing or not accurate. Note: Must be sure that personal info for the wrong customer is not showing.	Minor Name discrepancies are not a problem.	n/a
Recommended Measures	Audit report includes a detailed, itemized list of recommended measures with quantity and cost information	Pass: Recommended measures list present with itemized costs. Fail: Recommended measures list not present or missing costs.	None	n/a

Category	Description	Criteria	Exceptions	Exception Action
Energy Savings	Audit report includes energy savings calculations	Pass: Energy savings calculations information present. Fail: Energy savings information not present or incomplete.	Nona	n/a
Primary Fuel	Utility usage information matches the primary fuel reported in Audit report	Pass: Primary fuel listed in report matches the fuel usage submitted to Program. Fail: Primary fuel listed in report does not match the fuel usage submitted to Program.	None	n/a
Signed CoC	A signed CoC needs to be submitted on all projects that included Direct Install measures	Pass: the CoC is submitted and signed by the customer. Fail: the CoC is not submitted or signed by the customer.	None	n/a
Energy Education on CoC	Energy Education should be included as part of the submitted and signed CoC	If it is missing, it does not result in a failure. Rather, these should be noted and sent to the Associate Program Manager or the Operations Supervisor.	None	n/a
Ineligible measure, quantity or \$ amount	Non DI measures cannot be installed. There are \$ thresholds and quantity thresholds as well.	If any of these are exceeded or ineligible measures are included, a failure case sure be created and the project should be reactivated and rolled back.	None	n/a

Q & A



Questions?



NYSERDA