NYSERDA

EmPower/AHP Program Update

November 5, 2021

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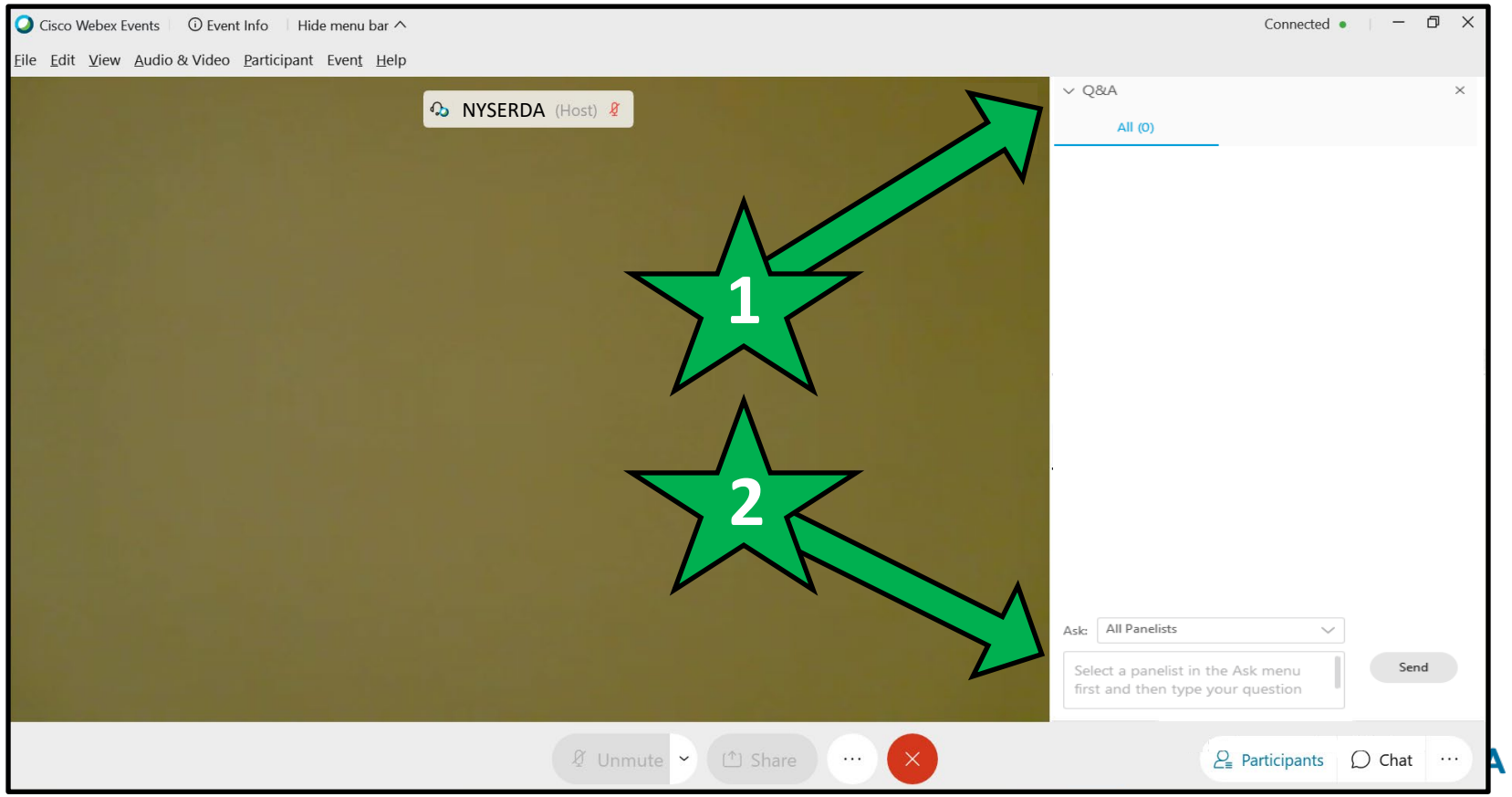
Q&A - Using Text

1. 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.

2. Type your question into the text field and click “send.”



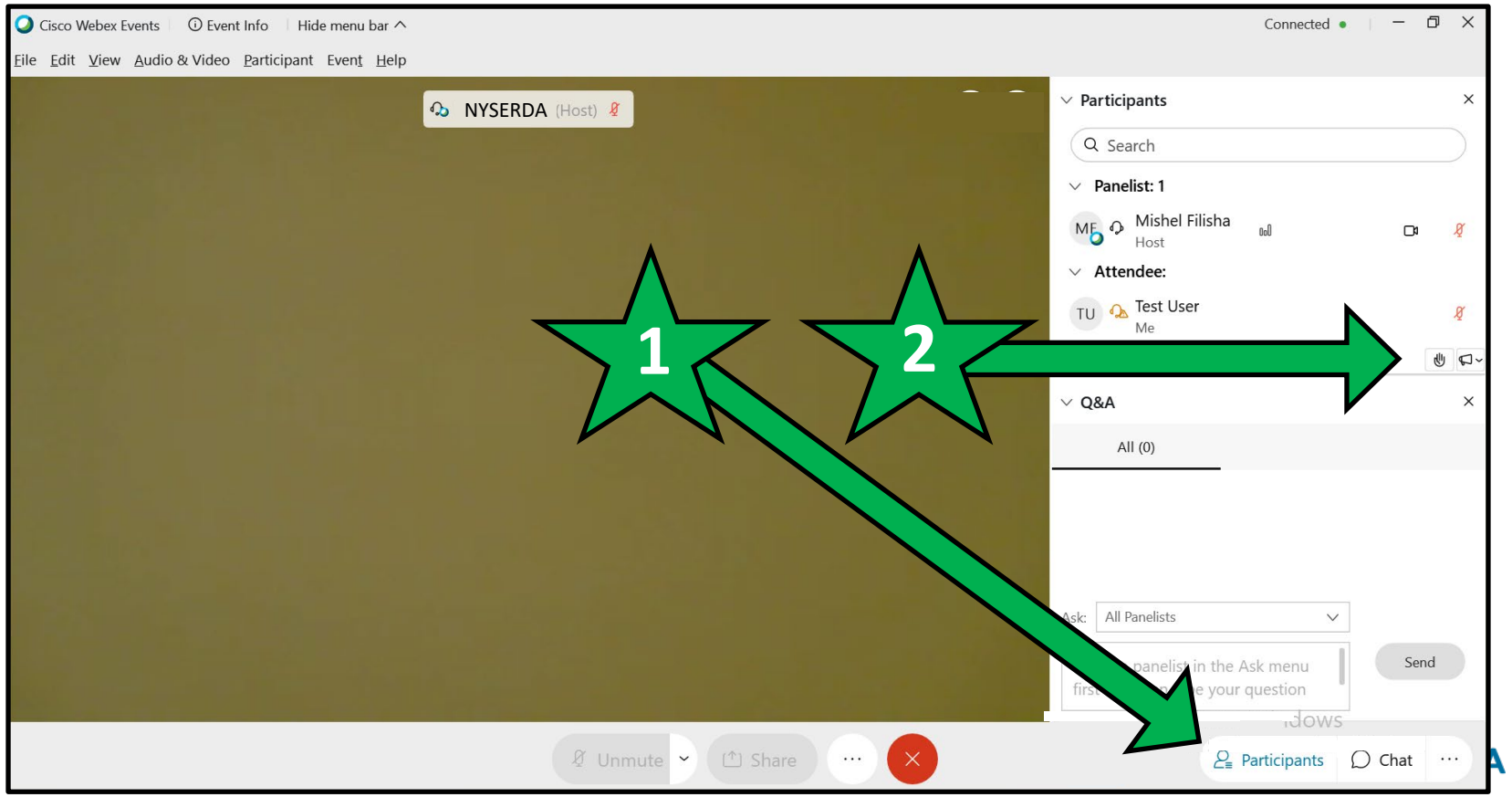
Q&A - Using “Raise Hand” and Microphone/Phone

1. Open your participant panel using the oval icon near the bottom of your screen.
2. 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

- SQA update
- EmPower Pricing Update
- Salesforce Enhancements/Updates

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Standards and Quality Assurance Update

November 5th, 2012

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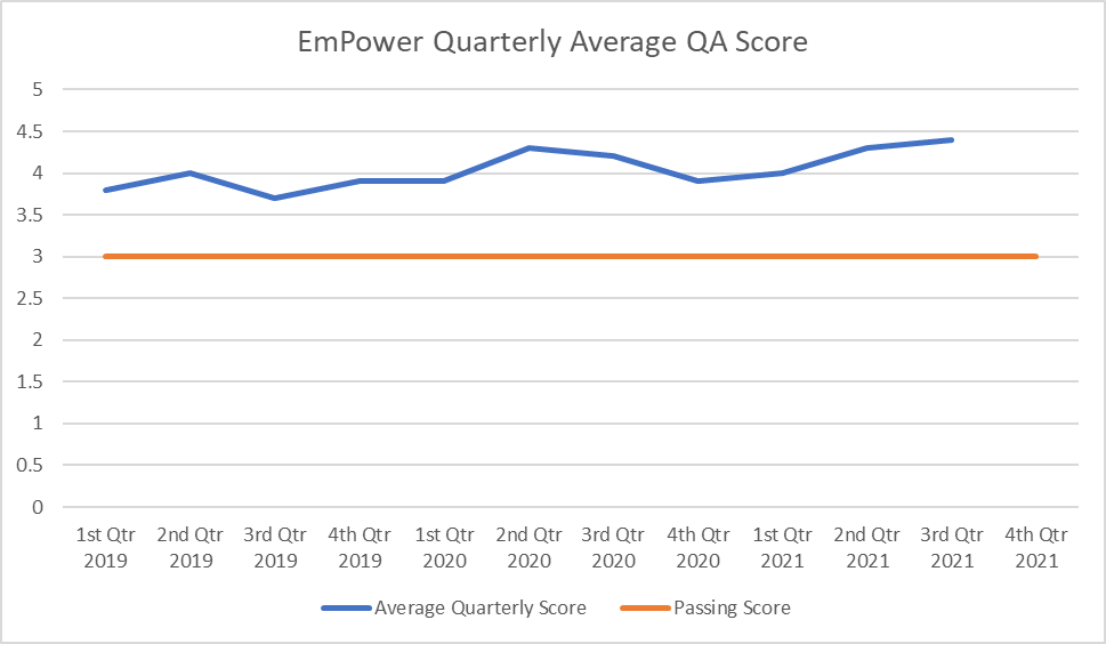
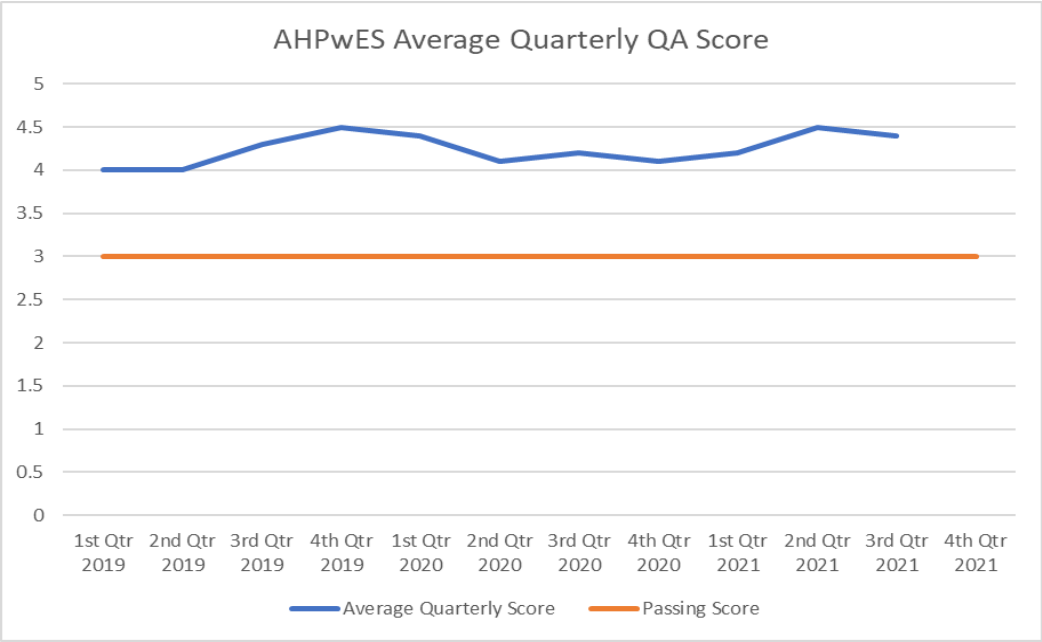
Quality Assurance Results – Average QA Scores





- **Average score of around 4.0 in both EmPower and AHPwES indicates high quality work in both programs**

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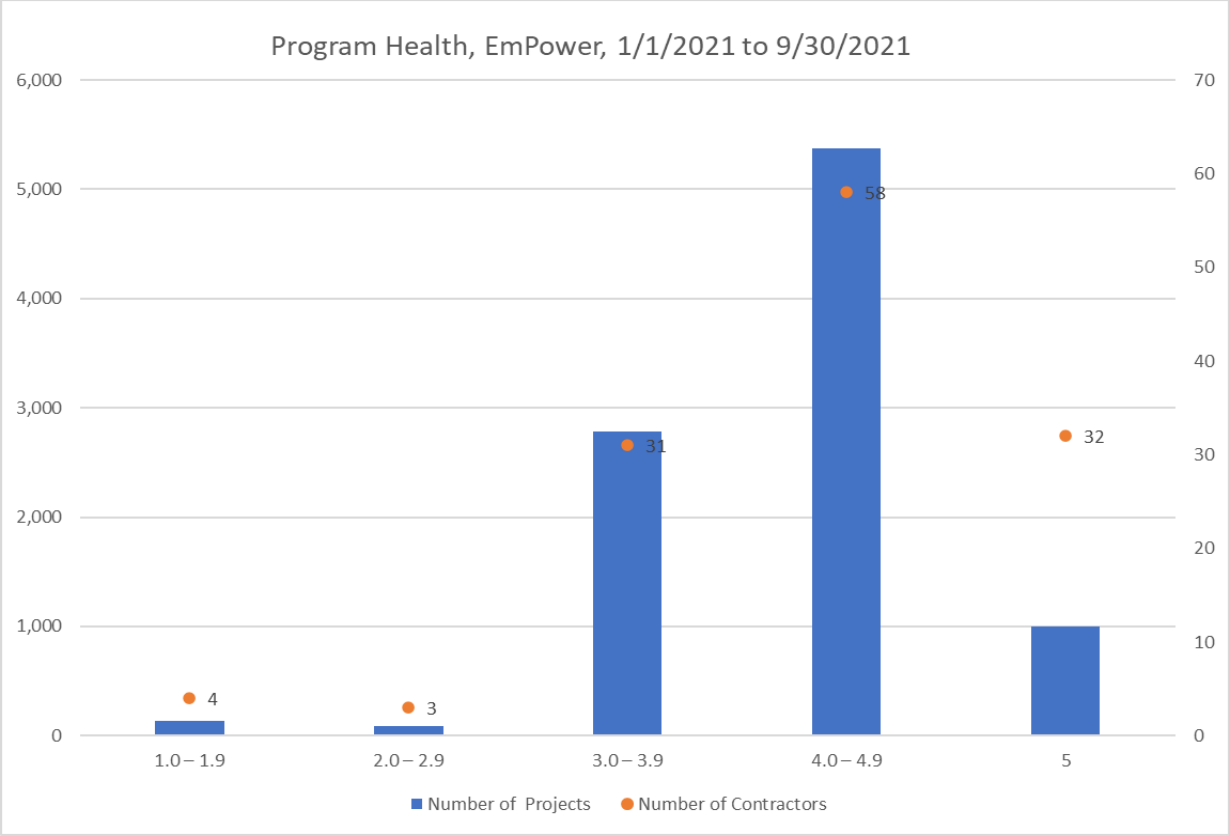
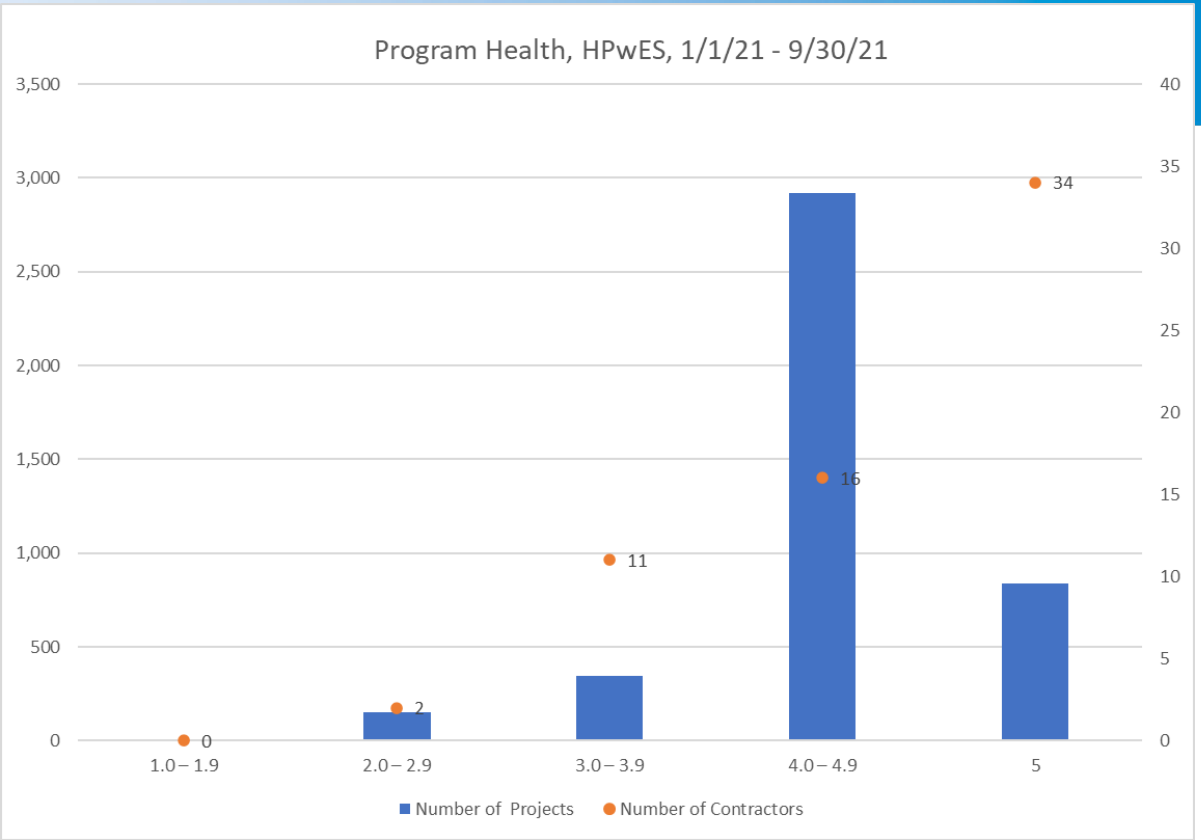
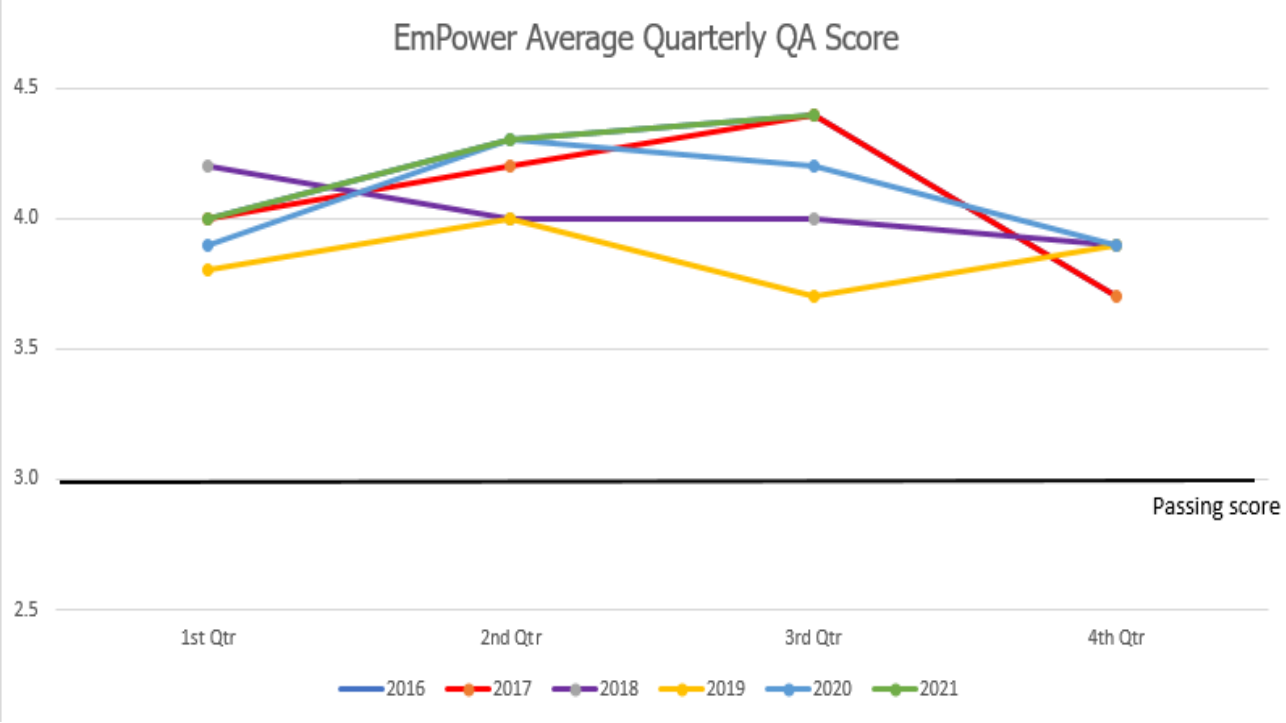
Quality Assurance Results January 1st, 2021 – September 30th, 2021

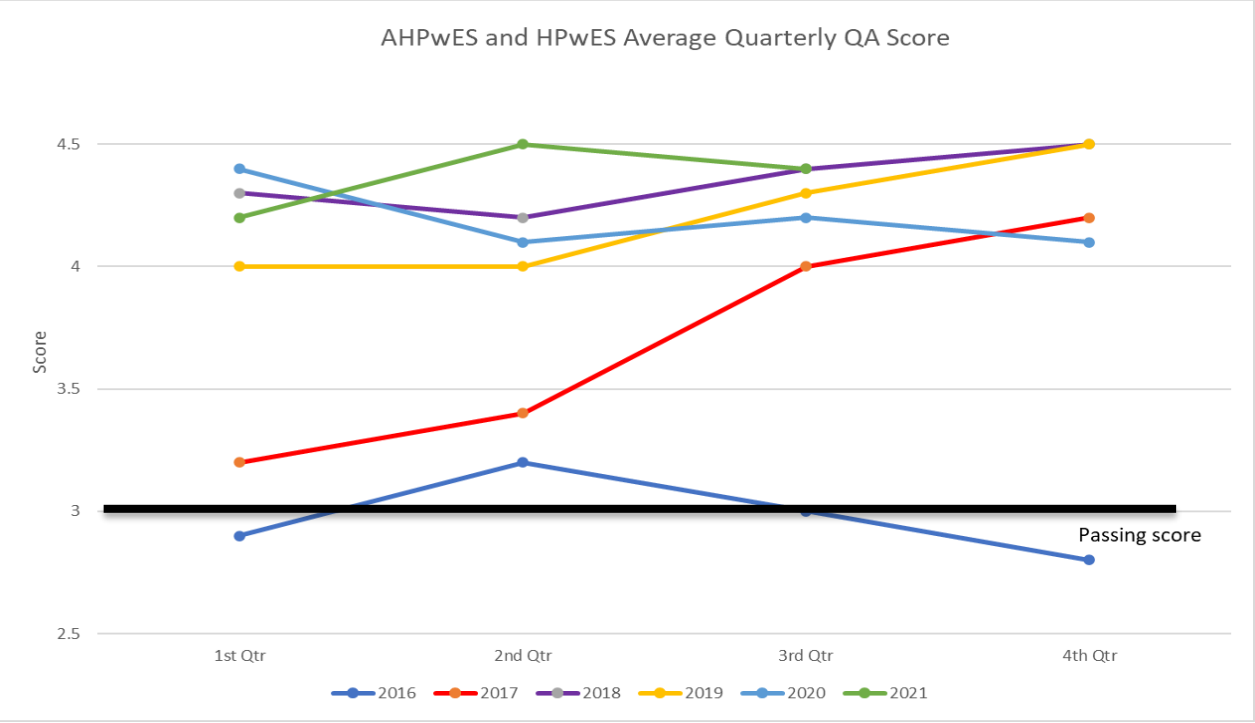




- **EmPower: 1197 projects inspected, 95% of inspected projects passed, with 83% of contractors completing these jobs**
- **AHPwES: 332 projects inspected, 97% of inspected projects passed, with 83% of contractors completing these jobs**

Quality Assurance Results – Average QA Scores





- **Average score of around 4.0 in both programs indicates high quality work in both programs**
- **Quality has held steady over the past 2+ years and have consistently increased since 2016**

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Quality Assurance Results July 1st, 2021 – September 30th, 2021 Non-conformances

58% of non-conformances observes during the 3rd quarter of 2021 were in the categories of critical and major

The five most common:

1. **Exhaust fans vented properly (Major)**
2. **Attic insulation specified R-value and quantity installed (Major)**
3. **CO, Smoke or combination CO/smoke detectors have been installed (Critical)**
4. **Basement air sealing completed as contracted (Major)**
5. **Contracted weatherstripping installed on exterior doors (Minor)**

Recent Quality Assurance Activities/Improvements QA Inspection Checklist

- **Finalized the Energy Affordability and Equity QA inspection checklist, planned to be implemented with revised program and Salesforce module completion**
  - **Reevaluation of non-conformance categories**
    - **Photo submissions for inaccessible attics - non-conformances reduced from major to minor**
  - **Checklist measures:**
    - **47% reduction (69 to 35)**
    - **Realigned with EmPower + redesign**
  - **Checklist tasks:**
    - **66% reduction (501 to 171)**

- **Checklist was launched in QACSS in August 2021**

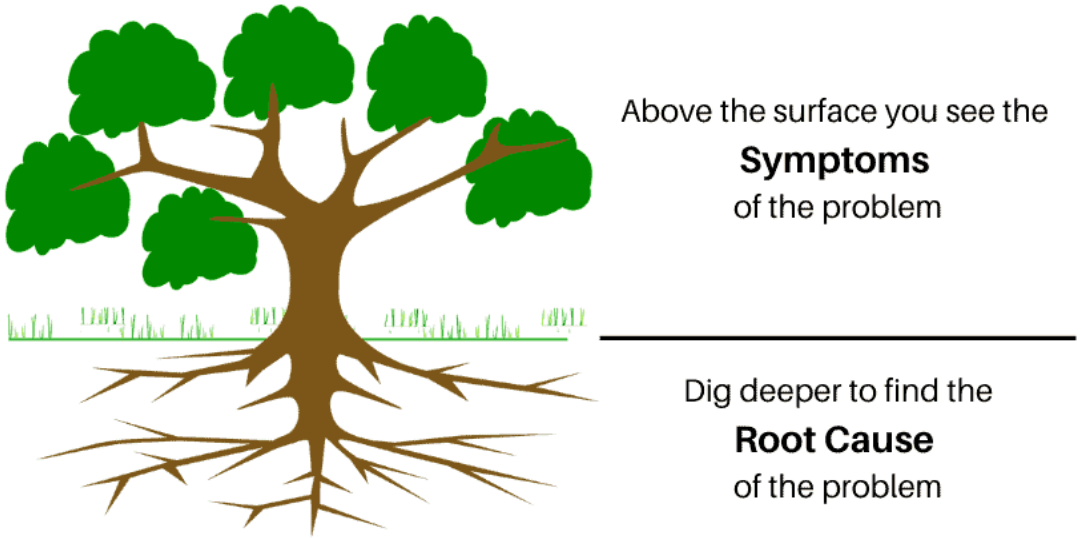
Recent Quality Assurance Activities/Improvements Root Cause Analysis

Root cause analysis is a method of solving a problem at its source, rather than just treating the symptoms.

If you've ever tried solving a problem, but it shows up again and again, you're probably not getting at the root cause.

Root cause analysis is usually one part of a problem-solving or decision-making process. You perform a root cause analysis first, so you know which problem is the right one to solve.

Recent Quality Assurance Activities/Improvements Root Cause Analysis



Most common observed non-conformance: Correct Quantity Installed; LED lightbulbs

What is Quality Assurance Data Used For?

- **Overall Program Health and Due Diligence**
  - Compliance with program requirements
  - Consumer protection and stewardship of public funds

- **Continuous Improvement and Market Support**
  - Tracking and trending non-conformances (State, Region, Contractor)
  - Root cause analysis to understand why critical non-conformances occur (just started)
  - Workforce training opportunities
  - Quality Control
    - Contractor Tools
    - Program Quality Control Assistance

- **Program Measurement and Verification**
  - Data feeds into Evaluation Measurement and Verification, EM&V, studies

Quality Assurance Additional Enhancements and Timing

- Modified the Scheduling Questions and "Pass/Fail" wording on inspection reports
  - Sept 2021 questions were updated, and IT removed the word Fail from the top of the inspection reports
- Rolling out Root Cause Analysis with contractor expert panel involvement
  - Late September 2021 – Training for Contractor Expert Panel
  - Early October 2021 – Roll out
- Retiring QACSS and moving toward SalesForce
  - Early 2022
- Building Contractor Score Cards – Once SQA module is in SalesForce
  - QA scores: Contractor and Program average
  - QC information
  - Customer Satisfaction Survey Results
  - Non-conformances: Contractor and Program
  - Realization Rates

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Thank you.
Have a Quality Day!

EmPower Pricing Survey

EmPower Pricing Survey

Survey will help program understand current material pricing and will help to determine if future adjustments are needed.

- Each company was provided with unique URL sent to the primary listed on their NYSERDA Partnership Agreement
- Only one survey is to be completed per company (not required to be primary but sent link must be used)
- Evaluate pricing schedule based on business address

  - **Part I:** 15 questions about your company and the EmPower work performed. *~ 10 minutes to complete*
  - **Part II:** While optional, completion of this section will help the program make the most informed decisions regarding measure level pricing. Asks you to evaluate and provide feedback on EmPower pricing for each measure. *~ 30-45 minutes to complete*

The survey due date has been extended to allow more time for contractors to complete it. The revised due date is **November 10, 2021**.

If you experience technical issues while completing the survey or have questions, please email tech.updates@clearesult.com. If you have not received an email with a link to the survey, please reach out to your account manager or send an email to tech.updates@clearesult.com.

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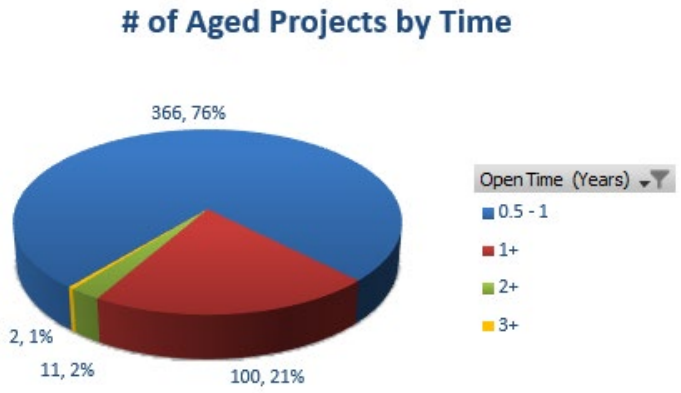
EmPower Aged Projects

Under normal circumstances, EmPower projects are required to be completed in 120 days (HP) or 60 days (ER) as stated in Article VIII, Section 8.05(d) of the Participation Agreement. However, NYSERDA understands that continued supply chain issues, staffing challenges and customer concerns of COVID exposure risks have impacted project timelines.

Despite potential project delays, program staff will continue to conduct regular outreach to contractors with projects that are over 6 months old to track delay reasons and obtain potential completion dates. Please respond to these requests so that impacts can be shared with program staff for decision making.

Project Stages	# of Projects
Workscope Submission	624
Final Project Submission	479
Total	**1103**



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NYSERDA Portal (Salesforce)
Combined Application Enhancements

NYSERDA Portal (Salesforce) Combined Application Enhancements

Contractor Name

- Contractors with a **DBA** will now appear in the customer-facing Contractor Selector Tool as their DBA name.
- Contractors that do not have a DBA will continue to appear in the customer-facing Contractor Selector Tool with their legal name.

Contractor Selector Tool

- Contractors can set up their territory by County or Radius.
- If using radius, it is based on the center of the zip code and the number of miles chosen by the contractor.
- All options appearing in the Contractor Selector Tool are shown in a randomly rotated list.

Chatter Feed

- The chatter feed circumvents certain logic elements in the Combined Residential Application which leads to process slowdowns. For this reason, it has been disabled on the Combined Residential Application project record.
- To update an application with additional documentation please see the FAQ guidance document on “How do I upload documents after the application is submitted?”

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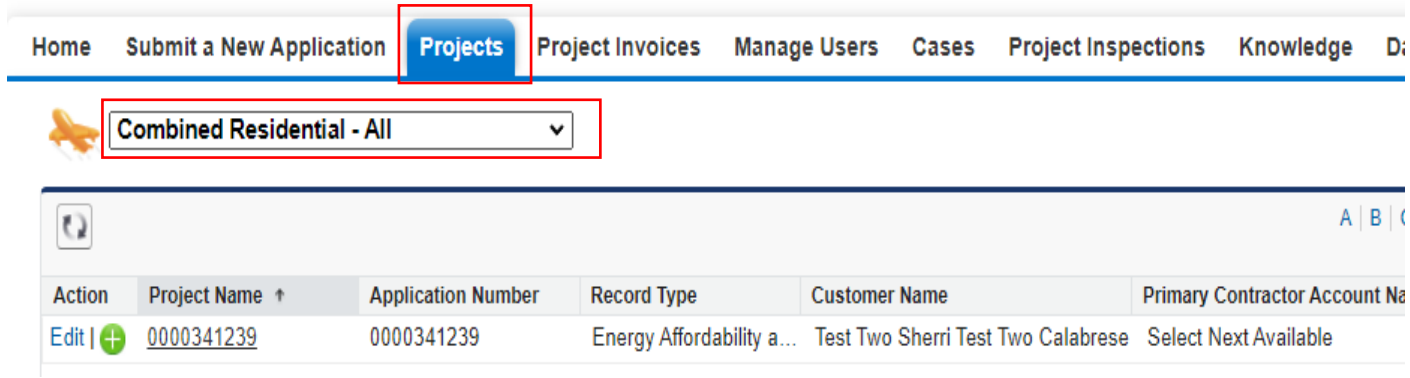
NYSERDA Portal (Salesforce) Combined Application Enhancements

Application Visibility

- Contractors have immediate access to any application they have submitted.
- Contractors also have access to applications submitted by other entities (i.e., directly by the customer) where they have been selected in the Contractor Selector Tool within 30 minutes of submission.
- Applications are considered submitted when the “Submit” button has been selected on the final page of the application.



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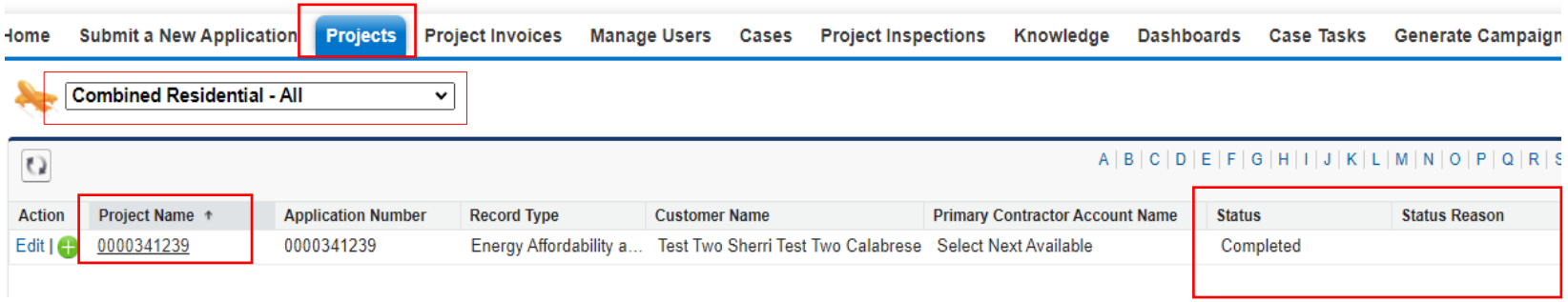
NYSERDA Portal (Salesforce) Combined Application Enhancements

Application Status

- Contractors have visibility into the current Status and Status Reason for any application that has been shared with them.
- Status Reason field is populated when additional information or documentation is needed.
- Both the Status and the Status Reason fields are displayed in the Projects list.
- Clicking on the Project Name link will allow contractors to see additional details.



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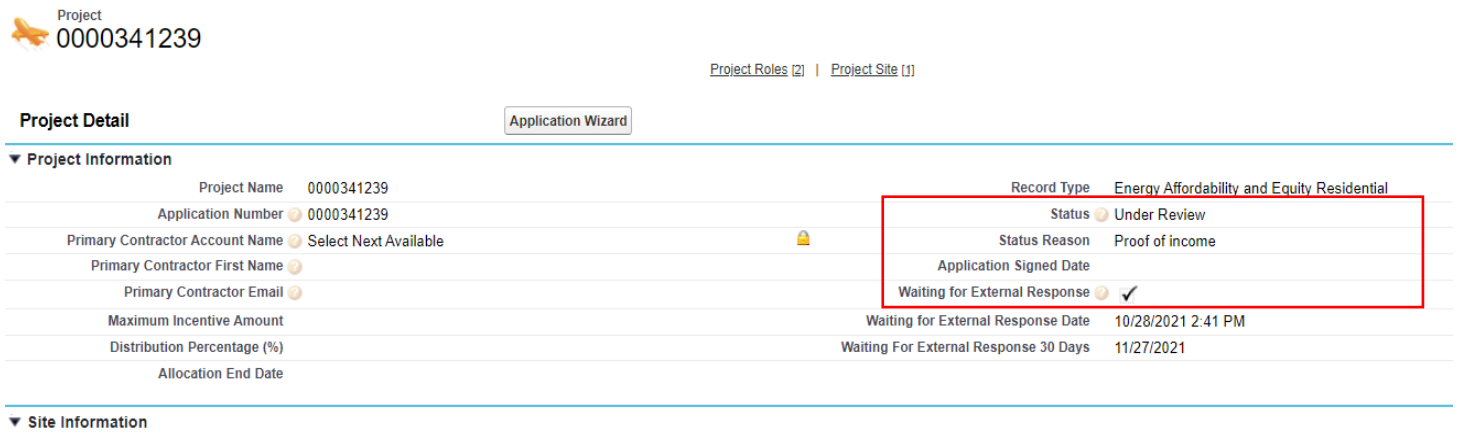
NYSERDA Portal (Salesforce) Combined Application Enhancements

Application Status - cont.

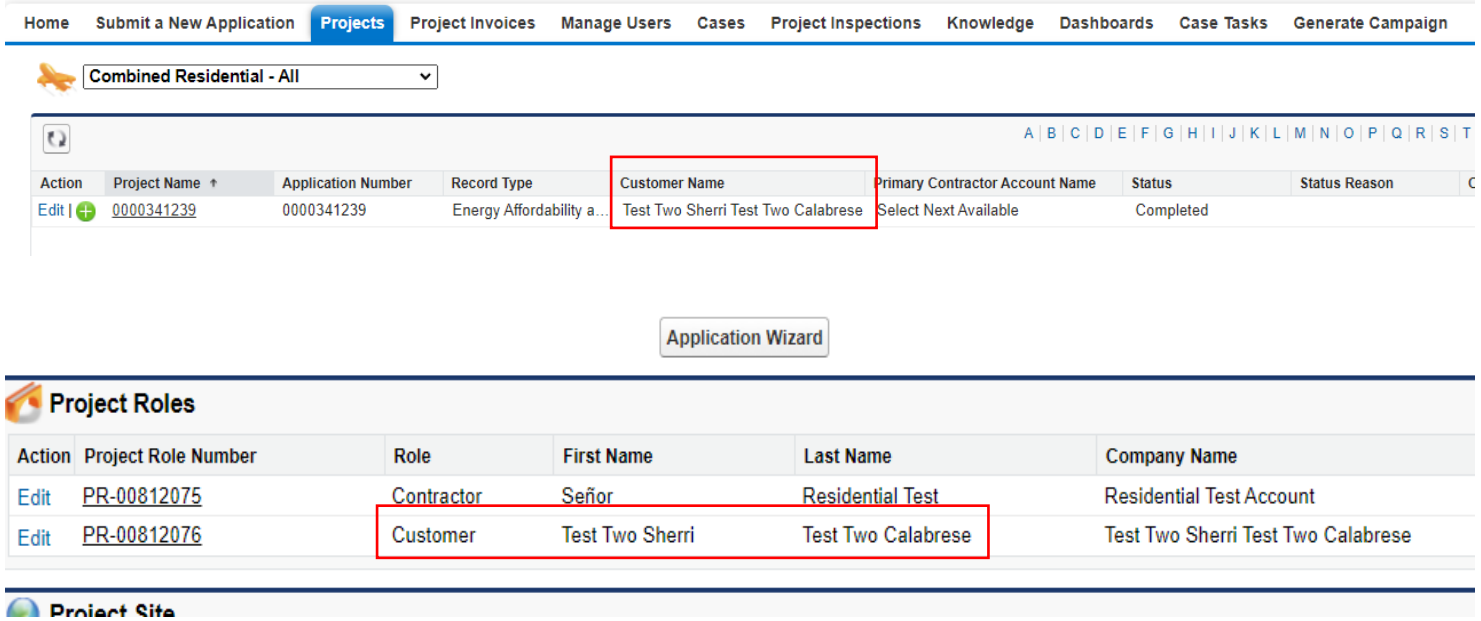
- After clicking on the Project Name link from the Projects list, the application record is open.
- Contractors can see the “Waiting for External Response” checkbox.
  - When this box is checked, the implementation team has requested additional information from the customer and is waiting for a response.
  - When a response is received, the checkbox is unchecked.



NYSERDA Portal (Salesforce) Combined Application Enhancements

Application Status – cont.

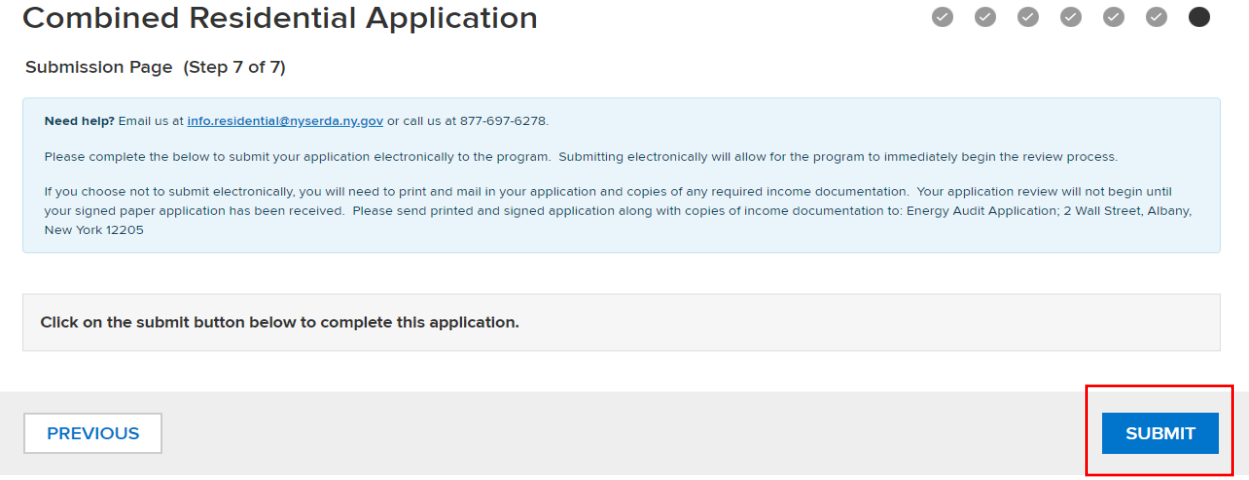
Please Do *Not* change the Project Name, it is intentionally set to match the Application Number. Changing the Project Name may delay processing. Customer Names are now visible in both the Projects list and in the Project record.



NYSERDA Portal (Salesforce) Combined Application Enhancements

Incomplete Applications

- An application is not considered complete until the “Submit” has been selected on the last page of the application.
- Prior to clicking the Submit button, the application remains in “Unsubmitted” status.
- Reminder emails are sent to applicants where possible to complete the application process.
- Customers or contractors can complete the application at anytime prior to 60 days.
- After 60 days of unsubmitted status, the application is archived and a new application will need to be created for them to proceed.



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NYSERDA Portal (Salesforce) Combined Application Enhancements

Income Input Totals

- Annual Income and Total Household Income fields have been added to the application.
- Annual Income converts an individual income source into an annual income by using the Gross Amount and Frequency inputs.
- Total Household Income totals all of the annual income amounts together.

Test Smith

AGE	FULL TIME STUDENT?	GROSS AMOUNT	INCOME SOURCE	FREQUENCY	ANNUAL INCOME	VERIFICATION METHOD	EDIT / REMOVE
25	No	200.00	Salaries / Wages	Weekly	10400.00	Paystubs	

ADD INCOME SOURCE

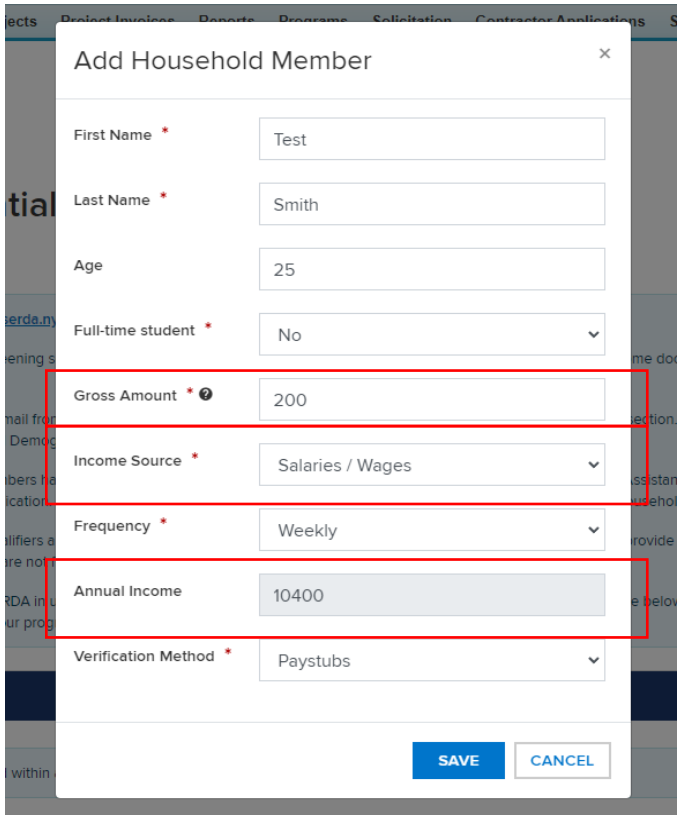
Test Two Smith

AGE	FULL TIME STUDENT?	GROSS AMOUNT	INCOME SOURCE	FREQUENCY	ANNUAL INCOME	VERIFICATION METHOD	EDIT / REMOVE
	No	100.00	Social Security	Monthly	1200.00	Benefit Award Letter	
	No	50.00	Pension	Bi-Weekly	1300.00	Benefit Award Letter	

ADD HOUSEHOLD MEMBER

ADD INCOME SOURCE

TOTAL HOUSEHOLD INCOME $ 12900.00



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NYSERDA Portal (Salesforce) Combined Application Enhancements

Campaign Code

- When a customer accesses the application from a Campaign Code link, the first time they click Submit A New Application, their application will be associated with the partner that originated the Campaign Code link.
- If the same customer accesses the application again from the same or different Campaign Code, the first time they click Submit a New Application after login, the application will be associated with the partner that originated the Campaign Code link.
- If a customer navigates to the NYSERDA website directly or creates additional applications while logged in, their application will not be associated with any partner unless they select them from the Contractor Selector Tool or the Organization Selector Tool on the Partner page (page 3) of the application.

EXAMPLE:

- Contractor A generates a campaign code and sends it to Customer 1.
- Customer 1 clicks the link, registers for an account, and fills out the application. This application will be associated with Contractor A.
- 6 months later, Contractor B generates a campaign code and sends it to Customer 1.
- Customer 1 clicks the link, logins into their existing account and starts a new application. This new application will be associated with Contractor B.

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NYSERDA Portal (Salesforce) Combined Application Enhancements

Internal Improvements

- A number of other improvements were made to assist the implementation team with improving processing times. Examples:
  - Updates to the data transfers between the NYSERDA Portal and NY HP Portal
  - Consolidated visibility to key data fields for easier editing.
  - Improvements to electronic communications to update project records more quickly.

Thank you

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