

Single Family Residential Program Update

Scott Oliver, Program Manager
David Friello, Senior Project Manager

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

October 7, 2022

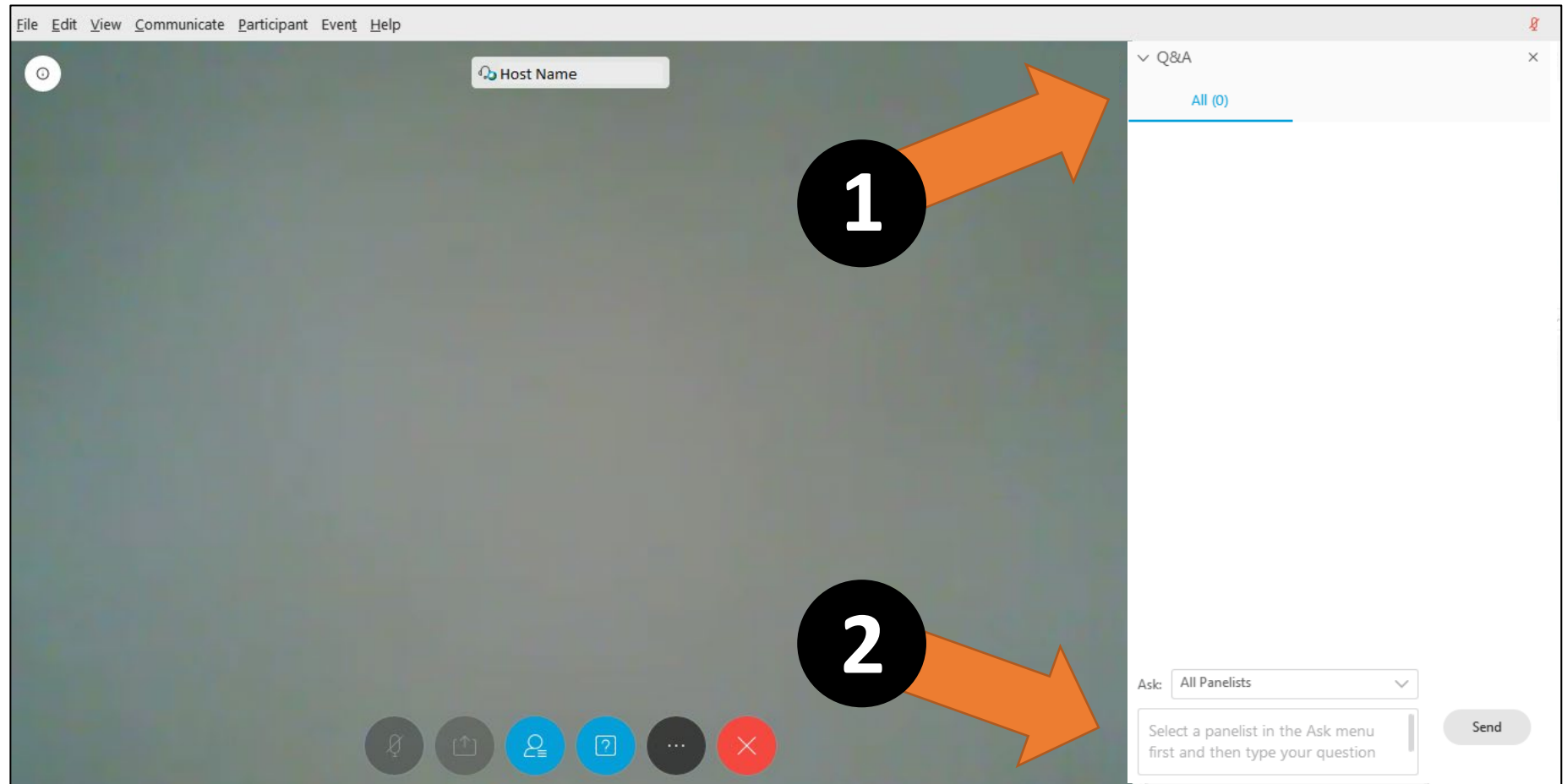


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Options for Q&A During Today's Webinar - Text

OPTION 1 - TEXT

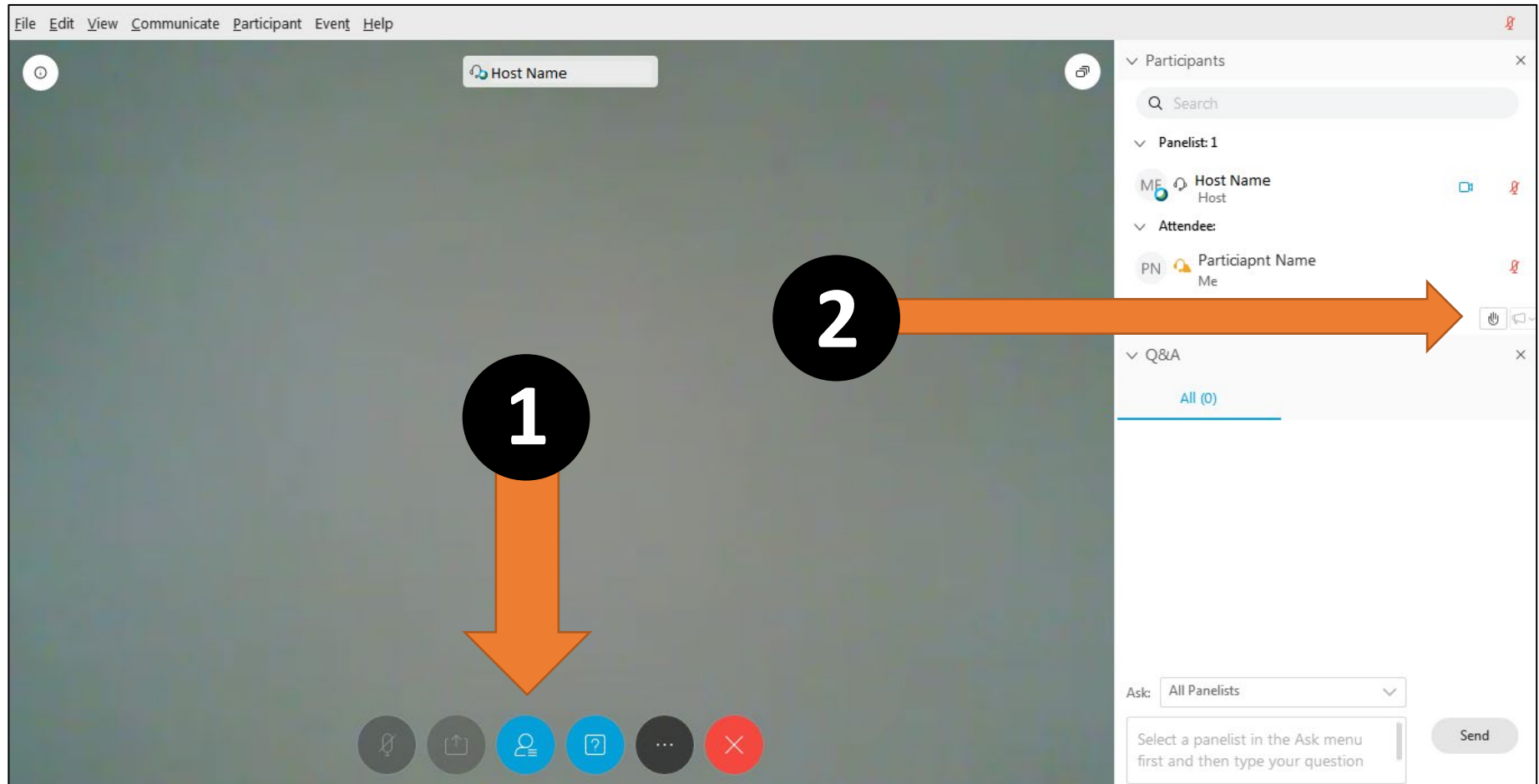
- > Locate the Q&A function in the upper right portion of your webinar panel.
- > Click on the small arrow to the left of "Q&A" to expand the text field.
- > Type your question into the text field and click "send."



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

1. Contractor Portal Replacement
2. Case escalation summary
3. Project Completion Timeline
4. Appliance Delivery



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Today

Our next step to achieving our goals

How the new contractor portal supports you

The approach and timeline

You are a key partner in this process!

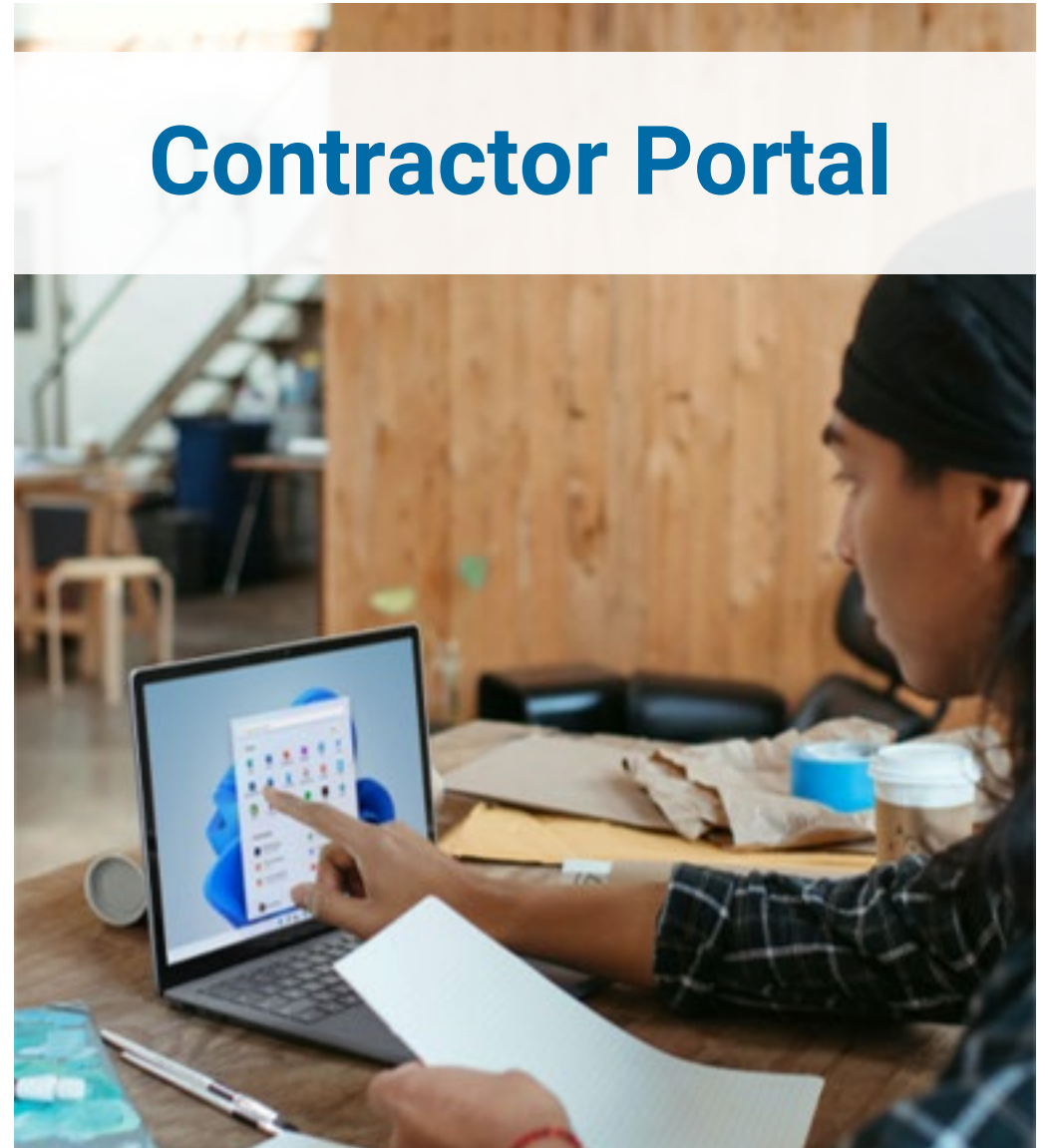
Next steps

Residential Market Engagement System

- Online and secure
- Integrated workflows
- On-demand program updates and management
- Can add more documentation
- Reporting
- Operate with excellence and harness our data

March 2023: EmPower+ and Residential Energy Assessment programs

After March: Feedback, enhancements
customer engagement



What to expect in March 2023

Contractor

Log into the portal for

- Project acceptance
- Work scope submission
- Final project submission
- Appliance requests
- Residential Energy Assessment (REA) workflow



EmPCalc & REA tool to be determined

CLEAResult / NYSERDA

- Assignments
- Work scope review
- Funding allocation
- Appliance project flow
- Project and measures management

Program Partners

Appliance Vendors

- Invoice submission

Stays the same:

- Contractor NYSERDA Partner Portal for Applications/<https://portal.nyserda.ny.gov/PortalLoginPage>
- Case Management System
- Current loan system

- SQA uses the existing system

EmPower+

We started moving to unified measures and rules,
and a combined application

EmPower

Assisted Home
Performance
with ENERGY STAR

March 2023

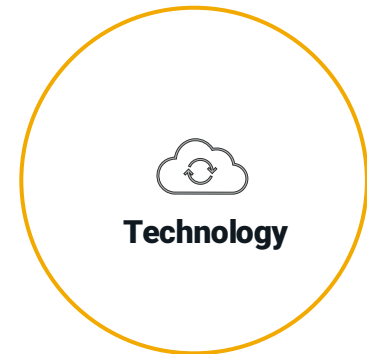
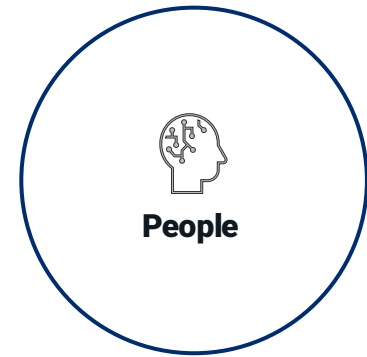
EmPower+

one application - one workflow
one Program Manual

- One workflow for low and moderate income types
- Tier 1 and Tier 3 will be used instead of EmPower and AHP

Residential Energy Assessment Program

- How the Residential Energy Assessment is used is to be determined.
- Look for more information after October.



Portal Preview

All applicant, project, and measure information in a clean format.

If a project meets all the criteria, it can go through auto-approval.

Workflow Step Summary

Program

EmPower+

Account #:

9000000086

Enrollment #:

10002915

Reference #:

10002915

Status:

Work Completed

Customer: Morgan Green

Customer Class: Residential

Premise Id: 0000000086

Premise Account(s):

Applicant

Green, Morgan

47 W 13th St

New York, NY 10011

(555) 777-7777

(555) 888-8888

Climate Zone:

County: New York

Driving Directions

Workflow Step Savings

kWh: 46.3449

Workflow Step Costs

Incentive: \$400.00

Fee Cost: \$0.00

Total Cost: \$400.00

Applicant Information

Application Information

Replacement Equipment

Usage and Fuel Information

Contractor Referral & Other Info

Documents (1)

Measures (2)

Overrides

Application History

Workflow Submission - Usage and Fuel Information - Work Completed

Save

Close

Electric Usage Information

**Annual Electric Usage

100.0000

**Electrical Panel Box Size (amps)

30

Electric Rate

0.1412

Heating Usage Information

**Is Primary Heating Fuel Usage Available?

Yes

**Annual Heating Usage

100.0000

Heating Usage Unit

Gas Rate

1.63

Delivered Fuel Information

Delivered Fuel

Unit Type

Gallon

Price Per Unit

\$0.00

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Workflow Submission - Usage and Fuel Information - New

Save

Close

Electric Usage Information

**Annual Electric Usage

Electric Rate

0

Heating Usage Information

**Is Primary Heating Fuel Usage Available?

(Click to Select)

Heating Usage Unit

(Click to Select)

Delivered Fuel Information

Delivered Fuel

(Click to Select)

Price Per Unit

\$0.00

Created by Collins, Erica on 9/27/2022 10:59

**Electrical Panel Box Size (amps)

(Click to Select)

30

40

50

60

80

100

125

150

Unit type

Drop-down menus are filtered based on selections made/data provided in other fields.

Portal Preview

Ability to upload/add many documents such as utility bills or photos into a project.

Workflow Step Summary

Program
EmPower+

Account #: 9000000086
Enrollment #: 10002915
Reference #: 10002915
Status: Pending Review

Customer: Morgan Green
Customer Class: Residential
Premise Id: 0000000086

Premise Account(s):

Applicant
Green, Morgan
47 W 13th St
New York, NY 10011
(555) 777-7777
(555) 888-8888

Climate Zone:
County: New York

[Driving Directions](#)

Workflow Step Savings
kWh: 46.3449

Workflow Step Costs
Incentive: \$400.00
Fee Cost: \$0.00
Total Cost: \$400.00

[Workflow Step Detail](#)

[Contact Attempts \(0\)](#)

[Documents \(1\)](#)

[Override](#)

Final Project Submission Workflow Step - Documents									
New Close									
	Required?	Document Type	Document Name	Source	Data Validated from Receipt?	File Size	Comments	Create Date	Created By
	!	Photos							
	!	Post Installation Measure Report							
	⚠	Change Order							
	✓	Signed Contract	Signed Contract.docx	Final Project Submission	NA	14.05 KB		9/26/2022	Collins, Erica

Portal Preview

Programs and measures
can be updated regularly.

Calculations occur in the
platform.

Portal Implementation

Workflow Step Summary

Program
EmPower+

Account #: 9000000086
Enrollment #: 10002915
Reference #: 10002915
Status: Work Completed

Customer: Morgan Green
Customer Class: Residential
Premise Id: 0000000086

Premise Account(s):

Applicant
Green, Morgan
47 W 13th St
New York, NY 10011
(555) 777-7777
(555) 888-8888

Climate Zone:
County: New York

[Driving Directions](#)

Workflow Step Savings
kWh: 46.3449

Workflow Step Costs
Incentive: \$400.00
Fee Cost: \$0.00
Total Cost: \$400.00

[Applicant Information](#)

[Application Information](#)

[Replacement Equipment](#)

[Usage and Fuel Information](#)

[Contractor Referral & Other Info](#)

[Documents \(1\)](#)

Measures (2)

Workspace Submission - Measures - Work Completed

[Process](#) [Save](#) [Close](#) [Enrollment Profile](#) [Add Measures](#) [Double Dip Report](#)

Enrollment Measures

#	Measure Name	Measure	Measure Cost	Incentive	Savings			
		Unit	P Qty	Unit Price	Amount	Unit Price	Amount	kWh
1	Dehumidifier (NY_DHMF)	Unit(s)	1	\$500.00	\$500.00	\$400.00	\$400.00	46.3449
**Type: Stand Alone								
**IEF - Integrated Energy Factor (liters/kWh): 20.0								
**Product Capacity (Pints/Day): 2.0								
Dollar Savings: \$6.54								
Energy Savings: 46.34								
**Total Dehumidifier Project Cost: \$500.00								
Alternate Funding:								
Estimated Customer Contribution: \$100.00								
**Will the Customer Contribution be overridden?: No								
2	Funding Information (NY_FUNDINFO)	Each	1			\$0.00	\$0.00	
Total Utility Funding: \$0.00								
Total WAP Funding: \$0.00								
Total 3rd Party Funding: \$0.00								
Total Customer Contribution: \$100.00								
**Will the Customer Contribution be overridden?: No								
				Measure Cost		Incentive		kWh
Grand Total				\$500.00		\$400.00		46.3449

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Phased Implementation

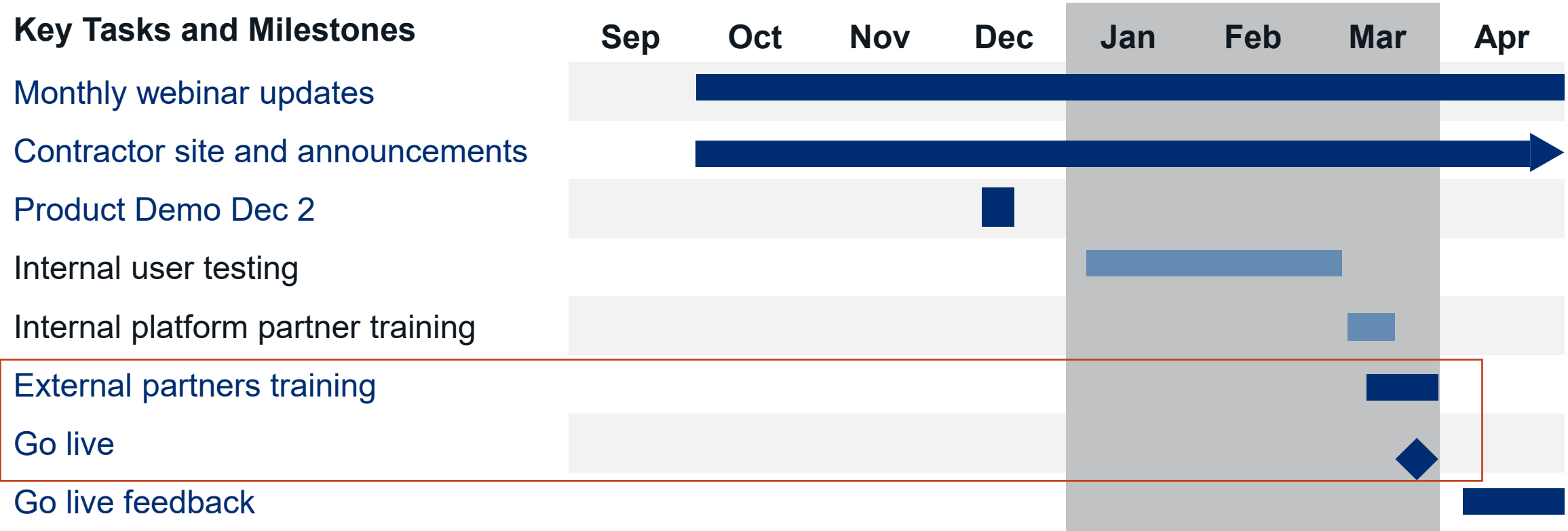
March 2023

- Online - cloud platform
- Contractor assignment and acceptance workflow
- On-demand program updates - measure library, pricing/costs, TRM savings, and eligibility
- Streamlined EmPower+ and Residential Energy Assessment program workflows
- Supports launching an appliance enrollment at any point during an EmPower+ enrollment
- Standard and customizable reporting
- Invoicing
- Measure savings and pricing/costs versioning

Future Enhancement Goals

- Single sign-on for contractors to manage all activities on all NYSERDA platforms
- Contractor dashboard / external contractor profile
- Pilot project workflow
- Data migration of historical project information after go live. More information to come.

March 2023 Portal Timeline



Be ready!

Tap into your resources

- Attend monthly Stakeholder Webinars
- Check out the Program Announcements for updates
- Complete training in March 2023
- Be ready for cutover at the end of **March 2023**

Questions about the portal implementation?

Contractors

Please reach out to your Account Manager,
Contractor Support,
or call 800-284-9069

- Monthly Webinars
- [Program Announcements](#)
- [Contractor Support site](#)
<https://hpwescontractorsupport.com/>

Questions?



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Residential Case Escalation Report



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Residential Case Escalation

>11 Total case

- 1 – Geo Eligible approval concern
- 3 – Project completion concern
- 3 – Multifamily project rule questions
- 1 – EmPCalc calculation concern regarding ACH
- 1 – Referral question
- 1 – Contractor requesting their contract information to be changed
- 1 – Project submission concern

Project Completion Timelines



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Project Completion Timelines

Starting January 1, 2023, the Program will reinstate the 120-day project completion goal. Please review the following dates for Project completion submission:

- Projects started **before** January 1, 2022, will need to be completed by January 1, 2023.
- Projects started **before** January 1, 2023, will need to be completed by May 1, 2023.
- Projects started **after** January 1, 2023, should be completed within the 120-day period used in the past.

We understand that there may be instances where a project cannot be completed within the timeframes referenced above. Contractors should document in the project notes in Uplight if a project can't be completed within the timeframe and reach out to their Account Manager to coordinate an extension.

Appliance Delivery



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Appliance Volumes and Expectations Update

Appliance orders in the Program have increased over the last several months. We are experiencing delays in delivery times across several reasons for the following reasons:

- Increased approved appliance volume
- Supply chain issues
- Additional vendor participation

Due to the delays in obtaining supply and vendors being able to schedule deliveries with customers, we are recommending delivery timing expectations based on regions. Our recommendation, if you are serving a customer in these locations, is to set realistic expectations for them on when they can expect the delivery of their appliance, if approved through the program.

Appliance Volumes and Expectations

Region	Volume	Delivery Timing Expectation (avg)
Mid-Hudson	843	60-90 days (2-3 months)
NYC	338	60-90 days (2-3 months)
Capital Region	175	60-90 days (2-3 months)
Mohawk Valley	115	60-90 days (2-3 months)
Finger Lakes	163	60-90 days (2-3 months)
Central NY	101	60-90 days (2-3 months)
Southern Tier	64	30-60 days (1-2 months)
North Country	26	30-60 days (1-2 months)
Western NY	147	60-90 days (2-3 months)
Long Island	22	60-90 days (2-3 months)
TOTAL	1,994	