

# Single Family Residential Program Update

Scott Oliver, Program Manager  
David Friello, Senior Project Manager

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

**November 4, 2022**

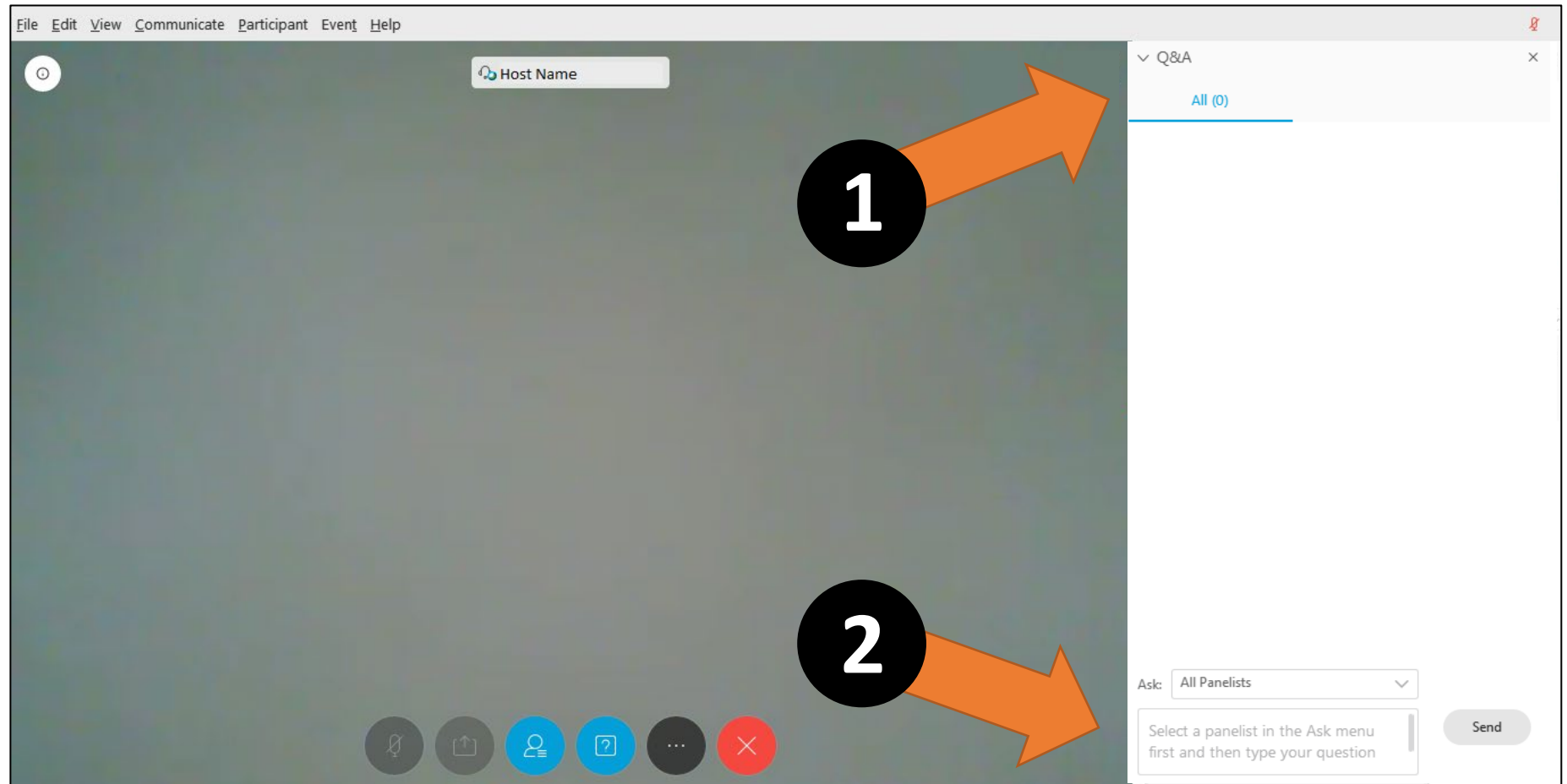


**NYSERDA**

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

## OPTION 1 - TEXT

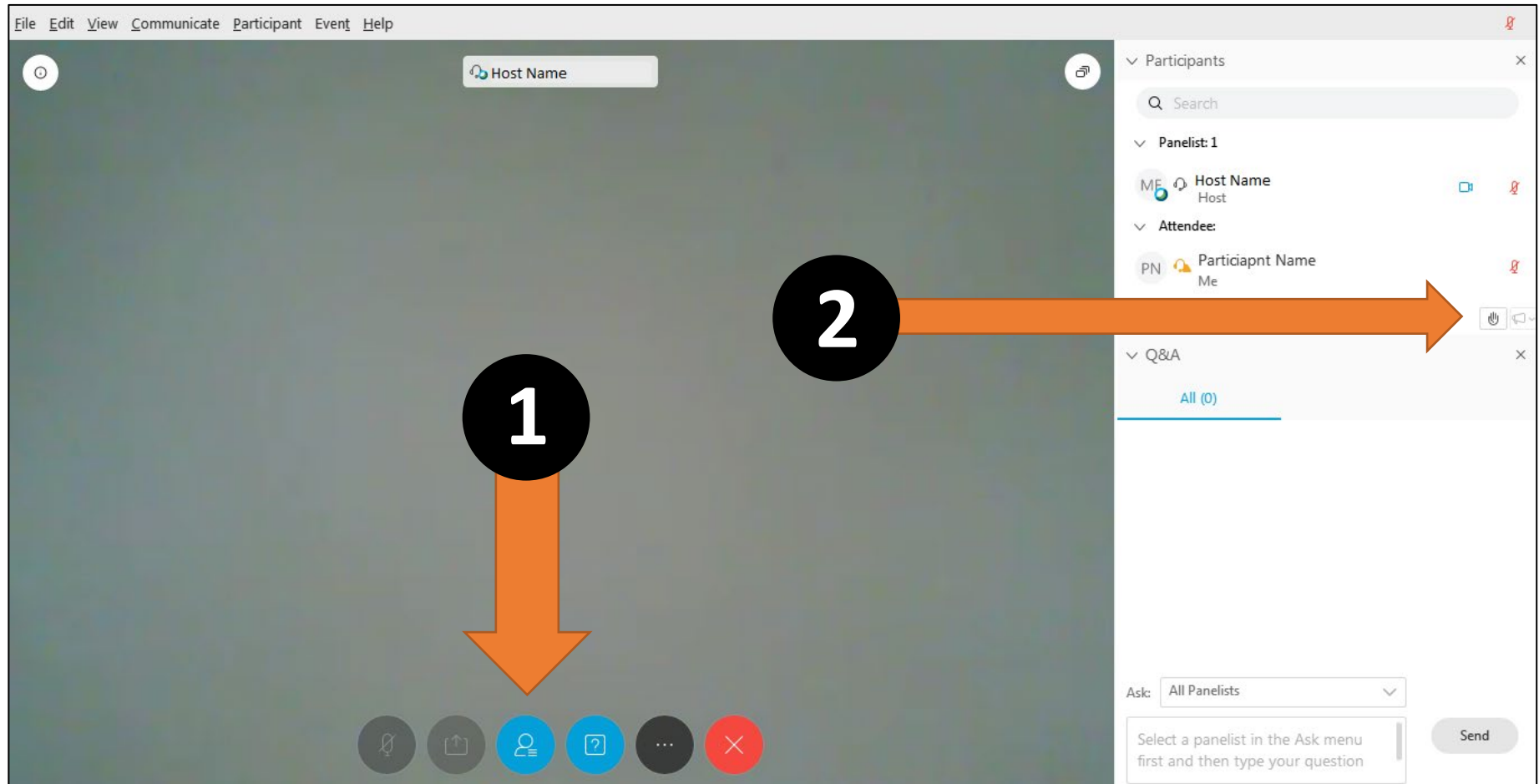
- > Locate the Q&A function in the upper right portion of your webinar panel.
- > Click on the small arrow to the left of "Q&A" to expand the text field.
- > Type your question into the text field and click "send."



# 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

1. Contractor Portal RMES Update
2. IRA updates- Courtney Moriarta
3. Heat Pump Planner/ Clean Heat Connect- Michael Courtney
4. Rental Property Rules Clarifications- Pete Hoke
5. Res Cases escalation monthly update- Matt Houle



NYSERDA

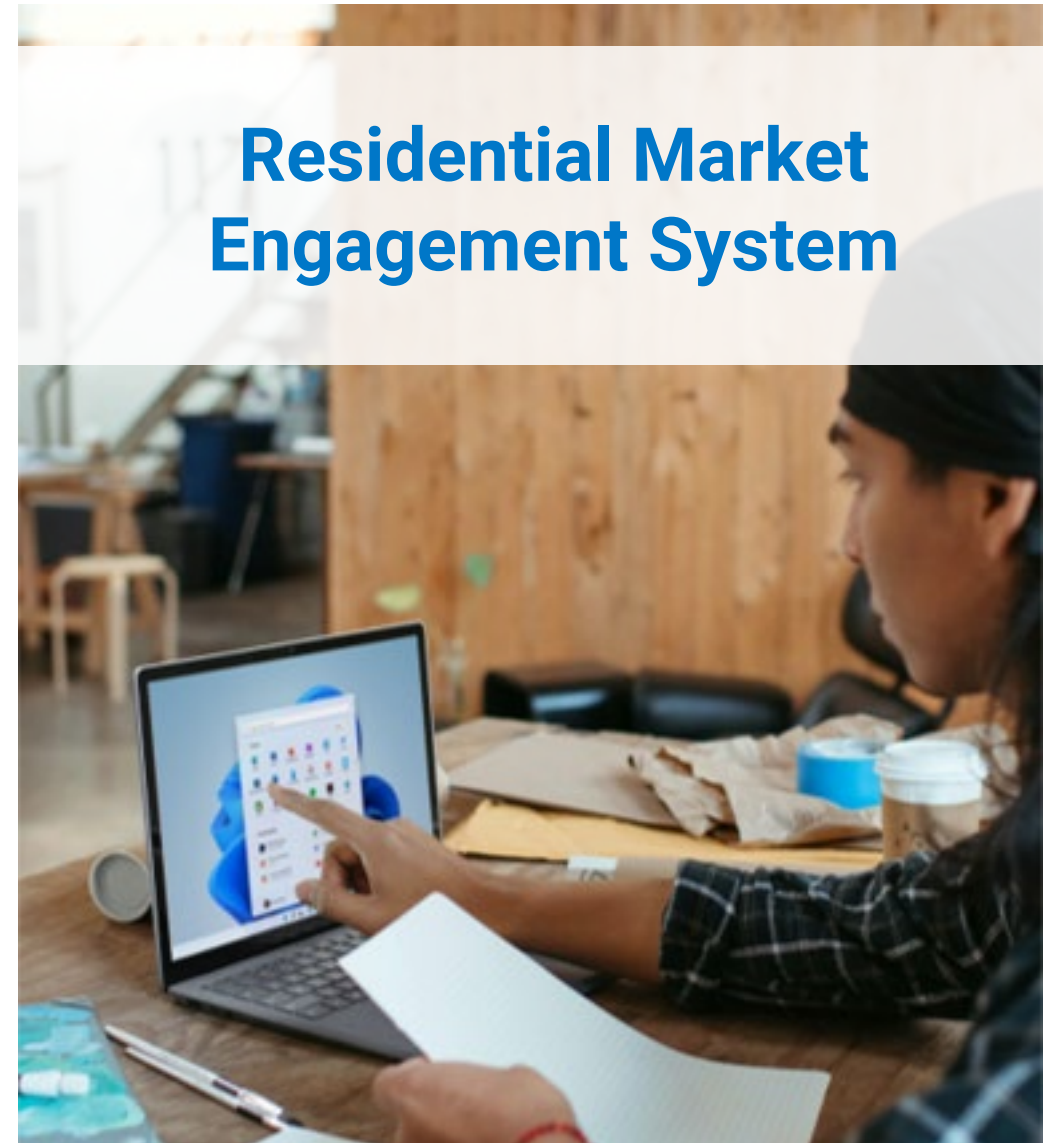
# Contractor Portal RMES Updates



NYSERDA

# Contractor Portal RMES Update

- On track to cutover to the new portal in March 2023
- Online, improved management of energy programs and measures
- Join us for a platform demonstration during the December 2<sup>nd</sup> webinar
- If you missed the Contractor Portal/RMES overview - Review the [October 7 Single Family Program Update](#) recording for an overview of the Contractor Portal/RMES.



# IRA Updates

**Courtney Moriarta**  
**Program Director**  
**Single Family Residential**



**NYSERDA**

# Heat Pump Planner/ Clean Heat Connect



NYSERDA



# Heat Pump Planner Digital Interactive Website



**NYSERDA**

# What is the Heat Pump Planner?

## > Evaluation guide for consumers

- Provides customers that are considering heat pumps a mechanism to explore different systems before buying – think of it like “test driving” different car models

Awareness & Familiarity

Interest

Consideration

Intent to Purchase

- Educates customers on basics of residential heat pump options
- Provides overview of system benefits based on home type
- Gives customers a sense of system installation and operating costs

## > Sales tool for heat pump contractors

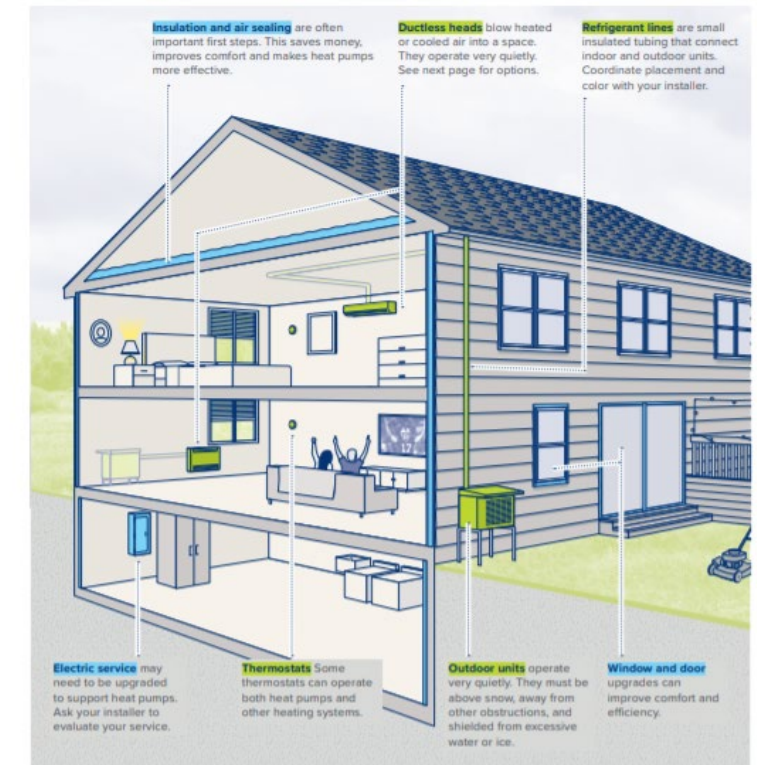
- Reduces education time during sales visits
- Provides homeowners a visual of what it would look like

## > Developed with input from consumer focus groups and subject matter experts (SMEs)

### Ductless Heat Pumps for a Two-Story Home

Heat Pumps use electricity to provide heating and cooling.

- **New technology** reliably heats homes all winter across New York State
- **Healthier and safer** with no fuels, no carbon monoxide and no window air conditioners
- **One system** for efficient heating and cooling
- **Rebates** for installation and **lower heating costs** for many consumers
- **Green** with low greenhouse gas emissions
- For **new or existing** homes

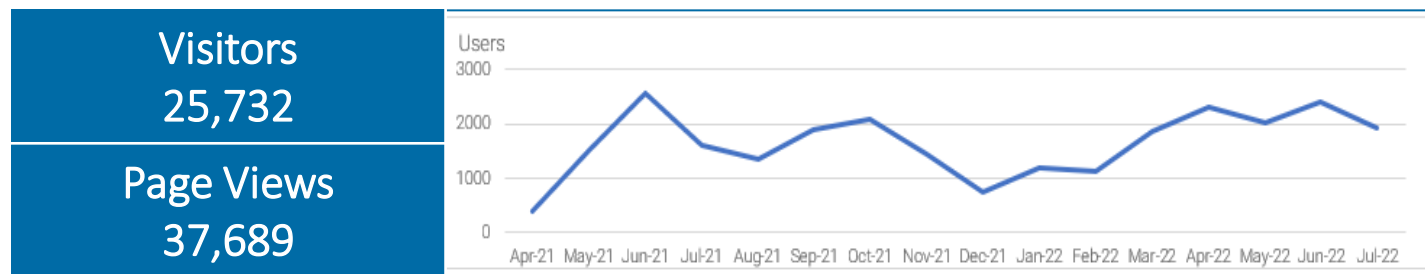


GUIDE TO HEAT PUMPS SERIES

MORE ABOUT DUCTLESS HEAT PUMPS >

# Engagement with Static PDF version

## Visits to the Webpage



## Traffic Source

|                          |                        |
|--------------------------|------------------------|
| NYS Clean Heat<br>22,733 | National Grid<br>1,260 |
| Google<br>1,084          | CHC Communities<br>152 |
| NYSEG<br>104             | NYSERDA<br>142         |

832  
visitors clicked to  
“Find a Contractor”

## PDF Downloads

| Event Label        | Users  | Unique Events<br>(# times opened) |
|--------------------|--------|-----------------------------------|
| 2 Story Ducted     | 4,343  | 4,484                             |
| 2 Story Multizone  | 3,754  | 3,838                             |
| 2 Story Ductless   | 2,944  | 2,977                             |
| 1 Story Ducted     | 1,961  | 2,019                             |
| 1 Story Ductless   | 1,497  | 1,538                             |
| 2 Story GSHP       | 1,380  | 1,406                             |
| Full Planner       | 1,395  | 1,428                             |
| 1 Story Multizone  | 799    | 802                               |
| Introduction Page  | 617    | 617                               |
| 1 Story GSHP       | 633    | 656                               |
| MFG Ducted         | 474    | 623                               |
| MFG Ductless       | 416    | 427                               |
| Townhome Multizone | 311    | 319                               |
| Flat Ductless      | 267    | 275                               |
| Total              | 20,791 | 21,409                            |

# Engagement Plans for Interactive Planner

## **NYS Clean Heat Retargeting Strategy**

Target previous [cleanheat.ny.gov](https://cleanheat.ny.gov) visitors with messaging encouraging them to revisit the site by promoting specific opportunities to learn or take action, like exploring the heat pump planner.

## **Customer Journey Enhancements**

Planner is now part of [cleanheat.ny.gov](https://cleanheat.ny.gov) keeping consumers directly on-site.

Guided path leading consumers to the most likely heat pump systems for their situation. Reaffirming information and recommendations they've been exposed to from their contractor.

Clearly highlighted hot spot callouts focused on the key benefits and important considerations.

## **Measurability**

Journey contained within the website allowing us an easier way to measure and optimize as needed.

# CleanHeat.ny.gov/planner



NYS Clean Heat

LEARN ABOUT HEAT PUMPS

REBATES & FINANCING

FIND A CONTRACTOR ▶

Change Language



## Heat Pump Planner

Need help determining the heat pump system that might be best for your home? By answering a few questions about your home, our Heat Pump Planner tool will help you learn more about the types of heat pump technology available, compare your options, help you understand installation and operating costs, and prepare you with questions to ask your installer.

GET STARTED ▶

[Are you a contractor? See all heat pump plans here. »](#)





# For Contractors

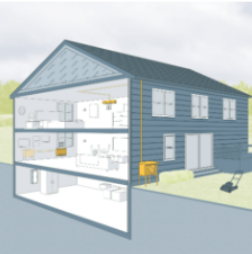
## All plans

### Heat Pump Options

This page shows the common heat pump options. Select one of the options below to learn more, and remember to always work with a participating NYS Clean Heat contractor before making any final purchase decisions. Your contractor is the expert and will help you design a heat pump system best for your home.

[FILTER RESULTS ▶](#)[DOWNLOAD THE FULL PLANNER \(PDF\)](#)

#### Ductless Mini-Split System Two-Story Home



Often the simplest, least expensive heat pump system to install with many design options to choose from. Zoned temperature control allows you to safely and sustainably maximize your comfort.

[EXPLORE THIS OPTION ▶](#)

#### Ground Source (Geothermal) System Two-Story Home



The most efficient and longest lasting heat pump option. Most homeowners find that the energy savings they achieve offsets the higher installation cost in the long run.

[EXPLORE THIS OPTION ▶](#)

#### Central Air Source System With Optional Mini-Splits Two-Story Home



Using existing ductwork can mean less work and a lower installation cost. You can optionally add ductless heads for even greater zoned temperature control.

[EXPLORE THIS OPTION ▶](#)

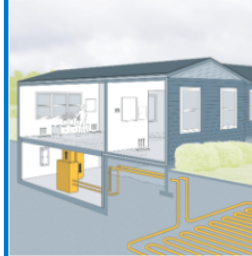
#### Ductless Mini-Split System Single-Story Home



Often the simplest, least expensive heat pump system to install with many design options to choose from. Zoned temperature control allows you to safely and sustainably maximize your comfort.

[EXPLORE THIS OPTION ▶](#)

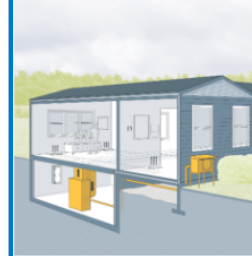
#### Ground Source (Geothermal) System Single-Story Home



The most efficient and longest lasting heat pump option. Most homeowners find that the energy savings they achieve offsets the higher installation cost in the long run.

[EXPLORE THIS OPTION ▶](#)

#### Central Air Source System With Optional Mini-Splits Single-Story Home



Using existing ductwork can mean less work and a lower installation cost. You can optionally add ductless heads for even greater zoned temperature control.

[EXPLORE THIS OPTION ▶](#)

#### Central Air Source System Manufactured Home



Using existing ductwork can mean less work and a lower installation cost.

[EXPLORE THIS OPTION ▶](#)

#### Ductless Mini-Split System Manufactured Home



Often the simplest, least expensive heat pump to install with many options to work for your space. Zoned temperature control allows you to safely and sustainably maximize your comfort.

[EXPLORE THIS OPTION ▶](#)

#### Central Air Source System With Optional Mini-Splits Townhome



Using existing ductwork can mean less work and a lower installation cost. You can optionally add ductless heads for even greater zoned temperature control.

[EXPLORE THIS OPTION ▶](#)

#### Ductless Mini-Split System Apartment




Often the simplest, least expensive heat pump to install with many options to work for your space. Zoned temperature control allows you to safely and sustainably maximize your comfort.


[EXPLORE THIS OPTION ▶](#)


# For Customers Quiz

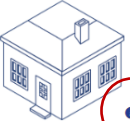
**What is your home type?**


Question 1 of 3

  
☐ Apartment

  
☐ Townhome

  
☐ Manufactured

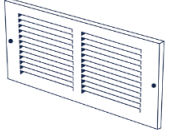
  
☐ Single-Story

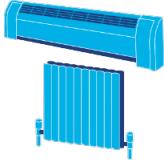
  
☒ Two-Story


[NEXT](#)


**How is heat delivered throughout your home?**

Question 2 of 3

  
☐ Hot Air/Vents

  
☒ Radiators


  
☐ Electric Baseboard Heaters


  
☐ I'm not sure


[BACK](#) [NEXT](#)

**Are you looking for a whole-home solution or a partial-home solution (e.g. an addition)?**

Question 3 of 3

  
☒ Whole-Home

  
☐ Partial-Home

  
☐ I'm not sure

[BACK](#) [START OVER](#) [COMPARE HEAT PUMP OPTIONS](#)

Customers are provided descriptions for assistance if needed.

# For Customers

# Compare Options Page

## Heat Pump Options

Based on the answers you provided, we've found the common heat pump option(s) that may be a good fit for your home. Select an option below to learn more and remember to always work with a participating NYS Clean Heat contractor before making any final purchase decisions. Your contractor is the expert and will help you design the best heat pump system for your home.

We found **2 result(s)** based on your specifications:

Two-Story Home

⬆

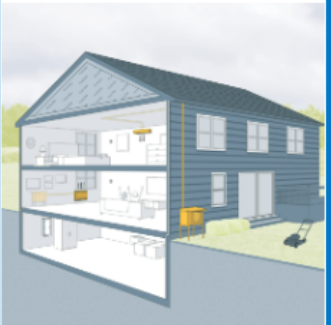
Radiators

⬆

Whole Home

⬆


### Ductless Mini-Split System



Often the simplest, least expensive heat pump system to install with many design options to choose from. Zoned temperature control allows you to safely and sustainably maximize your comfort.

EXPLORE THIS OPTION ▶

### Central Air Source System With Optional Mini-Splits



Using existing ductwork can mean less work and a lower installation cost. You can optionally add ductless heads for even greater zoned temperature control.

EXPLORE THIS OPTION ▶




# Heat Pump Plan – Interactive Schematic

Hot spot beacons highlight benefits and key considerations.

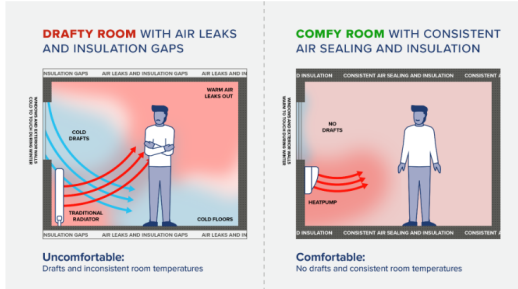
When the hot spot is opened deeper rich-media content is presented – i.e. videos, illustrations, photography

**Zoned Temperature Control**



With a central air source heat pump, you can individually control the temperatures of different zones throughout your home using air handlers in your ductwork. That means you can solve common comfort

**Pro Tip: Eliminate Drafts with Insulation and Air Sealing**



**DRAFTY ROOM WITH AIR LEAKS AND INSULATION GAPS**

**COMFY ROOM WITH CONSISTENT AIR SEALING AND INSULATION**

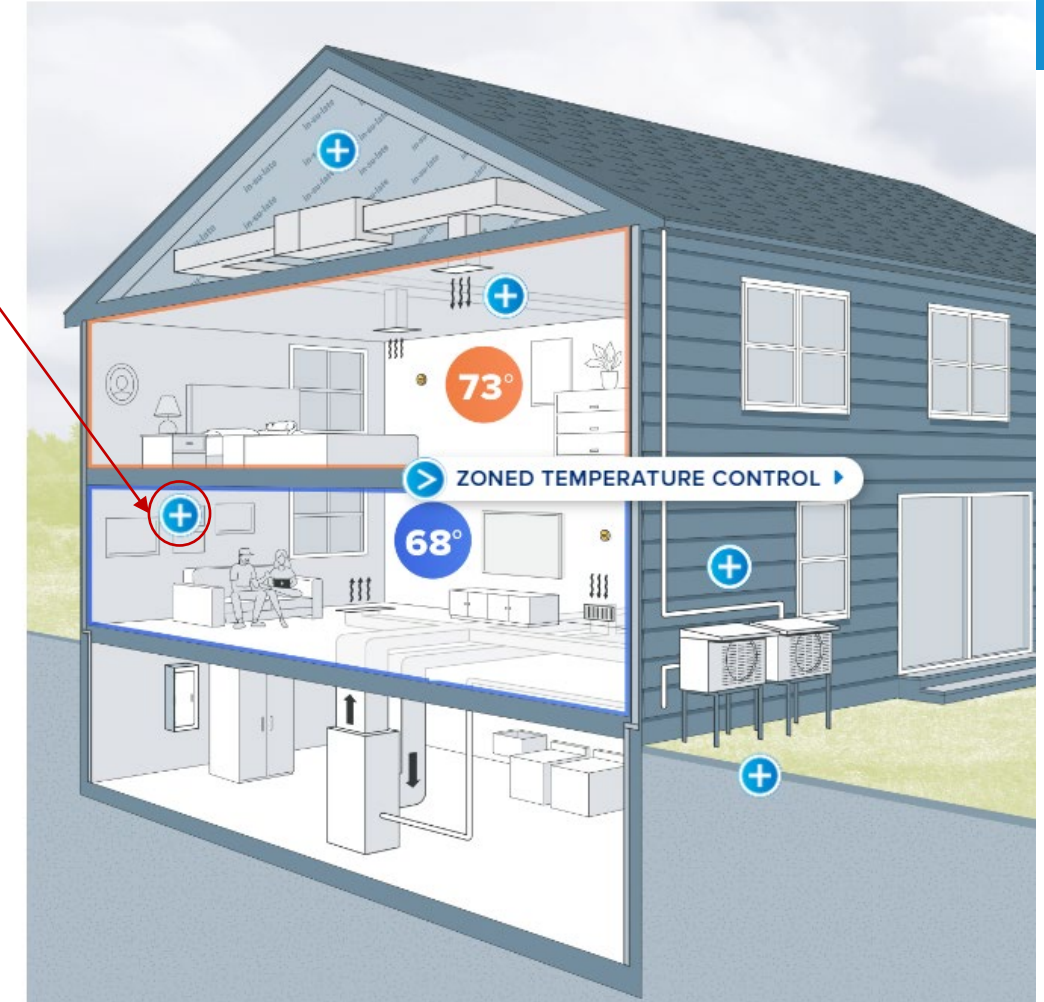
**Uncomfortable:** Drafts and inconsistent room temperatures

**Comfortable:** No drafts and consistent room temperatures

Just like with any HVAC system, you'll get the most out of this state-of-the-art technology by first addressing any areas in your home that may need to be sealed and insulated. To make your home as comfortable and efficient as can be, we recommend working with your qualified contractor to have a

## Central Air Source Heat Pump for a Two-Story Home With Optional Mini-Splits

Click on the 'hot spots' in the interactive image below to learn more about your home's recommended heat pump plan with videos, photos, and more. Then, scroll down to view [benefits](#), [key considerations](#), [cost information](#), and [questions for your contractor](#).

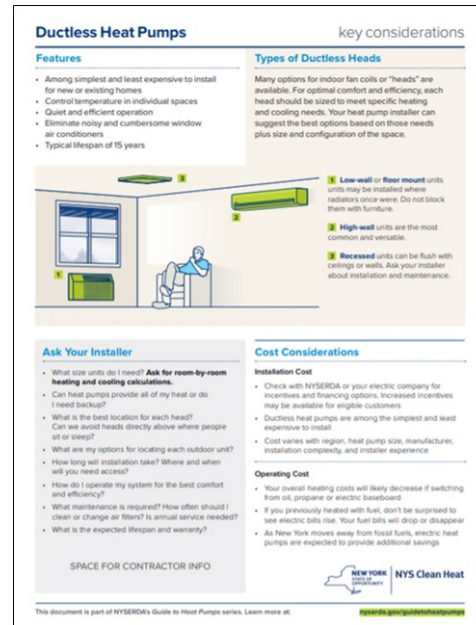


← SEARCH AGAIN

VIEW TECHNICAL PDF

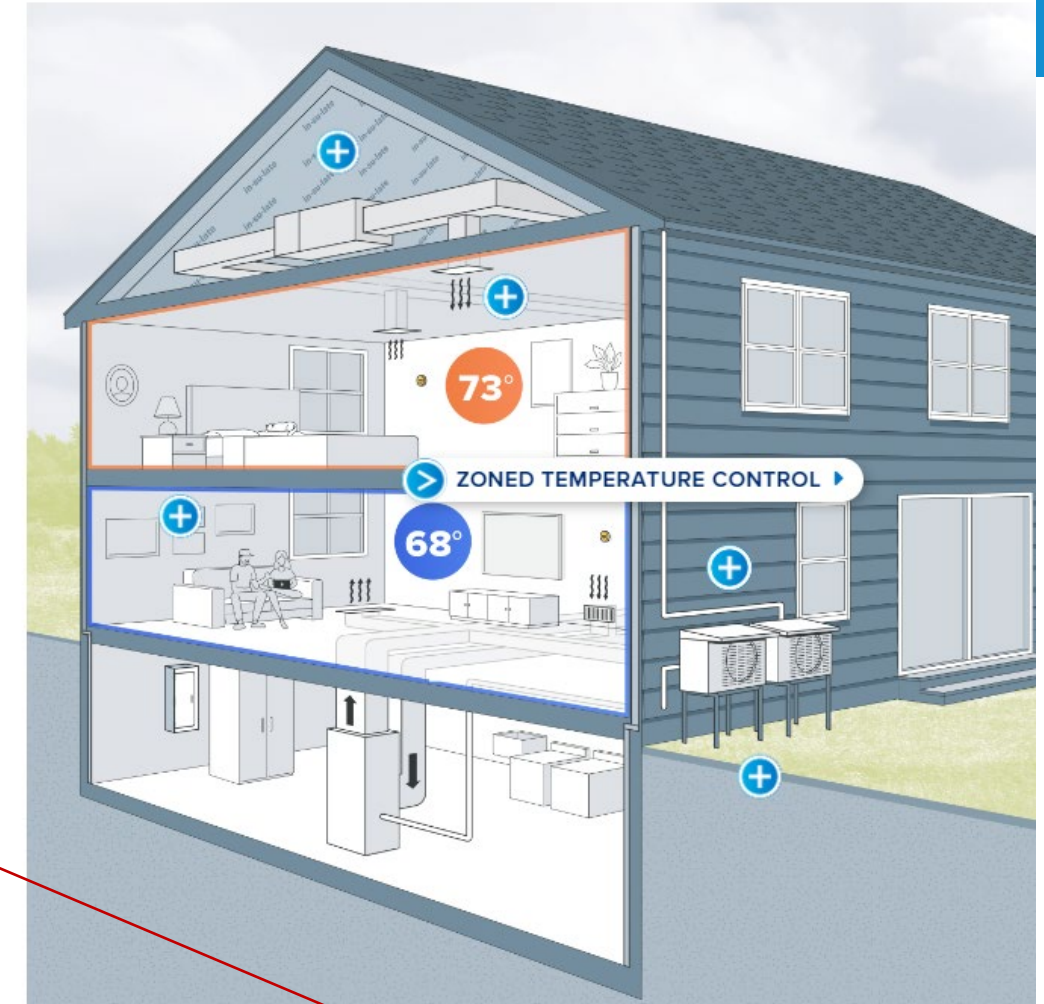
FIND A CONTRACTOR

# Heat Pump Plan – PDF Versions



## Central Air Source Heat Pump for a Two-Story Home With Optional Mini-Splits

Click on the 'hot spots' in the interactive image below to learn more about your home's recommended heat pump plan with videos, photos, and more. Then, scroll down to view [benefits](#), [key considerations](#), [cost information](#), and [questions for your contractor](#).



Original static pdf versions are available by clicking the “View Technical PDF” button.

When the hot spot is opened deeper rich-media content is presented – i.e. videos, illustrations, photography

SEARCH AGAIN

VIEW TECHNICAL PDF

FIND A CONTRACTOR

# For Customers

## Benefits, Key Considerations, Dollars & Sense, Ask Your Installer

BENEFITS

KEY CONSIDERATIONS

DOLLARS AND SENSE

ASK YOUR INSTALLER

Cold-climate air source heat pumps use electricity to provide 2-in-1 heating and cooling that is safe, sustainable, and versatile.



**Comfort**

Cold-climate heat pumps distribute gentle, steady streams of warm (or cool) air to keep you comfortable — even on the hottest summer days and the coldest winter nights.



**Lower Energy Bills**

The monthly cost of heating and cooling your home with a heat pump is typically less than oil, propane, or electric resistance heating (such as baseboards).



**Temperature Control**

Zoned heating and cooling allows you to set different areas of your home to different temperatures. With the option to add ductless "heads" to your central air source system, you can achieve even greater zoned temperature control.



**High Efficiency**

Sustainable heating and cooling that is up to 3x more efficient than traditional fuel systems.



**Convenient**

Heat pumps require less maintenance, fewer service calls, and no fuel deliveries.



**Installation Rebates**

You may qualify for incentives from your electric utility company to lower your costs.



**Safety and Peace of Mind**

No more flames or fumes. Heat pumps can improve your home's indoor air quality and reduce your risk of carbon monoxide poisoning by not burning fossil fuels.



**Cleaner and Greener**

Not only are heat pumps good for your wallet, they are good for the planet too. Heat pumps use electricity to heat and cool your home, reducing your carbon footprint when compared to a system that services you to

# For Customers

## Benefits, Key Considerations, Dollars & Sense, Ask Your Installer

**BENEFITS**

**KEY CONSIDERATIONS**

**DOLLARS AND SENSE**

**ASK YOUR INSTALLER**

- Central air source heat pump systems give you the option to incorporate ductless heads into your design to create custom comfort zones or to heat and cool areas of your home that are not well served by your existing ductwork.
- A central air source heat pump system can replace your current central AC in its entirety.
- Your electric service may need to be upgraded to support your new heat pump.
- To get the most comfort and efficiency from your system, use the time between ordering your system and installation to improve your home's insulation and air sealing.
- Central air source heat pump systems provide great design flexibility by taking advantage of existing ductwork, but some ducts may need to be air sealed, insulated, and/or re-sized to maximize their efficiency.

**FIND A CONTRACTOR**



# For Customers

## Benefits, Key Considerations, Dollars & Sense, Ask Your Installer

### BENEFITS

### KEY CONSIDERATIONS

### DOLLARS AND SENSE

### ASK YOUR INSTALLER

#### Installation Cost:

*Cost may vary by region, installation complexity, installer experience, system size, efficiency, and manufacturer.*

- Rebates are available when you work with a participating New York State Clean Heat contractor — [check to see what you may qualify for](#).
- New York State has low-interest [financing options](#) available to help make the purchase and installation of a heat pump more affordable.
- Central air source heat pump systems take advantage of your existing ductwork, which could mean less work for you and your contractor.
- Since each zone creates an additional cost, using fewer zones can make for a lower cost installation when practical. If you choose to incorporate ductless heads into your central air source heat pump design, each additional ductless unit may add to the project cost as well.

#### Operating Cost:

- Your overall heating costs will likely decrease if switching from oil, propane, or electric resistance heating (such as baseboards).
- If you previously heated with fuel, don't be surprised to see electric bills increase. However, your fuel bills will drop or disappear, which may offset the increase to your electric bills.
- Air source heat pumps are more efficient than other air conditioning systems, saving you more money during the summer.
- As is the case with any heating system, efficient homes that have been professionally air sealed and insulated have much lower operating costs.
- Air source heat pumps last about 15 years and require minimal maintenance.

# For Customers

## Benefits, Key Considerations, Dollars & Sense, Ask Your Installer

### BENEFITS

### KEY CONSIDERATIONS

### DOLLARS AND SENSE

### ASK YOUR INSTALLER

- What size units do I need? Ask for room-by-room heating and cooling calculations.
- Can the heat pump you are recommending sufficiently heat my home, or is an additional system needed?
- Is the heat pump you are recommending on the Northeast Energy Efficiency Partnership ([NEEP](#)) [cold-climate product list](#)? Note: It is reasonable to ask your installer for a copy of the spec sheet from the NEEP website.
- What mix of ducted air handlers and ductless “heads” will work best in my home?
- What are my best placement options for the outdoor unit(s)?
- How long will installation take? Where and when will you need access?
- Will I need to update my electric service?
- How do I operate my system for optimal comfort and efficiency?
- What maintenance is required? How often should I clean or change air filters? Is annual service needed?
- What is the expected lifespan and warranty?
- How can I make any additional upgrades to my home, such as adding insulation or air sealing, to prepare for a heat pump? Do you have an insulation contractor I can work with?

Find an expert to help with your residential heat pump project. Incentives may be available from your electric utility company when you work through a [NYS Clean Heat participating contractor](#).

# Rental Property Rule Clarifications



NYSERDA

# Service to 1-4 Unit Rental Properties (1 of 4)

Program Manual Section 5.19

| Unit Eligibility                             | Income Qualification | Submission of Combined Residential Application Needed for Units<br><i>Landlord (LL) occupied properties still require 50% rule to be met for additional incentives.</i> | Direct Install (DI) Eligibility based on Unit Income<br><i>Separate applications &amp; projects are required for any unit receiving DI measures</i> | Program Incentives <sup>2</sup> & Caps  | Landlord Contribution |
|--|----------------------|---|---|---|-----------------------|
| Less than 50%<br><i>e.g., 1 of 3, 1 of 4</i> | Tier 1               | Separate Application required for each qualified unit being served through the Program (and signed by the customer).  | Tier 1: Yes<br>Tier 3: Yes<br>Market Rate: No   | Single Family: \$10k<br>2-4 Unit: \$10k 1st unit, \$5k/additional unit<br>Heating Appliances: Eligible and capped (1 Unit - \$4k, 2-4 - \$8k)   | 100% over cap         |
|  | Tier 3               |   |   | Single Family: \$5k<br>2-4 Unit: \$5k 1st unit, \$2,500k/additional unit<br>Heating Appliances: Eligible and capped (1 Unit - \$2k, 2-4 - \$4k) |                       |
|  | HEAP/OTDA            | ARPA/OTDA funding may only be used on units for those that qualify for that funding.  | Tier 1: Yes<br>Tier 3: Yes (Non-HEAP/OTDA Funds)<br>Market Rate: No   | ARPA/OTDA <sup>1</sup> units: \$20k per eligible unit<br>All other units: \$5k/additional unit  |                       |

1. ARPA/OTDA funding may only be used for measures directly benefitting the qualified unit.  
2. In No Heat situations, rental properties must be owner occupied and income qualified to be eligible for additional incentives as indicated in Section 5.9 No Heat Guidelines.



# Service to 1-4 Unit Rental Properties (2 of 4)

## Program Manual Section 5.19

| Unit Eligibility  | Income Qualification | Submission of Combined Residential Application Needed for Units<br><i>Landlord (LL) occupied properties still require 50% rule to be met for additional incentives.</i>  | Direct Install (DI) Eligibility based on Unit Income<br><i>Separate applications &amp; projects are required for any unit receiving DI measures</i> | Program Incentives <sup>2</sup> & Caps  | Landlord Contribution |
|---|----------------------|--|---|---|-----------------------|
| <b>50% or more</b><br><br><i>e.g., 1 of 2, 2/3 of 3, 2/3/4 of 4</i><br><br><i>If a 3 or 4 unit building has 1 unit that qualifies for Tier 1 AND Tier 3, the whole building would qualify for Tier 3.</i> | Tier 1               | <b>Separate Applications required for all units in building (and signed by the customer).</b><br><br><i>Each Application will have an Audit/DI project created in Uplight. One of the projects (in an eligible LL or tenant's name) will also include all of the building's measures.</i><br><br><b>Contractors need to indicate on Application (step 2 of Wizard) which applications are connected so that proper income verification can be completed for that building.</b> | Tier 1: Yes<br>Tier 3: Yes<br>Market Rate: Yes  | Single Family: \$10k<br>2-4 Unit: \$10k 1st unit, \$5k/additional unit<br>Heating Appliances: Eligible and capped (1 Unit - \$4k, 2-4 - \$8k)   | 100% over cap         |
|   | Tier 3               |  |   | Single Family: \$5k<br>2-4 Unit: \$5k 1st unit, \$2,500k/additional unit<br>Heating Appliances: Eligible and capped (1 Unit - \$2k, 2-4 - \$4k) |                       |
|   | HEAP/OTDA            |  | Tier 1: Yes<br>Tier 3: Yes (Non-HEAP/OTDA Funds)<br>Market Rate: No   | ARPA/OTDA <sup>1</sup> units: \$20k per eligible unit<br>All other units: \$5k/additional unit  |                       |

1. ARPA/OTDA funding may only be used for measures directly benefitting the qualified unit.

2. In No Heat situations, rental properties must be owner occupied and income qualified to be eligible for additional incentives as indicated in Section 5.9 No Heat Guidelines.

# Service to 1-4 Unit Rental Properties (3 of 4)

[Program Manual Section 5.19](#)

## **Less than 50%**

- **Separate Applications required for each qualified unit being served through the Program (and signed by the customer).**

## **50% or more**

- **Separate Applications required for all units in building (and signed by the customer).**
- **Each Application will have an Audit/DI project created in Uplight. One of the projects (in an eligible LL or tenant's name) will also include all of the building's measures.**

**Contractors need to indicate on Application (step 2 of Wizard) which applications are connected so that proper income verification can be completed for that building. If the information is not provided it won't be reviewed as such and could be placed On Hold as additional information is requested.**

# Service to 1-4 Unit Rental Properties (4 of 4)

## Program Manual Section 5.19

### ARPA/OTDA Funding

- **May only be used on units for those that qualify for that funding.**

#### **Example:**

- **3-unit dwelling with 1 ARPA/OTDA unit + 2 EmPower only units**
- **Max incentive \$20k + \$5k + \$5k = \$30k**
- **If one of the EmPower only units needed a new water heater and/or heating system, none of the \$20k of ARPA funding could be used because it would not be benefitting the ARPA unit.**
- **However, the ARPA funding could be used towards attic and sidewall insulation because the ARPA unit would be benefitting from those measures.**

### No Heat Situations

- **Rental properties must be owner occupied and income qualified to be eligible for additional incentives as indicated in [Section 5.9 - No Heat Guidelines](#).**
- **If they don't qualify for the additional incentives, the normal program incentive levels are used.**

# Escalation Cases



NYSERDA



# Escalation Cases

## **12 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
- 1 – Contractor request change of territory

# Questions?



NYSERDA