

Single Family Residential Program Update

Scott Oliver, Program Manager
David Friello, Senior Project Manager

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

April 7, 2023

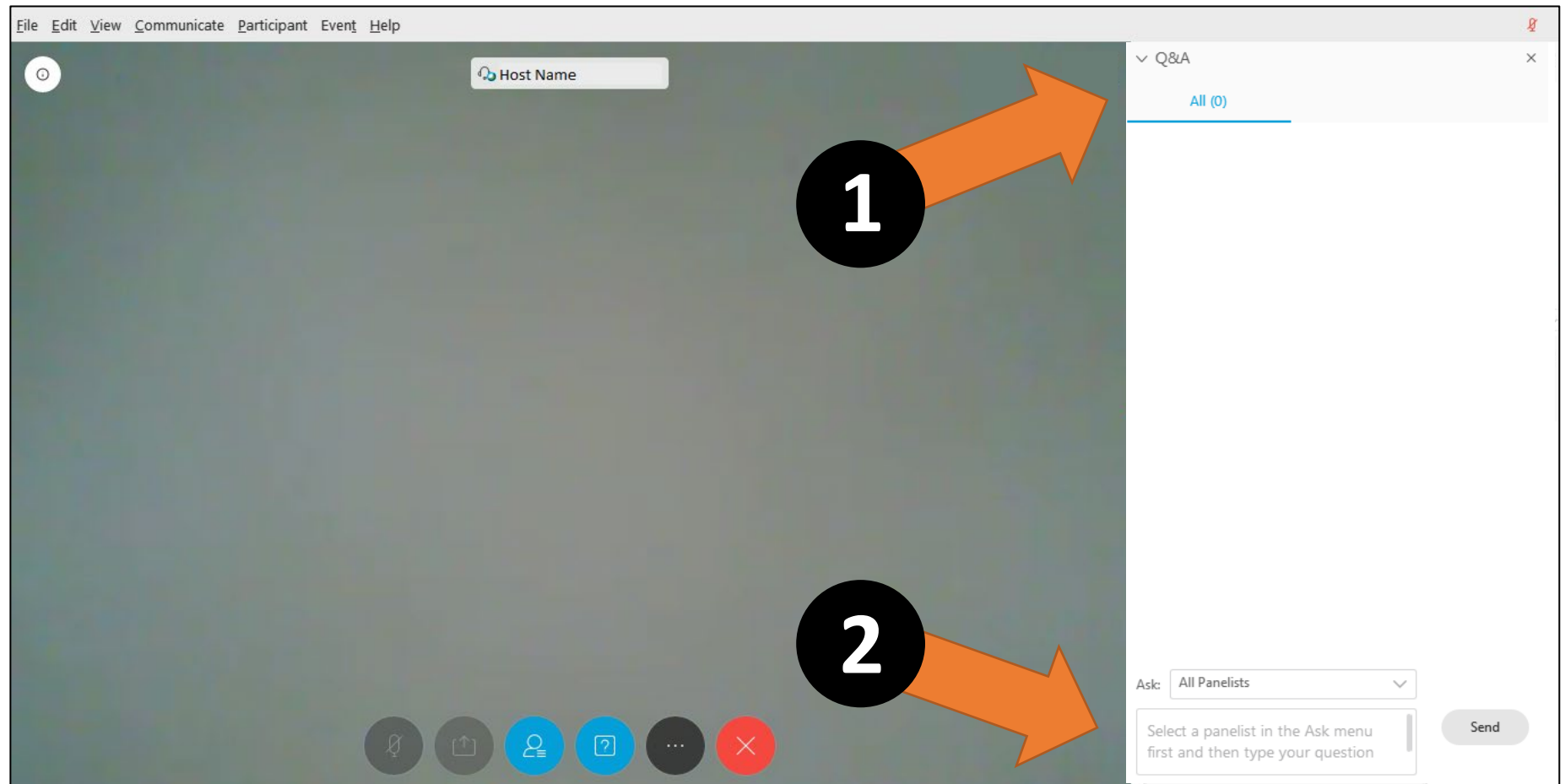


NYSERDA

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

OPTION 1 - TEXT

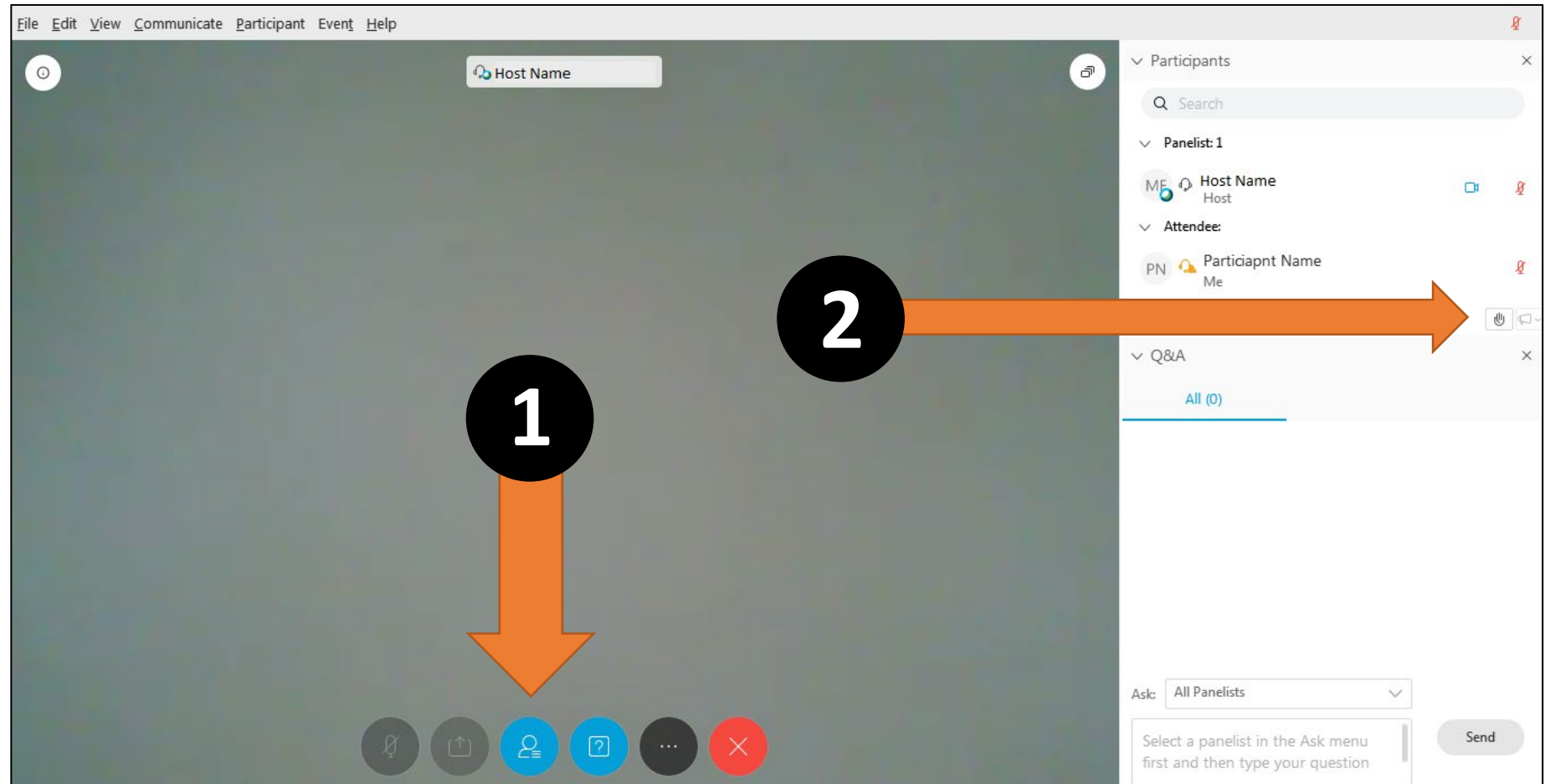
- > Locate the Q&A function in the upper right portion of your webinar panel.
- > Click on the small arrow to the left of "Q&A" to expand the text field.
- > Type your question into the text field and click "send."



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. NYHEP timeline update
2. EmPower+ Update
3. National Grid/NYSERDA training opportunity
4. New Training Videos in Knowledge Base



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NYHEP Timeline Update

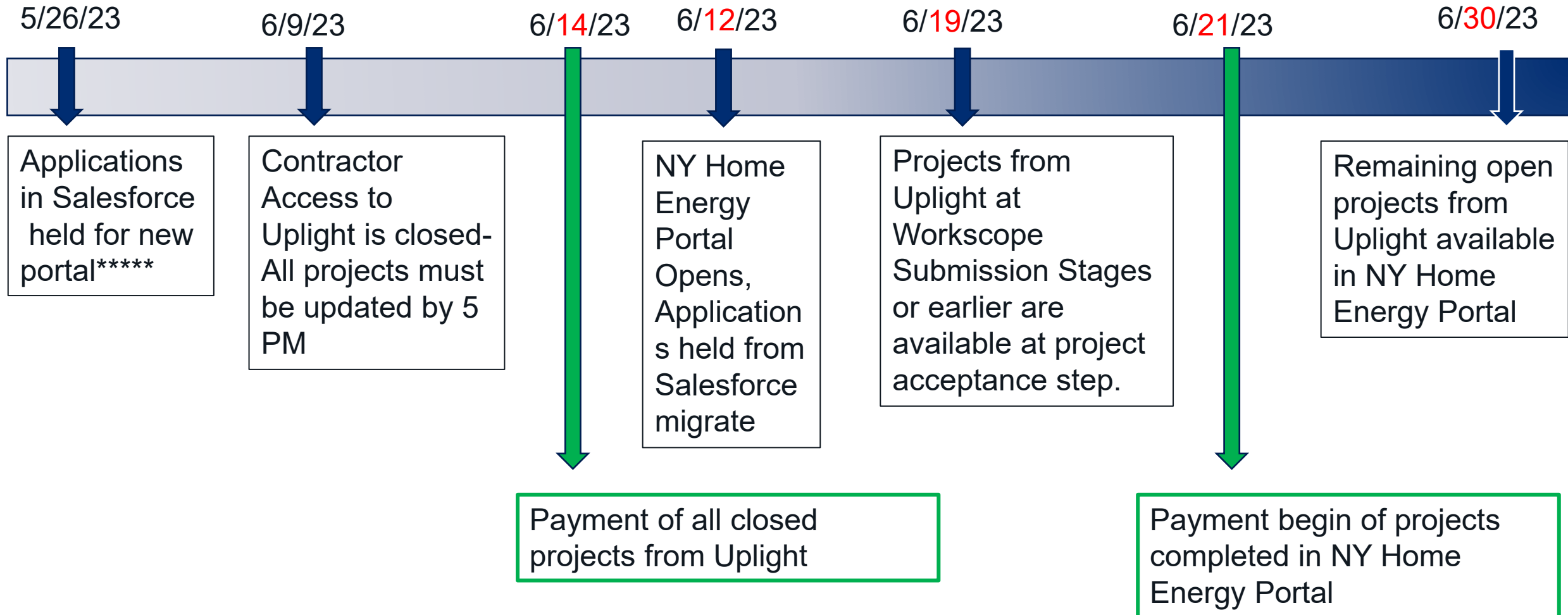


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Draft plan as of 3/20/23, subject to change

EmPower+ Portal Proposed Crossover Timeline

* these dates are approximate and subject to change based on data transfer variables



NY Home Energy Portal In-Person Training

Training Options

In-Person Sessions (Regional)

Single sessions, limited to 2 seats per contractor. Contractors have been preassigned to locations.

If you haven't yet registered, please check your email or reach out to your Account Manager – **by the end of TODAY**

- Registration link via SignUpGenius.

Open slots will be allocated beginning next week on a first request – first assigned basis.

In Person - Invite Only			
Day	Date	Location	# Sessions
Monday	4/10/2023	Albany	2
Wednesday	4/12/2023	NYC/LI	2
Friday	4/14/2023	Newburgh	2
Tuesday	4/18/2023	Buffalo	2
Wednesday	4/19/2023	Rochester	2
Thursday	4/20/2023	Syracuse	2

NY Home Energy Portal Virtual Sessions

Training Options (continued)

Live Virtual Sessions

Unlimited seats. Available to all staff wanting training. Five sessions dedicated to REA/EmPower+ **Participating Contractors** and two sessions dedicated to **Appliance Vendors**

Recording of Virtual Session

A recorded virtual training session will be posted after those sessions have been completed and will be available on the Contractor Support website and in the EmPower/AHP Knowledge Articles.

Virtual Session - Open to all			
Day	Date & Time	Registration Link	Audience
Tuesday	4/11/2023 9AM to 1PM	NY Home Energy Portal Training for Contractors	EmPower+ & REA Contractors
Tuesday	4/11/2023 2PM to 4PM	NY Home Energy Portal Training for Appliance Vendors	EmPower+ Appliance Vendors
Thursday	4/13/2023 8AM to 12PM	NY Home Energy Portal Training for Contractors	EmPower+ & REA Contractors
Thursday	4/13/2023 1PM to 5PM	NY Home Energy Portal Training for Contractors	EmPower+ & REA Contractors
Monday	4/17/2023 9AM to 1PM	NY Home Energy Portal Training for Contractors	EmPower+ & REA Contractors
Monday	4/17/2023 2PM to 4PM	NY Home Energy Portal Training for Appliance Vendors	EmPower+ Appliance Vendors
Friday	4/21/2023 9AM to 1PM	NY Home Energy Portal Training for Contractors	EmPower+ & REA Contractors

EmPower+ Update



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EmPower+

- **In Spring 2023, EmPower NY and Assisted Home Performance with ENERGY STAR® will combine into one program called EmPower+. By combining program offers and processes, accessing these programs will be easier for customers, contractors, and program partners.**
- **The transition to EmPower+ is the result of a multi-year effort which has included in depth systems planning and extensive stakeholder engagement.**
- **Collectively, EmPower+ will enable NYSERDA to scale up to meet New York State's aggressive climate goals, providing essential services to traditionally underserved communities and income-eligible customers.**
- **EmPower+ is a key component to achieving Governor Hochul's goal of 2 Million Climate Friendly Homes.**

Previous actions towards EmPower+

July 2021

- **Combined application- single online and paper application for both programs**
- **Geo-eligibility for subset of DAC communities**

March 2022

- **Standardize program rules across AHP and Empower**
- **TRM compliant modeling in EmPCalc**
- **First steps in modifying eligible measures and rebate levels towards making homes electrification ready and moving away from fossil fuels**

EmPower+ Timeline

2020

2021

2022

2023

2024

- **Stakeholder Engagement on Barriers and Needs to Inform Program Changes**
- **Systems Planning**
- **Program redesign**

- **Launched combined application for EmPower and Assisted Home Perf (AHP)**
- **Created online application**
- **Added geo-eligibility determination in application**

- **Administer NENY funding through EmPower**
- **Align AHP and Empower program rules, measures eligibility and processes**
- **TRM Compliant modeling in program tools**

- **(June) Complete transition to new program mgmt software**
- **Launch single, unified LMI program, EmPower+**
- **Plan for / secure IRA funding**

- **Further optimize Empower+**
- **IRA implementation**
- **Customer interface**

What's Included in EmPower+?

EmPower+ is a rebranding of NYSERDA's consolidated LMI programs, EmPower NY and Assisted Home Performance with ENERGY STAR.

- **Through EmPower+, NYSERDA will continue to will provide no-cost energy assessments, which identify all opportunities in the home, and eligible no-cost direct installation measures, installed by the Participating Contractor at the time of the assessment. It offers incentives toward energy efficiency measures to be completed in the home.**
- **The incentive levels for low and moderate-income customers will remain the same as currently are available through Assisted Home Performance and EmPower.**

This transition will be seamless for participation:

- **The application process is the same. Customers will NOT need to resubmit applications once EmPower+ launches**
- **The loan process to access Green Jobs – Green NY Residential Financing is NOT changing.**
- **Contractors will NOT need to reapply for program participation**

National Grid/NYSERDA Training Initiative



NYSERDA

Background

Additional energy efficiency service providers are needed in NYS to help meet the ambitious goals of the Climate Act.

The National Grid/ NYSERDA program will help to provide the necessary training of New York State residents to work in the energy efficiency and weatherization field.

Widely recognized and in demand trainings and BPI certifications will be subsidized for Targeted Participants through the funding of this initiative.

Targeted Participants

- **Employees or owners of established New York State Minority or Women Owned Business Enterprise (MWBE)**
- **Service-Disabled Veteran Owned Business (SDVOB)**
- **Indigenous-owned energy services companies operating in National Grid service territory**
- **Individuals living in Disadvantaged Communities (DACs) within National Grid service territory who are already employed in or wish to enter the energy services field to become qualified installers of energy efficiency measures and services throughout New York State**

Eligible BPI Training and Certifications Include

Building Science Principles (BSP)

While some may bypass with experience, BSP is still required for BA-T

Core

Building Analyst (BA)

Multifamily Building Analyst (MFBA)

Air Leakage Control Installer (also known as RBE-WHALCI)

Infiltration and Duct Leakage (IDL)

Envelope Professional (Env, EP)

Building Analyst Technician (BA-T)

Building Analyst Professional (BA-P)

Main BPI Contacts

Project Director: Larry Zarker (lzarker@bpi.org)

Project Manager: Lynn Griffith (lgriffith@bpi.org)

Project Administrator: Michelle Watrous (mwatrous@bpi.org)

BSP Contact: Nancy Kaplan (nkaplan@bpi.org)

Case Management & Escalation: New Training Videos in the Public Knowledge Base



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Training Videos – EmPower/AHP

Confluence

Resource & System Links Professional Development DEI Training

EmPower/AHP Participating Contractors

Save for later Watch Share

Introduction

The Combined Residential Application is intended to streamline the application process while broadening the scope of services approved Applicants are eligible for. The application can be accessed by navigating to [nyserda.ny.gov/ahp-empower](https://knowledge.nyserda.ny.gov/ahp-empower). Applicants can access and complete the application online (an Application Portal Account is required) or print, sign and mail in a paper application.

Applicants can receive assistance from Participating Contractors and/or Community Organizations when completing an application.

- Why Complete an Application Online?

The materials below provide additional resource and materials to help CEAs who are assisting Applicants when completing and submitting a Combined Residential EmPower/AHP Application. When assisting Applicants, refer to the Submitting a Combined Residential Application tab to help walk them through the process. Additionally, applicants can be provided the following link which will allow them to access related material specific to their needs: <https://knowledge.nyserda.ny.gov/pages/viewpage.action?pagelId=81855384>

- Additional Resource Materials

Managing Portal Access Submitting an Online Application Accessing a Submitted Application Creating Campaigns Case Management

Salesforce Portal

The Salesforce Portal allows Participating Contractors to manage and monitor Combined Residential projects assigned to them. Additionally, the Salesforce Portal allows Participating Contractors to communicate with NYSERDA Program and Program Implementation staff throughout the project lifecycle through use of the Salesforce Portal Chatter Feed.

The instructional materials below are intended to provide guidance for Participating Contractors when adding or removing users from the Salesforce Portal. The instructions on this page can only be completed by existing contractors who have been assigned the **Manage Users Tab** permission. This permission set must be set either by a NYSERDA employee or an existing contractor in your organization that has previously been granted this access. If you have access to this permission set you will have access to the **Manage Users** tab after logging into the Large Scale Renewables Salesforce Portal.

EmPower/AHP Participating Contractors

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Additional Resource Materials

Managing Portal Access

Submitting an Online Application

Case Creation

video

Case Escalation Process

video

Monitoring & Checking on Case Status

video

<https://knowledge.nyserda.ny.gov/pages/viewpage.action?pagelId=81855392>

Training Videos- HUBS

The diagram illustrates the navigation structure of the Hubs Salesforce User Guide. It shows two versions of the Confluence page, with a red arrow indicating a transition from the initial state to the final state.

Initial State (Left):

- Page Title:** Hubs Salesforce User Guide
- Introduction:** The Salesforce CRM Portal was developed to allow Hubs to manage relationships and interactions with records of customer interactions, and collect and organize data through automated reporting and dash step-by-step instructions on specific functions and activities, please access the tabs.
- Left Sidebar (Navigation):**
 - Introduction
 - Home
 - Leads
 - Contacts
 - Opportunities
 - Campaigns
 - Account
 - Projects
 - Reports
 - Events & Tasks
 - Invoicing
 - Case Management** (highlighted with a red arrow)
- Right Sidebar (Content):**
 - Introduction**
 - The information below reviews how to access and navigate the Sal multiple areas.
 - Related Training:**
 - + [Introductory Video](#)
 - Navigation and Core Concepts:**
 - + [Access to and Basic Navigation of the CRM Portal](#)
 - + [Important Terms, Acronyms & Definitions](#)
 - Universal Functions:**
 - + [Following Records](#)
 - + [Logging Calls](#)
 - + [Creating Tasks](#)

Final State (Right):

- Page Title:** Hubs Salesforce User Guide
- Introduction:** The Salesforce CRM Portal was developed to allow Hubs to manage relationships and interact records of customer interactions, and collect and organize data through automated reporting step-by-step instructions on specific functions and activities, please access the tabs.
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- Right Sidebar (Content):**
 - Case Management**
 - Case Creation**
 - > [video](#)
 - Case Escalation Process**
 - > [video](#)
 - Monitoring & Checking on Case Status**
 - > [video](#)

<https://knowledge.nyserda.ny.gov/display/PUBLIC/HUBS+Program+User+Guide>

Questions?



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