

Single Family Residential Program Update

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

May 12, 2023

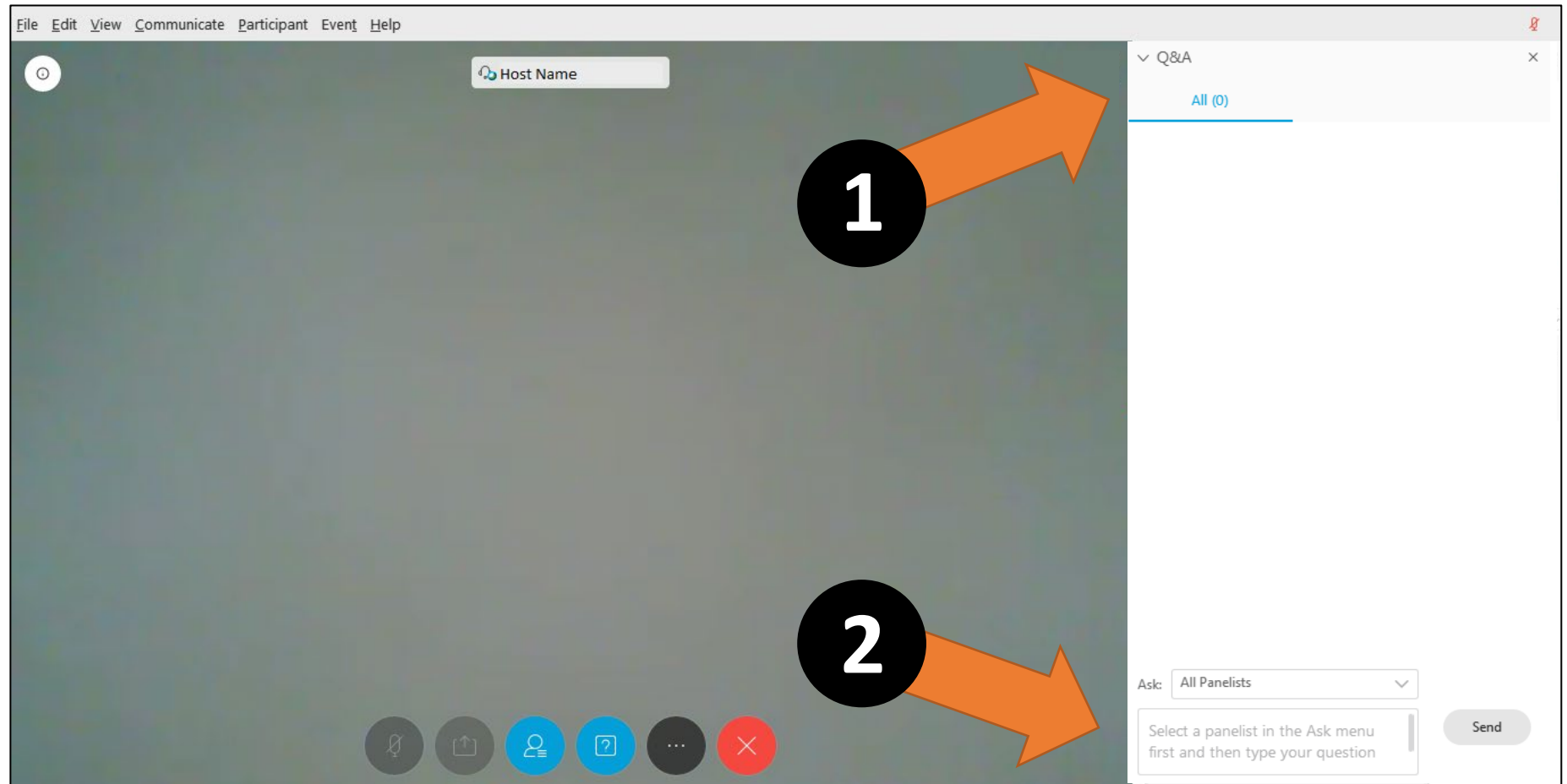


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Options for Q&A During Today's Webinar - Text

OPTION 1 - TEXT

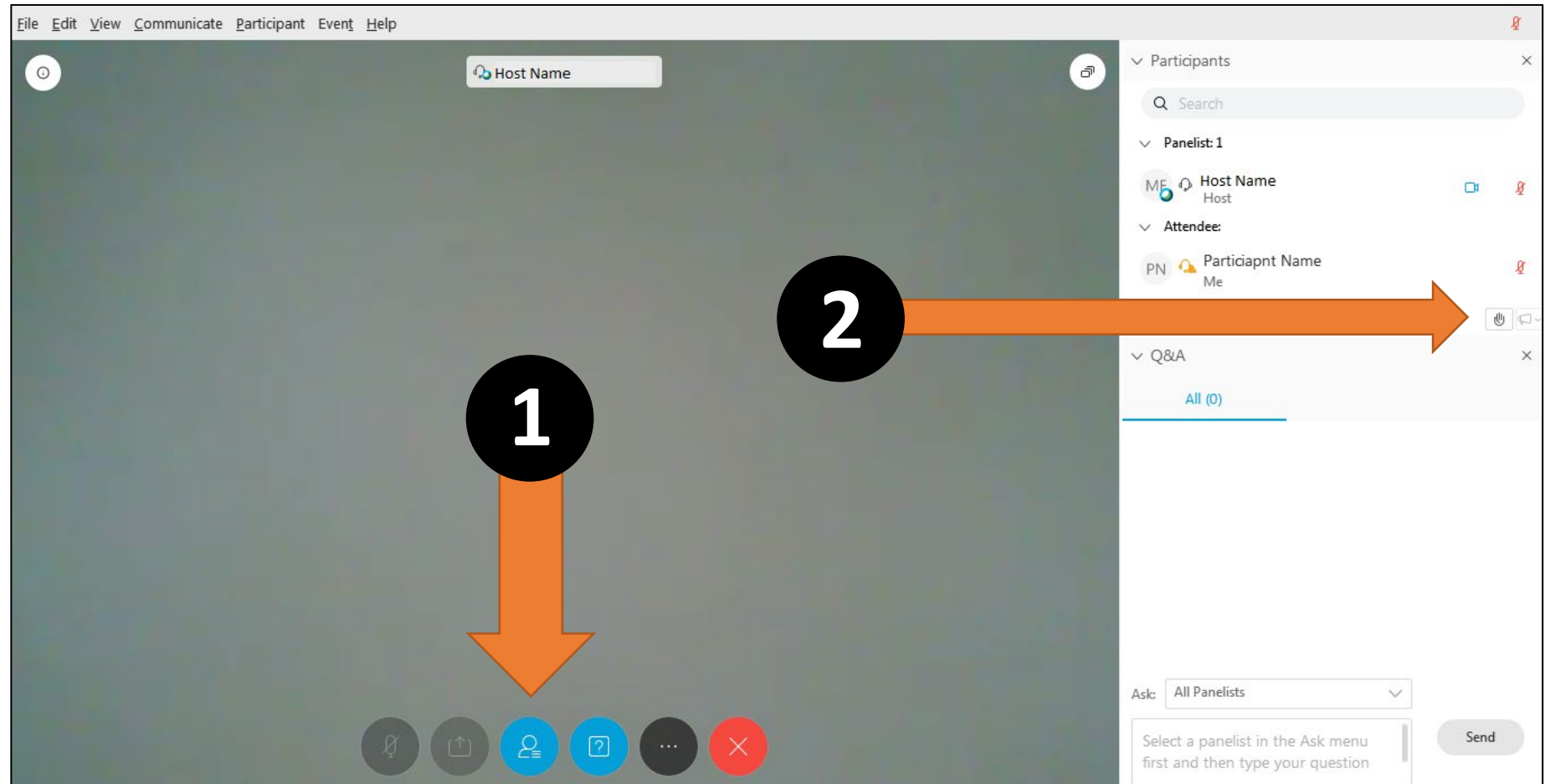
- > Locate the Q&A function in the upper right portion of your webinar panel.
- > Click on the small arrow to the left of "Q&A" to expand the text field.
- > Type your question into the text field and click "send."



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. EmPower+ Launch
2. NYHEP Key Dates: EmPower+
3. Knowledge Articles
4. Contractors that still require training
5. Office Hours & Q&A
6. Work In Progress
7. System Updates
8. Project Acceptance Reminder



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EmPower+ Launch



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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.

EmPower+ Name Change Transition

- **Name change** will happen in June 2023, across NYSERDA's website, consumer materials, etc.
- Participating contractor and partners are asked to have name changes made by August 2023
 - The national Home Performance with ENERGY STAR® program is being retired and the name and logo use should end by 2024
- New website URL: **Nyserda.ny.gov/empower**

This transition will be seamless for participation:

- Customers will NOT need to resubmit applications once EmPower+ launches
- Contractors will NOT need to reapply for program participation

NY Home Energy Portal

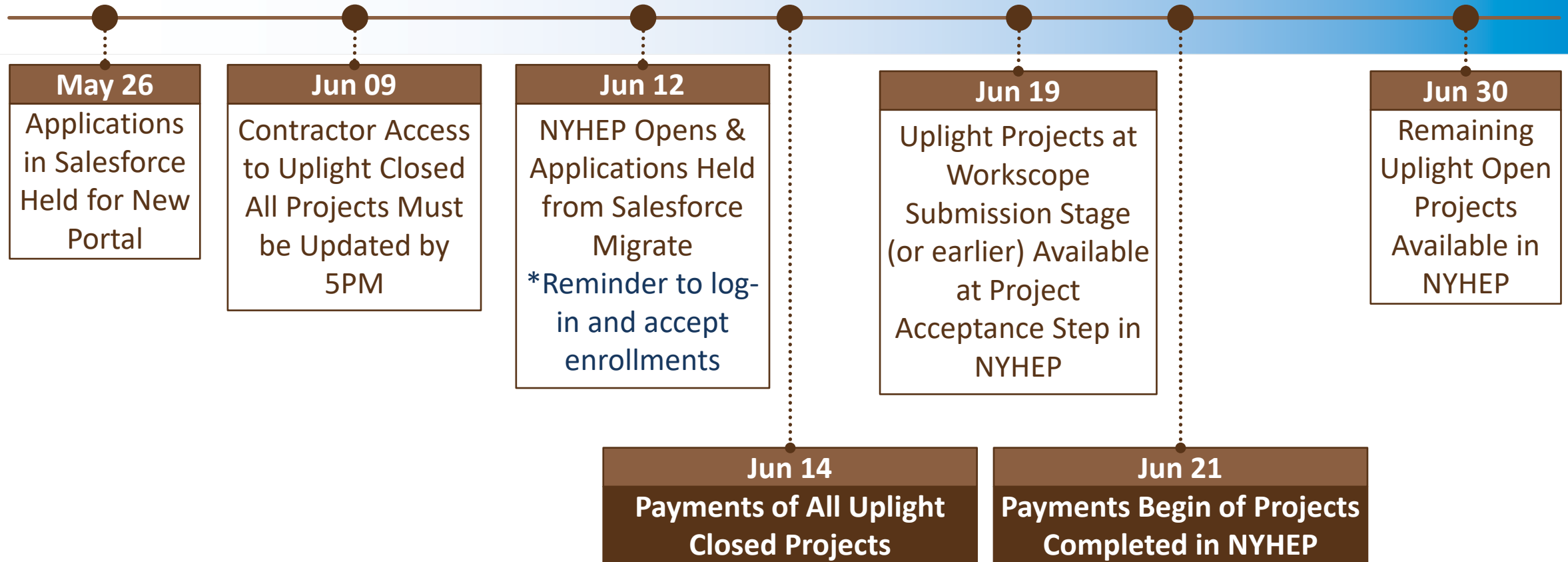
Key Dates: EmPower+



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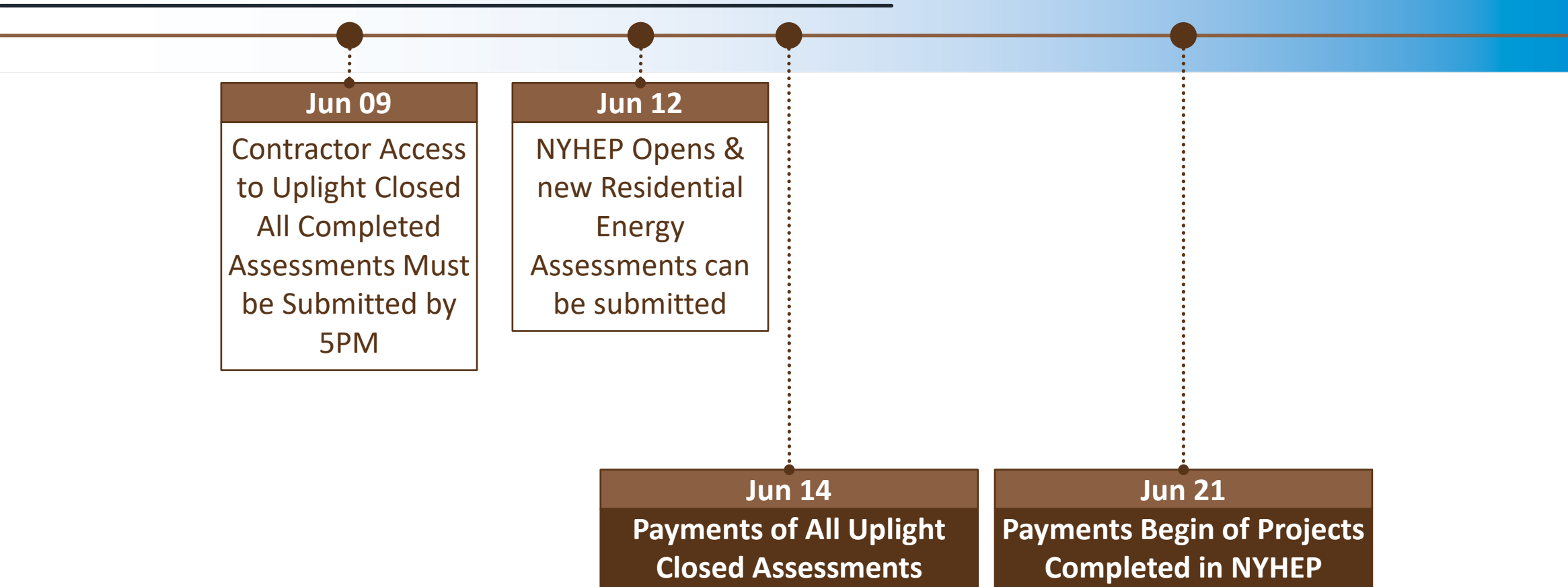
NY Home Energy Portal

Key Dates: EmPower+



The dates listed above are from a draft plan dated March 20, 2023. All dates are approximate and subject to change.

Key Dates: Residential Energy Assessments



The dates listed above are from a draft plan dated March 20, 2023. All dates are approximate and subject to change.

Knowledge Base Articles



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NY Home Energy Portal Resources

Guidance Documents

- Knowledge Articles
- <https://knowledge.nyserda.ny.gov/pages/viewpage.action?pageId=142641274>

Training Recording

- Recorded webinar of contractor training and vendor session
- Can be found on the main Knowledge Articles page using the link above.

Contacts

- EmPower+: Reach out to your Account Manager or support.residential@nyserda.ny.gov
- Residential Energy Assessment (REA) Program: homeaudits@nyserda.ny.gov



The screenshot shows a Confluence page titled "NY Home Energy Portal: Participating Contractors". The page content includes an introductory paragraph, instructions on how to request an account, a link to log into the portal, and a link to a printable Quick Start Guide. Below this, there is a green-bordered box containing three links: "Important Terminology", "Training Video", and "NY HEP Measures List". At the bottom of the page, there are four cards: "NY Home Energy Portal Overview", "Appliance Enrollments", "EmPower+ Enrollments", and "REA Enrollments", each with a brief description of its content.

Confluence

NY Home Energy Portal: Participating Contractors

This page contains materials to support the NY Home Energy Portal, which is used by Participating Contractors to submit projects to NYSERDA. Each card below provides access to training materials and resources to help through the enrollment process. Click the card that corresponds with your enrollment type to access the related training materials and resources.

To request a NY Home Energy Portal account, Participating Contractors can submit a case to support.residential@nyserda.ny.gov or create one manually by logging into the NYSERDA Portal (Salesforce).

To log into the the NY Home Energy Portal, follow this link: **NY Home Energy Portal**.

We have also prepared a printable **Quick Start Guide** that will review some basic NY HEP functions.

- > Important Terminology
- > Training Video
- > NY HEP Measures List

NY Home Energy Portal Overview	Appliance Enrollments	EmPower+ Enrollments	REA Enrollments
Provides a general overview of the NY Home Energy Portal including: General Navigation, Searching for Enrollments, and Reporting.	User information for submitting and managing EmPower+ Appliance orders	User information for submitting and managing EmPower+ enrollments	User information for submitting and managing Residential Energy Assessment enrollments

Individuals Still Requiring Training



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NY Home Energy Portal

Individuals Still Requiring Training

Individuals that did not attend either an in-person or virtual training must view a training recording and complete the assigned homework to receive NY HEP login credentials. Instructions below outline the steps:

1. Sign-up by sending your name, company, and email address to tech.updates@clearesult.com
 - Users will receive a welcome email with their log-in credentials on a weekly cadence, links to training video, homework assignment and additional resources.
2. View training recording
 - <https://knowledge.nyserda.ny.gov/pages/viewpage.action?pageId=142641274>
3. Complete the two homework assignments
 - Upon approval, access to the production environment will be provided when the system goes live.

Separate login credentials are required for each NYHEP user. Shared logins are a security risk for both NYSERDA and your company.

NYHEP Office Hours & Q&A Opportunity



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NY Home Energy Portal Office Hours – Q & A Opportunity

Each week in May and June, staff from the Residential Energy Assessment (REA) and EmPower/AHP Programs will be available to field questions on the NY Home Energy Portal (NYHEP).

Participating contractors should bring their “How do I...” questions on modeling, forms/reports, homework assignments, etc. to be prepared for the transition to the NYHEP in June.

Registration Link	Day/Time	Topic
Office Hours #1	Fri, May 5, 3-4 PM	EmPower+/Appliance
Office Hours #2	Wed, May 10, 9-10 AM	REA
Office Hours #3	Wed, May 10, 10-11 AM	EmPower+/Appliance
Office Hours #4	Thu, May 18, 3-4 PM	REA
Office Hours #5	Thu, May 18, 4-5 PM	EmPower+/Appliance
Office Hours #6	Tue, May 23, 3–3:45 PM	REA
Office Hours #7	Tue, May 23, 3:45-4:30 PM	EmPower+/Appliance
Office Hours #8	Wed, May 31, 9-10 AM	EmPower+/Appliance
Office Hours #9	Thu, Jun 8, 3-4 PM	All Workflows
Office Hours #10	Tue, Jun 13, 3-4 PM	All Workflows
Office Hours #11	Wed, Jun 21, 9-10 AM	All Workflows
Office Hours #12	Thu, Jun 29, 3-4 PM	All Workflows

NYHEP

In Progress Work



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NY Home Energy Portal

In-Progress Work (1 of 2)

To avoid transition impacts contractors should prioritize completing in-progress work.

Projects that are in-progress on June 9th may require remodeling in the NY Home Energy Portal, while others may only require some additional inputs to satisfy system required information.

To ensure data was transitioned accurately, contractors should review inputs on all in-progress projects.

NY Home Energy Portal

In-Progress Work (2 of 2)

NY HP Portal (Uplight) Workflow	NY HP Portal (Uplight) Stage as of June 9	NY Home Energy Portal (NY HEP) Step	Additional Modeling Needed in NY HEP
Combined Residential Applications held as of May 26	n/a	Enrollment Acceptance (6/12)	Full model
EmPower	Project Acceptance	Enrollment Acceptance (6/19)	Full model
	Workscope Submission	Workscope Submission (6/19)	Full model
	Final Project Submission	Final Project Submission (6/30)	As needed based NY HEP requirements
	Final Project Review – Not Approved	Final Project Submission (6/30)	As needed based NY HEP requirements
	Final Project Review – Approved	Closed Complete (6/30)	No
Express Audit	Audit Claim	Workscope Submission (6/19)	Full model
Express Contract	Projects not Approved	Workscope Submission (6/19)	Full model
	Final Project HPXML/Documents	Final Project Submission (6/30)	As needed based NY HEP requirements
	Final Project Document Review – Not Approved	Final Project Submission (6/30)	As needed based NY HEP requirements
	Final Project Document Review - Approved	Closed Complete (6/30)	No

System Updates



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NY Home Energy Portal

System Updates (1 of 5)

Significant updates since the In-person and Virtual trainings.

1. If no Refrigerator/Freezer is planned for a Tier 1 enrollment, the Appliance Exchange Agreement (AEA) is a required document on the EmPower+ enrollment.
 - When an appliance is planned, the AEA needs to be uploaded to the documents tab on the Appliance enrollment.
2. P (planned) vs I (installed) measure columns.
3. Assessment measures will no longer be automatically added, they will need to be manually added. – *Temporary change only and anticipated to last for only a few months*
4. Cost is not required when a measure is only recommended to a customer.
5. Checkbox added to the Energy Education measure to indicate that the Actions were provided on an uploaded document. – *COMING SOON*
 - Manual entry of Actions would not be needed with uploaded form.
6. The Workscope Review step will be turned back on Friday, May 19.

NY Home Energy Portal System Updates (2 of 5)

P (Planned) vs I (Installed) Measures

- Full Comprehensive and Muni Install Project Types
 1. All measures, including Direct Install, will be considered Planned (P) rather than Installed (I). Only the “P” column in Measure will be visible at Workscope Submission.
 2. Both Planned (P) and Installed (I) measure columns will remain visible at Final Project Submission.
- Audit Install Project Types
 3. All measures will be considered Installed (I) and only the “I” column will be visible at Workscope Submission.

①

Workscope Submission - Measures - New

Process Save Close Enrollment Profile Add Measures Double Dip Report

Enrollment Measures

#	^		Measure Name	Measure		Unit Price
				Unit	P Qty	
1	^	✗	ADD MEASURE - Assessment Fee (ASSESS)	Each	1	\$25

②

Final Project Submission - Unscheduled / Awaiting Results

Process Save Close Enrollment Profile New Appliance Enrollment Add Measures Scan Measures

Measures

#	^		Measure Name	Unit	P Qty	I Qty	Unit Price
2	v		ADD MEASURE - Assessment Fee (ASSESS)	Each	1	1	

③

Workscope Submission - Measures - New

Process Save Close Enrollment Profile Add Measures Double Dip Report

Enrollment Measures

#	^		Measure Name	Measure		Unit Price
				Unit	I Qty	
1	^	✗	ADD MEASURE - Assessment Fee (ASSESS_AI)	Each	1	\$25

NY Home Energy Portal

System Updates (3 of 5)

The six (6) required assessment measures will no longer be automatically added, they will need to be added manually.

For easy identification, the required measures were moved to the top of the Add Measures list pop up and renamed to begin with ADD MEASURE...

Note: This is a temporary change only and it is anticipated to last for only a few months.

Workscope Submission - Measures - New

Process Save Close Enrollment Profile **Add Measures** Double Dip Report

Enrollment Measures						
#		Measure Name	Measure Unit	P Qty	Unit Price	Amount
1	✓	ADD MEASURE - Assessment Fee (ASSESS)	Each	1		
2	✓	ADD MEASURE - Blower Door Test - Test IN (BDT_IN)	Each	1		
3	✓	ADD MEASURE - Combustion Appliance Zone (CAZ) Test - Test IN (CAZT_IN)	Each	1		
4	✓	ADD MEASURE - Energy Education (EE)	Each	1		
5	✓	ADD MEASURE - Funding Information (FUNDINFO)	Each	1		
6	✓	ADD MEASURE - Mileage (MILE)	Miles	30		

Add Measures

<input type="checkbox"/>	No. to Add	Measure Code	Measure Name
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	1	ASSESS	ADD MEASURE - Assessment Fee
<input checked="" type="checkbox"/>	1	BDT_IN	ADD MEASURE - Blower Door Test - Test IN
<input checked="" type="checkbox"/>	1	CAZT_IN	ADD MEASURE - Combustion Appliance Zone (CAZ) Test - Test IN
<input checked="" type="checkbox"/>	1	EE	ADD MEASURE - Energy Education
<input checked="" type="checkbox"/>	1	FUNDINFO	ADD MEASURE - Funding Information
<input checked="" type="checkbox"/>	1	MILE	ADD MEASURE - Mileage
<input type="checkbox"/>		ADDAS	Additional Measures - Attic

Save Close

NY Home Energy Portal

System Updates (4 of 5)

Cost is not required when a measure is only recommended to a customer.

Enrollment Measures

#		Measure Name	Measure		Measure Cost		Incentive		Savings »						
			Unit	P Qty	Unit Price	Amount	Unit Price	Amount	kWh	Therms	MMBTu	Assessment kWh	Assessment Therms		
7	^	Air Source Heat Pump (ASHP)	Each	<input type="text" value="1"/>	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00	0.0000	0.0000	0.0000	-2,695.8943	682.1496		

Is this recommended for the assessment only (no incentives)?:

Yes

Cost:

Measure recommended; Cost not required

Enrollment Measures

#		Measure Name	Measure		Measure Cost		Incentive		Savings »						
			Unit	P Qty	Unit Price	Amount	Unit Price	Amount	kWh	Therms	MMBTu	Assessment kWh	Assessment Therms		
7	^	Air Source Heat Pump (ASHP)	Each	1	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00	-2,695.8943	682.1496	68.2150	-2,695.8943	682.1496		

Is this recommended for the assessment only (no incentives)?:

No

**Cost:

\$12,000.00

Measure planned; Cost required

NY Home Energy Portal System Updates (5 of 5)

The Workscope Review step will be turned back on Friday, May 19.

Enrollments requiring a Workscope Review will be reviewed/passed by CLEARResult and advanced to Final Project Submission. This step may take up to 2 days depending on the number of enrollments submitted.

Project Acceptance Reminder - Uplight



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Project Acceptance Reminder

EmPower projects in the Uplight Portal must be accepted within 10 business days of assignment or they will be returned to Program for reassignment. If you intend to assist the customer, please accept the project immediately. You can always return the project if you're unable to move forward with completion.

To accept the project:

1. Log into your Uplight account and navigate to the “Have New Assignments” tile.
2. Open a new project assignment by clicking the link.
3. Review the project information on the right-hand side.
4. Select a “Review Result” reason.
5. Click “Send Now” button.

The screenshot displays the Uplight Portal dashboard with three main statistics tiles: 193 ACTIVE PROJECTS, 11 HAVE NEW ASSIGNMENTS (circled in green), and 182 ARE PAST-DUE. Below these is a tile for 0 ARE ON-TRACK. A green box highlights the 'Review result *' dropdown menu, which is open, showing options: Accept, Denied - No crews available at this time, Denied - Cannot complete within program deadlines, Denied - Do not wish to serve this customer or location, and Denied - Other.

Category	Count
Active Projects	193
Have New Assignments	11
Are Past-Due	182
Are On-Track	0

Review result *

- Accept
- Denied - No crews available at this time
- Denied - Cannot complete within program deadlines
- Denied - Do not wish to serve this customer or location
- Denied - Other

Questions?



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