

# Single Family Residential Program Update

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

July 7, 2023

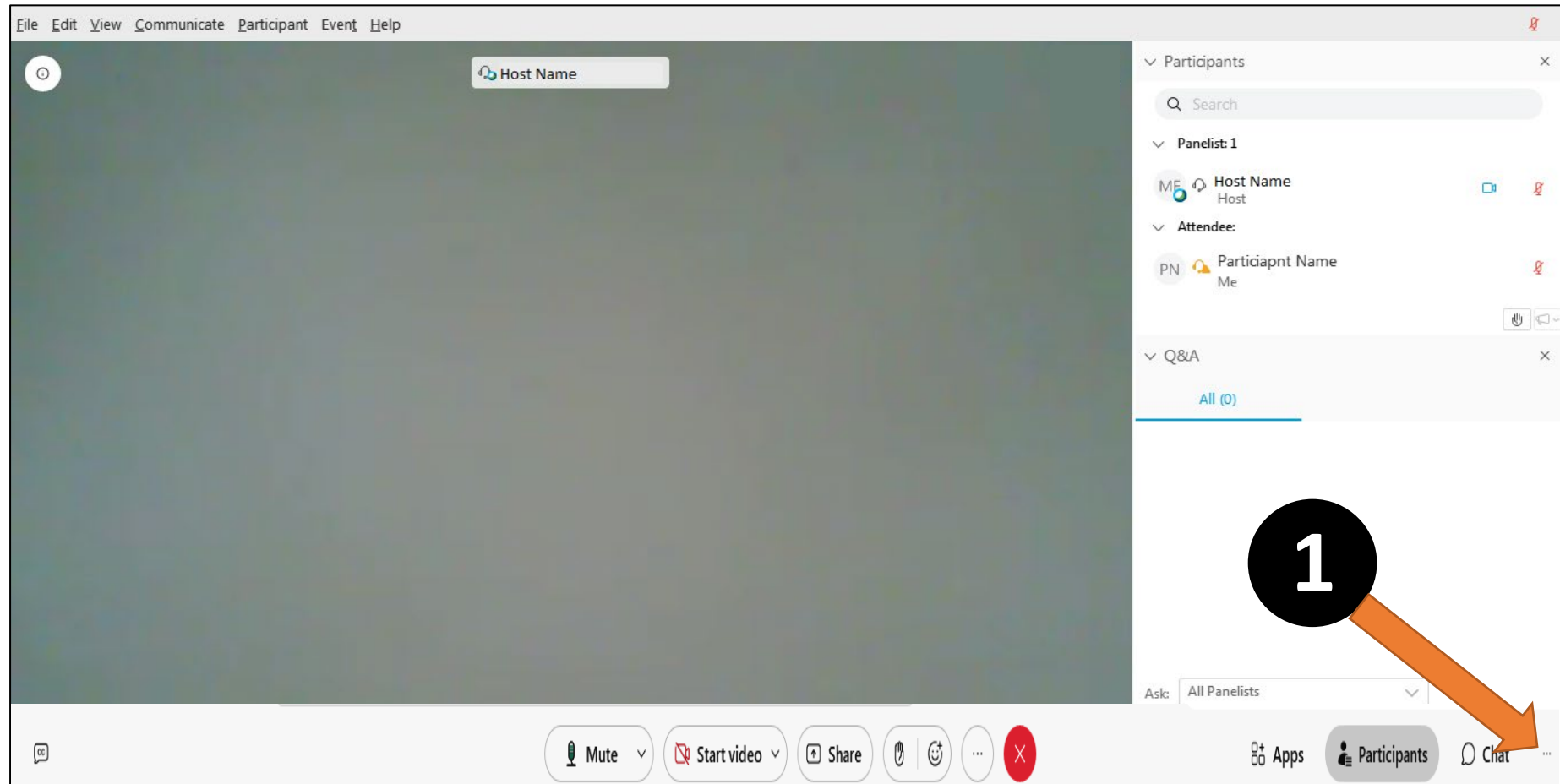


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# Options for Q&A During Today's Webinar - Text

## OPTION 1 - TEXT

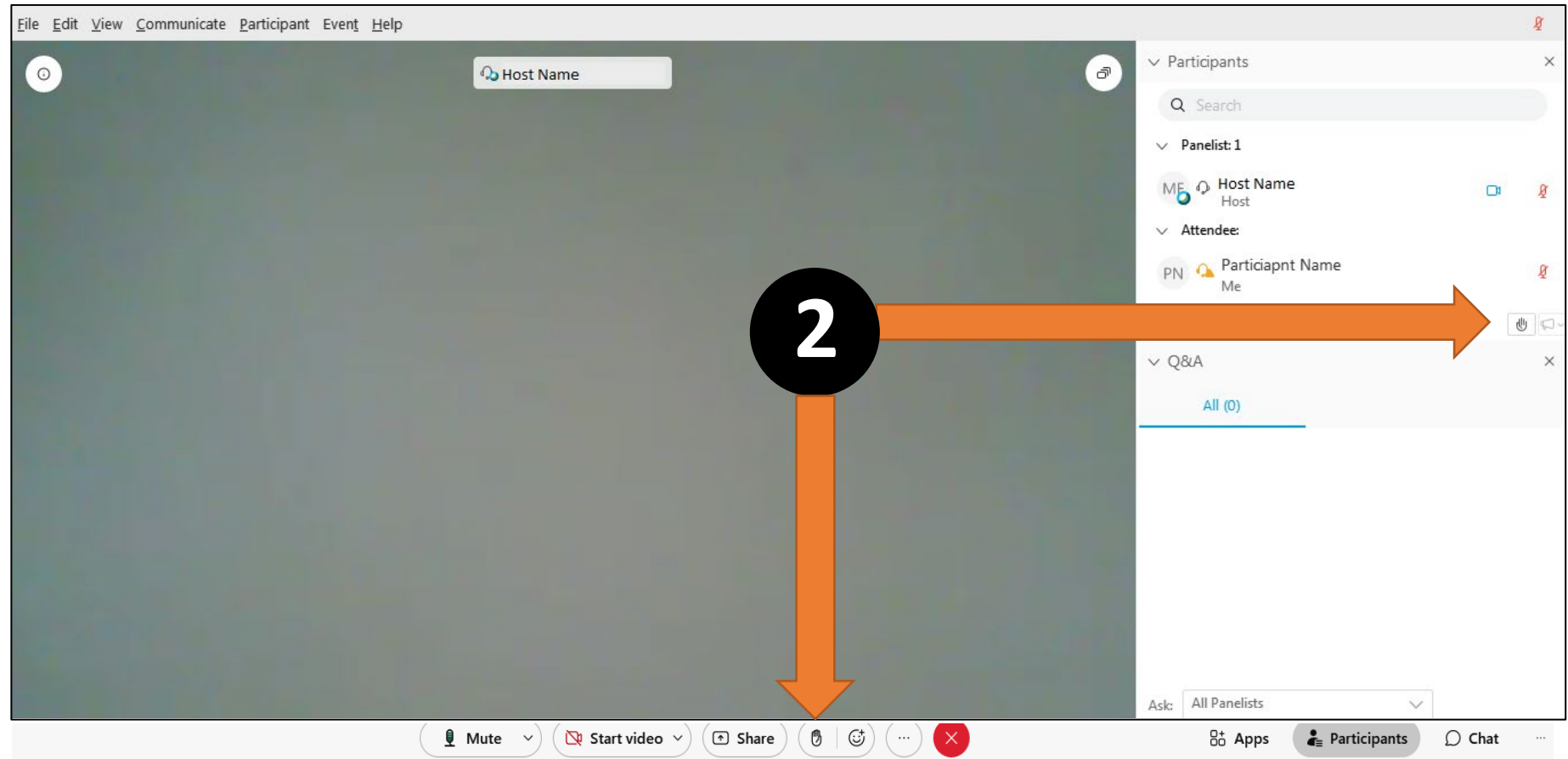
- > Locate the Q&A function by clicking on the 3 dots in the lower right portion of your webinar panel.
- > Click on "Q&A" to expand the text field.
- > Type your question into the text field and click "send."



# 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 to the right of your name in the participant panel or in the toolbar on the bottom of your screen.
- > 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. Updates/Changes in NYHEP – Live presentation
  - Two-factor authentication for NYHEP login
2. Data migration and projects at Final Project Submission
3. Data collection form – presented by TS.
4. Update on support/office hours – presented by TS.
5. NYHEP Timeline
6. Resources
7. Further training
8. Appliance fee update and blower door/assessment pricing update – presented by Scott.



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# **Final Project Submission migration update**



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# NY Home Energy Portal In-Progress Work

Projects at Final Project Submission (Uplight) migrating to Workscope Submission (NY HEP)

- A savings issue was identified during migration testing of in-flight projects that will require most projects at the Final Project Submission stage in Uplight to be migrated to Workscope Submission step in NY HEP.
- This occurs because EmPCalc and NY HEP have different data collection processes. In general, EmPCalc collects baseline data on each measure as it is proposed and NY HEP collects baseline data at the beginning with measure(s) referencing a single measure's baseline data. When baseline data is missing abnormally high savings are generated.
- EmPCalc: 2 same measures = 2 distinct baselines | NY HEP: 2 same measures = 1 common baseline
- Example: In EmPCalc, two measures with the same name (*i.e.*, open attic, mobile home belly, wall) were proposed. The baseline data of those measures needs to be migrated into one baseline. This process cannot be automated for migration.

# NY Home Energy Portal In-Progress Work

Projects at Final Project Submission (Uplight) migrating to Workscope Submission (NY HEP)

How does this impact contractors?

- Additional modeling needed to the return the project to the Final Project Submission step.
- \$25 will be added to the Assessment Fee on enrollments (projects) when this is needed.
- Current pricing will be applied to enrollment which may increase total cost.
- Prior approval will be honored if no changes were made to measures or quantities. Changes will trigger a fresh review to current program requirements.

Additional Applicant Information		
<b>Assigned Project Type</b> Full Comprehensive	<b>**Project Type</b> Full Comprehensive	<b>Maximum Incentive Amount</b>
<b>Household Demographics Details</b> Prefer Not to Answer	<b>**Number of Household Members</b> 3	<b>60 years of age or older</b> 0
<b>Persons with disabilities</b> 0	<b>Children age 17 years or younger</b> 2	<b>Veteran or Disabled Veteran</b> 0
<b>Approved Income Tier</b> 1	<b>Referral Source</b> Contractor	<b>Details Provided by Customer</b>
<b>Application Assistant</b>	<b>Application Number</b> 522059	<b>Date Application Approved</b> 10/19/2022
<b>Estimated Completion Date</b> 10/21/2023	<b>Application Priority Reason</b>	<b>Method of Eligibility Determination</b> 0
<b>Residential Contact Opt-out</b> true	<b>Referral ID</b> 00Q8z000001FDQ5EAO	<b>Date Application Received</b> 10/18/2022
<b>Workscope Approved Prior to 2023 System Migration</b> Yes		

Indicator on Workscope Submission step:  
Applicant Information > Additional Applicant  
Information > Workscope Approved Prior to 2023  
System Migration

# Updates/Changes in NYHEP

## – Live presentation

- Two-factor authentication for NYHEP login



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# NY Home Energy Portal

## System Updates (1 of 6)

Significant updates since the In-person and Virtual trainings.

1. Multi-factor Authentication
2. 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.
3. P (Planned) vs I (Installed) measure columns.
4. 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*
5. Cost is not required when a measure is only recommended to a customer.
6. Workscape Submission – Usage & Fuel Information update

# NY Home Energy Portal System Updates (2 of 6)

## Multi-Factor Authentication (MFA)

- Multi-step login process to secure data and applications requiring a user to enter more information than just a password.
- NY HEP has a two-step process for authentication.
- Re-verify after 90 days or if user has not logged in with the device within the last 14 days.
- User account is locked after 5 failed attempts.



# NY Home Energy Portal System Updates (3 of 6)

## Multi-Factor Authentication Steps for NY HEP

1. Login using username and password provided.
2. Two-Step Verification box appears.
3. Email notification automatically sent containing a 6-digit code to address on file.
  - Subject: Your EECF Two-Step Verification Code
  - Sender: [nyhep@nyserda.ny.gov](mailto:nyhep@nyserda.ny.gov)
  - Code expires after 5 minutes
  - Use *Resend it* link if code expires
4. Enter the code in the box and click the Sign In button.

Contact Contractor Support with issues:

- [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov)
- Call toll free: (800) 284 – 9069

The diagram illustrates the four steps of the Multi-Factor Authentication process for the NY Home Energy Portal (HEP):

- 1. Sign in to EECF:** A login form with fields for Username and Password. It includes a "Forgot Password?" link and a "Remember Me" checkbox.
- 2. Two-Step Verification:** A box that appears after login, stating "We have sent a 6-digit code to your email. Enter it below to verify your device." It contains a "Code" input field, a "Resend it" link, and a "Sign In" button.
- 3. Your EECF Two-Step Verification Code:** An email notification from [nyhep@nyserda.ny.gov](mailto:nyhep@nyserda.ny.gov) dated Fri 30-Jun-23 6:44 AM. The email contains the 6-digit code **123456** and instructions to not reply and to use the code for Two-Step Verification.
- 4. Sign In:** The final step, indicated by the "Sign In" button in the Two-Step Verification box.

# NY Home Energy Portal System Updates (4 of 6)

## 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 (5 of 6)

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 (6 of 6)

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	1	\$12,000.00	\$12,000.00	\$0.00	\$0.00	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

## Measure tab: Key Fields

### Header Fields

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

- Measure Cost: Measure cost to NYSERDA that incentives are based on
- Incentive: NYSERDA program incentives

### Measure Fields

- Cost: Total measure cost not including incentives or alternate funding **\*\*Cost:**
- Alternate Funding: Non-NYSERDA program rebates or incentives **Alternate Funding:** ☐ Utility ☐ WAP ☐ 3rd Party

### Funding Information (FUNDINFO)

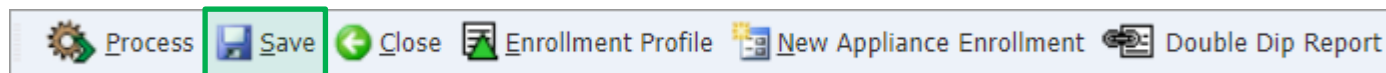
*New field added at the bottom to indicate if additional funding is needed for project incentives to be approved. Field name changes depending on what is needed.*

- Additional Funding Requested Above Maximum Incentive Amount: Tier 1 only; displays how much additional funding is being requested above the enrollment’s maximum incentive.
- Additional Customer Contribution Required: Amount needed for project to meet Project Level Cost Effectiveness (Tier 1 or 3) or to not exceed the Maximum Incentive Amount (Tier 3). Needs to be \$0.

# NY Home Energy Portal

## Measure tab: Saving

Under certain conditions users may need to click Save more than once to update a measure's dollar and energy savings on the Measures tab.



**Save button** (Windows = Alt + S | Mac = Command (or Cmd) ⌘ + S)

- Save #1: Updates the Measure
- Save #1.5: Needed if a measure is dependent on another measure (*i.e.*, heating/cooling system or water heater)
- Save#2: Updates the Totals in the Funding Information (last measure in list)

In general, if a field does not appear to be calculating correctly, click **Save button**

Don't generate a report until you're comfortable that the savings have been calculated



# NY Home Energy Portal Usage & Fuel Information

The Usage & Fuel Information section of Workscope Submission in the NY Home Energy Portal has been updated to account for Delivered Fuel Usage.

Section: **Utility Information** – No change

Section: **Delivered Fuel Information**

- Added new field “**Annual Delivered Fuel Usage**”

Section: **Electric Usage Information** – No change

Section: **Heating Usage Information**

- This section is now labeled “**Fossil Fuel Usage Information.**”
- Renamed “~~Annual Heating Usage~~” is now labeled “**Annual Natural Gas Usage (Therms)**”
- Removed “~~Heating Usage Unit~~” field
- Added new field “**Annual Fossil Fuel Usage (Therms)**”
- Renamed “~~Annual Heating Usage MMBTU~~” is now labeled “**Annual Fossil Fuel Usage MMBTU.**”

The screenshot displays a web form titled "Usage & Fuel Information" with three main sections:

- Delivered Fuel Information:** Includes a dropdown for "Delivered Fuel" (set to "Oil"), a "Unit Type" dropdown (set to "Gallon"), a "Price Per Unit" field (\$5.0500), and a new highlighted field for "\*\*Annual Delivered Fuel Usage".
- Electric Usage Information:** Includes a field for "\*\*Annual Electric Usage (kWh)" (10000.0000), a dropdown for "\*\*Electrical Panel Box Size (amps)" (200), and a dropdown for "\*\*Electric Panel Type" (Breakers).
- Fossil Fuel Usage Information:** Includes a dropdown for "\*\*Is Primary Fossil Fuel Usage Available?" (Yes), a new highlighted field for "\*\*Annual Natural Gas Usage (Therms)", a highlighted field for "Annual Fossil Fuel Usage (Therms)" (0.0), and a highlighted field for "Annual Fossil Fuel Usage MMBTU" (0).

# **Contractor Support Website**

## **– Forms Update –**

## **EmPower+ Data Collection Form**



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# Contractor Support Website Update

- The [Forms](#) section on the [Contractor Support Website](#) has been updated.
- The [EmPower+ Data Collection Form](#) has been added as a printable PDF.
- This form can be used to gather data in the field for entry into the NY Home Energy Portal if desired.



# New Office Hours with links to register



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# NY Home Energy Portal Office Hours – Q & A Opportunity

- Office hours will continue through August. 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 July.
- Additional times may be added, please check the Program Announcement for updated schedules.

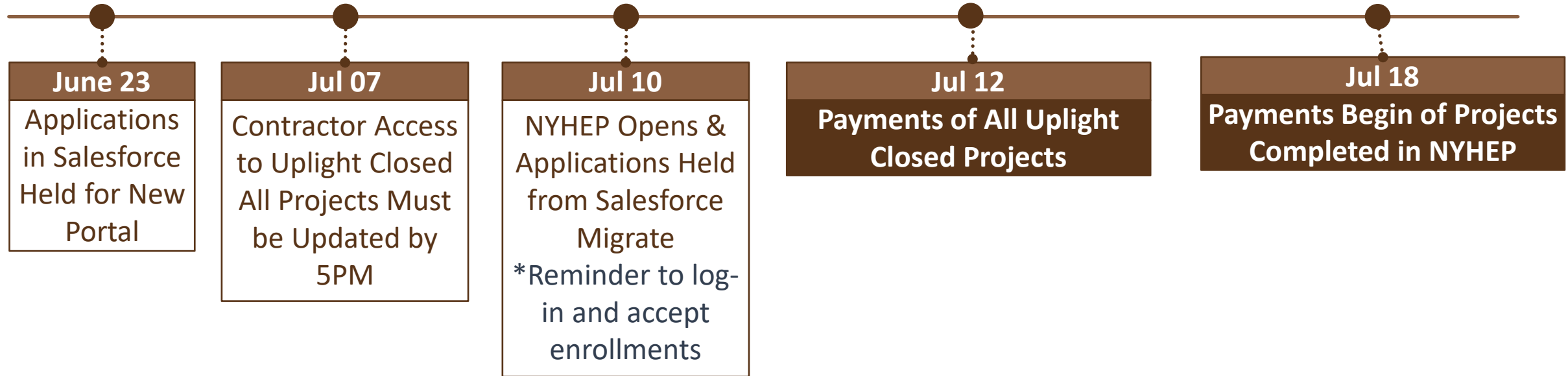
Registration Link	Day/Time	Topic
<a href="#"><u>Office Hours #13</u></a>	Tue, July 11, 9-10 AM	All workflows
<a href="#"><u>Office hours #14</u></a>	Wed, July 19, 3-4 PM	All workflows
<a href="#"><u>Office Hours #15</u></a>	Thu, July 27, 9-10 AM	All workflows
<a href="#"><u>Office Hours #16</u></a>	Tue, Aug 1, 3-4 PM	All workflows
<a href="#"><u>Office Hours #17</u></a>	Wed, Aug 9, 9-10 AM	All workflows
<a href="#"><u>Office Hours #18</u></a>	Thu, Aug 17, 3-4 PM	All workflows
<a href="#"><u>Office Hours #19</u></a>	Tue, Aug 22, 9-10 AM	All workflows
<a href="#"><u>Office Hours #20</u></a>	Wed, Aug 30, 3-4 PM	All workflows

# Key Dates EmPower+ & REA

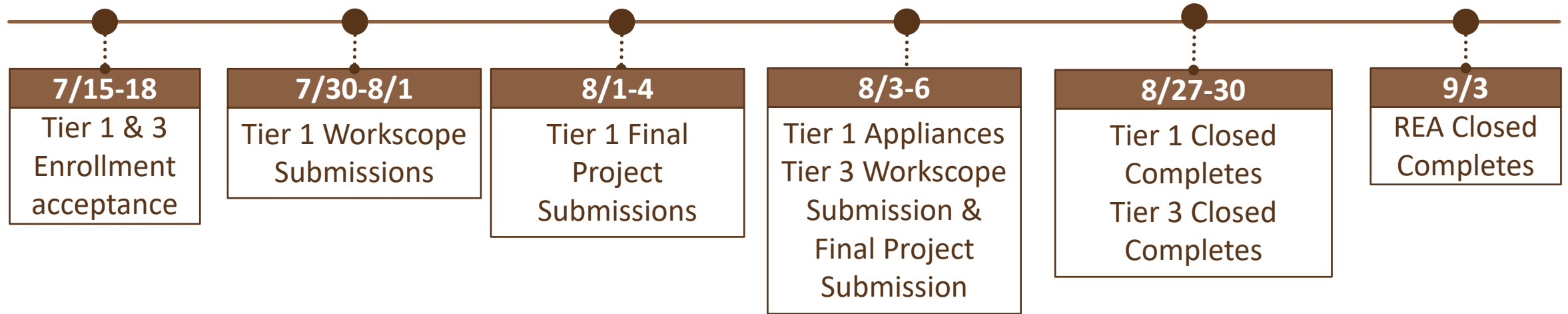


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# Key Dates: EmPower+



# Project Migration Dates: EmPower+ and REA

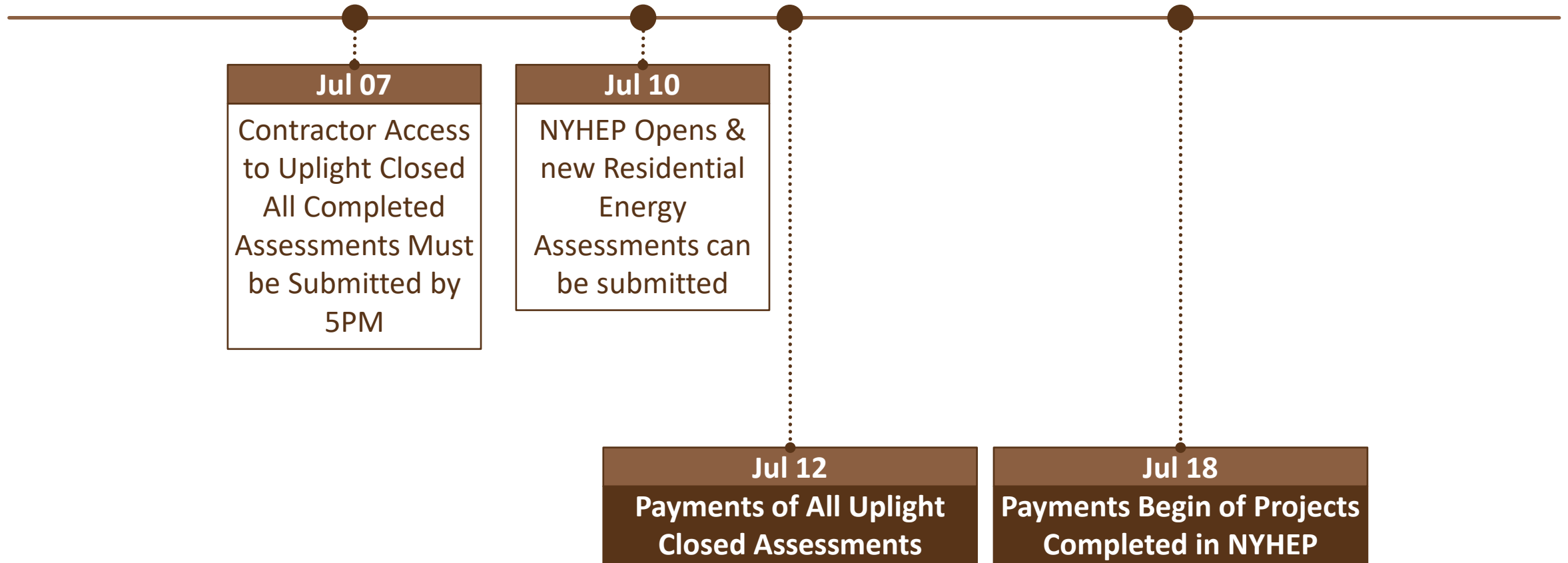


These are the best estimates we have at this time.

There maybe system outages and slow downs after business hours as data is migrated to the new system.



# Key Dates: Residential Energy Assessments



There may be minor change as we near launch; however, no additional significant delays are expected.

# Resources



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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](mailto:support.residential@nyserda.ny.gov)

Residential Energy Assessment (REA) Program: [homeaudits@nyserda.ny.gov](mailto: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 columns, each with an icon and a title: "NY Home Energy Portal Overview" (person icon), "Appliance Enrollments" (appliance icon), "EmPower+ Enrollments" (lightning bolt icon), and "REA Enrollments" (house icon). Each column has a brief description of the resources available.

**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 NYSEDA. 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](mailto:support.residential@nyserda.ny.gov) or create one manually by logging into the NYSEDA 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. **New user\* requests for NY HEP UAT will be processed starting the week of July 17. Access to the production site will be provided after homework assignment has been completed.**
- 1. Sign-up by sending your name, company, and email address to [tech.updates@clearesult.com](mailto: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 NY HEP user. Shared logins are a security risk for both NYSERDA and your company.***

# **Appliance fee and assessment Blower door fee changes**



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# Fee Changes

- The client no show fee for vendors delivering appliances for the EmPower+ program will be \$75 starting with the release of the NYHEP, on July 10th.
- REA and Empower+ will be aligning assessment fees starting July 10th. Starting that day, an assessment will have a \$200 incentive.
- For Empower+ an additional \$100 will be provided if a blower door test is conducted.
- Energy Assessments must follow the protocols listed in the Program Manual.

# Questions?



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