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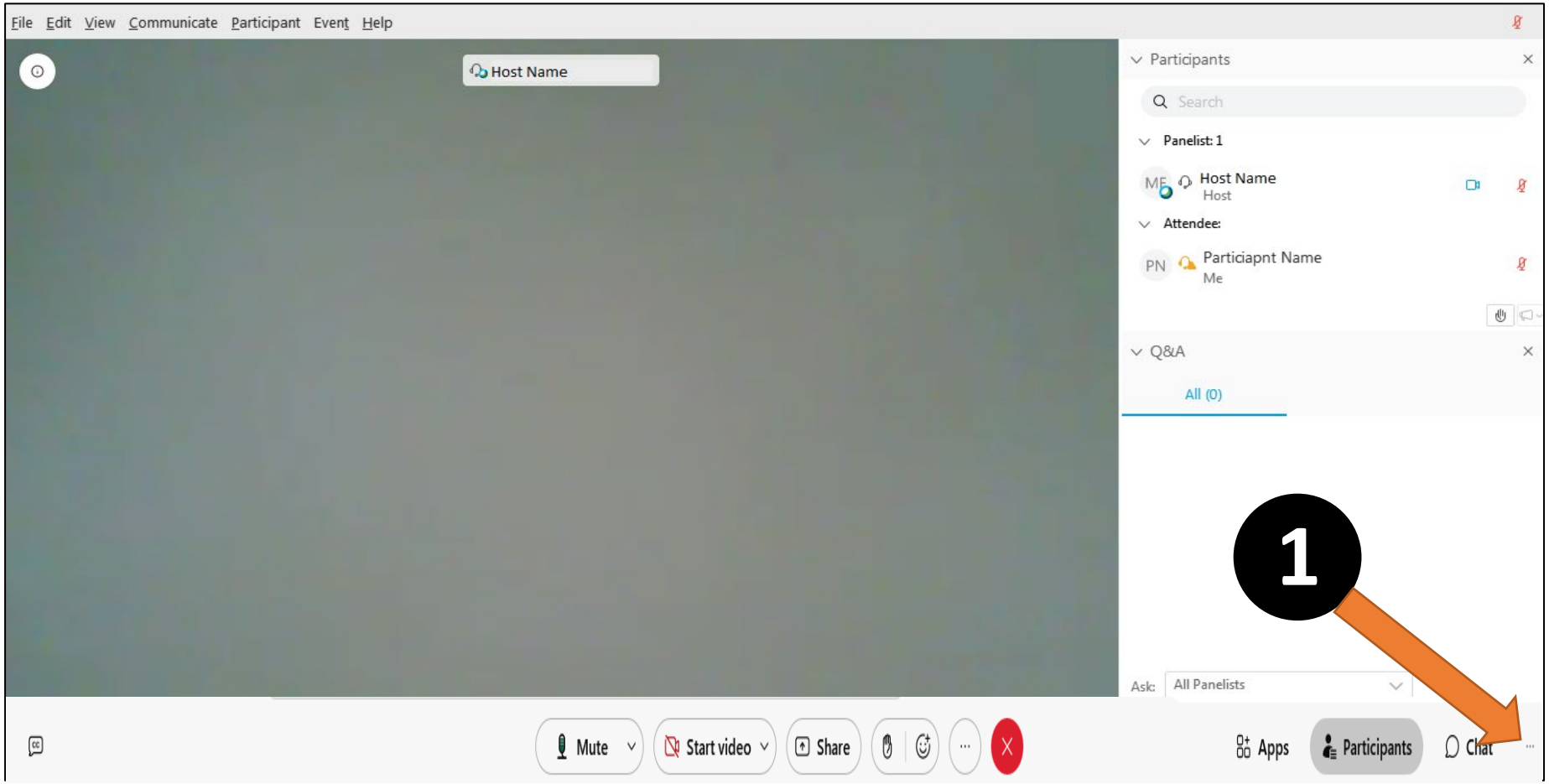
Options for Q&A During Today's Webinar - Text

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.

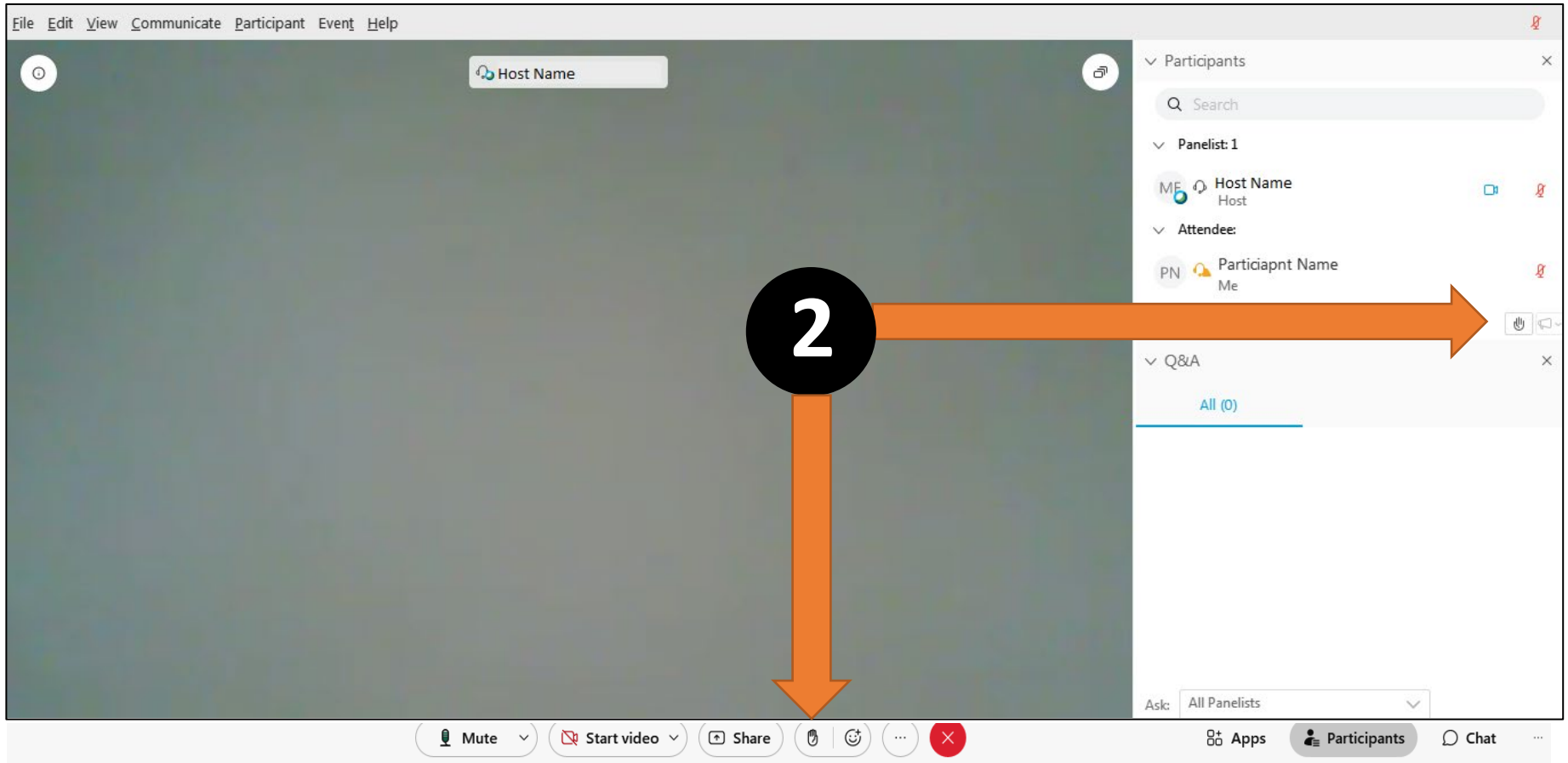
> Type your question into the text field and click "send."



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)

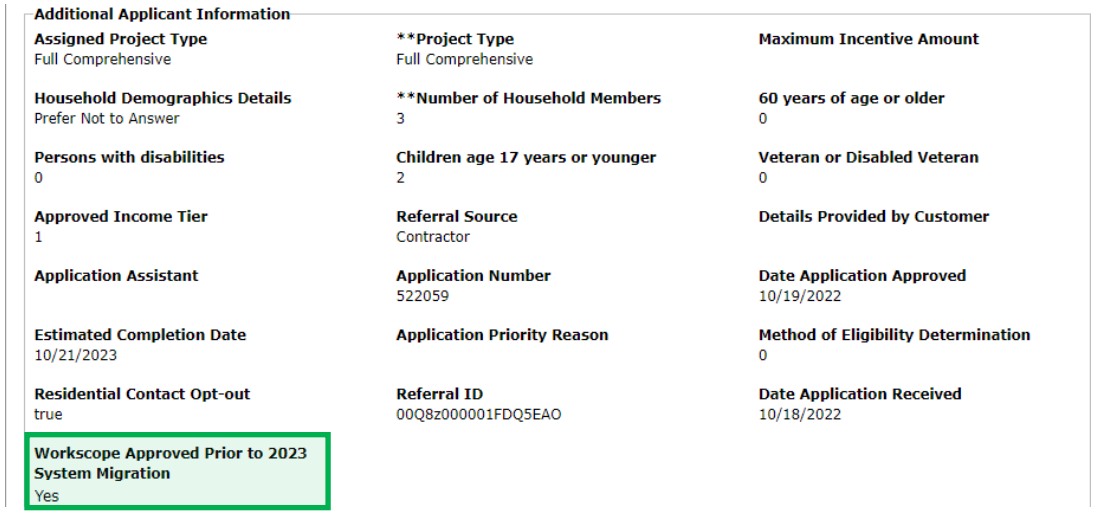
- A savings issue was identified during migration testing of in-flight projects that will require most projects at the Final Project Submission stage in Uplight to be migrated to Workscope Submission step in NY HEP.
- This occurs because EmPCalc and NY HEP have different data collection processes. In 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

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

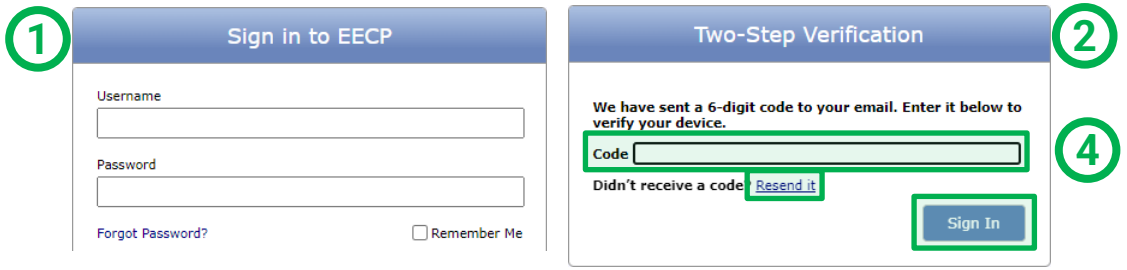
NY Home Energy Portal System Updates (3 of 6)

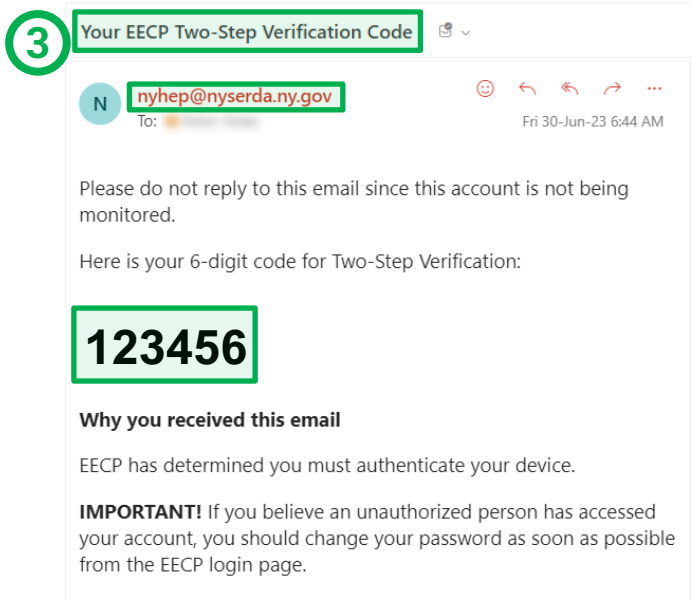
Multi-Factor Authentication Steps for NY HEP

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 EECP Two-Step Verification Code
   - Sender: 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
- Call toll free: (800) 284 – 9069

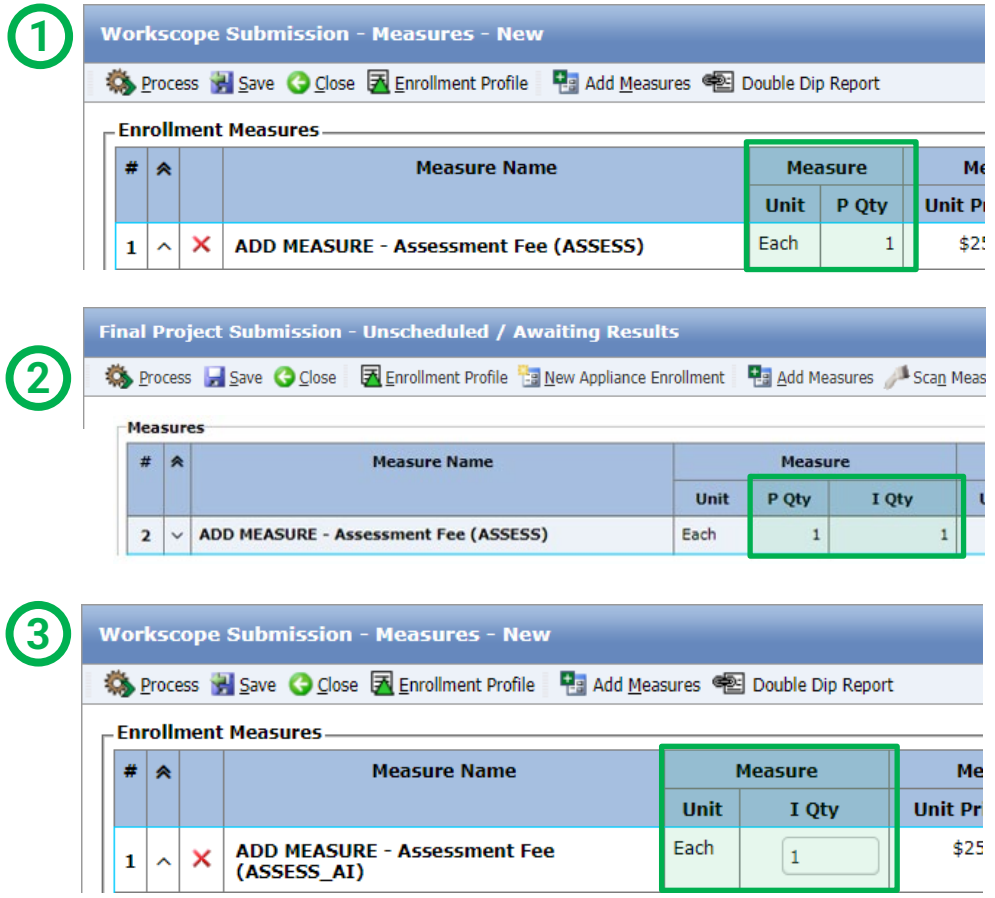




NY Home Energy Portal System Updates (4 of 6)

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.

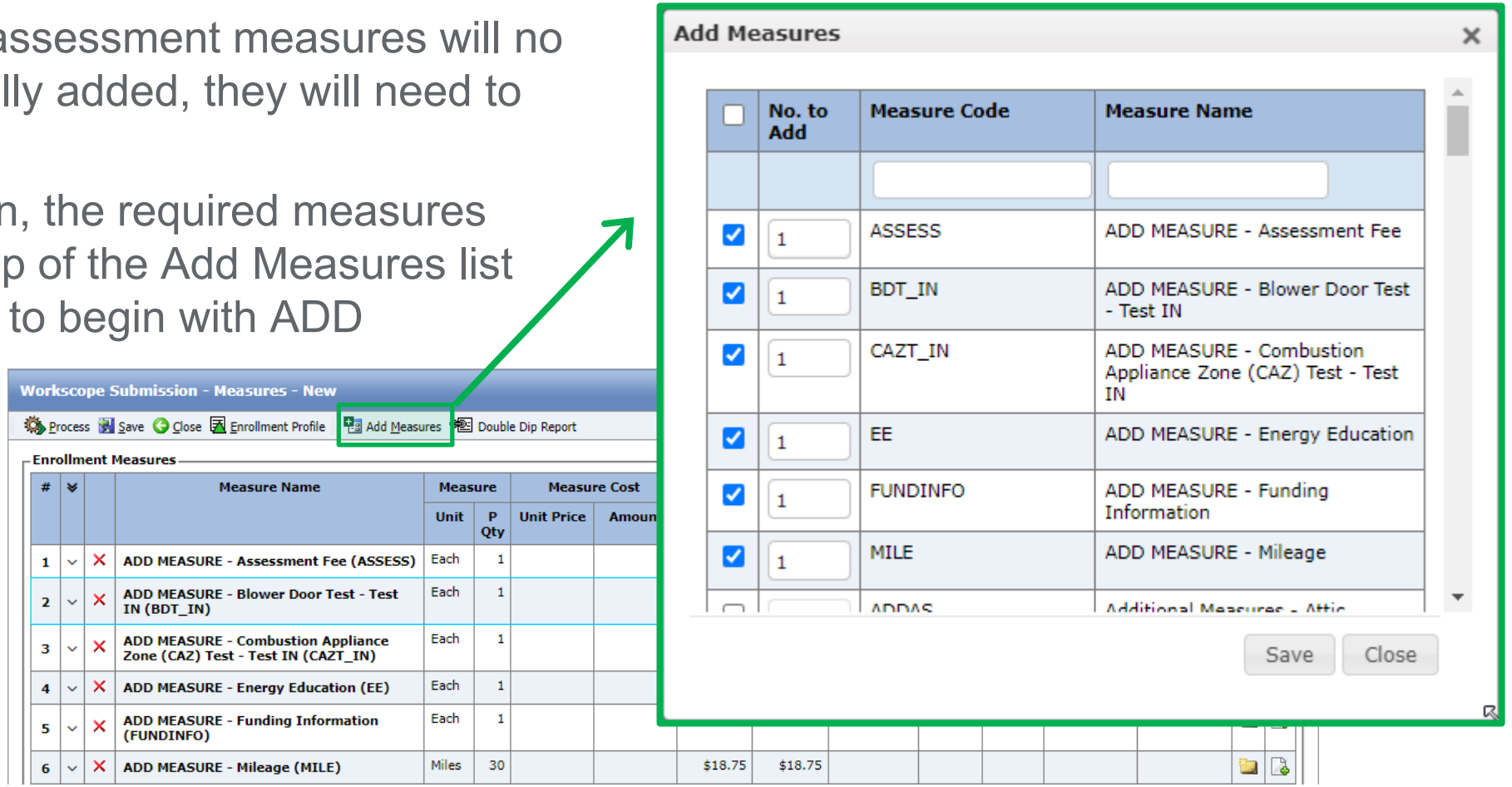


NY Home Energy Portal System Updates (5 of 6)

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

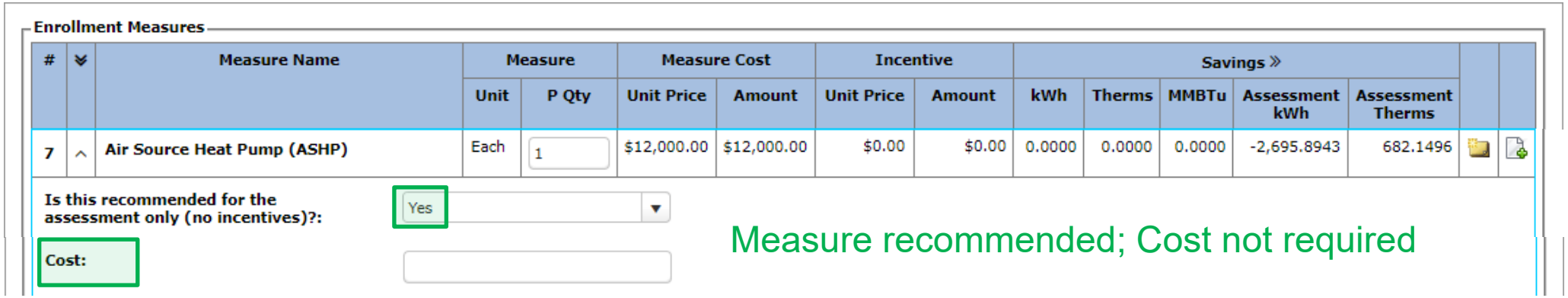
For easy identification, the required measures were moved to the top of the Add Measures list pop up and renamed to begin with ADD MEASURE…

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



NY Home Energy Portal System Updates (6 of 6)

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



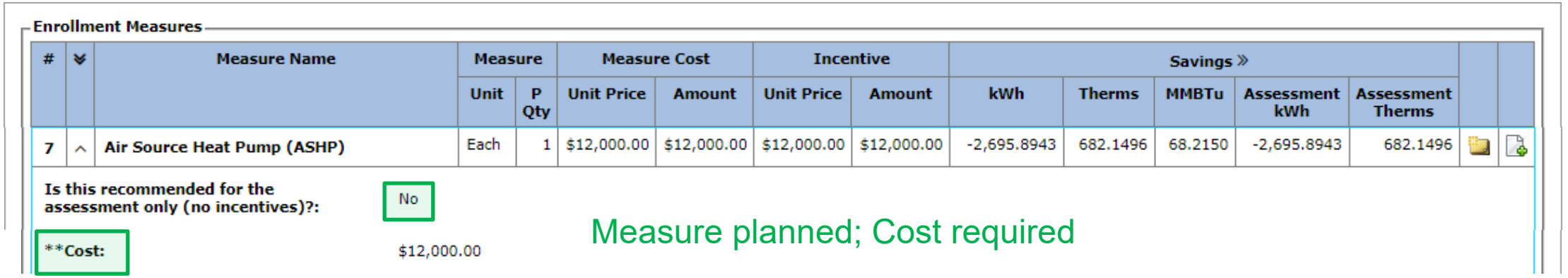
Enrollment Measures

#		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		

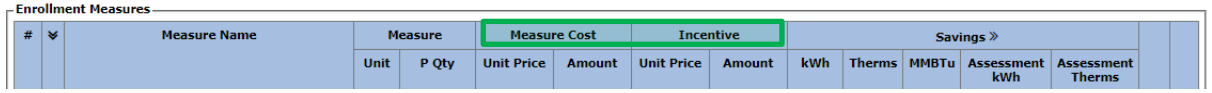
Is this recommended for the assessment only (no incentives)?: No

**Cost: $12,000.00

Measure planned; Cost required

NY Home Energy Portal
Measure tab: Key Fields

Header Fields



- 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
- Alternate Funding: Non-NYSERDA program rebates or incentives

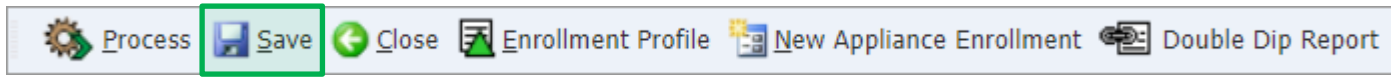
Funding Information (FUNDINFO)

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)

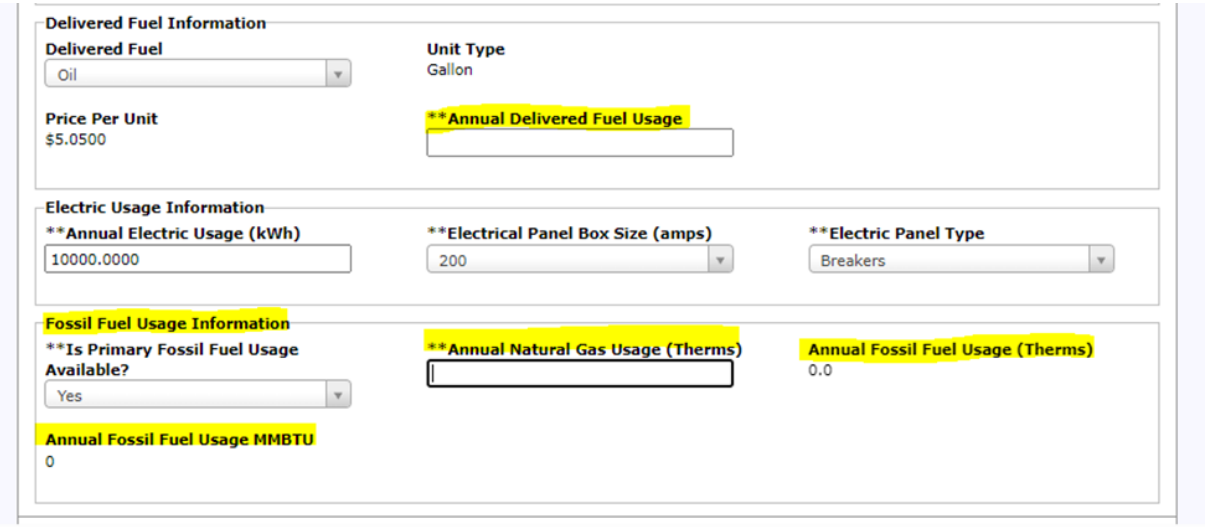
- Save #1: Updates the Measure
- Save #1.5: Needed if a measure is dependent on another measure (*i.e.,* heating/cooling system or water heater)
- Save#2: Updates the Totals in the Funding Information (last measure in list)

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.**"

Contractor Support Website – Forms Update – EmPower+ Data Collection Form

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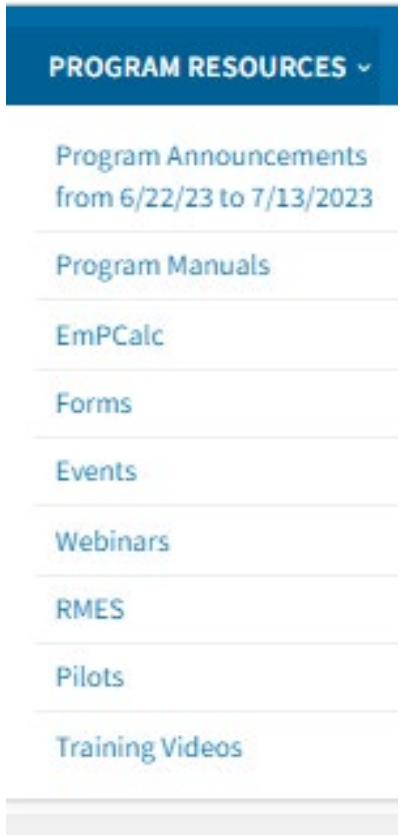
Contractor Support Website Update

- The Forms section on the Contractor Support Website has been updated.
- The EmPower+ Data Collection Form as 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
Office Hours #13	Tue, July 11, 9-10 AM	All workflows
Office hours #14	Wed, July 19, 3-4 PM	All workflows
Office Hours #15	Thu, July 27, 9-10 AM	All workflows
Office Hours #16	Tue, Aug 1, 3-4 PM	All workflows
Office Hours #17	Wed, Aug 9, 9-10 AM	All workflows
Office Hours #18	Thu, Aug 17, 3-4 PM	All workflows
Office Hours #19	Tue, Aug 22, 9-10 AM	All workflows
Office Hours #20	Wed, Aug 30, 3-4 PM	All workflows

Key Dates
EmPower+ & REA

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Key Dates: EmPower+

June 23
Applications in Salesforce Held for New Portal

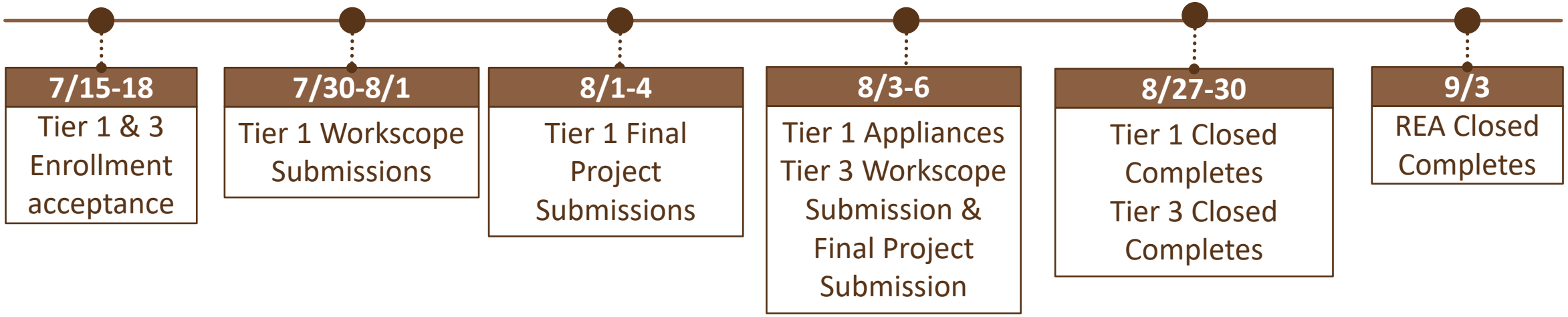
Jul 07
Contractor Access to Uplight Closed All Projects Must be Updated by 5PM

Jul 10
NYHEP Opens & Applications Held from Salesforce Migrate
*Reminder to log-in and accept enrollments

Jul 12
Payments of All Uplight Closed Projects

Jul 18
Payments Begin of Projects Completed in NYHEP

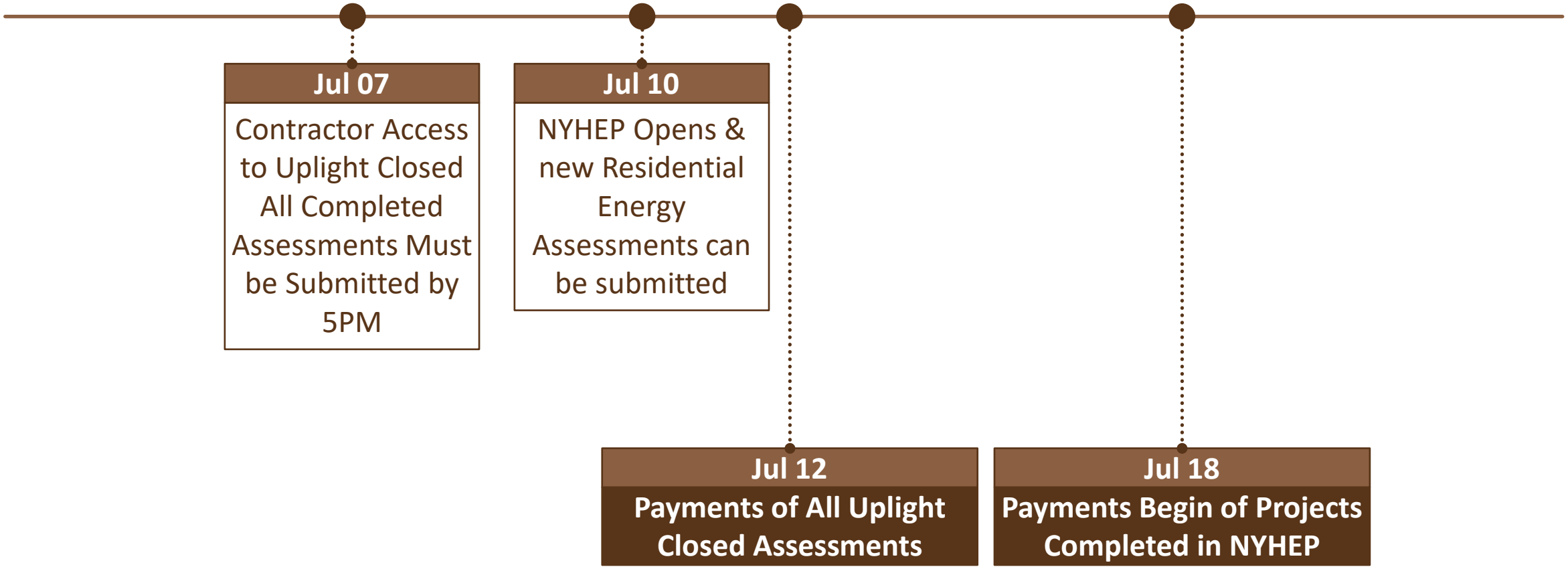
Project Migration Dates: EmPower+ and REA



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

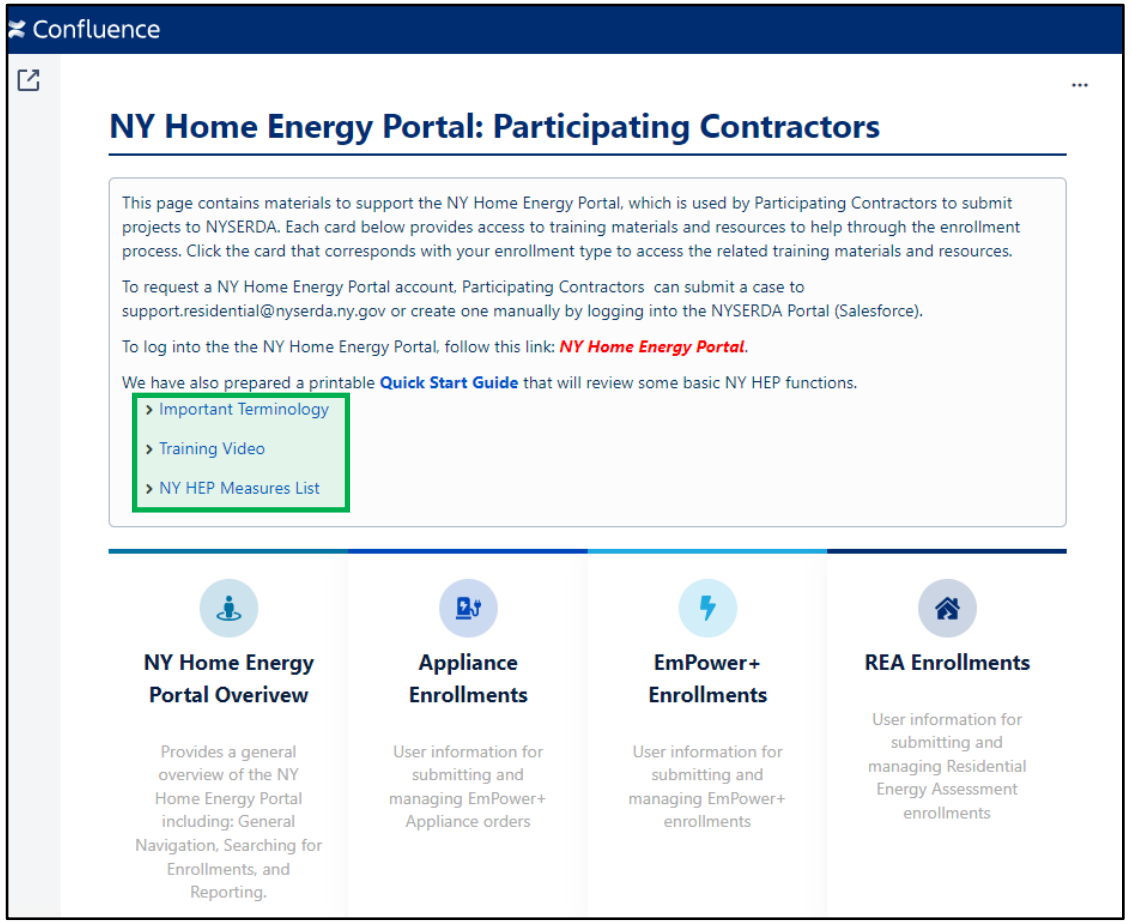
https://knowledge.nyserda.ny.gov/pages/viewpage.action?pageId=142641274

- **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

Residential Energy Assessment (REA) Program: homeaudits@nyserda.ny.gov



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
   - 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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