# Single Family Residential Program Update

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### EmPower+

August 4, 2023



### 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.Revised Data Migration Timeline
2.Low Income/ Moderate Income Terminology
3.Refrigerator/Freezer Replacement Age Update
4.NYHEP Forms overview
5.NYHEP Updates
6.NYHEP Training Resources



# Data Migration Progress Update



### 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.

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

# Low Income/ Moderate Income Terminology



### Terminology

- In the EmPower+ Program Manual, the terms "Low-income" and "Tier 1" are used interchangeably as are the terms "moderateincome" and "Tier 3".
- When discussing income levels and incentives with customers, please use only the terms low-income and moderate-income. The Tier structure is for internal program use **only**.

# **Refrigerator/Freezer Replacement Eligibility Update**



## EmPower+ Measure Update Refrigerator/Freezer Replacement Age (1 of 2)

Effective August 4, 2023, refrigerators and freezers must be older than 2011 to be replaced in EmPower+.

Status	Time Frame Eligibility	Minimum Efficiency Requirements	Prequalified	Incentive Cap (Tier 1/Tier 3)
New Requirement	Requirement 8/4/2023 or later	Existing appliance older than 2011. ENERGY STAR Qualified.	Yes	NA/\$400
Previous Requirement	Before 8/4/2023	Existing appliance greater than 10 years old. ENERGY STAR Qualified.	Yes	NA/\$400

- The change aligns with appliance age ranges in the NYS Technical Resource Manual.
- The NY Home Energy Portal was configured with this rule.
- Program will be providing a 30-day (September 4, 2023) grace period to submit any appliances that are over 10 years old but not older than 2011.

## EmPower+ Measure Update Refrigerator/Freezer Replacement Age (2 of 2)

Contractors should use the existing exception request process in the Appliance Enrollment step to submit refrigerator and freezers during the 30-day grace period that ends September 4, 2023.

Appliance Request – Applicant Information

**General Application Information section** 

- Exception Request Type field = Other
- Exception Request Note field = Statement indicating that the refrigerator or freezer is over 10 years old

Application Date	Refere	nce Number					
08/04/2023 🥩	10030	1003001					
Project Description							
Exception Request Type		Exception Request Notes					

# NY Home Energy Portal EmPower+ Forms System Updates & Reminders Training Resources



# EmPower+ Forms Updates (1 of 3)

#### New or Updated

- All forms updated with EmPower+
   name
- Customer Report
  - New replaced Audit Report from EmPCalc v8
  - Replaces all other energy modeling tool audit reports previously accepted
- Assessment Installation Form
  - Renamed Audit & Direct Install Certification of Completion
  - Required on all enrollments
- Invoice ProForma Report
  - New based on *Summary Report* from EmPCalc v8)
  - o aka Contractor Invoice
- o Clean & Tune Checklist
  - $\circ$  Required when measure installed

#### Optional

- Notification of Possible Asbestos Form
- Initial Interview Form
- Combustion Appliance Form

#### Discontinued

- EmPCalc & other energy modeling tools
- Certificate of Completion: Post-Installation Health and Safety Test Results
- Optional Field Data Form
- Supplemental Data Collection Form
- All forms referencing EmPower and/or Assisted Home Performance must be phased out

## EmPower+ Forms Workscope Submission (2 of 3)

	Homeowner		Landl	ord		
Workscope Submission Documents	Full Comp Muni Install	Audit Install	Full Comp Muni Install	Audit Install	Source	Note
Assessment Installation Form					NY HEP	Replaced Audit & Direct Install Certificate of Completion
Homeowner Agreement	•	n/a	n/a	n/a	Program Manual 3.10	Owner occupied enrollments
Landlord Agreement (aka Rental Property Energy Efficiency Services Agreement)	n/a	n/a	•	n/a	Program Manual 3.9	Tenant occupied enrollments
Proof of Ownership	•	n/a	•	n/a	Homeowner   Landlord	Deed, Property Tax Bill, Mortgage Statement, Bill of Sale, Homeowners Insurance
Electric Bill	•	•	-	•	Customer	Utility bill(s); recent 12 months or length of time in dwelling
Natural Gas Bill or Usage Waiver (Delivered Fuels)	•		-	•	Customer	Usage waiver should only be used for delivered fuels
House Diagram			-		Program Manual 8.0	Diagram does not need to be on Program document
Appliance Exchange Agreement					Program Manual 8.0	Required. Submit on Appliance enrollment when proposing upgrade; otherwise submit on EmPower+ enrollment
Workscope Submission Photos	•	•	-	•	Program Manual 8.0	Photos of dwelling, proposed measures, exception requests
Customer Attestation (Heat Pump Information Form)		n/a		n/a	Program Manual 5.10	Only required for enrollments with ASHP/GSHP measures
NEC Calculation Worksheet		n/a		n/a	Program Manual 5.10	Required when proposing an upgrade to a panel box
AHRI Certificate   NEEP Cold Climate Spec Sheet		n/a		n/a	AHRI   NEEP	Only required for enrollments with ASHP/GSHP measures
SHPO Form		n/a		n/a	Program Manual 8.0	Only required when SHPO approval needed
Initial Interview Form	¢	¢	¢	¢	Program Manual 8.0	
Notification of Possible Asbestos Form	¢	¢	¢	₽	Program Manual 8.0	Notifies customer when possible asbestos noted in home
Supporting Documentation	\$	¢	¢	¢		

### EmPower+ Forms Final Project Submission (3 of 3)

	Homeowner		Landl	ord		
Final Project Submission Documents	Full Comp Muni Install	Audit Install	Full Comp Muni Install	Audit Install	Source	Note
Pre-Installation Agreement Form		n/a		n/a	NY HEP	Required if any measure other than DI measures were proposed; Approved workscope signed by customer before work starts
Post Installation Measure Report		n/a		n/a	NY HEP	Required if any measure other than DI measures were proposed; Installed workscope signed by customer after work completed
Signed Contract		n/a		n/a	Contractor	Required for all customer contributions
Field Change Order		n/a		n/a	Program Manual 8.0	Required for all workscope changes after approval
Final Project Submission Photos					Contractor	Photos of installed measures
Contractor Attestation (Certificate of Completion - LMI Heat Pump Projects)		n/a		n/a	Program Manual 8.0	Required for enrollments with ASHP/GSHP measures
Clean and Tune Checklist		n/a		n/a	Program Manual 8.0	Required when Clean & Tune measure proposed
Contractor Invoice (Invoice ProForma Report)	-	•	•	•	NY HEP or Contractor	Invoice from contractor must contain same information as NY HEP generated document
Subcontractor Invoice					Contractor	Only required subcontractor installed measure(s)
Supporting Documentation						
AHRI Certificate   NEEP Cold Climate Spec Sheet					AHRI   NEEP	Required for enrollments with ASHP/GSHP measures, if not previously submitted at Workscope Submission step
Appliance Exchange Agreement					Program Manual 8.0	Only required if no Appliance enrollment initiated and not previously submitted at Workflow Submission step

■ – Required □ – As Needed ○ – Optional n/a – Not Applicable

## NY Home Energy Portal System Updates (1 of 6)

Significant updates since launch on July 10th.

- 1. Ability to model 3" ccSPF on Rim Joist for Mobile Home.
  - Can only propose for Mobile Homes (validation message will appear if used elsewhere).
- 2. Assessment Installation Form all Direct Install measures will now populate when proposed.
- 3. Invoice ProForma Report (Contractor Invoice) all data populating.
  - NYSERDA Financing developing how to document for use with online ProForma tool. A link will be posted on the Contractor Support site.
- 4. Issue causing random workflow steps to duplicated has been identified and will be resolved soon. In the meantime, these are being triaged and corrected by Launch daily.
- 5. Changing employee assigned on enrollment workflow step.
- 6. Migrated enrollments may be blank or show a Maximum Incentive amount of \$0.00 as it is a new field being populated in Salesforce.
- 7. A line item was added to the Funding Information (FUNDINFO) measure named "Health & Safety Towards Prequalification".

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

On the EmPower+ Workscope Submission, the REA Assessment Submission, and Appliance Request steps

1. On the Applicant Information tab (the first tab), scroll down to the "Trade Ally Information" section and click either the "Trade Ally" or "Employee" hyperlink

rade Ally Information Trade Allies									
	Primary	Trade Ally	Туре	Employee	Phone	Email			
	Yes	Test Contractor	Contractor	Employee, One	(737) 437-4374	ecollins@launchcg.com			
Add Remove Add New									

2. Select the desired Employee in the dialogue box and click "Save", the change will occur after a few seconds.

Add Trade Ally	×							
Primary		-Trade Trad	Ally Informati e Allies	on				
Trade Ally			Primary	Trade Ally	Туре	Employee	Phone	Email
Test Contractor			Yes	Test Contractor	Contractor	Employee, Two	(485) 834-8458	ecollins@launchcg.com
Employee Employee, One (Click to Select) Employee, One Employee, Two		Add	Remove	Add New				·
Save	ancel							

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

On the EmPower+ Final Project Submission and the Appliance Invoice Submission steps

1. On the Workflow Step Detail tab (the first tab), expand the Employee dropdown and select the desired Employee.

🆏 Process 🚽 Save 🔇 Close	🛃 Enrollment Profile  🛅 New Appliance En	rollment 🛛 📳 Add Measures 🄑 Sca <u>n</u> M	easures 🔤 Calendar 🗨	Double Dip Report	
Visit Information	Assign To ()	Employee	Outcome	Reason	
Scheduled Date Start Tim Actual Visit Date Time In 07/30/2023	Time Out hours	Employee, One (Click to Select) Employee, One Employee, Two	On Hold	(Click to Select)	¥

2. Click "Save".

	Save Process	🗿 Close 🛛 🛃 Enrollment Profile 🏻 🗄	New Appliance Enroll	nent 🛛 📲 Add Measures	/ <sup>14</sup> Sca <u>n</u> Measure	es 🔲 Ca <u>l</u> endar 🗨	Dou <u>b</u> le Dip Report	
[	Visit Information							
	Due Date	Assign To 🕕		Employee		Outcome	Reason	
	06/16/2023	Test Contractor	v	Employee, Two	<b>v</b>	Work Complete	(Click to Select)	Ψ.
	Scheduled Date	Start Time Duration Time In Time Out Drive Time 0.00 hours				Ocancel Oon Hold		

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

Migrated enrollments may be blank or show a Maximum Incentive amount of \$0.00 on the Applicate Information tab as it is a new field being populated in Salesforce. Unless otherwise noted the maximums will be \$10,000 for Tier 1 and \$5,000 for Tier 3 enrollments.

Additional Applicant Information							
Assigned Project Type Full Comprehensive	** <b>Project Type</b> Full Comprehensive	Maximum Incentive Amount					

New projects will include a Maximum Incentive amount that incorporates a customer's incentives for the past 3 years.

Additional Applicant InformationAssigned Project Type\*\*Project TypeFull ComprehensiveFull ComprehensiveState\$10,000.00

## NY Home Energy Portal System Updates Changing Account Numbers (5 of 6)

A customer's electric utility number is used as the Account #. When it is not known the NY HEP system will create one that begins with 99999. Use the steps below to change the Account #.

- 1. From the enrollment profile, click the hyperlinked Account #.
- This will take the user to the Customer Account. Click Replace Account Number button from the menu at the top of the page.
- 3. In the dialogue box that pops up enter the customer's electric utility number and click the "OK" button.

DO NOT MANUALLY ENTER THE ACCOUNT NUMBER DIRECTLY INTO THE BILLING ACCOUNT #. THIS WILL UNLINK THE CUSTOMER ACCOUNT FROM THE ENROLLMENT.



## NY Home Energy Portal System Updates New Funding Information Line Item (6 of 6)

A line item was added to the Funding Information (FUNDINFO) measure named "Health & Safety Towards Prequalification".

This is the total amount of health and safety costs that count towards Tier 1 and 3 caps (\$1000/\$500) when determining an enrollments prequalification.

20	^	ADD MEASURE - Funding Informa (FUNDINFO)	tion	Each		
То	Total Utility Funding: \$0.00					
То	tal ۱	WAP Funding:	\$0.00			
То	tal 3	3rd Party Funding:	\$0.00			
То	tal (	Customer Contribution:	\$0.00			
En Au	nPov dit,	\$13847.	\$13847.87			
En Au	nPov dit,	\$11078.	30			
He Pre	alth equ	1 & Safety Towards alification:	\$447.01			
То	tal I	Lifetime Dollar Savings:	\$40207.	99		
Pa Eff	sse fecti	Yes				
Additional Funding Requested Above Maximum Incentive Amount:			\$3847.8	\$3847.87		

# **NY Home Energy Portal Training Resources**



### NYSERDA Knowledge Base

#### NY Home Energy Portal: Participating Contractors



### NYSERDA Knowledge Base

#### **NY Home Energy Portal Overview**



## **Training Videos**

2023

Late

June/July2023

August 2023

• Unedited raw footage of a training session posted for quick reference and homework assistance.

- Getting to know the system
- Raw footage removed once video snippets and screenshots were added to the step-by-step instruction guides.
- Increased comfort level with the NY Home Energy Portal

- A series of end-to-end videos are being produced for long-term training needs
- Day-to-day training for new and refresher for existing staff

### **Still Need Assistance?**

. EmPower+: Reach out to your Account Manager or <u>support.residential@nyserda.ny.gov</u>

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

# **Questions?**

