Single Family Residential Program Update

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EmPower +

October 6, 2023
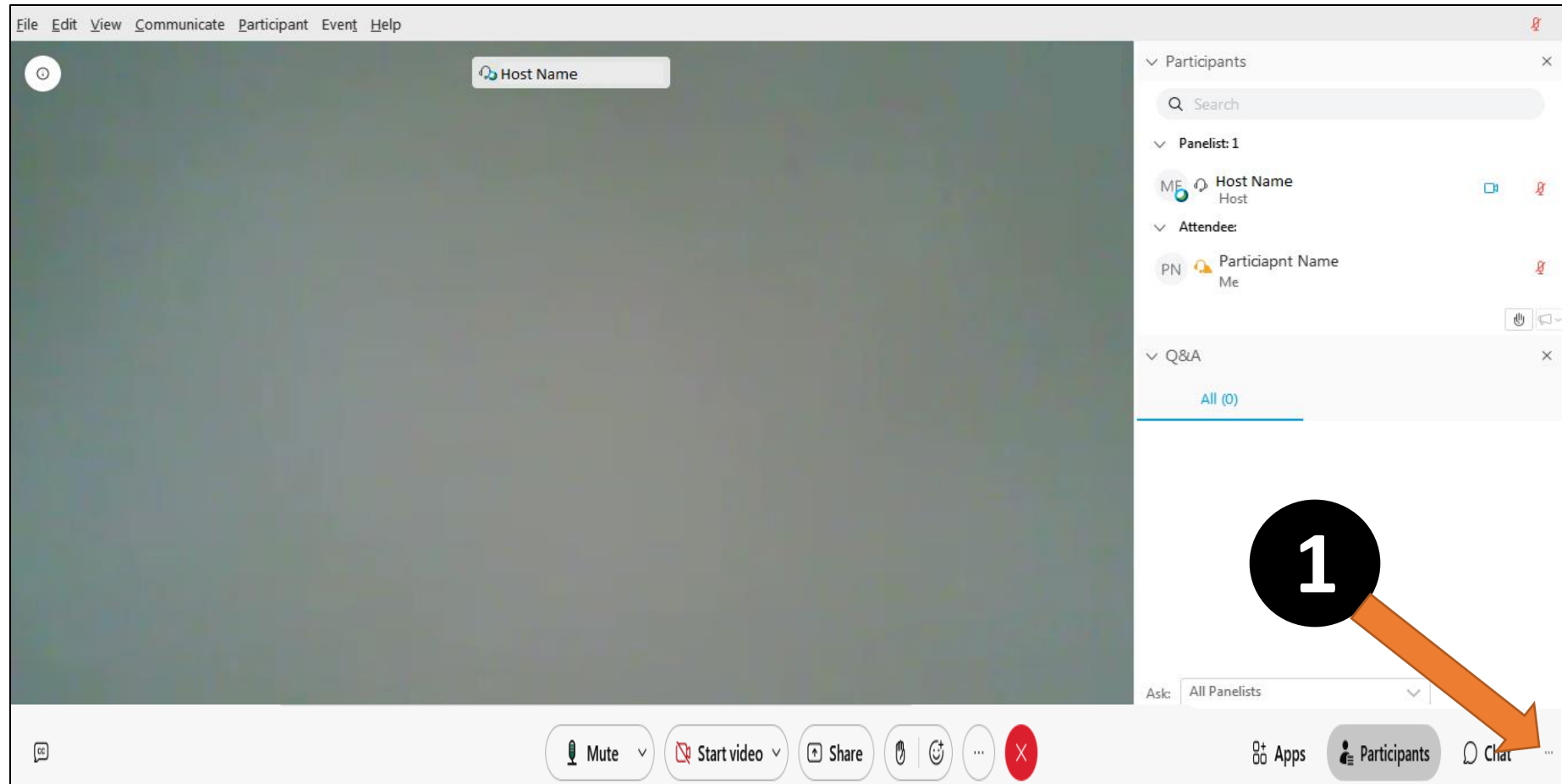
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OPTION 1 - TEXT

> 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.

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> Open your participant panel using the circular icon near the bottom of your screen.

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> Click on the raise hand icon to let us know you have a question.

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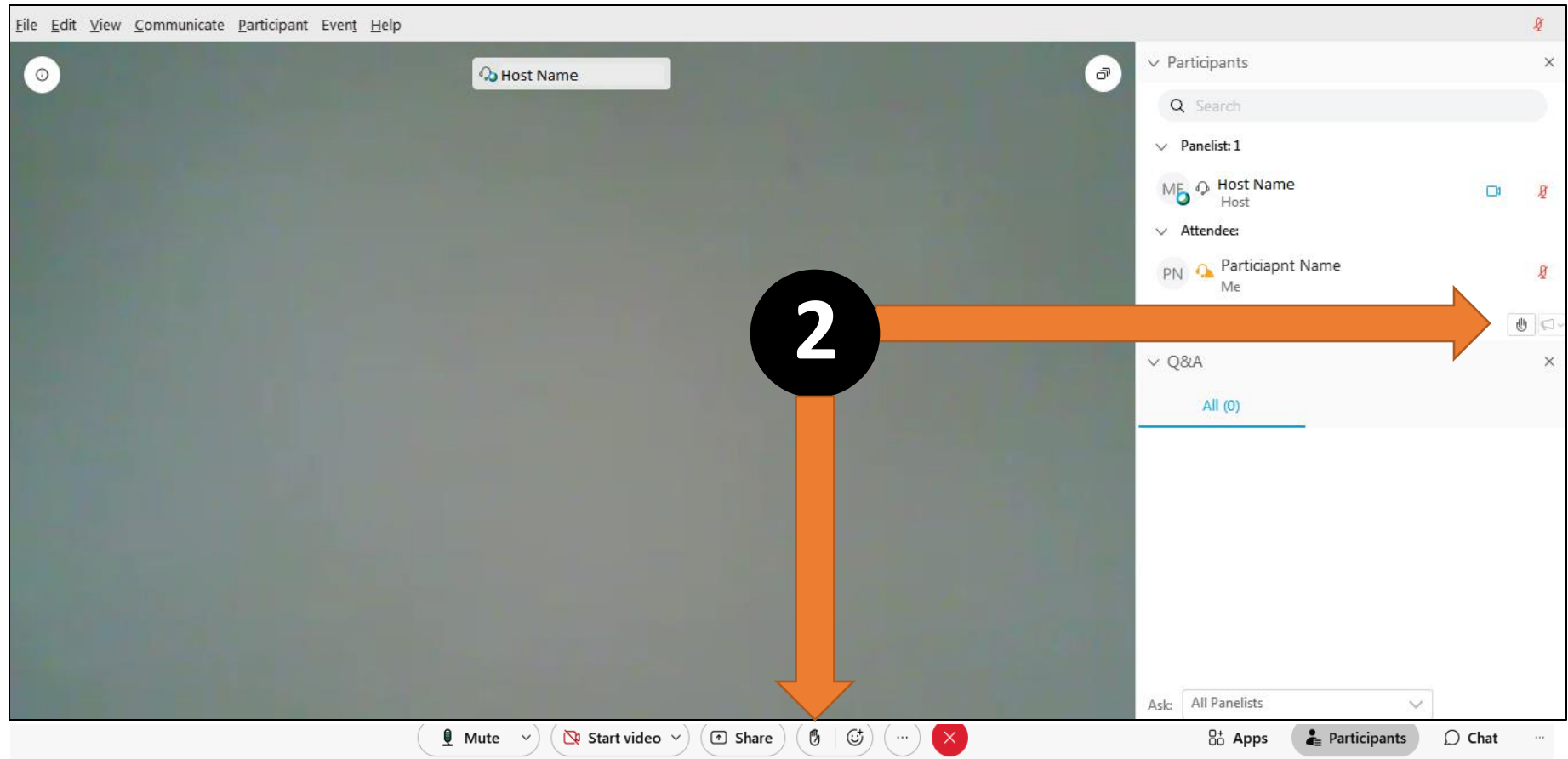
Agenda

1. No-Heat process
2. BPA Conference
3. Building Electrification Training
4. NYHEP Processing Speed Update
5. HEAP Dates
6. OTDA 2023 Funding Update
7. OTDA applications
8. NYHEP project reopening process

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No-Heat Guidance

EmPower+ No Heat Process

- Section 5.9 Program Manual

- Empower+ can provide assistance to customers in no-heat situations but the program is not designed as a no-heat program. The OTDA Heating Equipment Repair or Replacement Program opens on October 2 and should be the first referral for customers.

- No-heat equipment replacement project incentives are available up to the program heating incentive caps for Tier 1 (Low-Income) and Tier 3 (Moderate-Income) projects referenced below.
    - Tier 1 (Low-Income) - Furnace-Not to exceed $6,000 per system
    - Tier 1 (Low-Income) - Boiler- Not to exceed $10,000 per system
    - Tier 3 (Moderate-Income) - Furnace/Boiler $2,000 per heating system

EmPower+ No Heat Eligibility

- Ineligible or were denied HERR funding.

- October 1, 2023 through to May 31, 2024.

- Primary Heating Systems only

- Failure must be during current heating system

- At a primary residence of an income qualified customer

- Owner/Occupied homes only

- System must be deemed unsafe to operate and be non-repairable

EmPower+ No Heat Eligibility (other)

The household is owner occupied, is Tier 1 (Low-Income) income eligible and meets one or more of the following criteria (the below are conditions that would trigger a HERR denial letter):

1. Applicant has lived in the home less than 12 months preceding the month of application

2. Applicant has owned the home less than 12 months preceding the month of application

3. Dwelling is a 3- or 4-unit home

4. Heating equipment is inoperable due to flood, fire, or other natural disaster

5. Household is switching primary heating system from delivered fuels to heat pump technology

No-heat ineligible projects

- Primary system has been disabled for 12 months or more and there is an alternative heating source

- There is no immediate need for heat (request is outside heating system)

- The operation of the existing heating equipment poses no immediate health and safety concerns

- Dwelling does not have an existing heating system

- The home was purchased/rented without an operational heating system

- Home is rental unit and owner is not income eligible or building is not owner-occupied

- The customer is a customer of National Fuel Gas (NFG) *NFG customers should reach out first to NFG in the event of a no-heat situation at 716-686-6123 M-F 7am-6pm or call the emergency line at Emergency line at 1-800444-3130 which is available 24/7.

# Project Submission Requirements

- Participating Contractor must provide an explanation on why the heating system is non-repairable. If a failed heating system can be made operational again and serve the household for additional years to come, an attempt should be made to repair it.

- When scoping a no-heat project, the Participating Contractor should prioritize upgrading the existing heating system with heat pump technology. Program will consider heat pump replacement costs which exceed existing project caps. In the event heat pump technology is significantly cost prohibitive or otherwise infeasible, the existing fossil fuel heating equipment can be replaced with fossil fuel heating equipment. The heat pump installation must meet all Program requirements. Please see Section 5.6 and 5.10 of the Program Manual for additional information on heat pump installations.

- The defective heating equipment must be replaced with equipment identified on the current eligible measures list.

- All no-heat projects must be submitted to the Program and approved prior to work taking place in accordance with the project submission process.

BPA Conference

SAVE THE DATE

BPA PRESENTS
THE CLEAN ENERGY FOR HOMES
CONFERENCE & TRADE SHOW

FEBRUARY 13-14, 2024
SARATOGA SPRINGS, NY
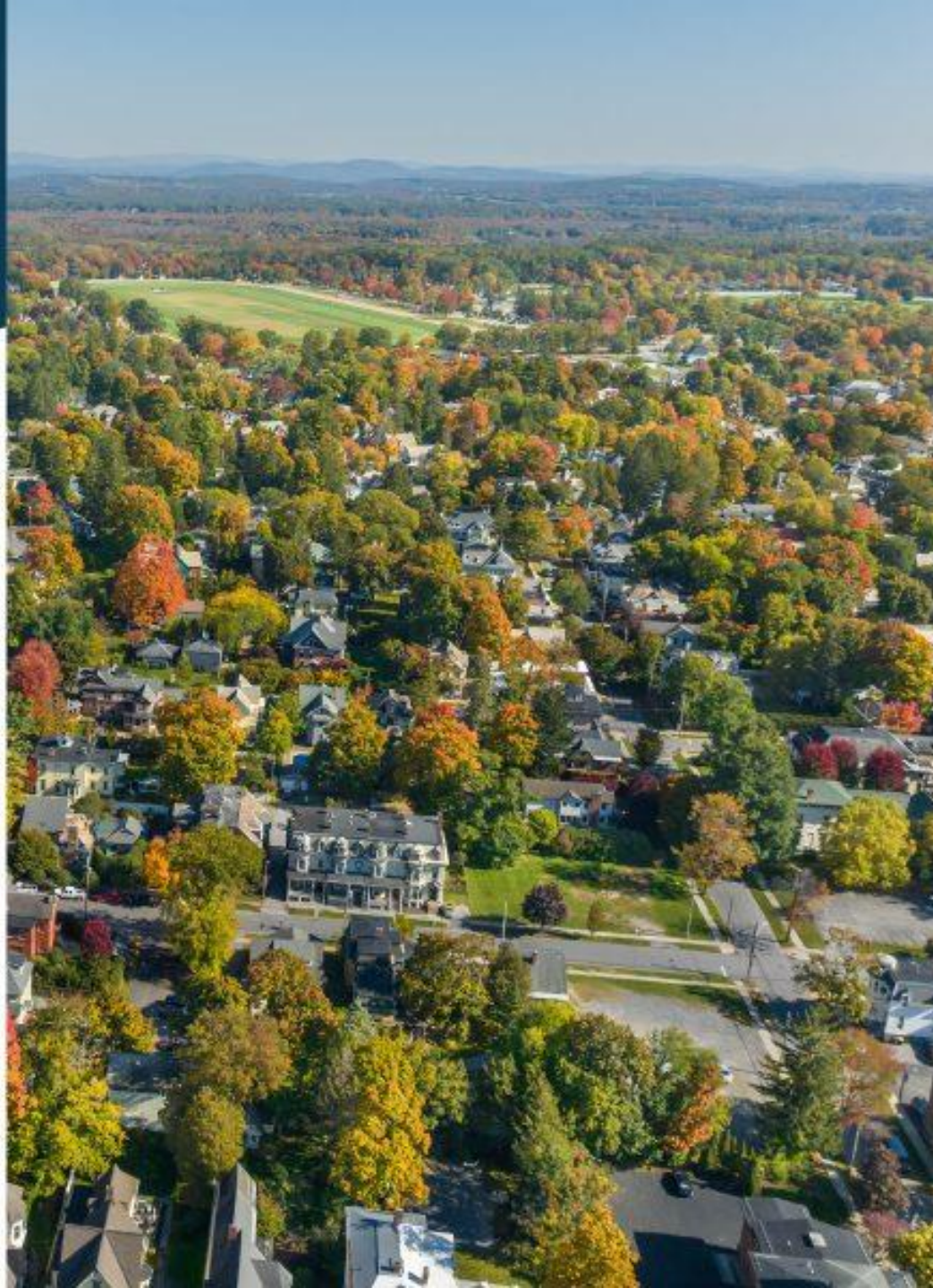
BPA is currently accepting proposals to present at this conference until October 24, 2023.

Learn more at: https://building-performance.org/events/calendar/2024-clean-energy-for-homes-conference-trade-show/

Building Electrification Training

Building Electrification trainings

New York State Energy Research and Development Authority (NYSERDA) is offering free online Building Electrification Training through the Steven Winter Associates Academy. The training features seven stand-alone courses on topics related to the electrification of space heating in buildings. Some courses focus on residential buildings while others discuss commercial settings.

Continuing Education Units (CEUs) are available for each training.

Enroll in as many trainings in the series as you would like. The registration fee is waived for New York State residents and New York State businesses (fees may apply if you are a non-resident).

Enroll for Trainings   https://www.swinter.com/electrification-training/

These recorded trainings are available to be taken on demand to fit your schedule. Preview the commercial and residential courses and their associated descriptions on the registration webpage.

NYHEP Performance Root Cause Analysis

- **Identified 8 queries** to revise to improve performance
  - Get Enrollment Measure Details by workflow step
  - Save Enrollment Property
  - Save Enrollment Signature
  - Save Enrollment Note
  - Get Grid measures
  - Save Program Inspection Threshold
  - Save Program QA Threshold
  - Save Program Engineering Threshold
- **A query** is an action performed by software to look up data, perform calculations, populate fields with data, etc.
- **One example:** Users navigating back to a previous page quickly to click 'save' or 'process' again backs the system up with duplicate requests.

NYHEP Performance

- **Timeline**
  - All 8 identified queries ready for NYSERDA testing by 11/17/23
  - Goals
    - Fix all queries and push results to production by 12/01/23
    - Complete further database assessment by 12/15/23
- **Expectations**
  - There may be intermittent system slow-downs until 12/01/23

NY Home Energy Portal System Updates Changing Employee Assigned

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

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

If a Primary is removed, a new on will need to be added.

Reopening Closed Enrollments to Add Measures

The process outlined is for *adding* measures to a closed enrollment at Funding Allocations workflow step. This may occur if a measure had not been included by the contractor or additional work was required to address an issue identified during a Quality Assurance inspection. *Program will share additional information how to remove measures (partially or completely) in upcoming communications.*

1. Contact Contractor Support requesting the project to be reopened because the measure was not on the original invoice.
   - Email: support.residential@nyserda.ny.gov
   - Call toll free: (800) 284 – 9069
2. Program will reopen the enrollment and it will appear at Final Project Submission under Additional Workflow.
3. On the Notes tab, there will also be a note related to the added measure request.

Workflow Step	Trade Ally	Disposition / Status
Enrollment		
Contractor Assignment	Unassigned	Closed - Work Completed
Enrollment Acceptance		Closed - Accepted
Workscope Submission		Closed - Work Completed
Pre-Engineering		
Workscope Review	CLEAResult	Closed - Work Completed
Secondary Review	CLEAResult	Closed - Work Completed
Tertiary Review	NYSERDA	Closed - Work Completed
Enrollment		
Final Project Submission		Closed - Work Completed
Inspection		
Final Project Review	CLEAResult	Closed - Work Completed
Post-Engineering		
Final Technical Review	CLEAResult	Closed - Work Completed
Funding Allocations	CLEAResult	Closed - Work Completed
Additional Workflow		
Final Project Submission		**Open - Unscheduled / Awaiting Results**

This Final Project Submission workflow step will have no measures visible.

4. Select *Employee* and click *Save* on the top menu bar.
5. Click *Add Measures* on the top menu bar and select only the measure(s) being added. Click *Save*. Do not add other measures unless directed by Program.
6. Upload an invoice for the added measure(s).
   - Can be generated via Reports tab>>Invoice ProForma Report
7. Click Process on the top menu bar. Read and sign the acknowledgement.

Reopening Closed Enrollments to Add Measures

Scenario: A change was needed prior to submission but was never included.

The original Final Project Submission had the attic at 1000 sq ft and the price was $2,670. At install it was discovered that it was actually 1100 sq ft and the price should be $260 more.

Add another Attic measure for 100 sq ft for $260. Only the difference between the new and original amount should be included on that added measure.

Home Energy Assistance Program (HEAP)

- 2023-2024 Regular HEAP is scheduled to open November 1, 2023.

- 2023-2024 Emergency HEAP is scheduled to open January 2, 2024.

- Heating Equipment Repair or Replacement Benefit is scheduled to open on October 2, 2023.

- Clean and Tune Benefit is scheduled to open on October 2, 2023.

- Cooling Assistance is scheduled to open on April 15, 2024.

- OTDA Hotline at 1-800-342-3009

2023 OTDA Funding Update

OTDA 2023 Funding

Complete Projects and Funding	986	$7,415,313
In progress with Workscope and Funding	2,033	$15,247,500
Required Projects to Hit 2023 Budget (based on $7,500 avg project $)	295	$2,209,060

Total of Completed and In-Progress: $22,662,813
OTDA23 Total Budget: $ 24,871,874.00
OTDA23 Remaining Unspent Budget: $17,456,560

All work for OTDA 2023 must be completed by September 15, 2024.

OTDA 2023 Update

Qualifying applicants for OTDA 2023 funding by HEAP or SNAP Award Letter ended on 9/15/2023. Applications had to be submitted by 9/15/2023 to be approved with the funding and max incentive of $20,000.

Going forward, qualification for the funding will be determined based on the applicant being referred directly to Program by OTDA. You'll be able to identify if they were approved for OTDA 2023 funding by reviewing the "Additional Applicant Information" section at Workscope Submission.

Questions?