

Single Family Residential Program Update

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***EmPower* +**

January 5, 2024

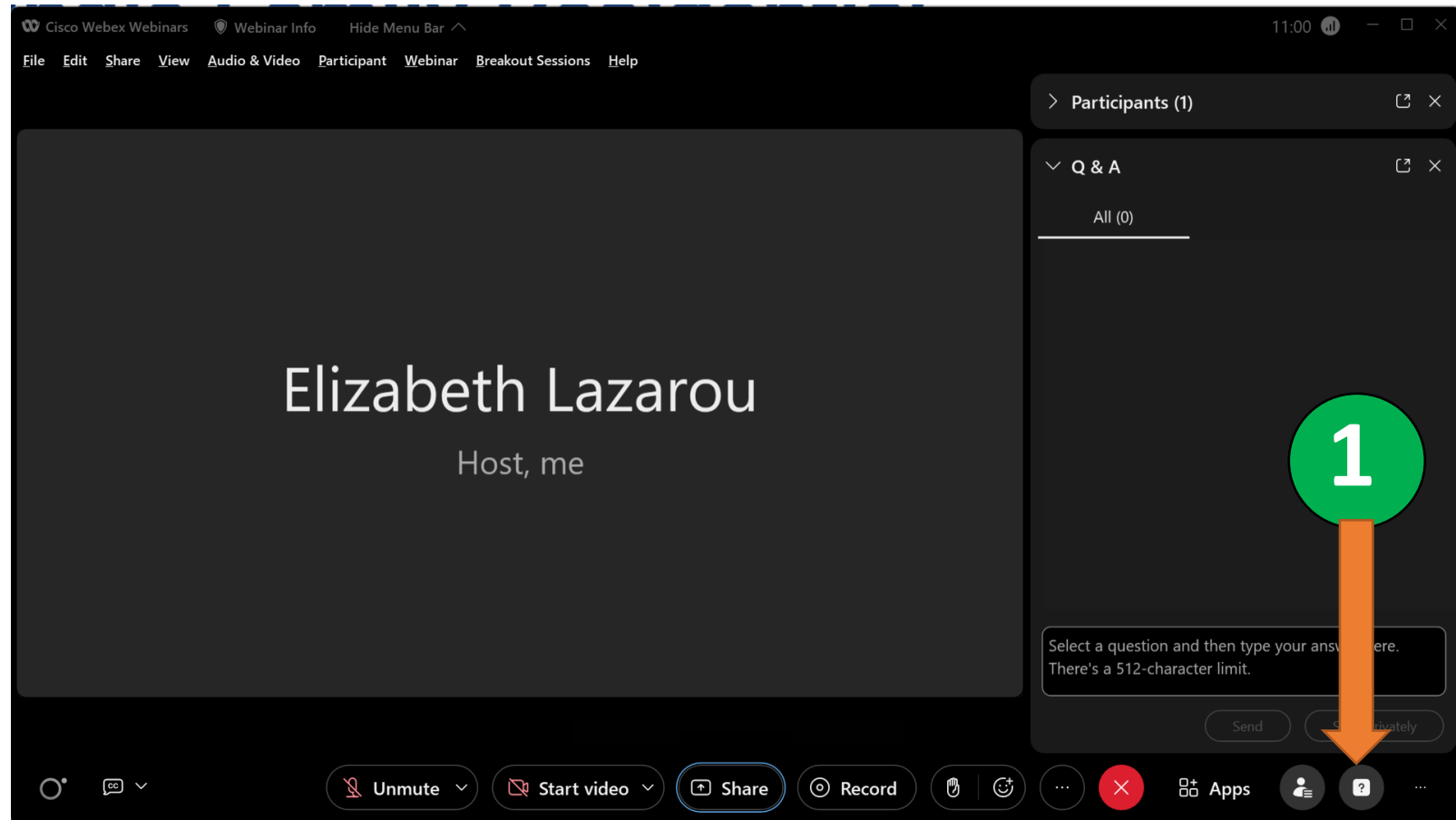


NYSERDA

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

OPTION 1 - TEXT

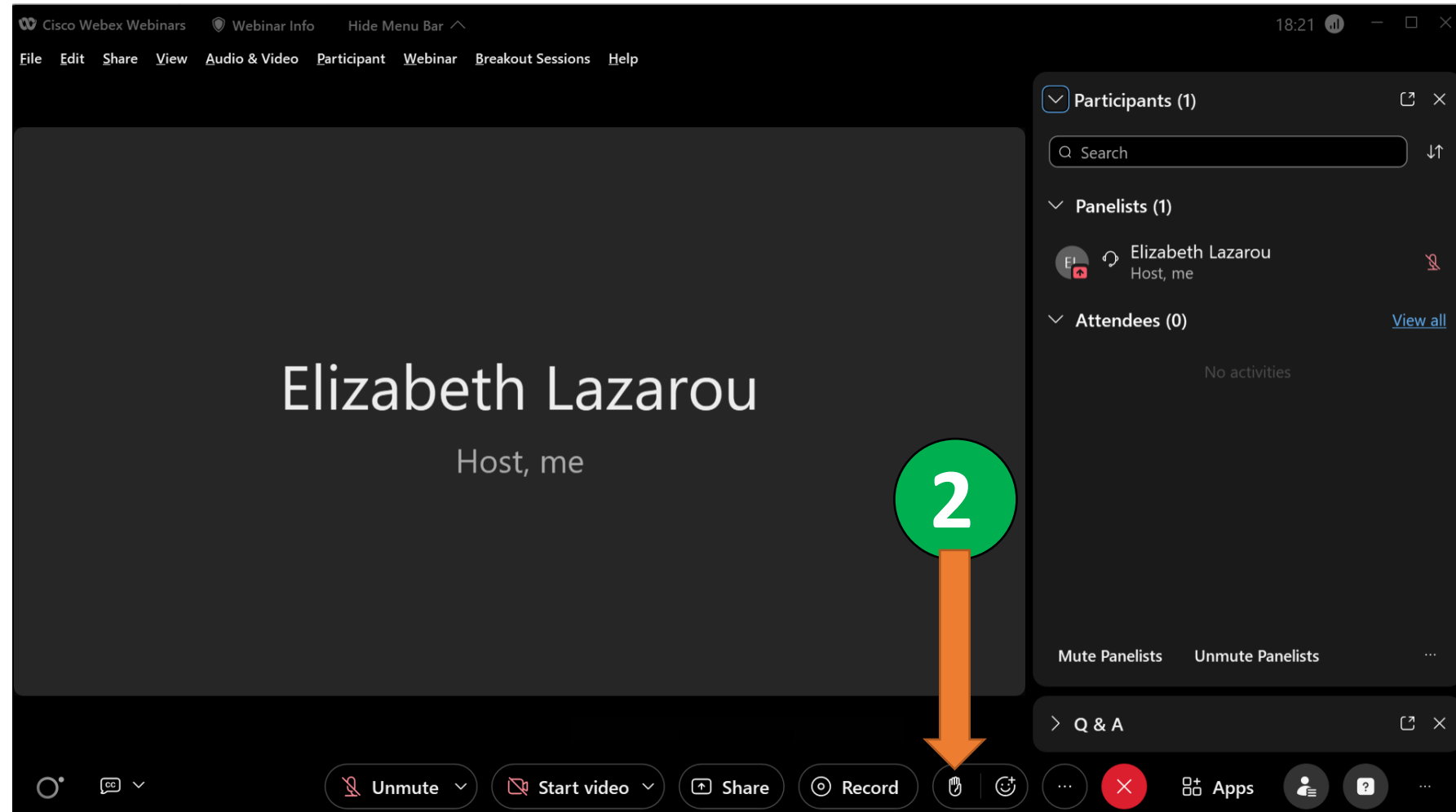
- > Locate the Q&A function by clicking on the question mark icon in the lower right portion of your webinar panel.
- > Type your question into the text field and click "send."



Options for Q&A During Today's Webinar - Mic/Phone

OPTION 2 - MIC/PHONE

- > Locate the “raise hand” icon in the toolbar at the bottom of your screen.
- > Click on the raise hand icon to let us know you have a question.
- > The Host will indicate when you have been sent a request to unmute, click on the unmute request then ask your question verbally through your computer mic or phone.



Agenda

1. BPA Conference
2. Year in Review
3. Looking forward to 2024
4. Program Updates and Reminders
5. Call Center Updates
6. Contractor Engagement Updates
7. Moderate Income Heat Pump Pilot



NYSERDA

BPA Conference

SAVE THE DATE



FEBRUARY 13-14, 2024
SARATOGA SPRINGS, NY



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

2023 Year in Review

EmPower+

2023 Year in Review

	EmPower+ (Low-Income)	EmPower+ (Moderate) Income	Total
Completed Audits	19,721	704	20,425
Completed Projects	22,108	568	22,676
Annual Total Incentives	\$151,186,773	\$1,869,526	\$153,056,299
Annual Electric kWh Savings	14,023,399	-92,645	13,930,754
Annual MMBtu Savings	559,903	7,399	567,302

What's in store for 2024?

Looking ahead

- NYSERDA internal workstreams
 - Forms reduction
 - NYHEP improvements
 - Technical Service communications improvements
- Inflation Reduction Act
 - On **December 28, 2023**, NYSERDA submitted its initial application to the U.S. Department of Energy (DOE) for the first phase of deployment of the Inflation Reduction Act Home Energy Rebate programs funding. **While consumer rebates are not yet available**, NYSERDA is excited by this first step of the multi-step process to pursue this critical federal funding, and looks forward to building home energy programs based on valuable, stakeholder feedback so that all New York State residents benefit.

Program Updates and Reminders

Program Changes, Updates, & Reminders

As communicated through various Program Announcements, the following Program changes are effective as of January 1, 2024:

Project Acceptance Timelines:

- Initial Contractor Assignment- Contractor has 5 business days to accept the Enrollment and can request a one-time, 5-business day extension.
- Second Contractor Assignment-If the initial Contractor does not accept the Enrollment within the initial 5 day w/5 day extension period or rejects it, the Enrollment will be auto-assigned to a second Contractor who will have 5 business days to accept the Enrollment. No extensions will be granted to the second contractor.
- Third Contractor Assignment- If the second Contractor does not accept the Enrollment within 5 business days, the Enrollment will get auto-assigned to a third Contractor who will have 5 business days to accept the Enrollment. No extensions will be granted to the third contractor.
- Final Contractor Assignment- If the third Contractor fails to accept the Enrollment, it will get sent to a manual assignment queue where the implementor will work with a Contractor to get the customer accepted.

It is imperative for Contractors to routinely check their customer assignment queues. If you know you cannot serve a particular household, then decline the assignment in a timely manner.

Program Changes, Updates, & Reminders

Field Change Orders

- For projects where the approved workscope is different than the final workscope, regardless of the dollar amount, a [Field Change Order](#) must be completed and signed by the household as affirmation they have been informed of the modification to the project. In instances where the changes are greater than \$500, the Participating Contractor must receive approval from the Program. This can be a call to the contractor support line or modification in NYHEP.

Assessment Installation Form

- For all projects, the Assessment Installation Form must be reviewed and signed by the household. Preferably, this should occur at the time of the assessment; however, it can be signed at a later stage providing a signed copy is uploaded as part of the final project submission.
- Currently, NYSERDA is working with the BPCA and Participating Contractors to review and streamline existing Program forms. NYSERDA expects this effort to be completed in early 2024 and will provide updates to the forms and requirements once available.

The full Program Announcements for these changes can be found at: <https://hpwescontractorsupport.com/program-announcements/>

Program Changes, Updates, & Reminders

- When discussing program offerings with customers, please refer to the Program as EmPower+, and update any program materials you have generated to replace EmPower New York/Assisted Home Performance to EmPower+, correct logos, etc. including:
 - Websites
 - Use of the NYSERDA attribution logo
 - [NYSERDA Logo Requests](#)
 - Any links to the EmPower+ application
 - Handouts and other materials
- As of Jan. 1, 2024 the use of the ENERGY STAR logo is no longer authorized for use by NYSERDA program partners.
- Any marketing or media review requests with references to “EmPower” and not EmPower+ will be denied.
- NYSERDA has been reviewing contractor webpages and will reach out if outdated Program references are identified



NYSERDA Residential Call Center Updates

Hotline Changes for 2024

- NYSERDA has a new contractor (TRC Companies) implementing the 877-NYSMART Call Center for the NYSERDA residential programs.
- TRC started supporting the call center on December 21, 2023, at 8:30 am.
- The 877-NYSMART hotline was redirected to ring at the same IVR menu as the 866-NYSERDA hotline. (TRC also manages the 866-NYSERDA hotline.)
- There are several options on the new IVR menu when you call 877-NYSMART. We are hoping by adding the various IVR menus your calls will be directed to the team that can assist you best.

Initial IVR Menu

- The image below displays the new IVR callers will hear initially when calling the 877-NYSMART hotline:

Greeting: Thank you for calling NYSERDA, the New York State Energy Research and Development Authority, located at 17 Columbia Circle in Albany, NY.

[In Spanish - if you'd like to speak with a Spanish-speaking representative, please press 9].

If you know your party's 4-digit extension, you may enter it at any time.

For questions or information about our residential energy efficiency programs including **EmPower+** or Residential Energy Audits, press 1;

For NY-Sun and other solar questions, press 2;

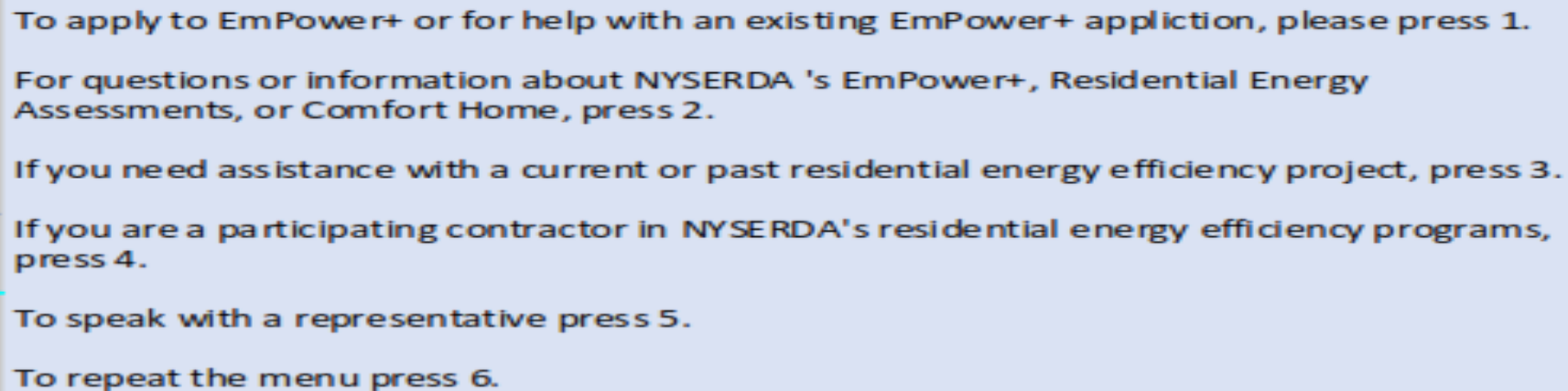
For Drive Clean, Charge Ready or other transportation questions, press 3;

For all other inquiries, press 4;

To access our corporate directory, please press 5.

Residential IVR Menu – Option One

- The Residential Programs are assigned to Option One on the initial IVR menu.
- When Option One is selected the caller is presented with a second IVR menu related to different residential program situations:



To apply to EmPower+ or for help with an existing EmPower+ application, please press 1.

For questions or information about NYSERDA 's EmPower+, Residential Energy Assessments, or Comfort Home, press 2.

If you need assistance with a current or past residential energy efficiency project, press 3.

If you are a participating contractor in NYSERDA's residential energy efficiency programs, press 4.

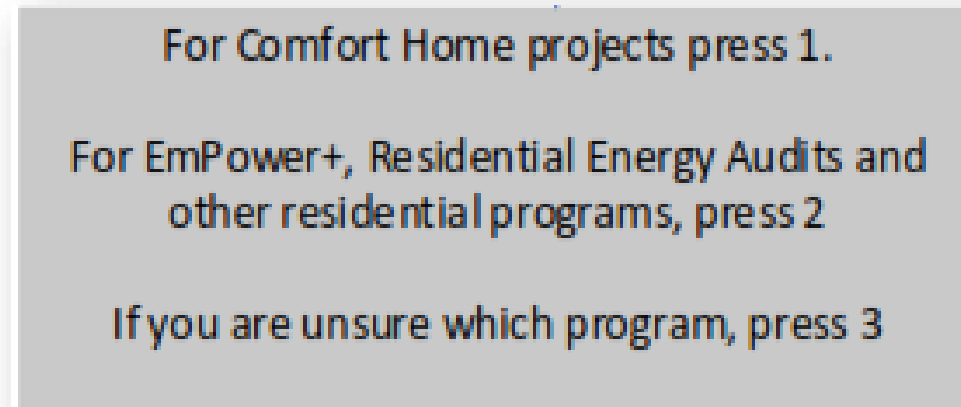
To speak with a representative press 5.

To repeat the menu press 6.

- Options One, Two, and Five route callers to TRC Personnel. Option Three connects to a third IVR. Option Four will connect to the Contactor Support Call Center.

Third IVR Menu – Option Three

- Option Three on the second IVR will route the caller to another IVR menu to help them get to the appropriate party to assist them.
- Below is an image of the third IVR menu:



- Option One will connect the caller to TRC Personnel. Options Two and Three will route callers to the contractor support line 800-284-9069.

Third IVR Menu – Option Four

- Option four on the second IVR this will route callers to the contractor support line – 800-284-9069
 - This hotline can assist with access to the contractor portal, or with questions related to current/past projects and for questions about how to participate with NYSERDA. The TRC personnel do not have access to this specific information and cannot assist with these types of inquiries.
 - This team can also be contacted via email at support.residential@nyserda.ny.gov

IVR Map

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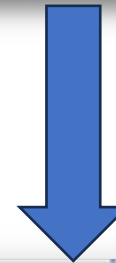
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For Drive Clean, Charge Ready or other transportation questions, press 3;
For all other inquiries, press 4;
To access our corporate directory, please press 5.

Option 1



To apply to EmPower+ or for help with an existing EmPower+ application, please press 1.
For questions or information about NYSERDA's EmPower+, Residential Energy Assessments, or Comfort Home, press 2.
If you need assistance with a current or past residential energy efficiency project, press 3.
If you are a participating contractor in NYSERDA's residential energy efficiency programs, press 4.
To speak with a representative press 5.
To repeat the menu press 6.

Option 3



For Comfort Home projects press 1.

For EmPower+, Residential Energy Audits and other residential programs, press 2

If you are unsure which program, press 3

Comfort Home Hotline

- Comfort Home Hotline – calls to the Comfort Home hotline 888-406-4009
 - On December 21st a new IVR menu was added to this hotline:
 - Option One on the IVR is for callers looking to participate in the program which connects the caller to the TRC hotline.
 - Option Two is for contractors with Comfort Home projects or looking to participate in the Comfort Home program and this connects the caller to the Comfort Home project team.

Call Center Programming

- The new call center allows callers to leave voicemails if they call after hours, on weekends or during holidays.
- The hours of operation remain the same 8:30 am – 5:00 pm.
- Calls that are on hold for five minutes will be routed to voicemail if no agents are available. Additionally, callers have the option to leave a voicemail rather than waiting on hold.
- Voicemails will be returned within one business day.
- Any questions?

Contractor Engagement Updates

Implementation Contractor Updates

Effective January 1, 2024, Program implementation services were transitioned to TRC and CLEAResult to provide programmatic and customer support.

- Moving forward, NYSERDA's expectation is to streamline and align implementation support across all Single-Family Residential programs.
- Over the next several weeks, staff will be working to make the necessary system and internal process updates. While we expect minimal interruptions and impacts to the services provided, we appreciate your support and understanding as the Implementation teams work through the changes.

If you have any questions, please email: resmarket@nyserda.ny.gov.

Customer Engagement and Enrollment Contractor

Effective January 1, 2024, TRC assumed the responsibility of customer support prior to, and through, the application enrollment process.

Specifically, TRC will:

- Provide call-center support for customers to answer questions about program offerings and assist with customer enrollment
- Process customer applications for EmPower+
- Provide income verification services for program incentives
- Process low-income referral files and mailings or other outreach to referred customers
- The customer application will continue to be in Salesforce and no changes to the application process is expected.

For questions on customer applications to EmPower+, TRC will be handling calls received through the 1-866-NYSERDA number, or Customer Support 1-877-NYSMART

For EmPower+ paper applications that will be mailed in, the updated address is: TRC Companies
3 Corporate Drive, Suite 202
Clifton Park, NY 12065

Program Operations and Technical Support Contractor

CLEAResult has been selected as the Program Operations and Technical Support Contractor responsible for customer support once an application has been approved, as well as programmatic and technical support for contractors in the EmPower+ and Residential Energy Assessment programs.

Specifically, their role will include the following:

- Contractor Assignment for Approved EmPower+ Applications
- Technical and programmatic support to contractors through trainings, in-field and remote assistance, responding to support tickets and managing a help desk
- Customer support for in-progress work and post-completion inquiries or other issues
- Manual workscope and final project reviews for EmPower+, including incentive invoice processing
- Residential Energy Assessment submission review, including incentive invoice processing
- Assisting with the maintenance of program participation agreements, program processes and other resources

For enrollment related questions, post application approval, please contact Contractor Support at **1-800-284-9069**. There is no change in the current contractor support phone number. Workflow approval procedures and invoice submission processes will continue to be processed in the New York Home Energy Portal.

Communications and Support Transition Timeline

CLEAResult will continue to handle all NYHEP workflows with their responsibilities beginning when the approved application is pushed over from Salesforce by TRC.

CLEAResult will transition away from a dedicated Account Management team to a centralized Communications and Help Desk for customers, contractors and program partners. The new tiered support model will also have additional communication channels to ask questions. This will be more efficient and scalable to meet the current demands and anticipated growth of the EmPower+ program. This transition will take place throughout Q1.

Communication Support Channels

Existing

- Email
- Contractor Support Phone Line
- On Site Inspections

Future Additions (anticipated by end of Q1)

- Chat
- Text
- Virtual Video Collaboration

Tiered Support

The Communications and Help Desk Center will have a first contact resolution approach. Questions or issues that cannot be resolved upon first contact will be escalated via tiered support to staff with increasing technical or programmatic expertise. CLEAResult will triage or answer incoming communications via various channels.

Who Do I Call?

Support questions should be directed to:

Customer Engagement and Enrollment Contractor

- Implementor: **TRC**
- 1-866-NYSERDA
- info.residential@nyserda.ny.gov
- Call-center support for customers to answer questions about program offerings and assist with customer enrollment and applications to EmPower+. Process customer applications for EmPower+ and provide income verification services for program incentives.

Program Operations and Technical Support

- Implementor: **CLEARresult**
- 1-800-284-9069, calls will be routed to person best able to assist
- support.residential@nyserda.ny.gov
- Customer support once an application has been approved as well as programmatic and technical support for contractors in the EmPower+ and Residential Energy Assessment programs.

TRC



CLEARresult



Moderate Income Heat Pump Study

Questions?



NYSERDA