

Single Family Residential Program Update

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EmPower +

February 2, 2024

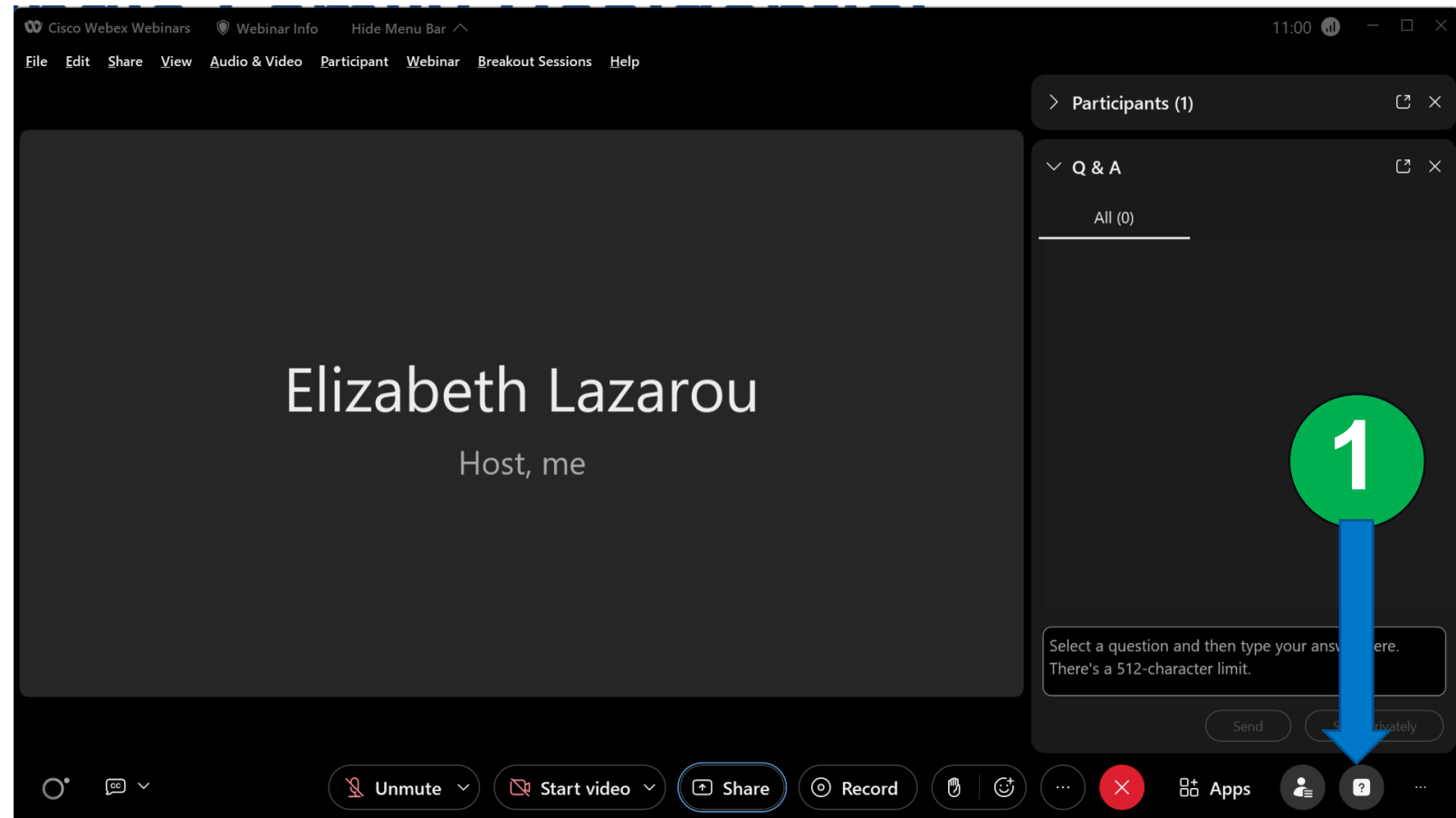


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Options for Q&A During Today's Webinar - Text

OPTION 1 - TEXT

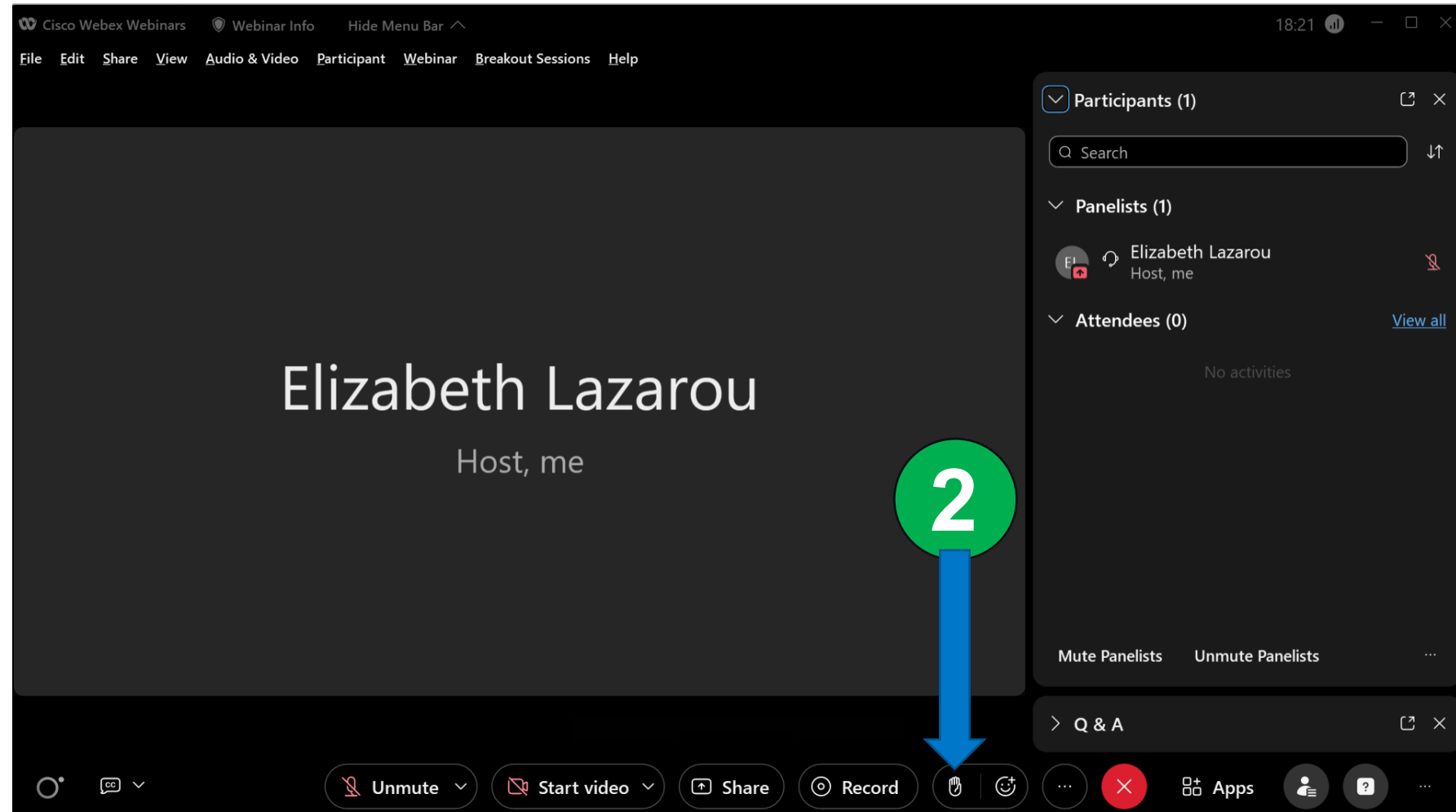
- > Locate the Q&A function by clicking on the question mark box in the lower right portion of your webinar panel.
- > Type your question into the text field and click "send."



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. Geo eligibility sunset
2. Assessment report to customers
3. Income Documentation Update
4. EmPower+ Pricing
5. Contractor NYHEP training on changing job types (Audit Install vs. Full Comprehensive)
6. Program Manual Updates
7. BPA Clean Energy for Homes Conference
8. NYSERDA Call Center Reminder
9. Moderate Income Heat Pump Adder Study



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Geo Eligibility Sunset

Geo-eligibility Wind Down in EmPower+

- EmPower+ Applications will be updated to meet federal requirements and new customer consent language
- Income qualification sources will be limited to referrals from utilities and OTDA, award letters (HEAP, SNAP, SSI, TANF, and Public Assistance), and standard income documents. Geo-eligibility will not be allowed.
- Geo-eligibility use for income approval will end on January 31, 2024.
- Contractors will be given a list of all EmPower+ customers who were approved by geo-eligibility and will have until April 15, 2024 to submit final project paperwork.
- If final paperwork is not received by April 15, CLEAResult will close the project.
- If a customer applies to the program with different income verification, a new enrollment will be created. The contractor can use house data from the previous enrollment to populate the new enrollment.
- NYSERDA will mail customers approved via geo-eligibility to make them aware of this process, starting with an initial letter on February 1 and a follow up letter in early April.
- **This change is specific to EmPower+ and does not impact geo-eligibility for Residential Financing.**

Assessment Report to Customers

Energy Assessment Reports

- The EmPower+ program has been receiving many customer complaints about participants not receiving copies of their home energy assessment.
- Section 5.17 of the Program manual specifies “The participating contractor shall provide Program participants with a finalized home energy assessment report within 14 calendar days of site visit. The report shall be generated from Program-approved software and include a detailed workscope proposal that identifies measures and pricing for improving the energy efficiency, comfort and safety of the home. The report shall include all energy efficiency, comfort, health and safety opportunities that exist in the home regardless of type of service(s) the participating contractor offers (i.e., a participating contractor with heating certification needs to identify applicable envelope issues in the report) while adhering to the policies and procedures.”
- For the upcoming HEAR and HER programs, energy assessment reports are required and NYSERDA may need to show proof to the Department of Energy that the reports were provided.

Assessment Report Delivery Verification

- Starting on February 13th, CLEAResult will verify that the Assessment report has been generated as part of final project review. If the report is not present, the project will be pushed back to the contractor to generate the report and deliver it to the customer. After the report has been delivered to the customer, the contractor can resubmit the project.
- SQA will also begin to check with customers during their inspections to see if assessment reports were delivered. Initially, scores will not be diminished if a report has not been given to the customer, but the contractor will be notified to resend the report to the customer. If a contractor has been found to not give customers reports on a regular basis, CLEAResult Quality Control will work with the contractor to help them remediate this.

Income Documentation Update

Update to how to use a tax return for income qualification

- The Income Eligibility Process Document, Section 3.6 of the [Program Manual](#), has been updated to reflect upcoming program changes and to provide consistency between the different forms of income eligibility. As discussed earlier, Geo-Eligibility for determining eligibility for the EmPower+ low-income incentive ended on February 1, 2024. The Income Eligibility Process Document has been updated to remove Geo-Eligibility as an acceptable income eligibility method.
- For Standard Eligibility, Section 3.6 provides guidance for using the IRS Tax Form Transcript and Tax documentation using a 1040, 1040 A, 1014-SR, or 1040-EZ. Effective immediately, when using any of these tax documents for determining EmPower+ eligibility, the adjusted gross income figure should be used for determining a household's income for low-or moderate income EmPower+ eligibility. If using a W2, then take the figure provided in Box-1 Wages, tips, and other Compensation.

EmPower+ Pricing

Fuel Rate and Measure Pricing Update

Updates are being made to the 2024 fuel rates used in both EmPower+ NY and Residential Energy Assessment (REA) Programs and measure pricing for EmPower+ NY. Once finalized, notification will be sent indicating that the following have been updated on the Contractor Support site and NYHEP (NY Home Energy Portal) along with the effective date of the change.

EmPower+ Program Manual: <https://hpwescontractorsupport.com/2022-2023-program-manual/>

- Section 5.5 | EmPower+ NY Pricing (NY Single Family Residential Existing Homes Energy Pricing)
- Section 5.12 | Energy Pricing

NYHEP (NY Home Energy Portal) Programs

- EmPower+
- Residential Energy Assessments

NYHEP

Changing Job Type

Audit Install vs. Full Comprehensive

NY Home Energy Portal (NYHEP)

Project Type Selection (1 of 2)

Project types are assigned in a NYHEP enrollment based on the application information.

Assigned Project Types

Full Comprehensive

- owner occupied, rental with signed landlord agreement
- assessment, direct install and eligible measures

Audit Install

- rental, no signed landlord agreement
- assessment and direct install only (rental or owner occupied)

Muni Install

- municipal electric supplier, limited funding
- assessment, limited direct install and eligible measures

NY Home Energy Portal (NYHEP)

Project Type Selection (2 of 2)

Contractors should adjust the Project Type at Workscope Submission that aligns with the work being performed in the home.

Workscope Submission >> Applicant Information tab >> Additional Applicant Information section

Additional Applicant Information

Assigned Project Type
Full Comprehensive

Household Demographics Details

Persons with disabilities
0

Approved Income Tier
1

****Project Type**

Full Comprehensive

(Click to Select)

Full Comprehensive

Muni Install

Audit Install

Contractor

Adjusted Updated Project Type

Full Comprehensive → Audit Install

- only an assessment and direct install measures completed

Audit Install → Full Comprehensive

- signed landlord agreement obtained and submitted
- assessment, direct install and eligible measures completed

No project should be changed to a Muni Install unless directed by NYSERDA or CLEAResult

Program Manual Updates

Program Manual Updates

- The Program Manual is being updated to reflect the transition with CLEAResult and TRC. Still in process is the updated contacts Section and “Program Background” Section which should be made available in early to mid February
- Section 3.6, “Income Eligibility Process”
 - References to Geo-Eligibility have been removed
 - Updates to using tax forms and W-2s for income qualifying have been included
- As mentioned earlier, the EmPower+ Application, including all translated versions, is being updated to meet federal requirements and new customer consent language. Once finalized these will be uploaded to Section 3 of the Program Manual and posted on the EmPower+ web pages.

BPA Clean Energy for Homes Conference

Clean Energy for Homes Conference

- This February 13-14, at the Saratoga Hilton, 534 Broadway Saratoga Springs, New York.
- CLEAResult will have office hours for any Q&A.
- Clean Energy Hubs will be on site.
- Contractor Century Club Awards will be on site.



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BPA Conference

- Contractors who have won Century Club Awards for 2022-2023 have been notified via email. The awards will be available for pickup at the BPA conference in CLEARResult's space near the registration area. In the event you cannot make it to the conference, NYSERDA will work with CLEARResult to get the award to the contractor.

NYSERDA Call Center Reminder

NYSERDA Toll-Free Numbers

There are two main toll-free numbers for assisting callers to get information on NYSERDA programs. Both lines are open Mon – Fri 8:30 am – 5:00 pm.

- > 866-NYSERDA – 866-697-3732
- > 877-NYSMART – 877-697-6278
- > Both phone numbers connect to the same menu for customer assistance. There are different options to help callers get to the appropriate program team (please see below).

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.

NYSERDA Contractor Support Hotline

For Residential contractors that need assistance with projects, access to NYSERDA platforms or questions on the process to become an approved contractor, please call 1-800-284-9069 for assistance.

> There are several menu options on this hotline, please ensure you select the most appropriate option for your needs.

This hotline is open Monday – Friday 8:30 am – 5:00 pm.

The Contractor Support line can also be contacted via email at support.residential@nyserda.ny.gov

Moderate Income Heat Pump Study

Questions?



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