

# Single Family Residential Program Update

Scott Oliver, Program Manager  
David Friello, Senior Project Manager  
Keith Bohling, Senior Project Manager  
Steve Wagner, Senior Project Manager

**EmPower +  
Residential Energy Assessments (REA)  
Comfort Home**

March 1, 2024

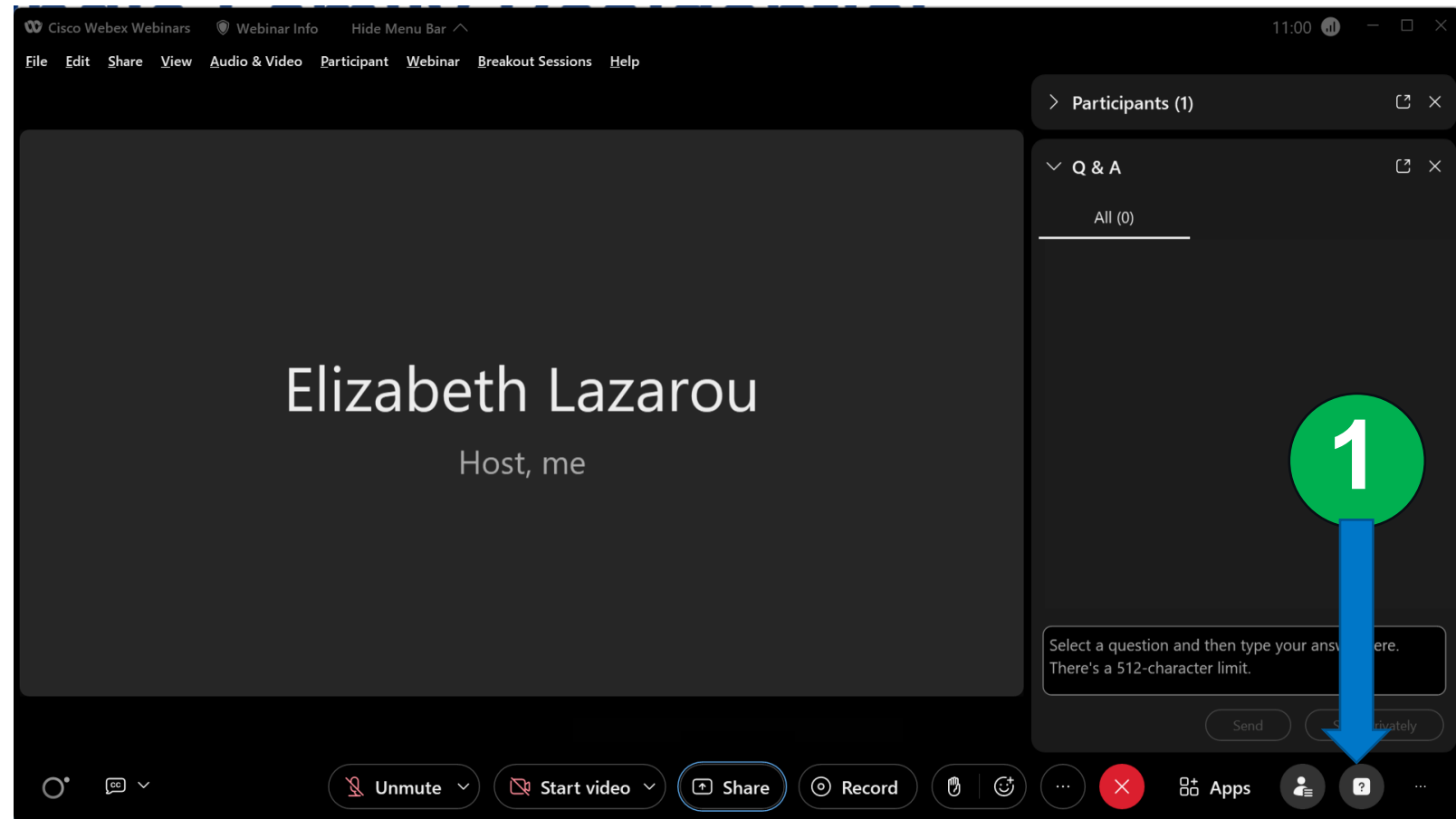


**NYSERDA**

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

## OPTION 1 - TEXT

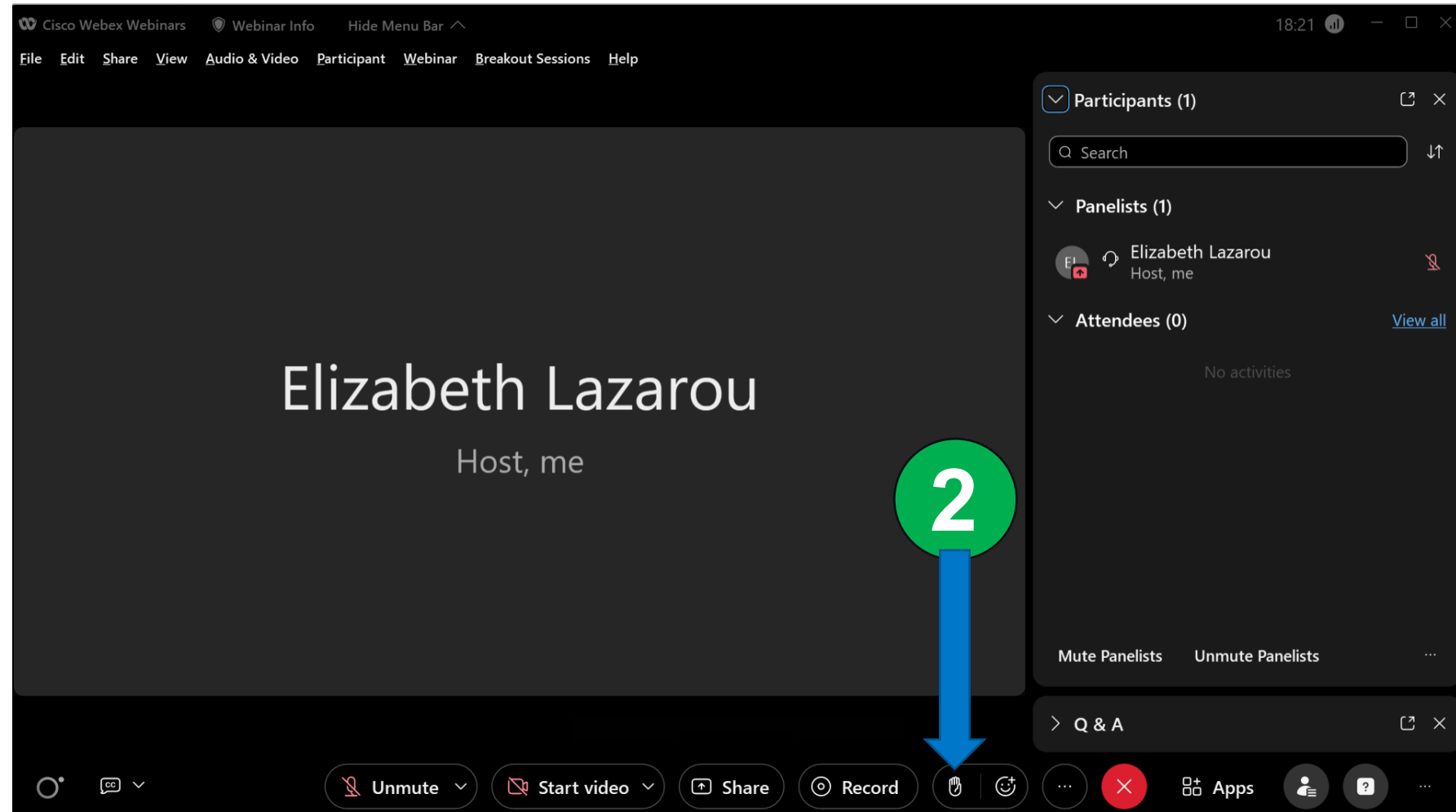
- > Locate the Q&A function by clicking on the question mark box in the lower right portion of your webinar panel.
- > Type your question into the text field and click "send."



# 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

- Upcoming NYHEP System Updates & Enhancements
- Mailing List Change
- Residential Energy Assessments
- Comfort Home
- EmPower+
  - Pricing Updates
  - How to manage availability for new customers
  - 2-4 Unit/Vacant Unit Process Reminder
  - OTDA HEAP Award Letter Process
  - New Data Collection Forms
- ASHP Incentive Pilot Study- Last Call for Applications



NYSERDA

# **Upcoming NYHEP System Updates & Enhancements**

# NYHEP will be updated March 14, 2024

Thank you for your feedback for the NY Home Energy Portal (NYHEP). NYSERDA and our developers are working to make the requested improvements and release enhancements on a monthly cadence.

NYHEP will be updated on March 14, 2024 with the following changes:

- All users: Ability to choose multiple document types when uploading a file
- NYSERDA/Implementation users: Enhanced Implementation/Contractor profile features and management tools
- Numerous back-end data exchange enhancements to streamline reporting and other bug fixes.

**During the update, the NYHEP access will be unavailable**

# Mailing List Change

# Program Announcements – Mailing List

Effective Feb. 22, 2024, NYSERDA transitioned its email blasting service for Program Announcements and other important notifications to Salesforce.

Current mailing lists were brought over automatically and **no further action** is needed

If you previously received the program announcements but did not receive last weeks notice, please send us a note at [empower.residential@nyserda.ny.gov](mailto:empower.residential@nyserda.ny.gov)

A new webform on the Contractor Support site to sign up for notifications will be available later this month.

Program Announcements are also available here:

<https://hpwescontractorsupport.com/program-announcements/>



# **Residential Energy Assessment Program (REA)**

# NYHEP Customer Creation

- Updates have been made in NYHEP V3.0 to streamline the Customer Creation section.
  - > Limited number of drop-down options
  - > Values from Customer page migrated to Account and Premise pages.
- Specific changes can be seen in the REA section of [Knowledge Base](#)

# REA Find a Contractor Website

- [REA Participating Contractor Listing](#) has been updated to an online search style.
  - > PDF listing retired.
- Take a minute to review your listing for accuracy and be aware of the new link.
- Email [homeaudits@nyscrda.ny.gov](mailto:homeaudits@nyscrda.ny.gov) with the subject line “New Contractor Listing”

## Residential Energy Assessment Participating Contractors


All New York homeowners of one-to-four family homes can get a no-cost energy assessment from a NYSERDA Residential Energy Auditor. An Auditor will give you a top-to-bottom look at where your home is wasting energy including the root causes of any drafts, inconsistent temperatures, heating and cooling system failures, or other energy related concerns.

### Find Your Contractor

Locate a participating contractor by selecting your county from the dropdown and contact them directly to schedule your Residential Energy Assessment. There is no application; your selected auditor will schedule your assessment and complete the paperwork for your no cost energy assessment.

Residential Energy Assessments

Search Company:

Select a County 

# Updated REA Customer Attestation Form

- New form posted to the contractor website on 2/14/24
- Notification was made in the NYHEP Announcement section and the Program Announcement on 2/22/24.
- Minor updates to permissions were added to include required data sharing with the Department of Public Service as they regulate the work that NYSERDA does and the U.S. Department of Energy in preparation of the Inflation Reduction Act (IRA) funding
- As of March 1, all submissions should be on the updated form.

# Comfort Home

# Agenda

- **Program Updates and Reminders**
  - **Gable End/Knee Walls**
  - **QA Inspection expansion**
  - **URF update**

**Additional eligibility for Package B  
incentives- Gable end walls and Knee walls  
in an attic**

# Requirements for "Package B"

- **Meeting all measures for "Package A" and....**

- Adding insulation to exterior gable end walls and knee walls
- Above grade walls already meeting minimum requirement of R-14
- Floors above unconditioned insulated to program requirements (R-30 Zone 5 and 6, R-19 Zone 4)
  - The result is an increased thermal boundary and a higher incentive to the customer

- **Complete Basic Data Page**

- Select "Partially Insulated" for above grade wall insulation level

Above Grade Wall Insulation Level\*  level of the above grade walls (required) Needed for Compliance



# Package B – Enter the wall sq ft

Category \* Envelope ▼

Improvement Name \* Comfort Package B - Better ▼

Quantity 1 Each

Total Cost \$ 2000.00

Describe Proposed Improvement  
We are proposing knee wall/gable end wall

Improvement Status Recommended ▼

Above Grade Wall Total Area (sq. ft) \* 1120

Above Grade Wall Area Already Insulated (sq. ft) \* 985

Above Grade Wall Area to be Insulated (sq. ft) \* 135

Above Grade Wall Improved R-Value \* Greater than R-14 ▼

- We understand the amount of square footage to be insulated in the situation of either gable end walls or knee walls may not be substantial.
- Regardless, if modeled in this manner the project will now be eligible for package B incentives
- Be specific in the proposed improvement description

# QA Inspections Are Ramping Up

- **Previously:** QA Inspections was primarily focused on "Provisional" Contractors (new to Comfort Home) to help contractors earn 3 passing scores to be promoted to "Full" status.
- **Now:** NYSERDA is ramping up to a 10% inspection rate of all Comfort Home jobs including those installed by "Full" status contractors.
- **Why?:** This new 10% inspection rate aligns with best practices and with the EmPower+ Program.
- **How?:** The QA inspection process will be remaining the same.

# New Utility Release Form

- Updates Includes:
  - Utility account number and POD length/format chart at bottom of page 1
  - Form-fillable and electronic signing
- Same requirements apply
  - Must be signed and dated by customer
  - All customer information must be provided
  - All Utility Information must be provided
  - Uploaded to SharePoint only
- This form can be used for REA as well

## RELEASE FORM

### Residential Energy Efficiency



To be eligible to participate in New York State Energy Research and Development Authority (NYSERDA) residential energy efficiency programs, you must complete and sign this form.

Your signature authorizes NYSERDA, and its agents, to access the project reports, 24 months of pre-project and 36 months of post-project energy usage data from utilities and energy providers. Data will be accessed through Electronic Data Interchange (EDI), Green Button, or other electronic means and will be used in determining program eligibility, estimating energy savings, program implementation, and evaluation, including the evaluation of achieved energy savings.

To qualify for participation, you need to meet these requirements:

1. You must be the owner, or be authorized to sign for the owner, of a 1-4 unit residential property in New York State.
2. You must be a current electric customer of Consolidated Edison of New York, Inc. (Con Ed), New York State Electric and Gas Corporation (NYSEG), Rochester Gas and Electric Corporation (RG&E), Central Hudson Gas and Electric Corporation, Orange and Rockland (O&R), or National Grid.

CUSTOMER INFORMATION			
Project ID/Name (from your contractor)			
First Name		Last Name	
Street Address (of the project home)			
City		State	Zip
Email Address		Phone Number	
Home Ownership: <input type="checkbox"/> I own this home <input type="checkbox"/> I rent this home <input type="checkbox"/> Other:			

#### UTILITY ACCOUNT NUMBER FORMATS (FOR USE ON NEXT PAGE)

Utility Company	Account # Length	POD ID	Form Requirement
New York State Electric and Gas Corporation (NYSEG)	11	15 characters long. Starts with "N01" for electric. Starts with "N02" for gas	POD # (required) Account # (optional)
Rochester Gas and Electric Corporation (RG&E)	11	15 characters long. Starts with "R01" for electric. Starts with "R02" for gas	POD # (required) Account # (optional)
Consolidated Edison of New York, Inc. (Con Ed)	11	N/A	Account # (required)
Central Hudson Gas and Electric Corporation	11	10 numeric digits	POD # (required) Account # (optional)
Orange and Rockland (O&R)	11	N/A	Account # (required)
National Grid	10	N/A	Account # (required)

➤ All Customer signatures dated March 1, 2024 and beyond must use the new form

- How does the CH team know contractors are using the correct version of URF?
- By checking the version date

**UTILITY INFORMATION**

Electric Company: \_\_\_\_\_

Electric Account Number: \_\_\_\_\_

Electric POD Number (For NYSEG, RG&E, and Central Hudson customers): \_\_\_\_\_

Gas Utility Company: \_\_\_\_\_

Gas Account Number: \_\_\_\_\_

Gas POD Number (For NYSEG, RG&E, and Central Hudson customers): \_\_\_\_\_

Do you heat with a fuel type other than electric or natural gas? ☐ Yes ☐ No

If Yes, what fuel type do you use? ☐ Oil ☐ Propane ☐ Wood Pellets ☐ Cord Wood

• Other Heating Fuel Supplier Name: \_\_\_\_\_

• Other Heating Fuel Account Number: \_\_\_\_\_

**AUTHORIZED SIGNATURE**

I certify that I am the owner, or I am authorized by the owner to make improvements to the building at the above property address. My signature certifies that I am financially responsible for the account(s) listed above. I am a New York State resident and meet the utility customer requirements shown on page one of this document. I agree and authorize the sharing of my information and/or project-level information with New York State Department of Public Service Staff and appropriate local utility, including its agents or authorized representatives, in carrying out its responsibilities under New York State Public Service Commission orders (For clarity, the term project level includes the information based on the scope of the project, including, but not limited to, whole building, building or subsets of the project). I hereby consent and authorize NYSEDA to share my customer information and project information with the utilities listed above and the U.S. Department of Energy. I hereby consent and authorize the electricity and fuel suppliers named above to release any and all energy usage information, including account number(s), related to the above property address, to representatives of the New York State Energy Research and Development Authority (NYSEDA), and/or its designated representatives for the period beginning two years prior and ending three years after the date this form is completed. I understand that this information will be kept confidential, to the extent permitted by law, and used only for the purpose of determining program eligibility, estimating energy savings, program implementation, and evaluation, including the evaluation of achieved energy savings. I will provide NYSEDA with information about any energy efficiency upgrades made to this home within the next three (3) years by submitting a completed form online or mailed survey. I understand that the energy savings numbers provided to me are estimates only and are not guaranteed by either my auditor or NYSEDA. I acknowledge that the energy savings information from the Report may vary from energy savings calculations provided by my contractor through energy modeling simulation tools. I certify that all information provided on this form is true and correct to the best of my knowledge. By submitting this form, I authorize NYSEDA to add me to the mailing lists and to share my information with New York State government and other entities doing business on NYSEDA's behalf. I reserve the right to unsubscribe at any time.


\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

SFR-CH-utilityinfo-form-1-v6 2/24

SFR-CH-utilityinfo-form-1-v6 2/24

 **NYSEDA**

# EmPower+

# Pricing Updates

# Fuel Rate and Measure Pricing Update

EmPower+ measure pricing and Program fuel rates were updated and posted on the [Contractor Support](#) website. They became effective as of February 23, 2024.

Measure pricing updates reflected changes to several variables including national inflation and consumer price index (CPI) data, and market price research. The updated list can be found in Section 5.5 of the [Program Manual](#) on the [Contractor Support site](#).

For Program fuel rates, natural gas and electricity rates were based on the Joint Utilities 2021-2023 SC1 3-year average. Delivered fuels were based upon the NYSERDA New York Home Pricing Monitoring Program 2022-2023 averages. For cost-effectiveness calculations, NYSERDA used volumetric charges including supply (commodity), transmission and distribution, and other charges applied based on the supply volume. Updated fuel rates can be found in Section 5.12 of the [Program Manual](#).

The NY Home Energy Portal (NYHEP) was updated and is effective for new projects initially submitted for Workscope Approval on or after February 23, 2024. NYSERDA finance has also updated their Proforma tool to reflect the updated fuel pricing.

# **How to Manage Availability to New Customers**



# EmPower+ Customer Acceptance

Contractors should reach out to Contractor Support to pause or restart their customer assignments if they are unable to serve the customer in a timely manner. This is beneficial as it:

- prevents repeated rejections by contractors
- contractor reassignments by Program
- reduces customer concerns that occur due to lengthy delays

CLEAResult will be reaching out to review and manage Contractor enrollments, with a focus on outstanding projects greater than 6 months and with a slower than average turn-around time.

Contractor Support

Email: [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov)

Phone: (800) 284 – 9069

*Future enhancements are planned that would allow contractors to adjust their ability to accept customers themselves.*

# **2-4 Unit/Vacant Unit Process Reminder**

# Application Submission for Multifamily with 2-4 Units

- Complete and signed application submitted for each unit along with:
  - Completed Landlord Agreements and Proof of Homeownership
  - Income documentation
- 50% rule
  - If 50% or more units qualify under Tier 1, then remaining units will qualify as Tier 1 and no income documentation will be necessary; conversely this applies for Tier 3 as well
    - Letter can be uploaded to income documentation section indicating unit qualifies under 50% rule
- Vacant Units
  - Landlords can submit applications for vacant units following same rules as occupied units (meeting income guidelines or qualifying under 50% rule)

# OTDA HEAP Award Letter Process

# OTDA HEAP Award Letter Process

- Accepting applications for when funding becomes available
  - HEAP Award Letters must be dated for on or after October 1<sup>st</sup>, 2023
  - Submit completed application as you normally would
    - Applications will be placed on hold while NYSERDA waits for confirmation from OTDA that recipient qualifies for the additional OTDA incentive
      - Please allow extra time for this process
        - If confirmed applicant will be notified of incentive amount (program team will determine funding amounts)
        - If not approved applicant will qualify for typical Tier 1 incentives of up to \$10k (less any prior incentives used within the last 3 years)
- *Please note that this is not offered year-round – there is a window of opportunity each year based on funding*

# New Data Collection Forms

# New Data Collection Forms

Contractors have requested data collection forms that have the data fields that are in NYHEP. Working with the BPCA, NYSERDA has created a single one page form available both as a Word Doc and a fillable PDF that can serve as a data collection form during an assessment. We have also produced a Excel spreadsheet that lists every data point in NYHEP if a contractor would like to use this information to create their own data collection page.

These forms are generated to help contractors collect data and their use is not required by the program.

They can be found on the contractor support site under the program resources tab by clicking on the Forms tab : <https://fmj.468.myftpupload.com/forms/>

# Appointment Date and Time:

# Auditor and Company Name:

Customer Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Customer Concerns: \_\_\_\_\_

Potential Measures: \_\_\_\_\_

Year Built: _____	# in Household: _____	Multi-Family? Y___ / N___
SQ Ft: _____	# of Stories: _____	# of Units: _____
Bed/Bath: _____	Story Height: _____	Renter? Y___ / N___
		Owner: _____

<b>ELECTRIC/FUEL</b> Utility Bills: Y___ / N___ Waiver: Y___ / N___ Electric Provider: _____ Electric Usage: _____ Electrical Panel Type/Size _____ AMP: _____ Extra Slots? Y___ / N___ Breakers___ / Fuses___ Gas/Oil Provider: _____ Fuel Usage: _____	<b>DWELLING INFORMATION</b> <b>EXTERIOR:</b> _____ ATTIC: SQFT _____ Insulation: _____ in. _____ 2nd Attic: SQFT _____ Insulation: _____ in. _____ Slopes: SQFT _____ Insulation: _____ in. _____ Kneewall: SQFT _____ Insulation: _____ in. _____ KW Floor: SQFT _____ Insulation: _____ in. _____ Hatches: QTY _____ Material: _____ in. _____ Access Cut in needed? Y___ / N___ QTY _____ Walk-Up Stairs: SQFT _____ Material: _____ in. _____ Floor 1 Walls: SQFT _____ Insulation: _____ in. _____ Floor 2 Walls: SQFT _____ Insulation: _____ in. _____ Overhang: SQFT _____ Insulation: _____ in. _____ Garage W/C: SQFT _____ Insulation: _____ in. _____ <b>BASEMENT___ / CRAWL___ / SLAB___ / UNDERBELLY___</b> Rim: SQFT _____ Insulation: _____ in. _____ Crawl Height: _____ Insulation: _____ in. _____
<b>HEATING SYSTEM</b> Forced Air___/Electric___/ Boiler___(water___/steam___) B-vented___/Sealed___/Natural___/ Induced Draft___ / Heat Pump___ Fuel type: NG___/Oil___/LP___/ Other_____ # of Zones: _____ Year_____ BTU Input _____ BTU Output _____ 1) CO___ EF %___ Spillage_____ 2) CO___ EF %___ Spillage_____ Duct Length Cond: _____ UnCond: _____ <b>COOLING SYSTEM</b> Y___/N___ Central___/Room___ BTU _____ SEER _____ Year_____ <b>WATER HEATER</b> DHW Year: _____ Type: _____ Fuel: _____ Size: _____ BTUs: _____ Venting: _____ Temperature set point: _____ Draft _____ CO _____ EF _____ <b>BLOWER DOOR</b> Test In # _____ Test Out # _____ Ring: Open___ /A___ /B___ /C___ Leaky___/Average___ / Tight___ Health Risk : _____	<b>APPLIANCES/OTHER</b> <b>Refrigerator 1</b> Size _____ Year _____ E-Star Y___ / N___ Top Freezer___ / Bottom Freezer___ / Side by Side___ / French___ <b>Refrigerator 2</b> Size _____ Year _____ E-Star Y___ / N___ Top Freezer___ / Bottom Freezer___ / Side by Side___ / French___ <b>Range / Oven</b> ( Gas___ / Elec. ) Oven CO _____ <b>Kitchen Fan</b> Recirculating Y___ / N___ Venting: _____ <b>Dryer</b> ( Gas___/Elec___/none___ ) Vented Properly Y___/N___ <b>Bath Fan(s)</b> Existing?Y___/N___ Vented Properly Y___/N___ <b>Lightbulbs</b> % LED _____ % Other _____ Type _____ <b>Thermostat</b> _____ <b>Windows</b> _____ SQFT _____ <b>CAZ</b> Worst Case _____ Base Case _____ Net _____



# **Moderate-Income ASHP Incentive Pilot Study**

# ASHP Incentive Pilot Study

**Last Call for applications**  
**March 31<sup>st</sup>**

Here is the contractor support website

<https://hpwescontractorsupport.com/moderate-income-heat-pump-incentive-study/>

And the application for customers

<https://nyserda.seamlessdocs.com/f/ModerateIncomeASHP>

# Questions?



NYSERDA