

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**

August 2, 2024

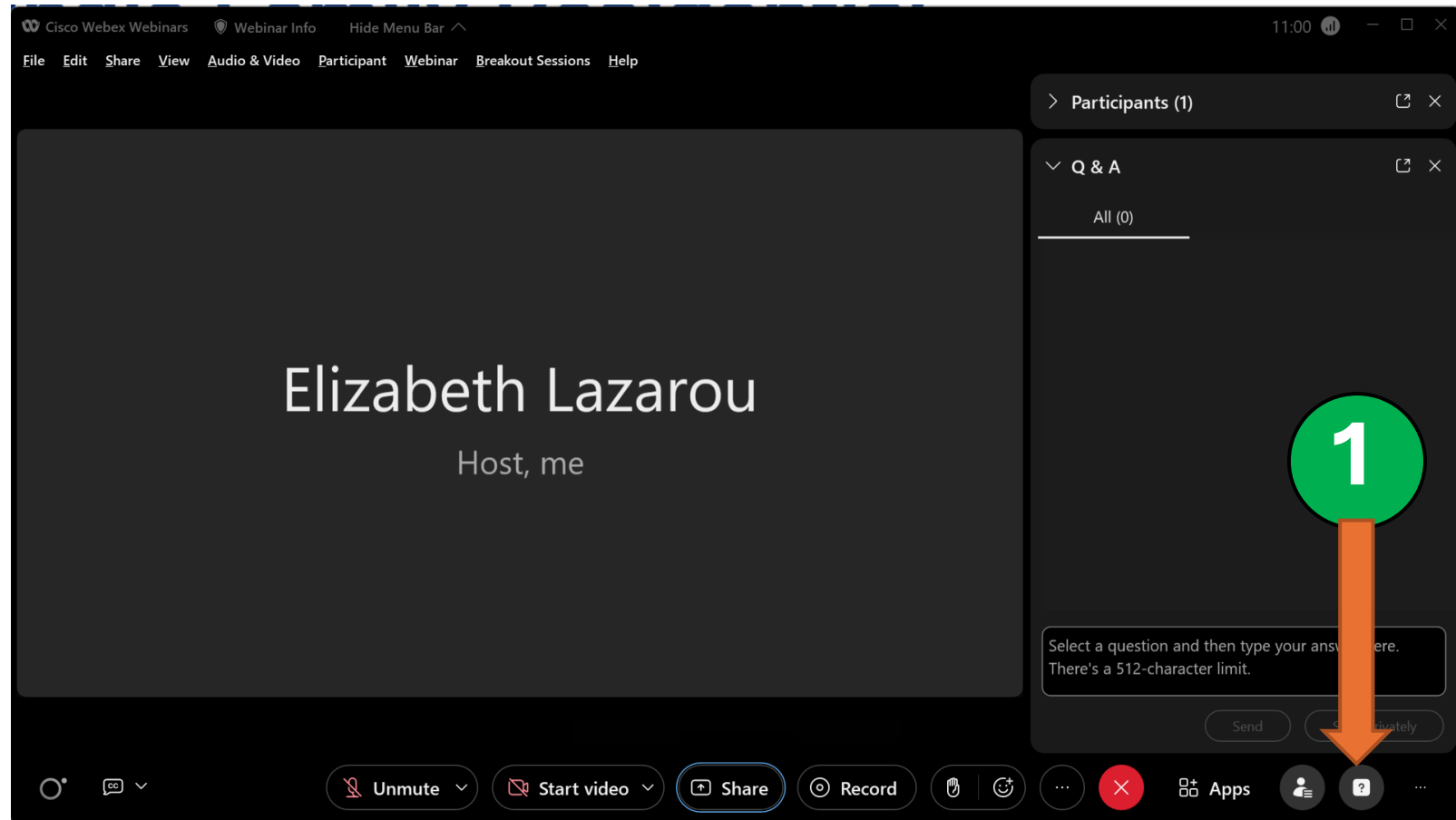


NYSERDA

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.

The screenshot displays the Cisco Webex Webinar interface. At the top, there is a menu bar with options: File, Edit, Share, View, Audio & Video, Participant, Webinar, Breakout Sessions, and Help. The main content area shows the name 'Elizabeth Lazarou' and the role 'Host, me'. On the right side, there is a sidebar with sections for 'Participants (1)', 'Panelists (1)', and 'Attendees (0)'. The 'Panelists (1)' section shows 'Elizabeth Lazarou' as the host. At the bottom of the screen, there is a toolbar with icons for 'Unmute', 'Start video', 'Share', 'Record', and 'Raise Hand'. A green circle with the number '2' is placed over the 'Raise Hand' icon, and an orange arrow points from this circle to the icon.

Agenda

EmPower+

- Contractor Payment Delays (COI)
- Contract Requirement Reminder
- Accessing Value Engineering Incentives with OTDA projects
- Avoiding common stopping points for Heat Pump project reviews
- Utility Bill/Usage Estimates for Heat Pumps

Comfort Home

- NYHEP Transition

Standards and Quality Assurance (SQA)

- Contractor Designation



NYSERDA

EmPower+

Payment Delays

Expired Certificates of Insurance

Autogenerated emails go out 15 days prior to expiration date and then again after that if the contractor has not submitted their updated COI.

Keep in mind that there are several components to the insurance process which is for ALL Programs NYSERDA-wide. They include checking the inbox for COIs, contacting the supplier(s) via email and phone calls when their COI has not been received, scanning and processing COIs sent via postal mail, sending out notices when the vendor invoice(s) are on hold for insurance and following up via email and phone calls, and lastly updating the system to make sure the contacts on file are current.

Expect a processing time of 5-7 business days depending on workloads

Contract Requirements

- Effective August 1, 2024, Participating Contractors must generate a project contract for **all** EmPower+ projects, even if the Program is paying for 100% of the project cost.
- Contracts must be drafted in accordance with the requirements set forth in the Residential Contractor Participation Agreement in Section 2.4 of the [Program Manual](#).
- A copy of the contract must be included as part of the final project submission paperwork.
- Section 8 of the Program Manual will be updated with a new version of the Forms Matrix outlining project paperwork requirements for each project type.

OTDA 2024 Projects with ASHP/GSHP (1 of 3)

IF an OTDA eligible project meets **ALL** the following requirements:

- Enrollment Incentives exceed \$20,000
- Includes an ASHP/GSHP
- Note requesting \$5,000 expanded Value Engineered Incentive

THEN review the current enrollment for IRA eligibility prior to completing work in NYHEP and BEFORE submitting for approval at Workscape Submission*. Follow the path based on IRA eligibility.

A. *Customer Address Eligible for IRA* field is **Yes**

Customer Address Eligible for IRA
Yes

B. *Customer Address Eligible for IRA* field is **No** or **is blank** or **does not exist**

Customer Address Eligible for IRA **Customer Address Eligible for IRA** (enrollments created before 4/19/2024 do not have IRA field)
No

**If the enrollment is currently in Workscape Review and the OTDA project exceeds \$20,000, CLEAResult will automatically send the project back and include the instructions.*

OTDA 2024 Projects with ASHP/GSHP (2 of 3)

A. *Customer Address Eligible for IRA* field is **Yes**

- 1. Contractor:** For each enrollment submit as support ticket and include
 - Enrollment ID
 - Reason for change “*OTDA project exceeding cap, requesting change to IRA*”
- 2. CLEAResult** will review request and update NYHEP as needed
 - If necessary, roll back to Workscope Submission
- 3. Contractor:** Review enrollment
 - Ensure IRA incentives are enabled
 - Rework project cost allocation
 - Indicate in notes that project is seeking the Value Engineered Incentives
 - Add any required documentation per [Section 5.10 of the Program Manual](#)
 - Resubmit for approval

OTDA 2024 Projects with ASHP/GSHP (3 of 3)

B. *Customer Address Eligible for IRA* field is **No** or is **blank** or **does not exist**

- 1. Contractor:** For each enrollment submit as support ticket and include
 - Enrollment ID
 - Reason for change *“OTDA project exceeding cap, requesting change to IRA”*
- 2. CLEAResult** will review request and initiate an IRA application confirmation with TRC
 - If IRA application confirmed, update NYHEP and roll enrollment back to Workscope Submission
 - If a New enrollment was needed, assign to contractor and close previous enrollment
- 3. Contractor:** Review enrollment or complete new one
 - Ensure IRA incentives are enabled
 - Rework project cost allocation
 - Indicate in notes that project is seeking the Value Engineered Incentives
 - Add any required documentation per [Section 5.10 of the Program Manual](#)
 - Resubmit for approval

Avoiding Common Mistakes with Heat Pump Projects

Top 5 Modeling Errors Encountered with Heat Pump Projects

- NYHEP inputs for existing conditions don't match Manual J inputs.
- Utility usage for delivered fuel or electric consumption on provided bills do not match usage in NYHEP.
- If an Alternate Funding Source (i.e., 3rd party funding (HeatSmart), Utility Contribution (PSEG/National Grid LMI)) is indicated on a measure, upload associated documents and include a note of the funding breakdown.
- Note requesting additional incentives when the Value Engineering Strategies requirements are satisfied for Projects that exceed the Project's Incentive Cap
- Missing Documentation included in [Section 5.10 Heat Pump Requirements](#) of the Program Manual
 - Manual J or other ACCA approved sizing software
 - Manual S or equivalent sizing software such as NEEP sizing or the manufacturer sizing software
 - Manual D as per ANSI/ACCA 1 Manual D 2016 with AHRI Certification Document. (For new ductwork and additional ductwork on existing systems) or Supportive documentation as stated when using existing distribution.

Utility Bill/Usage Estimates for Heat Pumps Projects (1 of 2)

NYHEP Inputs

Delivered Fuel and Electric Usage Information (Workscope Submission - Usage & Fuel Information)

- Calculating 12 months of usage from graph or the usage table provided by the Utility company.
 - These inputs should be reflected in NYHEP
- Calculating 12 months of usage for the delivered fuel
 - These inputs should be reflected in NYHEP
- Overestimating usage can negatively impact project savings.
- Note in NYHEP can be helpful to provide insight as to how the usages were determined and modeled in NYHEP.

Delivered Fuel Information		
Delivered Fuel Oil	Delivered Fuel Supplier	Unit Type Gallon
Price Per Unit \$4.4100	Annual Delivered Fuel Usage 1020	

Electric Usage Information		
**Annual Electric Usage (kWh) 3790.0000	**Electrical Panel Box Size (amps) 100	**Electric Panel Type Breakers

Method of determining usage when lacking accurate records for delivered fuels.

- Manual J
 - The Manual J calculates peak loads for a given interior and exterior temperature. The assumption is that load is directly proportional to the difference between interior and exterior temperature.
 - If you take the BTU/hr at peak and multiply by 24 you get BTU/day. If you divide that by the degree difference between inside and outside on the design day, you get BTU/degree-day.
 - Multiply the BTU/degree-day by the degree-days to BTU/year
 - Divide BTU/year by BTU/unit of fuel to determine total unit of fuel used for year
- Reminder to be conservative

Utility Bill/Usage Estimates for Heat Pumps Projects (2 of 2)

- Resources available for contractors

- [Weatherdatadepot](#)
- [Degreedays.net](#)

- EXAMPLE:

- Peak BTU from Manual J is 48500
- #2 Oil as primary fuel
- Design Temp of 5 Degrees

Station:	BINGHAMTON REGIONAL AIRPORT, NY, US (75.98W,42.21N)						
Station ID:	KBGM						
		%					
Month starting	HDD 65	Estimated		Monthly usage		Yearly usage	
7/1/2023	15.7	0		2.183369		48500	Peak BTU
8/1/2023	50.4	0.1		7.009032		24	hrs/Day
9/1/2023	167.2	0		23.25219		1164000	Total BTU/Day
10/1/2023	385.6	0		53.62466		60	Tempertature difference
11/1/2023	813.7	0		113.1597		19400	BTU/Degree day
12/1/2023	876.2	0		121.8515		6014.9	HDD
1/1/2024	1150.1	0		159.9422		116689060	BTU/Year
2/1/2024	955.9	0		132.9352		139500	Btu/ unit
3/1/2024	794.8	0.03		110.5313		836.4807168	Total usage of Oil
4/1/2024	515.4	0		71.6757			
5/1/2024	203.7	0.03		28.32817			
6/1/2024	86.2	0.8		11.98767			
	6014.9					836.4807	Total usage of Oil

Comfort Home

Comfort Home System Update

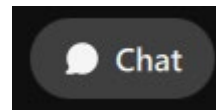
In early 2024, we announced a mid-year upgrade from Compass to NYHEP.

We heard your feedback about usability, system efficiency, and a desire to keep Comfort Home as simple as possible.

- We've built more time into our schedule for testing.
- We challenged the team to streamline as much as possible.
- We're including a soft transition / ramp up period with training and extended support.
- We're planning to migrate approved work from Compass to NYHEP.

2024			2025
October	November	December	
<p>Comfort Home in NYHEP available to contractors.</p> <p>Comfort Home jobs can be submitted in either Compass or NYHEP.</p>	<p>Comfort Home in NYHEP available to contractors.</p> <p>Comfort Home jobs can be submitted in either Compass or NYHEP.</p> <p>All work started in Compass must be submitted for approval.</p>	<p>All Comfort Home work must be submitted in NYHEP.</p> <p>Assessments approved in Compass will be available in NYHEP to add a load reduction package.</p> <p>Load reduction packages approved in Compass will be available in NYHEP to add a heat pump.</p>	<p>NYSERDA planning to rollout federal IRA HEAR and HER program incentives in early 2025.</p>

2024			2025
October	November	December	
<p>Comfort Home in NYHEP available to contractors.</p> <p>Comfort Home jobs can be submitted in either Compass or NYHEP.</p>	<p>Comfort Home in NYHEP available to contractors.</p> <p>Comfort Home jobs can be submitted in either Compass or NYHEP.</p> <p>All work started in Compass must be submitted for approval.</p>	<p>All Comfort Home work must be submitted in NYHEP.</p> <p>Assessments approved in Compass will be available in NYHEP to add a load reduction package.</p> <p>Load reduction packages approved in Compass will be available in NYHEP to add a heat pump.</p>	<p>NYSERDA planning to rollout federal IRA HEAR and HER program incentives in early 2025.</p>



- Use the **WebEx Chat** feature
- We'd like to hear your ideas and feedback about this transition.
- What can we do to make this as easy as possible for you?
- What kind of training do you prefer: PDF quick start guide? Live webinar? Recorded webinar? Office hours with webinar for open Q&A? Other?

Customer Release Form Update

The Residential Energy Assessment (REA) Program will have a similar update – watch for that in the program update email

A revised Comfort Home customer release form is now available on SharePoint.

One change: Updated release authorization allowing NYSERDA to share project information with the customer's utilities and Department of Public Service.

We will email a PDF copy to all contractors today.

Release forms submitted on or after August 26, 2024 will need to use the new form.

Contact us:

Keith Bohling, Sr. Project Manager

keith.bohling@nyserderda.ny.gov

Operations:

1-888-406-4009

ComfortHome@nyserderda.ny.gov

nyserderda.ny.gov/ComfortHome



NYSERDA

Standards and Quality Assurance

Background on Quality Home Contractor Designation

- Long-standing Residential Single-Family QA activities (field inspections), provide a tremendous amount of experience and data to objectively understand how well Residential Single-Family contractors are performing.
- 203 companies are approved to participate in the Residential Single-Family Program
- The SQA team and the SFR team members met to discuss:
 - How can we reward contractors who are consistently installing quality systems?

Answer: Quality Home Contractor Designation!

What is the Quality Home Contractor Designation?

This is a designation given to high quality residential contractors who consistently exceed the annual quality assurance criteria in the Residential Single-Family Program.

In a calendar year, contractors need to meet for exceed the following guidelines:

- Active Contractors
- Full Status
- Installed at least 12 projects
- Have an average QA field inspection score of 4.0, without rounding up, or greater on a 1-5 scale

What is the Motivation to obtain Quality Home Contractor Designation?

Contractors can use this designation as a **third-party differentiator** and **validation of the quality** of their work with customers and prospective customers.

Designated contractors are recognized in a **special listing on the Residential Single-Family website** and receive a **NYSERDA Quality Home Contractor Installer logo** to use in marketing materials.



NYSERDA

Quality Home Contractor
2025

Residential Single Family Qualification Data

Utilizing 2023 Quality Assurance in-field inspection data:

Number of active participating contractor: 177

Number of active participating contractors who qualify for QCH: 73.4%

The designated QHC builders installed 92.9% of all projects in 2023.

NY-Sun Quality Solar Installer Comparison

Launched in 2019.

How can we reward builders who are consistently installing quality systems?

New in 2021: additional **Gold Status** for builders that have achieved Quality Solar Installer designation three consecutive years.

NEW in 2024: additional **Platinum Status** for builders that have achieved Quality Solar Installer designation six consecutive years.

NY-Sun QSI Comparison

The designated QSI builders installed 63% of all projects in 2023.
20% of all projects were installed by a QSI-Gold or Platinum builder.

25% of all active NY-Sun, Residential-Nonresidential builders
have the designation of Quality Solar Installer.

Of the 25% :

49% of the builders were once on Probation Status.

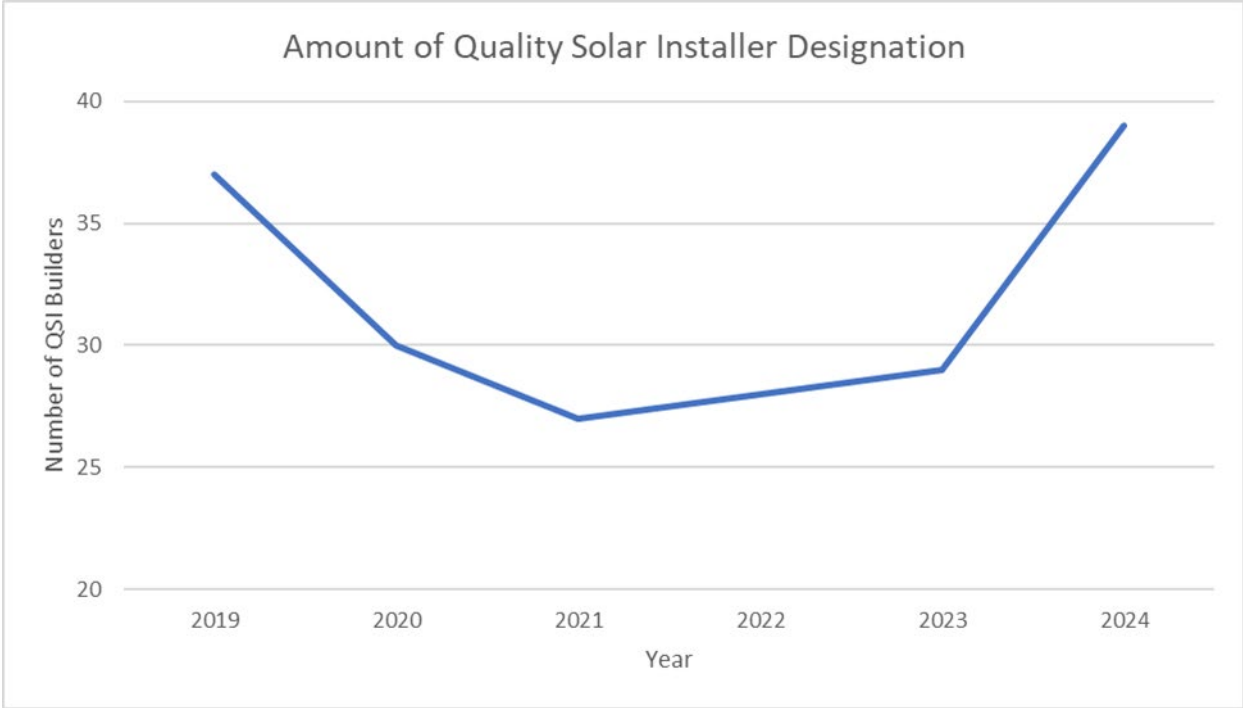
13% of the builders were once Suspended.

5% of QSI- Platinum were once on a disciplinary status.


10% of QSI- Gold were once on a disciplinary status.

The combined efforts of SQA and Program Staff of presenting a prescriptive plan and working directly with the builders has a positive effect on the market.

Yearly Quality Solar Installer Comparison




How Installers Use the Quality Solar Installer Designation Logos







HARVESTPOWER






OUR ACCOLADES



2016, 2017, 2018 & 2019



OUR BRANDS



CONTACT INFO GET STARTED TODAY! LET'S GET STARTED!

Breaking: Kasselmann Solar Awarded 2019 NYSEDA Quality Solar Installer For Industry Leading Craftsmanship, Quality, & Customer Service!
[View this email in your browser](#)



BREAKING: Kasselmann Solar Awarded Prestigious 2019 NYSEDA Quality Installer Designation



In an effort to help New York homeowners identify high quality solar installers, NYSEDA has highlighted Kasselmann Solar as a model for exemplary craftsmanship, superior design, and exceptional service!



Questions?



NYSERDA