

Single Family Residential Program Update

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

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

November 1, 2024

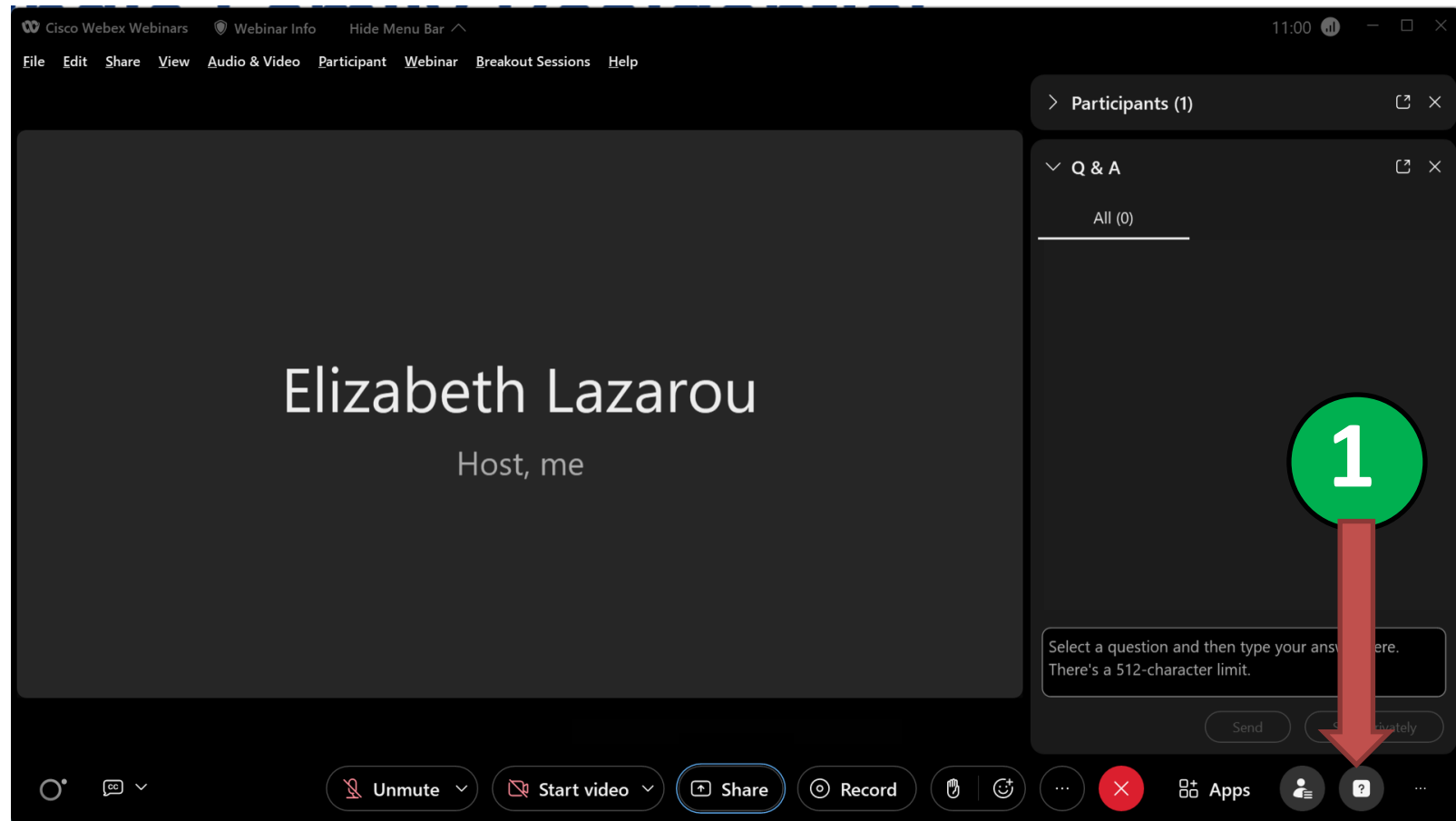


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Options for Q&A During Today's Webinar - Text

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.

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 'Participants' section shows a search bar and a list of participants, including 'Elizabeth Lazarou' (Host, me). The 'Panelists' section is currently empty. The 'Attendees' section shows 'No activities'. At the bottom of the screen, there is a toolbar with various icons. A green circle with the number '2' is placed over the 'raise hand' icon (a hand with a red dot on the palm), and a red arrow points from this circle down to the icon. Other icons in the toolbar include 'Unmute', 'Start video', 'Share', 'Record', and a red 'X' icon.

Agenda

Green Jobs-Green New York (GJGNY)

- Residential Financing Program
- Interest Rate changes

Appliance Upgrade Program

My Energy and NYHEP Updates

Comfort Home

- NYHEP Transition

EmPower+

- Income limits updates
- Text Message to Case/Support
- Dense Packing Update
- Spray Foam Certification Training



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Green Jobs-Green New York Residential Financing Program

Points of Discussion

- Interest Rate Updates
- Bridge Loans
- Key Takeaways

Interest Rate Updates as of November 1st

New Rates Effective for Applications Received On or After November 1, 2024		
	SEL paid by ACH	SEL paid by check & OBR
<=80% AMI and DAC	4.0%	4.5%
>80% AMI	7.5%	8.0%

Interest Rate Updates as of November 1st

- **Recalibrated interest rates to better reflect market conditions:**
 - **Pre-November 1st:**
 - 3.99% and 7.49% (with the option of a 0.5% discount) for Smart Energy Loans and On-Bill Recovery Loans
 - **Shifting to as of November 1st:**
 - 4.5% and 8.00% for On-Bill Recovery Loans and Smart Energy Loans (with the option of a 0.5% discount for Smart Energy Loans)
- **.5% Rate Discount:**
 - **Pre-November 1st:**
 - Applicable towards Smart Energy Loans when paid by ACH and On-Bill Recovery Loans
 - **Shifting to as of November 1st:**
 - Applicable towards Smart Energy Loans when paid by ACH

Interest Rate Updates as of November 1st

- **Eligibility for the lower rates:**

- **Pre-November 1st:**

- Customers that reside within a “Designated Area,” a U.S. Census Block Group identified as where 50% or more of the population of the group has a household income of less than or equal to 120% Area Median Income (AMI)
- Customers can provide documentation proving that their household income is less than or equal to 120% AMI

- **Shifting to as of November 1st:**

- Customers that meet the New York State Disadvantaged Community Criteria
- Customers that reside within a “Designated Area”, a U.S. Census Block Group identified as where 50% or more of the population of the group has a household income of less than or equal to 80% AMI
- Customers can provide documentation proving that their household income is less than or equal to 80% AMI

Bridge Loans

- As of 12/1/24 we will no longer be offering Bridge Loans
- Reminder-No prepayment penalties on Smart Energy Loans or On-Bill Recovery Loans
- Decision was made with the best interest of both customers and the health of the loan fund in mind

Key Takeaways

- Interest rates for the program will change as of today, November 1st
- Criteria for interest rate approval will also change as of today, but the approval process itself will not change
- Bridge Loans will no longer be offered by the program as of December 1st
- Make sure that when creating ProFormas for your customers you use the correct application date so the right interest rates are available for selection within the ProForma
 - Slipstream has included this date within your customer's VelocityGo accounts
 - Reach out to Slipstream with any questions relating to where in VelocityGo this is located

Questions/Contacts

For questions on the Residential Financing Program please contact:

Heather J. Clark, Assistant Director at heather.clark@nyserda.ny.gov

Kevin L. Hunt, Senior Project Manager at kevin.hunt@nyserda.ny.gov

Lucia Cappiello, Assistant Financial Analyst at lucia.cappiello@nyserda.ny.gov

Appliance Upgrade Program (AUP)



Appliance Upgrade Program (AUP) Contractor Enrollment

Ryan Moore and Nicole Munz November 1, 2024

Home Electrification and Appliance Rebates (HEAR)

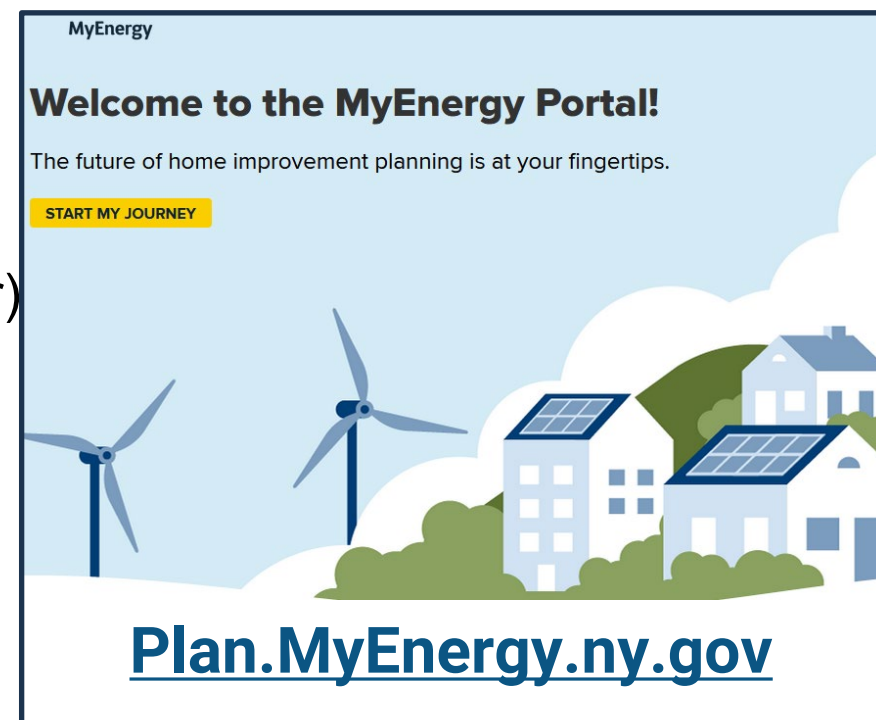


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Appliance Upgrade Program Overview

Retail point-of-sale program launched in October 2024 in the new MyEnergy Portal

- Customers below 150% AMI are eligible to receive rebates
- Rebates available for:
 - ENERGY STAR® certified heat pump clothes dryers**
(including all-in-one washer-dryers with a heat pump dryer)
 - Electrical wiring and panel upgrades** (if necessary for the appliance installation)
- NYSERDA is currently recruiting **retailers** and **contractors** through **PON 5859**: Application for Retailer and Contractor Enrollment



HEAR Eligible Measures and Rebate Amounts

Measure Type	Maximum Rebate Amount Per Dwelling Unit	80-150% AMI	<80% AMI
Heat Pump Water Heater	\$1,750	Up to 50% of qualified project cost	Up to 100% of qualified project cost
Heat Pump Heating & Cooling	\$8,000		
Induction Cooking Appliance	\$840		
Heat Pump Clothes Dryer	\$840		
Electrical Service Upgrade	\$4,000		
Electrical Wiring Upgrade	\$2,500		
Insulation, Air Sealing, Ventilation	\$1,600		
<u>Maximum per dwelling unit</u>	<u>\$14,000</u>		
Multifamily buildings require “not less than 50%” of households to meet the eligible income level to qualify			
Additional Participating Contractor (PC) incentive up to \$500/dwelling unit, which includes a \$200/dwelling unit DAC incentive to PCs.			
Appliances, systems, equipment, infrastructure, and components must be ENERGY STAR® certified (where applicable)			

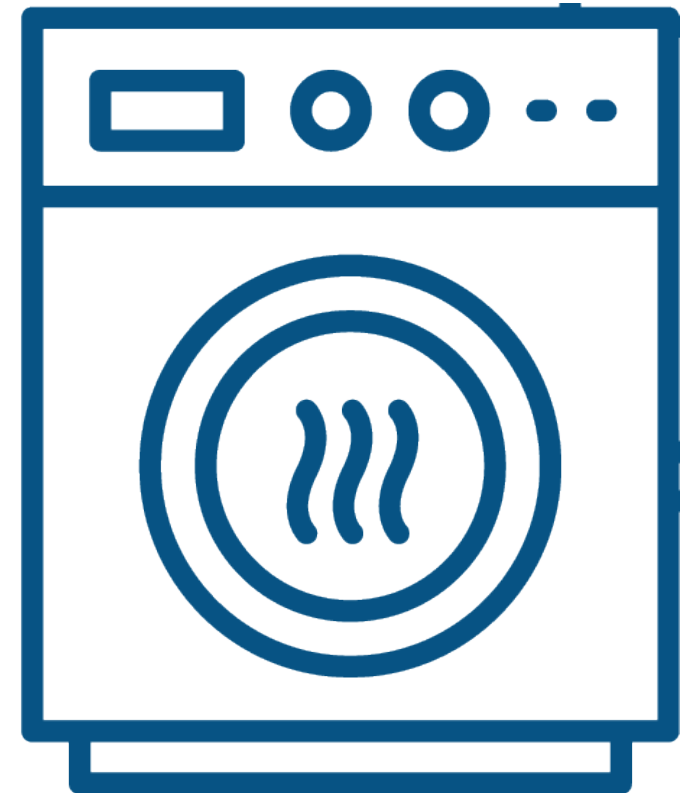
Appliance Upgrade Program Contractor Recruitment - Overview

The Program seeks to enroll the following trades as **Participating Contractors**:

- > Appliance installers
- > Electricians (licensed and unlicensed, per municipality)
- > Plumbers (licensed)

Participating Contractors are eligible to receive installation incentives up to **\$500/dwelling unit**:

- > \$150/dwelling unit for the installation of one measure; OR
- > \$300/dwelling unit for the installation of two or more measures; plus
- > \$200/dwelling unit for the installation located within a disadvantaged community (DAC)

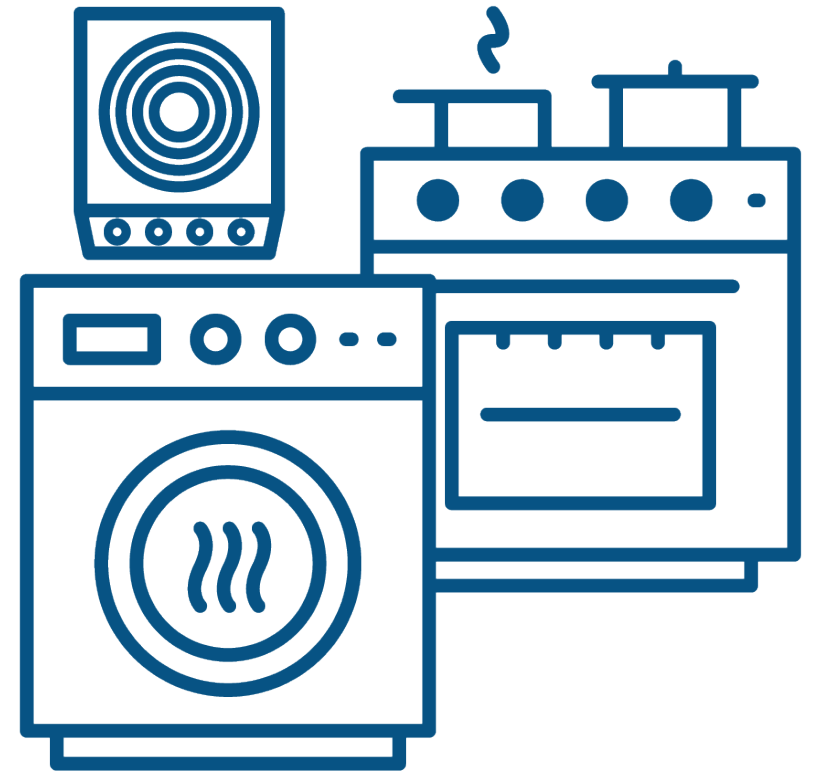


Appliance Upgrade Program

Contractor Recruitment - Enrollment

Follow these steps to enroll as a Participating Contractor in AUP:

1. Submit a [Contractor Application](#), which includes:
 - > Signed Contractor Participation Agreement
 - > Company W-9
 - > Certificate of Insurance (COI)
 - > License(s) (if applicable)
2. Receive an email from IRAretail@nyserda.ny.gov and follow next steps (within 7-10 business days of application receipt)
3. Participate in **training** to complete onboarding



Questions?

Email: IRAretail@nyserderda.ny.gov



My Energy and NYHEP

MyEnergy - EmPower+ Applications

All existing and new EmPower+ applications will continue to use the current system until the migration to MyEnergy is complete on **November 21, 2024**.

- Until then, the EmPower+ application page from MyEnergy will redirect you to the current EmPower+ application page
- Once launched, **new applications** must be submitted through My Energy. All applications submitted prior will be brought over to the new system.
- Existing **in-progress** applications will need to be submitted through the current system.

MyEnergy - EmPower+ Training

Training is underway. If you haven't registered for a session, please do so. Recordings will be made available soon. Supporting materials for the EmPower+ Program will be available in the NYSERDA Knowledge Base by November 21, 2024.

- Training Session 3: Wednesday, November 6 from 9:00 to 10:00 a.m. ET ([Register Here](#))
- Training Session 4: Thursday, November 7 from 4:00 to 5:00 p.m. ET ([Register Here](#))
- Training Session 5: Tuesday, November 12 from 10:00 a.m. to 11:30 a.m. ET ([Register Here](#))
- Training Session 6: Thursday, November 14 from 2:00 p.m. to 3:30 p.m. ET ([Register Here](#))

NYHEP – October 30 Updates

The following NYHEP updates are now live:

- Default setting on new notes will share with everyone
- Tab navigation will move from the bottom left to the top right
- Red Exclamation warnings will persist until all issues are resolved
- Scroll to Top button
- Expand/Collapse buttons for groups of fields/data input
- Other performance and backend improvements

NYHEP – 8.0 Enhancements

- **Ability to change the default settings on notes to everyone with access to an enrollment – this will allow one contractor to view the next contractor’s notes unless they physically change the toggle.**

When a user navigates to a Workflow Step, all Notes will be configured to default to the “Users with access to this enrollment”. This will enable other contractors/vendors on the project to be able to see their note. If they want to restrict visibility to only themselves, NYSERDA, implementation teams (including Hubs), they should manually select “Users with access to this workflow step”.

The screenshot displays the 'Workscope Submission Workflow Step - Notes' interface. At the top, there is a header bar with the title 'Workscope Submission Workflow Step - Notes' and a 'New Note' button with a plus icon and a 'Close' button with a minus icon. Below the header, there is a 'Workflow Step Note' section with a close button (X). The main content area is titled 'Create New - Note' and contains a 'Save' button with a floppy disk icon, a 'Delete' button with an X icon, and a 'Close' button with a plus icon. The form includes two input fields: 'Note Date' with the value '10/30/2024' and a calendar icon, and 'Note Time' with the value '5:47 PM'. Below these fields is a large text area for 'Notes'. At the bottom, there is a section titled 'Who can view this note?' with three radio button options: 'Users with access to this enrollment' (selected), 'Users with access to this workflow step', and 'This is an Interaction'.

- Move the tab navigation from the lower left side of the screen to the upper right.

Navigation tabs used to be on the lower left so depending on screen settings user would have to scroll down to get to the tabs, they have been moved to the upper right.

OLD

Main Menu >> Enrollments >> Enrollment >> Workflow >> Application

Workflow Step Summary

Program
EmPower+

Account #: [999999000045293](#)
Enrollment #: 1050020
Reference #: 1050020
Status: Cancelled

Customer: test test
Customer Class: Residential
Premise Id: 999999000045293

Premise Account(s):

Applicant
test, test
8170 Thompson Rd
Cicero, NY 13039

County: Onondaga
[Driving Directions](#)

Workscope Submission -

[Re-Open Application](#) [Proc](#)

Processing Information
Community Hub - Trade Al

On Hold Information

General Information

Application Date
01/22/2024

Project Description

Customer Information

Account Number
999999000045293

Account Name
test test

Primary Phone

Cell Phone

Migrated Mailing Unit

Installation Address

Premise ID
999999000045293

Street: 8170 Thompson Rd
Cicero, NY 13039

Applicant Information

Last Name
test

Primary Phone

Applicant Information

- Usage & Fuel Information
- Existing Conditions
- Partner Information
- Other Information
- Notes (0)
- Documents (0)
- Measures (0)
- Reports (3)
- Application History

NEW

Main Menu >> Enrollments >> Enrollment >> Workflow >> Application

Workflow Step Summary

Program
EmPower+

Account #: [999999000050358](#)
Enrollment #: 1057155
Reference #: 1057155
Status: New

Customer: Test Ten
Customer Class: Residential
Premise Id: 999999000050358

Applicant
Ten, Test
6 Orchard Pl
Hopewell Junction, NY 12533
(565) 555-5555

County: Dutchess

Workscope Submission - Applicant Information - New

[Process](#) [Save](#) [Close](#) [Expand All](#) [Collapse All](#) [Enrollment Profile](#) [New Appliance Enrollment](#) [Double Dip Report](#) [Update Customer](#)

Processing Information

Community Hub - Trade Ally **Community Hub - Employee** **Outcome** **Reason**

(Click to Select) (Click to Select) Work Complete (Click to Select)

On Hold Information

General Information

Application Date **Reference Number** **Due Date**

08/09/2024 1057155 9/8/2024

Project Description **Total Project Cost**

\$0.00

Customer Information

Applicant Information

- Usage & Fuel Information
- Existing Conditions
- Partner Information
- Other Information
- Notes (1)
- Documents (0)
- Measures (19)
- Overrides
- Reports (1)
- Application History

- **Defaulting the Customer Class and Account Class fields on customer and account records to the only option available – Residential (this only impacts REA since EmPower+ is handled by the Salesforce API).**

When creating Customers and Accounts for REA projects, the user always had to select “residential” from the Customer Class and Account Class fields, now it will be defaulted so they don’t have to click.

The image shows two screenshots of a web application interface. The top screenshot is titled "Customer" and features a header bar with "Save", "Delete", and "Close" buttons. Below the header, the "Customer Attributes" section contains a "Customer Number" field, a "Customer Name" text input, and a "Customer Class" dropdown menu currently set to "Residential". The "Premise Address" section is partially visible below. The bottom screenshot shows the "Account Attributes" section, which includes three unchecked checkboxes: "Major Account", "Group Bill Account", and "My Account". Below these is an "Account Class" dropdown menu set to "Residential", followed by a "NAICS" text input field and the label "Group Bill Account Number".

- **Allowing the Red Exclamation point warnings to remain while the user navigates around the project (i.e., clicking onto another tab will no longer make the warning disappear).**

I'm not sure how to demonstrate this one in a screenshot because the Red Exclamation is existing functionality, it's more just that it will remain visible through more clicks in the system without having to relick the process button. I gave you two screens through, one minimized and one expanded.

The image displays two screenshots of a software interface titled "Workscope Submission - Applicant Information - New".

The top screenshot shows the "Processing Information" section. A red exclamation point icon is visible in the top right corner of the content area, indicating a warning.

The bottom screenshot shows the "Warning" section expanded. The warning message is:

- Workflow step has not passed validation and could not be moved to the next step.

The warning details are as follows:

Applicant Information Section:

- Assessment Fee measure MUST be included on Workscope Submission
- Blower Door Test In measures MUST be included on Workscope Submission
- CAZ Test In measures MUST be included on Workscope Submission
- Energy Education measure MUST be included on Workscope Submission
- Funding Info Measure MUST be included on Workscope Submission
- Mileage measure MUST be included on Workscope Submission

Existing Conditions Section:

- Cooling Capacity (BTUh) is required.
- Stories Above Grade is required.
- Primary Heating Total Duct Length (feet) is required.
- Primary Heating Duct Length Unconditioned (feet) is required.

A red exclamation point icon is also present in the top right corner of the warning box.

- **Scroll to Top button** – as a user scrolls, there will be a clickable arrow at the bottom of the page that lets them jump to the top.

	Veteran or Disabled Veteran 0	Approved Income Tier 1	Referral Source Self Referral
	Details Provided by Customer	Application Assistant Adirondack North Country Association	Application Number 705119

↑

- **Expand/Collapse buttons** – at the top of each Workflow page, there will be Expand All and Collapse All buttons that will help users control how much information they’re seeing at a time.
- **Expand/Collapse Section** – each group of fields (surrounded by an outline) on most pages of a project can be clicked to collapse and clicked again to expand it.

Clicking the Collapse All button:

The screenshot shows the 'Workscope Submission - Applicant Information - New' page. The top navigation bar includes 'Process', 'Save', 'Close', 'Expand All', 'Collapse All', 'Enrollment Profile', and 'New Appliance Enrollment'. The main content area consists of a vertical list of section headers, all of which are collapsed: Processing Information, On Hold Information, General Information, Customer Information, Installation Address, Applicant Information, Mailing Address, Additional Applicant Information, Owner Information, Trade Ally Information, Payee, Workscope Submission Validation and Calculations, and Comments.

Expanding any one of those sections by clicking the title of the section:

The screenshot shows the 'Workscope Submission - Applicant Information - New' page with the 'General Information' section expanded. The expanded section contains the following fields:

- Application Date:** 10/07/2024
- Reference Number:** 1057394
- Due Date:** 11/6/2024
- Project Description:** (empty text field)
- Total Project Cost:** \$0.00

 The other sections remain collapsed.

Clicking the Expand All button:

The screenshot shows the 'Workscope Submission - Applicant Information - New' page with all sections expanded. The top navigation bar includes 'Process', 'Save', 'Close', 'Expand All', 'Collapse All', 'Enrollment Profile', 'New Appliance Enrollment', 'Double Dip Report', and 'Update C'. The expanded sections contain the following information:

- Processing Information:** Community Hub - Trade Ally, Community Hub - Employee, Outcome: Work Complete, Reason: (Click to Select)
- On Hold Information:** (empty section)
- General Information:** Application Date: 10/07/2024, Reference Number: 1057394, Due Date: 11/6/2024; Project Description: (empty), Total Project Cost: \$0.00
- Customer Information:** Account Number: 1234567890; Account Name: Test Watkins; Email: (empty); Primary Phone: (111) 111-1111; Alt Phone: (222) 222-2222; Cell Phone: 333-333-3333; Migrated Account Number: (empty); Migrated Mailing Unit: (empty); Migrated Location Unit: (empty)
- Installation Address:** Premise ID: 405354; Street: 263 San Carlos St.; City: Oswego; State: NY; Zip: 13126; Unit: (empty)
- Applicant Information:** Last Name: OwnerTestTest; First Name: Home; Email: (empty); Primary Phone: (412) 412-1213; Alt Phone: (222) 222-2222; Fax: (empty); Primary Language: English
- Mailing Address:** Mailing Address is the same as Installation Address

Comfort Home

Comfort Home System Update

- Testing is underway.
- Optimization taking place to streamline the data entry as much as possible while still meeting our reporting requirements.
- This week we removed the electric and fossil fuel consumption fields as they aren't required for our reporting or modeling.
- Our original schedule has moved outward.
- We are still planning for a soft transition period during which contractors can use NYHEP or Compass before the firm cutover to NYHEP

EmPower+

Income Limits



NYSERDA

Updated Income Limits

- The income limits for EmPower+ have been updated and are effective as of October 17, 2024.
- These income limits are based on 2024-2025 State Median Income numbers provided by the Home Energy Assistance Program (HEAP) and 2024 Area Median Income numbers provided by The Department of Housing and Urban Development (HUD).
- The updated guidelines can be found in Section 3.4 of the [Program Manual](#).
- Program materials have been updated to reflect these changes and the NYSERDA webpages are in the process of being updated and should be live within the week.

Dense Packing Update



NYSERDA

EmPower+ Policy Update: Dense Packing Wall Cavities or Ceiling Slopes

Policy Update – Effective December 1, 2024

- The EmPower+ Program will no longer provide incentives for the dense packing of wall cavities or ceiling slopes where the proposed cavity includes pre-existing insulation that does not allow for the proper installation of the proposed material to achieve the final R-value according to the insulation manufacturer specifications and workscope submitted to Program.

Why is this change taking place?

- Dense packed wall inspections have shown that the wall may not be properly insulated when there is not enough space to move the insulation tube in the wall. This results in the measure not achieving the final R-value based on the approved workscope and unnecessary measure costs that do not meet the estimated savings.

When does this become effective?

- New enrollments submitted to Workscope Review on or after December 1, 2024.
- In NYHEP this is the Application Submission Date on the Enrollment Summary page. →

What wall cavities or ceiling slopes can be dense packed?

- Proposed cavities must have a minimum void depth of 2 inches to be eligible for incentives.

Main Menu >> Enrollments >> Enrollment >>

Enrollment Summary

Program
[EmPower+](#)

Account #: [REDACTED]
Enrollment #: [REDACTED]
Reference #: [REDACTED]
Status: Open
Contractor
Reassignments: 0

Application Submission Date: 10/31/2024

EmPower+ Policy Update: Dense Packing Wall Cavities or Ceiling Slopes

Building component example that does **NOT qualify:**

- 2x4 wall cavity that has 2 inches (or more) of pre-existing fiberglass insulation.

Building component example that **DOES qualify:**

- 2x6 wall cavity that has 3 inches (or less) of pre-existing fiberglass insulation.

Floor cavities located above an attached or tuck under garage, above unconditioned spaces, and cantilevers are exempt from this Program rule. Contractors still must verify there is space in the existing cavity to add the proposed insulation upgrade by providing photos of the available space in the floor cavities.

How do contractors comply with this?

- Contractors must conduct a thorough assessment of wall cavities or ceiling slopes before proposing these areas for additional insulation work.
 - The assessment must document the type, condition, and R-value of the existing insulation and be included in the Existing Conditions section of the Workslope Submission step in NYHEP.

EmPower+ Policy Update: Dense Packing Wall Cavities or Ceiling Slopes

What do contractors need to do in NYHEP when submitting enrollments that include dense packing wall cavities or ceiling slopes?

Workscope Submission

- All wall cavities or ceiling slopes insulation proposals involving pre-existing insulation must be submitted for approval during the workscope submission.
 - Clear photos of the open space in the cavity, via a borescope or other industry practice(s).
 - IR camera images alone will not be accepted.
 - Photos must be submitted in NYHEP at the Workscope Submission workflow step.

Final Project Submission

- Post-installation photos must be provided to verify compliance with the approved proposal and manufacturer specifications. These geo-tagged photos must be included in the single PDF submitted.
 - Clear photo of installed insulation prior to sealing off wall cavity or ceiling slope access point.

Spray Foam Requirements



NYSERDA

Spray Foam Requirements

Why new trainings?

- To ensure projects are completed in a safe manor.
- Spray foam is more challenging measure to install.
- Protect the customers, contractors and NYSERDA.
- Increase in project concerns.

Spray Foam Requirements

TRAINING CLASS	Field Employee	Applicator	Crew Leader	Auditor	Time	Focuses on:
**CPI High Pressure Spray Polyurethane Foam Health & Safety	X	X	X		2 hrs, online, on demand	Health & Safety
OSHA Hazard Communications Standard	X	X	X		~2 hrs, online or in person	Health & Safety
Proprietary Manufacturer, Distributor, or Trade Association Training		X	X		Varies, in person	Health & Safety, Troubleshooting, Quality Assurance
PSD Don't Be Left Exposed Part 1 Part 2			X	X	3 hrs, online, check schedule	Code Compliance, Quality Assurance
OSHA 30 or Confined Space/Fire Safety			X		30hrs, online or in person	Health & Safety
BPI Building Science Principles			X		Varies, online, on demand	Building Science Principles

- Trainings must be completed before October 1, 2025.
- Contractors are required to keep documentation of all staff that attended the trainings. Documentation must include the training title, staff names, and dates the training was completed. At NYSERDA's request contractors must submit the training documentation within 48 hours of request.
- Contractors will be required to submit a sign document that their company meets the new training requirements.

Spray Foam Requirements

Trainings	Estimated Cost	Length
CPI Spray Foam	None	2-3 hours
OSHA Hazard	\$100	2 hours
Manufacturer Training	None	2 hours
Don't Be Left Exposed	None	2 hours
OSHA 30	\$200 online/\$900 in person	30 hours
BPI BSP	\$200	2 hours

Spray Foam Requirements

Staff	Estimated cost	Length
Field Employee	\$100	5 hours
Applicator	\$100	6 hours
Crew Leader	\$500	Under 50 hours
Auditor	None	3 hours

Spray Foam Requirements

Next Steps

- Training information will be sent out as an announcement soon.
- Contractor sign off document will be posted to Contractor Support site.

Reminders



NYSERDA

Chat Functionality



Chat

* First Name
John

* Last Name
Smith

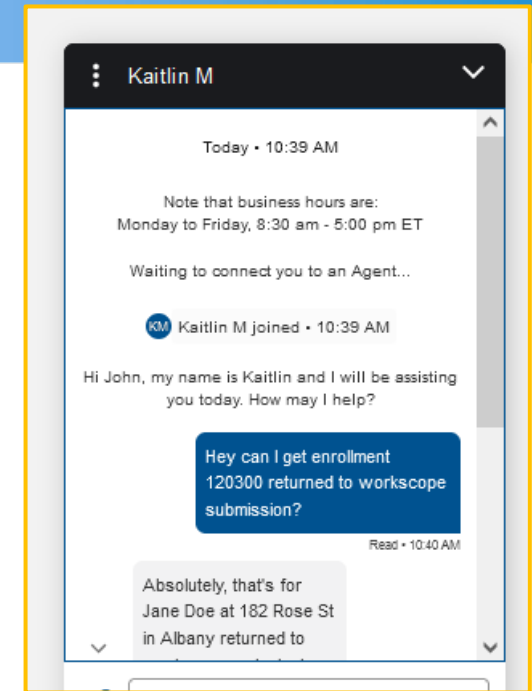
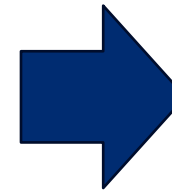
* Email
jsmith@contractor.com

* Phone Number
8321230000

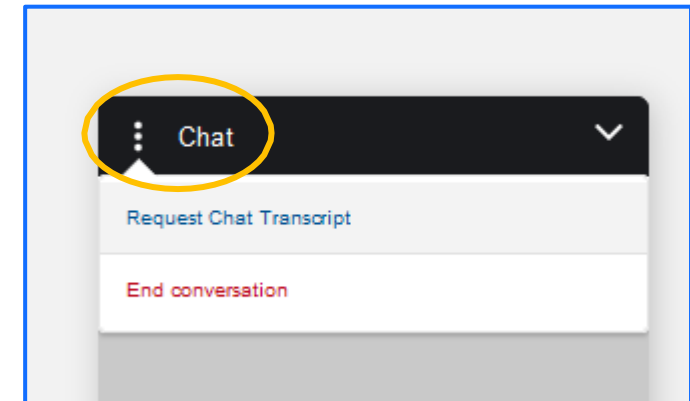
* Subject
Roll back project to workscope

Application Number

Start Conversation



Click the **chat button** in the **lower right corner** of the Contractor Support Site to begin a chat session with an agent. When completed with the chat, click the three dots at the top and select **End conversation**.



Questions?



NYSERDA