

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

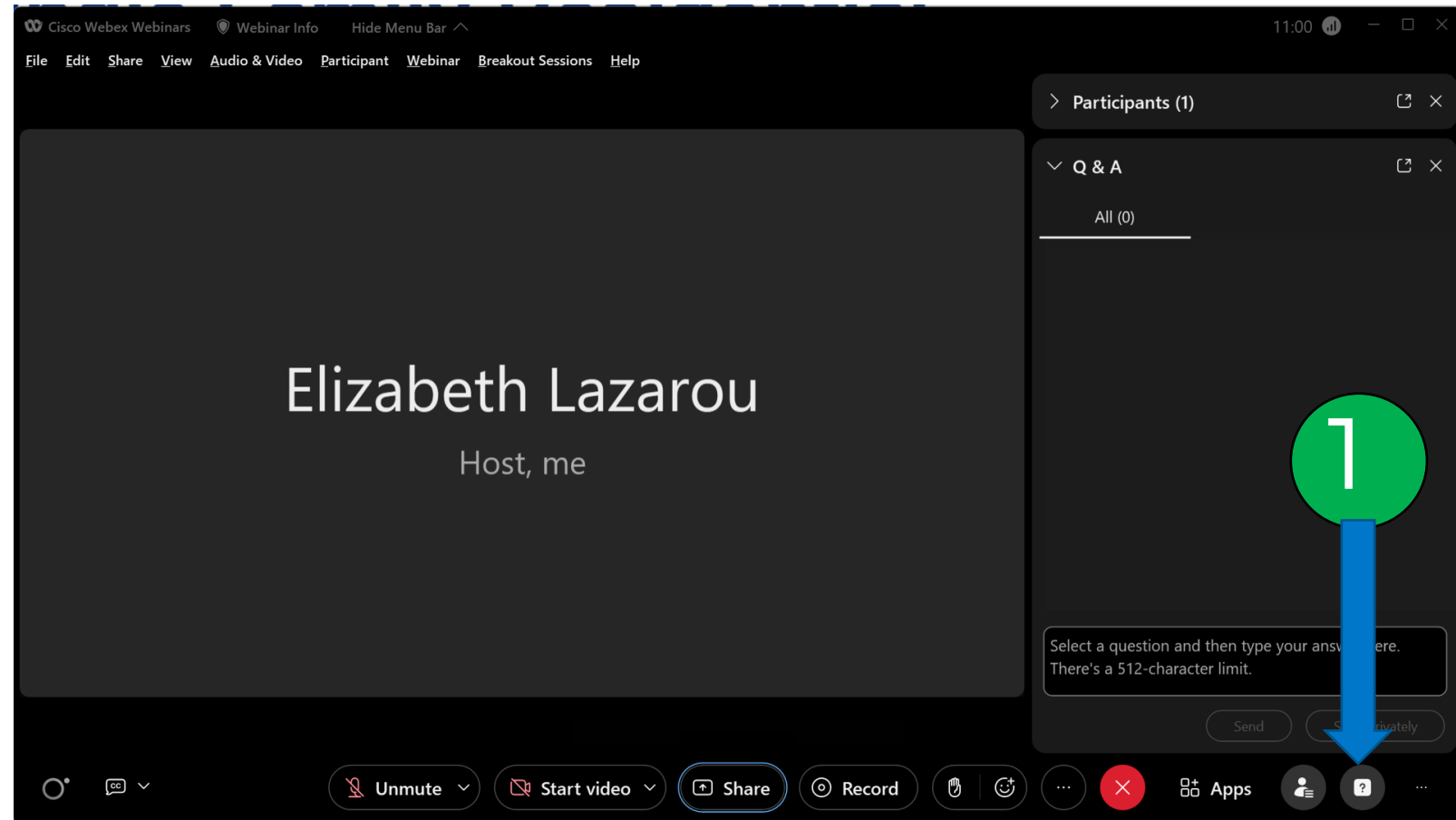
February 7th 2025



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."



The screenshot displays the Cisco Webex Webinar interface. The main content area shows the name "Elizabeth Lazarou" and the role "Host, me". On the right side, there is a sidebar with a "Q & A" section. A green circle with the number "1" is overlaid on the question mark icon in the bottom right corner of the interface, with a blue arrow pointing down to the "Q & A" section. The "Q & A" section is currently empty, showing "All (0)". Below the "Q & A" section, there is a text input field with the placeholder text "Select a question and then type your answer here. There's a 512-character limit." and buttons for "Send" and "Send privately". The bottom toolbar includes icons for "Unmute", "Start video", "Share", "Record", and "Apps".

Format of Q&A During Today's Webinar

Topic: [Type your question]

- > Please list your topic first followed by a colon sign.
- > Text your question pertaining to the topic after the colon sign.
- > This will allow the Host to organize the questions to be in line with the topic being presented. Questions not answered during the call should be sent to contractor support.

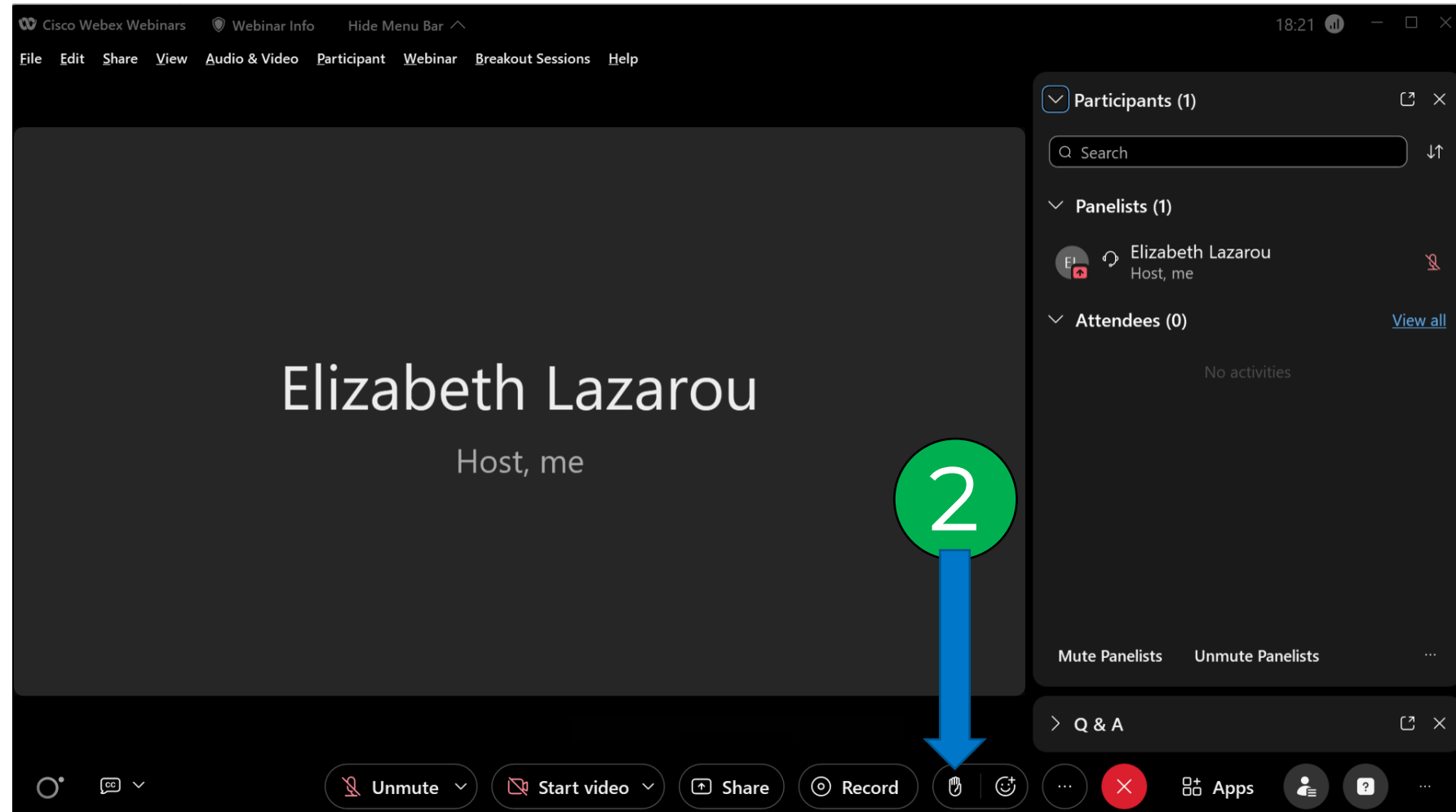


Comfort Home: will the deadline for the new incentives be extended?
from Uthman Aziz to everyone: 1:24 PM
EmPower+: How will new applications be processed after MyEnergy roll out?
from Uthman Aziz to everyone: 1:28 PM
NYHEP: How do we confirm if a customer is getting OTDA funding or IRA funding?
from Uthman Aziz to everyone: 1:34 PM
REA: How will the new testing requirements be implemented?
from Uthman Aziz to everyone: 1:35 PM
GJGNY:

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.

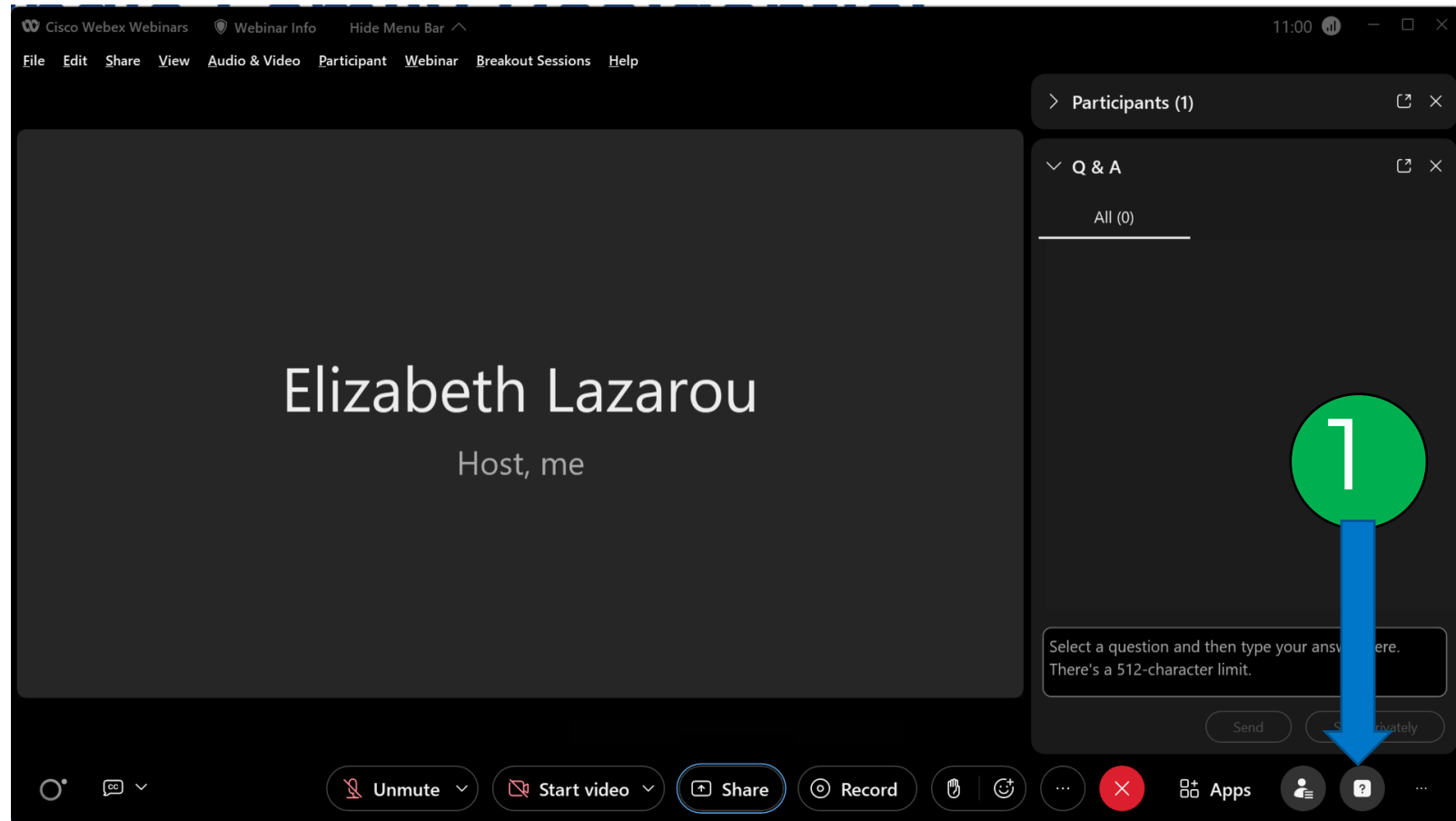


The screenshot displays the Cisco Webex Webinar interface. The main content area shows the name 'Elizabeth Lazarou' and the role 'Host, me'. The bottom toolbar contains several icons: a microphone icon (muted), a video icon (muted), a share icon, a record icon, a 'raise hand' icon (highlighted with a green circle and a blue arrow pointing to it), and a smiley face icon. The right sidebar shows the 'Participants (1)' list, which includes the host, Elizabeth Lazarou. Below the participants list, there are buttons for 'Mute Panelists' and 'Unmute Panelists'. At the bottom right, there is a 'Q & A' section.

Topic Specific Questions are Encouraged

Feel free to ask any general questions related to the topics presented.

Please note that specific inquiries and topics not covered during today's agenda, i.e., enrollment number or client name can be addressed through standard customer or contractor support options.



Who Do I Contact?

> Support questions should be directed to:

Customer Engagement and Enrollment Contractor

- Implementor: TRC
- 1-866-NYSERDA
- 1-877-NYSMART (Customer Support)
- 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



Today's Agenda:

EmPower+

- **IRA Update**
- **Case Escalations**
- **Project Aging**
- **Duplicate Applications**

Reminders

- **Contract Requirements**
- **Hub Coordination**
- **BPCA**

EmPower+

IRA Funding

- At this time, the EmPower+ and AUP programs are continuing to provide the DAC project incentives for IRA HEAR projects.
- Projects that were submitted during the time the DAC incentive was noted as being not available are eligible for the DAC incentive will have the incentive added by program staff.

Case Escalation Steps

1. Must be logged into Salesforce.
2. Use the Escalate button at the top of the case.
3. Before escalating confirm that you have checked the various resources available.
 - [NYSERDA Knowledgebase](#)
 - [Contractor Support website](#)
 - [Recent Program Announcements](#)
 - Contacted Contractor Support (1-800-284-9069)
4. If your question is still not answered, complete the form, provide details about why escalation is needed and click Submit.
5. Case is automatically assigned to NYSERDA.

- Utilize the case escalation process rather than sending emails to directly to NYSERDA staff. This allows the issue/question to be efficiently routed to the best person to provide an answer.

ation Projects Project Invoices Manage Users Manage Eligible Vehicles **Cases** Project Inspections Knowledge

Case Number 00073094 Created Date 3/17/2022 7:08 AM

Customer in unique circumstances

Customer is in unique circumstances and I need to get an exception to proceed because of X, Y, and Z.

Status Active
Priority High
Case Owner Residential - Triage Queue

Feed Details

Case Detail Escalate

Case Number	00073094	Case Re
Case Owner	Residential - Triage Queue [Change]	Req
Contact Name	Señor Residential Test	Contractor Acc
Account Name	Residential Test Account	Custo
Contact Phone		

▼ Residential Escalation Detail

Residential Escalation

Before escalating a Case to NYSERDA, please make sure you've checked the various resources available to you :

- NYSERDA Knowledgebase: contains helpful step by step instructions and video walk-throughs of certain program elements (i.e., how to submit a Combined Residential Application).
- Contractor Support website: the "go to" resource for contractors to access program related information. Including: Contractor Resource Manual, sign up for Program Announcements, Contractor Webinar and training recordings.
- Recent Program Announcements: announcements are sent out weekly intending to keep the contractor network up-to-date with updates in the program. If you missed the email, that's okay, they all get posted to the Contractor Support website.
- Contractor Support call line: speak to someone on the contractor support team that will help triage the question to the correct team members and expedite getting an answer
- Account Manager: when you need assistance with specific situations in the home, your account manager can help guide you through addressing the needs within program guidelines.

After those steps have been taken, if you still need to escalate the question or concern to NYSERDA please fill out the form below and provide details about why escalation is needed.

Have you searched the [EmPower/AHP Knowledgebase](#)? *

Have you searched [Contractor Support website](#)? *

Have you checked [Recent Program Announcements](#)? *

Have you spoken with [Contractor Support line \(1-800-284-9069\)](#)? *

Have you spoken with your [Account Manager](#)? *

Comments * ⓘ

Yes No

Yes No

Yes No

Yes No

Yes No

Yes No

CANCEL SUBMIT

180-Day Project Completion

Contractors who have more than 20% of their projects older than 180 days since Enrollment Acceptance will be not be assigned any new enrollments.

Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date
Enrollment				
Contractor Assignment	CLEAResult	Closed - Work Completed	8/5/2024	8/5/2024
Enrollment Acceptance	Contractor A	Closed - Rejected	8/5/2024	8/7/2024
Contractor Assignment	CLEAResult	Closed - Work Completed	8/7/2024	8/7/2024
Enrollment Acceptance	Contractor B	Closed - Accepted	8/7/2024	8/7/2024
Workscope Submission	Contractor B	Closed - Work Completed	8/7/2024	9/30/2024

90-Day Appliance Completion

Vendors who have more the 20% of their projects older than 90 days since Appliance Invoice Submission will not be assigned any new appliance requests.

Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date
Enrollment				
Appliance Invoice Submission	ABC Appliances, LLC	Closed - Work Completed	1/15/2025	1/24/2025

Program Actions

Program has been monitoring thresholds and impacted contractors/vendors will be contacted.

When the contractor/vendor backlog has been resolved, they will be made available again and enrollment assignments will resume.

Contractors/vendors can work with the CLEAResult Contractor Support Team for an approved exception if needed for projects with special circumstances.

Automatic Email Notification to Contractors for Appliance Enrollment Revisions

NYHEP will be configured to send an email to the Primary employee listed in the Trade Ally Information section of the Appliance Request Step when an appliance enrollment needs revisions.

The revisions reasons are:

- Missing Photos
- Incomplete Documentation
- Contractor Request
- Inaccurate Sizing


The email will include the revision reason(s), but like EmPower+ enrollments, more thorough and detailed notes will be in the Notes tab of the enrollment.

Trade Ally Information

Trade Allies

	Primary	Trade Ally	Type	Employee	Phone	Email
<input type="checkbox"/>	Yes	Test Contractor	Contractor and Vendor			

Payee



Hello {TradeAllyName},

Following a review, an Appliance Request submission needs your attention.

- **Project ID:** {EnrollmentReferenceNumber}
- **Name:** {AccountHolderName}
- **Location:** {InstallationAddress}

Reviewer's Notes: {Property:Appliance Ordering Issues}

Do not reply to this email. If you have questions, please reach out to support.residential@nyserda.ny.gov or call 1-800-284-9069.

Thank you,

The EmPower+ Team

Duplicate Applications Should be Avoided

Where possible, work with Contractor Support to accommodate changes/updates to existing enrollments

- Try to confirm if your customer has ever applied before with a different contractor
 - Guide them on how to communicate with the prior contractor/contractor support to get the existing enrollment completed if it is not
 - Work with Contractor Support to create additional enrollment(s) if needed
 - these are facilitated internally, no need to submit again
 - Independent submissions in these cases get flagged as duplicates and slows the process
- If a new submission is required: ensure the prior enrollment is marked CLOSED before submitting. Otherwise, the new submission will be cancelled as a duplicate.

Expectations and Tips

help us, help you...

- Between December 1, 2024 and February 1, 2025 approximately 14% of all submitted applications were flagged as duplicates of existing enrollments
- Of these, the majority were contractor-submitted
- Reviewing and conducting outreach on these duplicates slows processing time considerably for all teams involved
- Wait until the prior enrollment is in Funding Allocations CLOSED status before submitting a new application

Pause for Questions

Reminders

Required Contracts

- A contract signed by the customer is required for all projects where measures receive incentives from EmPower+ or Comfort Home, including DI measures.
- Contracts are not required when only an energy assessment is completed.



Clean Energy Hub Coordination

- Coordinating with your Clean Energy Hub where possible, helps make your job easier!
- The Hubs have been tasked with assisting NY residents navigate this space. If you are reached out to by one of the Hubs, please be responsive.
- <https://www.nyserda.ny.gov/All-Programs/Regional-Clean-Energy-Hubs>



**Regional Clean
Energy Hub**
Partnering Organization

BPCA Upcoming Event

We are thrilled to share the overwhelming success of BPCA's first statewide conference, the **BPCA-NY Elevating Building Performance Conference**, taking place Monday evening through Wednesday afternoon, **February 10-12, at the Saratoga Hilton**

Conference Sold Out!!

Due to strong interest, we have officially reached full capacity and are completely **SOLD OUT**. Unfortunately, we are unable to accept any additional registrations at this time. We appreciate your enthusiasm and look forward to expanding our next conference in 2027.

BPCA Upcoming Event

BPCA-NY vs. BPA – Understanding the Difference

We recognize there may be some confusion between BPCA-NY and BPA, as both organizations host February conferences in Saratoga. To clarify:

BPCA-NY is a not-for-profit statewide trade association representing building performance contractors and related professionals across New York State.

We collaborate closely with NYSERDA's Home Performance and Electrification programs, NYS Clean Heat, NY's Energy Hubs, and OTDA to support contractors and industry professionals.

BPA is a national organization that holds their regional conference every other year in Saratoga Springs, BPCA-NY wanted to see a conference each year to fill in those years that BPA is not holding their conference.

BPCA Upcoming Event

BPCA Mentorship Program – Coming Soon!

BPCA is excited to launch a Contractor Mentorship Program in 2024 to support the growth and development of building performance professionals. A survey will be sent in the coming days to gather your input and ensure the program meets the needs of our members. Stay tuned for more details!

Join BPCA – Strengthen Your Business & Network

If you are not yet a BPCA member, we encourage you to join us! Membership provides:

- ✓ A voice in industry advocacy
- ✓ Access to exclusive networking and training opportunities
- ✓ Leads to potential customers
- ✓ Updates on key program and policy changes

Visit bpcanyc.org to learn more and become a member today!

Thank you for your continued support, and we look forward to seeing many of you at the conference!

Final Question Period