

Comfort Home Workflow Platform Update

1. Comfort Home will be migrating from the Compass workflow platform to the New York Home Energy Portal (NYHEP), the same workflow platform used for EmPower+ and the Residential Energy Assessment (REA) program.

2. The transition timeline:

May 1, 2025	NYHEP becomes available for Comfort Home use.
May 1, 2025 to May 30, 2025	Contractors may use Compass or NYHEP to submit Comfort Home assessments and load reduction installations. Projects started in Compass must be completed in Compass. Contractors are <u>strongly encouraged</u> to submit all work started in Compass prior to May 30. A systems maintenance window will make Compass unavailable during the afternoon of May 30 th .
June 2, 2025	Compass will be fully migrated, so NYHEP will be the only Comfort Home workflow system.

3. NYSERDA and CLEAResult will support contractors through this transition in numerous ways:
 - a. Live webinars hosted in late April and throughout May to provide training on NYHEP.
 - Tuesday, April 29th at 10AM – 11AM EST (Register [here](#))
 - Thursday, May 1st at 2PM – 3PM EST (Register [here](#))
 - Tuesday, May 6th at 10AM – 11AM EST (Register [here](#))
 - Thursday, May 8th at 2PM – 3PM EST (Register [here](#))
 - b. Email support at ComfortHome@nyserda.ny.gov.
 - c. Phone support at (888) 406-4009.
4. In most cases, photos will not be required. Photos are required in these circumstances:
 - a. Package B is being used to fund work on the attic gable walls and knee walls.
 - b. A blower door test is not performed due to presence of hazardous materials or an active fireplace/woodstove.
5. There will be some differences between the NYHEP Comfort Home workflow and the Compass workflow:
 - a. Customer release forms will be uploaded into the NYHEP customer enrollment. SharePoint will no longer be used.

- b. NYHEP will use more precise package energy modeling. Assessments entered into NYHEP will require additional inputs, including:
- Total below grade square footage
 - Orientation of front of home (North, South, East, West)
 - Wind exposure
 - Mold or moisture signs inside or outside the home
 - Exterior drainage system condition
 - CAZ Testing: venting, gas leak, spillage, ambient CO, undiluted CO
 - Attic floor area
 - If the attic is within the thermal envelope: gable wall area and insulation level, knee wall area and insulation level, and roof deck area and insulation level
 - Total window square footage for each wall (North, South, East, West)
 - Exterior doors construction type
 - If applicable, skylight(s) square footage
 - If the home has ducts: Level of duct sealing, level of duct insulation, duct location
 - If applicable, presence of whole-house ventilation system
 - Water heater location
 - Percent of total light bulbs by type (Incandescent / CEF / LED)
 - Refrigerator size, age, configuration
 - If applicable, dehumidifier size and ENERGY STAR rating
 - Clothes washer and dryer types
 - Type of stove/range/cooktop and fuel

NYHEP Migration Q & A

1. Will there be a customer application for Comfort Home or will contractors be able to input a customer directly into NYHEP?
 - a. At this time, Comfort Home will not use a customer application. Participating Contractors can create the customer directly in NYHEP, enroll the customer in Comfort Home, then enter the assessment information. Starting a new project is similar to the REA workflow.
2. Will there be a time length for completion of project for Comfort Home in the NYHEP portal like there is for EmPower+? Since there is owner contribution and the customer may want to wait to save funds, do we put the project on hold like EmPower+ or can we leave it open?
 - a. At this time, there aren't any requirements about a project completion timeframe. The assessment may be submitted and paid, then the load reduction project can be added at any time in the future. The Comfort Home 30-day prompt submission policy applies:

the load reduction project must be submitted in NYHEP within 30 days of completion of the work at the customer's house.

3. Will this now use the same customer-facing reports as REA or will it be a new one?
 - a. The Comfort Home Assessment Report is based on the current Residential Energy Assessment (REA) report. There are a few differences, but they are very similar.
4. What happens if you start a project in Compass and it doesn't get installed until June, can you still finish the install upload?
 - a. Compass will no longer be available after May 31, 2025. For this customer, it's recommended that the contractor submit the assessment in Compass (before 5/1/25) or NYHEP (on or after 5/1/25). When the installation is complete in June, submit the installation in NYHEP.
5. Will Comfort Home NYHEP approvals be automated or manual?
 - a. At this time, all Comfort Home NYHEP projects will be manually reviewed. With the volume of Comfort Home projects, we don't expect this to introduce any delays in project submission review, approval, and payment.
6. Are blower door tests going to be required for Comfort Home?
 - a. Pre-work and post-work blower door tests are required today in Comfort Home. See section 4.1.1 of the *Comfort Home Program Pilot Manual*. Blower door tests are not required when hazardous materials are present or suspected but must be documented via photos. The photos must be submitted with the installation submission in NYHEP.
7. If you're already set up with NYHEP, do you have to re-apply for Comfort Home? If you are an REA contractor what is the process for becoming a Comfort Home participating contractor?
 - a. Contractors who aren't currently participating in Comfort Home should complete the application form at <https://www.nyserda.ny.gov/All-Programs/Comfort-Home-Program/Become-a-Participating-Comfort-Home-Contractor>
8. The additional data inputs required for Comfort Home in NYHEP include the CAZ testing. Are there going to be certifications required by the sales staff?
 - a. CAZ testing should be taking place today for every assessment. The Participation Agreement states that all work shall be completed in accordance with all BPI and other industry technical standards. Section 7 of the *BPI-1100 Home Energy Auditing Standard* states that audits shall include spillage testing, CO measurement, and gas leak testing. The only difference in Comfort Home requirements is the addition of on-screen fields requiring entry of the results of the safety testing.
 - b. Currently, Comfort Home has certification requirements as shown below and these will continue to be required:

- Assessments: To participate in Comfort Home, each employee who will be completing assessments must hold one or more of the following certifications:
 - ASHRAE Building Energy Assessment Professional
 - BPI Building Analyst
 - BPI Building Analyst Professional (BA-P)
 - BPI Energy Auditor
 - BPI Multifamily Building Analyst
 - HERS Rater
 - Investor Confidence Project (ICP) Quality Assurance (QA) Assessor
 - LEED Rater
- Load Reduction Contractor: In addition to the certification above at least one staff member must hold ONE of the following certifications:
 - Shell/Envelope
 - BPI Building Analyst Technician (BA-T)
 - BPI Crew Leader
 - BPI Energy Auditor
 - BPI Envelope Professional
 - BPI Quality Control Inspector
 - BPI Retrofit Installer Technician
 - If installing package C: Window/Insulated Panel/ Storm Window Manufacturers' training

9. With both EmPower+ and Comfort Home in NYHEP, will there be any Comfort Home impact from the EmPower+ provisional approval process? How will the 20% 6-month projects be affected with Comfort Home going into NYHEP? Will it be tied together?

- a. No. Comfort Home projects and EmPower+ projects will not impact each other.

Upcoming Program Update webinars and email messages will provide more details throughout the coming months. Please feel free to reach out to the Comfort Home Program Manager, Keith Bohling, at Keith.Bohling@nyserda.ny.gov with any questions.