

# Home Modernization Program Update

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EmPower +  
Residential Energy Assessments (REA)  
Comfort Home

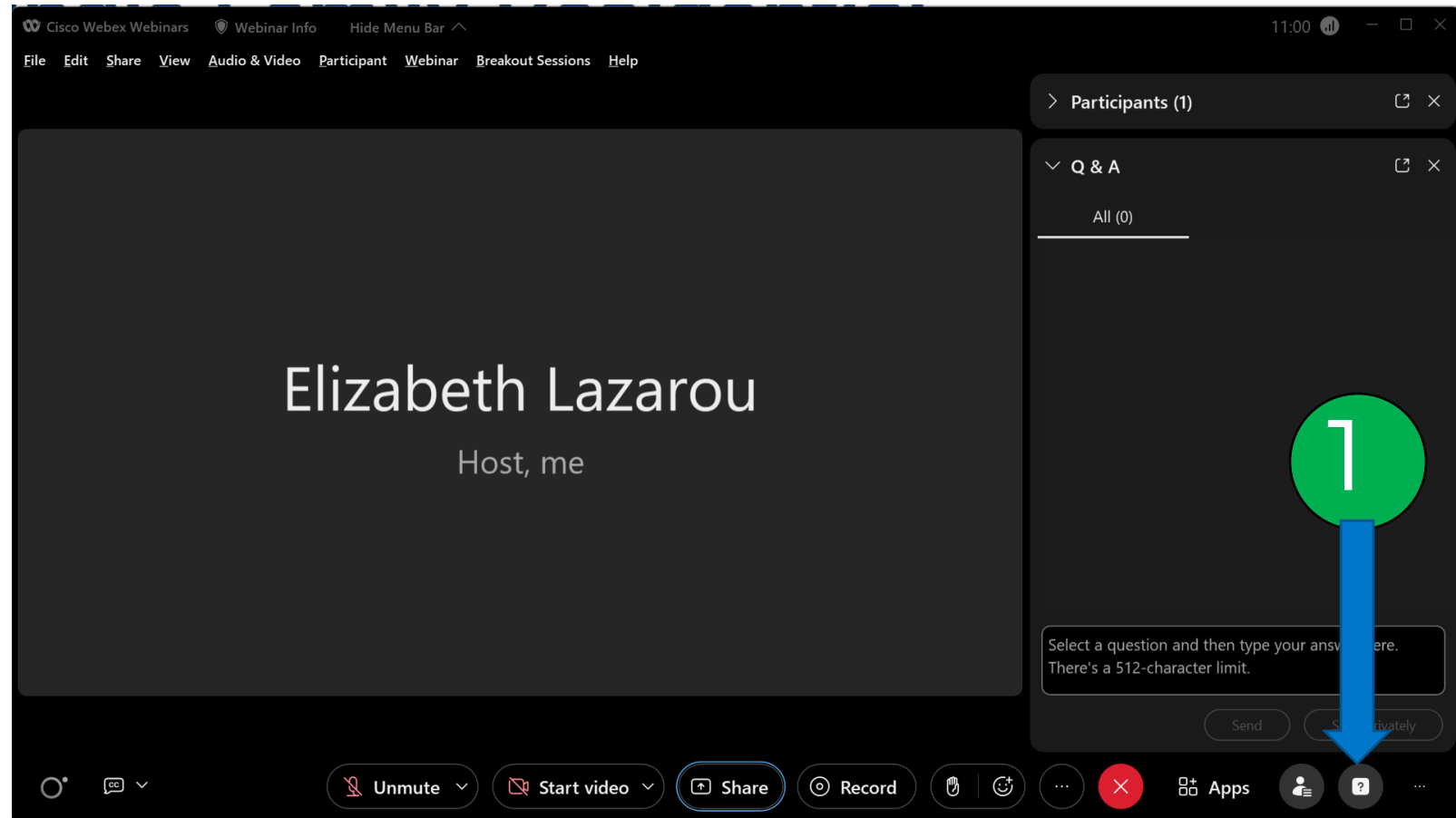
May 2, 2025



# 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."



# 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

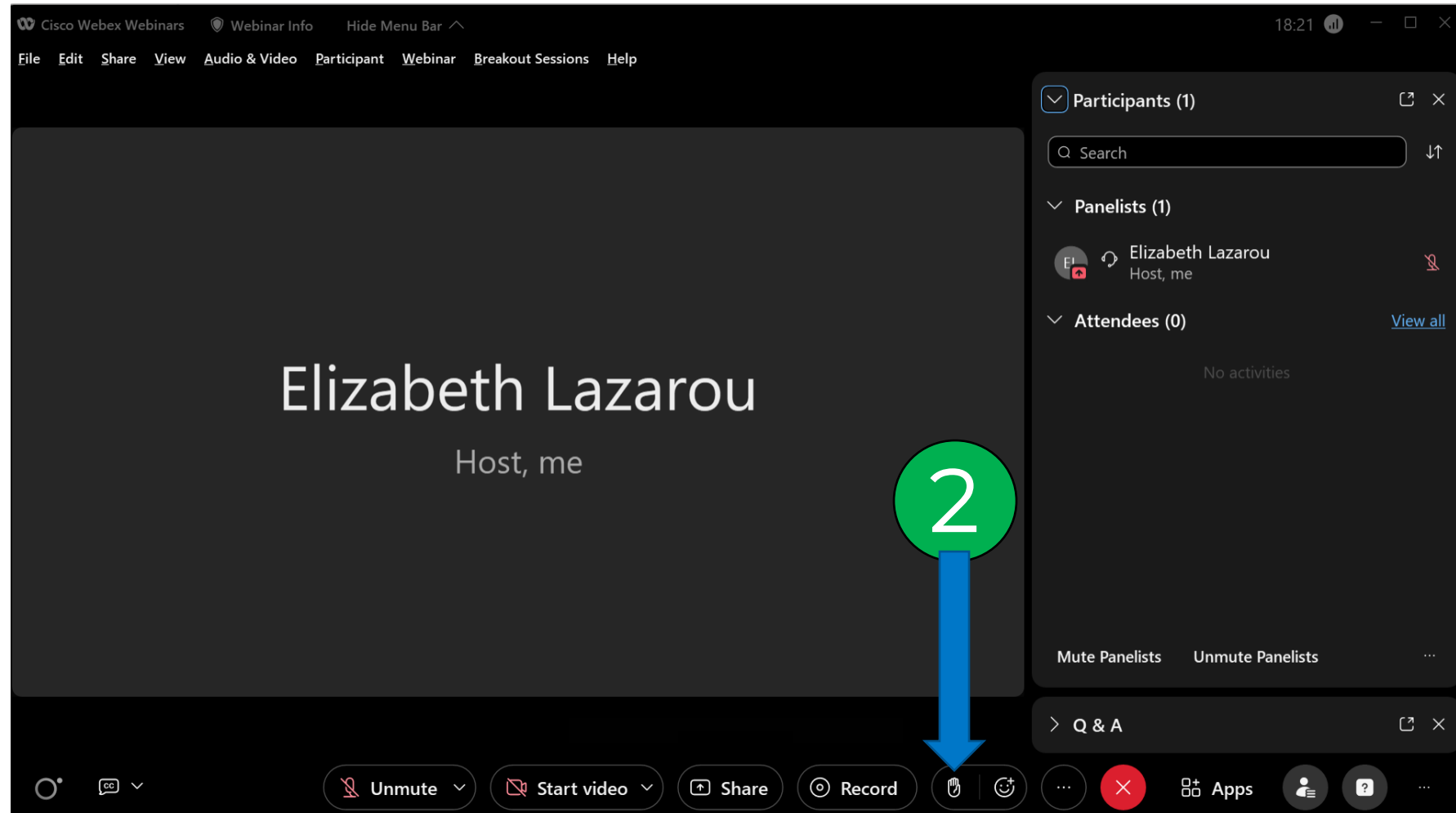


GJGNY:

# Options for Q&A During Today's Webinar - Mic/Phone

## OPTION 2 - MIC/PHONE

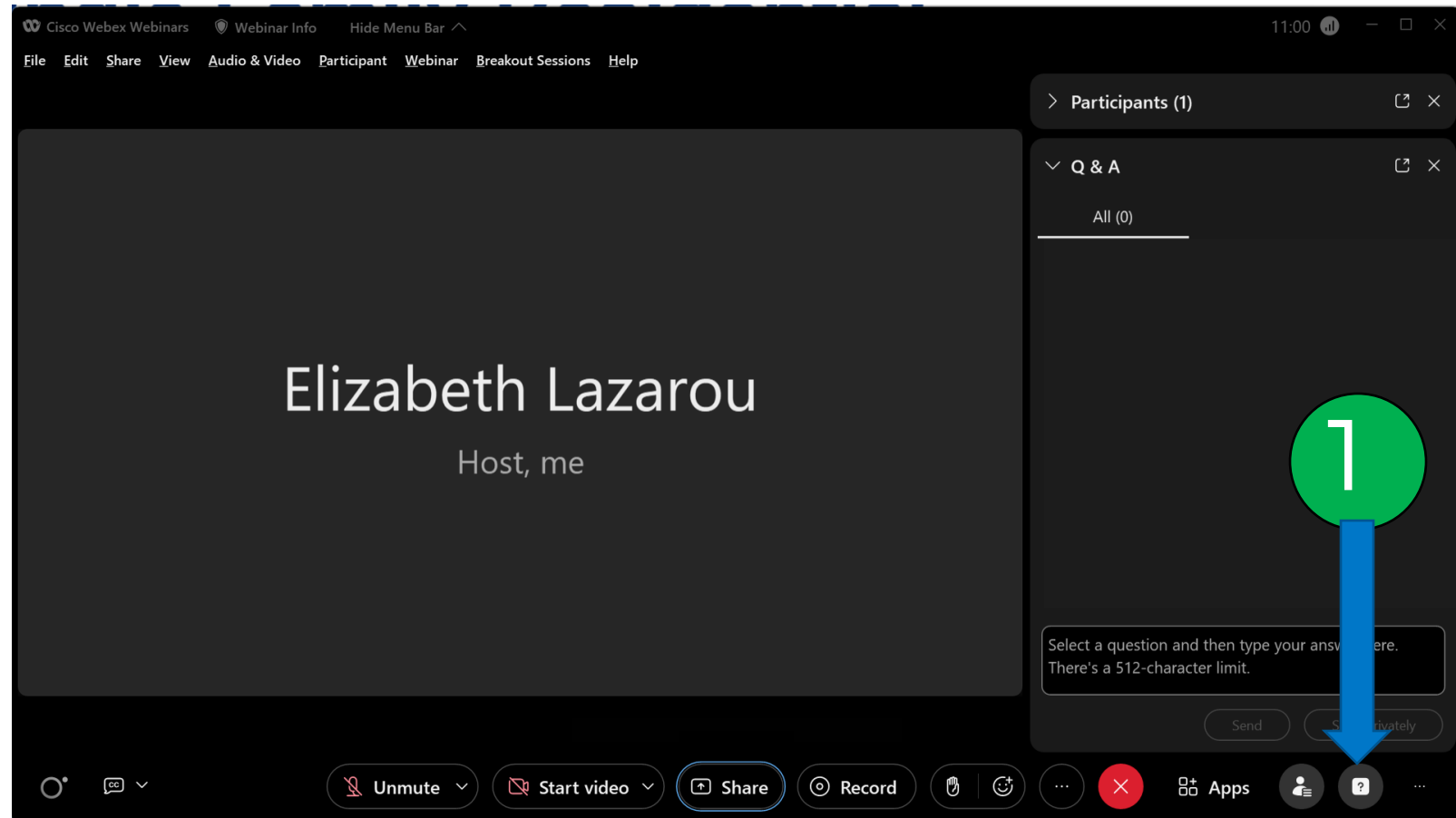
- > Locate the “raise hand” icon in the toolbar at the bottom of your screen.
- > Click on the raise hand icon to let us know you have a question.
- > The Host will indicate when you have been sent a request to unmute, click on the unmute request then ask your question verbally through your computer mic or phone.



# 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:

*Please send your email to only ONE of the email addresses listed below, using both causes duplicative work for the implementation teams.*

### Customer Engagement and Enrollment Contractor

- Implementor: **TRC**
- 1-866-NYSERDA
- 1-877-NYSMART (Customer Support)
- [info.residential@nyserda.ny.gov](mailto: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](mailto: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 and Comfort Home programs.

### TRC



### CLEARresult



# NYSERDA Team Name Change

We are excited to announce that the NYSERDA Single Family Residential team is now called the **Home Modernization** team.

Program documents, including references in manuals, Participation Agreements, Program Announcements, etc. will be updated over the next several weeks. No actions are required from Contractors.

**50 YEARS** 1975-2025

## **Comfort Home**

- Workflow Update
- Incentive Update

## **EmPower+**

- Participation Agreement Claus
- Queue Management Training
- Income Type and Documentation
- Project Completion Timeline
- Provisional Approval

## **Reminders**

- HEAP Update
- Paper Application
- Contractor Certifications
- Hub Coordination
- Code Compliance

# **Today's Agenda:**



**Comfort Home**

# Comfort Home Workflow Platform Update

This information was shared in an email sent from the Comfort Home inbox on March 26.

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

May 1, 2025	NYHEP becomes available for Comfort Home use.
May 1, 2025 to June 1, 2025	<p>Contractors may use Compass or NYHEP to submit Comfort Home assessments and load reduction installations.</p> <ul style="list-style-type: none"><li>• Projects started in Compass must be completed in Compass.</li><li>• Projects started in NYHEP must be completed in NYHEP.</li><li>• We are planning to migrate completed assessments from Compass to NYHEP for potential future project entry.</li></ul>
June 2, 2025	<p>NYHEP will be the only Comfort Home workflow system.</p> <p>Compass will no longer be available.</p>

**NYSERDA and  
CLEAResult will  
support  
contractors  
through this  
transition in  
numerous ways**

- **Live webinars hosted in late April and throughout May to provide training on NYHEP. Watch future program announcements for training dates and times.**
- **Email support at [ComfortHome@nyserda.ny.gov](mailto:ComfortHome@nyserda.ny.gov).**
- **Phone support at (888) 406-4009.**

# Workflow differences

Customer release forms will be uploaded into the NYHEP customer enrollment. SharePoint will no longer be used.

NYHEP will use more precise package energy modeling. Assessments entered into NYHEP will require additional inputs.

# Additional Inputs

This list was shared in an email sent from the Comfort Home inbox on March 26.

- 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 (yes/no)
- Exterior drainage system condition (good/potential issues)
- CAZ Testing: venting, gas leak, spillage, ambient CO, undiluted CO (pass or not)
- Attic floor area
- If the attic is within the thermal envelope:
  - Gable wall area & insulation level
  - Knee wall area & insulation level
  - Roof deck area & insulation level.
- Exterior doors construction type
- If applicable, skylight(s) square footage
- Total window square footage for each wall (North, South, East, West)
- 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

**Pause for Questions**

# Comfort Home Incentive Update

After careful review of program data, customer activity, and forecasts for the remainder of 2025, NYSERDA will be adjusting the Comfort Home incentives effective June 1, 2025.

The new incentives will apply for assessments and installations submitted for approval on or after June 1, 2025.

# Assessments

Assessment incentive increasing to \$300 when blower door test is done as part of the Assessment.

Service or Package	Current Incentive	<b>NEW</b> Incentive (6/1/25)
Assessment	\$ 200	\$ 300 (with blower door test at time of assessment) \$ 200 (without blower door test)

This update applies for assessments submitted for approval on or after June 1, 2025

The 30-day prompt submission policy applies

30-Day Prompt Submission Policy:

- Assessments must be submitted within 30 days of the onsite visit at customer's home
- Load reduction projects must be submitted within 30 days of the installation date.



# Package A

Package A incentive increasing to \$2,500.

This update applies for load reduction projects submitted for approval on or after June 1, 2025

The 30-day prompt submission policy applies

Service or Package	Current Incentive	<b>NEW</b> Incentive (6/1/25)
Assessment	\$ 200	\$ 300 (with blower door test at time of assessment) \$ 200 (without blower door test)
Package A: Attic/Rim Joist	\$ 1,600	\$ 2,500

This is intended to help bring more cost-conscious customers into the program by incentivizing more of the Package A cost.

# Packages B & C

Package B incentive is unchanged.

Package C incentive will be \$2,000.

Service or Package	Current Incentive	NEW Incentive (6/1/25)
Assessment	\$ 200	\$ 300 (with blower door test at time of assessment) \$ 200 (without blower door test)
Package A: Attic/Rim Joist	\$ 1,600	\$ 2,500
Package B: Walls	\$ 3,000	\$ 3,000
Package C: Windows	\$ 4,000	\$ 2,000

A project where the home already meets the performance criteria of Packages A and B will receive \$2,000 for Package C.

A project where the customer is receiving Packages B + C or A + B + C will receive \$3,000.

A 12-month waiting period will apply to a customer who previously received Comfort Home incentives for Package A or B and now wants to add Package C for windows. This project will receive \$2,000 for Package C.

# Westchester and Heat Pump Referral Incentive

The Westchester Incentive is unchanged.

Service or Package	Current Incentive	NEW Incentive (6/1/25)
Assessment	\$ 200	\$ 300 (with blower door test at time of assessment) \$ 200 (without blower door test)
Package A: Attic/Rim Joist	\$ 1,600	\$ 2,500
Package B: Walls	\$ 3,000	\$ 3,000
Package C: Windows	\$ 4,000	\$ 2,000
Comfort Home Westchester Incentive *	\$ 1,000	\$ 1,000
Heat Pump Referral Incentive	\$ 1,000 to \$ 2,000	Not available

\* Only applies for Comfort Home projects in Westchester County that don't qualify for ConEd's Weather Ready Program

After careful review of program activity and current market incentives, and to continue to focus the program's support on load reduction work, NYSERDA will no longer provide a Comfort Home heat pump incentive effective June 1, 2025.

# Incentive Transition

The customer-signed workscope contract must match the incentives.

## Example:

May 2

- Customer signs workscope with \$1,600 Package A incentive

June 12

- Package A upgrade installed

June 20

- Installation submitted in NYHEP

Service or Package	Current Incentive	NEW Incentive (6/1/25)
Assessment	\$ 200	\$ 300 (with blower door test at time of assessment) \$ 200 (without blower door test)
Package A: Attic/Rim Joist	\$ 1,600	\$ 2,500
Package B: Walls	\$ 3,000	\$ 3,000
Package C: Windows	\$ 4,000	\$ 2,000
Comfort Home Westchester Incentive *	\$ 1,000	\$ 1,000
Heat Pump Referral Incentive	\$ 1,000 to \$ 2,000	Not available

\* Only applies for Comfort Home projects in Westchester County that don't qualify for ConEd's Weather Ready Program

This project qualifies for a **higher incentive!**

This installation needs to have a revised workscope contract that shows the higher incentive and must be signed by the homeowner and submitted in NYHEP.

# Incentive Transition

For **Package C** customers:

If you have a signed workscope from prior to May 5, 2025 with the higher incentive amount calculated, upload that with the assessment or installation. NYSERDA will pay the prior incentive amount for package C, even if the project is installed and submitted in June.

This exception expires on June 30, 2025

Service or Package	Current Incentive	<b>NEW</b> Incentive (6/1/25)
Assessment	\$ 200	\$ 300 (with blower door test at time of assessment) \$ 200 (without blower door test)
Package A: Attic/Rim Joist	\$ 1,600	\$ 2,500
Package B: Walls	\$ 3,000	\$ 3,000
Package C: Windows	\$ 4,000	\$ 2,000
Comfort Home Westchester Incentive *	\$ 1,000	\$ 1,000
Heat Pump Referral Incentive	\$ 1,000 to \$ 2,000	Not available

\* Only applies for Comfort Home projects in Westchester County that don't qualify for ConEd's Weather Ready Program

# Updates

- Please update your proposal and contract paperwork.
- If you quote the Comfort Home incentives on your website or in any advertising, please update those.
- NYSERDA is updating the Comfort Home Fact Sheet and will distribute a revised PDF \*.
- NYSERDA is also updating the Comfort Home webpages, Program Manual, and the customer survey.

\* NYSERDA no longer prints copies of Fact Sheets.

## Comfort Home

For Homeowners





**MAKE**  
smart investments  
**IMPROVE**  
home comfort  
**RECEIVE**  
incentives  
up to \$4,000

**Improve your home's comfort and save money with seal and insulate packages**

Do you want your family to be more comfortable in your home, lower your energy bills, and get on the path to a clean energy future? Save money and improve your home's comfort year-round with seal and insulate packages. NYSERDA's Comfort Home program makes it easy to make smart investments for a more efficient home now, while paving the way for the latest clean energy heating and cooling options.

**The importance of load reduction**

When a home's load is reduced, the amount of heat needed to make a home comfortable is reduced, saving energy and money.

NYSERDA's program offers incentives for standardized and pre-screened home improvement packages. These packages range from sealing and insulating an attic and rim joists (good package) to sealing and insulating attics, walls, and windows (best package). By pre-packaging home improvements, NYSERDA makes it easier for homeowners to bundle services and create a clean, comfortable home environment.

**Three tiers of load reduction packages\***

Package	Description	Incentive
★ ★ ★ Good	Seal and insulate attic + seal and insulate rim joists	\$1,000
★ ★ ★ Better	Seal and insulate attic + seal and insulate rim joists + insulate walls + insulate floors	\$2,500**
★ ★ ★ Best	Seal and insulate attic + seal and insulate rim joists + insulate walls + insulate floors + install ENERGY STAR® windows	\$4,000**

\*Dollar amounts shown reflect incentive amounts, total package costs to be discussed with contractor  
\*\*Additional incentives available for homeowners located in Westchester County

visit:  
[nysenda.ny.gov/comforthome](https://nysenda.ny.gov/comforthome)  
call:  
1-888-406-4009



**NYSERDA**

# Pause for Comfort Home Q & A

**Keith Bohling**  
**[keith.bohling@nyserda.ny.gov](mailto:keith.bohling@nyserda.ny.gov)**

**Comfort Home Operations**  
**1-888-406-4009**  
**[comforthome@nyserda.ny.gov](mailto:comforthome@nyserda.ny.gov)**

**EmPower+**



# Professional Conduct and Courtesy

- As a participating contractor in NYSERDA's Residential Energy Assessment Programs, Contractors agree to the terms and conditions included in the Participation Agreement (found in Section 2.3 of the Program Manual).
- **Section 6.2 – Professional Conduct and Courtesy**
  - *The Participating Contractor shall treat all Customers fairly, provide accurate information on all available Program Financing and Incentives and deliver promised services in a timely, competent, professional, and reasonable manner. **Participating Contractors shall conduct themselves in a professional, respectful, and reasonable manner at all times when interacting with Customers, NYSERDA staff, and Implementation Contractors.** Participating Contractors shall not engage in behavior that adversely impacts NYSERDA, Implementation Contractors, or other Participating Contractors, tarnishes NYSERDA's service marks, and/or diminishes the profession or service in the eyes of the public.*
- Disciplinary action will be taken when the terms of the Participation Agreement are not adhered to, including incidents where Contractors are not conducting themselves in a professional, respectful, and reasonable manner when interacting with Customers, NYSERDA staff, and Implementation Contractors.

# Queue Management Webinars

## NYHEP General Queue Management Webinars

These trainings will go over searching for projects, placing enrollments on hold, and techniques for general queue management.

All attendees must register prior to joining the event.

Recordings of the training will be available on the Contractor Support website after the training.

Date	Training	Time	Register Here:
5/16	NYHEP General Queue Management	9:00 AM-9:30 AM	<a href="#">Link</a>
5/30	NYHEP General Queue Management	9:00 AM-9:30 AM	<a href="#">Link</a>

# Income Documentation Access

As part of NYSERDA's continued efforts to be good stewards of Personal, Private or Sensitive Information (PPSI), NYSERDA will further restrict access of **Income, Categorical and Other Documents uploads** used to determine eligibility and submitted as part of the EmPower+ Application process. Beginning the week of April 21, access to these documents will vary based on the individual that submitted the application, and their role required to view the information. Generally:

- Participating Contractors, Clean Energy Hubs, and other partners who submit application documents on behalf of a customer will have access to documentation uploaded to the Income, Categorical, and Other Documents sections up through the review and approval process. Once the application review is complete, access to these documents will be restricted.
- Access to documentation uploaded to the Income, Categorical, and Other Documents sections for applications submitted directly by individual customers will be restricted to only NYSERDA and program implementation staff.

# Income Documentation: SSI vs SSA

- SSI is a categorical income verification document, Supplemental Security Income

This is **DIFFERENT** from other Social Security Income

- SSA encompasses Social Security income benefits from retirement, disability, or survivor benefits
  - This is standard income, and ALL household income must be reported and supporting documents provided, not just social security income

# Example of SSI vs SSA letter

- SSI

Social Security Administration  
**Supplemental Security Income**  
Important Information

SOCIAL SECURITY  
7TH FLOOR  
195 MONTAGUE ST  
BROOKLYN NY 11201  
Date: July 20, 2023  
BNC#: [REDACTED]

0012898 00013194 1 AB 0.537 SN6LNA T49 P3  
SSI MA 07/13/2023 [REDACTED]

Your current monthly Supplemental Security Income (SSI) payment is \$914.00 for August 2023. You will continue to get this amount each month unless there is a change in the information we use to figure your payment.

**When You Will Receive Your Payments**

Your representative payee will receive your monthly payment of \$914.00 around August 1, 2023, and on the first of each month after that.

**Information About Your SSI Payments**

- SSA

SOCIAL SECURITY ADMINISTRATION  
**Social Security Administration**  
**Benefit Verification Letter**

Date: March 26, 2024  
BNC#: 24V4155J10315  
REF: A, DI

Buffalo NY 14211-2324

You asked us for information from your record. The information that you requested is shown below. If you want anyone else to have this information, you may send them this letter.

**Information About Current Social Security Benefits**

**Type of Social Security Benefit Information**

You are entitled to monthly disability benefits.

# Income Type Updates

NYSERDA has worked to align income sources across programs and highlighting the changes below and effective as of 4/14/25

- **Foster Care payments** are not considered as income for eligibility determination.
- **Estates or Trusts** added as a regular source of income.
- **Gambling or Lottery Winnings (Net)** added as a regular source of income.
- **Insurance Proceeds or Dividends** added as a regular source of income.
- **Royalties** added as a regular source of income.

Current Value	New value
Annuities	Annuities
Business or Farm Income	Business or Farm Income
Child Support / Alimony	Alimony
Disability(Short Term or Long Term)	Disability (Short Term or Long Term)
Foster Care Payment	Deprecated
Interest Income	Interest Income
Pension	Pension or Retirement Account
Rental Income	Rental Income
Salaries / Wages	Salaries/Wages
Self Employed	Self-Employment Income
Social Security	Social Security
Social Security Disability (SSD)	Social Security Disability (SSD)
Tax Documentation	Tax Documentation
Unemployment	Unemployment
Veterans Benefits	Veteran's Benefits
Worker's Compensation	Worker's Compensation
	Estates or Trusts, as a regular source of income
	Gambling or Lottery Winnings (Net)
	Insurance Proceeds or Dividends, as a regular source of income
	Royalties

Yellow = Changed  
Red = removed  
Green = new

# Project Completion Timeline to 90 Days

- With the implementation of the Provisional Approval work step, NYSERDA is revising the timeline for the expected completion of EmPower+ projects. Currently, contractors are expected to complete a project within 120 days from the workscope submission step.
- Effective immediately, contractors are expected to **complete projects within 90 days** following notification of the final work scope submission stage in NYHEP. Section 5.21 of the [Program Manual](#) has been updated to reflect this change.

# Contractor DAC Incentive

- Effective April 21, projects at the Workscope Submission stage in NYHEP, the Contractor DAC Incentive will only be available for projects **with IRA eligible measures**.



# Provisional Approval

Projects will be selected for approval based on two major factors.

## 1. Priority Projects

The first group of projects to get approved will be priority projects that align with our statewide policy objectives to prioritize affordability for energy burdened households. These projects will include:

- A. Referrals from Utilities, OTDA, social service agencies, WAP
- B. Pilot projects such as Healthy Homes, KEDNY Health and Safety, Energy Affordability Guarantee

## 2. First-come, First Served

The remaining projects will be sorted chronologically based on the enrollment date of the project with the projects with the oldest **enrollments** being approved first. This will ensure that customers who applied to the program first get priority with completing their projects.

Special requests to move a project forward cannot be accommodated. Please leave the support line open for other priority calls.

**Reminder:** Enrollment dates for first-come, first served are based on the project creation in NYHEP (application approval). **Start Date on the first Contractor Assignment step.** NOT workscope submission or other date.

Timing of a provisional approval can vary depending on the number of priority and aged projects submitted each week.

**Pause for Questions**

# Reminders

# Home Energy Assistance Program (HEAP)

- The 2024-2025 Home Energy Assistance Program (HEAP) Heating Equipment Repair and Replacement (HERR) and Clean and Tune (C&T) benefit components will operate through the close of business (COB), **May 9, 2025**.
- Questions regarding the HEAP program should be directed to your HEAP Local District Contact or the OTDA Hotline at 1-800-342-3009.

# Paper Application

- If you are providing paper applications to customers there are a few things to keep in mind.
  1. Make sure the application is the most recent version and not an outdated application missing crucial components i.e. the updated attestation.
  2. If you are encouraging customers to send completed EmPower+ applications through the mail, please be sure they are sending to the correct address:

TRC Companies 3 Corporate Drive, Suite 202 Clifton Park, NY 12065

# Contractor Certifications & Specialties

## Contractor Specialties are now live on the EmPower+ website:

- Specialties are directly connected to the certifications held, and the supporting documentation required has been submitted.
- Please review your company listing by May 18.
- If you feel there are any discrepancies, please reach out to [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov)

## Find a Participating EmPower+ Contractor

Find a Participating EmPower+ Contractor

When applying to [EmPower+](#), you will have an opportunity to choose a participating contractor from the list below or we can help assign one to you.

**EmPower+ Contractors**Search Company:

Enter Your Zip Code:

Supported Languages:

Select a Specialty

Show  contractors per page of **223** result(s) Clear Filters

Company	Status	Specialties
<b>Supportive Services Corporation</b> 245 Elmwood Ave, Buffalo, NY 14222 <b>(716) 881-6350</b> Supported Languages: English <a href="#">Contact Contractor</a>		Residential Inspector, Energy Assessments, Air Sealing & Insulation, Manufactured Housing
<b>Breathe Easy of CNY Inc.</b> 1636 State Route 49, Constantia, NY 13044 <b>(315) 623-2035</b> Supported Languages: English <a href="#">Contact Contractor</a>		ASHP Installer, Energy Assessments, Heat Pump Water Heaters
<b>Fulmont Community Action Agency, Inc.</b> 20 Park Street, Fonda, NY 12068 <b>(518) 853-5016</b> Supported Languages: English <a href="#">Contact Contractor</a>	NYSERDA Quality Home Contractor	Energy advisor services, Residential Inspector, Energy Assessments, Air Sealing & Insulation

<https://www.nyserda.ny.gov/Contractors/Find-a-Contractor/EmPower-Plus-Contractors>

# Code Compliance

- Sections from the Participation Agreement
  - 3.3 Licensing - It is the sole responsibility of the Participating Contractor and its Subcontractors to obtain and maintain any required federal, state, county, or municipal government **licenses** required for installing measures and to not perform work for which they are not licensed, if licensing is required.
  - 3.4 Permits - It is the sole responsibility of the Participating Contractor and its Subcontractors to obtain and comply with the terms of any required **permits** for installing measures or conducting Energy Assessments prior to the start of work.
- Anyone found not following these requirements will face disciplinary actions including probation, suspension or termination from the program.

# 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



**Final Question Period**