Home Modernization 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

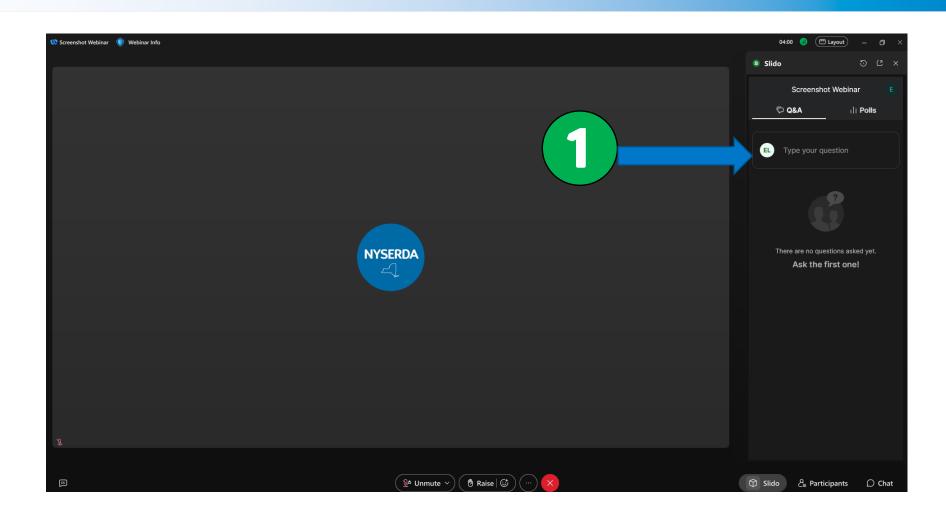
September 5, 2025



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

OPTION 1 - TEXT

- > Locate **Sslido** panel on in the right portion of your webinar panel.
- > Type your question as prompted into the text field and click "send."



Topic Specific Questions are Encouraged

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

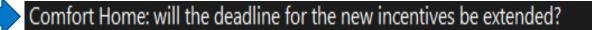
Please note that specific inquiries and topics not covered during today's agenda, i.e., enrollment number or client name can be addressed through the standard customer or contractor support options.

Format of Q&A During Today's Webinar

Topic: [Type your question]

- Please list your topic first followed by a colon sign.
- > Type your question pertaining to the topic after the colon sign.
- This will allow the Host to align the questions with the topic being presented.

Questions not answered during the call should be sent to contractor support.



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

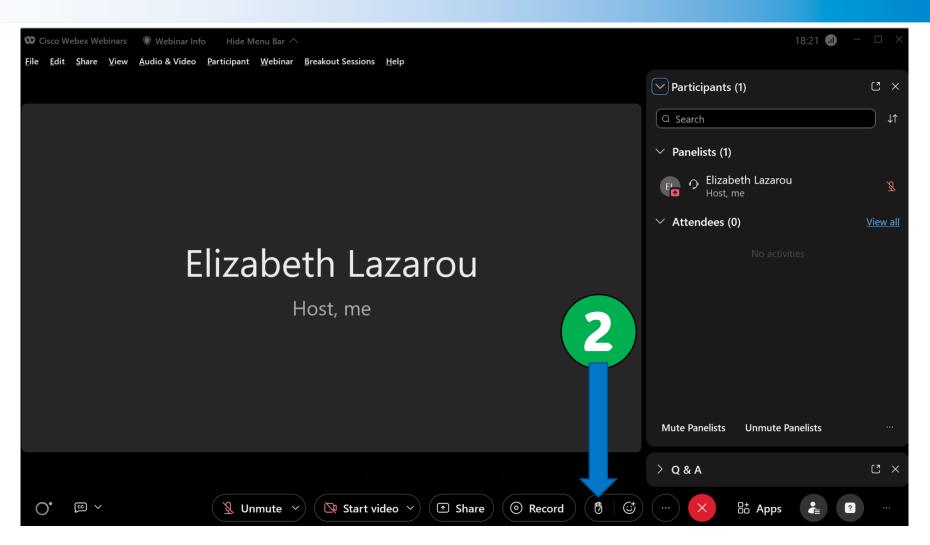
GJGNY:

Topic

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 the host know you have a question.
- The Host will indicate when you have been sent a request to unmute. Click on the unmute request to ask your question verbally.



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
- 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: CLEAResult
- 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 and Comfort Home programs.

TRC CLEAResult

Customer Application Processing

Income Verification for Program Incentives Post-Application
Approval
Customer
Support

Application

Approval

EmPower+, REA & Comfort Home NYHEP Workflow

Programmatic & Technical Support

Invoice Processing



Residential Energy Assessments

Virtual Energy Assessment Program

EmPower+

- No Heat Guidelines
- NYHEP Permit & Licensing Process
- Accessing Campaign Codes

Reminders

- Vacant Unit Clarification
- Site Visits by Technical Services
- TRC/CR Ideal Call Times
- Required Spray Foam Training
- Find a Contractor Site Review
- Clean Energy Hub Coordination

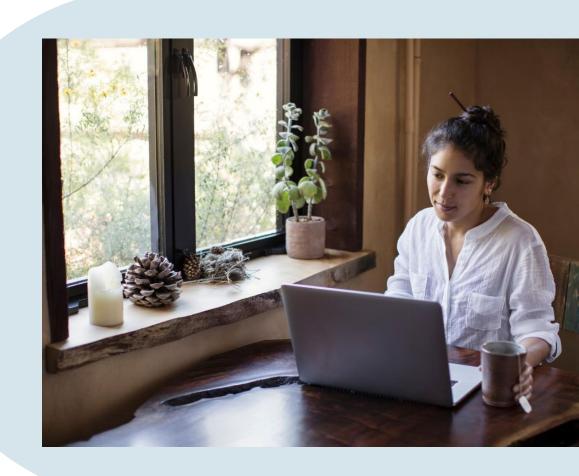
Today's Agenda:



Virtual Energy Assessment Program



MyEnergy Assessment



Steve Wagner

Sept 2025

Virtual Energy Assessment Program

- 1. Collect and analyze public data sets to develop a basic building model, deliver an assessment report, and develop preliminary energy efficiency and electrification recommendations.
- 2. Increase residential energy efficiency market engagement and lead to sales of energy efficiency and clean energy home improvements.
- 3. Support contractors and homeowners in identifying efficiency opportunities using methods that reduce time, effort, and in-person contact.
- 4. Connect residents to the MyEnergy Platform to help customize a clean energy roadmap.

Virtual Energy Assessment Program Timeline

- Pilot launch planned for Sept 30, 2025
- Orange, Putnam, Ulster Counties
- Hubs, Utilities, and other stakeholders are being made aware
- Working within an existing NYSERDA marketing plan to promote
- Pilot will include a brief survey to gather feedback which will be incorporated for a full NYS launch planned for Jan 1, 2026
- NYSERDA Press Release and Marketing will follow

Customer Advantages

- Used as a market engagement tool to educate residents
- Provide a path to relevant programs
 - Remove tire kickers from time-consuming in-home experience
- Participate at your own pace. More efficient use of time.
- Fill an education gap by providing concise standardized information.
- Provide a more cyclical program experience.

Identical customer experience. A positive one!

Contractor Advantages

- VEA is not meant to be a replacement for onsite energy assessments.
 - Ability for contractors to review housing data before visiting the home.
 - Residents can communicate comfort and performance issues to assist contractor in providing an appropriate visit.
 - Ability for residents to invite contractors to view their home
- Can be used to assist residents who live in underserved areas
- Encourage residents to engage with contractors and schedule an inhome audit.
- Residents will be directed to MyEnergy to learn more about NYSERDA's programs and participating contractors

VEA Experience

- Assessments are created through public data and available to all NYS SFR.
- Residents can update incorrect or out-of-date home data.
- Residents can choose a limited number of basic home energy efficiency upgrades including but not limited to air sealing, insulation, and HVAC upgrades to see potential energy savings scenarios based on selections.
- Provide measure recommendations with a focus on beneficial electrification.
- Call to action will connect residents to MyEnergy

Future enhancements

- API connection to MyEnergy
- Provide a more comprehensive customer profile
- Contractors can better educate themselves about the home before conducting an in-home energy assessment
- Beneficial Electrification Tracking
- Incorporate simple Health & Safety education
- Exploring the pro/con of displaying potential dollar savings
- Adhering to GJGNY audit requirements

> Skip to End

Other

Home Energy Report / Home Questionnaire **Basic Info** Space Heating Space Cooling Water Heating What type of house do you have? Single Row house · **Duplex** Row house · Detached Detached Middle unit End unit Mobile Home What year was your house built? Enter year 1950 If you are unsure, you can select from the following estimated year ranges below 2001 to 2010 1981 to 2000 1961 to 1980 1941 to 1960 1940 or before 2011 to present

Doors How many floors above ground level does your home have? Do not count basement/ crawlspace. For split-level homes, include the lower level. 2.5 3.5 Is your basement finished? Yes No **Areas** What is the total floor area of your home? Only include areas you heat. Area (ft²) 2500 If you are unsure, you can select from the following estimated area ranges below 4000-5000 ft² 3000-4000 ft² 2000-3000 ft² 1500-2000 ft² 1000-1500 ft² less than 1000 ft²

Insulation

Windows &

Home Energy Report / Home Questionnaire > Skip to End Basic Info Space Heating Space Cooling Water Heating Windows & Insulation Other Doors Do you have a cooling system/ air conditioning? Yes No What type of cooling / air conditioner do you have? If you don't see your system type, choose the most similar Central single package system Central Split System (Ducted) Conventional A/C Mini-split Heat Pump (ductless) Window A/C Not Installed Do you know when your cooling system was last upgraded? Enter year 2005 If you are unsure, you can select from the following estimated year ranges below

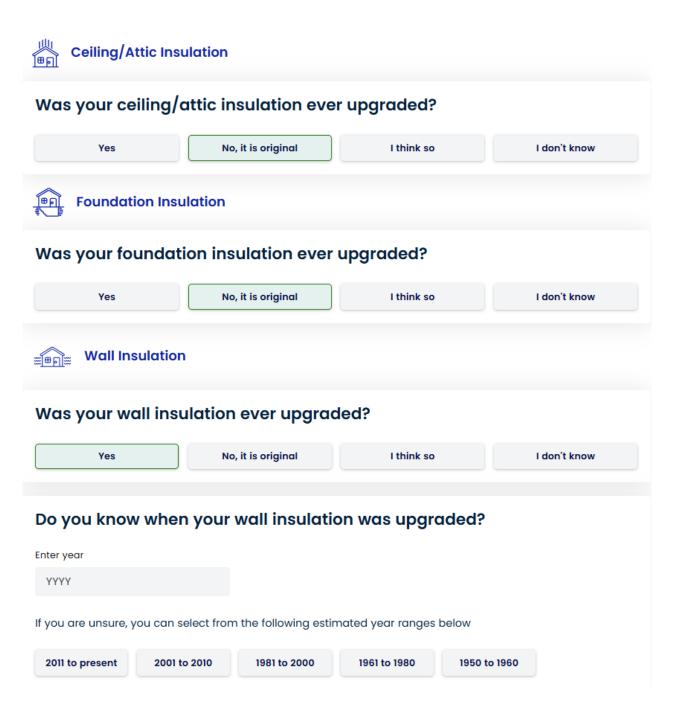
1981 to 2000

1961 to 1980

1950 to 1960

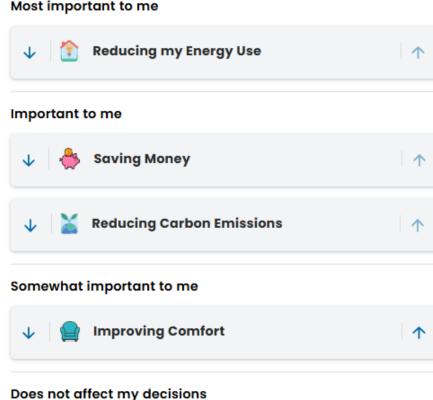
2001 to 2010

2011 to present

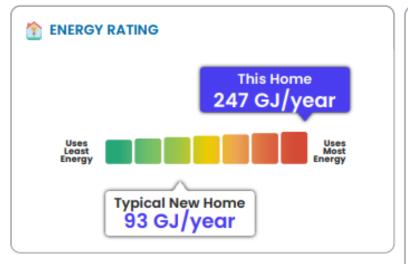


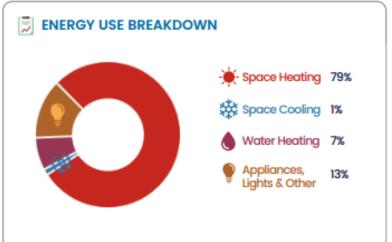
When making decisions about energy efficiency upgrades, what is most important to you?

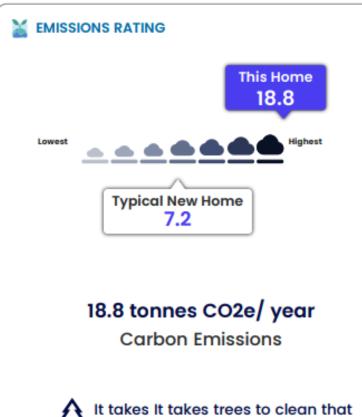
Most important to me



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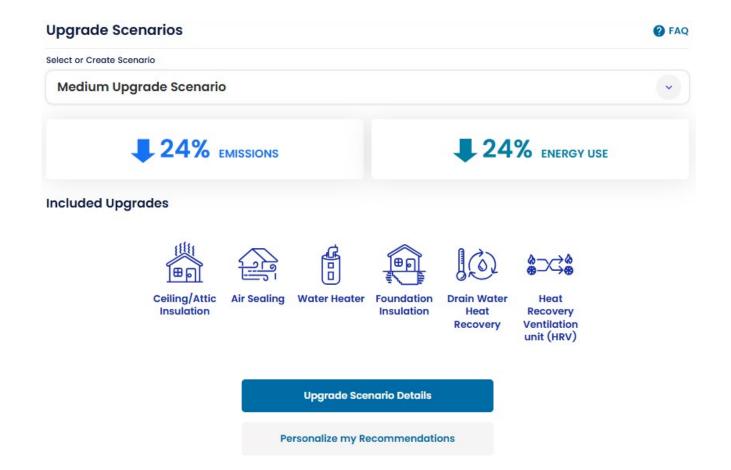




much carbon from the air trees to

clean that much carbon from the

air



Pre Existing Upgrade Packages Create Your Own

Attic, Wall, Foundation Insulation Air Sealing Heat Pump Water Heater Other Measures are still TBD The different levels of energy assessments are described below.

PRELIMINARY ★☆☆

A great starting point for every home in the State. This Home Energy Report level represents a typical home like yours (using averages and assumptions based on common scenarios), before any upgrades are made.

QUESTIONNAIRE-BASED * *

This assessment level provides you with a tailored Home Energy Report based on the information you know about your home. For example, letting us know things like you use propane as your heating fuel, you've added extra insulation, or installed a new front door can make big changes to your Home Energy Report.

PROFESSIONAL ★★★

This is the top-tier assessment level. Get a custom detailed Home Energy Report with a no-cost in-home energy assessment.

A NYSERDA participating contractor will find all the places your home could be wasting energy and help you make a personalized plan to prioritize any energy upgrade projects. They'll also outline any energy bill changes and incentives, rebates, or tax credits available to help you pay for the upgrades.

GET MY IN-HOME ASSESSMENT

Pause for Questions

EmPower+

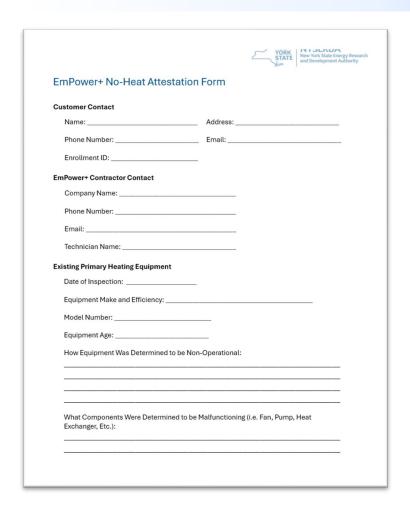
No-Heat Guidelines

- NYSERDA has updated the No-Heat Guidelines, found in Section 5.9 of the <u>Program Manual</u>, to provide guidance on the submission of No-Heat projects through EmPower+. These guidelines are effective beginning October 1, 2025, and continue through the heating season until April 30, 2026, or until funds are exhausted, whichever comes first.
- Summary of Changes for 2025-2026
 - 1. The total available No-Heat funding for the 2025-26 heating season is \$1,000,000. EmPower+ will provide a page on the contractor support site that will post ongoing updates of the available funding.
 - 2.The maximum No-Heat incentive is \$6,000, regardless of heating system type.
 - If the project cost exceeds the available funding, households are encouraged to access low-interest financing through Green Jobs Green New York or work with their Clean Energy HUB to see if other funding opportunities are available in their area.

No-Heat Guidelines

- 3. No heat incentives are reserved and made available to low-income households.
- 4. Incentives are not available for rental units unless the building is owner-occupied and the building owner is income eligible.
- 5. Contractors and customers must complete the No-Heat Attestation Form and submit as part of the project submission paperwork.
- Sections 3.1, 5.9, 5.15, and 5.19 of the <u>Program Manual</u> will be updated to reflect these changes
- As a reminder, EmPower+ may only be used as a last resort option for no-heat emergencies where the homeowner has already exhausted all other public assistance options to obtain a functioning heating system.
- If there are any questions, please contact Contractor Support at support.residential@nyserda.ny.gov.

No-Heat Attestation Form





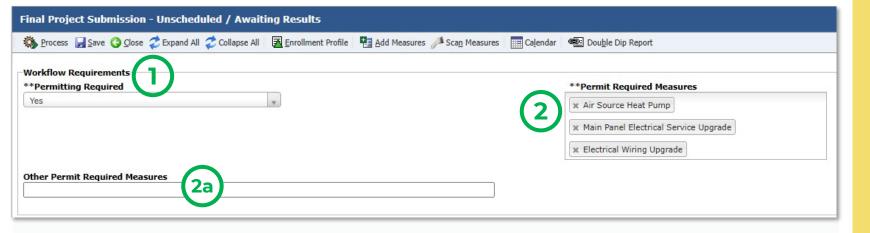
This will be made available on the Contractor Support Site in Section 8 of the Program Manual

Pause for Questions

Final Project Submission Workflow Step - Documents

Permits Required to be Uploaded to NYHEP

Effective October 1, 2025, contractors will need to provide proof that they obtained the required permits for their project at Final Project Submission.



□ New Coclose										
	Required?	Document Type(s)	Document Name	Source	File Size	Comments	Create Date	Created By		
		G								
*	!	Permit								

A new section on the workflow step, *Workflow Requirements*, will require contractors to answer the following:

- 1. Permitting Required = (Yes, No)
- If Yes,
- 2. Permit Required Measures =
 (Multi-select of Heat Pump Water
 Heater, Air Source Heat Pump, Panel Box
 Upgrade, Wiring Upgrade, Insulation,
 Furnace, Boiler, Others)
- If Others,
- 2a. Other Permit Required Measures = (Text box to indicate the other permit required measures)
- 3. Required document upload of permit associated to the measure(s) indicated

Codes, Regulations, and Standards

All Participating Contractors and any Subcontractor retained by a Participating Contractor must perform work in compliance with all applicable codes, regulations, laws, and standards in the jurisdiction where completing work. In instances where Program guidance may conflict with state and/or local code, code must take precedent. This includes obtain permits when required and obtain the required licenses to work in each jurisdiction.

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. The Participating Contractor shall produce evidence of current licensing upon request by NYSERDA or its Implementation Contractors. Failure to comply with licensing requirements may result in disciplinary action.

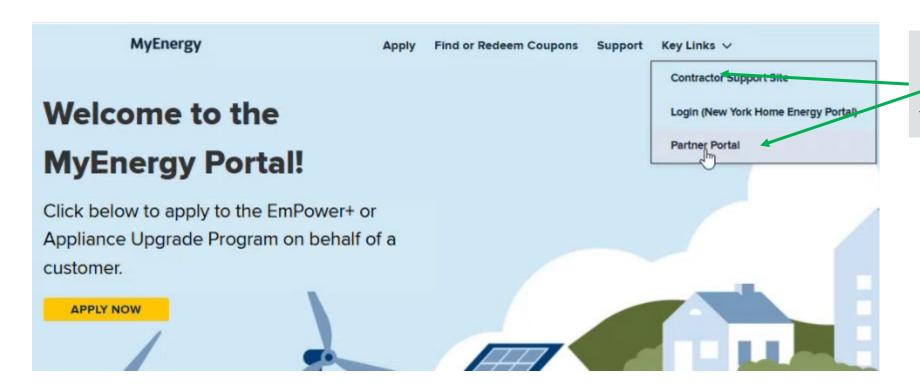
3.4 Permits

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. The Participating Contractor shall produce evidence of applicable permits upon request by NYSERDA or an Implementation Contractor. Failure to comply with permitting requirements may result in disciplinary action or termination from the Program(s).

Any contractors found not following these requirements will face disciplinary actions including probation, suspension or termination from the program.

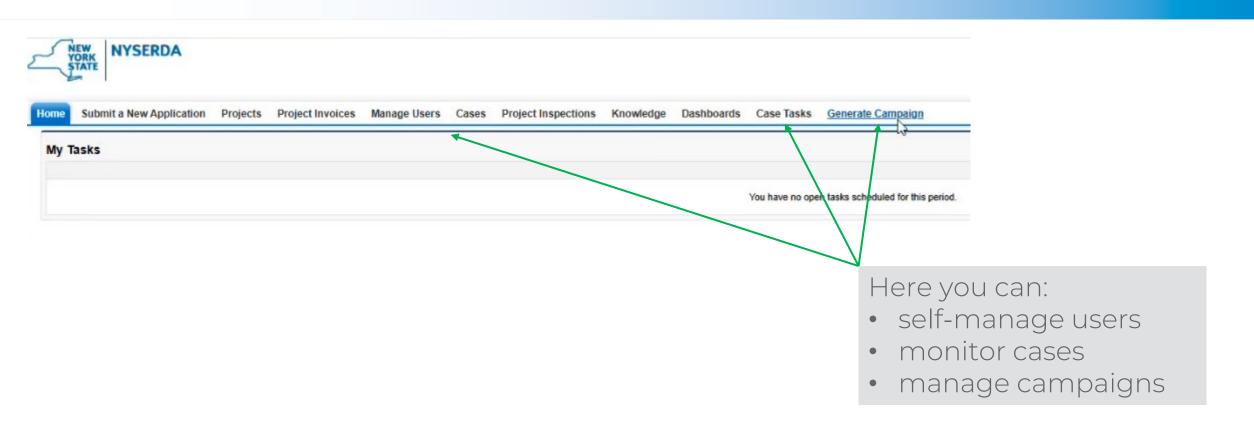
Pause for Questions

Campaign Codes: How to Access

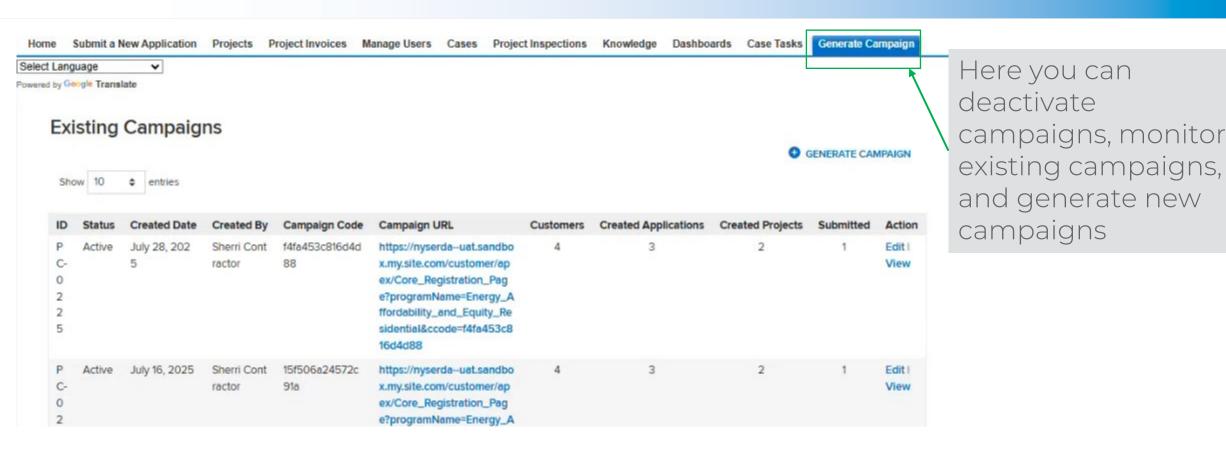


In the MyEnergy Portal: Navigate to "Key Links" then "Partner Portal"

Campaign Codes: How to Access



Campaign Codes: How to Manage

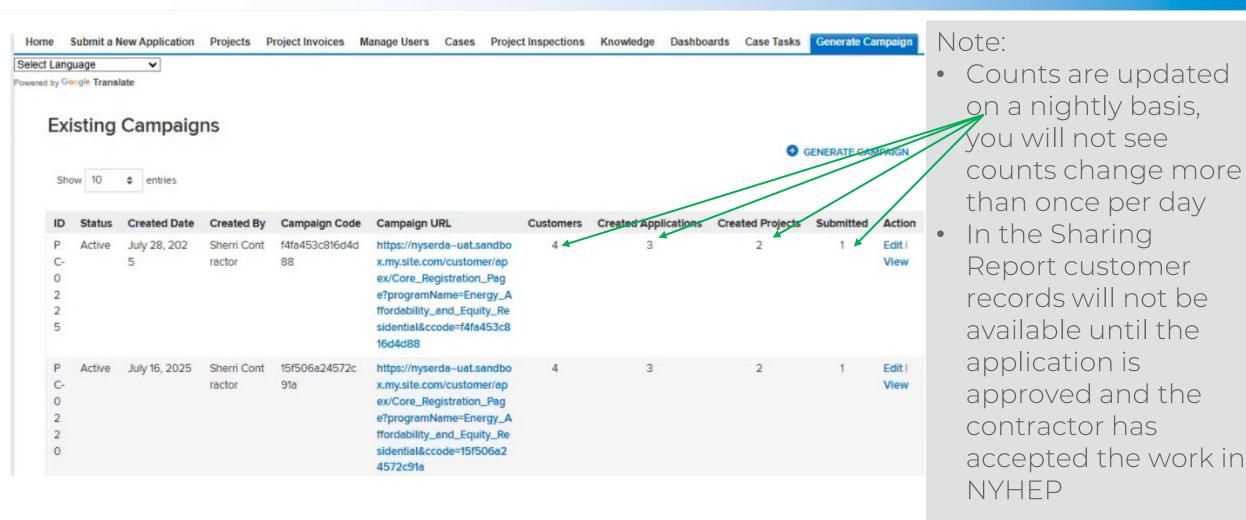


Campaign Codes: How to Manage



NOTE: The unique campaign code will always be at the end of the URL

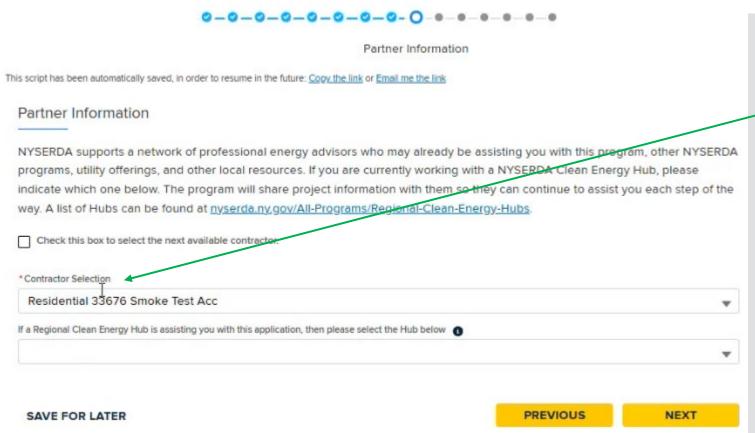
Campaign Codes: How to Manage



Campaign Codes: How to Use

MyEnergy	Learn About Home Energy Upgrades V Support	Login/Re Each	Each unique campaign		
	Register for MyEnergy	the M	vill bring the user to yEnergy		
	Light Control of the	regist	ration page.		
Please enter you	r contact information *Last Name	to the	The code will only apply to the FIRST time the		
*Email ExampleUsername@youremail.	*Phone		customer starts their		
*Username ExampleUsername@youremail.			cation from the aign code link.		
		accou they n	y create a new nt, once registered nust use your aign link again to link		

Campaign Codes: How to Use



If the campaign link has been used correctly, then the contractor associated with that campaign will auto-populate in the Partner Information section

The customer still has the option to pick a different contractor, but the system guides them towards the contractor associated with the campaign

Pause for Questions

Reminders

Vacant Unit Clarified Guidelines

- If there is one vacant unit in the building, the building owner's income will be used to qualify the vacant unit
- If 50% or more of the units are vacant, only the units that are income qualified can be served
- IRA funding may only be applied to occupied and income eligible units.
- This clarification is effective immediately
- Section 5.19 in the <u>Program Manual</u> has been updated

Site Visits by Technical Services Program Implementer

CLEAResult conducts on-site inspections to assist Participating Contractors and Customers for a variety of reasons including:

- Home Energy Assessments*
- Workscope Development Options*
- Quality Control (QC) of In-Progress Projects*

- Customer Concern Resolution
- Quality Assurance (QA)
 Resolution
- Internal Quality Management (IQM) Plans

Please work with CLEAResult when they reach out to schedule a site visit. Contractors can also request on-site or remote inspections through Contractor Support.

Remote Inspections Available

Live-service video solution to perform remote inspections.

- Call into Contractor Support
- Link is sent directly via SMS text to a phone number
- Join the live call without the need to register an account or download an app
- Embedded features such as guides, mark up tools, file sharing and chat enhance the interaction

^{*}Required for New Contractors with Provisional Status

Call Volume to Contractor Support

Callers: Customers, Contractors, Program Partners

Implementer: CLEAResult

What are the busiest times?

11:30AM - 1:00PM

Avoid calling during this time unless necessary as longer wait times could occur.

What can you do if you are experiencing a longer wait time?

Contractors and Customers can opt to utilize the **Call Back feature** when experiencing longer wait times. The Call Back feature will automatically queue the caller to receive a callback by the next available representative.

If presented with the option to leave a **voicemail**, voicemails are listened to and responded to daily.

Call Volume to Contractor Support

Callers: Customers, Contractors, Program Partners

Implementer: TRC Companies

What are the busiest times?

11:00AM - 2:00PM

Avoid calling during this time unless necessary as longer wait times could occur.

What can you do if you are experiencing a longer wait time?

Contractors and Customers can email the program team at info.residential@nyserda.ny.gov for further assistance.

If presented with the option to leave a **voicemail**, voicemails are listened to and responded to daily.

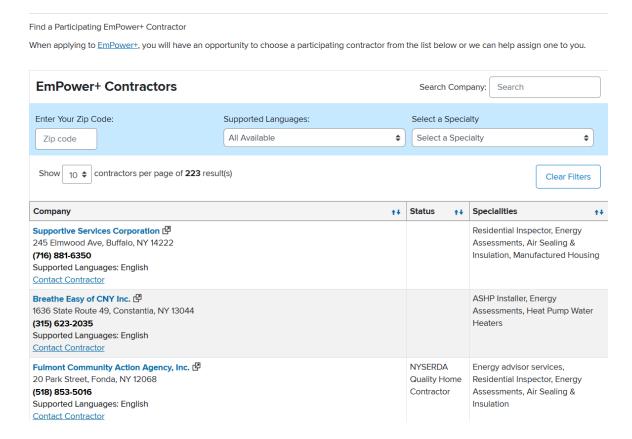
Required Spray Foam Training

- For Participating Contractors in EmPower+ or Comfort Home installing spray foam
- Required spray foam training should be completed no later than October 1st, 2025
- Documentation on completed training is required
- Once completed, a signed document stating completed training should be submitted to <u>support.residential@nyserda.ny.gov</u>
- This attestation form can be found at https://hpwescontractorsupport.com/wp-content/uploads/2025/03/Spray-Foam-Training-Requirements-Contractor-Acknowledgement-Form.pdf

Find A Contractor Website Review

- Please take the opportunity to review your company listing.
- If you feel there are any discrepancies, please reach out to <u>support.residential@nyserda.ny.gov</u>

Find a Participating EmPower+ Contractor



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



Final Question Period

EMPOWER+ & COMFORT HOME

Marketing Resources and Policies

Contractors for Home Modernization program's have exclusive access to a variety of marketing materials and the privilege of using the NYSERDA Participating Contractors Attribution Logo. <u>Program Manual Sections</u> 2.3 & 12.1

Marketing Materials

Materials are available on the <u>Contractor Support website</u> under Program Resources.

Terminology & Messaging

Based on research insights, NYSERDA developed messaging to speak directly to those most likely to engage with Comfort Home and EmPower+. Use the recommend language and terminology in your messaging campaigns.

Any advertisements must first be approved by NYSERDA by contacting Uthman.Aziz@nyserda.ny.gov

Logo Usage

Participating Contractors may not use NYSERDA's logo; however Participating Contractors are authorized to use the NYSERDA Participating Contractor Attribution Logo subject to the restrictions outlined in Sections 2.3 & 12.1 of the Program Manual.



To report misuse of logos, either through incorrect usage or by a non-participating contractor, please send an email to residential.programs@nyserda.ny.gov.