



NY Residential Existing Homes Programs Long Island Transition

NYSERDA's Program Changes for 2017

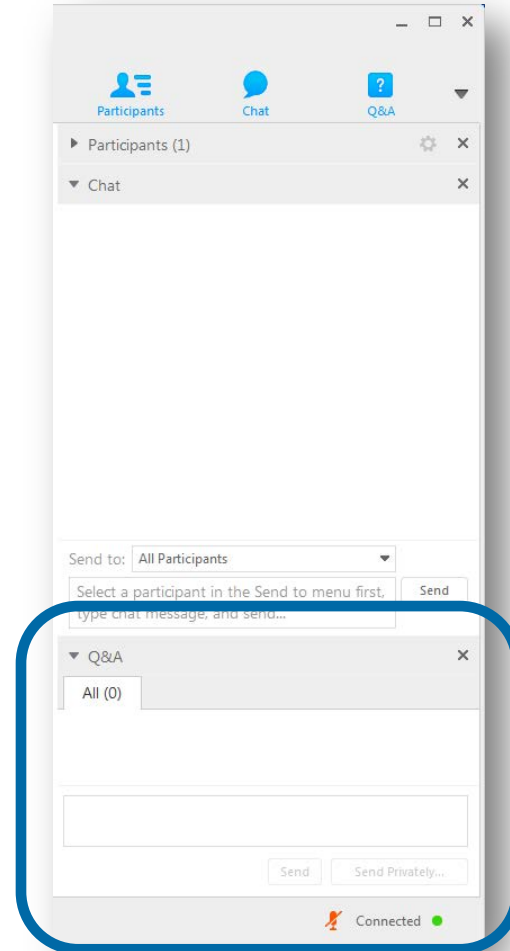
December 13, 2016

Questions?

All participants will be muted.

*To ask a question, type into the **Q&A** field and click **Send**.*

Questions will be answered at the end of the presentation.



Agenda

- Introductions
- EmPower NY
- Home Performance with ENERGY STAR
- Q&A

Introduction

Introduction

- NYSERDA's HPwES and EmPower programs are dominantly funded by the Clean Energy Fund, which is available only to customers of utilities that collect the SBC rate charge.
 - Very limited RGGI funds are available for municipal electric customers, Statewide.
- This webinar is covering the deadlines and important notes regarding NYSERDA's program. It is not intended to provide a detailed explanation of other programs available on Long Island.
- For questions about PSEG LI's program, contact Steven.Wagner2@pseg.com.
- For questions about National Grid's programs, visit www.nationalgridus.com/services-rebates

EmPower NY

EmPower NY

- New applications for EmPower services will be accepted through **December 31, 2016.**
 - New Applications received as of January 1, 2017 will be referred to PSEG
- Contractors referring customers into EmPower must do so by **December 31, 2016.**
 - Please submit application documents for eligible customers to Honeywell directly, as opposed to EFS, to the extent possible.
 - Any missing or incomplete information must be received by **January 7, 2017.**

EmPower NY

- Application assignments and Program eligibility review will be prioritized
 - All projects must be accepted by contractors in CRIS within **5 business days**.
 - Projects not accepted within 5 business days (including those referred by contractors) will be reassigned.

EmPower NY

- All EmPower funded services (including existing pipeline projects) must be completed and invoiced by **March 17, 2017**.
 - Invoices, including any invoice corrections or missing documentation received after March 17th will be rejected.
- Engage with your regional representative early in the process if any projects will not meet these deadlines.
- A limited RGGI budget is available for municipal electric customers Statewide on a first come, first served basis.

HPwES 2016 Submission Deadlines

Free/Reduced-Cost Audits for PSEGLI Customers

- New applications will be accepted through **December 31, 2016**
- Customers must choose a contractor by **January 31, 2017**
- Contractor must claim reservation number by **February 7, 2017**
 - Reservation number expires 90 days after application approval. No extensions will be granted for new applications that come after December 13, 2016.
 - Once audit is performed, please complete the Audit Claim task in the NY HP Portal within 14 days.
- All GJGNY audit incentives must be claimed no later than **April 15, 2017**

Market Rate HPwES

The Market Rate 10% contractor incentive will be available in PSEGLI territory through **December 31, 2016**. To receive this incentive, worksopes must be *submitted* to the NYSERDA Program no later than 11:59 PM on December 31, 2016.

Submission date is defined as when the project is first assigned to CLEAResult for review. **In the Portal**, that means fully completing the EST and Contract Submission stages by Dec 31, 2016. **For HPD Follow-On** projects, the job submission paperwork must be received via fax by CLEAResult by December 31, 2016.

Assisted HPwES

- New customer subsidy applications must be submitted to EFS by **December 31, 2016**
 - AHP pre-approvals are valid for 180 days. No extensions will be granted for the NYSERDA Program beyond June 30, 2017.
 - Customers with current AHP pre-approvals will not have to submit a new application for PSEGLI.
- Workscopes must be submitted to CLEAResult by **January 14, 2017.**
- There is no deadline for approval processing. The project must simply be submitted to EFS and/or CLEAResult within the parameters of the Subsidy expiration date. Requests for expedited reviews and not necessary.
- All projects must be completed AND completion paperwork submitted to CLEAResult before the Subsidy expiration date.

Program Offerings on Long Island for 2017

Program Offerings on Long Island for 2017

Free/Reduced-cost audits

- The NY HP Portal will deny online applications for PSEGLI electric customers effective January 1, 2017.
- The paper GJGNY audit application will also be updated.
- New audits for PSEGLI customers should be submitted to the PSEG Long Island Program starting **January 1, 2017**.
- NYSERDA will have *limited funds* for the GJGNY audit for municipal electric customers on Long Island (Freeport, Greenport, Rockville Centre). Due to the limited budget, it is not recommended that you have a specific targeting effort.

Program Offerings on Long Island for 2017

- NYSERDA's Residential Financing remains available Statewide and is available through both NYSERDA and PSEGLI's Programs.
- NYSERDA will continue to offer SEL and OBR Loans for customers on Long Island who are not eligible for PSEGLI's Program. These projects will be eligible for financing only; no contractor incentives or AHP.
 - Customers with natural gas heat and no existing central AC
 - Projects for an oil to gas conversion only and do not include any PSEGLI eligible measures
 - Municipal electric customers
- Contractors should submit worksopes to the most appropriate program for incentives and financing in 2017. Customers with current EFS loan pre-approvals do not have to submit a new loan application for PSEGLI.

Program Offerings on Long Island for 2017

Contractors are encouraged to utilize incentives offered by the Long Island utility providers and local entities in 2017.

- PSEG Long Island (HPwES, AHP, Financing, Cool Homes, appliance rebates)
<https://www.psegliny.com>
- National Grid (Rebate Program, Gas Conversions, Low Income)
www.nationalgridus.com/services-rebates
- Local funding (city, county, or community sponsored)

Program Offerings on Long Island for 2017

NYSERDA will be sending communications to customers in the pipeline regarding the Program transition on Long Island. NYSERDA will also provide language that contractors can share with customers who have questions.

- EmPower application pipeline
- Audit reservation number pipeline
- AHP and Loan pre-approval pipeline

Customers will be redirected to either the PSEGLI HPwES or National Grid as of January 1, 2017.

HPwES Project Submission Process in 2017

NYSERDA HPwES Project Submissions for 2017

Customers who do not qualify for the PSEGLI Program and would like to pursue NYSERDA's Residential Financing must be submitted through the new Express Contract workflow in the NY HP Portal.

- RHA will be retired in early 2017. No new RHA project submissions will be accepted after December 31, 2016. All workscopes must then be submitted in the NY HP Portal using an approved HPXML modeling tool.
- The HPwES Contract workflow (EST) is also being phased out. The automated Express Contract workflow has been in pilot and is expected to roll out to all contractors soon.
- Contractor training for Express Contract will be provided before launch. More information is currently available on the Contractor Support website.

NYSERDA Project Submissions for 2017

Express Contract has some significant advantages over the Eligibility Screening Tool in the Contract workflow.

- Express Contract is fully compatible with HPXML files.
- Fewer user inputs are needed to screen measure eligibility. All necessary data is pulled directly from the HPXML file.
- Contractors can receive automated workscope reviews and instant feedback.
- It's possible to go from project creation to workscope approval within a few minutes.
- Express Contract receives real time pre-approval data from EFS' system, which does not require manual verification.

HPwES Completion Deadlines

HPwES Completion Deadlines

NYSERDA workscope approvals automatically expire after 90 days. Please reference the “**HPwES Project Approval Valid Until**” date in Section 2 of the Eligibility Summary Report, or the “**Project must be completed by**” date on the NY Optimization approval transmittal.

Projects not submitted for completion within the 90 day deadline may be denied NYSERDA incentives and required to go through the PSEGLI Program instead. This would include remodeling the home in HPXML.

If you know up front that a project will need more than 90 days to complete, it would be best to submit it to PSEGLI’s Program in January.

HPwES Completion Deadlines

Portal Eligibility Summary Report

Section 2. Project Information and Scope of Work

HPwES Project Approval Valid Until: 3/9/2017

Amount of Work Eligible for Incentives: \$5,800.00

Existing Primary Heating Fuel Type: Natural Gas

Fuel Switch: (Yes/No): No

NY Optimization Approval

The following job scope has been reviewed and found to comply with current HP/AHP Program requirements. Reviews of AHP, Loan, and 10% HEMI jobs automatically expire 90 DAYS from the date of transmittal. Projects not completed within this timeframe must be re-approved by CLEAResult under the current program eligibility rules.

NOTE: CLEAResult has reviewed the project according to program rules and has determined that it meets the cost-effectiveness requirements. GJGNY Loans over \$13,000 must also achieve pay back less than 15 years. For On-Bill Recovery Loans, the monthly loan installment payment amount may not exceed 1/12th of estimated annual dollar savings. Weighted Useful Life of Measures = greater than 15 years.

Project must be completed by: 3/9/17

HPwES Completion Deadlines

The due dates in the Portal do not align with the workscope approval expiration dates. **Extending the due date in the Portal *does not* extend the project completion deadline.**

Updated 87 days ago

The Final Project Submission task becomes past due after 60 days. Use the dashboard to help manage your pipeline.

24 days past due

Past due

[View Details...](#)

Due date: Aug. 12, 2016

[Extend Due Date](#)

Extending the due date will “snooze” this reminder, but does not change when the workscope approval expires.

HPwES Completion Deadlines

PSEG LI has set a completion deadline of **February 19, 2017** for all PSEG LI eligible projects submitted through December 31, 2016 using RHA.

Requests for extensions of PSEG LI incentives should be submitted to Steven.Wagner2@PSEG.com, not CLEAResult staff.

If the PSEG LI eligible measures are installed, but some NYSERDA eligible measures remain incomplete (i.e. heating systems) it is possible to process the PSEG LI and NYSERDA project incentives at different times. Doing so would require two test-outs. Your CLEAResult Account Manager can provide assistance on a case-by-case basis.

HPwES Pipeline Cleanup

HPwES Pipeline Cleanup

An Account Manager from CLEAResult will be reaching out to each contractor to discuss your HPwES audit and project pipeline. Please work with them to review each project and determine the appropriate next steps. This is an opportunity for you to discuss how certain projects should be handled if work will not be completed by the deadlines.

Requests for extensions on NYSERDA workscope approvals should be sent to your assigned Account Manager, or contractorsupport@clearesult.com.

Remember that projects must be submitted for completion within the 90 day deadline in order to receive NYSERDA incentives. Otherwise, it will be required to go through another program. Contractors must manage their pipeline accordingly.

HPwES Pipeline Cleanup

If you know a Portal project is not moving forward, please click on “This task cannot be completed” to deactivate it. Selecting “Did not get business” or “Could not contact” will change the status to Closed – Removed and remove the project from your active pipeline list.

Each contractor is responsible for keeping their project pipeline up to date and deactivating their dead leads on a regular basis.

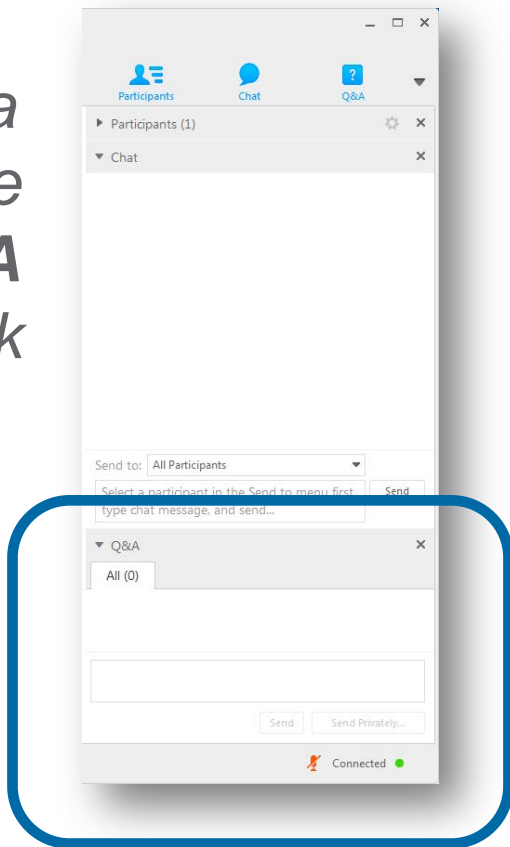
Why couldn't this task be completed?

- Making corrections to the existing building model
- Only changing customer incentive type(s) or loan amount
- Updating workscope documents on file. Project costs and measures remain the same
- Adding or removing measures and/or costs in the workscope
- Referral work is being added to this project
- Did not get business
- Could not contact

Q & A

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