NYS Clean Heat Working Group Series
for Participating Contractors & Industry Partners

Session #10
February 10, 2022, 8:30 am–10 am

NYS Clean Heat
Joint Management Committee

NEW YORK STATE OF OPPORTUNITY. | NYS Clean Heat

Agenda

> **Meeting procedures**

> **Welcome**

> **Safety Message**

> **JMC updates and discussion**

  — New 2022 required training

  — Online Intake Tool (OIT) status updates

  — ICF process cycle times for completed projects

  — Detail on flawed project process

  — Application and flawed project deadlines

  — Follow-ups from 12/16 meeting

> **Resources, support, and next steps**

Meeting procedures

Before beginning, a few reminders:

> **All attendees will be muted**

>> For questions or comments throughout, please use either the Raise Hand or Q&A functions

>>> Hover your mouse over your name in the Attendees list in order to see the Raise Hand icon displayed

>>> When you have finished asking your question, select the Raise Hand icon again to lower your hand

>> If an attendee opts to use the Raise Hand function to ask a question or make a comment, the meeting moderator will call on that attendee and unmute individually

>> Q&A function is private – the team will share public responses as appropriate

> Slides, notes, and a compilation of Q&As will be posted after the meeting

> If technical issues arise, please contact Paul Dauderis
pdauderis@ceadvisors.com

Q&A

Raise Hand

Welcome

Joint Management Committee (JMC) Co-Chairs:

> **Will Xia**, Con Edison

> **Donovan Gordon**, NYSERDA

> *Other JMC Members:*

— **Ray Cotto**: Central Hudson

— **Steve Coulter**: Con Edison

— **Jennifer Cross**: National Grid

— **Nicole Williams**: NYSEG, RG&E

— **Mark Maloney**: Orange & Rockland

> *Our implementation team today:*

• **Mike L'Ecuyer**: ICF

• **Kenn Latal:** ICF

> *Our Working Group support team:*

• **Ben Davis:** Concentric

• **Pieter Zwart:** Concentric

• **Clara-Ann Joyce:** Concentric

Working Group Series
Review of typical meeting format

> **Working meetings between Participating Contractors, industry partners, and other stakeholders with the NYS Clean Heat Program Administrators**

> To foster:

— Transparency

— Coordination and communication

— Prioritization

— Solution development

Working Group Series
Review of typical meeting format

> **Updates on previous topics** (various)

> **Stakeholder presentations**

— Presentation (5m)

— Discussion time will vary by topic (5-30m)

Safety Message – Removing Snow/Ice from Car

> Prepare to give an extra 10-15 minutes in the morning

> Start your car and warm it up

> Brush off loose snow and scrape the glass for any ice

  – Don't forget lights

  – Don't forget license plates

> Check the mud flaps and wheels for ice build up

New 2022 required training – Cold Climate ASHP Sizing and Design

> **Effective January 1, 2022, in addition to all other enrollment requirements, all _new_ ASHP installers seeking to become a NYS Clean Heat Program Participating Contractor must _also_ provide documentation that they've completed an ASHP manufacturer-sponsored Cold Climate ASHP Sizing and Design Training requirement**

— NYS Clean Heat also strongly urges all participating contractors who enrolled prior to January 1, 2022 to take advantage of this training opportunity

> **NYSERDA developed a [course curriculum](#) guide and [training presentation content](#) and introduced it to ASHP manufacturers in April, with the understanding that this training would be delivered by these manufacturers through their existing training channels**

— Utilizing the course curriculum guide, manufacturers had the option to create a standalone module, or embed into a broader training

— Manufacturers could use an off-the-shelf, brand agnostic training available to use outright, or adapt from

— With no current listing of these training offerings available, contractors are encouraged to reach out to their distributor or manufacturer representative for details on the availability of trainings

Online Intake Tool (OIT) Improvements Status Update

> **Previous sprint items completed in 2021**
>> — Filtering on dashboard, exporting data, adjusting columns, premise info in emails, deploy text messages, coordination of messaging with OIT changes, HPWH OIT alternatives, status glossary, tips on fields, aging of current status

> **First three 2022 items completed 1/18**
>> — Fields for Con Edison and ORU Category 2A and 2B
>> — Fields for NYSEG and RGE OIT to enter LMI flag
>> — Activate note/comment field for contractors to fill out if they want to on new applications

> **Last item (add total project aging to dashboard) was more problematic across all statuses - this was not a feature focused on by contractors during their survey**

> **Plan is to create two helpful reports within the OIT, not just add aging column**
>> — One report for paid projects with a date range – can be used by contractors to verify payments just received, especially ACH contractors – can include aging cell
>> — One report for all other statuses – can show both aging within status and overall aging
>> — Scheduling for 5/1 sprint

OIT Improvements Status Update

| Improvement	Feasibility	Notes	Estimated ETA
Add total project aging on the OIT dashboard	Medium	Alternative report solution will provide more functionality than adding a column	5/1/2022
Include equipment model and serial number for contractor to check before submitting	Medium	Allow contractor to check on the equipment in their project before submitting - looking at summary vs. improvement page for the location	5/1/2022
Cloning Measures	Medium	Planning to develop such that only serial number will need to be entered for the cloned equipment - new functionality coded for all ICF OITs	5/1/2022
Smarter existing equipment type entries, based on fuel type entry	Medium	Inquiry underway on feasibility of restricting equipment type DDL based on fuel type field	5/1/2022
Column for Project Number not wide enough	High	Columns can be hidden to widen remaining columns; other option is to export to Excel manually. IT team is redesigning layout.	5/1/2022
Make all versions of OIT identical	High	Harmonize order of fields across OITs	5/1/2022

> Items previously targeted for 5/1 unchanged

> Also shooting to re-order some fields for the 5/1 sprint to make the OITs more harmonized

OIT Improvements Status Update

Improvement	Feasibility	Notes	Estimated ETA
Make all versions of OIT identical	High	Longer term: common OIT platform, combined w better JMC program design harmonization	8/31/2022
Deploy bulk upload tool like the one deployed for Con Ed	High	The OIT bulk upload tool is complex b/c of attachment capability - requires one OIT platform.	9/30/2022

> Most important and permanent change – truly one OIT platform

ICF Process Cycle Times for Completed Projects

Processing Time (Avg Days) from Receipt to ICF Approval Through 1/31/22
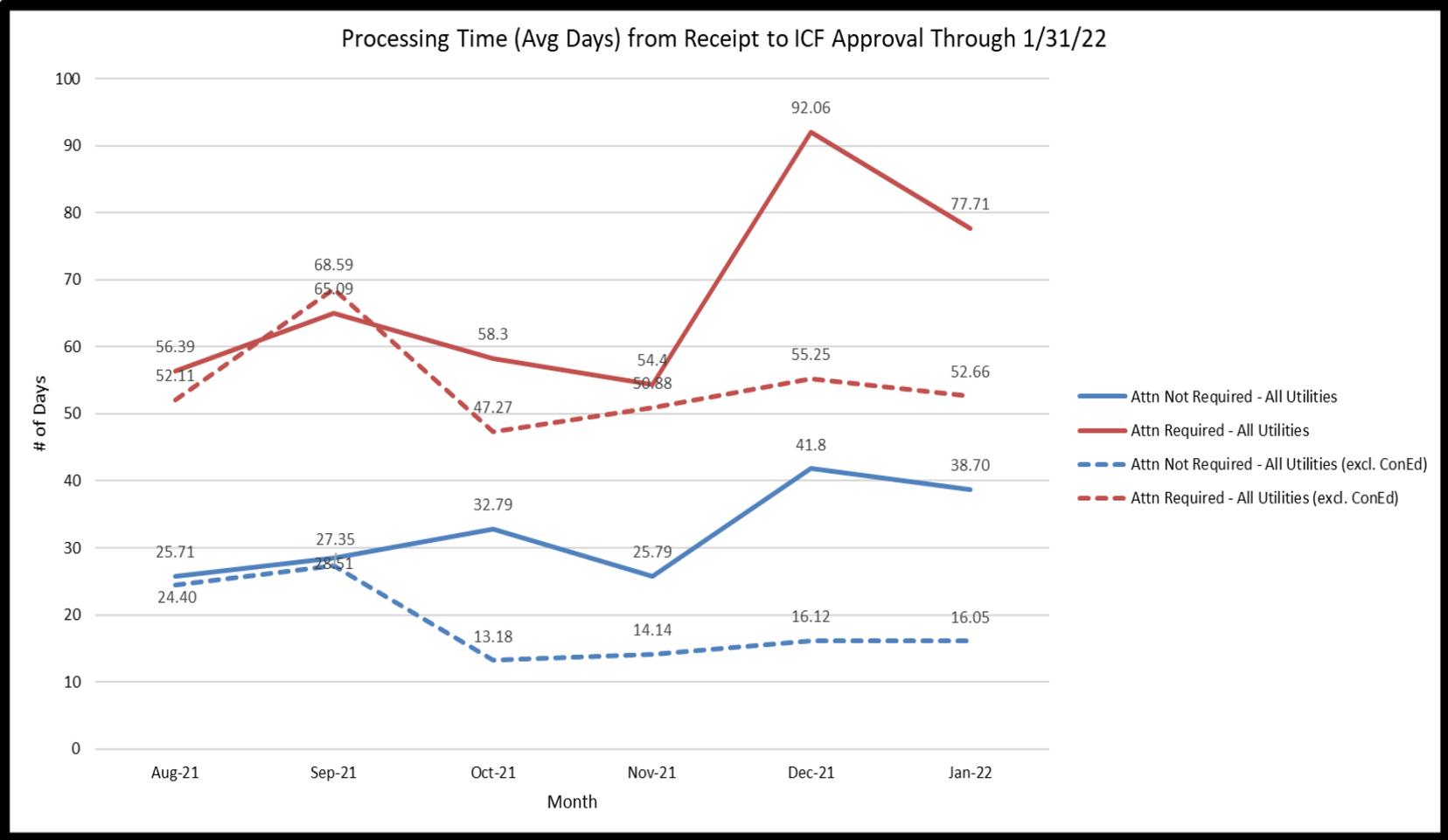
> Projects not requiring attention for non-Con Edison utilities consistently under 20 days

> Average times for all utilities and for non-Con Edison utilities (dotted lines) went up in Nov-Dec but we were able to bring them down in January

> Reported by Quarter previously, now by month – final 2021 w corrections

> Processing times go up in the short run due to focus on processing older projects, then come down

> End of year clean-up focusing on Con Edison's and other utilities' older projects – clemency granted on minor items such as photos

— Some projects taken through to payment without flaws

Detail on Action Required Project Process

> **Current process in place to identify application deficiencies upon submission and immediately communicate with the contractor to remediate them:**

- When the ICF processor identifies an issue, the application is moved to "Attention/Action Required" status and the contractor is sent an automatic email with the details about the issue.

- A follow-up email is sent 14 days after the first email if contractor does not respond.

- The ICF account manager calls and reviews with the contractor following the second email.

- Applications which are not remediated after 90 days are moved to an inactive status.

> **Process improvements to reduce the number of "Action Required" projects, avoid future backlogs and improve communication with Contractors:**

- Provide extra automated email reminders that action is required to resolve projects.

- Increase regularly scheduled account manager/contractor meetings with active PCs.

- Include details in School of Clean Heat on common submission issues.

- Utility program managers are also available to assist with issues

Application Deadlines for Process Improvement

Context: The JMC plans to implement two new rules to complement Clean Heat Program staff account management process improvements, and improved communication to contractors, to resolve application flaws sooner and prevent future backlogs.

Effective March 1, 2022, Clean Heat Program staff will set new deadlines for Clean Heat Participating Contractors to submit prescriptive project applications and to resolve application errors to help facilitate timely application processing.

> **Establish a 45-day deadline for contractors to resolve applications with errors**
>   - **Purpose:** Ensure application errors are resolved in a timely manner
>   - 45-day clock begins when the "Attention/Action Required" notification is issued, this means the application has errors and an email or text was sent to the participating contractor for further action.
>   - If deadline is missed, move project to "Application Inactive" status
>   - Contractors may still complete an inactive application after the 45 days by submitting corrected documents without needing to restart the application

> **Establish a deadline to submit new prescriptive project applications within 60 days after project is commissioned**
>   - **Purpose:** Avoid potential for flaws/application processing delays that can result from late submitted applications for projects installed prior to periodic program updates
>   - If a submitted application has errors or is incomplete, application will be moved to "contractor action required" status and the clock will start on a new 45-day window to resolve the application errors

Follow-up resources from 12/16 meeting

> **Follow-up resources:**

— OIT Status Glossary is posted on the OIT documents page here ([Clean Heat OIT Status Glossary (programprocessing.com)](programprocessing.com))

— A step-by-step guide for the OIT is available on the Help page of each utility's OIT tool

— ACH payment application guidance is posted on the NYS Clean Heat Resources page under Working Group Series – General Reference ([ACH Payment Guidance](#))

Program Manual Update – 3/1

> **Integrating Previously Announced Con Edison, Central Hudson, Orange & Rockland Incentive Changes**

— For ccASHP Category 1, 2, 2a and 2b residential (1-4 unit) projects installed on or after March 1, 2022

— Central Hudson will begin offering a 2b adder incentive for ASHP full load heating + decommissioning on March 1, 2022

— Con Edison Natural Gas-constrained Area Kicker Incentive

— Link: NYS-Clean-Heat-Residential-Incentive-Updates-Effective-20220301.pdf

> **Application Deadlines for Process Improvement (see previous slides)**

— 45-day deadline for contractors to resolve applications with errors

— Deadline to submit new prescriptive project applications within 60 days after project is commissioned

Resources, support, and next steps

> Next PC&IP meeting on **Thursday, March 10th, 2021** (8:30 AM-10 AM)

  – Proposals for discussion at the next Working Group must be received by **February 1st** and can be submitted to NYSCleanHeat@ceadvisors.com.

> NYSCleanHeat@ceadvisors.com – for *program*-related inquiries

> NYSCleanHeat@icf.com and (844) 212-7823 for *project*-related inquiries

> NYS Clean Heat Website - (https://saveenergy.ny.gov/NYScleanheat/resources/)

NYS Clean Heat Project Status Inquiry Process

Project inquiries

1. Contractor reaches out to their dedicated account manager (AM) for issue resolution first

2. If the AM does not respond within three days contact NYSCleanHeat@icf.com or the Utility Program Manager as listed below. These Program Managers work for their respective utilities, which have contracted with ICF to handle applications.

Utility Program Manager contacts

> **Central Hudson:** Ray Cotto, Assoc. Energy Efficiency Program Manager

Phone: (845) 486-5750, Email: RCotto@cenhud.com

> **Con Ed:** Will Xia, Program Manager, Phone: (646) 761-1851, Email: xiaw@coned.com

> **National Grid:** Jennifer Cross, Senior Program Manager

518-433-5034, Email: Jennifer.Cross@nationalgrid.com

> **NYSEG/RG&E:** Nicole Williams - Program Manager, Conservation and Load Management
Phone: 585-484-6592, Email: nicole.williams@nyseg.com

> **Orange & Rockland:** Mark Maloney Phone: (845) 577-2433, Email: maloneym@oru.com

Resources, support, and next steps

> **Email blasts** – twice per month

  1. Early week following Working Group: next steps, including PowerPoint and meeting notes

  2. Week prior to meeting: Agenda items and report-out on prior items

> All program documents are located on the NYS Clean Heat Resources page (https://saveenergy.ny.gov/NYScleanheat/resources/)

> All regulatory proceeding documents are located on the NYS DMM (http://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?Mattercaseno=18-M-0084)

Thank you!