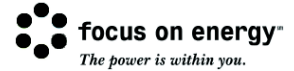




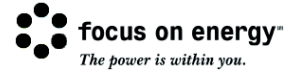
## Home Performance with ENERGY STAR® Online Forms Webinar Questions and Answers



- 1. Can we print the screen that shows our customer(s) status summary?**  
Yes. The Project Status Report now has a button for Printable Version.
- 2. How do we fill out the Customer and Provider reward forms for LP, Wood and Oil w/top 3 recommendations completed (\$250 for customer and \$100 for consultant)? Can we use these forms when working for customers on non-participating utilities?**  
We are working with our IT on being able to add customer and provider rewards for LP, Wood and Oil customers. We will keep you informed when this option becomes available.
- 3. Are you folks paying for all this data entry time?**  
No. We have combined the three forms so the customer information only has to be completed once and it carries over from form to form. By having the information filled out online with required fields completed, it eliminates a lot of incomplete, hard to read and other paperwork that ends up in a problem folder and cannot be processed immediately.
- 4. When updating rankings, can you change it so that lower rankings will automatically update? For example, say you have 6 recommendations and you decide to change your #6 to #1, my understanding of the current form would require me to change all six rankings, quite a waste of time.**  
The recommendation which had the original priority listed will become blank. You would then only have to assign a new priority to the recommendation that is blank. The other recommendations' priorities will not be affected by this. For example, if you had air sealing originally listed as #6, and floor insulation as #1 and you now want to change the priority on air sealing to #1, floor insulation will change to blank so you can assign a new priority number to it (all other recommendations will remain as listed before).
- 5. What is the benefit of completing the HP form at the client's site rather than back at my home office – particularly with a rating that requires additional computer time completing the data in REM/Rate?**  
Completing the form at the customer's house allows you to fill out the information electronically so you do not have to fill out the form by hand; you can assign priorities that you think will work best at that time, but especially with a rating, do not submit the recommendations until you have done the modeling in REM/Rate and until you are sure the recommendations are prioritized in the best way possible as once submitted changes cannot be made.
- 6. How are additional utility rewards (i.e. WPS) integrated into this process?**  
WPS bonus rewards are listed under the recommendations. We are working on having these rewards populate automatically if the required criteria are met.
- 7. Can you put the reference number in a different font so that it will be easier to tell the difference between 1, l, I (same thing for O, 0)?**  
Yes. The original font was Calibri and it will be changed to Times New Roman which is easier to read in this context.
- 8. Are other forms still required, like the CO safety work sheet?**  
Yes. The CO safety work sheet is still required, but this form is included in the Data Collection Form. You will still need to submit the Data Collection Form, Certificate of Completion and any other applicable forms either via attachment in the online form or via fax. If sending any documentation via fax, please make sure to include the Reference # or Rating # if it is a Rating. Checksheet of Recommended Measures is the only form that will no longer need to be submitted. We are working with IT to have a list of all required documentation for both Assessment and Rating listed in the online form for easy reference.
- 9. If working in a house where there is no internet access, can you download the form to enter data electronically on your laptop and download it later or do you have to use paper?**  
If the home does not have internet access, our recommendation is to print out the PER form either blank or filled out with the customer's information (name, address, utilities), complete the form manually while at the home and then once back at the office go into that customer's record and add the recommendations at that time. As a reminder, phones with Internet access or Blackberries can be used to access the online form. You may also consider using a USB modem.



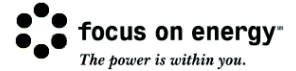
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- 10. Can you add custom details to recommendations or just select from a pull down list?**  
The drop down recommendations are attached to specific Home Performance with ENERGY STAR Incentive Rewards. However, you can add more specific recommendations that are not in the drop down list in the section under Combustion Safety Report (We strongly recommend the following course of action).
- 11. Do the forms work on Mac using Firefox?**  
Yes.
- 12. Are rewards entered automatically? What I mean is does the form program decide which rewards are eligible depending on utility and enter the correct reward amount or does the consultant have to enter that \$ figure?**  
Yes. We have the forms programmed to check the utility in the background so if the consultant selects a reward that the home is not eligible for because their utility is not participating, the system will not let them add this reward. The reward amounts are added automatically. If the cost of the installation is lower than the reward, the reward amount will automatically change to the cost of the installation.
- 13. In the details section for each measure, can you add custom details or just select from a pull down menu?**  
The pull down menu options are the only options available.
- 14. How do we process rewards for old clients with your new system when they are not in it?**  
If the paper PER was sent in to WECC before, the customer will show up in the consultant's Customers list. The consultant will then just go to that customer record and add the recommendations, prioritize them and then add the post test installation information and submit the Customer Reward Form after all measures installation status has been updated.  
If the paper PER was not sent in to WECC previously, the consultant will need to add the customer in the online form.
- 15. How important do you think it will be for us to have internet access at the customer's house for entering data?**  
In order to access the online form, you have to have internet access as the form is on a website and is submitted via this website to us. You may also use a USB modem for this purpose.
- 16. Can the updated ally list be attached or easily accessed from the online form?**  
Yes. The updated list of allies is included in the online form. Once you start typing the ally's name (in the ally box), it will bring up a list of all of our current allies that start with those letters.
- 17. I'm concerned about PER recommended measures being "carved in stone". Any wiggle room after the fact?**  
We recommend that you add the recommendations and put in the priority ranking while you're at the home, but you do not have to submit the form immediately. You have the ability to go back to your office and re-evaluate the recommendations and priorities before submitting (and in case of ratings we advise that you model the home using the REM/Rate software and then based on your findings make necessary changes to the recommendations you added at the house). After you have completed all modeling and made all the changes you wanted to make, you can submit the form online.  
  
If there are any special circumstances that occur at the home between the time the PER and the post test is done, please contact the office via email and provide an explanation as to the reason for changing the priority ranking.
- 18. What format should the images and documents be sent in?**  
Most of the formats should be fine: .doc, .pdf, .jpg, .blg, .gif. If we receive any documents that we cannot open we will let you know.
- 19. Do we input the jobs we have done since January?**  
If you have not sent in the PER in paper form to WECC then yes, you can add these jobs online.
- 20. What if Homeowner completed the job?**  
Under the Contractor category there is an option of Self Install. If the customer completed the job, the consultant should choose Self Install from the contractor drop down list.



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- 21. Can I get this form on an editable pdf file so I can use it “in the field” on my Netbook?**  
We will have an editable pdf available that you can use; but you will still need to enter the information in the online form in order to submit it to WECC (the pdf will not transfer the information to us).
- 22. Can we get the PowerPoint from the webinar for future reference?**  
Yes. The PowerPoint is available on the Homes Partners page along with the recorded webinar.
- 23. How do we get the customer signature on the reward form?**  
We have provided a checkbox that says, “Customer signature on file” on the Customer Reward Form. If you print out a copy of the PER form before going to the home, customer’s signature can be obtained for your records, but we do not need to have it on the actual form as long as this box is checked.
- 24. Can WECC staff make changes to the PER after it is submitted (if a mistake was made, etc.)?**  
Yes we can.
- 25. Couldn’t the Provider reward be automated?**  
The Rater Completion \$50 reward is added automatically. We are also working on automating the Ally referral reward.
- 26. Will it be possible to e-mail a copy of the recommendations to the client in lieu of leaving a copy of the 3 part form?**  
Yes. You may save a copy of the pdf and then attach it in the e-mail to your customer.
- 27. Can we enter customer info and then print the form with it in its place?**  
Yes. To do so, go into the Customers screen, find the customer record, click on Edit next to the address and click on Edit when you are in the Customer Legal Information screen. At the bottom of the page you will see Print Evaluation Form and this form will print with the customer name and address.
- 28. I have a customer with primary address in another state, but who owns a home in WI. Can this be entered in on-line form?**  
If the home that has the Preliminary Evaluation done is in Wisconsin then yes. In this case, this home address type would be Location. When the post test is done and you are submitting the Customer Reward Form, you have the option of mailing the check to the customer’s primary address and you would then select Alternate Address from the Payment Address drop down and add the out of state home’s address.
- 29. Why am I making recommendations to the customer before I see the simple payback? Why would I do a rating if I already set my priorities without seeing the data? Why can’t I change my priority number if I see the data and figure out that one retrofit is actually better than one that I suggested?**  
Please see the answer to question 18. You can make preliminary recommendations and prioritize them while you’re at the home. However, once you are back at the office you can follow your regular protocol and make any changes you need to prior to submitting including changing/deleting/adding recommendations and changing the priority numbers if you need to. It is only after you submit the form that you would not be able to make these types of changes.
- 30. Will Focus award rebates based on the Preliminary Evaluation Reports, the detailed Evaluation Reports, the REM/Rate building files, or the client rewards form?**  
The Focus incentives are paid based on the Customer Reward Form providing that all the installation information is complete and that all of the required documentation and invoices are attached (or sent in).
- 31. Do we still need to send in a pdf of the Data Collection Form?**  
Yes as the Data Collection Form is not available online.
- 32. Can we send in the Data Collection Form at the time of rewards?**  
Yes. We have included a list of all required documents that must be sent in both in the Projects screen and in the Customer Reward Form screen so you may click on it and see all of the required documents that must be attached or sent in.



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- 33. How do we document Pass/Fail operation of equipment? How do we list multiple heating furnaces, boilers and hot water heaters for the combustion safety portion of the form?**  
This information would be added under the Combustion Safety Report in the Projects screen. You can tab over from field to field and choose Pass, Fail, N/A from each drop down. You can also add additional equipment under Other and specify what kind of equipment it is and if it Passed or Failed. If you need additional space to document other equipment, you can do so in the section "We strongly recommend the following course of action(s):"
- 34. Do we still have to send the hard copy of the PER form with the customer's signature to you?**  
No. We do not need to have the customer's signature on a hard copy. If you obtain customer's signature (for your records), we would just ask that you check the box "Customer signature on file" when completing the Customer Reward Form information.
- 35. Can we fill out the PER form and the post test paperwork at the same time?**  
Yes you can, but it is not recommended as it skews forecasting reports. We may re-visit this issue in the near future to determine if a time limit needs to be placed.
- 36. Is the IT group working on new forms for the WESH program?**  
Not at this time. We are hoping that in the future we will be working on the WESH forms as well.
- 37. Can multiple consultants working for the same company access a common list of customers?**  
Yes. In that case, only one user name and password would be issued for both consultants to use so they are able to access the same list.