

# Best Practices

## Useful tips for online data entry

### Access

To access the HP Online Forms please use this secured link below. If you have previously saved a different website address for online forms, please replace it with the current one.

<https://webforms.focusonenergy.com:444/HPES/Instruction/Default.aspx>

### Customer Search

- Ability to search by Customer Last Name, Address, Rating ID # and Project ID #
- When searching using Rating or Project ID #, click Apply Filter
- Project ID # has been added on all screens by the project type
- If you find the customer and receive a message that you do not have access to this customer as they already exist, contact Tony with customer name, address and project type (assessment or rating) and he will link them to your list of customers.

### New Customer

- When adding a second customer, full first and last name must be entered.
  - e.g. Correct entry - Melissa Jones
  - Incorrect entries – Melissa J, M Jones, Melissa
- When adding the address, do not use spaces or punctuation in the street number and do not include the street type with the street name. Please select the street type from the drop down.
  - e.g. Correct entry – W123N456 Johnson St
  - Incorrect entries – W 123 N 456 Johnson St., W-123 N 456 Johnson Street

### Updating Utility Information

- Search for the customer and click Select - it will take you to the Customer information screen right away. Click Edit. This will bring you to their address and utilities screen where you can update their utilities and heating and water fuel types.
- Find the customer in your list of Customers and click Edit so you're looking at the Customer Legal Information screen. Then click Edit again and you'll be able to edit the utilities and fuel types.

### Project Info (Preliminary Evaluation)

- **General**
  - Make sure to select if you're a Rater or Contractor and the business you work for. This information is crucial for Provider Form to populate correctly.
  - Make sure to enter the evaluation date – use the calendar icon for best results.
  - For HERS score, please enter preliminary HERS score. If entering information at the customer's home, enter a general number (e.g. 100) and then when you do the modeling of the home in your office, update the form with the correct HERS score number.
- **Adding recommendations**
  - Add at least one recommendation before submitting the form.
  - For WPS projects please make sure to add **ALL** recommendations prior to submitting PER as the WPS bonuses are based on recommended measures being installed. (Please see WPS notes at the end of this document for detailed information).

- If you are not able to add a recommendation, please check the gas utility and heating fuel type to make sure they are listed (these can be checked/edited in the Customer Information screen).
- **Submit Recommendations button**
  - If you are not able to see the Submit Recommendations button, check to see if you have any missing information (you should see a message in red telling you what may be missing; also make sure you have all measures with an assigned priority number).
  - If you are not able to add a recommendation, please check the gas utility and heating fuel type to make sure they are listed.
- **Printing PER form**
  - You can print a completely BLANK PER form from your Customers screen
  - You can print PARTIALLY COMPLETED PER form from the Customer Information screen (where the address and utilities are listed) with just the customer name, address and utility info
  - You can print a COMPLETED PER form from the Projects screen after you add your recommendations

## Customer Reward Form

- **Attachments**
  - When filling out installation information, you only need to check the box Attachments required if you are going to be submitting the receipts, data collection forms, etc. electronically – attaching them with the Customer Reward Form online. If you are going to be faxing these to our office, do not check this box as it will prevent you from submitting the form. Checking this box will prompt you to attach the documents before you submit the Customer Reward Form.
  - Make sure to attach all documents **BEFORE** you submit the Customer Reward Form. Attaching the documents after the form is submitted **will not** send these to WECC until you submit the form again.
  - A single scanned document in PDF format works best, especially if it includes all the attachments related to a single HP project (invoices, receipts, data collection form, etc). Building file (blg file) does have to be attached separately.
  - If sending documents in jpg format, please make sure to combine them into one document (rather than multiple pages).
  - If you can't attach scanned documents, please email them to [ratings@weccusa.org](mailto:ratings@weccusa.org) (fill in the subject line with the customer name and project #) .
  - Any mailed or faxed in supporting documentation must have the HP project # in the upper left corner so that we can match it with submitted online forms.
  - If sending supporting documentation by email or fax, please do so right after you submit the reward forms through the HP web interface.
  - If you have one invoice with multiple measures on it, you only need to attach it once. Please indicate on the invoice what measures it is for.

**Please be sure to review all of the supporting documentation prior to submitting any HP rewards. There should no longer be a need for “problem” file review now that we have the new HP web interface.**

- **Contractors**
  - Under Installation Information for any particular measure, start typing the name of the contractor and a drop down will appear from which you can select them. These are **only Installing Allies**.
  - If the contractor who installed the measure is not displayed, they are likely not an Installing Ally. In this case, you can start typing **Outside Agency** and then select it.
  - If the homeowner did the installation, start typing **Self Install** and then select it.

- Once you select one Contractor, the system will automatically populate their name for all installed measure but you can select a different contractor at any time prior to submitting the Customer Reward Form.
- **Cost of installation**
  - Please estimate to the best of your knowledge what the cost is for this particular measure. Please do not include the total invoice amount as the cost of one measure. The cost for all measures should total close to the amount on the invoice.
  - If the homeowner installed the measure, use the cost of the materials as the cost of installation.
  - Please also note on the invoice what the invoice is for (e.g. attic insulation, air sealing, kneewall).
- **Air Sealing rewards**
  - Previously when one Air Sealing measure was recommended but the achieved result was higher or lower than the recommended measure, you would have needed to cancel the originally recommended measure and add the new Air Sealing measure.
  - The online form will now automatically do this logic behind the scenes, so all you have to do is input the post-test cfm.
    - Example 1: if you recommended 400 cfm reduction but the actual post test reduction was 1400 cfm, the system will re-calculate the reward and add in the correct Air Sealing reward of \$125.
    - Example 2: if you recommended 1000 cfm reduction but the actual post-test reduction was only 500 cfm, the system will re-calculate the reward and add the correct Air Sealing reward of \$75.
  - If the original cfm is pretty low and you don't think they will be able to achieve additional 400 cfm but they will achieve 25% reduction, do still choose the 400 cfm reduction as we have the logic in place that if the cfm is reduced by 25% it will qualify.
  - "If Applicable" – For the Completion Bonus, Air sealing if applicable is defined as a CFM50 value less than 0.5 CFM50/sqft of floor area including basement.
- **Old Completion and Comfort bonus rewards** – the old Completion and Comfort bonus rewards will not be accepted after 12/31/2010
- **Exhaust Fans** – Always use actual model numbers for fans. Do not use xxxxxxxx or series name like Whisper Quiet. In order to pay out the rewards, we need to verify the model number on the ENERGY STAR website and without the model number we cannot verify it.
- **Reward amount to be submitted** – All of the measures that you have committed to be submitted will appear in light green color and below the measures you now see a total indicating Reward amount to be submitted. Once you submit the form the total will change back to \$0. If you want to confirm/check the total reward amount that you submitted for you can preview the Customer Reward Form and it will show you the total dollar amount.
- **Payment Information** – When selecting the Pay to customer, please make sure that this is the customer whose name should be on the check. If there are two customers listed on the project and either one can receive the check, please select both of them (e.g. John or Mary Smith).
- **Notes section** – You can add any additional notes in the Notes section below the payment info and these will appear on the Customer Reward Form.
- **Different Consultant** – If a different consultant started the project and you are finishing it up for them, please submit the Customer Reward Form using the paper forms (can be found on the Homes Partner's page) or contact Us to have the customer added to your list of customers.

## Provider Reward Form

- If you have any issues completing the Provider Reward Form rewards, please contact us.
- If your customer had at least one paid measure, you and the ally would be eligible for any of the Provider Rewards that you would normally receive.
- If your customer did not have any paid measures, you and the ally would not be eligible for any of the Provider Rewards.

## Project Status Report

- **Customer Search** – You now have the option to search within a specific date range for projects, as well as by Rating # and Project ID #

## WPS Bonus Rewards Eligibility Clarification

Due to recent questions received from the field regarding which rewards specifically qualify for the WPS Bonus Rewards, we are providing additional clarification.

1. Homes must receive natural gas service from WPS to be eligible for Bonus Rewards on measures that save natural gas. Homes must receive electric service from WPS to be eligible for Bonus Rewards on measures that save electricity.
2. Qualifying customers must complete any three of these recommended measures:
  - Building Shell measures (such as insulation or air sealing)
  - Flue closure with new furnace or boiler (combustion safety)
  - Flue closure with new power-vented water heater (combustion safety)

Replacing a power-vented water heater with a new or higher efficiency power-vented water heater is not a combustion safety issue (nor is replacing a furnace or boiler).

3. The three measures must be completed within six months of the initial assessment to be eligible for WPS Bonus Rewards. Total Rewards cannot exceed installed cost and/or \$3,000 per household.
4. WPS Bonus will be populated on the Preliminary Evaluation Report for customers in the WPS territory. Please make sure to let the customer know that the bonus will only be applied if the specific WPS bonus criteria are met (see above).

## Questions or Issues

Please contact:

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If you have any questions or if you are experiencing any error messages on your screen, please let us know as soon as possible. With error messages, it is ideal to have a screenshot of the error message so that we can investigate it further and any other specifics that may help such as what browser you are using and what you were trying to do. We will do our best to respond and resolve the issue in a timely manner. To take a screenshot of the error message, click once with your mouse anywhere on the screen with the error, and then on your keyboard press Ctrl and Print Screen at the same time. Then to paste this image into an email, click Ctrl V in the body of the email and this will paste the screenshot.