

Step by step instructions for completing the HP forms online.

Browser: Internet Explorer is the best option. We've discovered that other browsers have been limiting the search options for customer names as well as Contractor due to some auto fill functions (Firefox was auto-filling previously typed in name and did not allow you to choose from the list pulling data from our database. Our IT has addressed the Firefox issue programmatically so this should not be happening going forward.)

I. Log in using your username and password

II. Adding a New Customer

Prior to adding a new customer it is best to search for the customer first in the Customers screen (please see III. Finding an Existing Customer)

If Customer already exists you may receive a message letting you know this. The customer may have been entered under a different program (Renewables, HVAC, Info Center or other). You will not be able to add this customer. Please contact WECC and we'll add the appropriate Assessment/Rating project in the existing customer record and then you will be able to add the recommendations.

- A. Click on Add New Customer
- B. Complete all required fields (designated with *). Complete any other fields if you have the information
 1. Select Customer Type. Residential means individually owned; Business means business owned
 - If the customer is a Business, such as a church or a non-profit organization (for any Affordable Housing projects it will ALWAYS be a business), you MUST use the Business Customer Type
 - When using Business as the Customer Type, you must include FEIN # (Federal Tax ID #).
 2. Add customer's first and last name (if another person owns this home, add them separately under 2nd first and 2nd last name). You can only enter two individuals' names
 3. Select Address Type – Primary address is the address where the evaluation is being done. Mail Address is where the incentive check should be sent to. If both are the same, please use Primary address
 4. If this is a PO Box address, check the PO Box. Complete the information that appears
 5. For a regular address complete the fields as follows. **Do not use punctuation or spaces as shown below.** The * indicates required fields
 - a. *Street # (e.g., 123, N1231W123, S123)
 - b. Pre dir (e.g., N, E, NW etc.). This pre-directional is only for the street name, for example N Johnson or S 18th
 - c. *Street name (e.g., Johnson, 18th)
 - d. Street type (e.g., Ave, St, Ct) – this can be typed or selected from the drop down. **Do not add the Street type in the same space as Street name.**
 - e. Post dir (e.g., N, E, NW etc.). This post-directional is only for the street name, for example Johnson S or 18thS
 - f. Unit kind (e.g., Apt, Ste)
 - g. Unit # (e.g., 1, 2, A, B)
 - h. *City (e.g., Madison, St Croix). State defaults to WI.
 - i. *Zip Code (e.g., 55555)
 - j. County – auto completes based on Zip Code entered
 - k. Home phone #, Cell phone #, Work phone #, Ext, e-mail address if known
 - l. *Electric provider – can be selected from the drop down, or you can start typing it and when it appears select it from the dropdown list
 - m. Electric account # - if known
 - n. *Gas provider - can be selected from the drop down, or you can start typing it and when it appears select it from the dropdown list
 - o. Gas account # - if known
 - p. *Heating fuel type
 - q. *Water fuel type
 6. Click Save.
 - a. You will be brought to Customer Information screen.

- b. If you click on Edit you will be able to print a PER with all of the customer's information filled in. Scroll down to bottom of the page and click on Print Report with Customer Info.
- c. If you click on Projects you will be able to complete the PER and Add Recommendations. Please see III. Adding PER info.

III. Finding an Existing Customer

- A. Search Options
 - By Last Name or Address
 1. Type the Last Name or Address in the Search Box. Customers with similar or alike last names/addresses will show in the list.
 2. Choose the right customer. Click Select to go to that customer record.
 3. The customer list is organized alphabetically by last name so you may also find them by scrolling.
 - By Project # or Rating #
 1. Type the Rating # and click Apply Filter or
 2. Type the Project ID # and click Apply Filter
- B. Editing Address or Utilities
 1. Click on Edit. You will be able to edit the address, Opt Out information and utility information.
 2. If the customer agrees to grant Focus on Energy access to their energy consumption records, please uncheck the "Opt Out" box.
 3. If any changes have been made, click Save Address.
- C. If PER was submitted to WECC prior to 3/15/10:
 4. If you submitted a PER to WECC prior to 3/15/10, the customer information will be listed but there will not be any recommendations listed. The reason for this is, in the past we could not add any recommendations without the Checksheet of Recommended Measures which was normally not submitted until the Customer Reward Form.
 5. To complete the post test information:
 - i. Click on Customer Reward Form
 - ii. Add recommendations and installation information by clicking on Add Installation. Do this for any installed measures.
 - iii. When all installed measures have been added, proceed as specified under IV. Adding Post-Test information – Completing the Customer Reward Form item L. Attach documentation.

IV. Adding Preliminary Evaluation Report (PER) info

- A. Once you select the customer, it will bring you to the Customer Legal Information screen.
- B. Click on View Projects.
- C. Click Add New Project. (If a project already exists, do not enter a new project).
- D. Select if you're acting as Rater Consultant or Qualified Contractor and the company you represent.
- E. Complete all required fields designated with *
 1. Select Project Type (Assessment or Rating)
 2. Enter Date of Evaluation using dd/mm/yyyy format, or select the date from the Calendar icon by clicking on it
 3. Check Affordable Housing Project box if this is an Affordable Housing project
 4. Add Ally Referral if applicable.
 - a. Start typing the Ally's name and you will be able to see them in the list that appears.
 - b. If the ally is not in the list, you will not be able to select them.
 - c. For a current list of allies, please refer to the spreadsheet sent out beginning of the month.
 5. Add Rating ID # if applicable
 6. Add HERS Rating Score if applicable
 7. Add Infiltration
 8. Check any of the boxes under "Customer indicated the following concerns"
 9. Complete the Combustion Safety Report information by selecting Pass, Fail, N/A (please note that these are required * fields)

10. Add any other notes in the “We strongly recommend the following course of action(s)” section (up to 4 lines of text)
11. In the Notes section you may also add any other notes you want the customer or the processing staff to know.
12. Click Save Project. This will enable the Add Recommendations button which will appear below.
13. Click Add Recommendation
14. Select the measure from the Description drop down
15. Select the specifics for the measure from the Details drop down (if applicable)
 - a. Attic insulation – open floor is most common
 - b. Exhaust fan – ENERGY STAR is the \$50 measure, Other is the \$25 measure
 - c. Sidewall insulation – R3-R4 = ½ - ¾”; R5 or greater = 1” or more
16. Specify Priority #
17. List any preliminary values (e.g., cfm50 – 2000, pre R – 0)
18. List any recommended values (e.g., Recommended R – 25)
19. After adding all recommendations and when ready to submit the PER to WECC, click Submit Recommendations. This submits the PER to us electronically.
 - a. You have the option to preview and print the PER before submitting it to WECC so that you can give a copy of it to your customer if you print it at their home – or you can also email it to them as a pdf
20. After you submit the PER form you will see Customer Reward Form and Print Report buttons
 - a. Customer Reward Form allows you to complete the post test information and submit the Customer Reward Form to WECC
 - b. Print Report button allows you to print the PER (you can also print it as a pdf and email it to your customer)

V. Adding Post-Test information – Completing the Customer Reward Form

- D. Find your customer in the Customers screen (see section II. A Finding an Existing Customer)
- E. Click on View Projects
- F. PER submitted to WECC online will say Proposed in the Status column next to the project type.
 1. If it was not submitted, the Status will be blank. You will need to submit the PER before completing the Customer Reward Form
 2. If the Status says Proposed, you will see the Customer Reward Form button on the bottom of the page
 3. If you have not submitted the PER form or if it was submitted originally via paper, you will need to complete the PER online and submit it first; Save Project and then you can add just the recommendations that were installed. Submit form. (Please see the explanation behind this process section II. 4)
 4. You will see a Project ID # which you should add to any documentation that is sent to us.
- G. Click on Customer Reward Form – bottom of the screen
- H. Click on Edit next to the measure that was installed
- I. Complete all of the required * information
 1. *Status defaults to Committed (this means this measure has been installed). If you are trying to cancel a particular measure because it wasn’t installed, change the status to Cancelled.
 2. *Enter Installation Date in dd/mm/yyyy format or select the date from the Calendar icon
 3. Attachments required box should be checked only if you are going to be including an invoice for this measure. This will prompt you to attach the required document before you submit the form. If you have multiple measures pertaining to one invoice, check this box only once and attach that one invoice only once when you receive the prompt. If you are going to be faxing or emailing the attachments, do not check this box as it will not let you submit the form until you have attached a document.
 4. *Enter the Contractor – if you start typing the contractor name you will see a list of installing allies that start with the letters you typed. Choose the contractor from the list. This list is our most current installing ally list (we send a spreadsheet of all allies beginning of the month so you can

refer to it if you are not finding the ally in the drop down). If the contractor is a homeowner, type in Self and Self Install will appear as an option. If the contractor is not an installing ally, use Outside Agency.

5. *Enter Post-test value, sq ft insulated, model #, manufacturer #, qty as applicable
 - a. Always use actual model numbers. Do not use xxxxxxxx or series name like Whisper Quiet. In order to pay out the rewards, we need to verify the model number qualifies for the reward.
6. *Enter Installation Cost
 - a. If the invoice/receipt does not specifically say what the cost for individual measures is, please estimate it; **also note on the invoice/receipt what it is for** (e.g., attic insulation, sidewall insulation, etc.)
 - b. If the installation cost is lower than the reward amount, the reward amount will change to the installation cost. (If this is a WPS customer, if there is no Focus incentive paid out due to the cost, the WPS reward will also not be paid out. WPS reward is only paid out if the cost is higher than the Focus reward, and as long as other WPS required criteria are met.)
7. Click Save
- J. Continue with these steps for all other measures that were installed
- K. Add Installation button – if the customer had installed other measures that were not previously recommended, click on Add Installation button and proceed to complete all required * information.
- L. Customer Referral – if your customer referred another customer to the program you can also add a Customer Referral measure. Should a customer have more than 5 referrals, a second Customer Reward Form should be submitted.
 - a. Click on Add Installation
 - b. Select Referral from the Description drop down
 - c. Type in the project # or the the customer’s last name. Select the appropriate name from the list (the names will have their address listed also).
 - d. Click Validate. This feature verifies in our database that the referred customer has had an evaluation done.
 - e. Click Save.
- M. 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.

IMPORTANT – PLEASE READ CAREFULLY

- N. **Attach documentation (e.g., blg file, data collection sheet, invoices, etc.)**
 1. List of required documents is available in the upper right hand corner of the screen
 2. Rewards will not be processed if all of the required documents are not received
 3. If you can’t attach the required documents, please make sure to send them via fax (608-442-1833) or email (to ratings@weccusa.org) the same day with the Project ID # and customer’s name listed in the upper part of the document. If you will not have the required documents available the same day, do not submit the Customer Reward Form until all documents can be sent in the same day
- O. When you have updated all installed measures as Committed, click Submit Form button
- P. Enter Date of Post-test using dd/mm/yyyy or select the date from the Calendar icon
- Q. Select Payment Address and whose Attention the check should be made to
 - a. If you need to add a mailing address, click Alternate Address and add the mailing address information
- R. Check any applicable financing options
 - a. If your customer participated in the Reduced Interest Rate Financing through our EFS Program, you will need to check the Reduced Interest Rate Financing in the Customer Reward Form
 - b. All of the reward amounts will be zeroed out and the customer will instead receive the EFS Completion Bonus of \$250 (along with their reduced financing rate).
- S. Check the box if you have the Customer signature on file (we do not need the signature for our records)



- T. If you have not previously done so, attach any other documents/files
- U. In the Notes section you may add any specific notes that you want the processing staff to know (old rewards, other notes)
- V. Click Submit Form – this sends the Customer Reward Form along with all the attached documents and files to WECC; once the Customer Reward Form is submitted you will see Provider Reward Form button appear under Available Forms
 - a. Please note, if you attach any documents after you submit the CRF, we will not receive these until you submit the form again, so make sure to attach all documents PRIOR to submitting.
- W. You can print a copy of the Customer Reward Form for your records by choosing the date you submitted the form and clicking View/Print (or save it as a pdf and email it to the customer).

VI. Completing the Provider Reward Form

- A. Click the Provider Reward Form button – it appears under Available Forms after you submit the Customer Reward Form to WECC
- B. Click on Add Consultant/Contractor Reward
- C. Select a reward from the Description drop down
 - 1. For Facilitation, you will see multiple check boxes available appear. Check any that apply and the date of the Facilitation
 - 2. Click Save
- D. Add any other rewards that apply by selecting them from the Description and Details drop downs
- E. Ally Training measure
 - a. You have the option to add the Ally Training measure on the Provider Reward Form without the need to include the invoice.
 - b. If you prefer to get reimbursement at the time of the PER, please continue to include/send your invoice along with the PER (please make sure to write down the project # on the invoice).
- F. If applicable, start typing the Ally name under Ally Referral and then choose the appropriate ally from the list that appears
- G. Click Add Ally Reward, choose the reward from the Description and then Details drop downs
- H. Click Submit Form – this sends the Provider Reward Form to WECC
- I. Print Form button will appear – it will let you print a copy of the Provider Reward Form for your records

Some additional things that may help

If you are experiencing timing issues (where all of a sudden you are only seeing a gray screen with the timing circle), please try these:

- Try clicking Refresh (on IE browser it is this symbol  in the upper right corner of the screen; on Firefox Mozilla it is this symbol  in the upper left corner of the screen
- Try using a different browser (Internet Explorer or Firefox Mozilla)
- Update the version of the browser to a current version
- If java script is disabled you'll see a message on the very first page, in this case please enable java script
- Check for viruses, firewalls, pop up blocker