



NYSERDA
New York State Energy Research
and Development Authority

50 YEARS 1975-2025

Comfort Home Assessment Submission Guide



Presented By: Jason Barber – Field Supervisor

April 1st, 2026

NYHEP – HOME SCREEN

Global Enrollment Search

Can be used to quickly search for enrollment numbers, Customer names, addresses, etc.

Main Menu Tab

- Customers: Search for Customer Records, create a new Customer record
- Enrollments: Detailed search function, can sort by various criteria
- To-Do List: See a list of all enrollments associated with your NYHEP username



NYSERDA UA1 Site
NY Home Energy Portal

Global Enrollment Search

Search for enrollments...

Logout

Version 18.0 (EECP_NYS_UA01)

Main Menu

Reports

Security

Customers

Enrollments

To Do List

Announcements

Residential Energy Assessments, EmPower+, Appliance, Co...

Assigned to All Programs

This is just a test. with a bulleted list

- Bullet 1
- Bullet 2

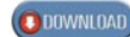
Indent, no bullet

no bullet, but lots of spaces **Bold** *Italics* Underline

[This is a LINK, opens in new window](#)

[Attachment Included](#)

Updated Date: 11/26/2024



Publications

Residential Energy Assessments, EmPower+, Appliance, Co...

test publication with attachment. assigned all Pro

This is just a test. with a bulleted list

- Bullet 1
- Bullet 2

Indent, no bullet

no bullet, but lots of spaces **Bold** *Italics* Underline

[This is a LINK, opens in new window](#)

[Attachment Included](#)

Updated Date: 11/26/2024



CREATING A CUSTOMER RECORD

The screenshot shows the 'Customer List' header with a 'New' button. Below it is a search bar with a 'Search Type' dropdown menu. The dropdown menu is open, showing options: 'General Search', 'Customer Name', 'Premise Address', 'Account Number', and 'Advanced Search'. The 'General Search' option is selected. To the right of the search bar are 'Go', 'Show Historical' (checked), and a help icon.

The screenshot shows the 'Customer Profile' form. The breadcrumb trail is 'Main Menu >> Customers >> Customer Profile'. On the left is a 'Customer Summary' sidebar with a table of navigation options: Customer Profile, Accounts, Premises, Service Points, Usage, Enrollments, Leads, Savings, Contacts, and Notes. The main form area has a 'Customer' header with 'Save', 'Delete', and 'Close' buttons. It contains two sections: 'Customer Attributes' with fields for 'Customer Number', 'Customer Name', and 'Customer Class' (set to 'Residential'), and 'Premise Address' with fields for 'Street', 'Unit', 'Street 2', 'Street 3', 'City', 'State', 'Zip', and 'County'.

Search for Existing Customer Record

- From the main menu tab on the NYHEP home screen, click **Customers** to bring up the Customer List.
- Before creating a new Customer record, perform a search for an existing Customer.
 - Searching for a utility account number will often bring up past Customer records associated with a spouse or other family member. Those accounts should be used if the utility account number is already associated with a NYHEP Customer record.
- If no existing Customer record is found, click **New** at the top left corner to create a new Customer record.

Creating a New Customer Record

- Fill in all information for your Customer.
 - It is recommended that the Customer who is named on the electric utility account also be the Customer in NYHEP.

CREATING A CUSTOMER RECORD – UTILITY ACCOUNT

Account Details

Electric Utility Account # <input type="text"/>	Service Provider (Click to Select) ▼	Account Status Active ▼
Account Class Residential ▼	Turn On Date 03/22/2026 📅	Occupancy Status (Click to Select) ▼
Account Name Sub Guide Customer		
Last Name Guide Customer	First Name Sub	
Home Phone <input type="text"/> Extension <input type="text"/>	Alternate Phone <input type="text"/> Alt Ext <input type="text"/>	
Cell Phone <input type="text"/>	Email <input type="text"/>	

Entering Utility Account Information

Input the Customer’s electric utility account number at the bottom of the Customer Profile page.



Remember to click Save!



Utility Company	Account # Length	POD ID	Form Requirement
New York State Electric and Gas Corporation (NYSEG)	11	15 characters long. Starts with "N01" for electric. Starts with "N02" for gas	POD # (required) Account # (required)
Rochester Gas and Electric Corporation (RG&E)	11	15 characters long. Starts with "R01" for electric. Starts with "R02" for gas	POD # (required) Account # (required)
Consolidated Edison of New York, Inc. (Con Ed)	11	N/A	Account # (required)
Central Hudson Gas and Electric Corporation	11	10 numeric digits	POD # (required) Account # (required)
Orange and Rockland (O&R)	11	N/A	Account # (required)
National Grid	10	N/A	Account # (required)

Eligible Customer Utility Providers

Customers are eligible to receive Comfort Home incentives if their utility provider is listed in the table to the left.

Municipal electric customers are eligible for assessments only – they are not eligible for package incentives.



CREATING A NEW ENROLLMENT

Once the Customer record is saved, the tabs to the left of the screen will turn blue. Click the **Enrollments** button to create a new Comfort Home enrollment for the Customer.



Main Menu >> Customers >> Customer Profile

Customer Summary
Customer Name
Sub Guide Customer
Customer Class
Residential

Customer Profile
Accounts
Premises
Service Points
Usage
Enrollments
Leads
Savings
Contacts
Notes

Customer
Save Delete Close

Customer Attributes
Customer Number: 999999000051348
Customer Name: Sub Guide Customer
Customer Type: (Click to Select)
Customer Class: Residential

Mailing Address
Attn:

 PO Box
 Street **Unit**
123 Test Ave
Street 2

Customer - Enrollment List

Close **New Enrollments**

Click "New Enrollments"

This will bring up the New Enrollment Wizard.

- Select "Comfort Home"
- Click "Next"

New Enrollment Wizard



This wizard will guide you through the process to create a new enrollment. Please select the program and click Next. You will then search for the appropriate customer account. Enter the search criteria and click Go. Once the account has been found, click on the search result and click Next. If the program allows, click Skip if an account number is not available. The enrollment will be created and you may add all necessary information.

Select a Program
(Click to Select)
Comfort Home
Residential Energy Assessments

Next Cancel

ENROLLMENT PROFILE

To open the enrollment that was created, click the  button

Customer - Enrollment List						
 Close  New Enrollments						
	Program	Status	Enrollment #	App Sig Date	Premise ID	Account #
	Comfort Home	Open	1058521	3/22/2026	999999000051348	197319789431236

To begin inputting Assessment details, click on [Assessment Started](#)

Main Menu >> Enrollments >> Enrollment >> Workflow

Enrollment Summary

Program
Comfort Home






Account #: [197319789431236](#)
Enrollment #: 1058521
Reference #: 1058521
Status: Open

Customer: Sub Guide Customer
Customer Class: Residential
Premise Id: 999999000051348
Service Provider: New York State Electric and Gas

Applicant
Guide Customer, Sub
123 Test Ave
Blossvale, NY 13308
Ph: (987) 456-7891

County: Oneida

Enrollment Profile - Workflow

 View Lead  Add Workflow  Cancel Enrollment  Close  Double Dip Report

Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date	Total # Days	WO
Enrollment						
Assessment Started	Sherri's Test Contractor	Open - New	3/22/2026			<input type="button" value="WO"/>




ASSESSMENT STARTED

Within the enrollment, fill out all required information.

** Denotes a required field

Review the Applicant Information tab for accuracy. Most of it will have migrated from your inputs under the Customer Record.

Before navigating to another tab, remember to click  Save to avoid data loss.

Main Menu >> Enrollments >> Enrollment >> Workflow >> Application

Workflow Step Summary

Program
Comfort Home

Account #: [197319789431236](#)
Enrollment #: 1058521
Reference #: 1058521
Status: New

Customer: Sub Guide Customer
Customer Class: Residential
Premise Id: 999999000051348

Applicant
Guide Customer, Sub
123 Test Ave
Blossvale, NY 13308
(987) 456-7891

County: Oneida
[Driving Directions](#)

Workflow Step Savings

kWh:	0.0000
Therms:	0.0000
MMBTu:	0.0000

Workflow Step Costs

Incentive:	\$0.00
Fee Cost:	\$0.00
Total Cost:	\$0.00

Assessment Started - Applicant Information - New

Process Save Close Expand All Collapse All Enrollment Profile Double Dip Report Update Customer

Processing Information

Community Hub - Trade Ally	Community Hub - Employee	Outcome Work Complete
-----------------------------------	---------------------------------	---------------------------------

General Application Information

Application Date 03/22/2026	Reference Number 1058521	Due Date
Installation Date <input type="text"/>		
Project Description <input type="text"/>	Total Project Cost \$0.00	

Project Description is Limited to 29 Characters

County Oneida	Weather Region Central	Westchester Eligible No
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Customer Information

Account Number
197319789431236

Account Name Sub Guide Customer	Email <input type="text"/>	
Primary Phone (987) 456-7891	Alt Phone <input type="text"/>	Fax <input type="text"/>

Owner Information

****Does the applicant own this site? Landlord Agreement Received?**


<input type="text" value="(Click to Select)"/>	<input type="text" value="(Click to Select)"/>
--	--



FUEL INFORMATION

** Fill in all required fields

When a Utility Provider/Supplier that utilizes POD numbers is selected, the POD number field becomes visible and required.

Before navigating to another tab, remember to click  Save to avoid data loss.

Assessment Started - Fuel Information - New

Save Close Expand All Collapse All

Utility Information		
**Electric Utility Provider New York State Electric and Gas	Electric Utility Account Number 197319789431236	**Electric Utility POD Number <input type="text"/>
Electric Rate \$0.20		
**Natural Gas Supplier (Click to Select)	**Primary Heating Fuel Account Number <input type="text"/>	
Gas Rate \$0.00		
**Primary Heating Fuel Type (Click to Select)	Secondary Heating Fuel Type (Click to Select)	

Delivered Fuel Information	
Delivered Fuel (Click to Select)	Delivered Fuel Supplier <input type="text"/>
Delivered Fuel Account Number <input type="text"/>	

Electrical System Information	
**Existing Electrical Panel Type (Click to Select)	**Electrical Panel Box Size (amps) (Click to Select)

- Applicant Information
- Fuel Information**
- Existing Conditions
- Partner Information
- Notes (0)
- Documents (0)
- Measures (6)
- Overrides
- Reports (0)
- Application History



EXISTING CONDITIONS – DWELLING INFORMATION

** Fill in all required fields

Dwelling Type

Use to indicate single family, multi-unit or manufactured home.

Number of Units in Building

If modeling a multi-unit building, input the number of units here.

Building Style

Choose closest style applicable.

Existing Basement Type

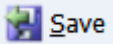
In cases where multiple foundation types exist, select the type that has the largest area.

Assessment Started - Existing Conditions - New

Save Close Expand All Collapse All

Dwelling Information

**Dwelling Type (Click to Select)	**Number of Units in Building <input type="text"/>
**Estimated Construction Era (Click to Select)	**Building Style (Click to Select)
**Stories Above Grade (Click to Select)	**Average Story Height (ft) <input type="text"/>
**Number of Bedrooms <input type="text"/>	**Total Conditioned Space (sq ft) <input type="text"/>
**Existing Basement Type (Click to Select)	**Basement/Crawlspace Square Footage <input type="text"/>
**Orientation Front of Home (Click to Select)	

Before navigating to another tab, remember to click  Save to avoid data loss.

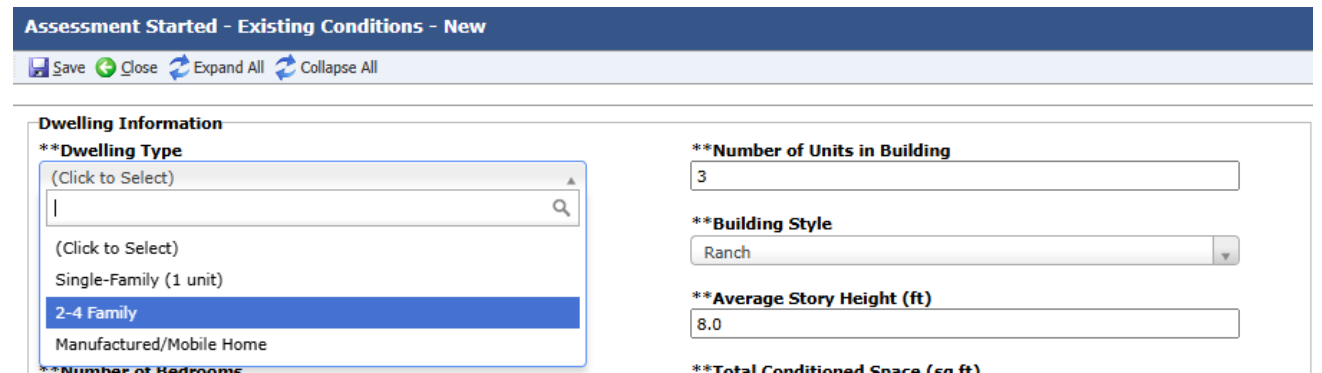


EXISTING CONDITIONS - MULTI-UNIT BUILDINGS

Multi-unit buildings that have separate space heating systems for each unit are eligible for separate Comfort Home incentives for each unit.

To model projects within multi-unit buildings:

- Each eligible unit should be entered as a separate project in NYHEP.
- Each unit/project will require a signed Customer Utility Release Form.
- The building does not need to be owner occupied.
- Each project should include details about the HVAC and water heating system associated with that unit.
- Each project should use the improved “areas” (insulation, air sealing, windows, etc.) associated with that unit.
- Each project should use the actual attic area over the unit.
- Each project should use the actual basement square footage and rim joist length for the portion under the unit.



The screenshot shows a software window titled "Assessment Started - Existing Conditions - New". Below the title bar are icons for Save, Close, Expand All, and Collapse All. The main content area is divided into two columns. The left column is titled "Dwelling Information" and contains a dropdown menu for "Dwelling Type" with options: "(Click to Select)", "Single-Family (1 unit)", "2-4 Family" (highlighted), and "Manufactured/Mobile Home". Below this is a partially visible "Number of Bedrooms" field. The right column contains fields for: "Number of Units in Building" (value: 3), "Building Style" (dropdown: Ranch), "Average Story Height (ft)" (value: 8.0), and "Total Conditioned Space (sq ft)".

- A second-floor unit should identify its basement/foundation as “conditioned.”
- A first-floor unit with a second-floor unit above it should list Existing Attic Floor R Value as 59, Attic Hatch or Stair Air Sealed? As “Yes” and Attic hatch Insulation R-Value as 59.
- Each project should use the conditioned floor area associated with that unit.
- Each project should use the actual floor square footage for foundation ceiling if insulating the basement ceiling for the unit.



EXISTING CONDITIONS – AIR INFILTRATION

Pre Work Blower Door Test Complete?


Assessment submissions that include blower door testing at the time of assessment are eligible for an additional \$100 incentive.

Post Work Estimated Air Leakage

Estimate the air leakage level you are targeting by selecting Leaky, Average or Tight from the dropdown.

- In a scenario where the actual pre-work blower door is lower than the NYHEP-generated CFM50, ensure that “Tight” is selected and leave a note on the enrollment.

Shell - Air Infiltration	
**Pre Work Blower Door Test Complete?	
<input type="text" value="(Click to Select)"/>	
Pre Work Blower Door CFM50	
0	
Pre Work ACH50	
0.0	
**Post Work Estimated Air Leakage	
<input type="text" value="(Click to Select)"/>	
Post Work Blower Door CFM50	Post Work ACH50
	0.0
Minimum Building Airflow (CFM50)	Mechanical Ventilation Required
1140	No

Before navigating to another tab, remember to click  Save to avoid data loss.



EXISTING CONDITIONS – NO BLOWER DOOR REASONS

Blower Door Testing Requirement

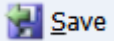
The contractor is required to measure pre-work blower door leakage rate (CFM50).

If a blower door is not performed, a geo-tagged photo of no blower door test reason will be required.

Blower Door Tests are not required in the following situations:

- When hazardous materials are present or suspected.
 - Geo-tagged photos must be taken of the hazardous material conditions.
- When the home has wall to wall drop down ceilings and a panel can't be moved.
 - If a panel or tile can be moved, the air pressure above and below the ceiling is equalized and the blower door test should be performed.
- An active fire is present in an atmospherically vented fireplace or wood stove.

Shell - Air Infiltration	
**Pre Work Blower Door Test Complete?	
<input type="text" value="No"/> (Click to Select)	
<input type="text" value="Yes"/>	
<input checked="" type="text" value="No"/>	
**Post Work Estimated Air Leakage	
<input type="text" value="Tight"/>	
Post Work Blower Door CFM50	Post Work ACH50
1300	8.1
Minimum Building Airflow (CFM50)	Mechanical Ventilation Required
1140	No

Before navigating to another tab, remember to click  Save to avoid data loss.



EXISTING CONDITIONS – AIR INFILTRATION – ACH TARGET

Comfort Home has an air infiltration target of 10 Air Changes per Hour at 50 Pascals (ACH50) or lower for 1-4 family homes and 12 ACH50 for manufactured homes.

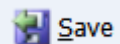
These target ACH levels were designed in coordination with the EmPower+ program to help make a home heat pump ready.

It is best practice to consider these at assessment submission and develop a workscope that will achieve the applicable target.

Shell - Air Infiltration	
**Pre Work Blower Door Test Complete?	**Pre Work Blower Door Test In CFM50 - Actual
Yes	2650
Pre Work Blower Door CFM50	
2650	
Pre Work ACH50	**Post Work Blower Door Test Complete?
16.5	No
**Post Work Estimated Air Leakage	
Tight	
Post Work Blower Door CFM50	Post Work ACH50
1300	8.1
Minimum Building Airflow (CFM50)	Mechanical Ventilation Required
1140	Maybe
**ACH Target Note	
House has board sheathing, all exterior walls insulated to capacity	

Note: ACH Target Note will be a required field at Installation Submission for any projects that do not meet the ACH target.



Before navigating to another tab, remember to click  Save to avoid data loss.


EXISTING CONDITIONS – CAZ TESTING

Per ANSI/BPI-1100 Home Energy Auditing Standard and industry best practices, audits and assessments should include evaluation of combustion, ventilation, moisture, make-up air, and electrical hazards (like knob and tube wiring).

Assessments completed for Comfort Home must include health and safety evaluations and appropriate entries made in NYHEP to document the existing condition of the home.

CAZ Testing

**Does the Venting Test pass? (Click to Select) ▼	**Does the Spillage Test(s) pass? (Click to Select) ▼
**Does the Gas Leak Detection Test pass? (Click to Select) ▼	**Does the Ambient CO Test pass? (Click to Select) ▼
**Does the Undiluted CO Test pass? (Click to Select) ▼	

Before navigating to another tab, remember to click  Save to avoid data loss.



EXISTING CONDITIONS – SHELL - INSULATION

Fill in all required fields as they exist at the time of assessment. Additional fields may appear based on specific inputs.

Existing Attic Type

- Only one attic can be modeled in NYHEP. In situations where more than one attic type, model the one that covers the most area.

Location of Existing Attic Insulation

- Ensure the input here aligns with what is listed under Existing Attic Type.

Example:

If the existing attic is “Vented Attic”, the Location of Existing Attic Insulation should be “Attic Floor”.


Meets Package B Requirements (Override)

- NYHEP is programmed with many of the program minimum requirements.

Example:

If exterior walls are insulated to capacity, but do not meet R14, this override is available.

Shell - Insulation	
**Existing Attic Type (Click to Select)	**Attic Hatch or Stair Air Sealed? (Click to Select)
**Attic hatch Insulation R-Value	**Location of Existing Attic Insulation (Click to Select)
**Attic Floor Area (sq ft)	
**Attic Gable Walls Area (sq. ft.)	
**Floor over outside/unheated space (Click to Select)	
**Location Of Existing Foundation Insulation (Click to Select)	Foundation_Crawlspace Ceilings SF Override
Total Area Foundation/Crawlspace Ceilings (sq ft) 1200	
**Existing R-Value - Fnd/Crawlspace Walls Insulation	
Rim_Band Insulation Level (Click to Select)	**Exterior Above Grade Walls (sq ft w/o windows)
**Exterior Walls - Insulation R-Value	**Wall Cavity Depth (Click to Select)
Meets Package B Requirements (override) (Click to Select)	

Before navigating to another tab, remember to click  Save to avoid data loss.





EXISTING CONDITIONS – SHELL - WINDOWS

Fill in all required fields as they exist at the time of assessment.

Note: If the home's window area is already at least 80% ENERGY STAR®, the home is NOT eligible for Package C incentives if any windows are replaced.

Shell - Windows	
**Existing Window Type <input type="text" value="(Click to Select)"/>	
**Area Front Facing ENERGY STAR Windows (sq ft) <input type="text"/>	**Area Back Facing ENERGY STAR Windows (sq ft) <input type="text"/>
**Area Left Facing ENERGY STAR Windows (sq ft) <input type="text"/>	**Area Right Facing ENERGY STAR Windows (sq ft) <input type="text"/>
**Area Front Facing Non-ENERGY STAR Windows (sq ft) <input type="text"/>	**Area Back Facing Non-ENERGY STAR Windows (sq ft) <input type="text"/>
**Area Left Facing Non-ENERGY STAR Windows (sq ft) <input type="text"/>	**Area Right Facing Non-ENERGY STAR Windows (sq ft) <input type="text"/>
**Area Existing Skylights - Enter 0 if none (sq ft) <input type="text"/>	
**Total Area of Exterior Doors (sq ft) <input type="text"/>	**Dominant Type of Exterior Door <input type="text" value="(Click to Select)"/>
Front Window Orientation 0	

Before navigating to another tab, remember to click  Save to avoid data loss. 

EXISTING CONDITIONS – HVAC, VENTILATION, WATER HEATING

** Fill in all required fields

Note: If continuous mechanical ventilation is required, it will need to be installed before an installation can be approved and package incentives are paid. This requirement will be based on the post-work blower door reading.


Photos showing the means of ventilation (pre-existing or installed) will need to be uploaded to NYHEP at Installation Submission.

HVAC - Primary Heating & Cooling	
**Heating System Primary (Click to Select) ▼	**Primary Heating System Install Year (Click to Select) ▼
**Primary Cooling System (Click to Select) ▼	**Primary Cooling System Install Year (Click to Select) ▼
**Thermostat Schedule (Click to Select) ▼	

Ventilation	
**Is there a Whole-House Ventilation System? (Click to Select) ▼	

WH- Water Heating	
**Hot Water Fuel Type (Click to Select) ▼	**Water Heater System (Existing) (Click to Select) ▼
**Water Heater Location (Click to Select) ▼	**DWH System Installation Year (Click to Select) ▼
**Water Heater Efficiency (UEF) <input type="text"/>	Low Flow Hot Water Fixtures True



Before navigating to another tab, remember to click  Save to avoid data loss.

PARTNER INFORMATION

** Fill in all required fields

Unless alternative agreements are reached with NYSERDA, Comfort Home assessments must be entered into NYHEP and submitted within 30 days of completion of the on-site assessment.

Late Submission Reason Field:

If the assessment date input is 30+ days in the past, a Late Submission Reason will be required.

Assessment Started - Partner Information - New

Save Close Expand All Collapse All

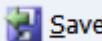
Auditor Information

****Assessment Date**

****Late Submission Reason**

Was Assessment Completed Remotely?
No

Applicant Information
Fuel Information
Existing Conditions
Partner Information
Notes (0)
Documents (0)
Measures (6)
Overrides
Reports (0)
Application History

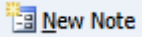
Before navigating to another tab, remember to click  Save to avoid data loss.



NOTES

Use the Notes tab in NYHEP to document things pertaining to the enrollment.

If a project is reviewed and returned you for revisions, a note indicating the need for revisions can be found here.

To leave a note, click  **New Note**
Type your note in the open field.

The options at the bottom of the notes pop-up should be left as “Users with access to this enrollment”.




When done, click  **Save** then  **Close** to return to the main Notes tab screen.


Assessment Started Workflow Step - Notes						
Date	Origin	Created By	Notes	Interaction?	Interaction Type	Interaction Reason
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

No records to display.

Workflow Step Note

Create New - Note

Note Date  **Note Time**

Notes

Who can view this note?

Users with access to this enrollment

Users with access to this workflow step

This is an Interaction



DOCUMENTS

Required Documents for all Comfort Home Assessment Submissions Include:

- NYSERDA Utility Release Form

Required as Applicable:

- NYSERDA Owner Services Agreement (required for projects commissioned by renters/tenants)
- Photo of no blower test reason
- Photo of the existing wall cavity if insulating
- Pre-work photos of the attic walls, if utilizing package B
- Photos of exterior of a multi-family building and any other areas that show multi-unit features

To upload a document, click



Assessment Started Workflow Step - Documents

New Close

Required?	Document Type(s)	Document Name	File Size	Comments	Create Date	Created By
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
!	Customer Release Form					
	Load Reduction Contract					
	Multi Unit Photo					
	Other attachments					
	Owner Permission Form (OPF)					

- Applicant Information
- Fuel Information
- Existing Conditions
- Partner Information
- Notes (0)
- Documents (0)**
- Measures (6)
- Overrides
- Reports (0)
- Application History

Upload Documents


Browse

Audit Pics (1).pdf Remove

Document Type(s)

Comments

Save Delete Close

Before navigating to another tab, remember to click  Save to avoid data loss.



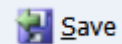

DOCUMENTS – UTILITY RELEASE FORM

The customer must complete and sign a Customer Utility Release Form for submission to NYSERDA by the contractor.

- The contractor must upload either a scanned signed copy of the form or a pdf with the customer’s digital signature.
- The form must be signed by the person whose name is on the utility account.
- The “customer” in NYHEP must be the same as the Customer Utility Release Form.
- After uploading the scanned copy, the paper form should be shredded or securely disposed of.

Projects completed without an accompanying Customer Utility Release Form are not eligible for incentives from NYSERDA.

Situation	Enrollment Requirements
Homeowner/Landlord are on utility bill	Customer record is homeowner/landlord name and account #
	Homeowner/Landlord would sign the URF
	Homeowner/Landlord would sign the Contract
	Even if the tenant pays the utility bill on behalf of the homeowner/landlord, the tenant would not be listed in the customer record, or on the URF
Tenant is on the utility bill.	Customer record is tenant name and account #
	Tenant would sign the URF
	Homeowner/landlord would sign the contract. A note needs to be included in NYHEP enrollment explaining the relationship between the two.
Homeowner/landlord is on the utility bill but tenant will pay for the work.	Customer record is homeowner/landlord name and account #.
	Homeowner/landlord would sign the URF.
	Tenant would sign the contract.
	Homeowner/landlord would sign the Building Owner Permission Form.

Before navigating to another tab, remember to click  Save to avoid data loss. 

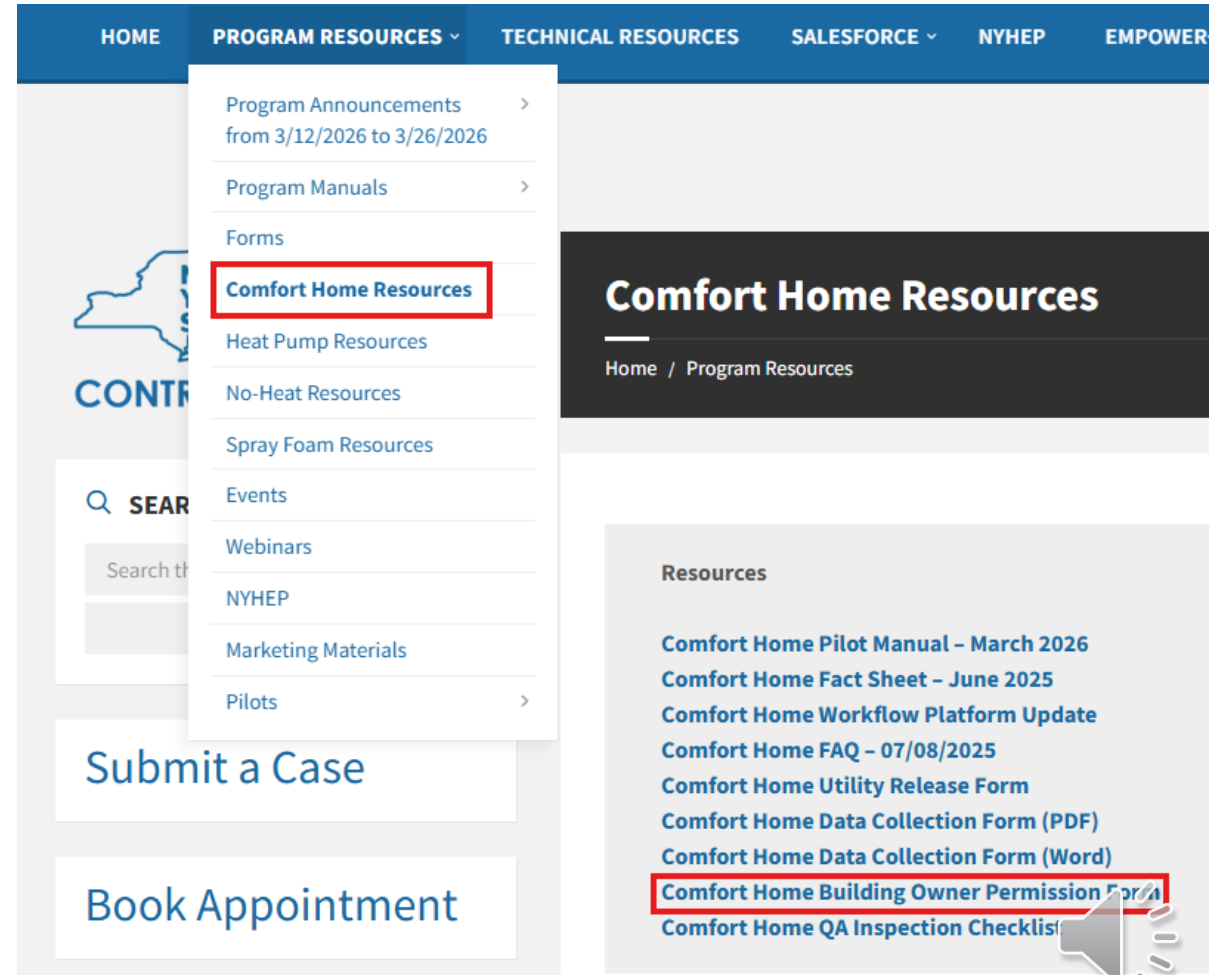
DOCUMENTS – MULTI-UNIT PROPERTIES

The Owner Services Agreement is required for projects within multi-family buildings, commissioned by renters/tenants

- The Contractor must upload either a scanned signed copy of the form or a pdf with the customer's digital signature.
- The form can be found on the Contractor Support Website

Projects commissioned by renters/tenants, completed without an accompanying Owner Services Agreement are not eligible for incentives from NYSERDA.

Additionally, photos must be submitted showing the layout of a multi-family building.



The screenshot displays the Contractor Support Website interface. The top navigation bar includes links for HOME, PROGRAM RESOURCES (selected), TECHNICAL RESOURCES, SALESFORCE, NYHEP, and EMPOWER. A dropdown menu under PROGRAM RESOURCES lists various categories, with 'Comfort Home Resources' highlighted in a red box. Below the navigation, a search bar is visible. The main content area features a dark header with the title 'Comfort Home Resources' and a breadcrumb trail 'Home / Program Resources'. A 'Resources' section lists several documents, with 'Comfort Home Building Owner Permission Form' highlighted in a red box. A speaker icon is located in the bottom right corner of the screenshot.

HOME PROGRAM RESOURCES TECHNICAL RESOURCES SALESFORCE NYHEP EMPOWER

Program Announcements from 3/12/2026 to 3/26/2026

Program Manuals

Forms

Comfort Home Resources

Heat Pump Resources

No-Heat Resources

Spray Foam Resources

Events

Webinars

NYHEP

Marketing Materials

Pilots

SEARCH

Search the

Submit a Case

Book Appointment

Resources

Comfort Home Pilot Manual – March 2026

Comfort Home Fact Sheet – June 2025

Comfort Home Workflow Platform Update

Comfort Home FAQ – 07/08/2025

Comfort Home Utility Release Form

Comfort Home Data Collection Form (PDF)

Comfort Home Data Collection Form (Word)

Comfort Home Building Owner Permission Form

Comfort Home QA Inspection Checklist

MEASURES

Fill in all required fields within each applicable measure, indicating your proposed improvements. Additional fields may appear based on specific inputs.

All measures should be included on each enrollment. Indicate whether a particular package has been selected, recommended or not completed within the measure.

Click into the fields to edit. Fields will appear under packages that are either selected or recommended.

Assessment Started - Measures - New

Save Calculate Savings Process Close Enrollment Profile Add Measures Double Dip Report

Enrollment Measures

#	▼	Measure Name	Measure			Measure Cost		Incentive		Savings				
			Unit	P Qty	I Qty	Unit Price	Amount	Unit Price	Amount	kWh	Therms	MMBTu		
1	▼	Package A - Attic & Air Sealing (PACK_A)	Per Home	1			\$0.00	\$0.00	0.0000	0.0000	0.0000			
2	▼	Package B - Walls & Floors (PACK_B)	Per Home	1			\$0.00	\$0.00	0.0000	0.0000	0.0000			
3	▼	Package C - Windows (PACK_C)	Per Home	1			\$0.00	\$0.00	0.0000	0.0000	0.0000			
4	▼	Incentive Calculation (CH_IC)	Each	1		\$0.00	\$0.00	\$0.00	\$0.00					
5	▼	Blower Door Test - Assessment (CH_BDT_AS)	Each				\$0.00	\$0.00						
6	▼	Contractors Assessment Fee (CH_FEE)	Each	1			\$0.00	\$0.00						
						Measure Cost	Incentive	kWh	Therms	MMBTu				
Grand Total						\$0.00	\$0.00	0.0000	0.0000	0.0000				

Enrollment Measures

#	▼	Measure Name	Measure			Measure Cost		Incentive		Savings				
			Unit	P Qty	I Qty	Unit Price	Amount	Unit Price	Amount	kWh	Therms	MMBTu		
1	^	Package A - Attic & Air Sealing (PACK_A)	Per Home	1			\$0.00	\$0.00	-11,430.9413	-672.3100	-67.2310			

Existing Conditions Meet Pkg A: No

**Installed State of Package A: Recommended ▼

Improved Blower Door CFM50_Pkg A: 1300

Post Work ACH50: 8.1

Existing Attic Type: Vented Attic

Existing Location Attic Insulation: Attic Floor

Location of Improved Attic Insulation: Attic Floor ▼

**Attic Thermal Boundary Change?: No ▼

Primary Attic Improvement Type: Insulate Attic Floor


Existing Attic Area (sq. ft.): 1200

Existing Attic Floor R Value: 19

**Area of Attic Floors Meets Requirements at Assessment: 0

Primary Attic Improved Area (sq. ft.): 1200

**Attic Floor Improved Insulation R-Value: 50

Before navigating to another tab, remember to click  Save to avoid data loss



MEASURES – OTHER INCENTIVES

Other funding that is being used to cover the cost of a particular package can be included under the “Other Incentives” field.

Package incentives are available UP TO the total cost of the package modeled, less any “Other Incentives” listed.

Click into the fields within the measure to edit. Fields will appear under packages that are either selected or recommended.

****Total Package A Cost: \$12,092.00**


Other Incentives: \$0.00

Assessment Started - Measures - New

Save Calculate Savings Process Close Enrollment Profile Add Measures Double Dip Report

#	▼	Measure Name	Measure			Measure Cost		Incentive		Savings				
			Unit	P Qty	I Qty	Unit Price	Amount	Unit Price	Amount	kWh	Therms	MMBTu		
1	▼	✗ Package A - Attic & Air Sealing (PACK_A)	Per Home	1			\$0.00	\$0.00	0.0000	0.0000	0.0000			
2	▼	✗ Package B - Walls & Floors (PACK_B)	Per Home	1			\$0.00	\$0.00	0.0000	0.0000	0.0000			
3	▼	✗ Package C - Windows (PACK_C)	Per Home	1			\$0.00	\$0.00	0.0000	0.0000	0.0000			
4	▼	✗ Incentive Calculation (CH_IC)	Each	1		\$0.00	\$0.00	\$0.00	\$0.00					
5	▼	✗ Blower Door Test - Assessment (CH_BDT_AS)	Each					\$0.00	\$0.00					
6	▼	✗ Contractors Assessment Fee (CH_FEE)	Each		1			\$0.00	\$0.00					
						Measure Cost	Incentive	kWh	Therms	MMBTu				
Grand Total						\$0.00	\$0.00	0.0000	0.0000	0.0000				



- Applicant Information
- Fuel Information
- Existing Conditions
- Partner Information
- Notes (0)
- Documents (0)
- Measures (6)**
- Overrides
- Reports (0)
- Application History

Before navigating to another tab, remember to click  Save to avoid data loss.




MEASURES – BLOWER DOOR FEE, ASSESSMENT FEE, DAC INCENTIVE

Assessment submissions are eligible for up to \$300 in incentives. For projects that include blower door testing at assessment, an additional \$100 incentive is available in addition to the standard \$200 assessment incentive.

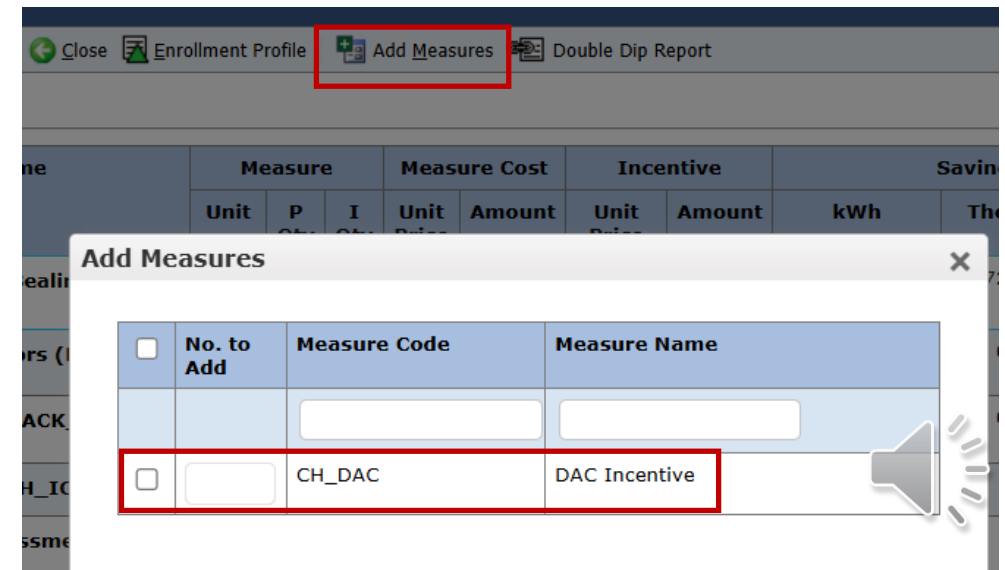
To indicate that a blower door test incentive is being submitted for, fill in the fields under the measure and change the  to 1, then click  Save .

Click into the fields to edit. Fields will appear under packages that are either selected or recommended.

An additional \$200 incentive will be paid for projects installed within a New York State designated Disadvantaged Community (DAC) on or after January 1, 2026. To submit for this incentive, the DAC measure must be added to the enrollment.

Before navigating to another tab, remember to click  Save to avoid data loss.

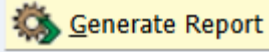
5	^	X	Blower Door Test - Assessment (CH_BDT_AS)	Each		1			\$100.00	\$100.00
Test In Date:				03/17/2026						
Blower Door Testing Notes:				2650						
6	^	X	Contractors Assessment Fee (CH_FEE)	Each		1			\$200.00	\$200.00
**Was an assessment for this home submitted and paid in Compass?:				No						
									Measure Cost	Incentive
Grand Total									\$0.00	\$300.00




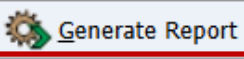
REPORTS

The Comfort Home Assessment Report is the initial report provided to the customer to show three optional standard package offerings and the cost benefit for air sealing and insulation.

Upon the initial virtual energy assessment or visit to the home, the participating contractor will enter required data for NYSERDA research into the Comfort Home platform and produce a Comfort Home Assessment Report to provide to the customer.

To generate the report, click  and select the Assessment Report from the dropdown. The report will then show in the table.

Workflow Step - Reports

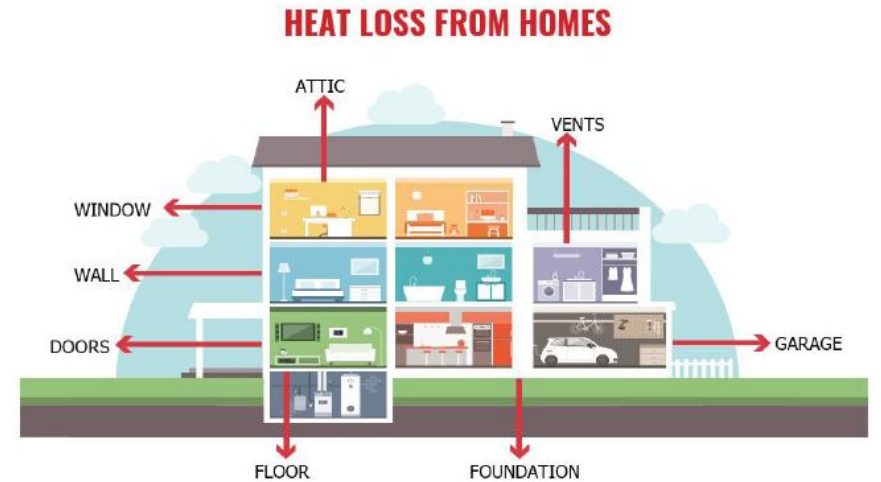
Name	Create Date	Created By
No records to display.		

Building Envelope

What It Is: Your home's "Building Envelope" separates the interior from the outside. Roofs, walls, windows, and doors are the main parts of a building envelope. The insulation levels in your home, the amount of air leakage, and the quality of windows and doors are important energy considerations. They determine the strength and quality of the building envelope. They also contribute to the comfort of your home.


Why It Matters: Air sealing and insulation are your home's primary way to stop heating and cooling loss. A sealing and insulation upgrade is usually first. That's because it is practical, cost-effective, and the difference can be felt immediately. The effectiveness of insulation is based on something called an "R-value." The higher the R-value, the better. A high R-value means slower heat loss/gain, lower energy bills, and a more comfortable home. The right amount of insulation is key to lowering your heating and cooling costs. Insulation increases the comfort of your home. The Environmental Protection Agency estimates that homeowners can save an average of 15% on heating and cooling costs (or an average of 11% on total energy costs) by air sealing their homes and adding insulation in attics, floors over crawl spaces and basements.

Windows are also part of your home's building envelope. Replacing old, drafty windows with ENERGY STAR® certified windows reduces drafts in the winter. These types of windows keep cool air inside during the summer and warm air inside during the winter and can help lower your energy bills.



Recommendations for your home:


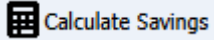
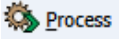
Category	Existing Condition	Existing Condition Rating	Recommendation
Attic Insulation	R-Value: 19	Needs Improvement	R-Value: 50
Attic Hatch Sealing and Insulation	No; R-Value: 0	Needs Improvement	- n/a -
Rim Joist Insulation	None	Needs Improvement	R-Value: 14
Wall Insulation	R-Value: 5	Needs Improvement	R-Value:
Floor Insulation	- n/a -	- n/a -	R-Value:
Windows	Single-Pane	Needs Improvement	- n/a -

Before navigating to another tab, remember to click  to avoid data loss.

CALCULATING SAVINGS AND SUBMITTING A COMPLETED ASSESSMENT

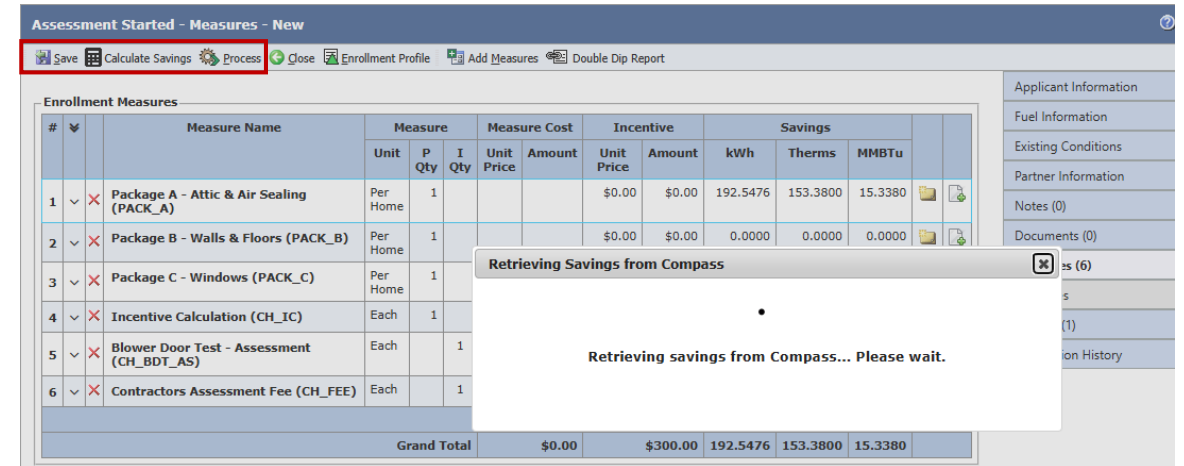
Prior to submitting a project for Assessment Review, the Contractor must calculate savings.

To Calculate Savings:

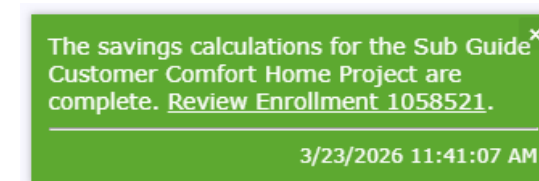
- Ensure all existing conditions and improvements are input accurately.
- From within the Measures tab, click  then click .
- Wait for the software to communicate with Compass.
 - Do not close or refresh your page during this step.
- After savings are calculated successfully, click  to submit the project for Assessment Review.

Review the savings calculations to ensure they are realistic prior to processing. If excessive savings generate, there may be a discrepancy within the existing conditions or measure inputs.

Note: Slight negative kWh savings (< 100kWh) may calculate on occasion and can be overlooked. If excessive negative savings are submitted, the project may be returned to you for revisions. Please contact Contractor Support if you can not identify the source of negative project savings.

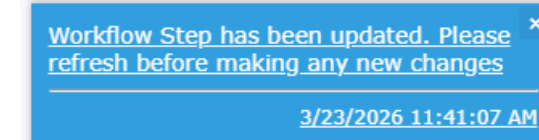


#	Measure Name	Measure			Measure Cost		Incentive		Savings		
		Unit	P Qty	I Qty	Unit Price	Amount	Unit Price	Amount	kWh	Therms	MMBTu
1	Package A - Attic & Air Sealing (PACK_A)	Per Home	1			\$0.00	\$0.00	192.5476	153.3800	15.3380	
2	Package B - Walls & Floors (PACK_B)	Per Home	1			\$0.00	\$0.00	0.0000	0.0000	0.0000	
3	Package C - Windows (PACK_C)	Per Home	1								
4	Incentive Calculation (CH_IC)	Each	1								
5	Blower Door Test - Assessment (CH_BDT_AS)	Each	1								
6	Contractors Assessment Fee (CH_FEE)	Each	1								
Grand Total						\$0.00	\$300.00	192.5476	153.3800	15.3380	



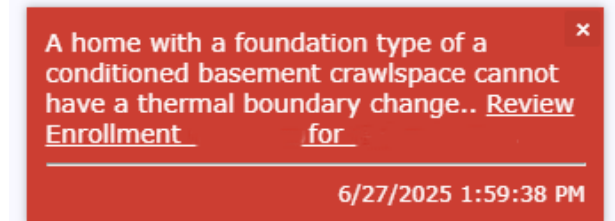
The savings calculations for the Sub Guide Customer Comfort Home Project are complete. Review Enrollment 1058521.

3/23/2026 11:41:07 AM



Workflow Step has been updated. Please refresh before making any new changes

3/23/2026 11:41:07 AM



A home with a foundation type of a conditioned basement crawlspace cannot have a thermal boundary change.. Review Enrollment for

6/27/2025 1:59:38 PM

Once savings calculations are complete, a green message will appear at the bottom right corner of your screen, indicating that the savings have been calculated successfully; If there is an error, a red box will appear. You will be unable to process the enrollment until the red error is addressed.

- If an error is given and you cannot identify the source, reach out to Contractor Support.

CONTRACTOR SUPPORT

The screenshot shows the Contractor Support website. The navigation menu includes PROGRAM RESOURCES, TECHNICAL RESOURCES, SALESFORCE, NYHEP, and EMPOWER. The left sidebar menu has items like Program Announcements, Program Manuals, Forms, Comfort Home Resources (highlighted with a red box), Heat Pump Resources, No-Heat Resources, Spray Foam Resources, Events, Webinars, NYHEP, Marketing Materials, and Pilots. The main content area is titled 'Comfort Home Resources' and lists various documents, with 'Comfort Home Pilot Manual - March 2026' highlighted with a red box.

The Comfort Home Program Manual, found on the [Contractor Support site](#) is the best reference for all Program requirements. It is recommended that you familiarize yourself with all aspects of the Program by reviewing this document regularly as Program requirements are subject to change.

The screenshot shows the 'The Contractor Support Online Scheduling Tool' interface. It features a 'Book an Appointment' button, a heading 'Booking for Comfort Home Program/Technical Support', and a calendar for March 2026. The date 'March 30' is selected. The calendar shows a grid of dates from 1 to 31, with the 30th highlighted. To the right of the calendar is a 'TIME' column with slots from 9:10 AM to 11:30 AM in 10-minute increments.

If you require one-on-one assistance, please schedule an online appointment. To do so, visit <https://hpwescontractorsupport.com/welcome-to-the-contractor-support-online-scheduling-tool/>