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# NYSERDA Portal User Guide for Participating Contractors

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NY Residential Existing Homes Programs  
Contractor Support: Case Management

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# Section 1: General

## 1.1 Purpose

The NYSERDA Portal User Guide for Participating Contractors is intended to provide instructions to contractors working in the NY Residential Existing Homes Programs regarding the use and functionality of the case system for contractor support and related issues.

Use of the system allows for (1) communication between the implementation team, the participating contractor, and NYSERDA to facilitate resolution of the case; (2) a central location to document the issue from start to finish; and (3) the ability for the program to monitor the volume of case types.

The case management portion of the NYSERDA Portal operates similarly to the legacy ticketing system used in Home Performance with ENERGY STAR<sup>®</sup>, ZenDesk, expanding its scope to include the EmPower New York program and other initiatives involving NY Residential Existing Homes Programs.

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## 1.2 Overall Design

The case management portion of the NYSERDA Portal works similarly to a help desk ticket system in that requests for assistance from contractors may be submitted, assigned to a team, and managed through a case. This allows for streamlined resolution management of contractor related questions or concerns and a centralized location for communications relating to the support request. All participating contractors are given access to the NYSERDA Portal, allowing them to log in and submit help requests.

Participating contractors can submit support requests in three primary ways: (1) call the contractor support phone line, 1-800-284-9069, and the phone support staff creates a case in the NYSERDA Portal to document the question or issue; (2) log in to the NYSERDA portal at <https://portal.nyserda.ny.gov/login> and create a new case, and (3) send an email to [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov) which auto-generates a case in the NYSERDA Portal.

As a reminder, all program partners, including participating contractors are required to treat customer information appropriately. Be mindful when submitting cases in the NYSERDA Portal to only include pertinent information and not include sensitive data such as social security number or bank account number. As general guidance:

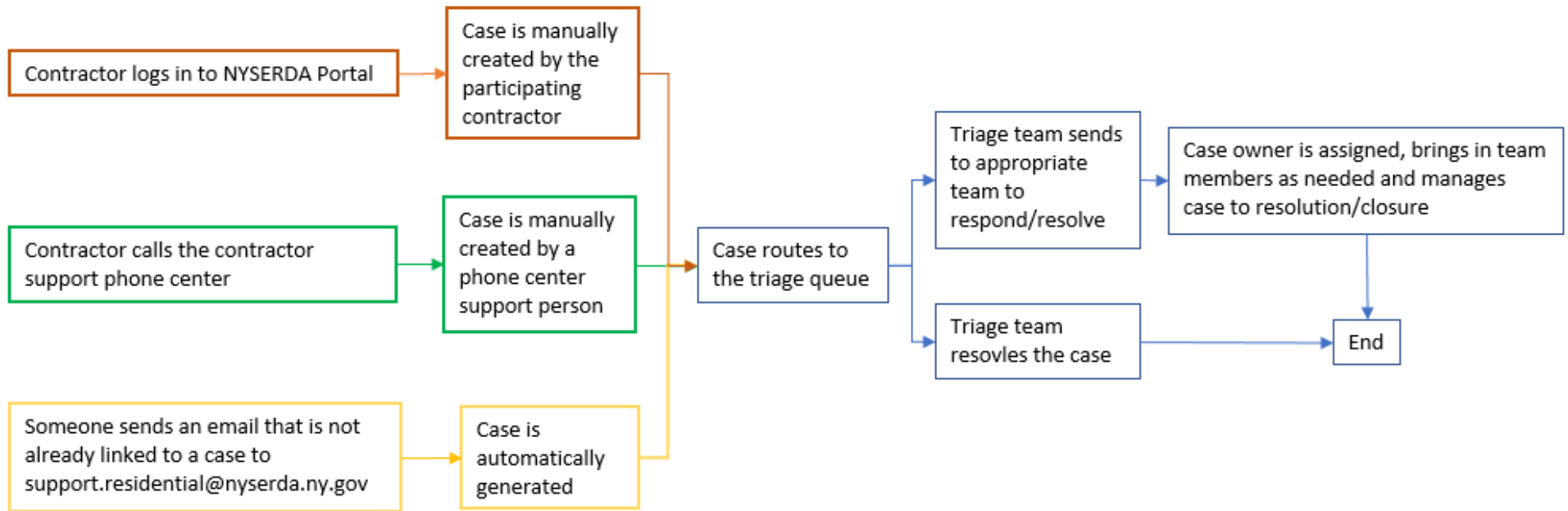
- A. If submitting a case by logging into the NYSERDA Portal: Name, address, phone number and utility account name are acceptable.
- B. If submitting a case by sending an email through [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov) : Customer information should be limited to only that which is needed to find the projects in program systems. Preferred identifiers when available include; Portal ID, GJGNY Audit Reservation #, or other project ID numbers.

All cases are reviewed by a triage team. The triage team either addresses the contractor support request or routes the request to the appropriate program team for resolution management (e.g., technical services, shared services, finance,

etc.). A person from the appropriate program team is then assigned as the Case Owner. The Case Owner manages the case to ensure it progresses toward resolution.

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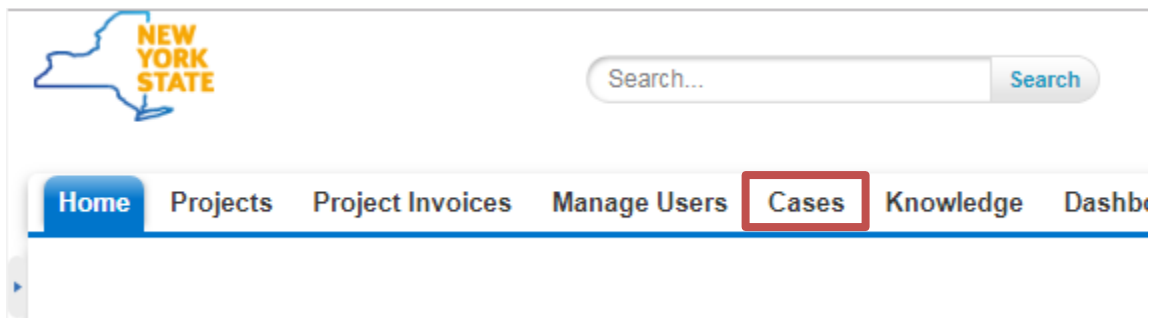
## 1.2.1 High-Level Process Map



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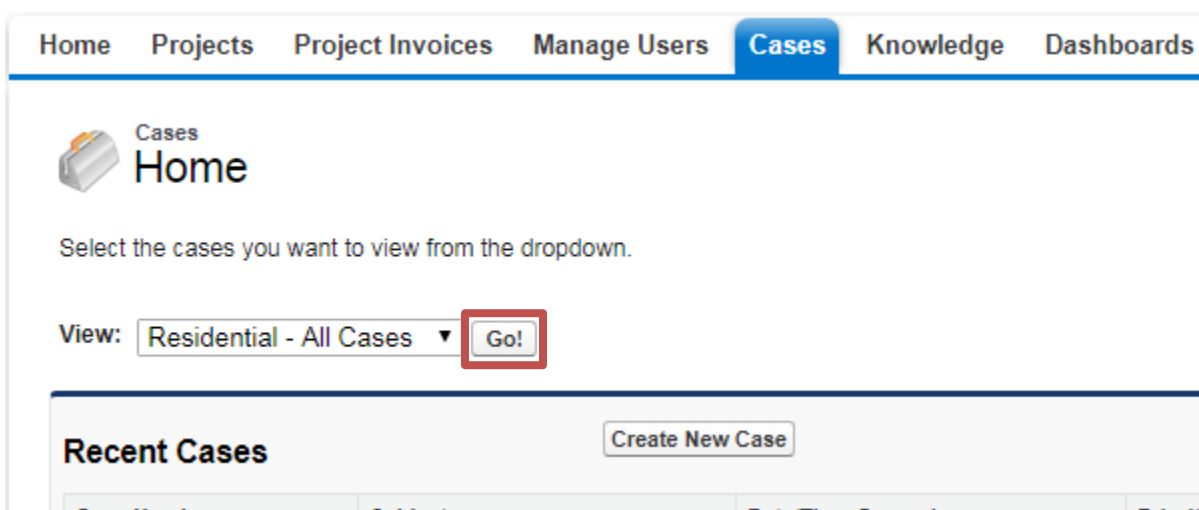
## 1.3 Quick Start

1. Log in to the NYSERDA Portal: <https://portal.nyserda.ny.gov/login>
2. Click on the Cases tab to navigate to the Cases Home page



To see all your cases:

1. From View: field dropdown, select Residential – All Cases
2. Click the Go! button



To create a new case:

1. Click on the Create New Case Button to go to New Case/Select Case Record Type page
2. From the Record Type in the new record field dropdown, select one of the three applicable options:
  - a. Residential – General Program Questions
  - b. Residential – Project Specific Questions
  - c. Residential – Project/Customer Concern
3. Click the Continue button to go to the Case Edit/New Case Page.
4. Populate as many fields as possible.
5. Provide a full description of the support request in the Description field.
6. Click the Submit button.

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## 1.4 Definitions

The Definitions section is intended to give guidance and familiarity with terminology used in and in reference to the NYSERDA Portal case management system for the NY Residential Existing Homes Programs. The general definitions section defines terms that are used across the system and in various types of cases.

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### 1.4.1 Program Definitions

1. **Implementation Contractors:** Entities that have entered into agreements with NYSERDA to help manage all or portions of a program under NYSERDA's guidance and direction (e.g., Technical Services, Shared Services, etc.).
2. **NY Residential Existing Homes Programs:** A NYSERDA program that offers incentives to install energy efficiency improvements to occupants of one to four-unit existing homes and includes the following: Home Performance with ENERGY STAR (HPwES), Assisted Home Performance with ENERGY STAR (AHPwES), EmPower New York (EmPower), and Residential Financing. The list of programs may expand with future initiatives as the program evolves.
3. **Participation Agreement:** An agreement between NYSERDA and a contractor allowing that contractor to participate in the program provided terms and conditions set forth by the agreement are met.
4. **Participating Contractor:** A contractor who has been accepted by NYSERDA into the program and has signed a Participation Agreement.
5. **Program Staff:** NYSERDA staff and contracted implementation teams working in the NY Residential Existing Homes Programs.

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### 1.4.2 General Definitions

1. **Account:** A record documenting the details associated with a company in the NYSERDA Portal. Contacts and users are grouped together by their associated account. Each participating contractor has his or her own account in the NYSERDA Portal.
2. **Account Administrator (Admin):** The designated person from a company with permissions to add/remove user access to the company's cases in the NYSERDA Portal.
3. **Account Name:** The company name associated with the requester.
4. **Account Primary:** The designated person from a company that is the default contact to receive email communication from a case. NYSERDA recommends that participating contractors establish a centralized email box for this purpose.
5. **Attachments:** Relevant documents (e.g., pictures) that have been uploaded to the case.
6. **Case:** The mechanism used to communicate, track, and resolve questions, issues, or concerns. It is the primary tool for participating contractors to request assistance from the program, ask questions, and resolve customer concerns.
7. **Case Comments:** Notes regarding status, details, or other notes.
8. **Case Number:** A system-generated unique identifier that is assigned to all cases.



9. **Case Origin:** A one-word description of the means used to initiate the assistance request (e.g., web, phone, etc.).
10. **Case Owner:** The person responsible for overall monitoring and managing of a case to ensure progress and resolution/closure.
11. **Case Record Type:** The first level of classification of a case and general indicator of the type of case being submitted.
12. **Contact Name:** The person requesting assistance, who could be someone from a participating contractor, customer, NYSERDA, implementation team, etc.
13. **Contractor Account Name:** The name of the participating contractor associated with the case.
14. **Created By:** A field documenting the person who created the case and includes a date/time stamp.
15. **Customer Name:** The person receiving services through one of the programs.
16. **Description:** A detailed explanation of the assistance requested in the case.
17. **EmPower ID Number:** A unique identifier assigned to a project when it is entered into the EmPower New York database. This database and ID number has been retired and is only used for older projects. EmPower projects have transitioned into the New York Home Performance Portal (NY HP Portal) and will be assigned portal ID numbers moving forward.
18. **Feed:** Detailed description of events in chronological sequence that have taken place concerning the case.
19. **GJGNY Reservation Number:** The unique identifier assigned to a customer when signing up for a free or reduced rate energy audit.
20. **Knowledge:** A searchable area of the NYSERDA Portal where self-help articles are posted regarding the program and the system.
21. **Last Modified By:** The person that last modified the case with a date/time stamp.
22. **List View:** A customized list of records based on predefined criteria (e.g., Recent Case list shows all cases that the user has recently viewed).
23. **Modeling Software:** The software used by the participating contractor to calculate energy savings and savings-to-investment ratios.
24. **NY HP Portal:** The system used by the program to manage applications, work scope development, and approvals as well as project completions in the NY Residential Existing Homes Programs.
25. **Portal ID Number:** The unique identifier assigned to a project when the project is entered in the NY HP Portal.
26. **Priority:** Indicates the level of urgency required for a case and helps the case owner manage caseloads.
27. **Project Completion Date:** The day the program has received all completion paperwork and closed the project in the NY HP Portal.
28. **Project ID Number:** A unique identifier assigned to a project when it was entered into HUB. HUB has been retired; therefore, this number only applies to older projects. All new projects are issued a portal ID.
29. **Project/Premise Address:** The physical location of the project receiving service.
30. **Queue:** A grouping of cases that have been routed to a specific team for resolution management.
31. **Request Type:** The second level of classification for a case. Setting the appropriate Request Type assists in triage and reporting.
32. **Status:** The status of the case (e.g., open, on-hold, etc.)
33. **Subject:** A brief sentence that describes the assistance requested in the case.
34. **Task:** An action relating to a case that needs to be accomplished and can be assigned to a case team member or participating contractor.
35. **User:** An individual with login credentials and access to the NYSERDA Portal.
36. **View:** A list of available list views.

## Section 2: Logging In

Participating contractors log in to the NYSEDA Portal from the portal login page: <https://portal.nyserda.ny.gov/login>

At the portal login page, contractors populate their user name and password, and click the Log In button.



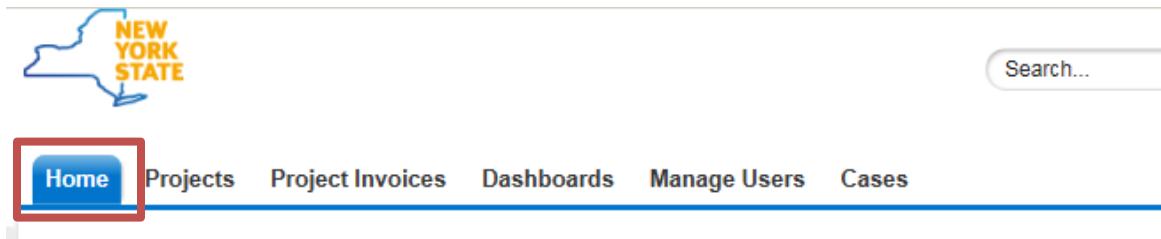
Username

Password

**Log In**

[Forgot Your Password?](#) [Sign Up](#)

Logging in takes contractors to their home page in the NYSEDA Portal.



## Section 3: Passwords

When a user profile is created in the NYSERDA Portal, the user receives an email with a link to create an initial password. Once this password is set up, the user has access to the portal. The email received is similar to the following example.

From: [noreply@salesforce.com](mailto:noreply@salesforce.com) [mailto:[noreply@salesforce.com](mailto:noreply@salesforce.com)] On Behalf Of NYSERDA Portal  
Sent: Tuesday, January 09, 2018 1:54 PM  
To: Houle, Matthew E (NYSERDA) <[Matthew.Houle@nyserda.ny.gov](mailto:Matthew.Houle@nyserda.ny.gov)>  
Subject: Sandbox: Password Reset – NYSERDA Salesforce Portal  
Importance: High

ATTENTION: This email came from an external source. Do not open attachments or click on links from unknown senders or unexpected emails.

Hi Matt,

Your Salesforce password has been reset for the NYSERDA Salesforce Portal for your username: [matthew.houle@nyserda.ny.gov](mailto:matthew.houle@nyserda.ny.gov)

To create a new password, visit: [https://uat-nyserda-portal.cs33.force.com/secur/forgotpassword.jsp?r=CAAAAWDhbG\\_rME8wMzUwMDAwMDA0QzIcAAAAQvSOQ1T8Poc0gMOTNFKR2TqHdrGareKpMcd7agI9LmA97ItWKipJO16PIUzyvcJT8j0xFg8O2Pc0uvLc0FhHCE37aXcDan9mUtPaYWEqOlj2OliU9mYVu-pT1QooP3i3A%3D%3D&display=page&fpot=1a275545-b6d2-472e-94f6-e60d2c3826a3a70145b9-4402-4032-a51f-0aad5d0960ac](https://uat-nyserda-portal.cs33.force.com/secur/forgotpassword.jsp?r=CAAAAWDhbG_rME8wMzUwMDAwMDA0QzIcAAAAQvSOQ1T8Poc0gMOTNFKR2TqHdrGareKpMcd7agI9LmA97ItWKipJO16PIUzyvcJT8j0xFg8O2Pc0uvLc0FhHCE37aXcDan9mUtPaYWEqOlj2OliU9mYVu-pT1QooP3i3A%3D%3D&display=page&fpot=1a275545-b6d2-472e-94f6-e60d2c3826a3a70145b9-4402-4032-a51f-0aad5d0960ac)

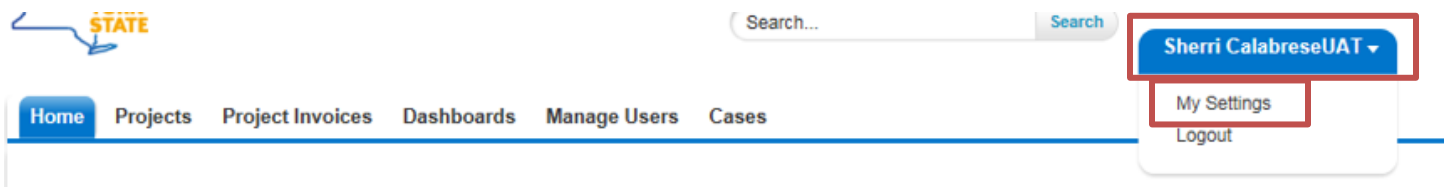
Please contact [SalesforceSupport@nyserda.ny.gov](mailto:SalesforceSupport@nyserda.ny.gov) if you have trouble logging in.

Thanks,  
NYSERDA

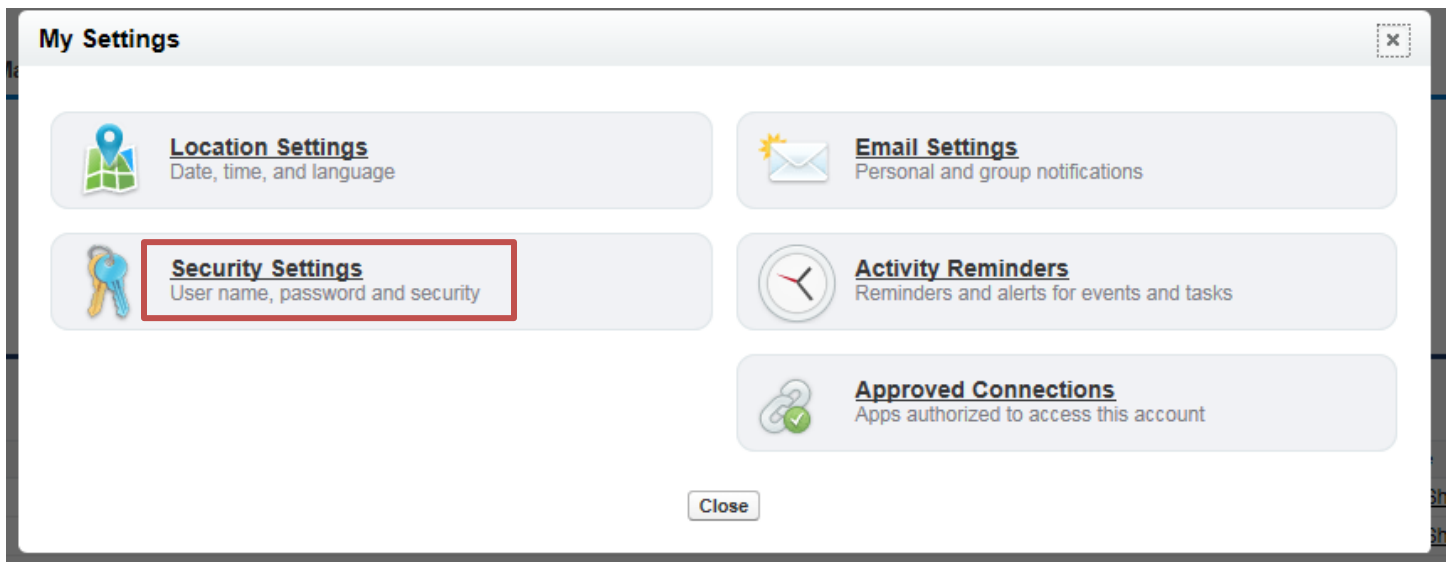
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### 3.1 Updating a Password while Logged in

To update a password while logged in to the NYSERDA Portal, click on the user name in the upper right corner, and click on the My Settings option.



Clicking the My Settings option opens the My Settings page. Select the Security Settings link.



The Security Settings link opens the Security Settings page. Enter the new password information as instructed.

A screenshot of the 'Security Settings' page. The page title is 'Security Settings'. Below the title is a form with the following fields: 'User Name' with the value 'sherri.calabrese@nyserda.ny.gov.resuat' and a 'Change User Name' link; 'Current Password' with an empty password field; 'New Password' with an empty password field and an information icon; and 'Verify New Password' with an empty password field. Below the form, it says 'Your password was last changed or reset on 8/16/2017 3:25 PM'. At the bottom of the form are 'Save' and 'Cancel' buttons.

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## 3.2 Forgotten Password

To change a password without first logging in to the system, open the login page, and click on the Forgot Your Password? link.



Username

Password

Log In

[Forgot Your Password?](#) [Sign Up](#)

From the [Forgot Your Password?](#) link follow the page instructions to reset your password.

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## Section 4: Managing Users

Each participating contractor is set up in the NYSERDA Portal with an account, and each account has one person designated as the administrator and one as the primary. The administrator has access to add or deactivate company employee login information, controlling who has access to the portal. The primary on the account is the default contact from the contractor's company who receives email communication. Participating contractors are encouraged to use a central inbox as their primary contact.

Information accessible to a participating contractor is dependent on permissions that are determined and provided by NYSERDA. Participating contractors have access only to components pertinent to their business in the NYSERDA Portal. They are not able to view information associated with other contractors.

Some participating contractors may operate in multiple NYSERDA program areas within NYSERDA Portal components. Any user with login credentials associated with a participating contractor can access information for all program areas related with that account. For example, if contractor A participates in NY-Sun and the NY Residential Existing Homes Programs, and the administrator sets up a login for employee B, employee B will also have access to the information in both program areas. Likewise, if the company deactivates a user from its account, the user, in this case employee B, is removed from both NY-Sun and the NY Residential Existing Homes Programs, making the employee unable to access any components associated with the company.

When a new contractor has signed the participation agreement for the NY Residential Existing Homes Programs and has been accepted into the program by NYSERDA, an onboarding process is conducted that includes setting up an account in the NYSERDA Portal with an administrator and a primary.

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## 4.1 Adding Users to an Account

The administrator on a participating contractor’s account adds new users to the account by navigating to the Manage Users tab of the NYSERDA Portal and clicking the Add a New User link.

**Note:** Only administrators have access to the Manager Users tab. If the user cannot access the tab, the user is not an administrator on the account.

YONK STATE

Search... Search Sherri CalabreseUAT

Home Projects Project Invoices Dashboards **Manage Users** Cases

### Users

**+ ADD A NEW USER**

First Name	Last Name	Email	Username	User Since	Status	Action
Sherri	CalabreseUAT	sherri.calabrese@nyserda.ny.gov	sherri.calabrese@nyserda.ny.gov.resuat	October 17, 2017	Active	<a href="#">Edit</a>

From the Add a New User page, the administrator adds the new user’s first and last names and email address. There is also the option of checking or unchecking the Admin box. If the Admin checkbox is checked, the new user is provided administrator rights on the account as a secondary administrator.

ADD A NEW USER



Please select an existing contact to create new user

**Info:** There are no existing contacts available to enable as a user.

OR

Please enter new user information:

First Name	<input type="text"/>
Last Name	<input type="text"/>
Email	<input type="text"/>
Admin	<input type="checkbox"/>

CLOSE

SAVE CHANGES

Clicking the Save Changes button adds the user to the account. The new user receives an email from the system asking the user to log in and create a password. The email received is similar to the following example.



**ATTENTION:** This email came from an external source. Do not open attachments or click on links unless you are expecting this message.

Hi Sherri Calabrese,

Welcome to the NYSERDA application portal! Your account has been created.

Your username is: [sherri.calabrese@nyserda.ny.gov.uat](mailto:sherri.calabrese@nyserda.ny.gov.uat)

To get started, create a password at <https://uat-nyserda-portal.cs33.force.com>

Please contact Ryan Deep at [SalesforceSupport@nyserda.ny.gov](mailto:SalesforceSupport@nyserda.ny.gov) if you have trouble logging in.

Thank You,  
NYSERDA

## 4.2 Deactivating Users from an Account

The administrator on a participating contractor’s account deactivates existing users by navigating to the Manage Users section of the NYSERDA Portal and clicking the Edit link associated with the user's name.

**Note:** Only administrators have access to the Manager Users tab. If the user cannot access the tab, the user is not an administrator on the account.

YORK STATE

Search... Search

Sherri CalabreseUAT

Home Projects Project Invoices Dashboards **Manage Users** Cases

### Users

+ ADD A NEW USER

First Name	Last Name	Email	Username	User Since	Status	Action
Elizabeth	Lazarou	elizabeth.lazarou@nyserda.ny.gov	elizabeth.lazarou@nyserda.ny.gov.nyserda	October 30, 2017	Active	<a href="#">Edit</a>
Matt	Houle	matthew.houle@nyserda.ny.gov	matthew.houle@nyserda.ny.gov.nyserda	October 30, 2017	Active	<a href="#">Edit</a>
Sherri	CalabreseUAT	sherri.calabrese@nyserda.ny.gov	sherri.calabrese@nyserda.ny.gov.resuat	October 17, 2017	Active	<a href="#">Edit</a>

From the Edit User page, the administrator unchecks the Active checkbox and clicks the Save Changes button. Unchecking the Active checkbox deactivates the user from the account.

ADD A NEW USER

Please select an existing contact to create new user

Info: There are no existing contacts available to enable as a user.

OR

Please enter new user information:

First Name

Last Name

Email

Admin

CLOSE SAVE CHANGES

To reactivate a user, navigate to the Manager Users section of the NYSERDA Portal, click on the Edit link, recheck the Active checkbox, and click the Save Changes button.



### 4.3 Changing the Administrator on an Account

The administrator on a participating contractor’s account adds or deactivates users as well as assigns other employees administrative rights, which allow those users to also add or deactivate users on the account. The administrator has two options for adding a secondary administrator:

1. Create a new user with the Add a New User link (see Section 2.1: [Adding Users to an Account](#)).
2. Edit an existing user with the Edit link.

The screenshot shows the 'Manage Users' page with a navigation bar at the top containing 'Home', 'Projects', 'Project Invoices', 'Dashboards', 'Manage Users', and 'Cases'. Below the navigation bar is the title 'Users'. On the right side, there is a red-bordered button with a plus sign and the text 'ADD A NEW USER'. Below this is a table with the following data:

First Name	Last Name	Email	Username	User Since	Status	Action
Elizabeth	Lazarou	elizabeth.lazarou@nyserda.ny.gov	elizabeth.lazarou@nyserda.ny.gov.nyserda	October 30, 2017	Active	Edit
Matt	Houle	matthew.houle@nyserda.ny.gov	matthew.houle@nyserda.ny.gov.nyserda	October 30, 2017	Active	Edit
Sherri	CalabreseUAT	sherri.calabrese@nyserda.ny.gov	sherri.calabrese@nyserda.ny.gov.resuat	October 17, 2017	Active	Edit

Clicking one of the links opens either the Edit User page or the Add a New User page. Both pages provide the option to check or uncheck the Admin box. If the Admin checkbox is checked, the user is provided administrator rights on the account. An unchecked Admin box means the user does not have administrator rights.

The screenshot shows a form titled 'Please enter new user information:'. It contains three input fields for 'First Name', 'Last Name', and 'Email'. Below these is an 'Admin' checkbox, which is highlighted with a red border. At the bottom of the form are two buttons: 'CLOSE' and 'SAVE CHANGES'.

**Note:** Deactivation from administrative access must be done by a user other than the administrator interested in withdrawing. For example, employee A is the administrator on an account. If employee A needs to step down from the administrator role, he or she would need to set up a second user—employee B—with administrator rights. Employee B would then remove employee A’s administrator status.

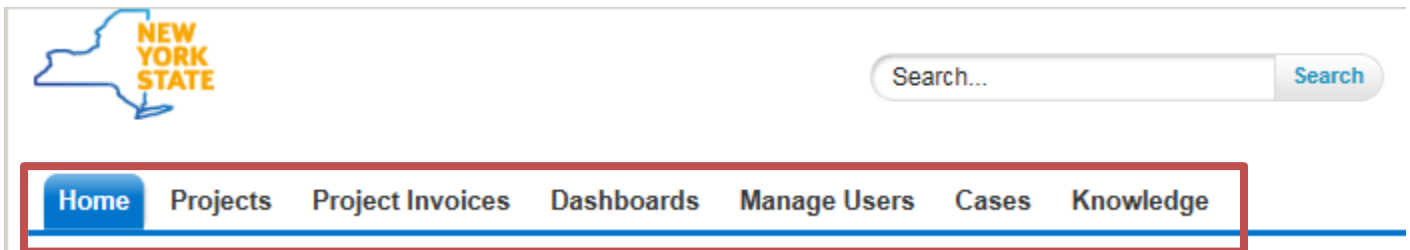
**Note:** In the event the administrator has left the company without setting up a second user, submit a case (See Section 6: [Creating a Case](#)). NYSERDA and/or the implementation team is prepared to coordinate the access change.

## 4.4 Changing the Primary Contact on an Account

Changing the primary on the account is done by NYSERDA or the implementation team exclusively. To request a change to the primary on the account, submit a case (See Section 6: [Creating a Case](#)) with the contact details of the new primary.

## Section 5: System Navigation

The NYSERDA Portal has many components. The most applicable to the residential support cases are Home, Cases, Knowledge, and if you are an administrator on your account, Manager Users. Each component the user has access to appears as a tab across the top of the page.



Clicking a tab takes the user to that component's home page. For example, clicking Cases navigates to the Cases Home page.

### 5.1 Viewing Cases with List Views

A list view is a customized list of records based on predefined criteria. Some list views have been developed for all users. The Cases Home page defaults to the Recent Cases list view. The Recent Cases list view shows a listing of cases recently viewed by the user for quick navigation to those cases.



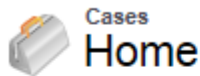
Select the cases you want to view from the dropdown.

View:

Case Number	Subject	Date/Time Opened	Priority	Status
<a href="#">00010454</a>	<a href="#">Audit Review Batch [Date of audit batch]</a>	11/9/2017 12:04 PM	Low	Active
<a href="#">00010441</a>	<a href="#">Customer Concern</a>	11/6/2017 4:26 PM	High	Active
<a href="#">00010519</a>	<a href="#">Primary and administrator change</a>	12/21/2017 9:55 AM	Medium	New

To view other cases associated with the NY Residential Existing Homes Programs or the user, access the dropdown menu for the View field on the Cases Home page and select one of the views that start with “Residential” or “My.”

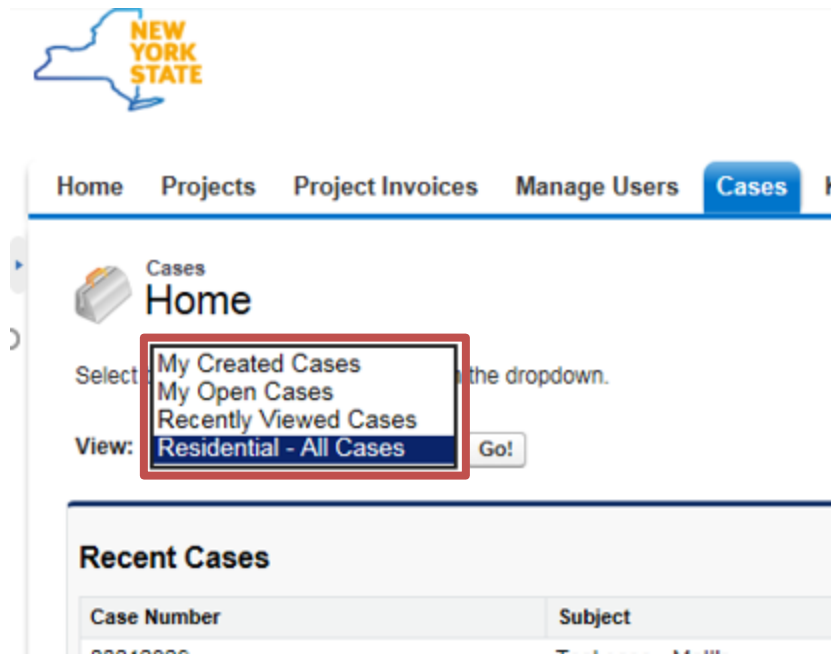
**Note:** Options available in the dropdown list may vary based on the user’s access to program areas in the system.



Select the cases you want to view from the dropdown.

View:

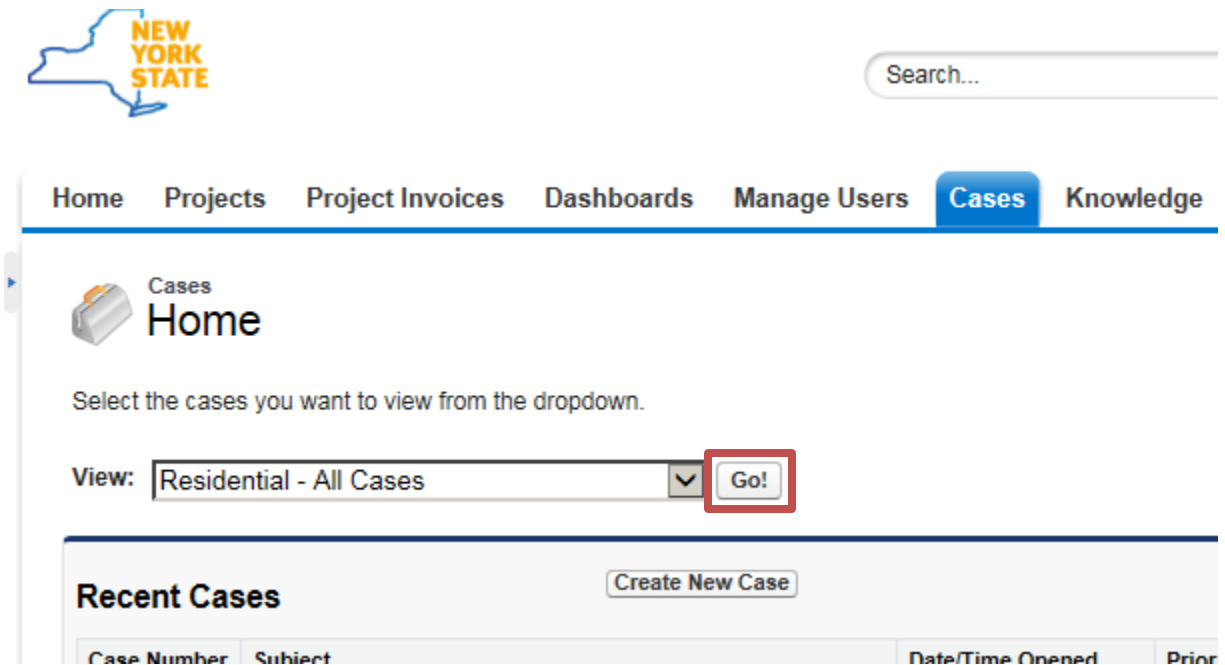
Case Number	Subject	Date/Time Opened	Priority	Status
<a href="#">00010454</a>	<a href="#">Audit Review Batch [Date of audit batch]</a>	11/9/2017 12:04 PM	Low	Active
<a href="#">00010441</a>	<a href="#">Customer Concern</a>	11/6/2017 4:26 PM	High	Active



Key list views available include the following:

1. **My Created Cases:** Displays a listing of all cases the user created.
2. **Recently Viewed Cases:** Displays a listing of cases recently accessed by the user.
3. **Residential – All Cases:** Displays a listing of all cases associated with the NY Residential Existing Homes Programs.

After selecting the List View, click the Go! button.



Clicking Go! populates the list view with all cases associated with the selection. Each column in the list view is sorted by clicking on the header. In this example, the cases have been sorted alphabetically (Z to A) by status.

Home Projects Project Invoices Dashboards Manage Users **Cases** Knowledge

Residential - All Cases

New Case

A B C D E F G H I J K L M N O P Q R S T U V

Action	Case Number	Subject	Status ↑	Priority	Date/Time O
Edit   +	<a href="#">00010232</a>	<a href="#">Test Macro: Contractor Deactivation - 1</a>	New	Medium	10/19/2017
Edit   +	<a href="#">00010253</a>	<a href="#">Take 3</a>	New	Medium	10/20/2017
Edit   +	<a href="#">00010318</a>	<a href="#">Test: other: queue</a>	New	Medium	10/20/2017
Edit   +	<a href="#">00010337</a>	<a href="#">Sherri's test email for the day!</a>	New	Medium	10/24/2017
Edit   +	<a href="#">00010338</a>	<a href="#">I can't get this project to pass HPXML</a>	New	Medium	10/24/2017

To jump to a specific status, click on the letter with which the status begins. In this example, selecting A jumped the results to those statuses starting with the letter A.

Home Projects Project Invoices Dashboards Manage Users **Cases** Knowledge

Residential - All Cases

List Feed

New Case

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Case Number	Subject	Status ↑	Priority	Date/Time Opened	Case Owner AI
Edit   +	<a href="#">00010224</a>	<a href="#">Customer states they need help after measu...</a>	Active	Medium	10/18/2017 1:00 PM	<a href="#">SCala</a>
Edit   +	<a href="#">00010234</a>	<a href="#">Test Macro: Contractor Deactivation - Step 3</a>	Active	Medium	10/19/2017 11:56 AM	<a href="#">SCala</a>
Edit   +	<a href="#">00010235</a>	<a href="#">Test Macro: Deactivation 3 - Take 2</a>	Active	Medium	10/19/2017 11:58 AM	<a href="#">SCala</a>
Edit   +	<a href="#">00010236</a>	<a href="#">Probation Notice [Date]</a>	Active	High	10/19/2017 1:11 PM	<a href="#">SCala</a>
Edit   +	<a href="#">00010237</a>	<a href="#">Contractor Suspension for BPI Accreditation...</a>	Active	High	10/19/2017 1:15 PM	<a href="#">SCala</a>

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## 5.2 Using the Search Field

At the top of any page within the NYSERDA Portal is a search field that allows the user to apply keywords to find specific cases or other record types.

- Home
- Projects
- Project Invoices
- Dashboards
- Manage Users
- Cases**
- Knowledge



The search engine searches the entire system for all records associated with those keywords and returns results across all record types in the system accessible to the user. For example, a search for “test” found 14 activities, 25+ cases, and four case comments.


[Options...](#)**Activities (14)**

Subject	Name	Related To	Due Date
<a href="#">Test Task to Contractor</a>	<a href="#">Test Contact</a>	<a href="#">00010224</a>	
<a href="#">Test Task to a Contractor</a>			
<a href="#">Email: Test 2</a>		<a href="#">00010224</a>	10/20/2017
<a href="#">Email: Test Additional To</a>		<a href="#">00010441</a>	11/12/2017
<a href="#">Email: Test: New Email String</a>		<a href="#">00010471</a>	11/12/2017

[Show More](#)**Cases (25+)**

Action	Case Number	Subject	Status	Date/Time Opened	Ca
<a href="#">Edit</a>	<a href="#">00010441</a>	<a href="#">Test Case: Start-To-Finish</a>	New	11/6/2017 4:26 PM	<a href="#">SC</a>
<a href="#">Edit</a>	<a href="#">00010433</a>	-	New	11/2/2017 2:46 PM	<a href="#">SC</a>
<a href="#">Edit</a>	<a href="#">00010471</a>	<a href="#">Test: Email to Case</a>	New	11/10/2017 2:00 PM	Re
<a href="#">Edit</a>	<a href="#">00010446</a>	<a href="#">Test: Deactivation 1 Macro</a>	Active	11/9/2017 9:33 AM	<a href="#">SC</a>
<a href="#">Edit</a>	<a href="#">00010400</a>	<a href="#">Customer Concern</a>	Closed	10/24/2017 2:06 PM	<a href="#">SC</a>

[Show More](#)**Case Comments (4)**

Case Number	Body
<a href="#">00010433</a>	This is a test public comment on 10433

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## 5.3 Organizing Search Results

To the left of the search results is a menu of Records. Clicking one of the record types in the Records menu directs the user to the section with the results for that record type. In this example, clicking the Activities (14) record type navigates the user to the Activities results.

### Search Results

Search Feeds | test | Search Activities | Options...

**Records**

- Cases (25+) ✕
- Campaigns (16) ✕
- NYSUN Picklists (0)
- People (25+)
- Accounts (3)
- Solicitation (8)
- Case Comments (4)
- Contacts (11)
- Project Invoices (0)
- Activities (14)**
- Articles (2)

Subject	Name
<a href="#">Test Task to Contractor</a>	<a href="#">Test Contac</a>
<a href="#">Test Task to a Contractor</a>	
<a href="#">Email: Test 2</a>	
<a href="#">Email: Test Additional To</a>	
<a href="#">Email: Test: New Email String</a>	
<a href="#">Email: Test Adding An Attachment</a>	
<a href="#">Email: SF test email</a>	
<a href="#">Email: Test email from case 10224</a>	
<a href="#">Email: Document Review - Test</a>	
<a href="#">Email: Lea's Test Email from Customer Concern Case</a>	
<a href="#">Email: hello</a>	

To pin the most commonly used record types to the top of the side menu for easier navigation, hover over one of the options in this menu to display a pushpin symbol, and then click the pushpin to pin the record type to the top.

### Search Results

Search Feeds | test | Search Activities | Options...

**Records**

- Cases (25+) ✕
- Campaigns (16) ✕
- NYSUN Picklists (0)
- People (25+)
- Accounts (3)
- Solicitation (8)
- Case Comments (4)
- Contacts (11)
- Project Invoices (0)
- Activities (14)**
- Articles (2)

Subject	Name
<a href="#">Test Task to Contractor</a>	<a href="#">Test Contact</a>
<a href="#">Test Task to a Contractor</a>	
<a href="#">Email: Test 2</a>	
<a href="#">Email: Test Additional To</a>	
<a href="#">Email: Test: New Email String</a>	
<a href="#">Email: Test Adding An Attachment</a>	
<a href="#">Email: SF test email</a>	
<a href="#">Email: Test email from case 10224</a>	
<a href="#">Email: Document Review - Test</a>	
<a href="#">Email: Lea's Test Email from Customer Concern Case</a>	

When a search is conducted, the results are displayed in the order of record type as presented in the side menu. In this example, Activities, Cases, and Case Comments were pinned to the top.

## Search Results

The screenshot shows a search interface with the following elements:

- Search Feeds:** Search Feeds button, search input field containing "test", Search All button, and Options... button.
- Records:** A list of record types on the left side menu, including: Activities (14), Cases (25+), Case Comments (4), Campaigns (16), NYSUN Picklists (0), People (25+), and Accounts (3). The "Activities (14)" item is highlighted with a red box.
- Activities (14):** A table of search results for the selected record type. The table has three columns: Subject, Name, and Related To. The results shown are:

Subject	Name	Related To
<a href="#">Test Task to Contractor</a>	<a href="#">Test Contact</a>	<a href="#">00010224</a>
<a href="#">Test Task to a Contractor</a>		
<a href="#">Email: Test 2</a>		<a href="#">00010224</a>
<a href="#">Email: Test Additional To</a>		<a href="#">00010441</a>
<a href="#">Email: Test: New Email String</a>		<a href="#">00010471</a>

If the record type does not appear in the search results, click on the Search All link to search additional record types. In this example, the search results did not display attachments for the searched word "test."

## Search Results

The screenshot shows a search interface with the following elements:

- Search Feeds:** Search Feeds button, search input field containing "test", Search Activities button, and a refresh icon.
- Records:** A list of record types on the left side menu, including: Cases (25+), Campaigns (16), NYSUN Picklists (0), People (25+), Accounts (3), Solicitation (8), Case Comments (4), Contacts (11), Project Invoices (0), Activities (14), and Articles (2). The "Activities (14)" item is highlighted with a blue bar.
- Search All:** A red box highlights the "Search All" button at the bottom of the Records list.
- Activities (14):** A table of search results for the selected record type. The table has one column: Subject. The results shown are:

Subject
<a href="#">Test Task to Contractor</a>
<a href="#">Test Task to a Contractor</a>
<a href="#">Email: Test 2</a>
<a href="#">Email: Test Additional To</a>
<a href="#">Email: Test: New Email String</a>
<a href="#">Email: Test Adding An Attachment</a>
<a href="#">Email: SF test email</a>
<a href="#">Email: Test email from case 10224</a>
<a href="#">Email: Document Review - Test</a>
<a href="#">Email: Lea's Test Email from Customer Concern Case</a>
<a href="#">Email: hello</a>
<a href="#">Email: Testing the SF Interface</a>

Clicking the Search All link searches all record types in the system and returns the results. In this example, searching for "test" now returns six Attachments.



# Search Results

 Search Feeds





test

Search All



Options...

## Records

- Cases (25+) 
- Activities (14) 
- Case Comments (4) 
- Campaigns (16) 
- NYSUN Picklists (0)
- People (25+)
- Accounts (3)
- Solicitation (8)
- Contacts (11)
- Project Invoices (0)
- Articles (2)
- Asset Relationships (0)
- Assets (0)
- Attachments (6)**
- Badges (0)

## Cases (25+)

Action	Case Number	Subject	Status
<a href="#">Edit</a>	<a href="#">00010441</a>	<a href="#">Test Case: Start-To-Finish</a>	New
<a href="#">Edit</a>	<a href="#">00010433</a>	-	New
<a href="#">Edit</a>	<a href="#">00010471</a>	<a href="#">Test: Email to Case</a>	New
<a href="#">Edit</a>	<a href="#">00010446</a>	<a href="#">Test: Deactivation 1 Macro</a>	Active
<a href="#">Edit</a>	<a href="#">00010400</a>	<a href="#">Customer Concern</a>	Closed

[Show More](#)

## Activities (14)

Subject	Name
<a href="#">Test Task to Contractor</a>	<a href="#">Test Contact</a>
<a href="#">Test Task to a Contractor</a>	
<a href="#">Email: Test 2</a>	
<a href="#">Email: Test Additional To</a>	
<a href="#">Email: Test: New Email String</a>	

[Show More](#)


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## 5.4 Viewing a Case

To view a case, click on the case number or subject link from (1) the Recent Cases view, (2) any of the list views, or (3) the search results:

1.

Home Projects Project Invoices Dashboards Manage Users **Cases** Knowledge

 **Cases Home**

Select the cases you want to view from the dropdown.


View:

**Recent Cases**

Case Number	Subject	Date/Time Opened	Priority	Status
<a href="#">00010441</a>	<a href="#">Customer Concern</a>	11/6/2017 4:26 PM	High	Active
<a href="#">00010454</a>	<a href="#">Audit Review Batch [Date of audit batch]</a>	11/9/2017 12:04 PM	Low	Active
<a href="#">00010519</a>	<a href="#">Primary and administrator change</a>	12/21/2017 9:55 AM	Medium	New

2.

Home Projects Project Invoices Dashboards Manage Users **Cases** Knowledge



A B C D E F G H I J K L M N O P Q R S T U V

Action	Case Number	Subject	Status ↑	Priority	Date/Time O
<a href="#">Edit</a>   <input data-bbox="203 1144 227 1176" type="button" value="+"/>	<a href="#">00010232</a>	<a href="#">Test Macro: Contractor Deactivation - 1</a>	New	Medium	10/19/2017
<a href="#">Edit</a>   <input data-bbox="203 1186 227 1218" type="button" value="+"/>	<a href="#">00010253</a>	<a href="#">Take 3</a>	New	Medium	10/20/2017
<a href="#">Edit</a>   <input data-bbox="203 1228 227 1260" type="button" value="+"/>	<a href="#">00010318</a>	<a href="#">Test: other: queue</a>	New	Medium	10/20/2017
<a href="#">Edit</a>   <input data-bbox="203 1270 227 1302" type="button" value="+"/>	<a href="#">00010337</a>	<a href="#">Sherri's test email for the day!</a>	New	Medium	10/24/2017
<a href="#">Edit</a>   <input data-bbox="203 1312 227 1344" type="button" value="+"/>	<a href="#">00010338</a>	<a href="#">I can't get this project to pass HPXML</a>	New	Medium	10/24/2017

3.

### Search Results

**Records**

- Cases (25+)
- Case Comments (4)
- Campaigns (16)

**Cases (25+)**

Action	Case Number	Subject	Status	Date/Time Opened
<a href="#">Edit</a>	<a href="#">00010441</a>	<a href="#">Test Case: Start-To-Finish</a>	New	11/6/2017 4:26 PM
<a href="#">Edit</a>	<a href="#">00010433</a>	-	New	11/2/2017 2:46 PM

When a case is selected, the view defaults to the details tab, which provides access to the available fields as well as the following sections: [Attachments](#), [Case Comments](#), [Activities](#), and [Articles](#) (See Sections 13-16).

Home Projects Project Invoices Dashboards Manage Users **Cases** Knowledge

Case Roles  
Residential Test Account  
Test Contact

Case Number 00010441 Created Date 11/6/2017 4:26 PM

**Customer Concern**  
This case will be used to test all fields and sections. -sc

Status Acti  
Priority Mec  
Case Owner She

RELATED LISTS  
Attachments (8)  
Case Comments (4)  
Open Activities (2)  
Activity History (5)  
Articles (2)

Feed **Details**

**Case Detail**

Case Number	00010441	Case Record Type	Residential - Project/Customer Conce
Case Owner	<a href="#">Sherrri Calabrese</a> [Change]	Request Type	Project/Customer Concern
Contact Name	<a href="#">Test Contact</a>	Contractor Account Name	Residential Test Account
Account Name	<a href="#">Res Test Account</a>	Customer Name	Test Contact
Contact Phone	111-111-1111		

**Additional Information**

Status Acti  
Priority Mec  
Case Owner She

To view a chronological detail of events that have taken place with the case, click on the Feed tab.

Home Projects Project Invoices Dashboards Manage Users **Cases**

Case Roles  
Residential Test Account  
Test Contact

Case Number 00010441 Created Date 11/6/2017 4:26 PM

**Test Case: Start-To-Finish**  
This case will be used to test all fields and sections. -sc

**Feed** Details

Post File Poll

Click here to expand the Post action.

**Articles**

**All Updates for this case**

Sort By **Most Recent Activity**

**Email: Project Available in NY HP Portal** — [Sherrri Calabrese](#) (Single Family Residential) created a task.

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## Section 6: Creating a Case

A case is the mechanism used to communicate, track, and resolve questions, issues, or concerns. It is the primary tool for participating contractors to request assistance from the program, ask questions, and resolve customer concerns.

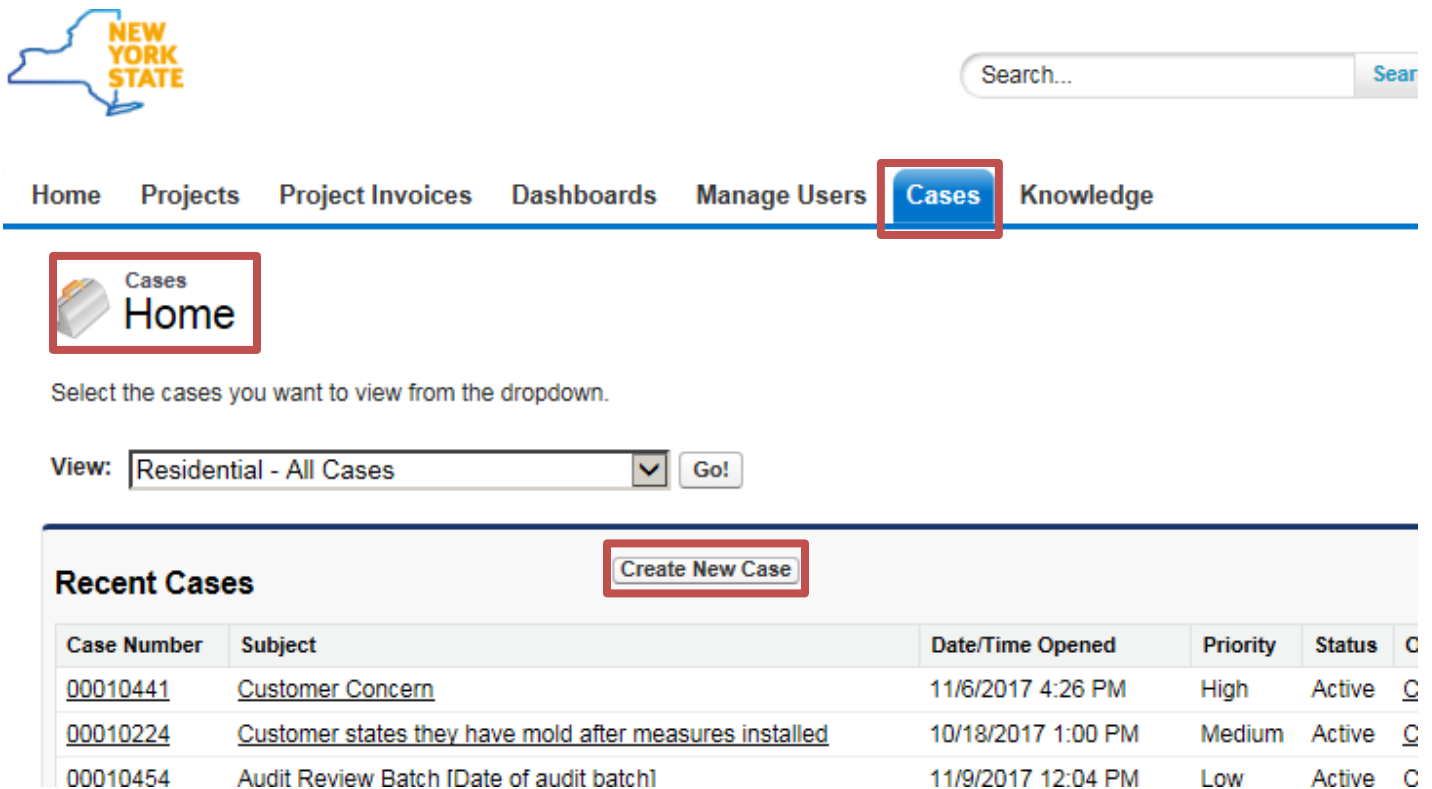
There are three options for submitting a case:

1. Log in to the NYSERDA Portal and directly entering the required information.
2. Email [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov) to contact the contractor support team.
3. Call the contractor support line at 1-800-284-9069.

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### 6.1 Create a Case via Logging In

To create a new case from the Cases Home page, click the Create New Case button in the Recent Cases section.



NEW YORK STATE

Search... [Search](#)

[Home](#) [Projects](#) [Project Invoices](#) [Dashboards](#) [Manage Users](#) **Cases** [Knowledge](#)

**Cases Home**

Select the cases you want to view from the dropdown.

View:

**Recent Cases**

Case Number	Subject	Date/Time Opened	Priority	Status	C
<a href="#">00010441</a>	<a href="#">Customer Concern</a>	11/6/2017 4:26 PM	High	Active	<a href="#">C</a>
<a href="#">00010224</a>	<a href="#">Customer states they have mold after measures installed</a>	10/18/2017 1:00 PM	Medium	Active	<a href="#">C</a>
00010454	Audit Review Batch [Date of audit batch]	11/9/2017 12:04 PM	Low	Active	C

Clicking the Create New Case button from the Cases Home page opens the New Case/Select Case Record Type page.



Search...

New Case  
**Select Case Record Type**

Select a record type for the new case.

**Select Case Record Type**

Record Type of new record

Click the Record Type in the new record dropdown box and select the appropriate Case Record Type (see Section 8: [Case Classification](#) for information regarding Case Record Types and their use).

**Select Case Record Type**

Record Type of new record

- General
- NY Sun - Commercial/Industrial
- NY Sun - Residential/Small Commercial
- Residential - General Program Questions**
- Residential - Project/Customer Concern
- Residential - Project Specific Question
- Solicitation Change Modification

When the appropriate Case Record Type is populated in the dropdown box, click on the Continue button.



New Case  
**Select Case Record Type**

Select a record type for the new case.

**Select Case Record Type**

Record Type of new record | Residential - General Program Questions

Continue Cancel

After clicking Continue, the Case Edit/New Case page opens. The Case Edit page is where information applicable to the case should be entered.

Case Edit  
**New Case**

**Case Edit** Submit Save & Close Save & New Cancel

**Case Information** \* = Required

Case Owner	Sherri CalabreseUAT	Case Record Type	Residential - General Program Questions
Contact Name	<input type="text"/>	Request Type	--None--
Account Name		Contractor Account Name	
		Customer Name	

**Additional Information**

Status	New	Program	--None--
Priority	Medium		
Case Origin	--None--		

**Description Information**

As indicated on the page, all system-required fields show a red, vertical bar next to the field.

Case Edit  
**New Case**

**Case Edit**

**Case Information**

Case Owner	Sherri CalabreseUAT	Case Record Type	Residential - General Program Questions
Contact Name	<input type="text"/>	Request Type	--None--
Account Name		Contractor Account Name	
		Customer Name	

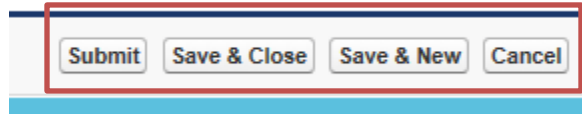
**Additional Information**

**! = Required Information**

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### 6.1.1 Save Options

After the information has been entered into all system-required fields, save the information by clicking one of the Save options at the top or bottom of the page.



Save options:

1. **Submit:** Select the Submit button to save the information entered into the case and generate a unique case number. When the information is saved, the case defaults to the Details tab.

Home Projects Project Invoices Dashboards Manage Users **Cases** Knowledge

---

Case Roles

Case Number 00010523 Created Date 1/4/2018 11:30 AM

## Help understanding inspection process

No Description


Status  
Priority  
Case Owner

RELATED LISTS

- Case Comments (0)
- Articles (0)
- Open Activities (0)
- Activity History (0)
- Attachments (0)

Feed **Details**

### Case Detail

Case Number	00010523	Case Record Type	Residential - General F Questions <a href="#">[Change]</a>
Case Owner	Residential - Triage Queue <a href="#">[Change]</a>	Request Type	General/Process Ques
Contact Name	 <a href="#">Sherri CalabreseUAT</a>	Contractor Account Name	
Account Name	<a href="#">Residential Test Account</a>	Customer Name	
Contact Phone			

The Details tab of a case, displays all associated fields and sections for the case (See Sections 9-16).

To see a chronological detail of events that have taken place with the case, click on the Feed tab. In this situation, the case was just created and therefore has only two entries. The number of entries increases as actions are taken pertaining to the case.



Case Roles

 Case Number 00010523 Created Date 1/4/2018 11:30 AM


## Help understanding inspection process

*No Description***Feed**

Details

 **Post**  **File**  **Poll**[Click here to expand the Post action.](#)**+ Articles**

### All Updates for this case

 | Sort By **Most Recent Activity** ▾**Sherri CalabreseUAT** (Partner) replied to customer service. This is a test comment for case 10523.

2. **Save & Close:** *This is not the recommended method to save a case.* Select the Save & Close button to save the case, generate a unique case number, and open the Close Case page.

**Note:** Participating contractors do not have permission to close cases. If a participating contractor clicks the Submit button from the Close Case page, an error message appears. Selecting the cancel button returns the user to the saved case.

## Close Case

**Case Edit**
Submit Cancel

Error: Invalid Data.  
Review all error messages below to correct your data.  
You are not authorized to edit this case.

**Case Information**

Status Closed

Internal Comments

Submit
Cancel

3. **Save & New:** Select the Save & New button to save the information entered in to the case and generate a unique case number. The system exits the case and returns the user to the New Case/Select Case Record Type page to start a new case.
4. **Cancel:** Selecting the cancel button does not save the case and the user is returned to the Cases Home page.

Selecting one of the save options prior to entering information in to all required fields results in an error message(s):

## Case Edit New Case

**Case Edit**
Submit Save & Close Save & New Cancel

Error: Invalid Data.  
Review all error messages below to correct your data.

**Case Information** ! = Required Information

Case Owner Sherri CalabreseUAT

Contact Name

Account Name

Case Record Type Residential - General Program Questions

Request Type --None--

Error: You must enter a value

Contractor Account Name

Customer Name

**Additional Information**

Status New

Priority Medium

Case Origin --None--

Error: You must enter a value

Program --None--

Parent Case

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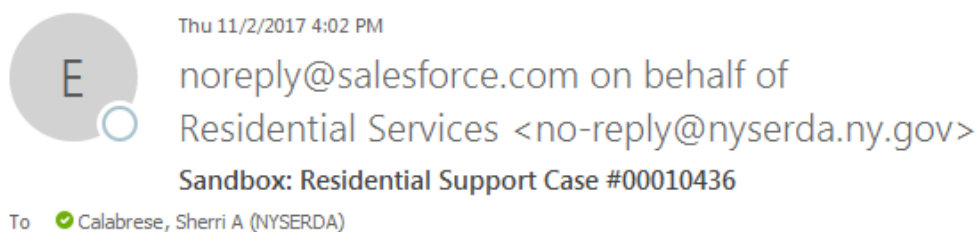
## 6.2 Submitting a Case via the Contractor Support Email

Any email sent to the contractor support email address, [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov), that is not already linked to a case, automatically produces a new case in the NYSERDA Portal. These cases are routed to the triage team, who monitor cases on business days. The triage team responds to inquiries when appropriate or routes cases to the appropriate team (e.g., finance, technical services, etc.).

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## 6.3 Confirmation Email

For all cases created by a contractor, the requester receives a reply email from the NYSERDA Portal indicating that the request for support has been received and a case was created. The email received is similar to the following example.



---

**ATTENTION:** This email came from an external source. Do not open attachments or click on links from unknown senders or unexpected emails.

Thank you for submitting a request for assistance. Case #00010436 has been created in the NYSERDA Portal, and a member of our team will respond to you as soon as possible.

To expedite resolution of your case, please be sure you have provided the following information:

1. Summary of the issue, concern, or question
2. Name of the contractor/company involved with the project
3. Customer name and/or project ID number

Replying to this email will automatically attach the new information to the case.

Thank you.

ref:\_00D35cCx.\_50035166ka:ref

Replying to this email automatically updates the case (see Section 7.1: [Email to Case](#)).

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## Section 7: Updating a Case

Once a case has been submitted, the participating contractor cannot edit associated fields. If information is incorrect or needs to be updated, details should be provided by email (see Section 7.1: [Email to Case](#)) or by adding a Case Comment (See Section 14: [Case Comments](#)).

### 7.1 Email to Case

Most emails received from the NYSERDA Portal for contractor support cases regarding the NY Residential Existing Homes Programs are linked to the case from which the communication was generated. When an email is sent, a reference (ref:) number is included in the body of the email. This number is the identification linking the email to the case, similar to the following example.



**ATTENTION:** This email came from an external source. Do not open attachments or click on links from unknown senders or unexpected emails.

Thank you for submitting a request for assistance. Case #00010525 has been created in the NYSERDA Portal, and a member of our team will respond to you as soon as possible.

To expedite resolution of your case, please be sure you have provided the following information:

1. Summary of the issue, concern, or question
2. Name of the contractor/company involved with the project
3. Customer name and/or project ID number

Replying to this email will automatically attach the new information to the case.

Thank you.

ref:\_00D35cCx\_5003517FJC:ref

When a recipient of an email with a ref: number replies, the associated case automatically updates.

**Note:** If the ref: number is deleted from an email on reply or forward, the email does not link to the case—instead, a new case is created.

**Note:** Sending a new email to [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov) automatically creates a new case in the NYSERDA Portal.

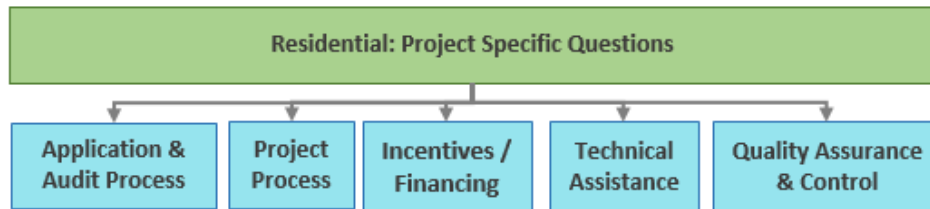
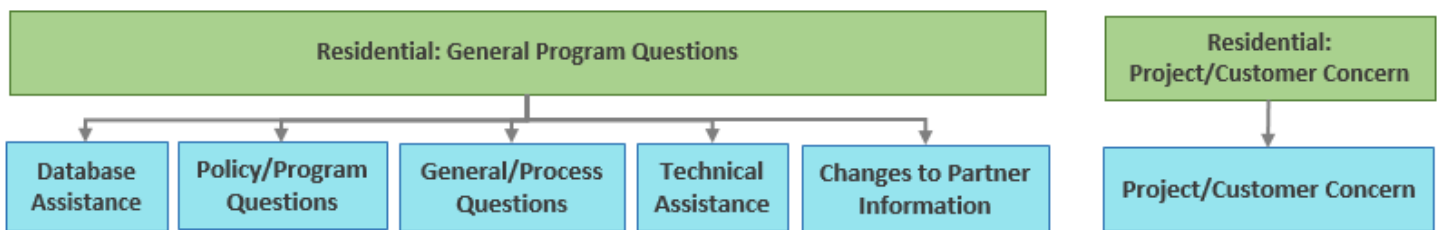
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## Section 8: Case Classification

There are two primary ways in which a case is classified: Case Record Type and Request Type. Classifying a case appropriately quickly communicates the nature of the case to program teams, helps during triage to ensure the case is routed to the correct team, and assists in reporting. Classification starts when creating a new case and choosing the Case Record Type. The Case Record Type selected determines which Request Types are available.

To understand the hierarchy, the following charts have been provided for each Case Record Type. Each chart shows the Case Record Type in green and its corresponding, available Request Type(s) in blue.

<b>Case Record Type</b>	First classification and determines which Request Types are available for the case.
<b>Request Type</b>	Second classification and determines which Sub-Request Types are available.




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### 8.1 Case Record Types

The Case Record Type is the first classification of a case providing an overall description of the issue or question and determines which options are available in the Request Type field. To distinguish Case Record Types that are specific to the NY Residential Existing Homes Programs, the word "Residential" has been added to the beginning of the Case Record Type.

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New Case  
 **Select Case Record Type**

Select a record type for the new case.

Select Case Record Type	
Record Type of new record	<ul style="list-style-type: none"><li>General</li><li>NY Sun - Commercial/Industrial</li><li>NY Sun - Residential/Small Commercial</li><li><b>Residential - General Program Questions</b></li><li>Residential - Project/Customer Concern</li><li>Residential - Project Specific Question</li><li>Solicitation Change Modification</li></ul>

Case Record Types include:

1. **Residential – General Program Questions:** Program related questions that are not specific to an individual project.
2. **Residential – Project/Customer Concern:** Management of customer or project related concerns.
3. **Residential – Project Specific Question:** Questions related to a specific project.

**Note:** There are two other Case Record Types that could be assigned to contractors: Residential – Change of Status and Residential – HPwES Audit Review. Participating contractors cannot create cases with these Case Record Types but could be assigned as a contractor, when the case is created by program staff.

Change of Status cases are specific to when a contractor’s participation status in the program changes (e.g., move from provisional to full).

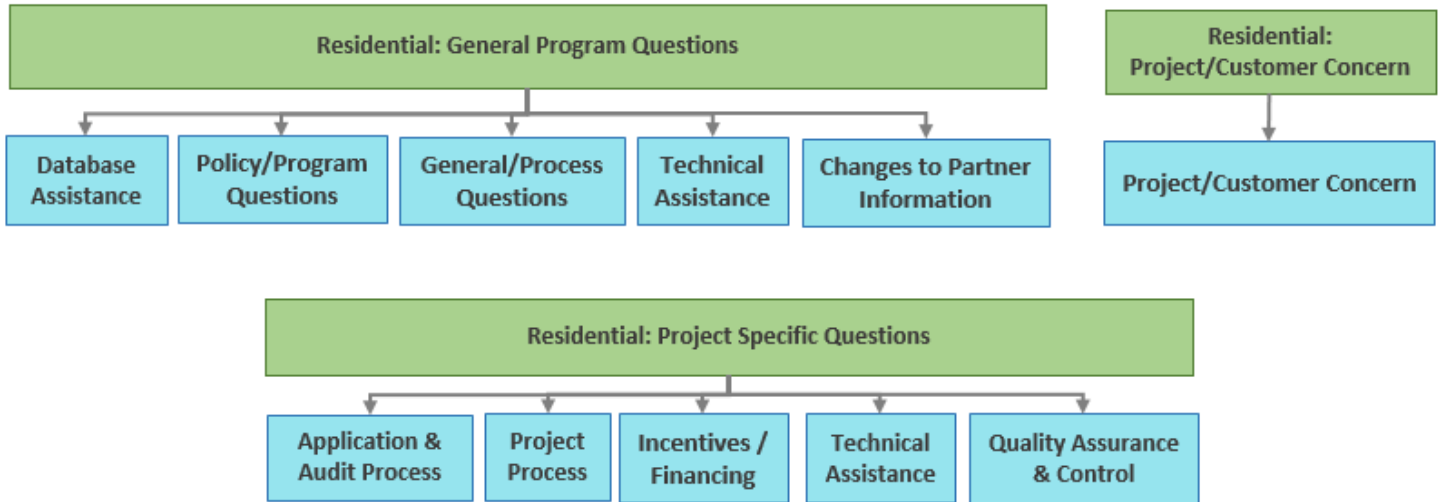
HPwES Audit Review cases are specific to the audit review process conducted by the program to ensure audit submissions meet program requirements. When an audit does not meet program requirements, the case is issued to the contractor for corrections.

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## 8.2 Request Types

The Request Type is the second classification of a case providing additional detail regarding the issue or question. Setting the appropriate Request Type assists with triage and reporting.

The Project/Customer Concern Case Record Type has only one Request Type whereas the other Case Record Types have several. Where there is only one Request Type, the field defaults to the available Request Type. Instances in which there are multiple Request Types, the Request Type requires manual selection.



1. When the Case Record Type is **Residential – General Program Questions**, Request Type includes:
  - a. **Database Assistance:** Support requests related to the Program’s various database and software products. Some examples may include the following:
    1. Requesting to add, remove, or update users from a program system
    2. HPXML validation concern/issue
    3. Database related questions – CRIS, NY HP Portal, QACSS, NYSERDA Portal
  - b. **Policy/Program Question:** Questions relating to overall policies in the program. Some examples may include the following:
    1. Question about a program form
    2. Questions/concerns regarding program procedures
  - c. **General/Process Questions:** Questions relating to overall processes within the program. Some examples may include the following:
    1. General auditing questions
    2. General work scope development questions
    3. General incentive questions
    4. General questions regarding the project closeout process, loan process, or loans after the work has been completed
  - d. **Technical Assistance:** General questions regarding the technical requirements of the program. Some examples may include the following:
    1. General questions about envelope/shell, HVAC, modeling, electric reduction, domestic hot water, or air source heat pump policies
    2. Questions about BPI standards or the Materials and Installation Guide (MIG)
  - e. **Changes to Partner Information:** Instances where partner’s information needs to be update. Some examples may include the following:
    1. Updates to company related information (e.g., address, DBA, etc.)

Case Edit  
New Case

**Case Edit**

**Case Information** |= Required

Case Owner	Sherri CalabreseUAT	Case Record Type	Residential - General Program Questions
Contact Name	<input type="text"/>	Request Type	<ul style="list-style-type: none"> <li>--None--</li> <li>Database Assistance</li> <li>Policy/Program Questions</li> <li>General/Process Questions</li> <li>Changes to Partner Information</li> <li>Technical Assistance</li> </ul>
Account Name		Contractor Account Name	
		Customer Name	

**Additional Information**

2. When the Case Record Type is **Residential – Project/Customer Concern**, Request Type includes **Project/Customer Concern**: Customer or project related concerns.

Case Edit  
New Case

**Case Edit**

**Case Information** |= Required

Case Owner	Sherri CalabreseUAT	Case Record Type	Residential - Project/Customer Concern
Contact Name	<input type="text"/>	Request Type	Project/Customer Concern
Account Name		Contractor Account Name	
		Customer Name	

3. When the Case Record Type is **Residential – Project Specific Question**, Request Type includes:
- a. **Application & Audit Process:** Application and audit related questions associated with a specific project. Some examples may include the following:
    1. Questions regarding an audit approval letter
    2. Request for an extension on an audit reservation number
    3. Issues with claiming an audit reservation number
    4. Questions regarding a customer’s eligibility
    5. Corrections to customer information
    6. Request for increased incentive amount (>3500 square feet)
    7. Request to change EmPower audit type
    8. Questions regarding landlord approval
  - b. **Project Process:** Project process related questions associated with a specific project. Some examples may include the following:
    1. Request to expedite a project due to a no-heat emergency
    2. Work scope approval extension request
    3. Reactivating a closed project



4. Project approval, completion, or on hold assistance
  5. Project review for State Historic Preservation Office (SHPO)
- c. **Incentives/Financing:** Incentive and financing questions related to a specific project. Some examples may include the following:
1. Question about incentives for a low-income project or audit incentive
  2. Question regarding an assisted subsidy on a project
  3. Extension requests for subsidies or loans
  4. Contractor incentive questions
  5. Invoicing related items
- d. **Technical Assistance:** Technical assistance required on a specific project. Some examples may include the following:
1. Questions about envelope/shell, HVAC, modeling, electric reduction, domestic hot water, or air source heat pump policies relating to a specific project
- e. **Quality Assurance & Control:** Inspection requests on specific projects and can be used for both in-process or post-completion inspections. Some examples may include the following:
1. Questions relating to inspections or inspection requests

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Case Edit **New Case**

**Case Edit**

**Case Information** |= Required

Case Owner	Sherrri CalabreseUAT	Case Record Type	Residential - Project Specific Question
Contact Name	<input type="text"/>	Request Type	<ul style="list-style-type: none"> <li>--None--</li> <li>Application &amp; Audit Process</li> <li>Project Process</li> <li>Incentives Financing</li> <li>Technical Assistance</li> <li>Quality Assurance &amp; Control</li> </ul>
Account Name		Contractor Account Name	
		Customer Name	

**Additional Information**

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## Section 9: Case Information Fields

The Case Information section displays the first set of fields available on the case. These fields are consistent across all Case Record Types. On the Details tab, the case information section of the case is placed on the top portion of the page.

Case Roles  
Residential Test Account  
Test Contact

Case Number 00010441 Created Date 11/6/2017 4:26 PM

Status New  
Priority Medium  
Case Owner Sherri Calabrese



### Test Case: Start-To-Finish

This case will be used to test all fields and sections. -sc

RELATED LISTS

- Attachments (3)
- Case Comments (1)
- Open Activities (0)
- Activity History (3)
- Articles (1)

Feed Details

Case Detail			
Case Number	00010441	Case Record Type	Residential - Project/Customer Concern <a href="#">[Change]</a>
Case Owner	 Sherri Calabrese <a href="#">[Change]</a>	Request Type	Project/Customer Concern
Contact Name	 <a href="#">Test Contact</a>	Contractor Account Name	Residential Test Account
Account Name	<a href="#">Res Test Account</a>	Customer Name	Test Contact
Contact Phone	111-111-1111		



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## 9.1 Case Number

The case number is a system-generated unique identifier that is assigned to all cases. All case numbers are assigned automatically when the case is first saved in the Case Edit/New Case page (see Section 6: [Creating a Case](#)).

Feed Details



### Case Detail

Case Number	00010441	Case Record Type	Residential - Project/Customer Concern <a href="#">[Change]</a>
Case Owner	 Sherri Calabrese <a href="#">[Change]</a>	Request Type	Project/Customer Concern
Contact Name	 <a href="#">Test Contact</a>	Contractor Account Name	Residential Test Account
Account Name	<a href="#">Res Test Account</a>	Customer Name	Test Contact
Contact Phone	111-111-1111		

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## 9.2 Case Owner

A case owner is the team or person responsible for overall monitoring and resolution management of a case.



Feed		Details	
<b>Case Detail</b>			
Case Number	00010441	Case Record Type	Residential - Project/Customer Concern <a href="#">[Change]</a>
Case Owner	 <a href="#">Sherri Calabrese</a> <a href="#">[Change]</a>	Request Type	Project/Customer Concern
Contact Name	 <a href="#">Test Contact</a>	Contractor Account Name	Residential Test Account
Account Name	<a href="#">Res Test Account</a>	Customer Name	Test Contact
Contact Phone	111-111-1111		

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### 9.3 Contact Name

The contact name field in the Case Information section is used to add information regarding the person requesting assistance.

**Note:** If the Contact Name field is *not* populated when a case is submitted from the NYSERDA Portal, the Contact Name defaults to the user creating the case.

Feed		Details	
<b>Case Detail</b>			
Case Number	00010441	Case Record Type	Residential - Project/Customer Concern <a href="#">[Change]</a>
Case Owner	 <a href="#">Sherri Calabrese</a> <a href="#">[Change]</a>	Request Type	Project/Customer Concern
Contact Name	 <a href="#">Test Contact</a>	Contractor Account Name	Residential Test Account
Account Name	<a href="#">Res Test Account</a>	Customer Name	Test Contact
Contact Phone	111-111-1111		

To change the Contact Name to a different user than the participating contractor, click on the magnifying glass next to the Contact Name field.

**Case Edit** Submit Save & Close Save & New Cancel

**Case Information** ! = Req

Case Owner: Sherri CalabreseUAT

Contact Name:  Go!

Account Name:

Case Record Type: Residential - Project/Customer Conc

Request Type: Project/Customer Concern

Contractor Account Name:

Customer Name:

**Additional Information**

Status: New

Program: --None--

From the Lookup page, select one of the recently viewed contacts from the company or search for the user with the search box. To search for a contact, type the contact name (all or partial names) in the search box and click the Go! button. Clicking the Go! button, provides a list of results. Clicking the Name link for the contact adds that contact to the case.

**Note:** Only system users associated with the participating contractor can be populated in the Contact Name field.

**Lookup**

Go!

Search  Name  All Fields

**Recently Viewed Contacts**

**Contacts [4]**



Name	Account Name	Email
<u><a href="#">Matt Houle</a></u>	Residential Test Account	matthew.houle@nyserda.ny.gov
<u><a href="#">Me Calabrese</a></u>	Residential Test Account	shercala@yahoo.com
<u><a href="#">Sherri CalabreseUAT</a></u>	Residential Test Account	sherri.calabrese@nyserda.ny.gov
<u><a href="#">Elizabeth Lazarou</a></u>	Residential Test Account	elizabeth.lazarou@nyserda.ny.gov

**Note:** If the case is created by sending an email to [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov) the sender is populated in the Contact Name field, either automatically or during triage.

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## 9.4 Account Name



If the requester has contact information in the system that includes the Account Name, the Account Name field displays the requester's company name as it is listed in the Contact record.

Feed	Details		
<b>Case Detail</b>			
Case Number	00010441	Case Record Type	Residential - Project/Customer Concern <a href="#">[Change]</a>
Case Owner	 <a href="#">Sherri Calabrese [Change]</a>	Request Type	Project/Customer Concern
Contact Name	 <a href="#">Test Contact</a>	Contractor Account Name	Residential Test Account
<b>Account Name</b>	<b><a href="#">Res Test Account</a></b>	Customer Name	Test Contact
Contact Phone	111-111-1111		

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## 9.5 Contact Phone



If the requester has contact information in the system that includes a Contact Phone, the Contact Phone field displays the requester's contact phone number as it is listed in the Contact record.

Feed	Details		
<b>Case Detail</b>			
Case Number	00010441	Case Record Type	Residential - Project/Customer Concern <a href="#">[Change]</a>
Case Owner	 <a href="#">Sherri Calabrese [Change]</a>	Request Type	Project/Customer Concern
Contact Name	 <a href="#">Test Contact</a>	Contractor Account Name	Residential Test Account
Account Name	<a href="#">Res Test Account</a>	Customer Name	Test Contact
<b>Contact Phone</b>	<b>111-111-1111</b>		

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## 9.6 Case Record Type and Request Type



See Section 8: [Case Classification](#) for details regarding the population of these fields. Cases submitted through the [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov) email default to Residential – General Program Questions and are updated as appropriate during triage.

Feed		Details	
<b>Case Detail</b>			
Case Number	00010441	Case Record Type	Residential - Project/Customer Concern <a href="#">[Change]</a>
Case Owner	 <a href="#">Sherri Calabrese [Change]</a>	Request Type	Project/Customer Concern
Contact Name	 <a href="#">Test Contact</a>	Contractor Account Name	Residential Test Account
Account Name	<a href="#">Res Test Account</a>	Customer Name	Test Contact
Contact Phone	111-111-1111		

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## 9.7 Contractor Account Name


The Contractor Account Name field is a locked field that is populated by the triage team.

Feed		Details	
<b>Case Detail</b>			
Case Number	00010441	Case Record Type	Residential - Project/Customer Concern <a href="#">[Change]</a>
Case Owner	 <a href="#">Sherri Calabrese [Change]</a>	Request Type	Project/Customer Concern
Contact Name	 <a href="#">Test Contact</a>	Contractor Account Name	Residential Test Account
Account Name	<a href="#">Res Test Account</a>	Customer Name	Test Contact
Contact Phone	111-111-1111		

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## 9.8 Customer Name

The Customer Name field is a locked field that is populated by the triage team.

Feed		Details	
<b>Case Detail</b>			
Case Number	00010441	Case Record Type	Residential - Project/Customer Concern <a href="#">[Change]</a>
Case Owner	 <a href="#">Sherri Calabrese [Change]</a>	Request Type	Project/Customer Concern
Contact Name	<a href="#">Test Contact</a>	Contractor Account Name	Residential Test Account
Account Name	<a href="#">Res Test Account</a>	<b>Customer Name</b>	<b>Test Contact</b>
Contact Phone	111-111-1111		

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## Section 10: Additional Information Case Section

The Additional Information section displays the second set of fields available on the case. These fields are consistent across all Case Record Types. On the Details tab, the Additional Information section includes fields from both the Additional Information and Description Information sections of the case.

Additional Information			
Status	New	Program	Coordinated
Priority	Medium		
Case Origin	Phone		
Subject	Test Case: Start-To-Finish		
Description	This case will be used to test all fields and sections. -sc		

On the Case Edit page, Additional Information and Description Information are broken into separate sections.

**Additional Information**

Status	<input type="text" value="New"/>		Program	<input type="text" value="--None--"/>
Priority	<input type="text" value="Medium"/>			
Case Origin	<input type="text" value="--None--"/>			

**Description Information**

Subject	<input type="text"/>
Description	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

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## 10.1 Status

The Status field refers to the status of the case. All cases default to “new” when they are created.

### Additional Information

Status	New	Program	Coordinated
Priority	Medium		
Case Origin	Phone		
Subject	Test Case: Start-To-Finish		
Description	This case will be used to test all fields and sections. -sc		

**Note:** When creating a case, changing the status to something other than “new” results in an error:

**Case Edit** Submit Save & Close Save & New Cancel

**Error: Invalid Data.**  
Review all error messages below to correct your data.

**Case Information** ! = Required

Case Owner: Sherri CalabreseUAT  
Contact Name:   
Account Name:   
Case Record Type: Residential - General Program Questions  
Request Type: Policy/Program Questions  
Contractor Account Name:   
Customer Name:

**Additional Information**

Status: Active   
**Error: Status must be "New" when creating a case.**  
Priority: Medium  
Case Origin: Phone   
Program: --None--

Statuses include the following:

1. **New:** When a case is newly created and no action has yet been taken.
2. **On Hold:** When a case is waiting for answers from other entities (e.g., a case that is waiting a final determination by NYSERDA before it can move forward).
3. **Active:** When a case is actively working toward resolution.
4. **Pending-Customer:** When a case is waiting for the customer to act (e.g., submit additional information, answer questions, etc.).
5. **Pending-Contractor:** When a case is waiting for the participating contractor to act (e.g., submit additional information, answer questions, etc.).
6. **Closed:** When a case has been closed or resolved.

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## 10.2 Priority

The priority level on a case indicates the immediacy of the request. All cases default to “medium” when they are created.

---

Additional Information		Program	Coordinated
Status	New		
Priority	Medium		
Case Origin	Phone		
Subject	Test Case: Start-To-Finish		
Description	This case will be used to test all fields and sections. -sc		

---

Priorities include the following:

1. **Urgent:** Cases that require immediate action.
2. **High:** Cases that may require more immediate action than routine inquiries but fall outside of the urgent definition.
3. **Medium:** Cases that do not need immediate follow up but require involvement by additional technical staff.
4. **Low:** Cases that do not need immediate follow up, or the case can be easily resolved.

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## 10.3 Case Origin

The Case Origin describes the mechanism used by the requester to submit a case. When a case is created by logging in to the NYSERDA Portal, the Web option should be selected.

---

Additional Information		Program	Coordinated
Status	New		
Priority	Medium		
Case Origin	Phone		
Subject	Test Case: Start-To-Finish		
Description	This case will be used to test all fields and sections. -sc		

---

**Case Edit** Submit Save & Close Save & New Cancel

**Case Information** ! = Required

Case Owner: Sherri CalabreseUAT  
 Contact Name:   
 Account Name:

Case Record Type: Residential - Project/Customer Concern  
 Request Type:   
 Contractor Account Name:   
 Customer Name:

**Additional Information**

Status:  Program:   
 Priority: Medium  
 Case Origin:  (dropdown menu open showing: --None--, Email, Phone, Web)

**Description Information**

Case Origin includes the following:

1. **Email:** Generated by an email submitted to the [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov) address.
2. **Phone:** Generation based on a phone call.
3. **Web:** Generated by the participating contractor by logging in to the NYSERDA Portal.

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## 10.4 Subject

The Subject is a brief description of the support request.

Additional Information	
Status	New
Priority	Medium
Case Origin	Phone
Subject	Test Case: Start-To-Finish
Description	This case will be used to test all fields and sections. -sc

**Description Information**

Subject: A short description of the case

Description: Details regarding the issue or question.

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### 10.5 Description

The Description is a detailed explanation of the assistance needed or concern.

**Additional Information**

Status	New	Program	Coordinated
Priority	Medium		
Case Origin	Phone		
Subject	Test Case: Start-To-Finish		
Description	This case will be used to test all fields and sections. -sc		

**Description Information**

Subject: A short description of the case

Description: Details regarding the issue or question.

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### 10.6 Program

The Program field identifies the programs related to the case.

**Note:** If the question/concern is not specific to a program, leave this field set to --None--.

### Additional Information

Status	New	Program	Coordinated
Priority	Medium		
Case Origin	Phone		
Subject	Test Case: Start-To-Finish		
Description	This case will be used to test all fields and sections. -sc		

**Additional Information**

Status:    
Priority: Medium  
Case Origin:

Program:   
EmPower  
AHPwES/HPwES  
Coordinated  
Market Rate  
PSEG

**Description Information**

### Program Options:

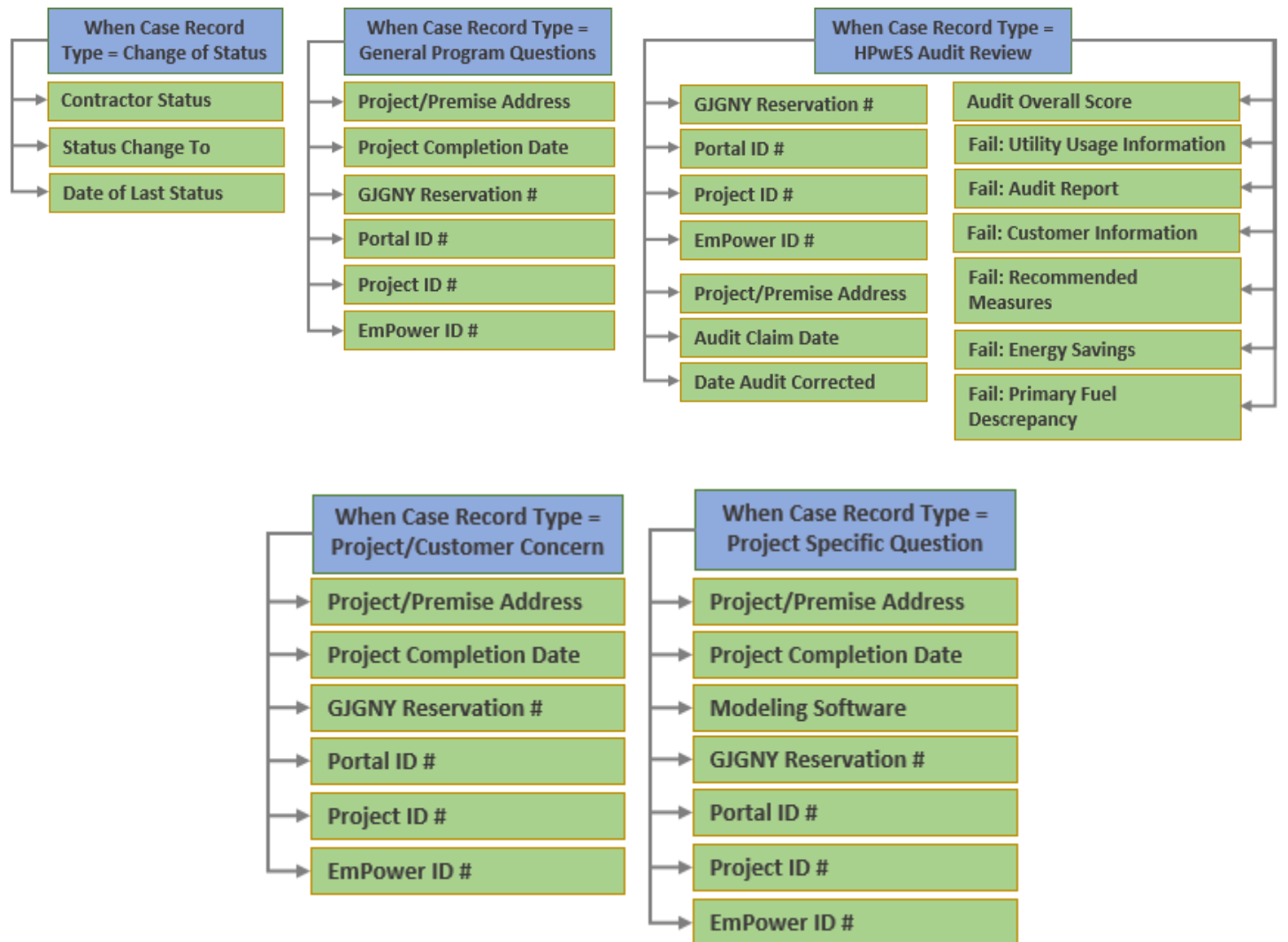
1. **EmPower:** The case is related to the low-income component of the NY Residential Existing Homes Programs – EmPower New York.
2. **AHPwES/HPwES:** The case is related to the moderate-to-higher income components of the NY Residential Existing Homes Programs – Assisted Home Performance with ENERGY STAR and Home Performance with ENERGY STAR.
3. **Coordinated:** The case involves both EmPower and AHPwES programs.
4. **Market Rate:** The project is market rate but may have offered some services through NYSEKDA (e.g., low-interest loan).
5. **PSEG:** The case is related to a Public Service Enterprise Group (PSEG) loan-only project.

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# Section 11: Residential Information Case Section

Residential Information is the third section of the case and contains additional fields that are specific to the Case Record Type selected. To understand which fields are available with each Case Record Type, the following charts have been provided. Each chart shows the Case Record Type in blue and its corresponding, available fields in green.

Case Record Type	Case Record Type determines which fields are available in the Residential Information section of the case.
Field	Fields available on the case.



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## 11.1 Fields

### 11.1.1 Contractor Status

The Contractor Status field indicates the current participation status of the contractor in the program (e.g., provisional, full, etc.).

<b>Subject</b>	Provisional to Full		
<b>Description</b>	Move Residential Test Account from provisional participation status to full effective January 2, 2018.		
<b>Residential Information</b>			
<b>Contractor Status</b>	Provisional	<b>Date of Last Status Change</b>	9/1/2017
<b>Status Change To</b>	Full		

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### 11.1.2 Status Change To Field

The Status Change To field indicates the participation status the contractor is changing to in the program (e.g., provisional, full, etc.).

<b>Subject</b>	Provisional to Full		
<b>Description</b>	Move Residential Test Account from provisional participation status to full effective January 2, 2018.		
<b>Residential Information</b>			
<b>Contractor Status</b>	Provisional	<b>Date of Last Status Change</b>	9/1/2017
<b>Status Change To</b>	Full		

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### 11.1.3 Date of Last Status Change

The Date of Last Status Change field indicates the date the participating contractor achieved the status indicated in the Contractor Status field (current participation status in the program).

<b>Subject</b>	Provisional to Full		
<b>Description</b>	Move Residential Test Account from provisional participation status to full effective January 2, 2018.		
<b>Residential Information</b>			
<b>Contractor Status</b>	Provisional	<b>Date of Last Status Change</b>	9/1/2017
<b>Status Change To</b>	Full		

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### 11.1.4 Project/Premise Address

The Project/Premise Address field is used to document the physical location of the project receiving service.

<b>Residential Information</b>			
<b>Project/Premise Address</b>	17 My Way Albany, NY 12203	<b>GJGNY Reservation #</b>	
<b>Project Completion Date</b>	11/10/2017	<b>Portal ID #</b>	12345
		<b>Project ID #</b>	
		<b>EmPower ID #</b>	D0123456789

<b>Residential Information</b>			
<b>Project/Premise Address</b>	17 My Way Albany, NY 12203	<b>GJGNY Reservation #</b>	<input type="text"/>
<b>Project Completion Date</b>	11/10/2017 [ 12/8/2017 ]	<b>Portal ID #</b>	12345
		<b>Project ID #</b>	<input type="text"/>
		<b>EmPower ID #</b>	D0123456789

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### 11.1.5 Project Completion Date

The Project Completion Date field documents the day the program received all completion paperwork and the project was closed in the NY HP Portal.

<b>Residential Information</b>			
<b>Project/Premise Address</b>	17 My Way Albany, NY 12203	<b>GJGNY Reservation #</b>	
<b>Project Completion Date</b>	11/10/2017	<b>Portal ID #</b>	12345
		<b>Project ID #</b>	
		<b>EmPower ID #</b>	D0123456789

Residential Information	
Project/Premise Address	17 My Way Albany, NY 12203
Project Completion Date	11/10/2017 [ 12/8/2017 ]
GJGNY Reservation #	
Portal ID #	12345
Project ID #	
EmPower ID #	D0123456789

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### 11.1.6 Project ID Number Fields

1. **GJGNY Reservation #:** The unique identifier assigned to a customer when signing up for a free or reduced rate energy audit.
2. **Portal ID #:** The unique identifier assigned to a project when the project is entered in the NY HP Portal.
3. **Project ID #:** The unique identifier assigned to a project when the project was entered into HUB. HUB has been retired so this applies only to older projects. All new projects have a portal ID from the NY HP Portal.
4. **EmPower ID #:** The unique identifier assigned to a project when the project was entered into the legacy EmPower database. The EmPower database is retired so this applies only to older projects. All new projects have a portal ID from the NY HP Portal.

Residential Information	
Project/Premise Address	17 My Way Albany, NY 12203
Project Completion Date	11/10/2017
GJGNY Reservation #	
Portal ID #	12345
Project ID #	
EmPower ID #	D0123456789

Residential Information	
Project/Premise Address	17 My Way Albany, NY 12203
Project Completion Date	11/10/2017 [ 12/8/2017 ]
GJGNY Reservation #	
Portal ID #	12345
Project ID #	
EmPower ID #	D0123456789

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### 11.1.7 HPwES Audit Correction Fields

1. **Audit Claim Date:** The date the incentive was claimed by the participating contractor.



2. **Date Audit Corrected:** The date the participating contractor corrected the audit issue found during the quality review.
3. **Audit QC Overall Score:** The pass/fail score issued to the project that was evaluated against the program’s quality criteria.
4. **Fail: Utility Usage Information:** Indicates that an audit did not pass review against the program’s utility usage criteria. When this box is checked, the participating contractor must submit corrected audit documentation to receive the incentive.
5. **Fail: Audit Report:** Indicates that an audit did not pass review against the program’s audit report criteria. When this box is checked, the participating contractor must submit corrected audit documentation to receive the incentive.
6. **Fail: Customer Information:** Indicates that an audit did not pass review against the program’s customer information criteria. When this box is checked, the participating contractor must submit corrected audit documentation to receive the incentive.
7. **Fail: Recommended Measures:** Indicates that an audit did not pass review against the program’s recommended measures criteria. When this box is checked, the participating contractor must submit corrected audit documentation to receive the incentive.
8. **Fail: Energy Savings:** Indicates that an audit did not pass review against the program’s energy savings criteria. When this box is checked, the participating contractor must submit corrected audit documentation to receive the incentive.
9. **Fail: Primary Fuel Discrepancy:** Indicates that an audit did not pass review against the program’s primary fuel criteria. When this box is checked, the participating contractor must submit corrected audit documentation to receive the incentive.

---

### Residential Information

GJGNY Reservation #		Audit QC Overall Score	Fail
Portal ID #	123456	Fail Utility Usage Information	<input checked="" type="checkbox"/>
Project ID #		Fail Audit Report	<input type="checkbox"/>
EmPower ID #		Fail Customer Info	<input type="checkbox"/>
Project/Premise Address	17 My Way Albany, NY 12203	Fail Recommended Measures	<input type="checkbox"/>
Audit Claim Date	12/19/2017	Fail Energy Savings	<input type="checkbox"/>
Date Audit Corrected		Fail Primary Fuel Discrepancy	<input type="checkbox"/>

---

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#### 11.1.8 Other Project Specific Fields

1. **Modeling Software:** Documents the software used by the participating contractor to calculate energy savings and savings-to-investment ratios. Options available are Auditor, GreenPro, OptiMiser, Quick Audit Tool, RHA, SnuggPro, TREAT, Cake, EmPCalc, and Other.

**Residential Information**

Project/Premise Address

Project Completion Date

**Modeling Software**

Auditor  
GreenPro  
OptiMiser  
Quick Audit Tool  
RHA  
SnuggPro  
TREAT  
Cake  
EmPCalc  
Other

GJGNY Reservation #

Portal ID #

Project ID #

EmPower ID #

Submit Save & Close Save & New Cancel

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## Section 12: System Information Case Section

The System Information section of the case contains basic system-related information regarding the case, including who created or modified the case and when.

**System Information**

Created By	<a href="#">Sherri Calabrese</a> , 11/6/2017 4:26 PM	Last Modified By	<a href="#">Sherri Calabrese</a> , 1/4/2018 4:33 PM
Date/Time Opened	11/6/2017 4:26 PM	Date/Time Closed	

1. **Created By:** Documents who created the case including a date and time stamp of when the case was created.
2. **Date/Time Opened:** Documents the date and time the case was created.
3. **Last Modified By:** Documents who last modified the case and includes a date and time stamp of when the edit occurred.
4. **Date/Time Closed:** Documents the date and time the case was closed or resolved.

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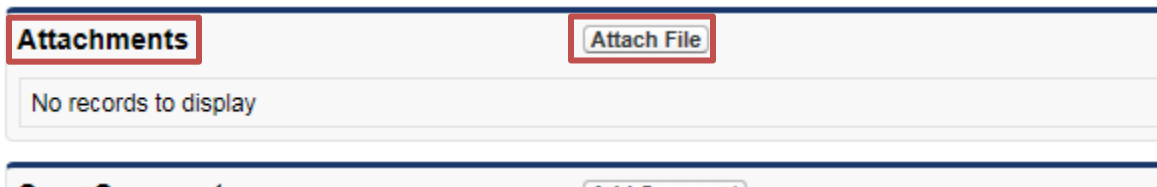
## Section 13: Attachments

Attaching documents to cases can be accomplished in two ways: (1) in the Attachments section of a case on the Details tab and (2) from the Feed tab.

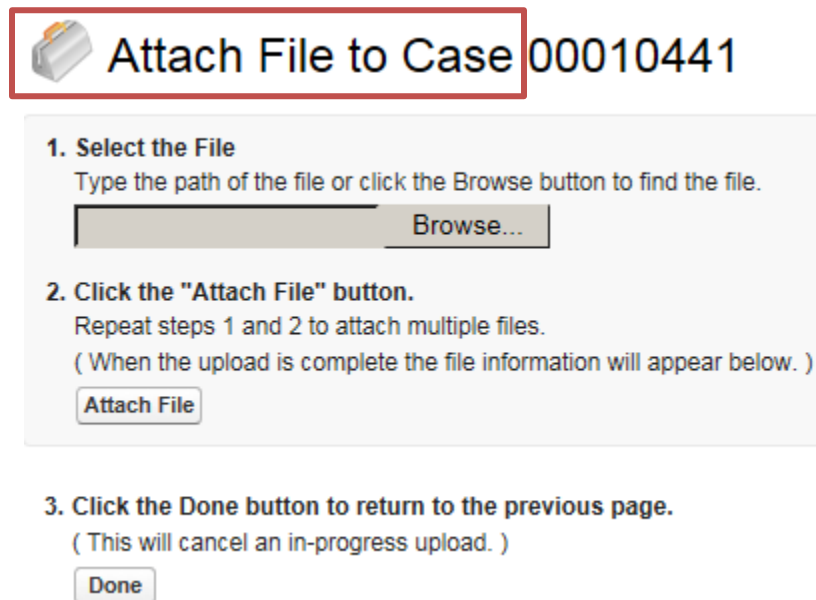
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## 13.1 Attaching Documents in the Attachments Section

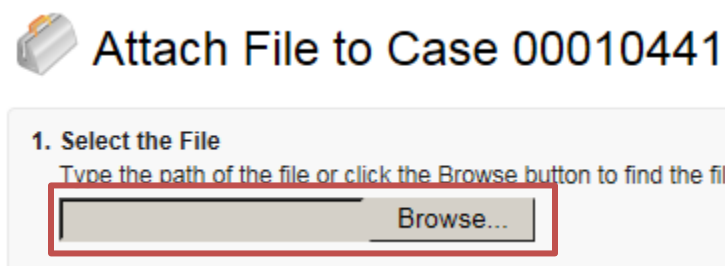
To attach documents to the case from the Attachments section, click the Attach File button in the Attachments section.

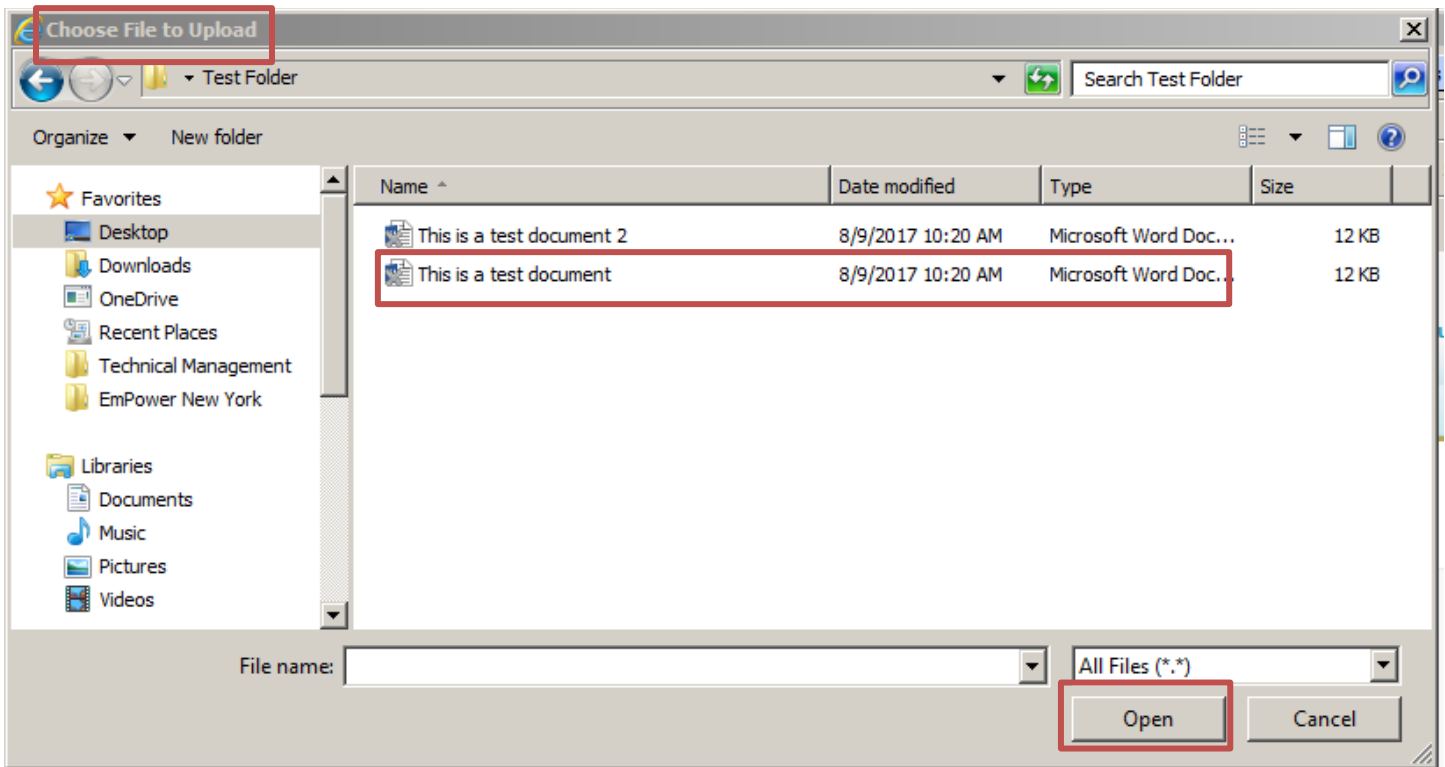


Clicking the Attach File button opens the Attach File to Case page. Attaching a file to the case is a three-step process: locate the file to be attached, attach the file, and return to the case.



1. To locate the file to be attached to the case, click the Browse... button, which opens the file manager. Navigate to the file, select, and click the open button.





2. Next, click the Attach File button to attach the file selected during step 1.

## Attach File to Case 00010441

**1. Select the File**  
Type the path of the file or click the Browse button to find the file.

**2. Click the "Attach File" button.**  
Repeat steps 1 and 2 to attach multiple files.  
( When the upload is complete the file information will appear below. )

Clicking the Attach File button displays a message confirming the file has been uploaded.

## Attach File

### 1. Select the File

Type the path of the file or click the Browse button to find the file.

### 2. Click the "Attach File" button.

Repeat steps 1 and 2 to attach multiple files.

( When the upload is complete the file information will appear below. )

### 3. Click the Done button to return to the previous page.

( This will cancel an in-progress upload. )

You have just uploaded the following file

File Name	This is a test document.docx
Size	11KB

3. After the file has been uploaded, either attach another document by going back to the Browse... button and following the first two steps or selecting the Done button to return to the case.

## Attach File

### 1. Select the File

Type the path of the file or click the Browse button to find the file.

### 2. Click the "Attach File" button.

Repeat steps 1 and 2 to attach multiple files.

( When the upload is complete the file information will appear below. )

### 3. Click the Done button to return to the previous page.

( This will cancel an in-progress upload. )

You have just uploaded the following file

File Name	This is a test document.docx
Size	11KB

The uploaded document(s) now appear in the Attachments section.

Attachments					
Action	File Name	Size	Last Modified	Created By	
<a href="#">Download</a>   <a href="#">Del</a>	<a href="#">This is a test document</a>	11KB	11/10/2017 10:53 AM	<a href="#">Sherri Calabrese</a>	
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	<a href="#">This is a test document.docx</a>	11KB	11/10/2017 10:17 AM	<a href="#">Sherri Calabrese</a>	
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	<a href="#">This is a test document.docx</a>	11KB	11/10/2017 10:15 AM	<a href="#">Sherri Calabrese</a>	

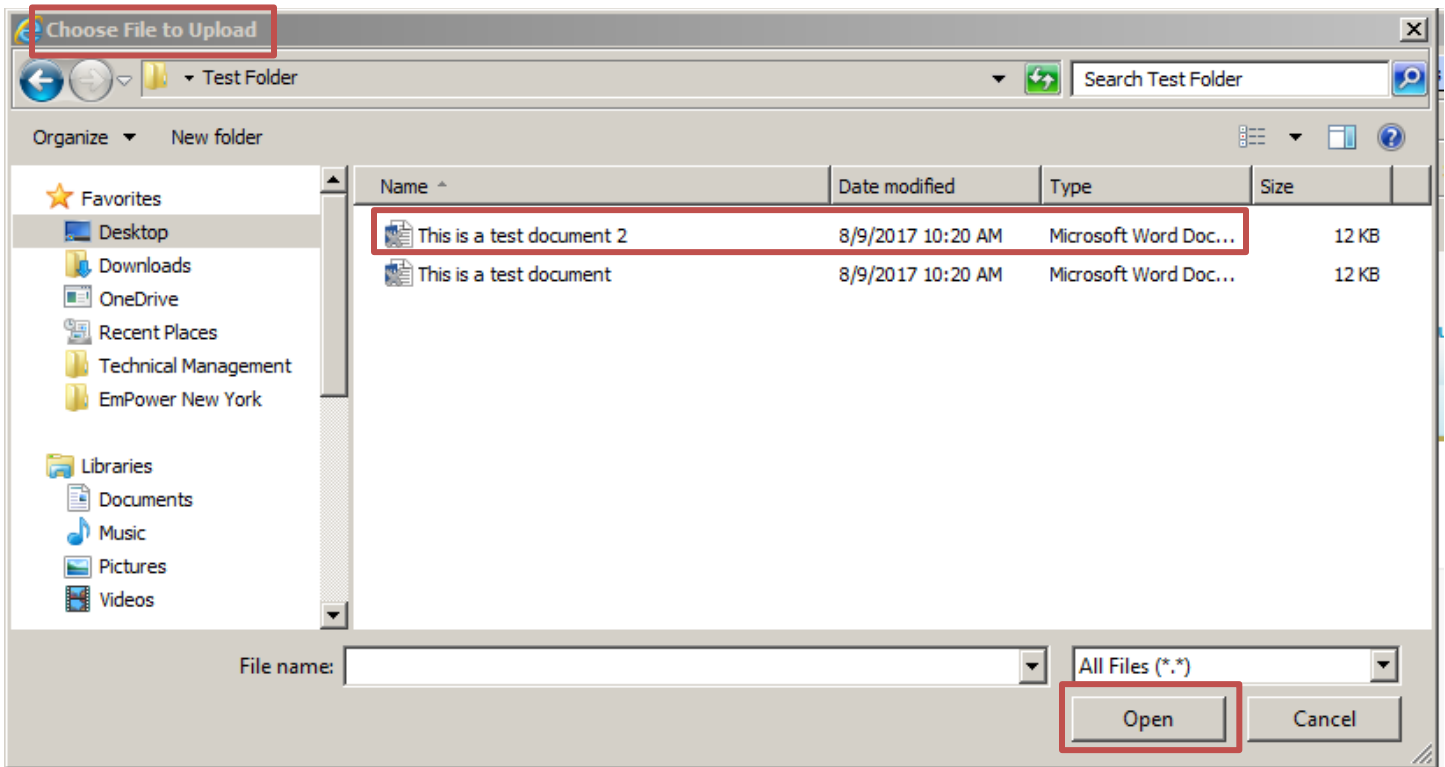
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## 13.2 Attaching Documents in the Feed

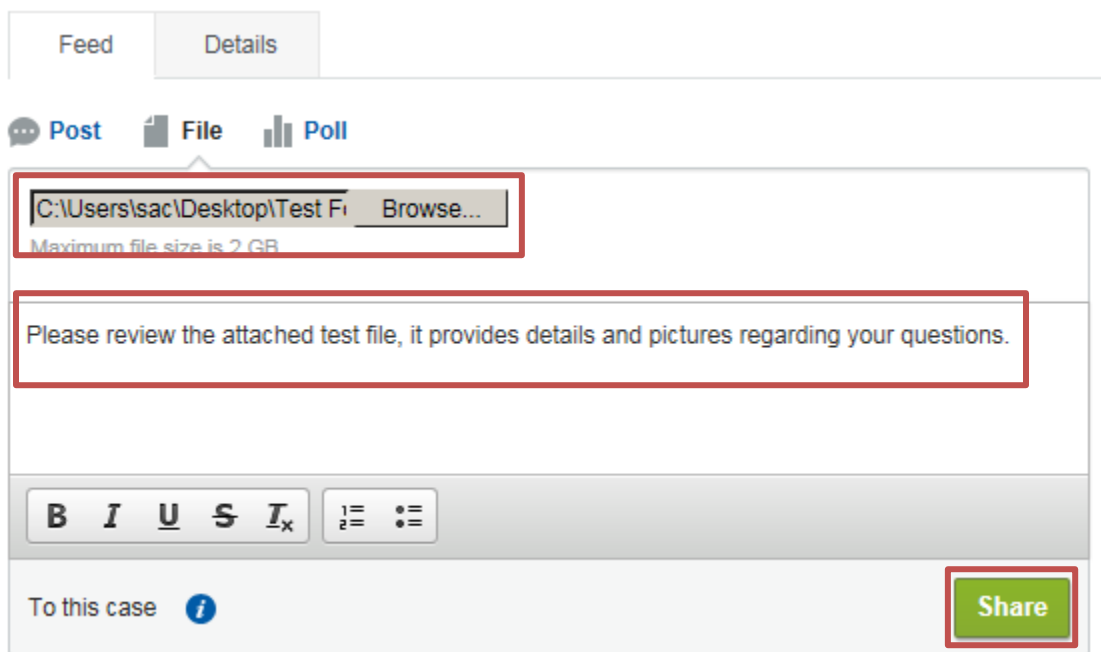
To attachment documents through the feed, click on the Feed tab of a case and then File. Selecting File expands the dialog box to include the Browse... button.

The screenshot shows a dialog box for attaching a file. At the top, there are two tabs: 'Feed' (selected) and 'Details'. Below the tabs are three options: 'Post', 'File' (selected), and 'Poll'. The 'File' option is highlighted with a red box. Below the options is a large text input field with a 'Browse...' button on the right, also highlighted with a red box. Below the input field is a text area with the placeholder text 'Say something about this file...'. At the bottom of the dialog, there is a rich text editor with buttons for Bold (B), Italic (I), Underline (U), Strikethrough (A), and Text Color (T), along with list and link icons. At the very bottom, there is a 'To this case' label with an information icon and a 'Share' button.

Selecting the Browse... button opens the file manager. Navigate to the file to be attached. Select and click the Open button.



Clicking the Open button adds the file to the feed post. Additional information can be shared with the case in the “Say something about this file...” dialog box. Click the Share button to post to the feed.



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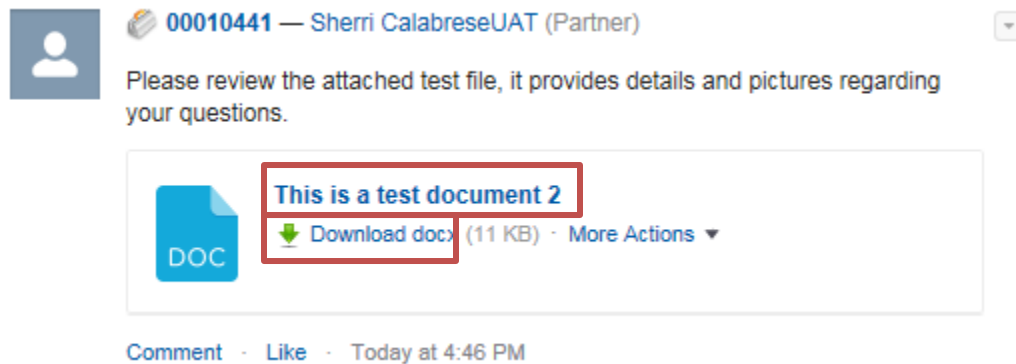
## 13.3 Opening Attachments

Attachments can be opened either from the Feed or from the Attachments section of the case.

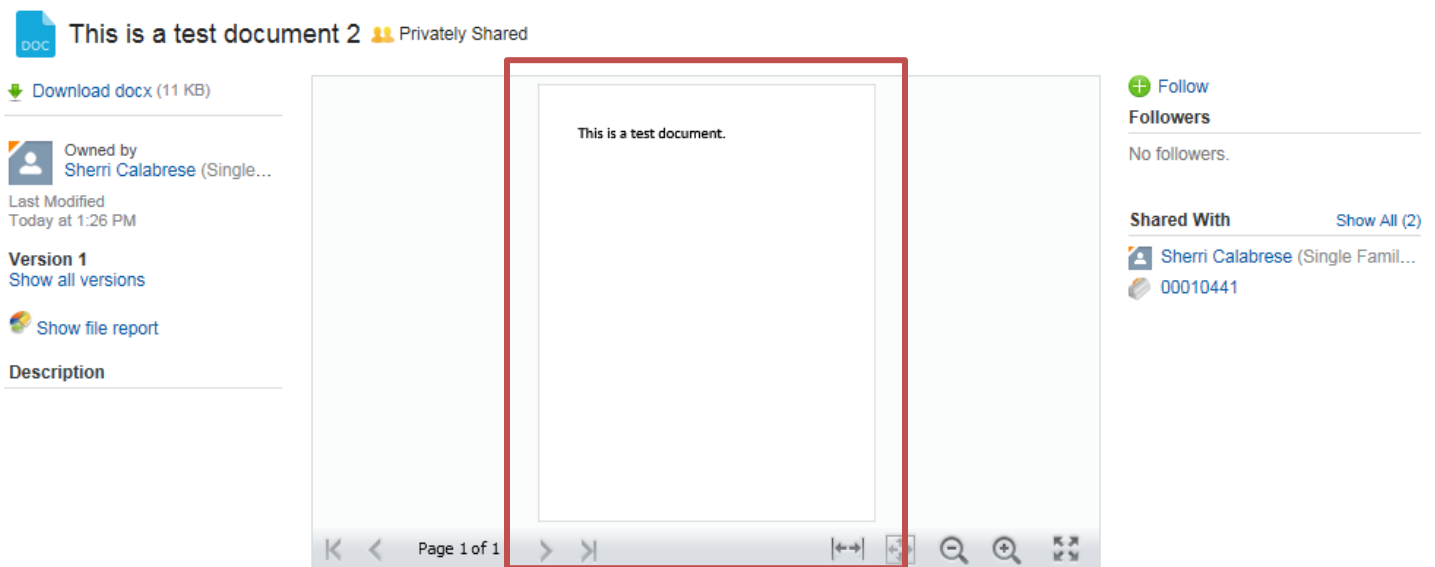
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### 13.3.1 Opening an Attachment from the Feed

To open an attachment from the feed post, navigate to the appropriate post and either click the file title link or select the Download link.

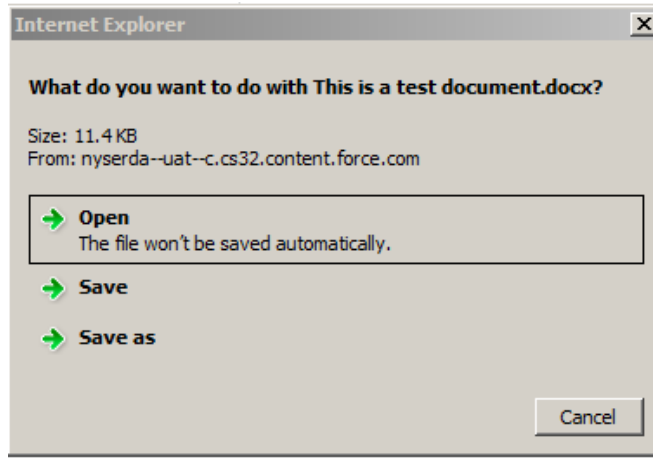


Clicking the file title link opens the preview page where the user can view the document.



Clicking the Download link opens the options for downloading the file.





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### 13.3.2 Opening an Attachment from the Attachments Section

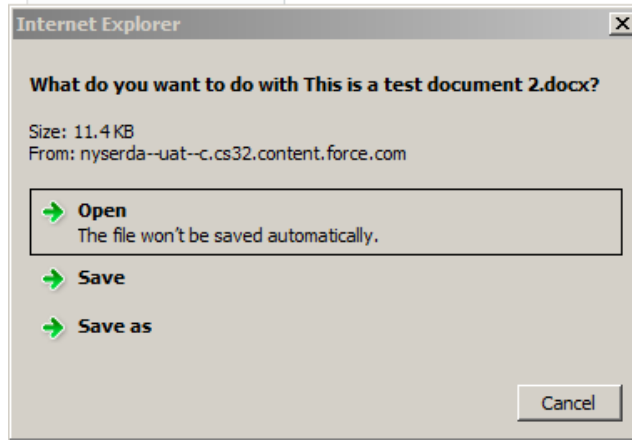
From the Details tab, navigate to the Attachments section. Either click on the File Name link or the Download link.

Attachments				
<a href="#">Attach File</a> <a href="#">View All</a>				
Action	File Name	Size	Last Modified	Created By
<a href="#">Download</a>   <a href="#">Del</a>	<a href="#">This is a test document 2</a>	11KB	1/4/2018 4:46 PM	<a href="#">Sherri CalabreseUAT</a>
<a href="#">Download</a>   <a href="#">Del</a>	<a href="#">This is a test document</a>	11KB	11/10/2017 10:53 AM	<a href="#">Sherri Calabrese</a>

Clicking the file title link opens the preview page where the user can view the document.

A document preview page for "This is a test document" (11 KB). The document content is "This is a test document." The page includes a "Download docx (11 KB)" link, ownership information for Sherri Calabrese, and a "Shared With" list containing Sherri Calabrese and user 00010441. The document is marked as "Privately Shared".

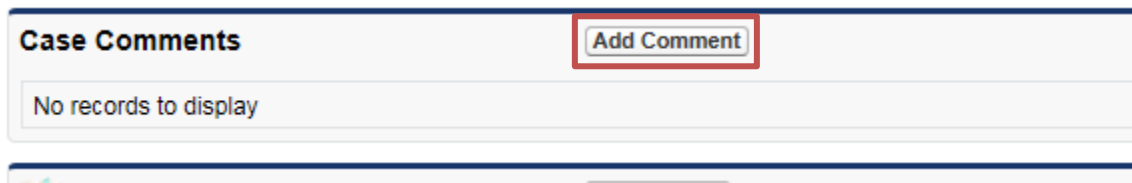
Selecting the Download link opens the download options.



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## Section 14: Case Comments

The Case Comments section of the case is an area for posting updates and/or notes related to the case. To post a case comment, navigate to the Case Comments section and click the Add Comment button.



Clicking the Add Comment button opens the Case Comment Edit page. From the Case Comment Edit page, type information into the Comment box. Click Save.

**Case Comment Edit**

**Case Details**

Subject	Customer Concern
Description	This case will be used to test all fields and sections. -sc

**Comment Details**

Comment

Clicking the Save button posts the comment to the Case Comments section of the case.

**Case Comments**

Comment

**Created By: [Sherri CalabreseUAT](#) (1/8/2018 4:21 PM)**  
I misspoke, the appointment is on 1/22/2018. ~Sherri

**Created By: [Sherri CalabreseUAT](#) (1/4/2018 5:02 PM)**  
I spoke with the customer, they are ready to move forward with the next steps. We have an appointment on 1/21/2018. ~Sherri

**Created By: [Sherri CalabreseUAT](#) (1/4/2018 4:33 PM)**  
Test comment applied to case.

Case Comment history appears at the bottom of the Case Comment Edit page for reference when drafting new comments.

**Case Comment Edit**

**Case Details**

Subject	Customer Concern
Description	This case will be used to test all fields and sections. -sc

**Comment Details**

Comment

^  
v

**Case Comments**

Comment

**Created By: Sherri CalabreseUAT (1/4/2018 5:02 PM)**  
 I spoke with the customer, they are ready to move forward with the next steps. We have an appointment on 1/21/2018. ~Sherri

**Note:** Case comments are not editable once they are posted. If a mistake is made, post a new comment with corrected information.

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## Section 15: Activities

When there is activity accompanying the case, it is shown in either the Open Activities or the Activity History sections. The Open Activities section displays activities associated with the case that have not yet been completed or responded to and the Activity History section displays the case's activities that have been completed.

**Note:** If the Open Activities or Activity History sections do not appear on a case, the case does not have any related activities.

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### 15.1 Tasks

Open tasks on a case are in the Open Activities section. In this example, a task has been assigned to reach out to the customer with a due date of 1/12/18 and was assigned to Sherri CalabreseUAT. Tasks on a case are actions that should be taken. Tasks can be assigned to any user associated with the participating contractor. To see additional details regarding the task, click on the Subject link.

Open Activities									
Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To	Create Date	Last Modified Date/Time
	<a href="#">Reach out to customer to schedule an appointment.</a>	Test Contact	✓	1/12/2018	Open	Normal	Sherri CalabreseUAT	1/4/2018	1/4/2018 5:10 PM

Clicking the Subject link opens the Task page to the details associated with the task. To navigate back to the case from the Task page, either click the back button or click on the Related To link.

Task **Reach out to customer to schedule an appointment.**

1 7 31

### Task Detail

**Task Information**

Assigned To	<a href="#">Sherri CalabreseUAT</a>	Due Date	1/12/2018
Subject	Reach out to customer to schedule an appointment.	Related To	<a href="#">00010441</a>
Type		Name	<a href="#">Test Contact</a>
Read Email	<a href="#">Click here</a>	Phone	111-111-1111
Comments	The customer called contractor support indicating that they have been waiting to hear back regarding an appointment time. Please reach out.		
Priority	Normal	Email	<a href="mailto:sherri.calabrese@nyscrda.ny.gov">sherri.calabrese@nyscrda.ny.gov</a>
Status	Open		

When the task is completed, the user posts an update to the Case Comments (See Section 14: [Case Comments](#)) or attaches required documents (See Section 13: [Attachments](#)) to the case. The Case Owner receives the update, marks the task as complete if there are no further actions needed, and the task moves to the Activity History section.

Activity History						
Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
	<a href="#">Reach out to customer to schedule an appointment.</a>	<a href="#">Test Contact</a>	✓	1/12/2018	<a href="#">Sherri CalabreseUAT</a>	1/8/2018 4:36 PM

When tasks are overdue, the assignee receives a notification in the NYSERDA portal (pop-ups must be enabled).

https://nyserda--uat.cs33.my.salesforce.com/?at=1510340101926 - 5 Reminders - Int...

**Test 2: Complete this also**

Due Date: None  
 Reminder Time: 11/10/2017 8:00 AM  
 Related To: 00010470

<input type="checkbox"/>	Type	Subject	Reminder
<input type="checkbox"/>		<a href="#">Test 1: Please complete</a>	5 hours overdue
<input type="checkbox"/>		<a href="#">Test 2: Complete this also</a>	5 hours overdue
<input type="checkbox"/>		<a href="#">Test 3: Help</a>	5 hours overdue
<input type="checkbox"/>		<a href="#">Test Case Owner Change</a>	2 days overdue
<input type="checkbox"/>		<a href="#">This task needs to be done ASAP</a>	2 days overdue

Dismiss Dismiss All 5 minutes Snooze

From the reminder box, select the Subject link to open the Task Detail page.

Task Help for t

**Draft letter for review.**

Click to add topics: ?

1 7 31

Attachments (0)

**Task Detail** Edit Delete Create Follow-Up Task Create Follow-Up Event

▼ Task Information

Assigned To	<a href="#">Sherri Calabrese</a>	Due Date	9/20/2017
Subject	Draft letter for review.	Related To	<a href="#">00008864</a>
Type		Name	
Read Email	<a href="#">Click here</a>	Phone	
Comments		Email	
Priority	Normal		
Status	Open		

▼ Related To

Project Triage Task -

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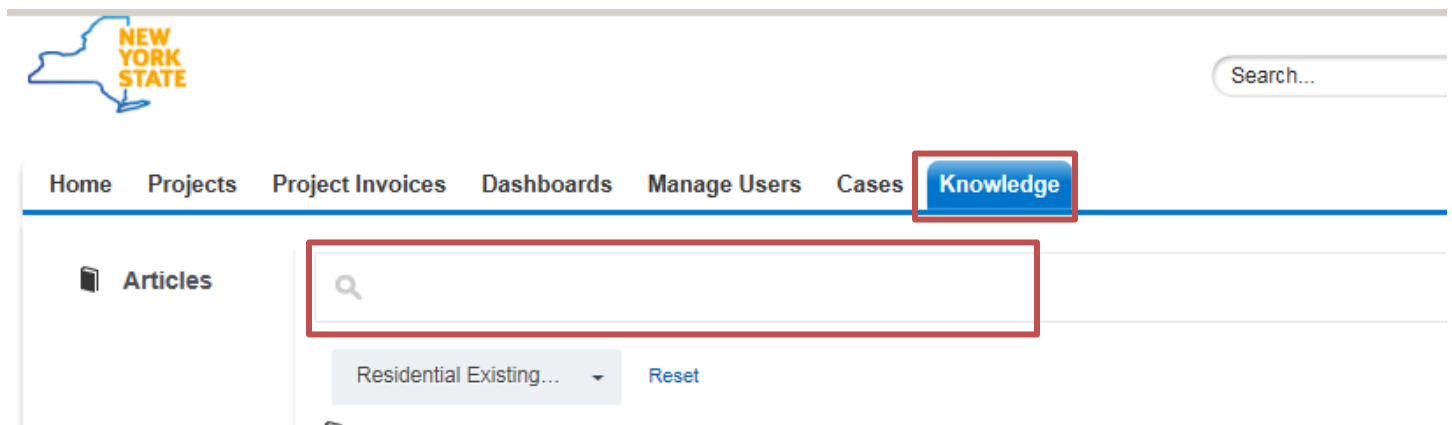
## Section 16: Knowledge

Knowledge articles are developed by the program over time to help address frequently asked questions. Participating contractors are encouraged to search the Knowledge section prior to submitting a case for answers to their questions. Articles can be accessed directly from the Knowledge tab or via a case in the Articles section.

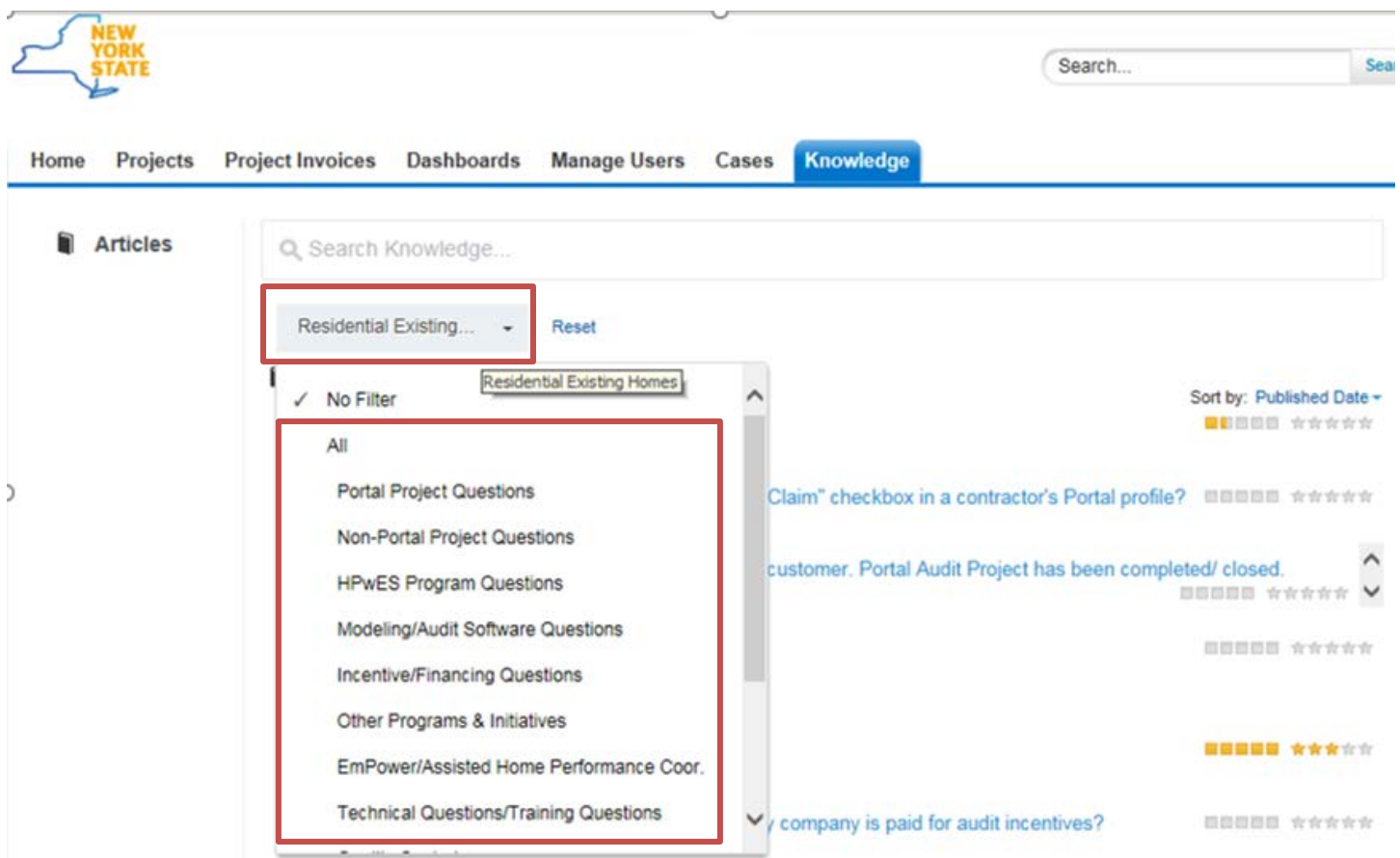
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## 16.1 Searching Articles with the Knowledge Tab

To access the Knowledge articles, click on the Knowledge tab.



Click on the Residential Existing Homes dropdown box for a menu of topics.



To search for an article, type keywords into the Search box.

 **Articles**

Residential Existing...

 **Articles**

In this example, the keyword “test” returned two articles.

 **Articles**

Residential Existing...

 **Articles**

[TEst 2](#)

**Test2 ...**

000001179 • Knowledge • Last Published 11/10/2017

[Another test articles](#)

Article to further test the system. ...

**Updated!** • 000001184 • Knowledge • Last Published 12/20/2017

Click on the title of the article link to open the document.



# What audit information is needed to be sure that my company is paid for audit incentives?

Rate This Article ☆☆☆☆☆ (Average Rating: No Rating)

[« Back to Knowledge Search](#)

**Information**

Article Body

The following information needs to be provided to the Program to ensure that audit incentive paymer energy audit submissions. Per Section 8.04 of the Partnership Agreement, the Comprehensive Home calendar days of the site visit audit completion.

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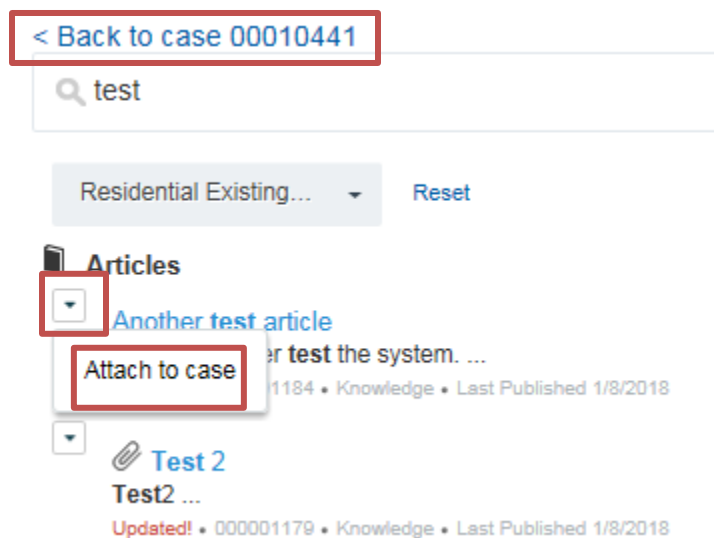
## 16.2 Searching for and Attaching Articles to Cases

Articles can be searched for within a case, and then attached in the Articles section of the Details tab. To attach an article from the Articles section of the Details tab, click the Find Articles button.



Clicking the Find Articles button opens the Articles page. From the Articles page, type the keyword(s) into the Search box or select a topic from the Residential Existing Homes menu (See Section 16.1 [Searching Articles with the Knowledge tab](#)).

To attach the article, select the down arrow button next to the article and select the Attach to Case option. After attaching all applicable articles, click the Back to case link.



The article is now attached to the case.

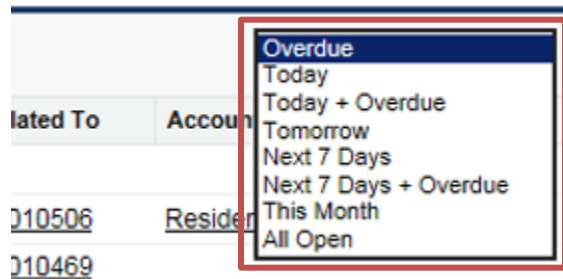


## 17.1 My Tasks

A full list of open tasks assigned to the user can be viewed from the Home page by scrolling down to the My Tasks section. My Tasks default to tasks that are Overdue.

Complete	Date	Status	Subject	Name	Related To	Account
		Open	<a href="#">Test Task to a Contractor</a>			
12/22/2017		Open	<a href="#">Smith: Upload Pictures</a>	<a href="#">Sherri CalabreseUAT</a>	00010506	<a href="#">Residential Test Account</a>
12/22/2017		Open	<a href="#">Review case and upate</a>		00010469	

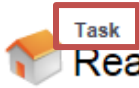
Overdue can be switched to Today, Today + Overdue, Tomorrow, Next 7 Days, Next 7 Days + Overdue, This Month and All Open. Tasks associated with the selected view are then displayed.



In this example, All Open was selected to show all open tasks assigned to the user. To view a task from the My Tasks section, click the Subject link or to navigate to the case the task is associated with, click on the Related To link.

Complete	Date	Status	Subject	Name	Related To	Account
		Open	<a href="#">Test Task to a Contractor</a>			
12/22/2017		Open	<a href="#">Smith: Upload Pictures</a>	<a href="#">Sherri CalabreseUAT</a>	00010506	<a href="#">Residential Test Account</a>
12/22/2017		Open	<a href="#">Review case and upate</a>		00010469	
1/9/2018		Open	<a href="#">Test Task - Please forward to Sherri</a>	<a href="#">Test Contact</a>	00010441	<a href="#">Res Test Account</a>
1/12/2018		Open	<a href="#">Reach out to customer to schedule an appointment.</a>	<a href="#">Test Contact</a>	00010441	<a href="#">Res Test Account</a>
1/17/2018		Open	<a href="#">Testing a Task on a Case</a>		00010227	
1/24/2018		Open	<a href="#">Submit support pictures</a>	<a href="#">Test Contact</a>	00010224	<a href="#">Res Test Account</a>

Clicking the Subject link opens the Task page, which provides additional details for the task. To navigate to the case from the Task page, click on the case number in the Related To field.



## Reach out to customer to schedule an appointment.



### Task Detail

#### Task Information

Assigned To	<a href="#">Sherri CalabreseUAT</a>	Due Date	1/12/2018
Subject	Reach out to customer to schedule an appointment.	Related To	<a href="#">00010441</a>
Type		Name	<a href="#">Test Contact</a>
Read Email	<a href="#">Click here</a>	Phone	111-111-1111
Comments	The customer called contractor support indicating that they have been waiting to hear back regarding an appointment time. Please reach out.	Email	<a href="mailto:sherri.calabrese@nyserda.ny.gov">sherri.calabrese@nyserda.ny.gov</a>
Priority	Normal		
Status	Open		

To update or complete a task, post the required information to the Case by submitting a Case Comment (most common) or uploading an attachment. The Case Owner reviews the newly supplied information and marks the task complete or asks additional questions.

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