NYSERDA Portal User Guide for Participating Contractors

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 ®, 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 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 : 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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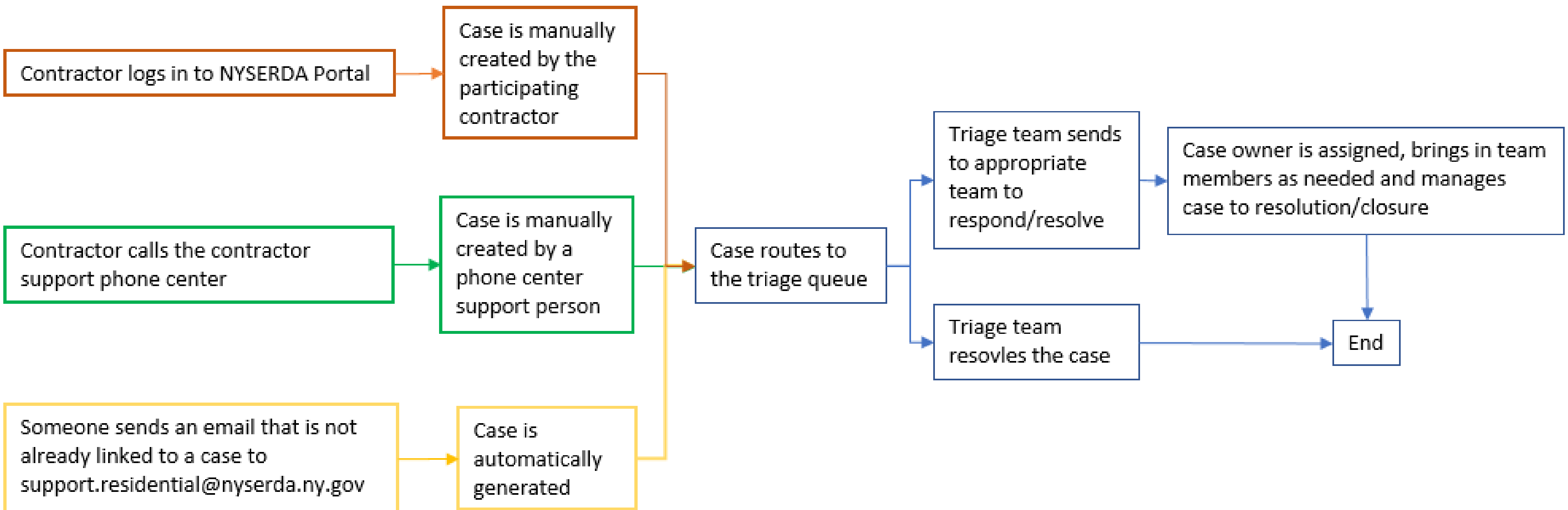
1.2.1 High-Level Process Map



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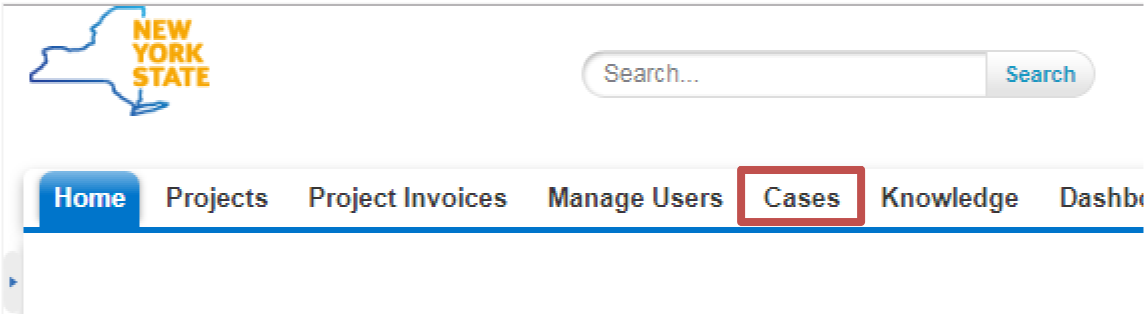
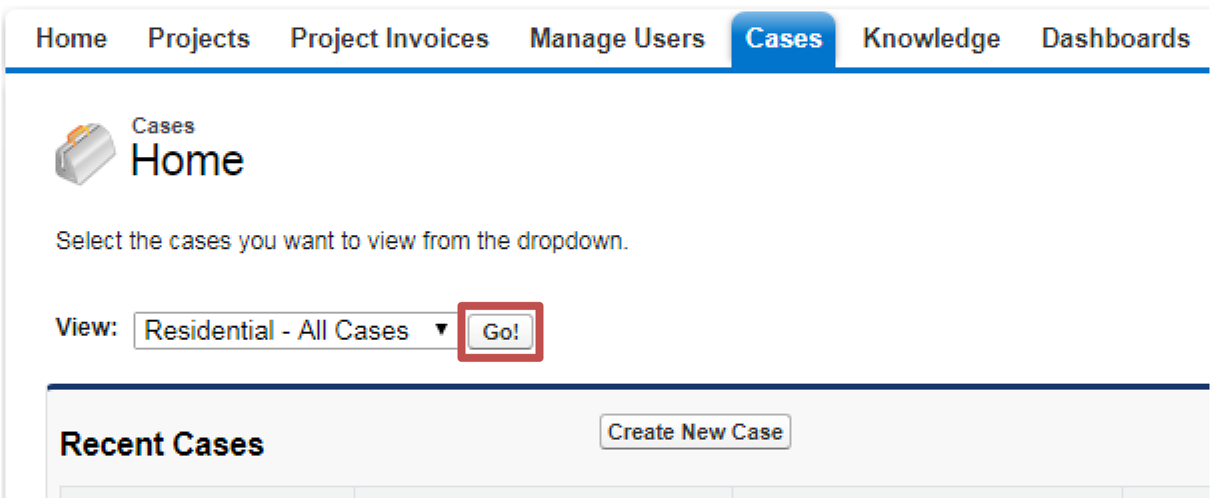
1.3 Quick Start

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.

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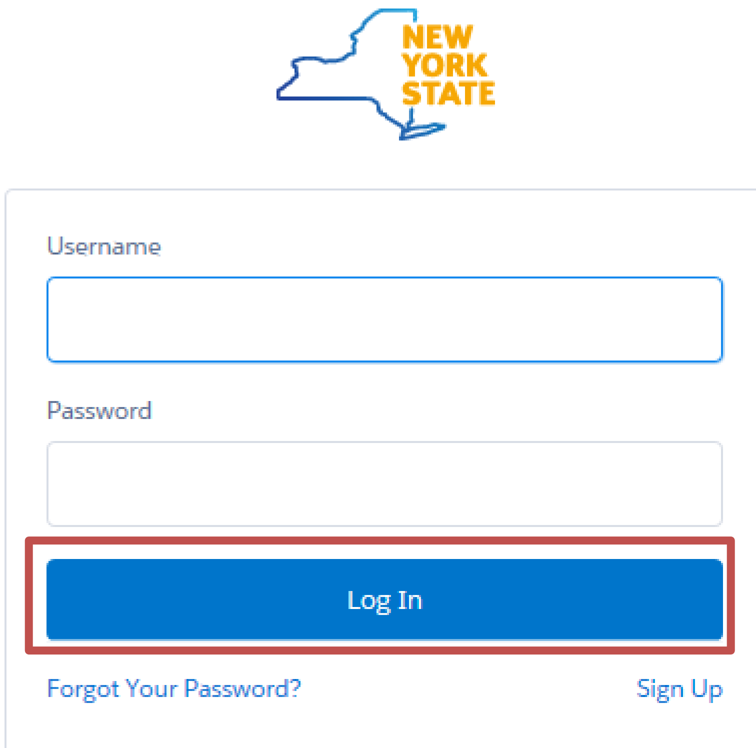
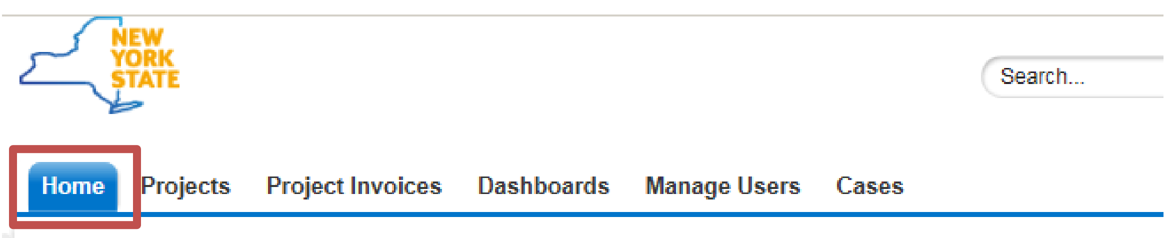
Section 2: Logging In

Participating contractors log in to the NYSERDA 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.



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



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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] On Behalf Of NYSERDA Portal
Sent: Tuesday, January 09, 2018 1:54 PM
To: Houle, Matthew E (NYSERDA) <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.nyserda

To create a new password, visit: https://uat-nyserda-portal.cs33.force.com/secur/forgotpassword.jsp?r=CAAAAWDhbG_rME8wMzUwMDAwMDA0QzlCAAAA0vSOQ1T8PoC0gMOtNFKR2TqHdrGareKpMcd7agI9LmA97ItWKipJO16PiUzyvcJT8j0xFg8O2Pc0uvtLc0FhHCE37axCdan9mUtPaYWEqOIj2OIiU9mYVu-pT1QooP3i3A%3D%3D&display=page&fpot=1a275545-b6d2-472e-94f6-e60d2c3826a3a70145b9-4402-4032-a51f-0aad5d0960ac

Please contact SalesforceSupport@nyserda.ny.gov if you have trouble logging in.

Thanks,
NYSERDA

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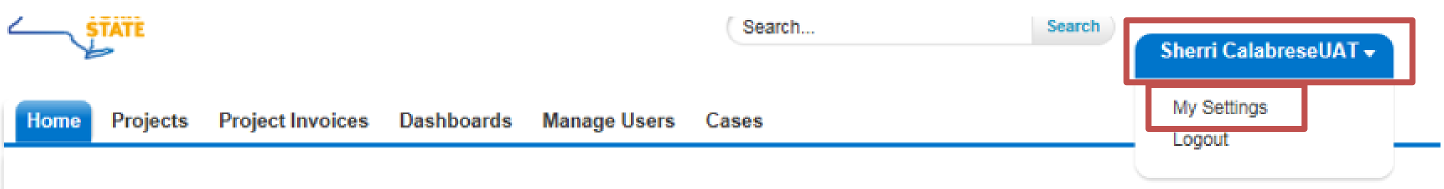
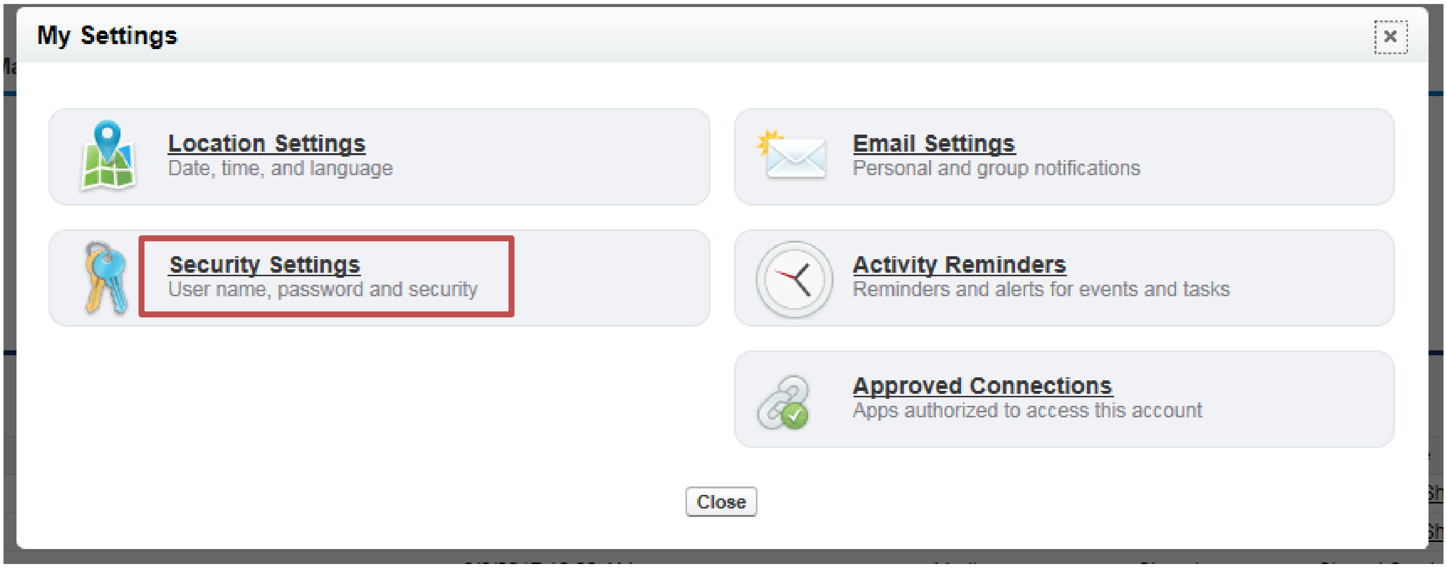
3.1 Updating a Password while Logged in

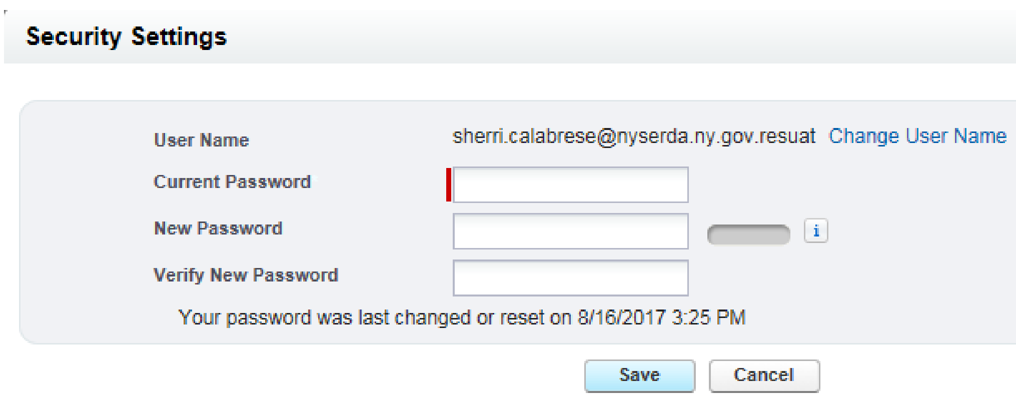
To update a password while logged in to the NYSERDA Portal, click on the user name in the upper right corner, and click on the My Settings option.



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.



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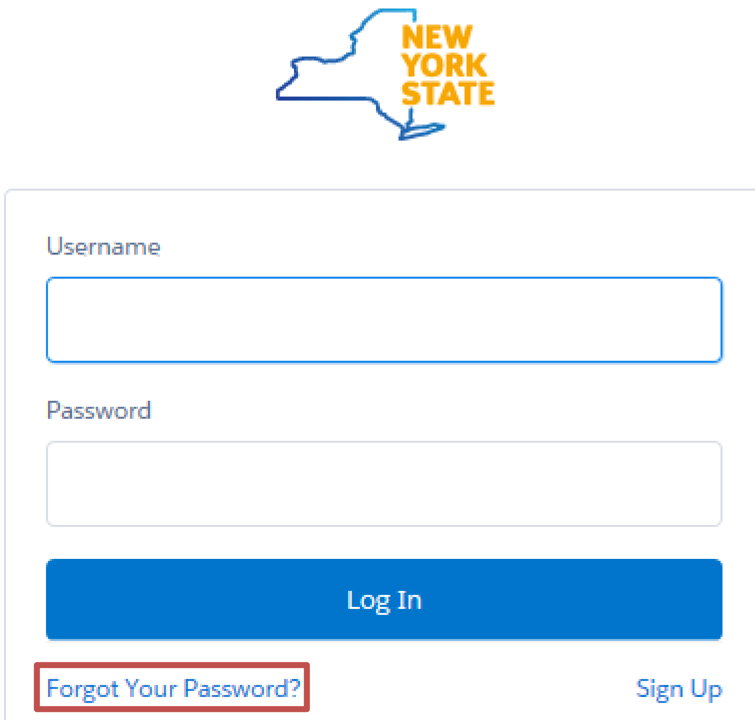
3.2 Forgotten Password

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



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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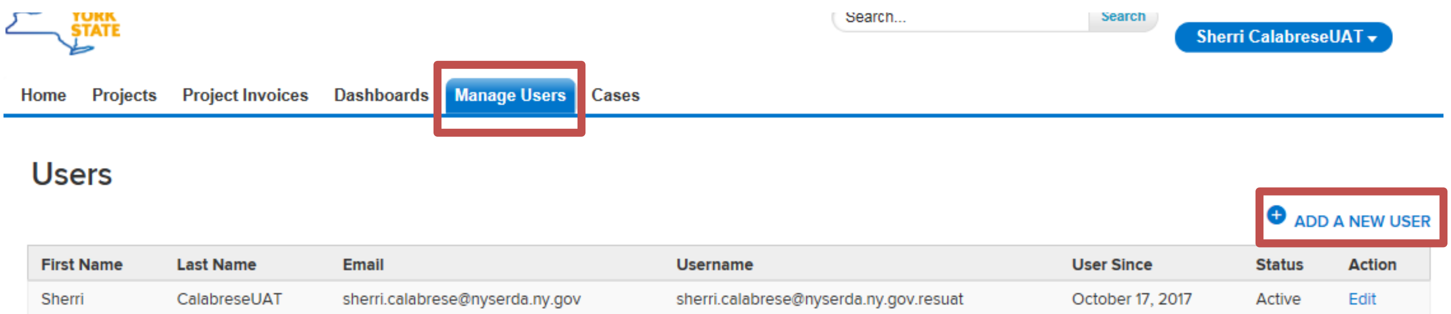
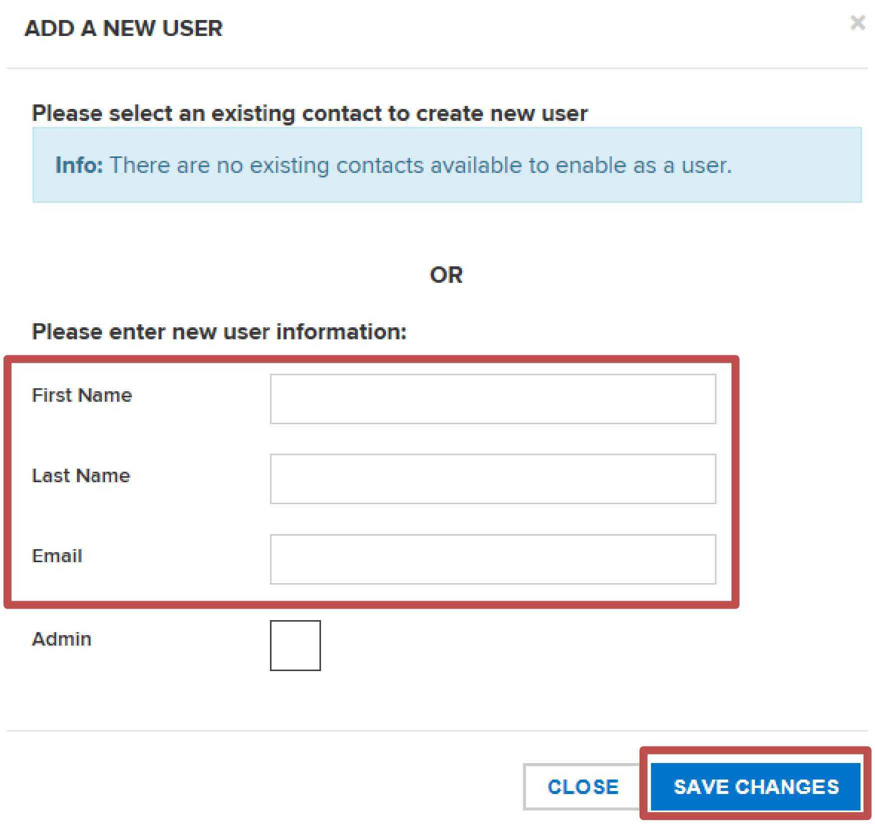
4.1 Adding Users to an Account

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.

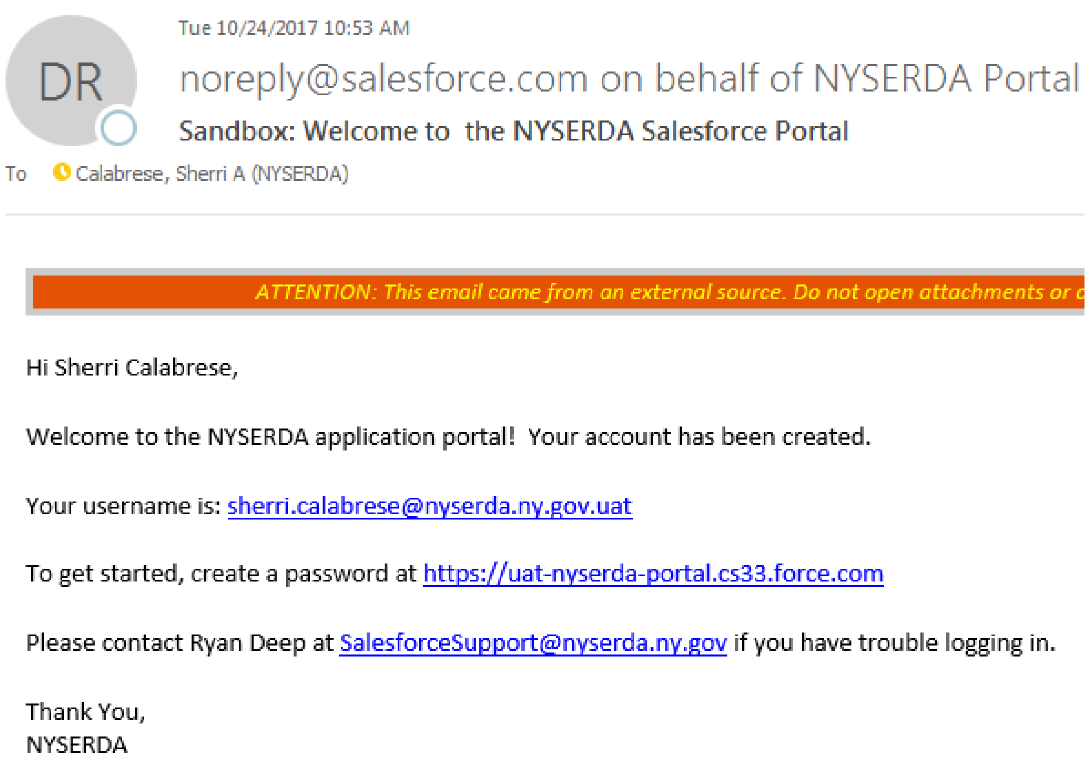
Note: Only administrators have access to the Manager Users tab. If the user cannot access the tab, the user is not an administrator on the account.



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.



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.


DR

Tue 10/24/2017 10:53 AM

noreply@salesforce.com on behalf of NYSERDA Portal

Sandbox: Welcome to the NYSERDA Salesforce Portal

To Calabrese, Sherri A (NYSERDA)

ATTENTION: This email came from an external source. Do not open attachments or c

Hi Sherri Calabrese,

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

Your username is: sherri.calabrese@nyserda.ny.gov.uat

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

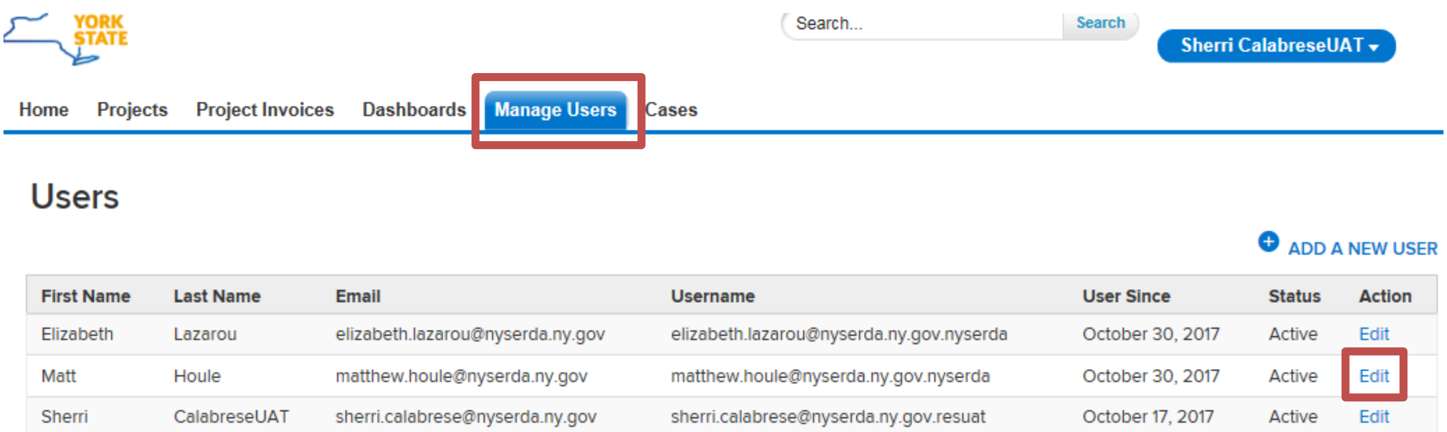
Please contact Ryan Deep at SalesforceSupport@nyserda.ny.gov if you have trouble logging in.

Thank You,
NYSERDA

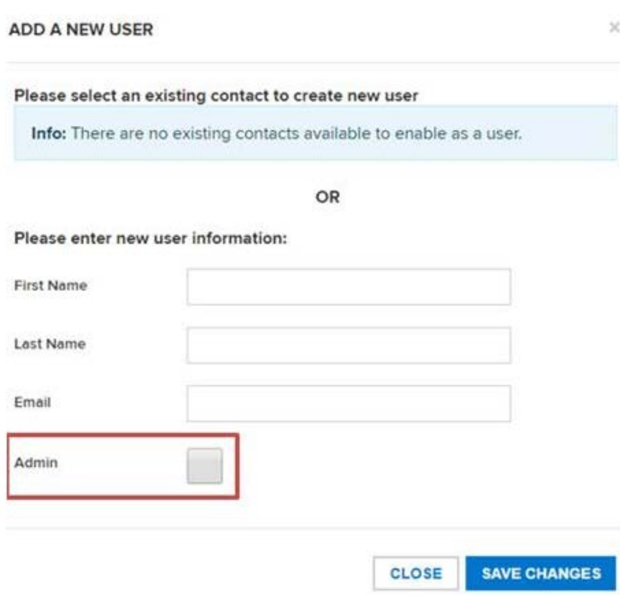
4.2 Deactivating Users from an Account

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.



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.

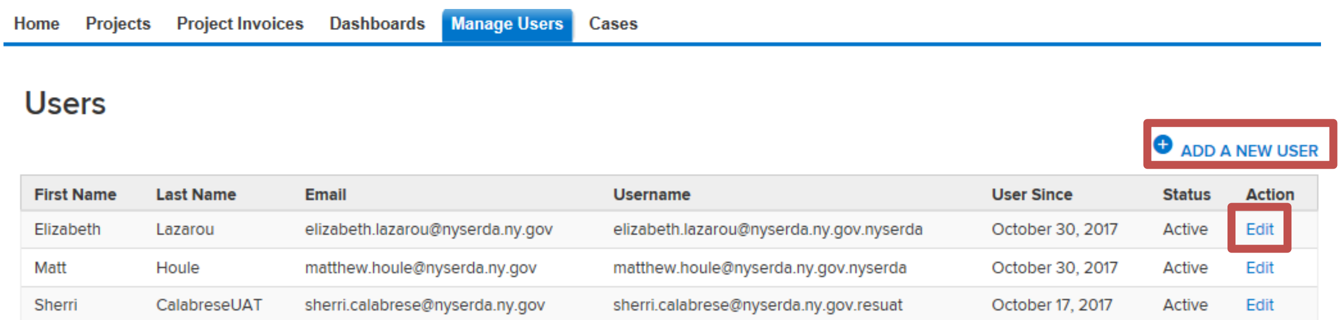


To reactivate a user, navigate to the Manager Users section of the NYSERDA Portal, click on the Edit link, recheck the Active checkbox, and click the Save Changes button.

4.3 Changing the Administrator on an Account

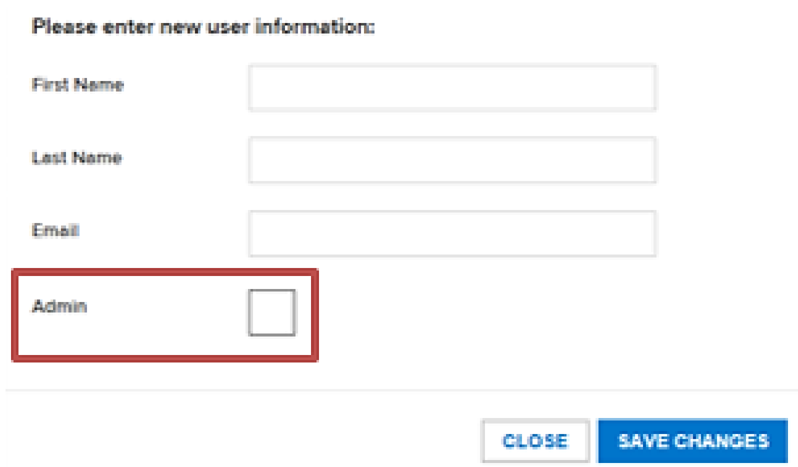
The administrator on a participating contractor's account adds or deactivates users as well as assigns other employees administrative rights, which allow those users to also add or deactivate users on the account. The administrator has two options for adding a secondary administrator:

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.



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.



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.

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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.

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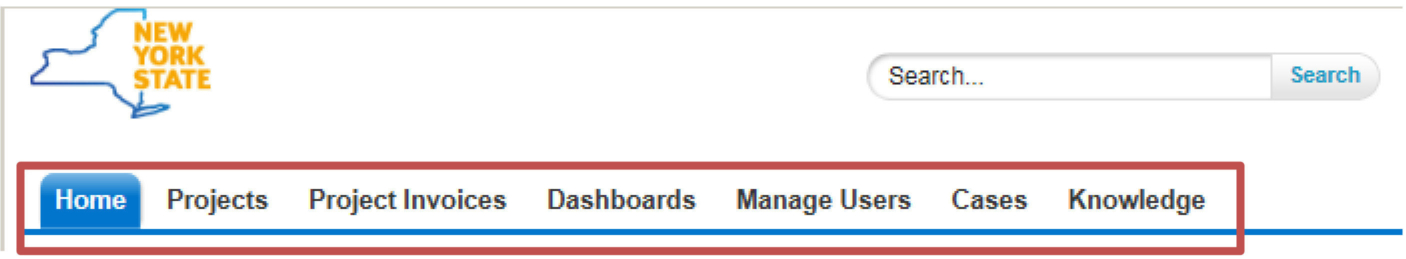
Section 5: System Navigation

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.

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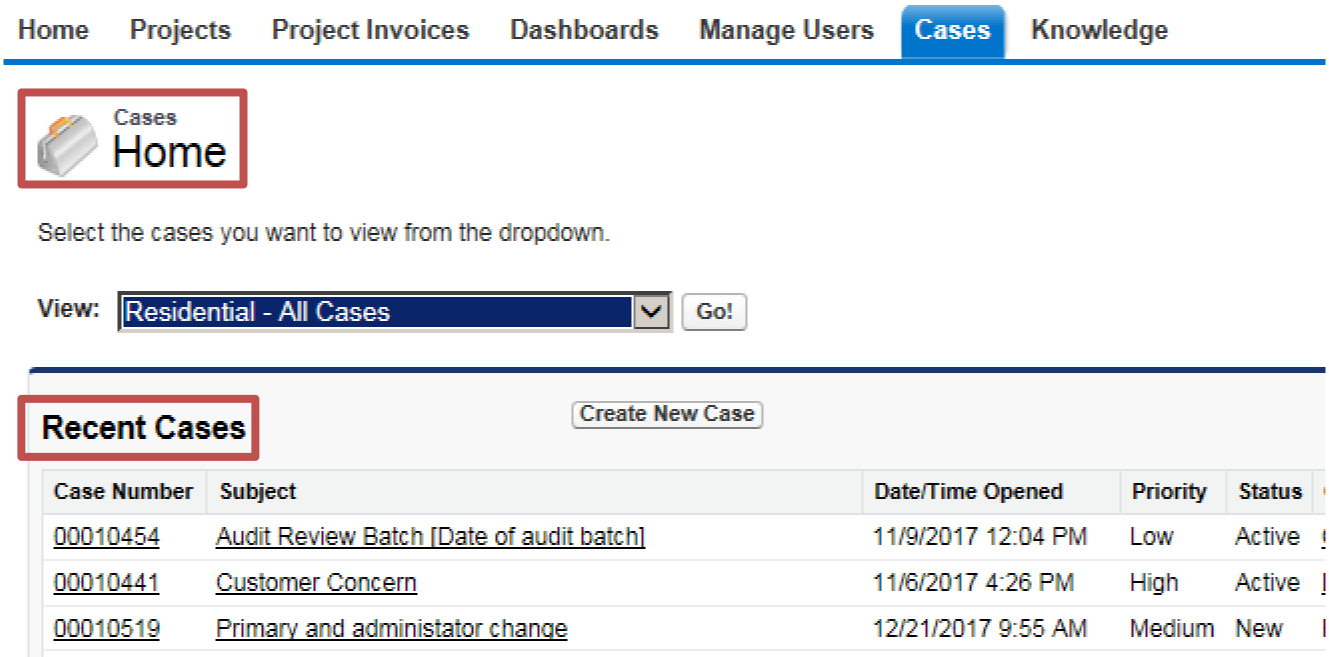
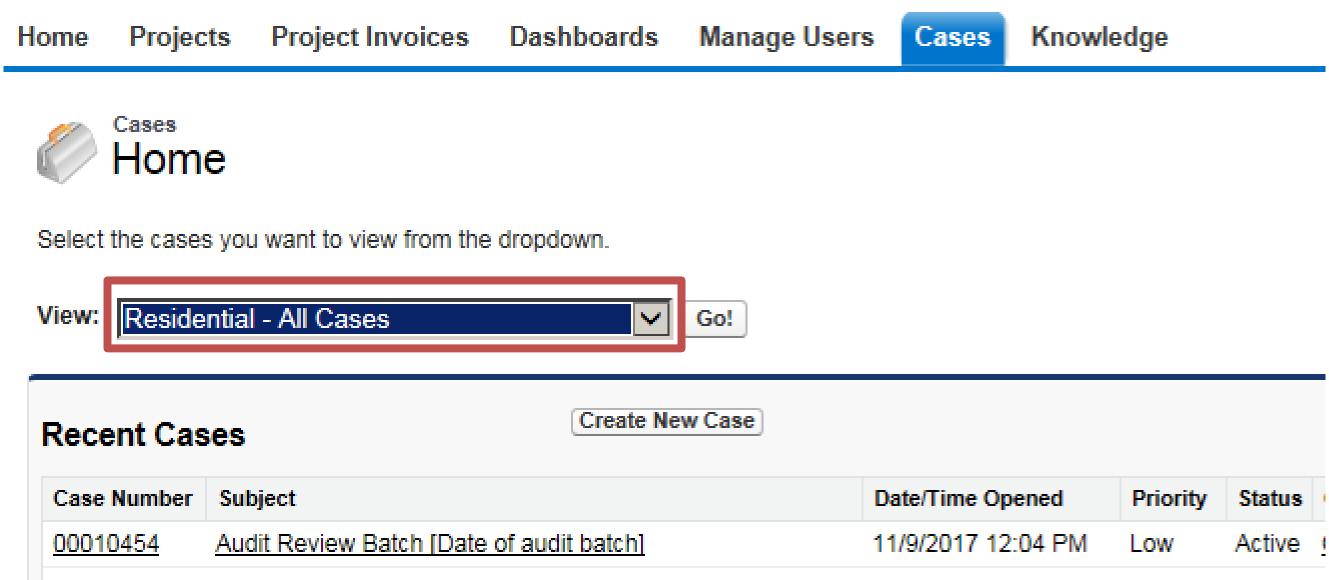
5.1 Viewing Cases with List Views

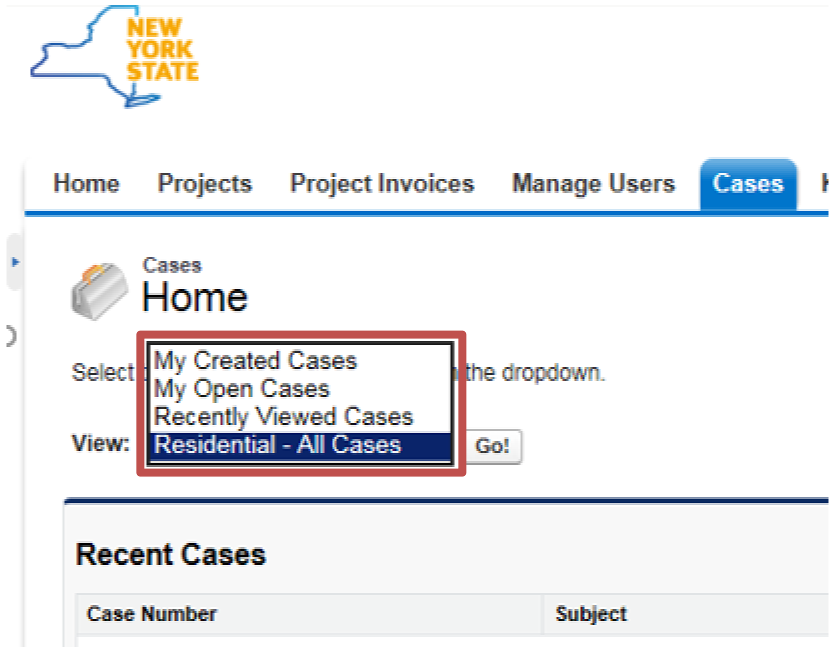
A list view is a customized list of records based on predefined criteria. Some list views have been developed for all users. The Cases Home page defaults to the Recent Cases list view. The Recent Cases list view shows a listing of cases recently viewed by the user for quick navigation to those cases.



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.

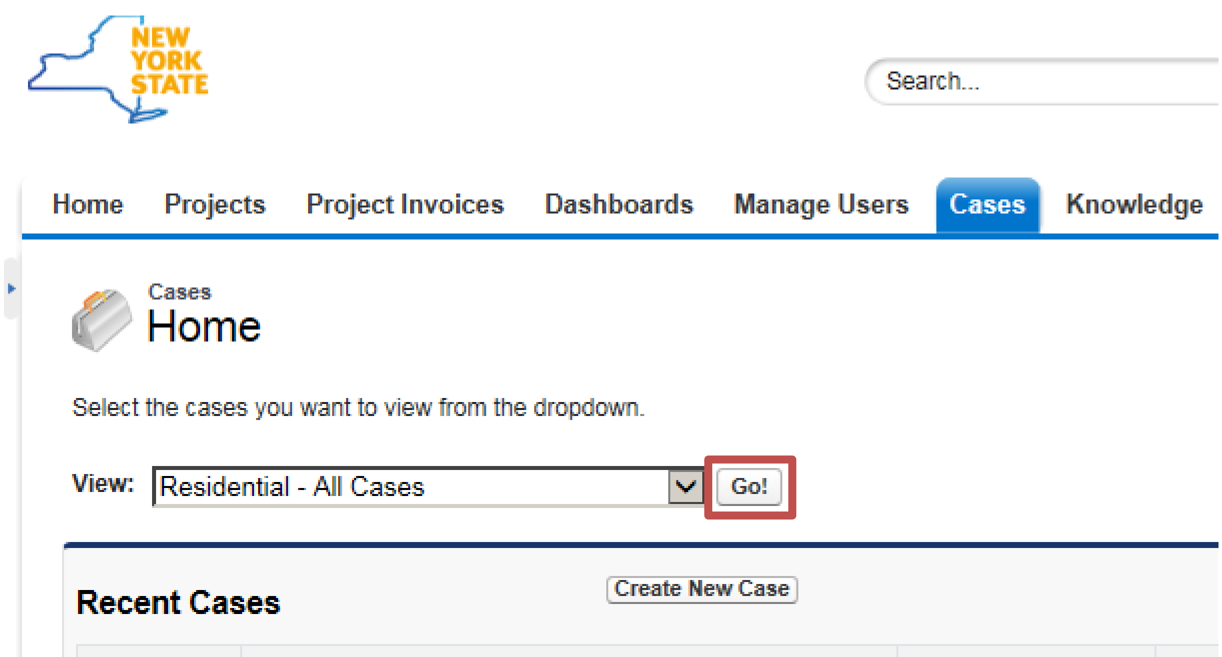




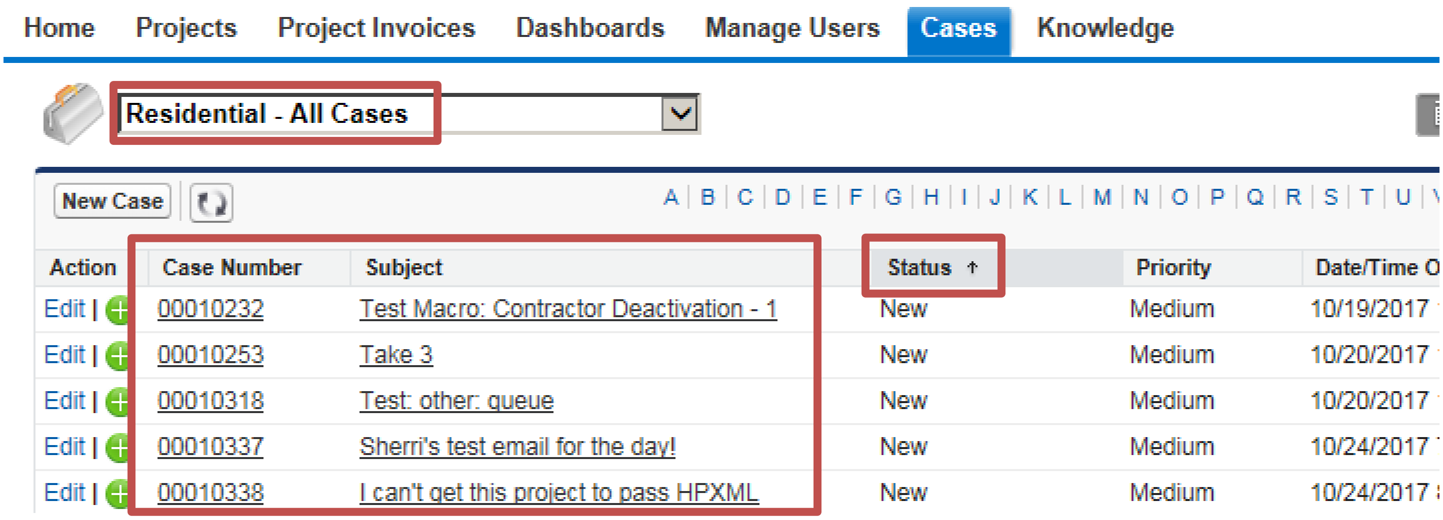
Key list views available include the following:

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.

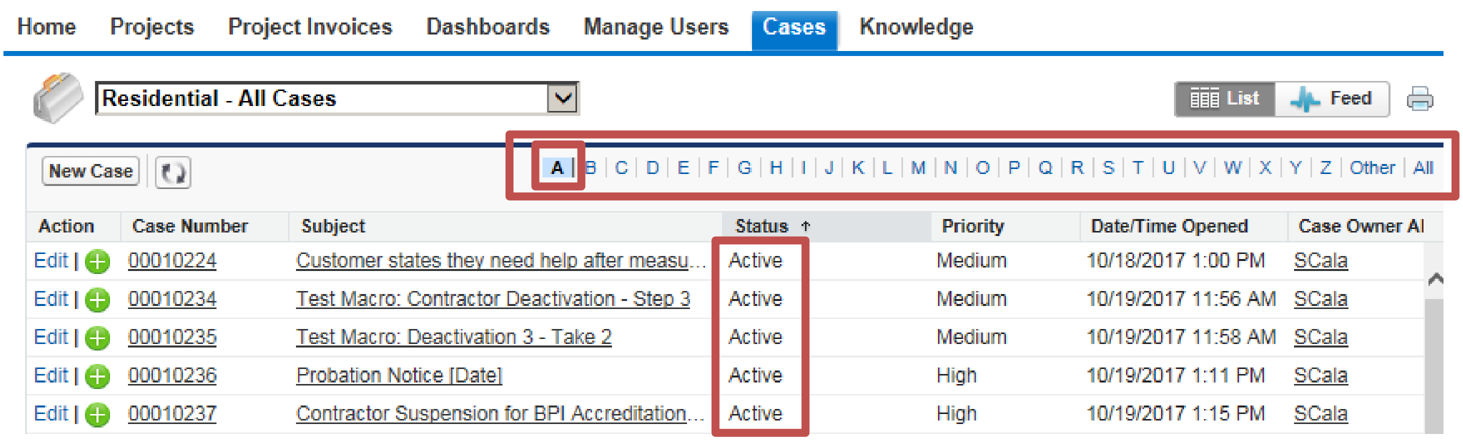
After selecting the List View, click the Go! button.



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.



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.



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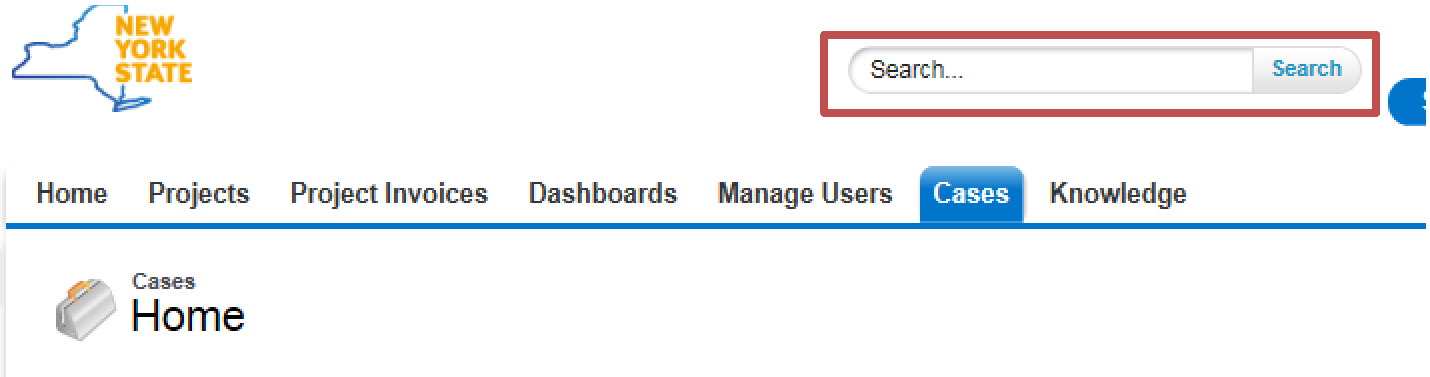
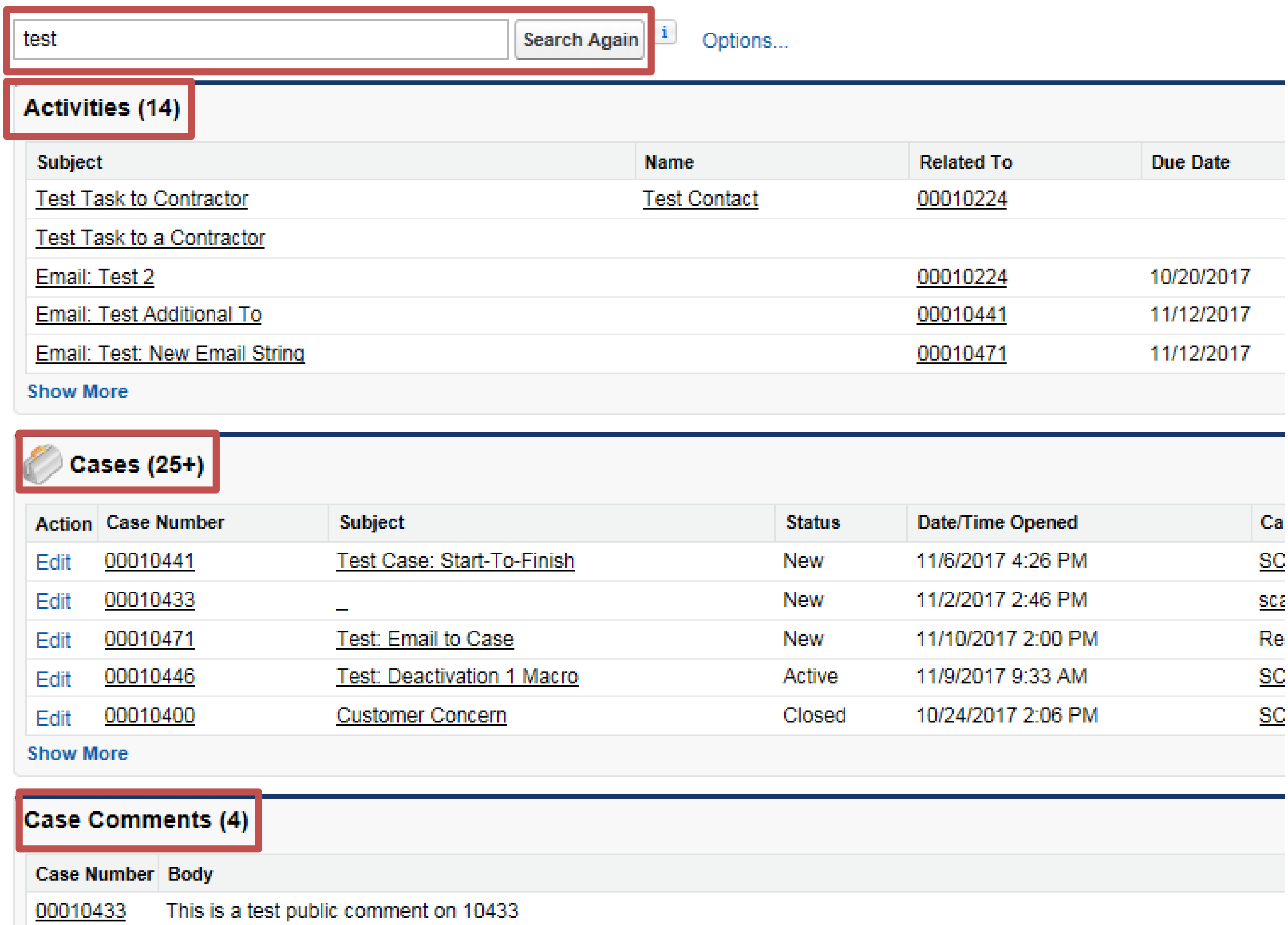
5.2 Using the Search Field

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.



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.



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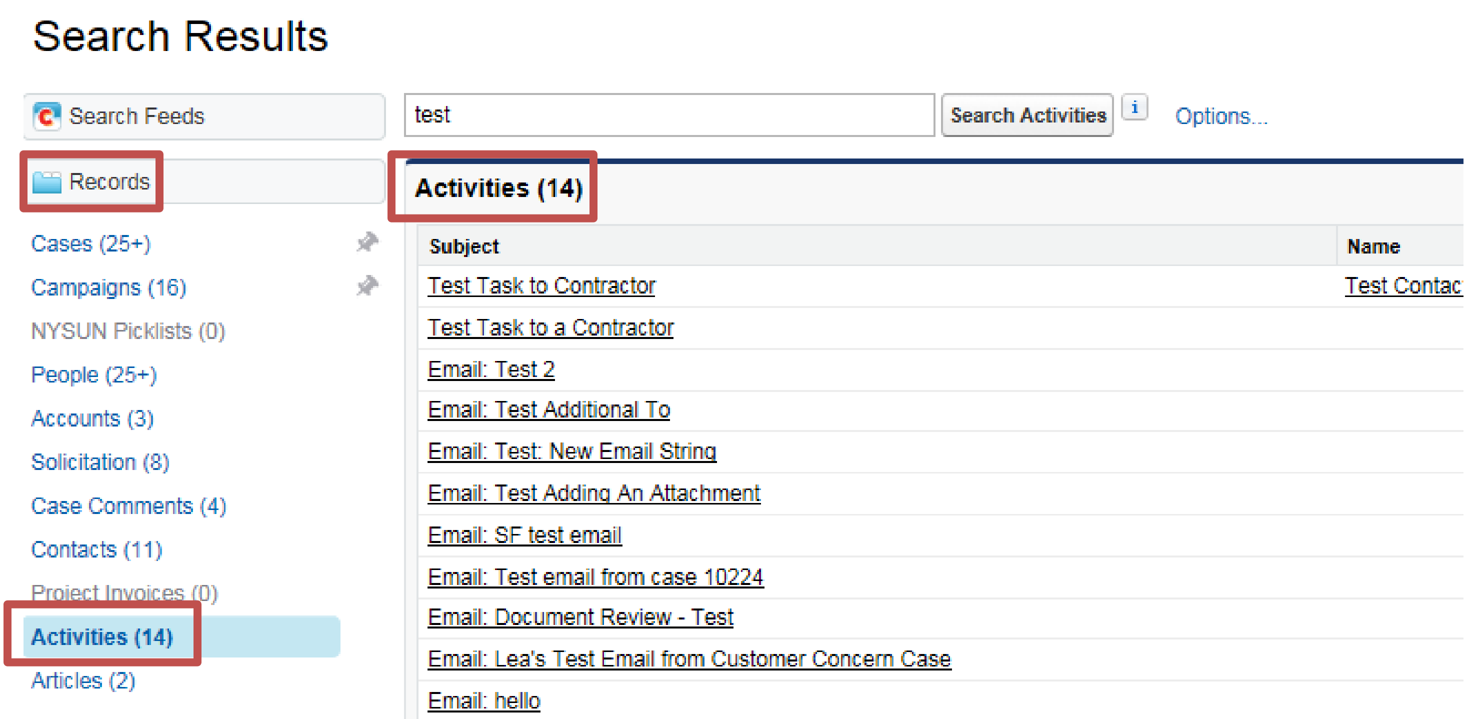
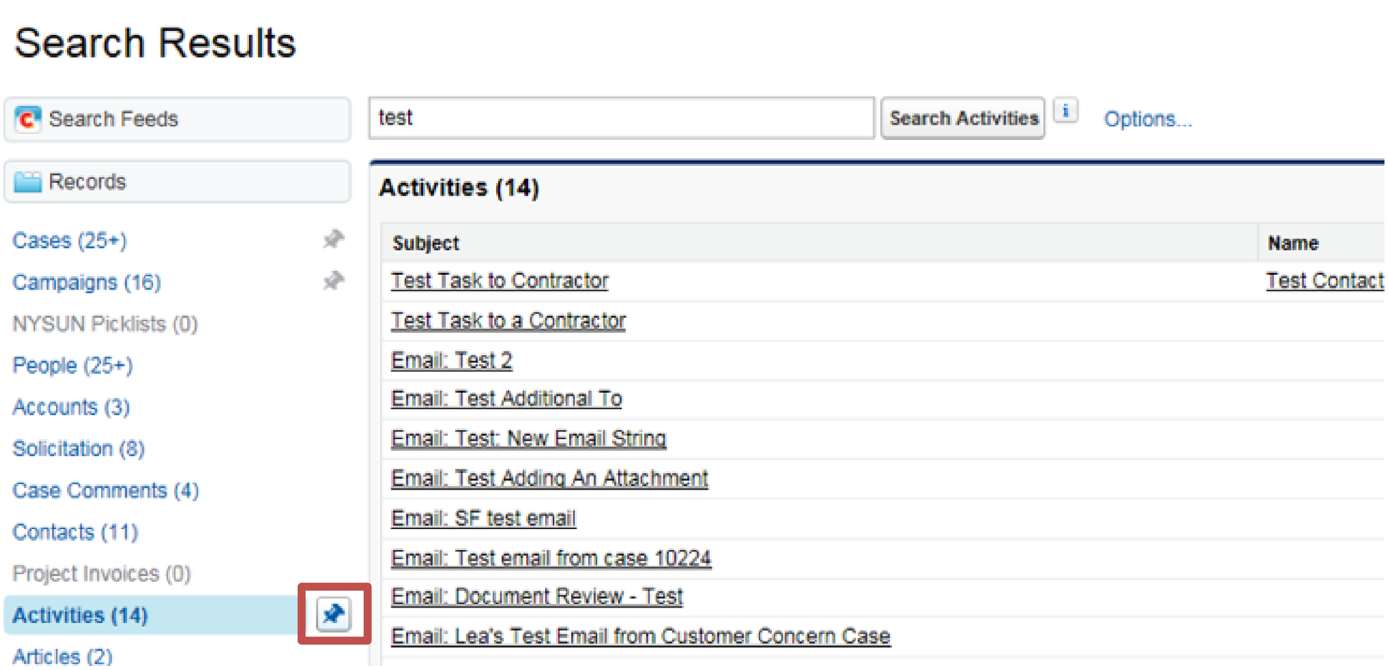
5.3 Organizing Search Results

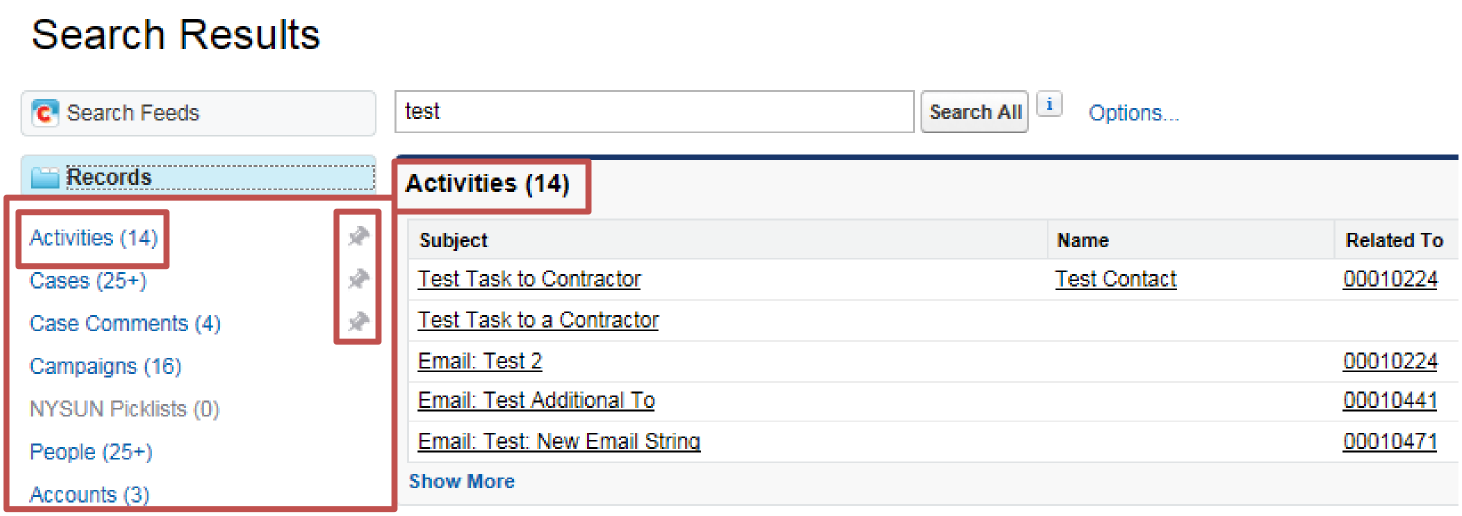
To the left of the search results is a menu of Records. Clicking one of the record types in the Records menu directs the user to the section with the results for that record type. In this example, clicking the Activities (14) record type navigates the user to the Activities results.



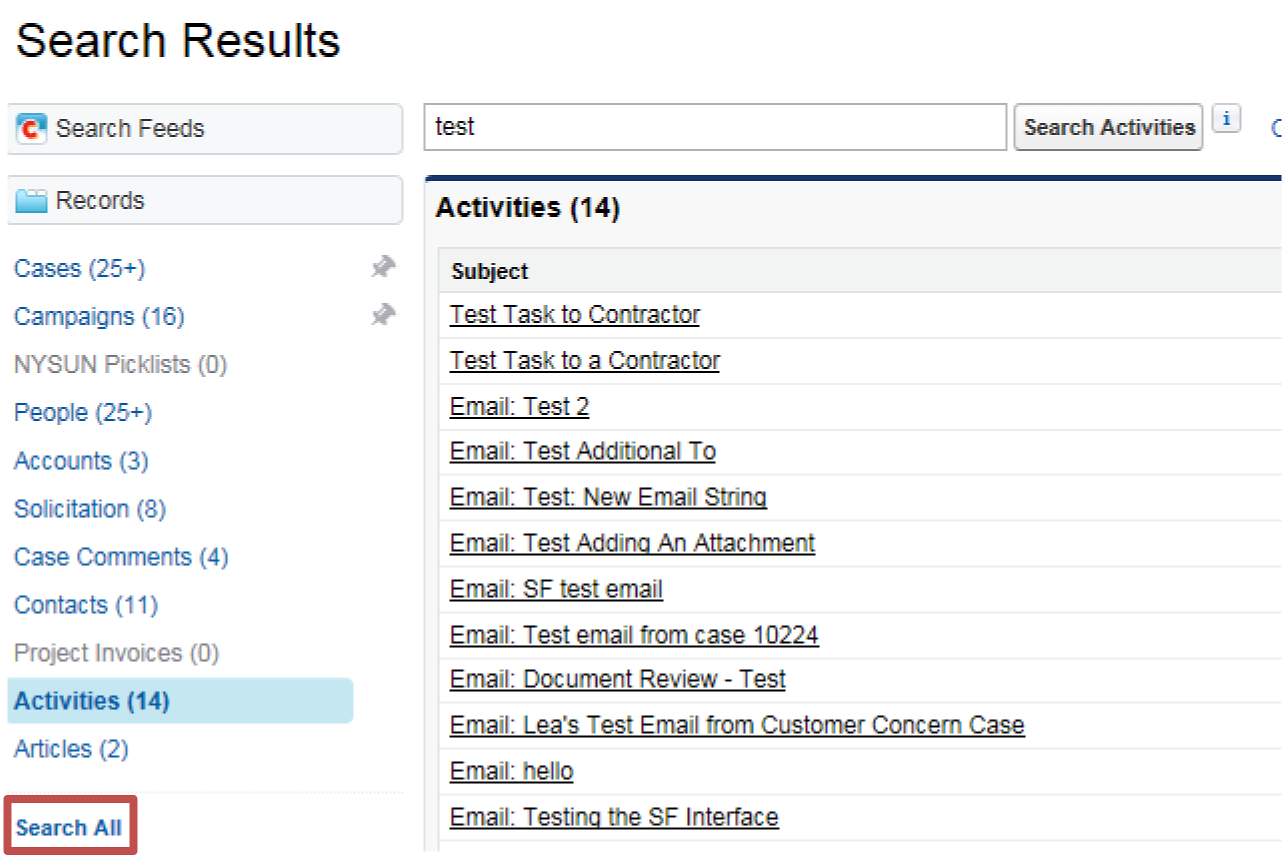
To pin the most commonly used record types to the top of the side menu for easier navigation, hover over one of the options in this menu to display a pushpin symbol, and then click the pushpin to pin the record type to the top.



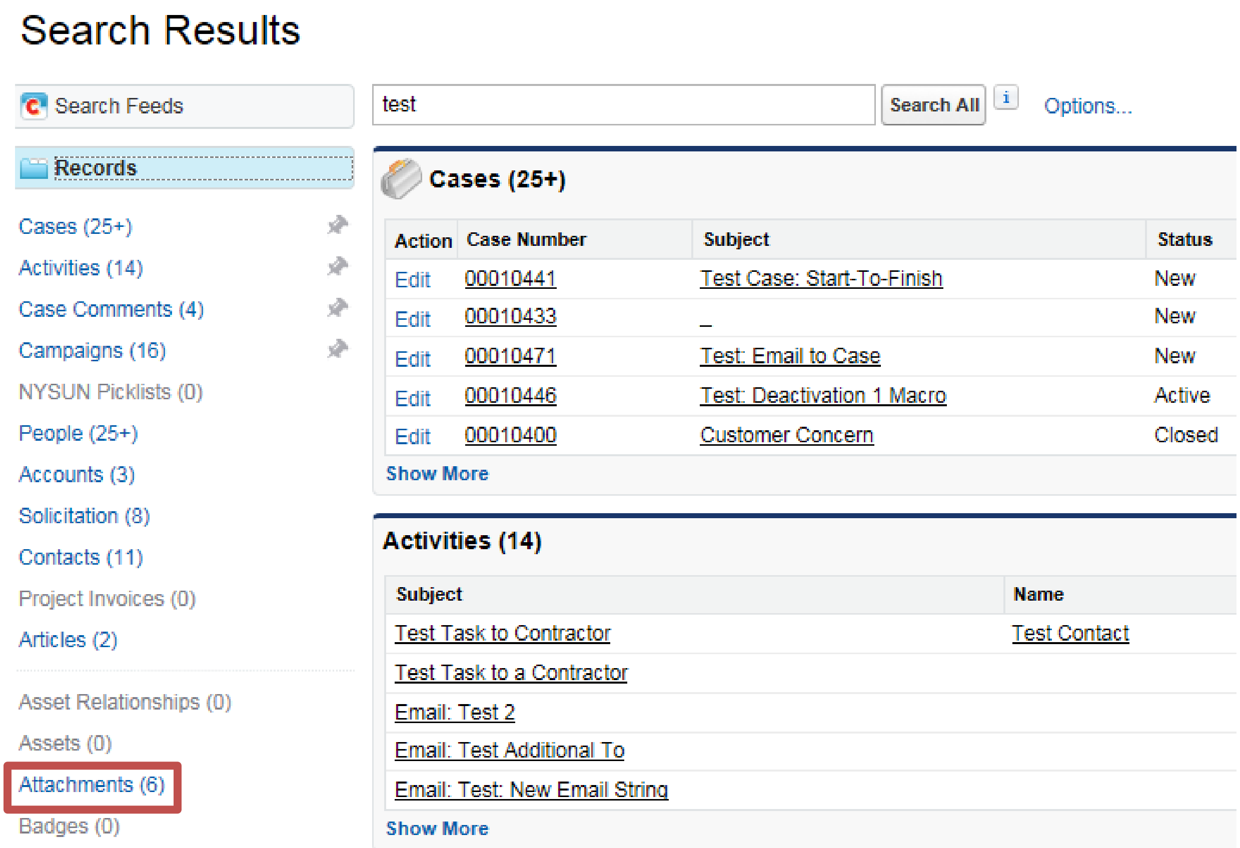
When a search is conducted, the results are displayed in the order of record type as presented in the side menu. In this example, Activities, Cases, and Case Comments were pinned to the top.



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.”



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.



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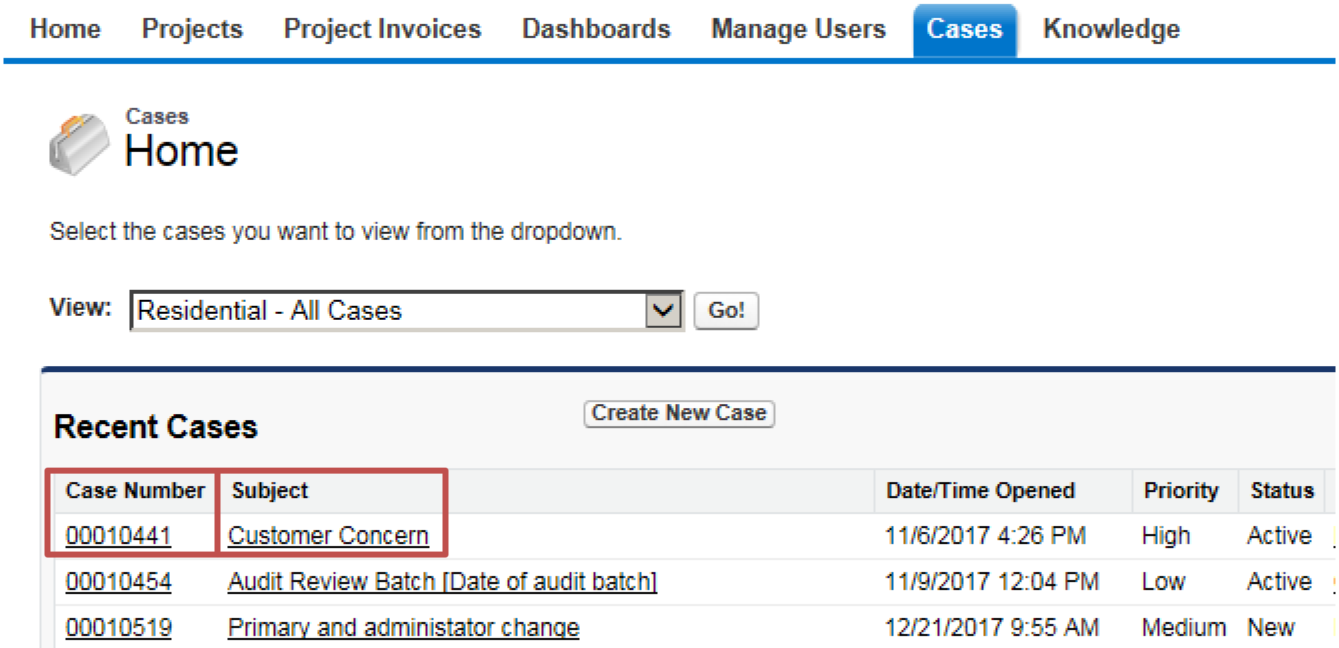
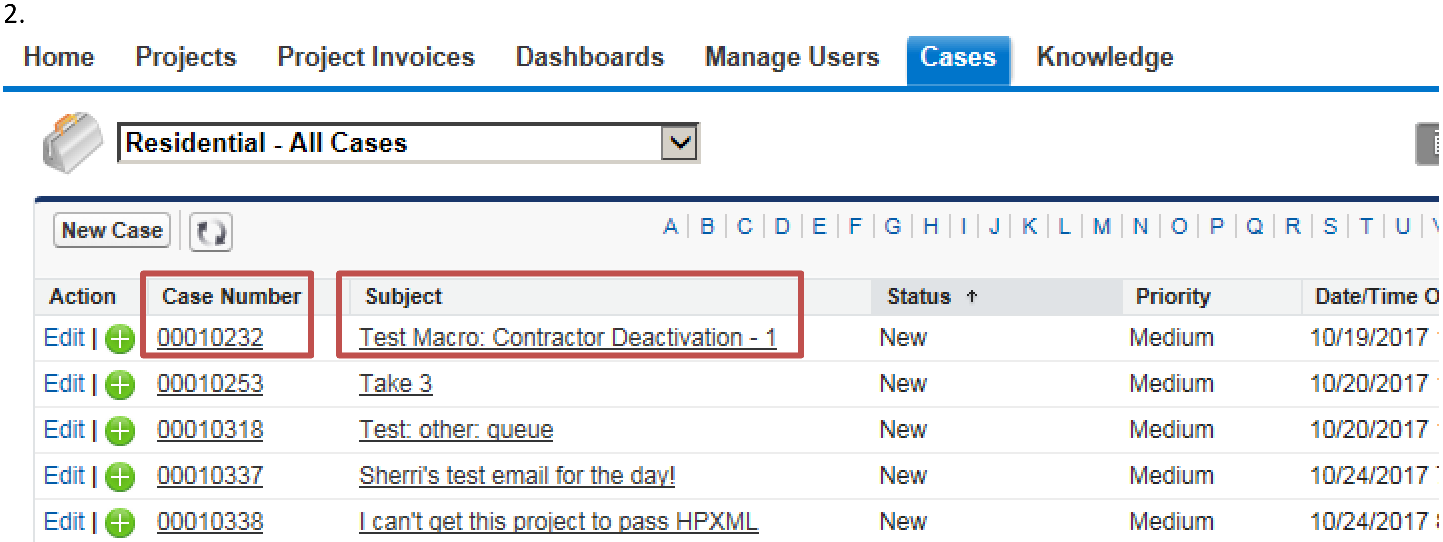
5.4 Viewing a Case

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:

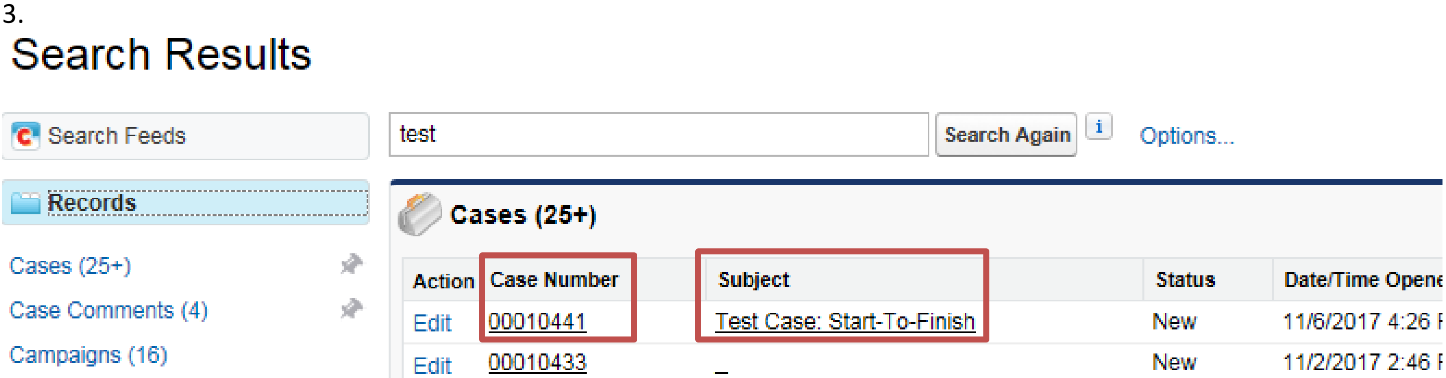
1.


Home
Projects
Project Invoices
Dashboards
Manage Users
Cases
Knowledge
Cases
Home
Select the cases you want to view from the dropdown.
View:
Residential - All Cases
Go!
Recent Cases
Create New Case
Case Number
Subject
Date/Time Opened
Priority
Status
00010441
Customer Concern
11/6/2017 4:26 PM
High
Active
00010454
Audit Review Batch [Date of audit batch]
11/9/2017 12:04 PM
Low
Active
00010519
Primary and administator change
12/21/2017 9:55 AM
Medium
New

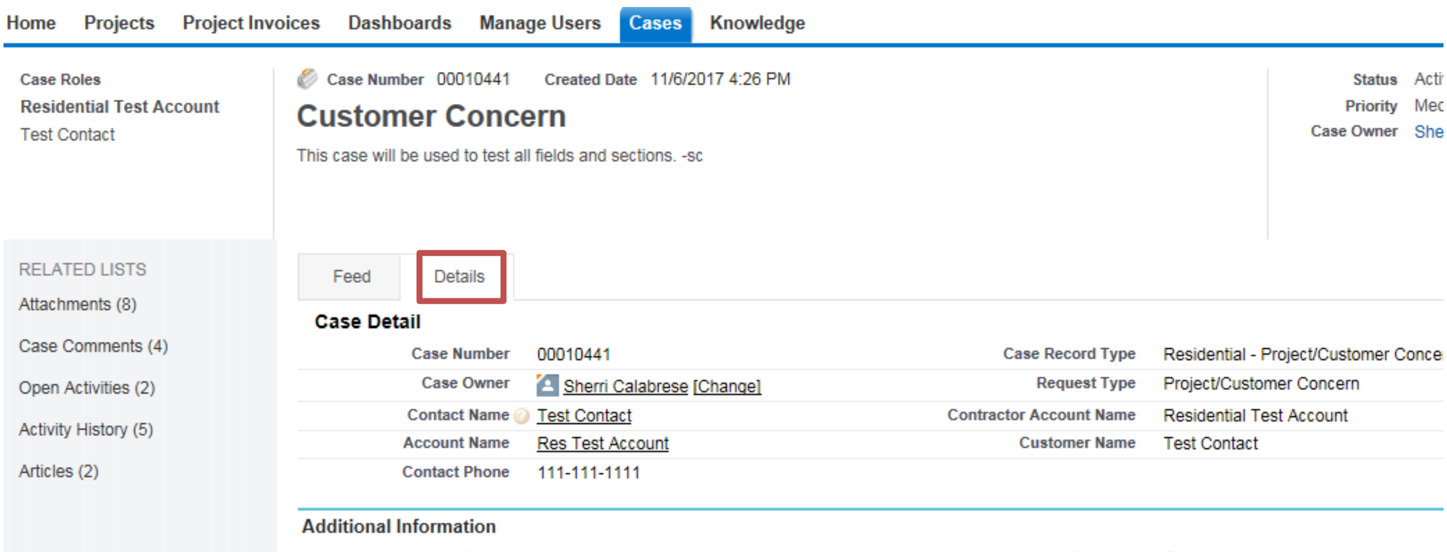
2.


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
Action
Case Number
Subject
Status
Priority
Edit | 00010232 Test Macro: Contractor Deactivation - 1 New Medium 10/19/2017
Edit | 00010253 Take 3 New Medium 10/20/2017
Edit | 00010318 Test: other: queue New Medium 10/20/2017
Edit | 00010337 Sherri's test email for the day! New Medium 10/24/2017
Edit | 00010338 I can't get this project to pass HPXML New Medium 10/24/2017

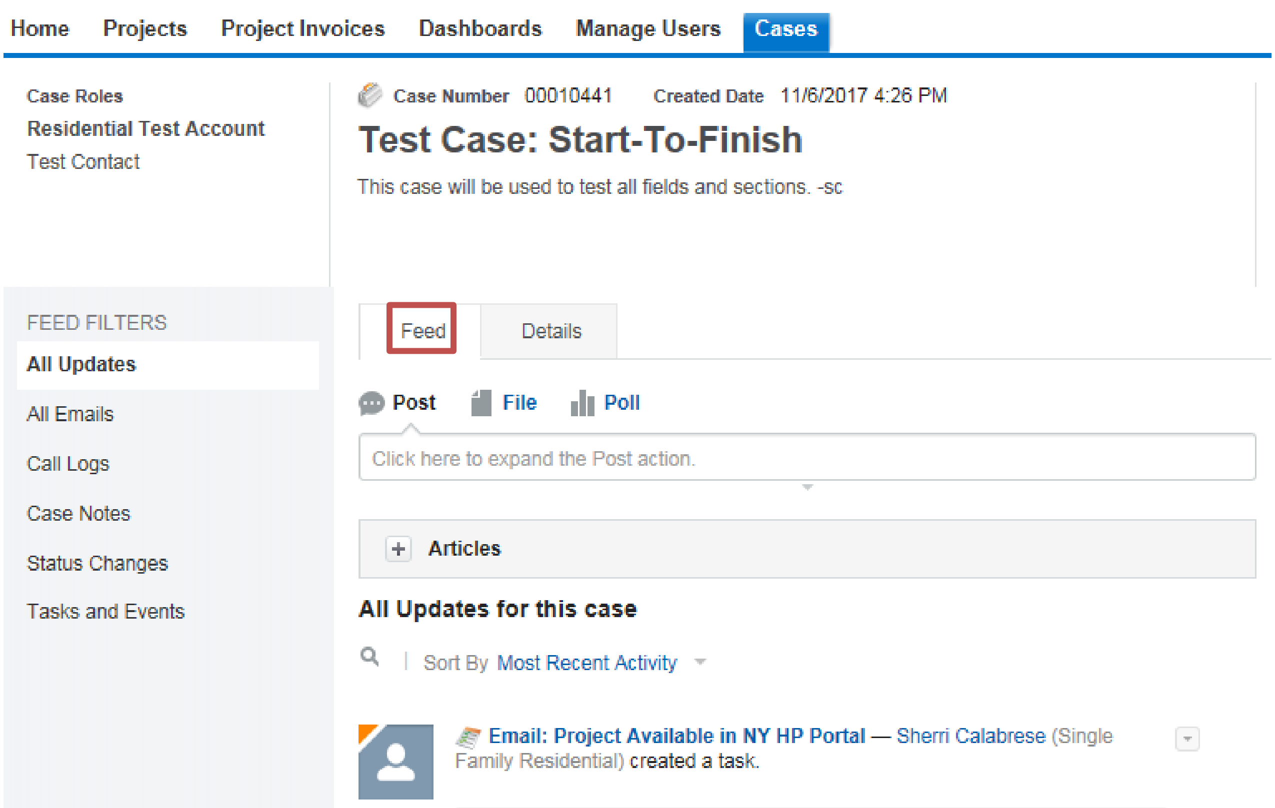
3.


Search Results
Search Feeds
test
Search Again
Options...
Records
Cases (25+)
Case Comments (4)
Campaigns (16)
Cases (25+)
Action
Case Number
Subject
Status
Edit 00010441 Test Case: Start-To-Finish New 11/6/2017 4:26
Edit 00010433 New 11/2/2017 2:46

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).



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



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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 to contact the contractor support team.
3. Call the contractor support line at 1-800-284-9069.

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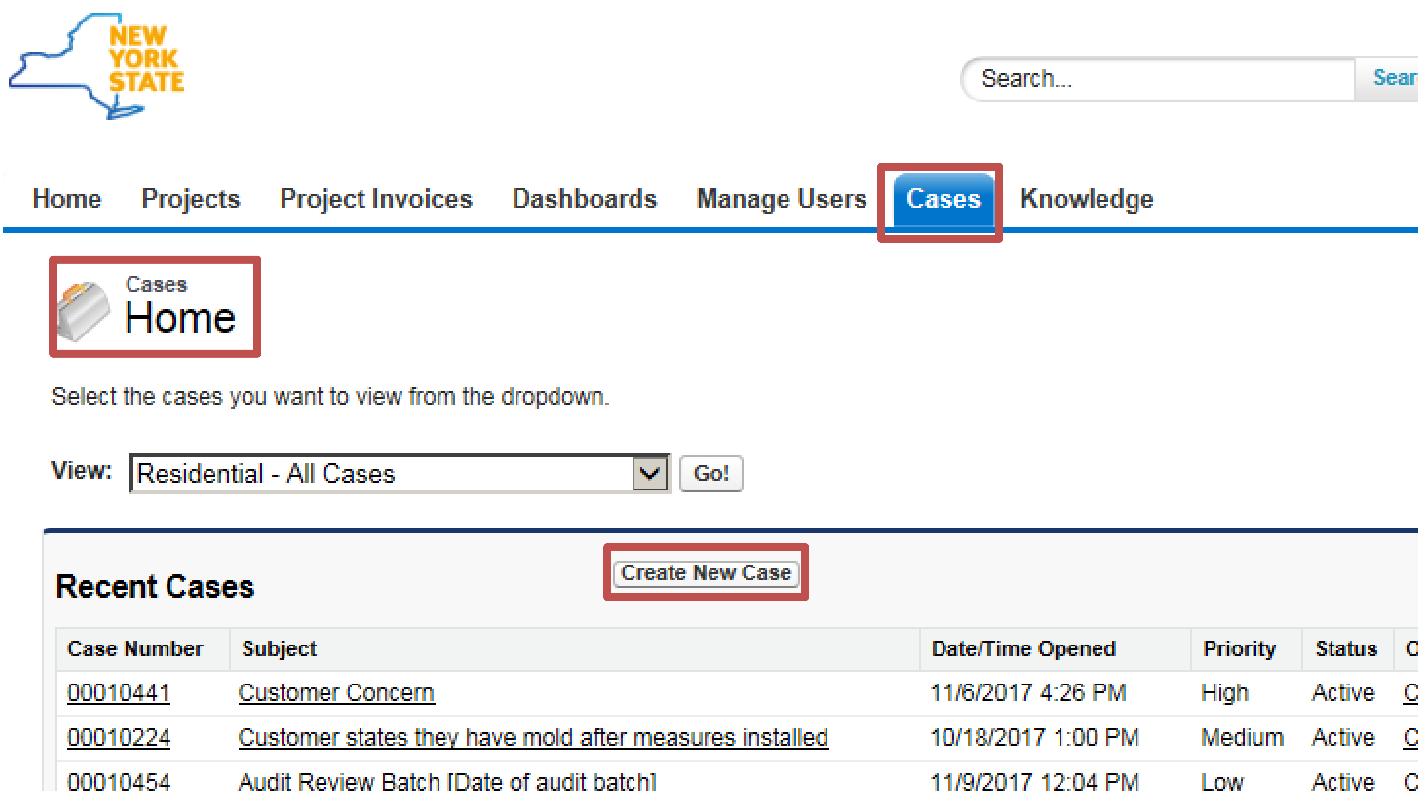
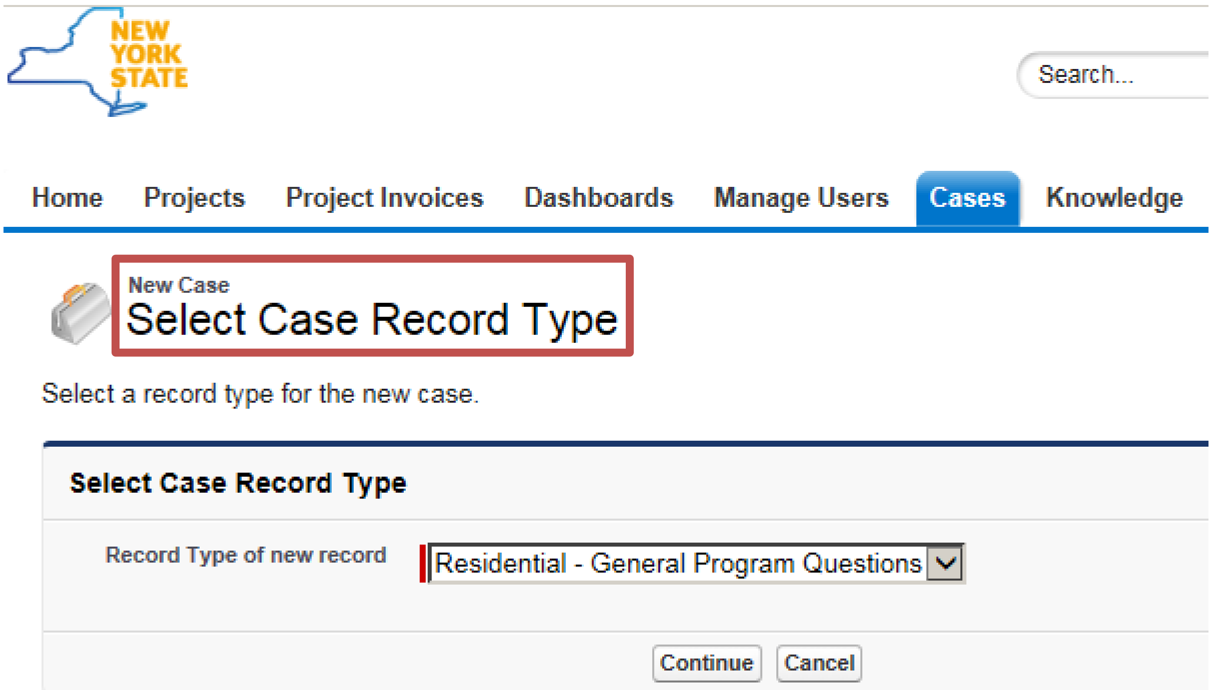
6.1 Create a Case via Logging In

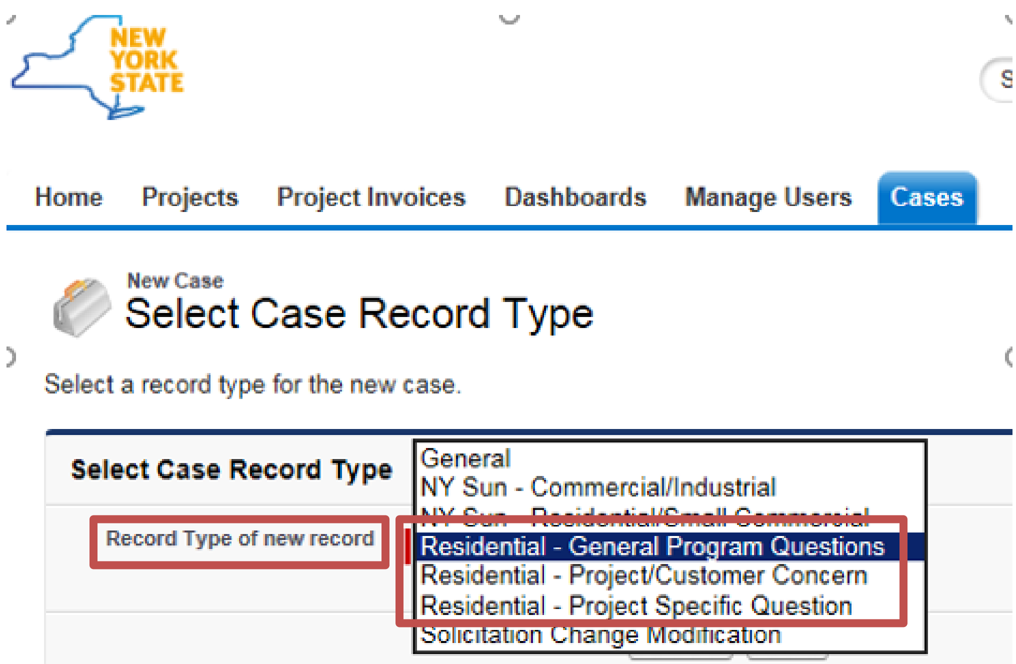
To create a new case from the Cases Home page, click the Create New Case button in the Recent Cases section.



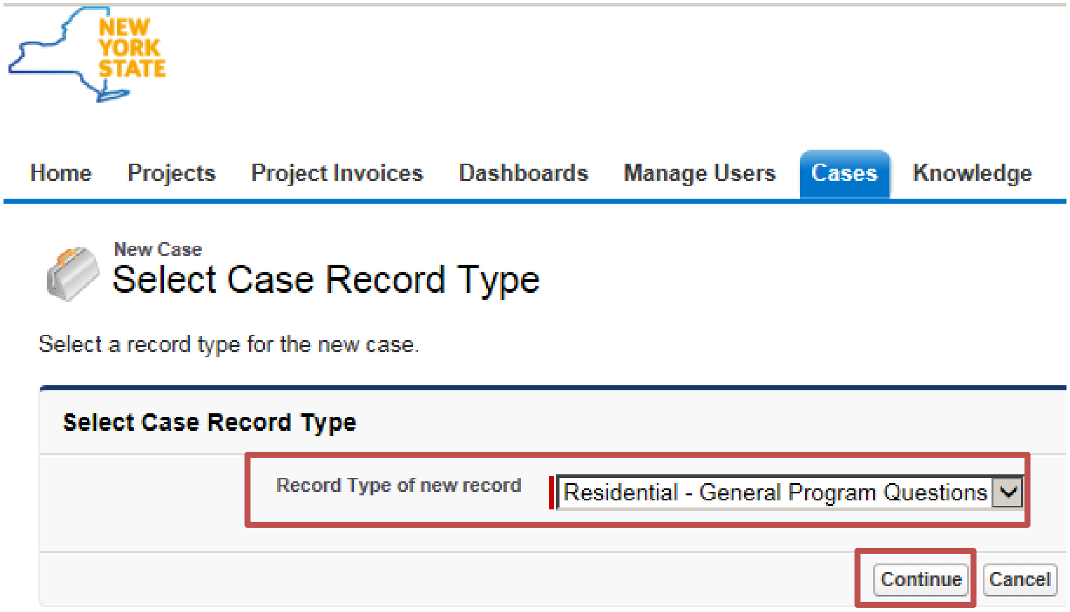
Clicking the Create New Case button from the Cases Home page opens the New Case/Select Case Record Type page.



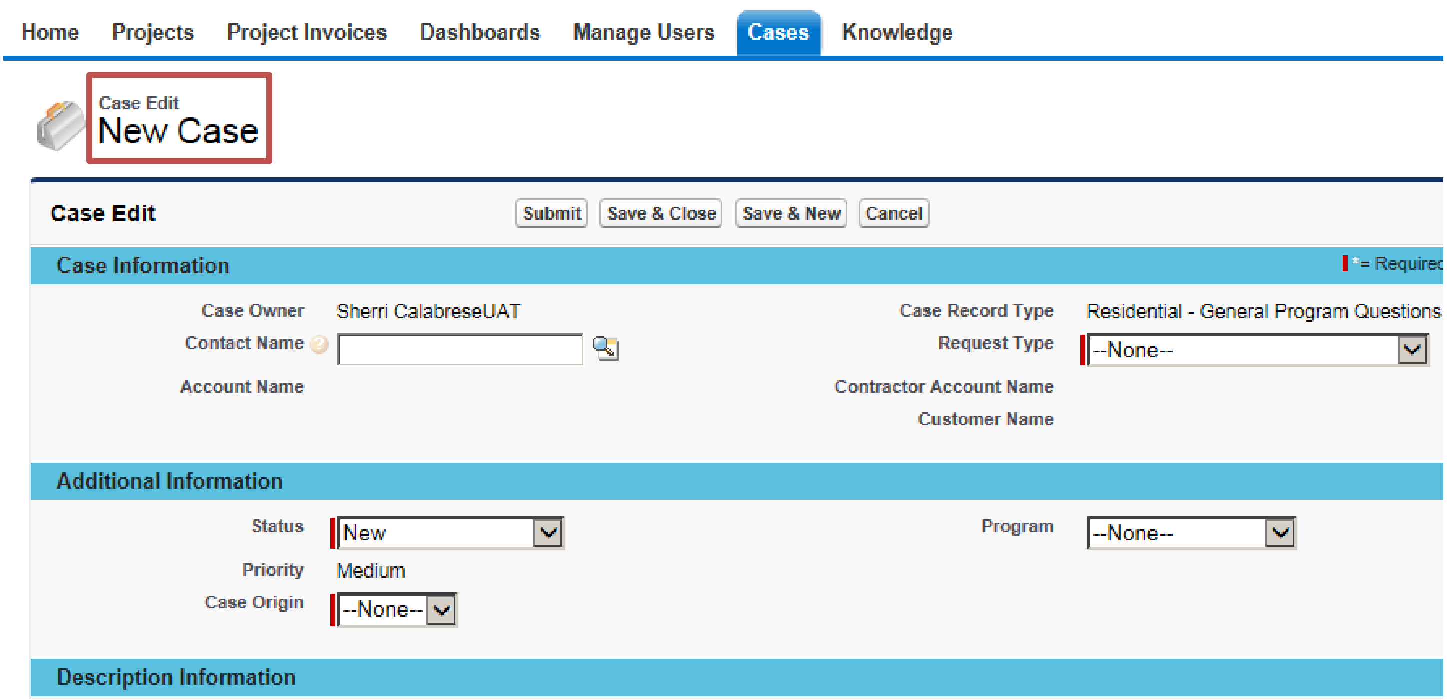
Click the Record Type in the new record dropdown box and select the appropriate Case Record Type (see Section 8: Case Classification for information regarding Case Record Types and their use).



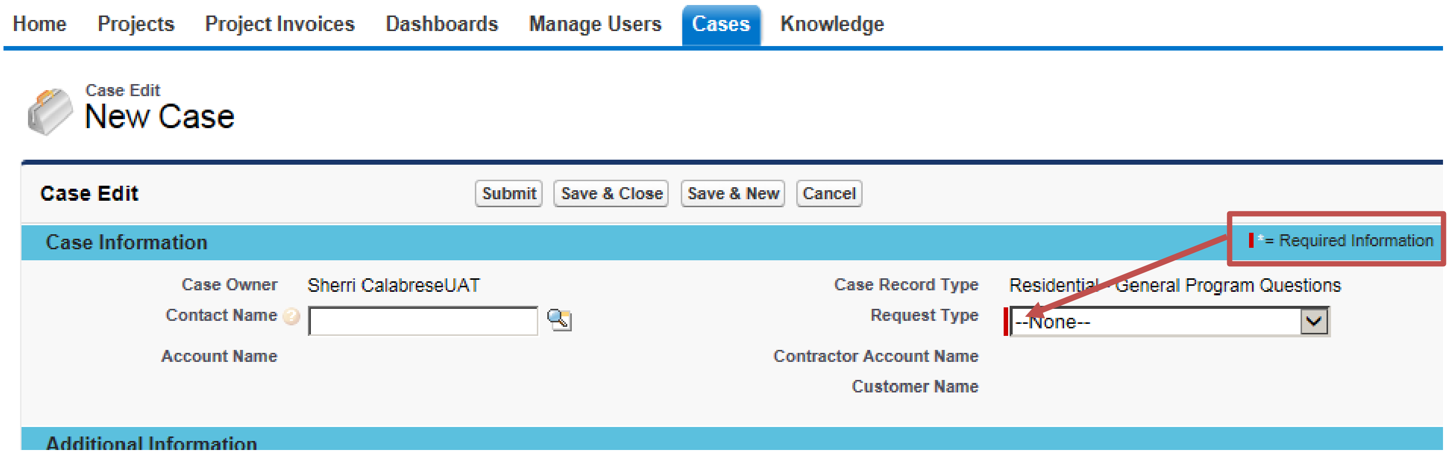
When the appropriate Case Record Type is populated in the dropdown box, click on the Continue button.



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



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



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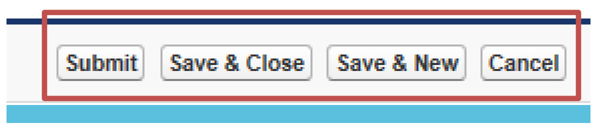
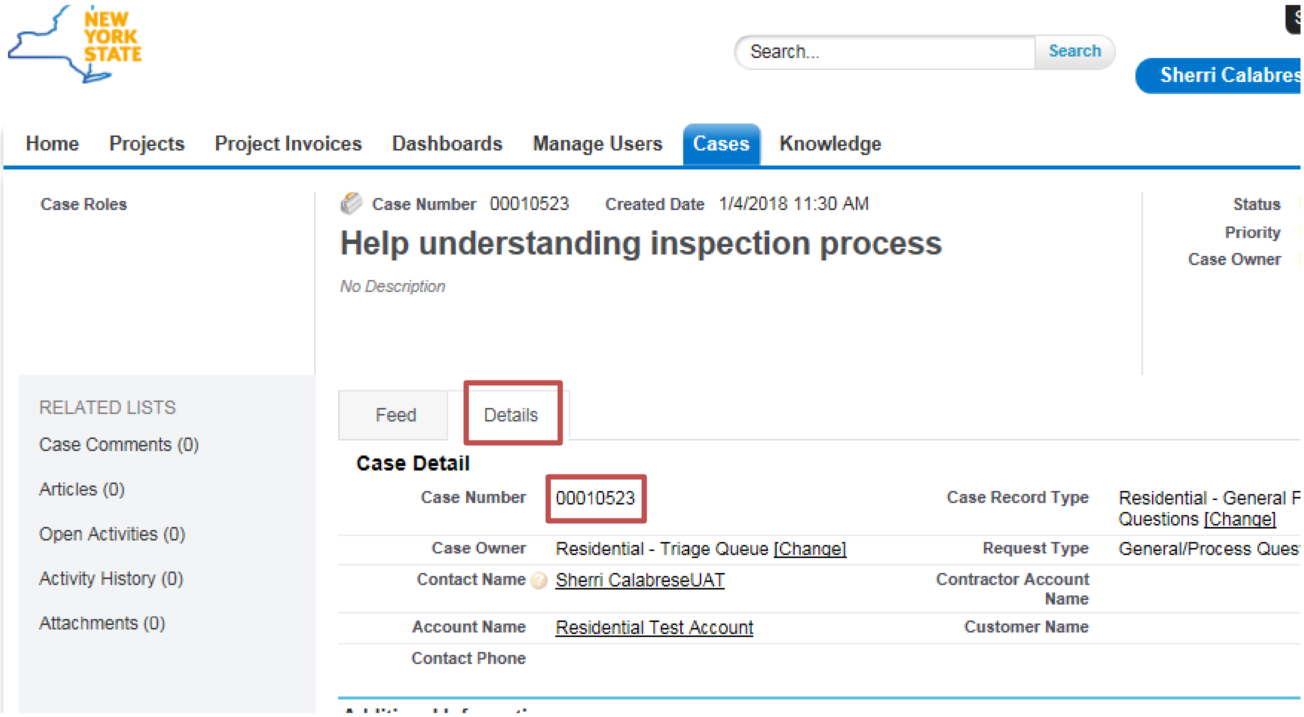
6.1.1 Save Options

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.



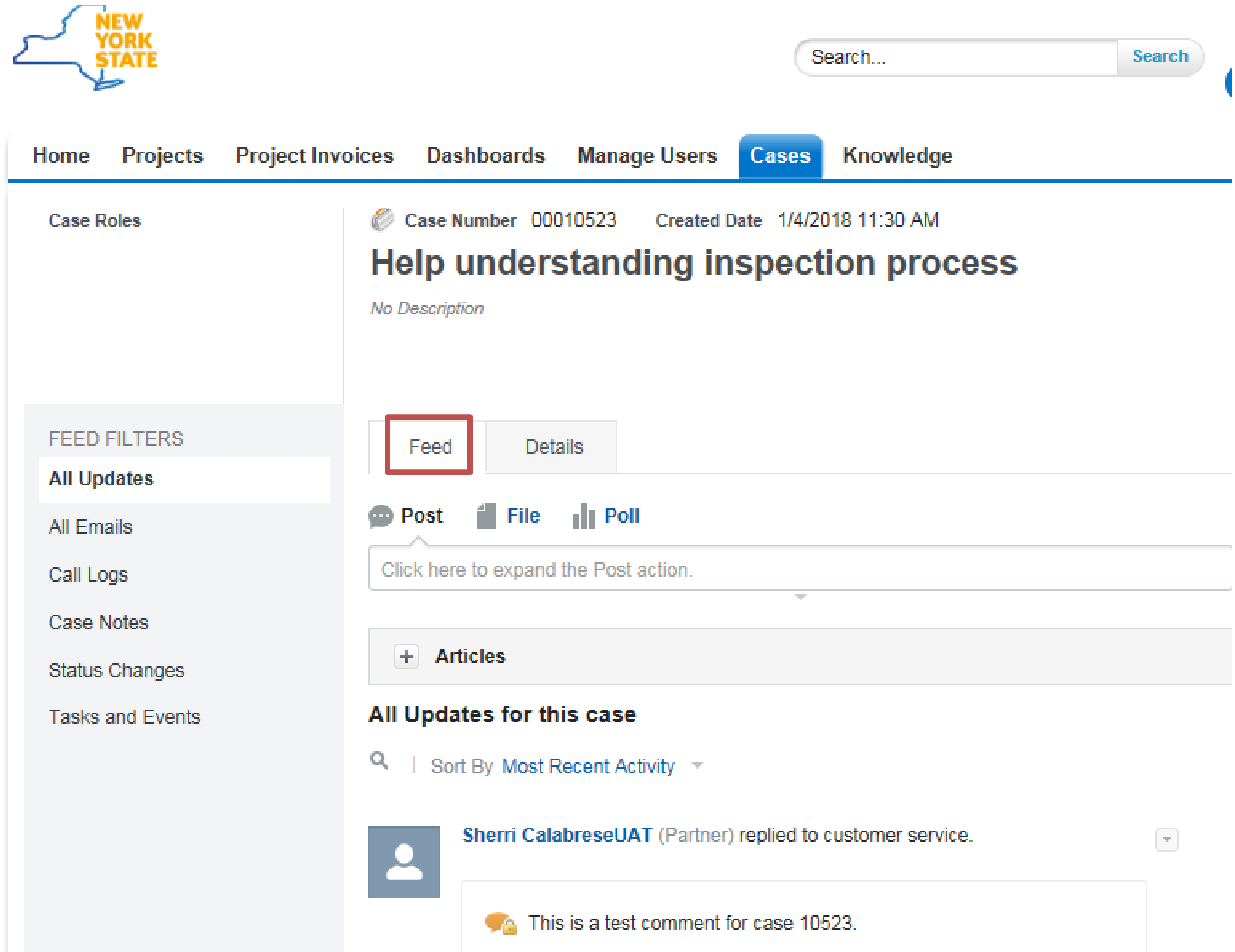
Save options:

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.



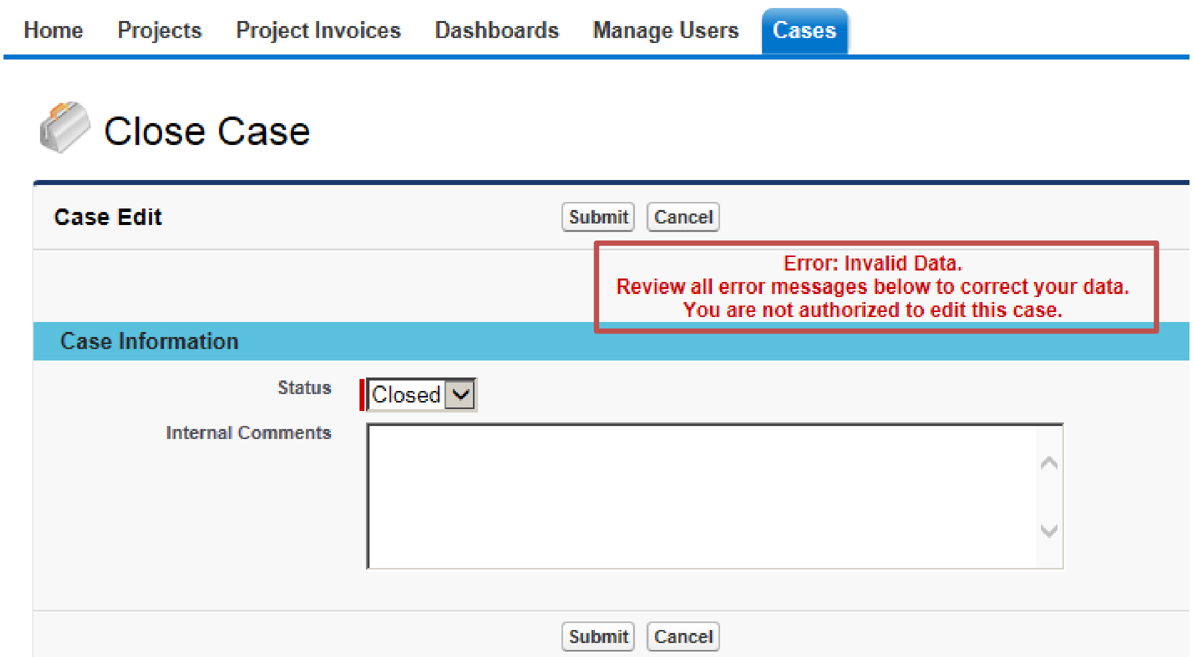
The Details tab of a case, displays all associated fields and sections for the case (See Sections 9-16).

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.



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.

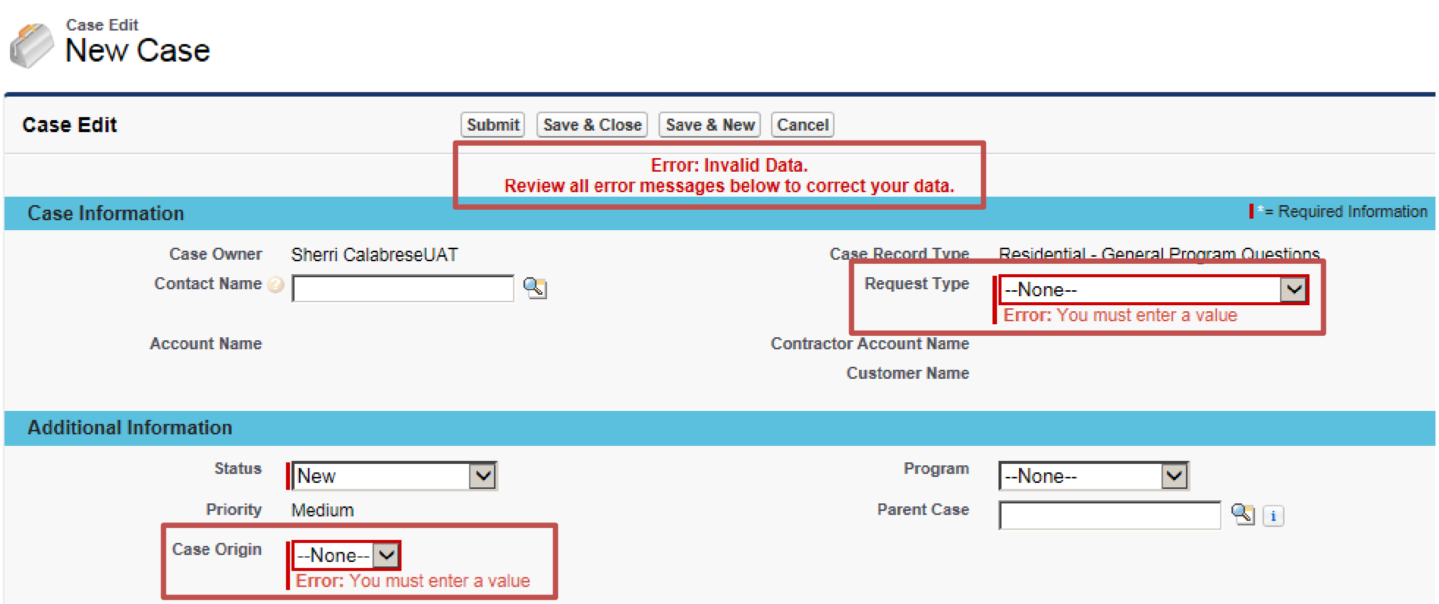
   Note: Participating contractors do not have permission to close cases. If a participating contractor clicks the Submit button from the Close Case page, an error message appears. Selecting the cancel button returns the user to the saved case.



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):



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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, 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.

> Thu 11/2/2017 4:02 PM
>
> noreply@salesforce.com on behalf of Residential Services <no-reply@nyserda.ny.gov>
>
> **Sandbox: Residential Support Case #00010436**
>
> To Calabrese, Sherri A (NYSERDA)
>
> 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.

E

Thu 1/4/2018 4:30 PM

noreply@salesforce.com on behalf of Residential Services <no-reply@nyserda.ny.gov>

Sandbox: Residential Support Case #00010525

'o Calabrese, Sherri A (NYSERDA)

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 automatically creates a new case in the NYSERDA Portal.

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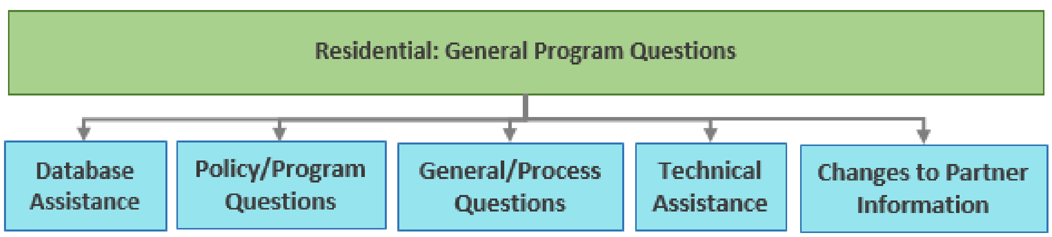
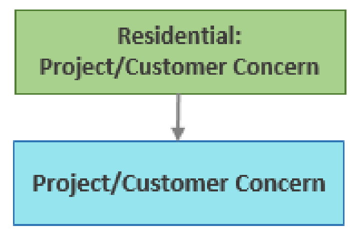
Section 8: Case Classification

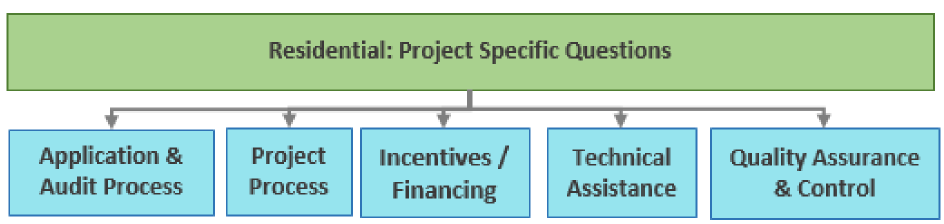
There are two primary ways in which a case is classified: Case Record Type and Request Type. Classifying a case appropriately quickly communicates the nature of the case to program teams, helps during triage to ensure the case is routed to the correct team, and assists in reporting. Classification starts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

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







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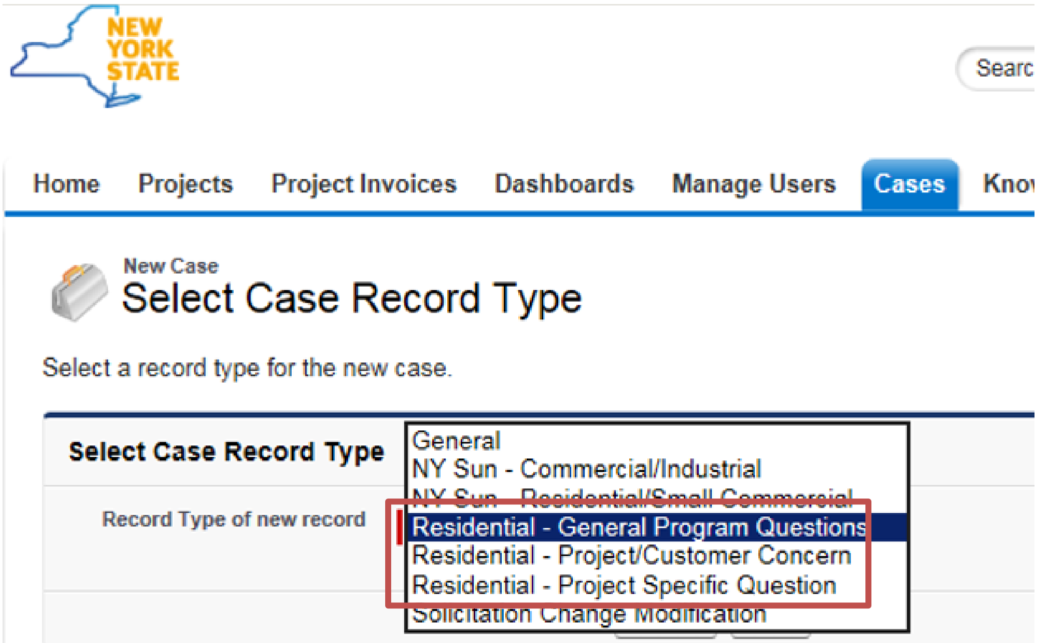
8.1 Case Record Types

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.



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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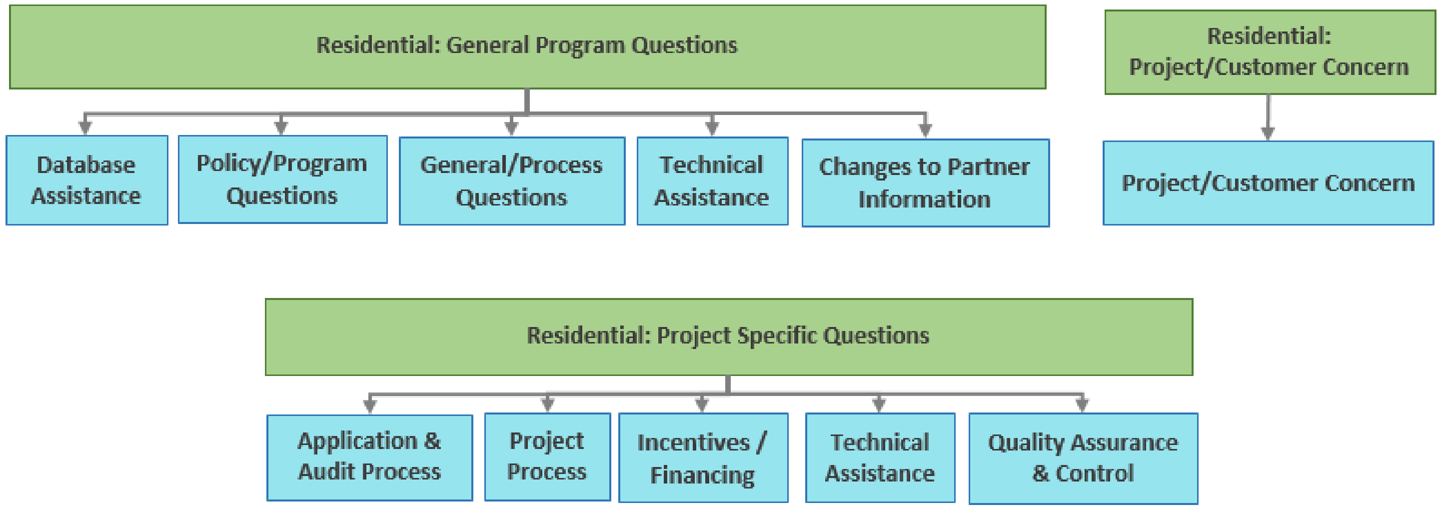
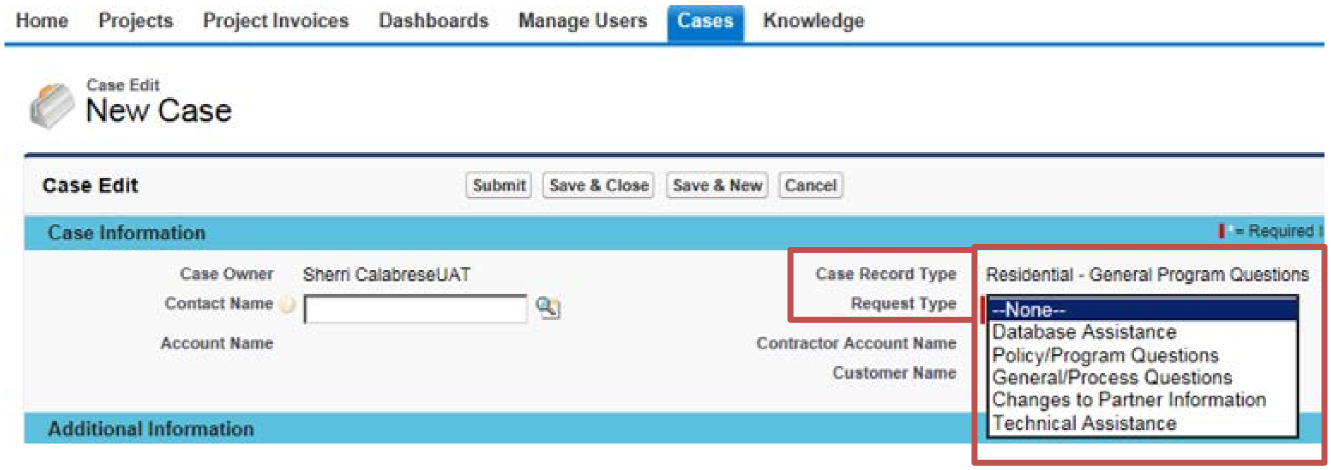
8.2 Request Types

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.

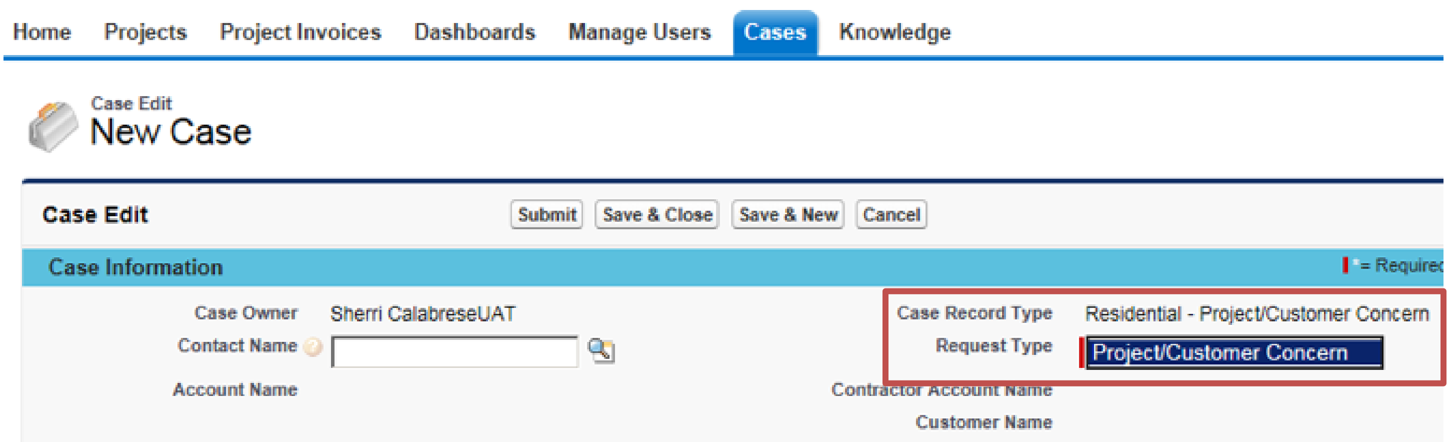
The Project/Customer Concern Case Record Type has only one Request Type whereas the other Case Record Types have several. Where there is only one Request Type, the field defaults to the available Request Type. Instances in which there are multiple Request Types, the Request Type requires manual selection.



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.)



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



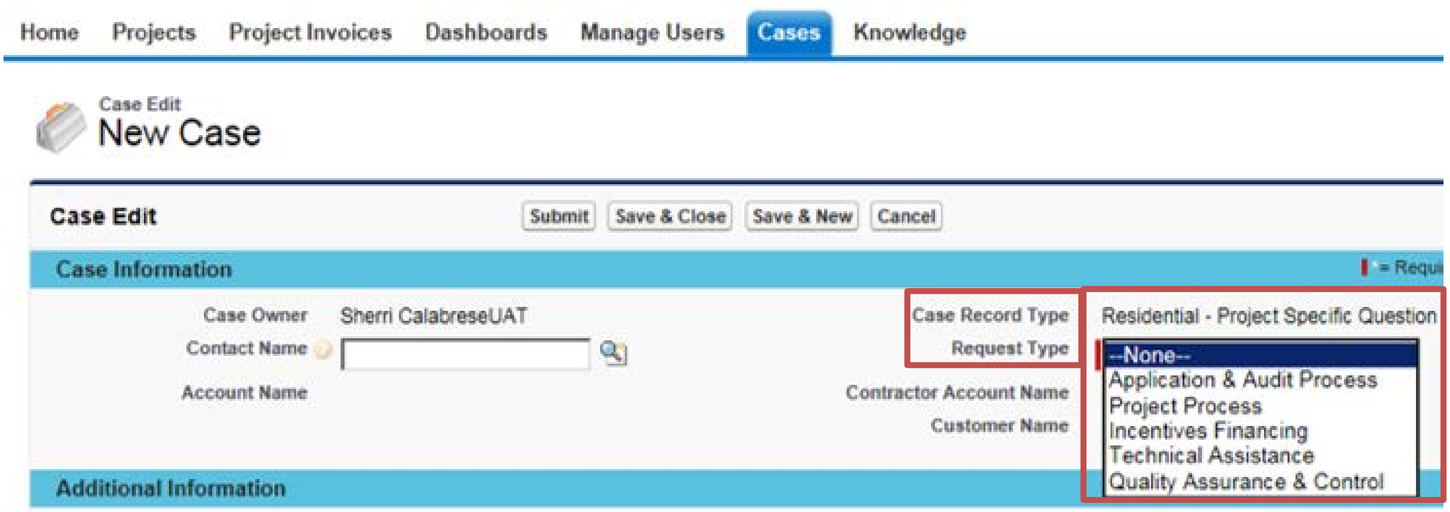
3. When the Case Record Type is **Residential – Project Specific Question**, Request Type includes:
   a. **Application & Audit Process:** Application and audit related questions associated with a specific project. Some examples may include the following:
      1. Questions regarding an audit approval 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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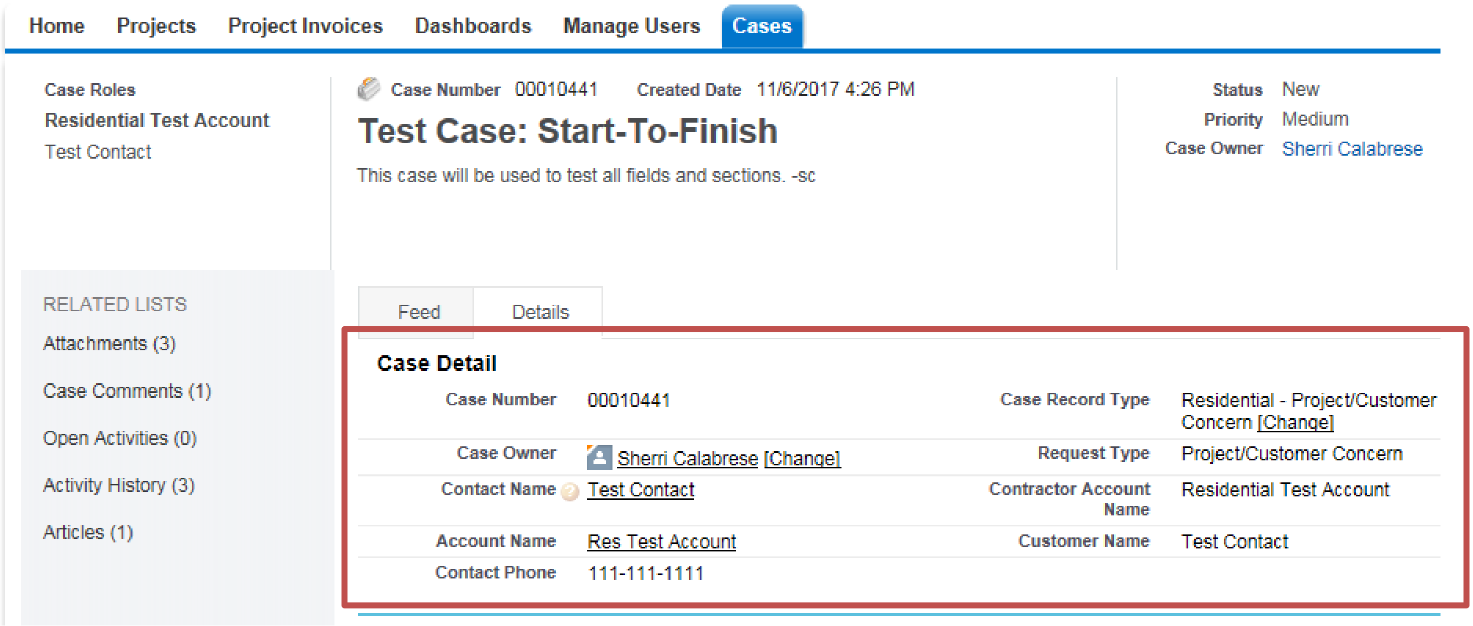
Section 9: Case Information Fields

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.



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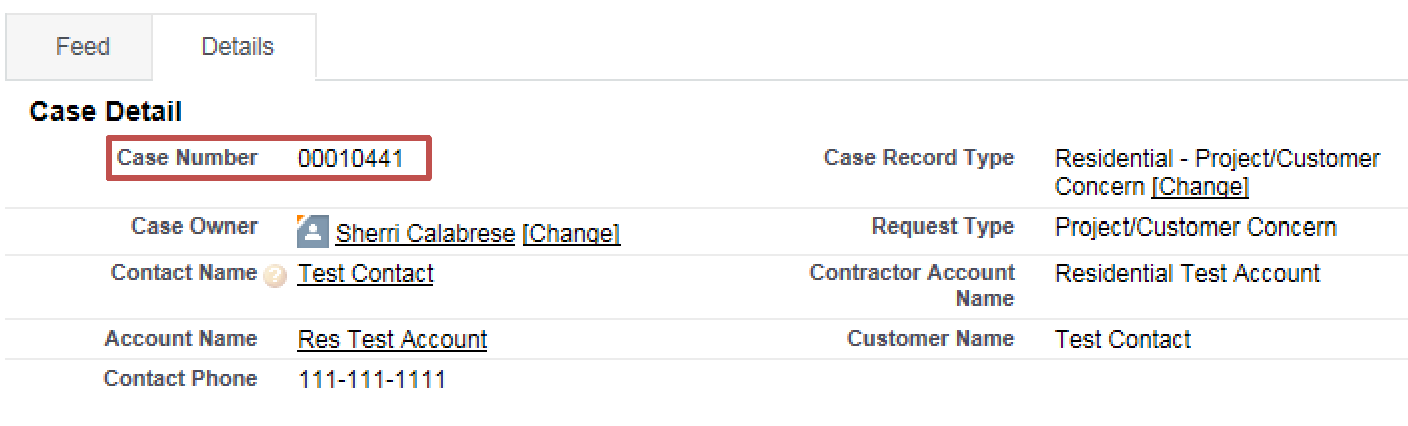
9.1 Case Number

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).



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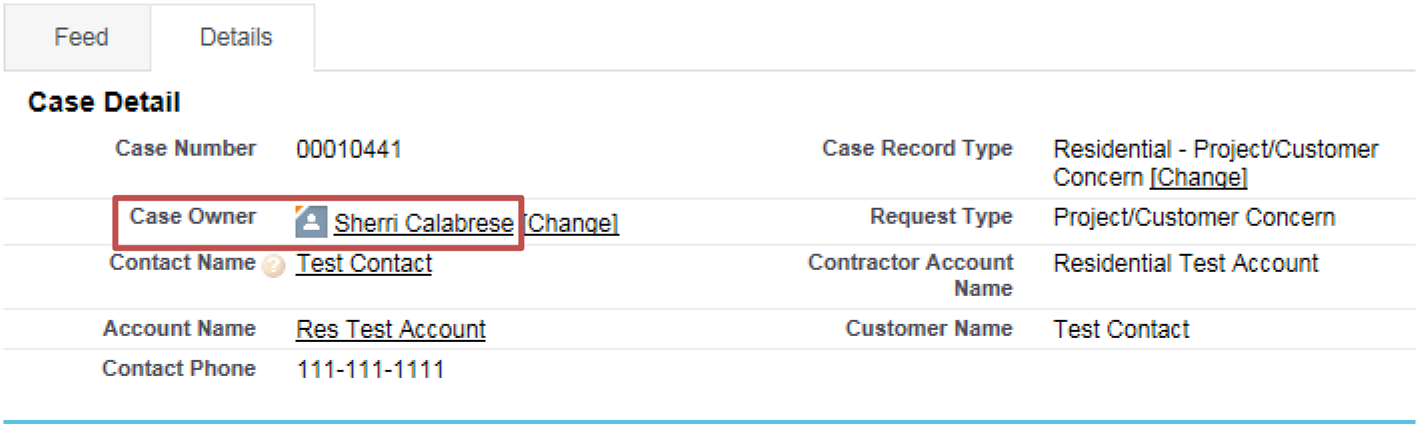
9.2 Case Owner

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



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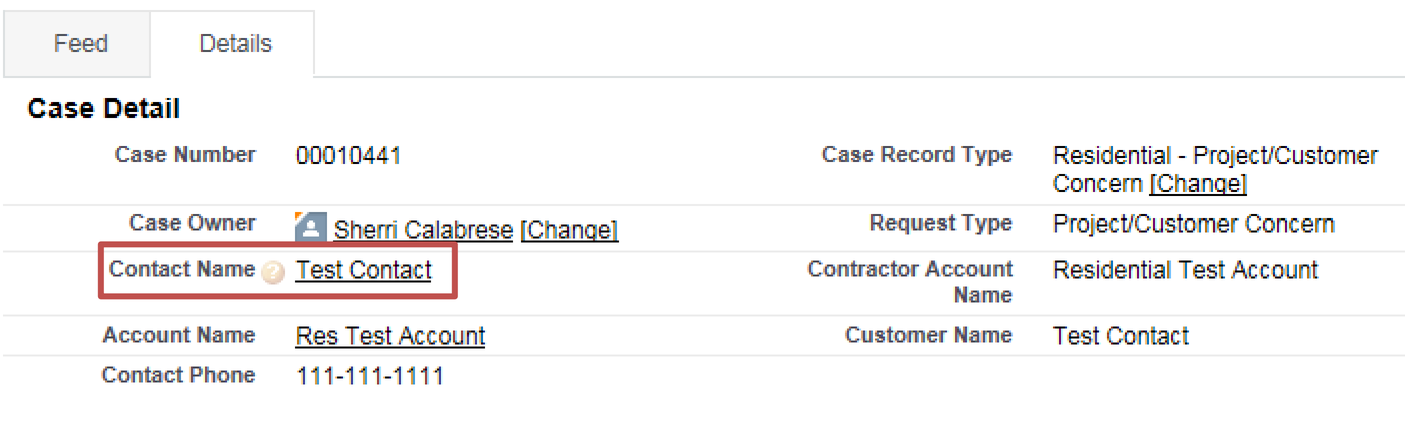
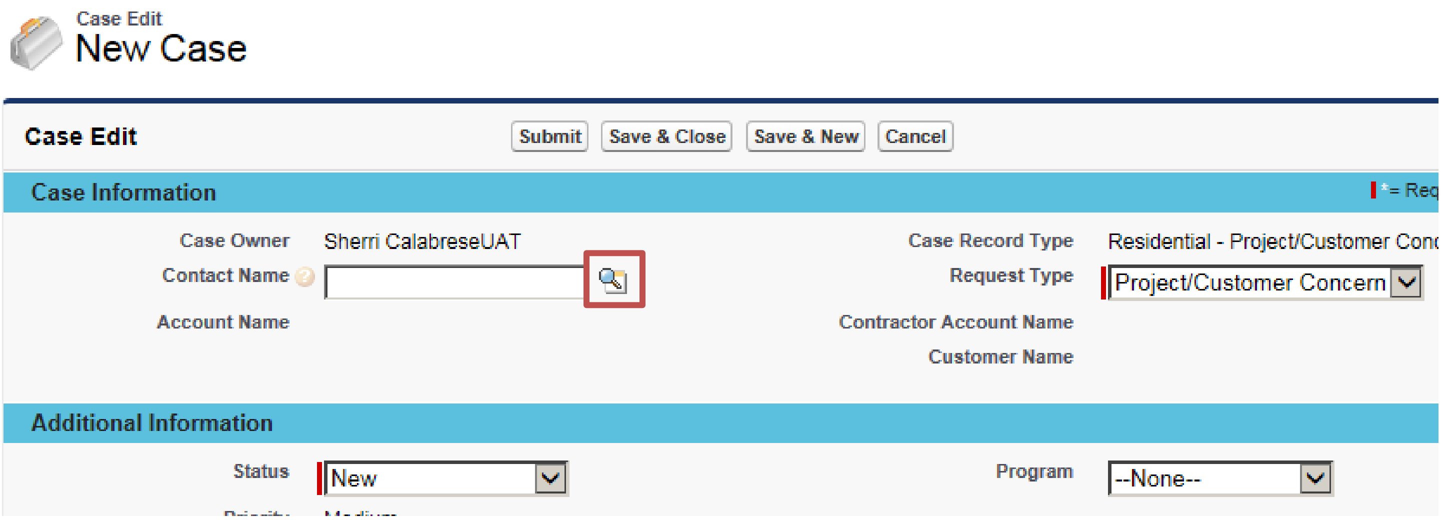
9.3 Contact Name

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.

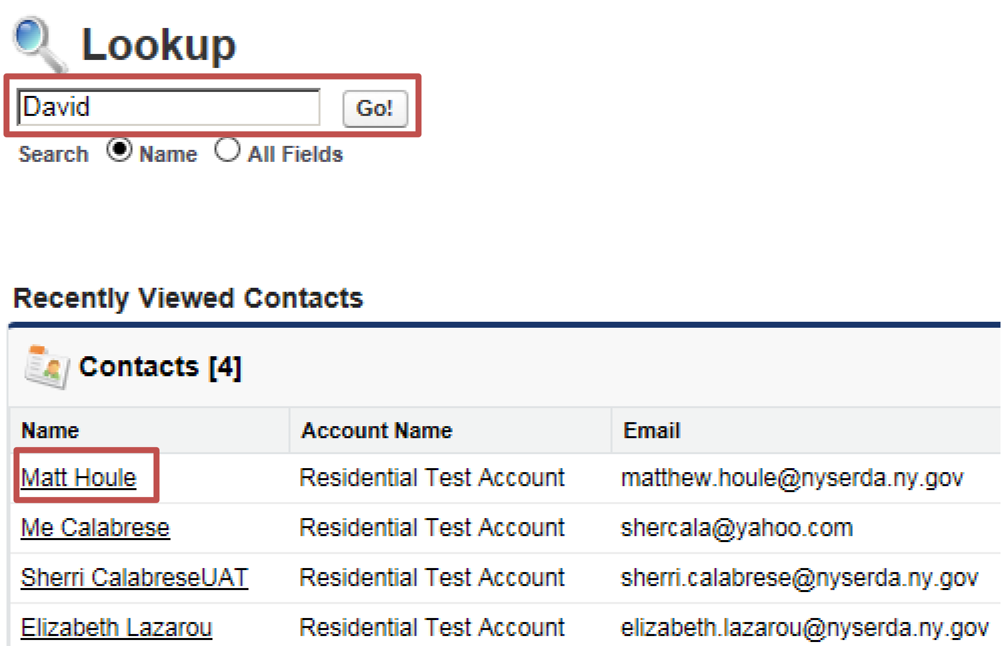


To change the Contact Name to a different user than the participating contractor, click on the magnifying glass next to the Contact Name field.



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.



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

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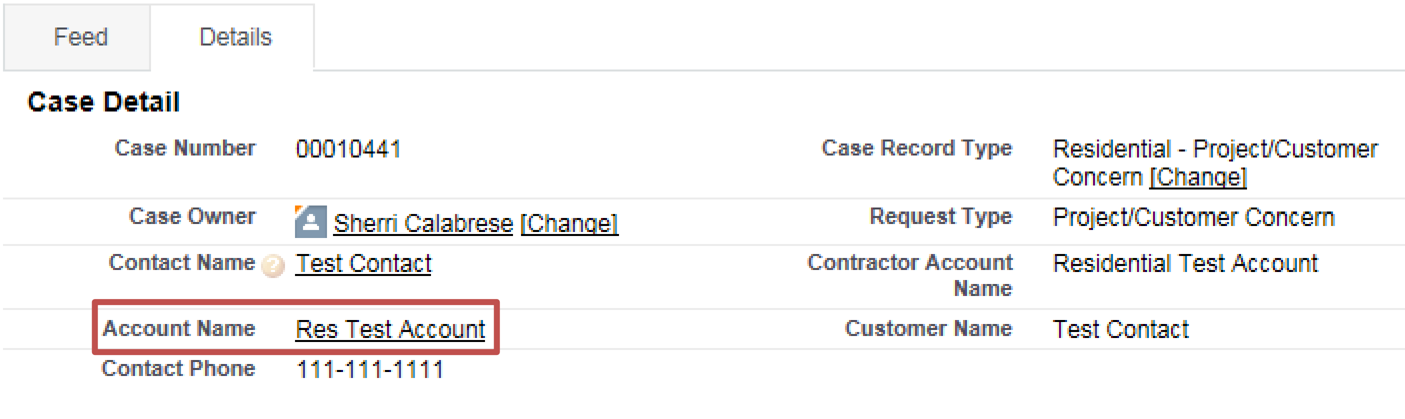
9.4 Account Name

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.



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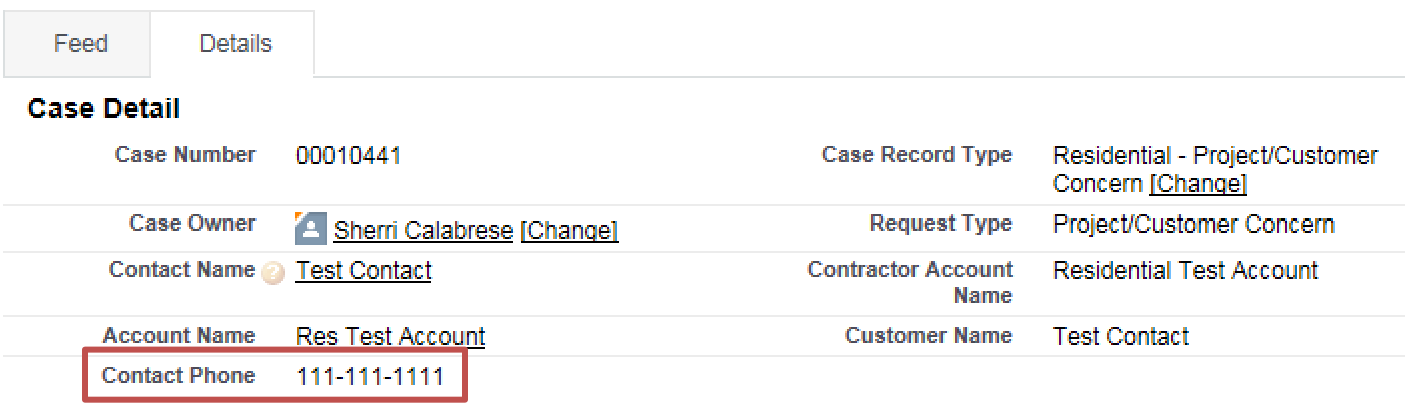
9.5 Contact Phone

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.



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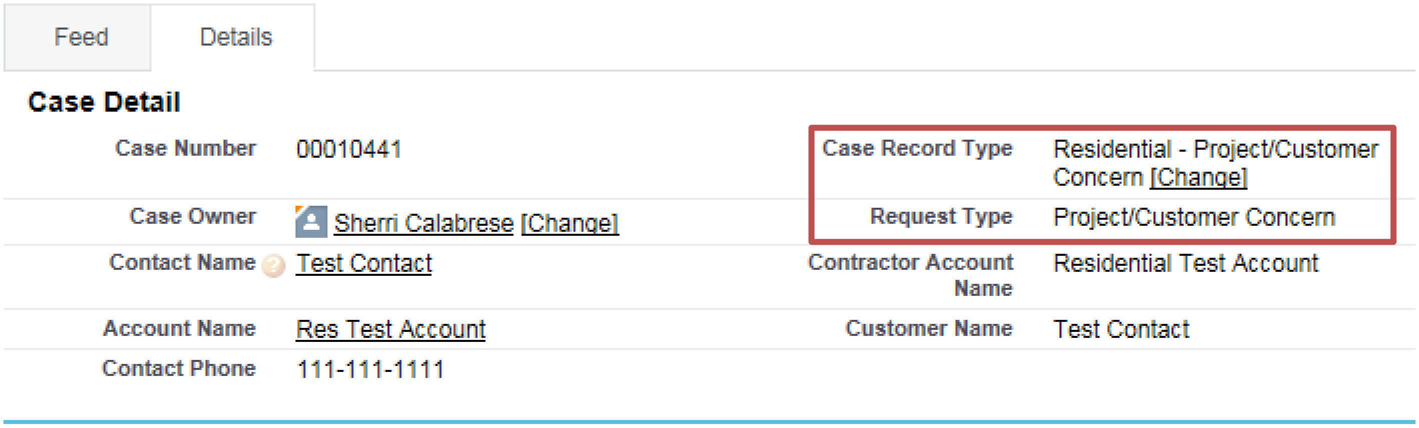
9.6 Case Record Type and Request Type

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



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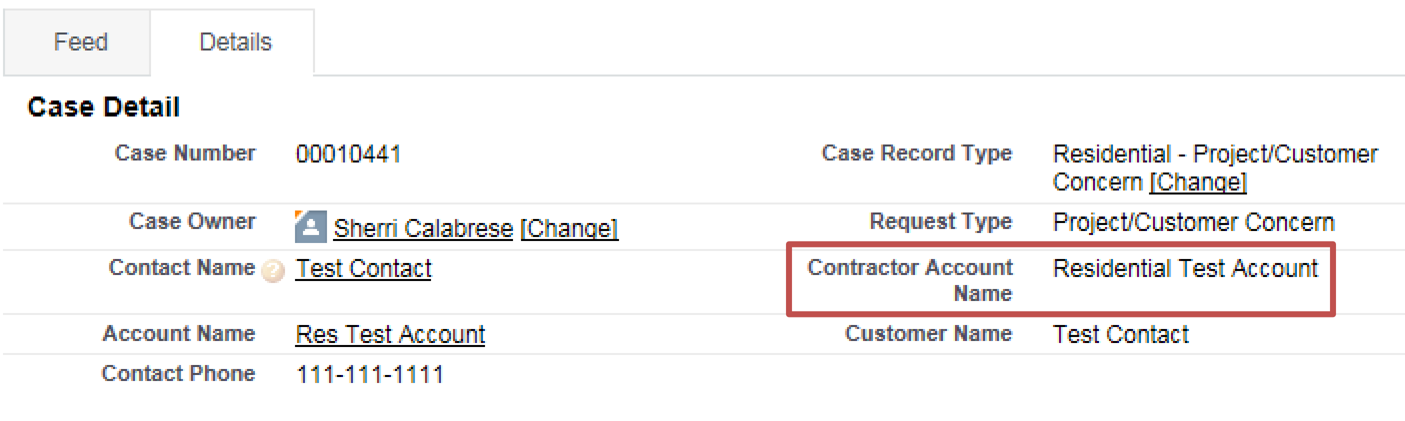
9.7 Contractor Account Name

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



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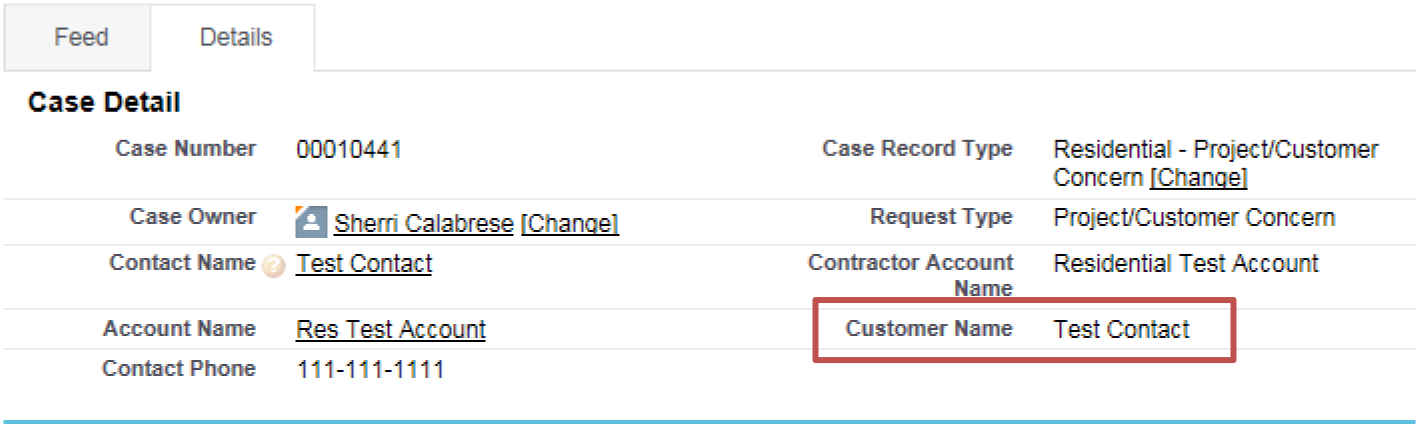
9.8 Customer Name

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



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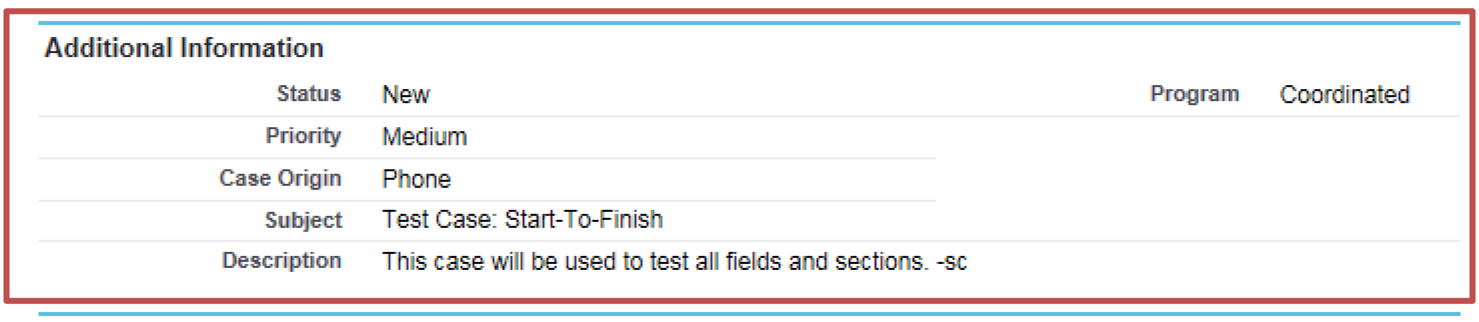
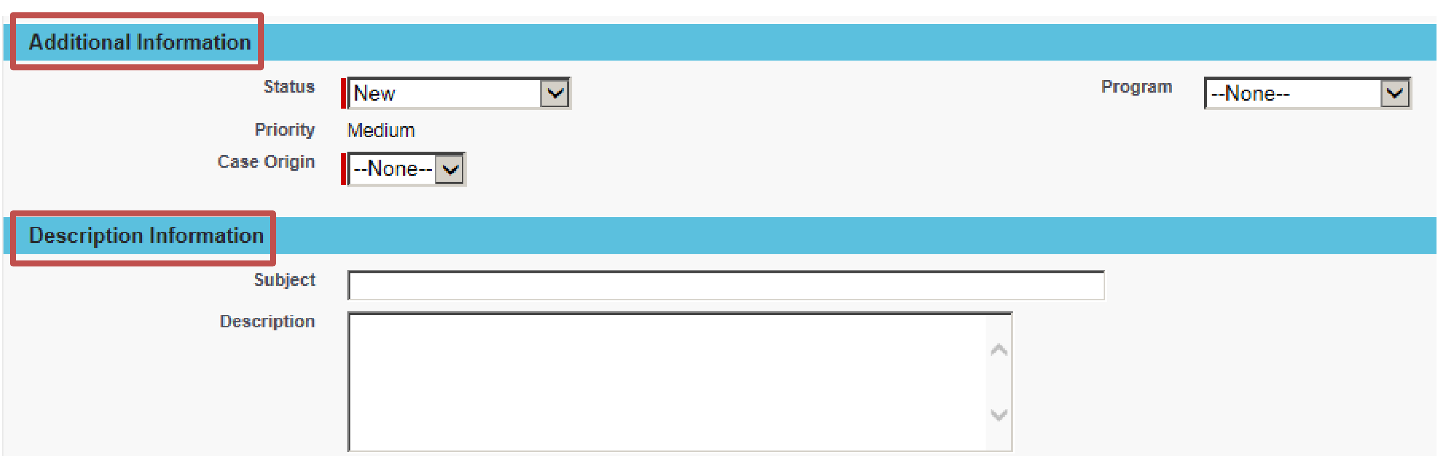
Section 10: Additional Information Case Section

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.



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



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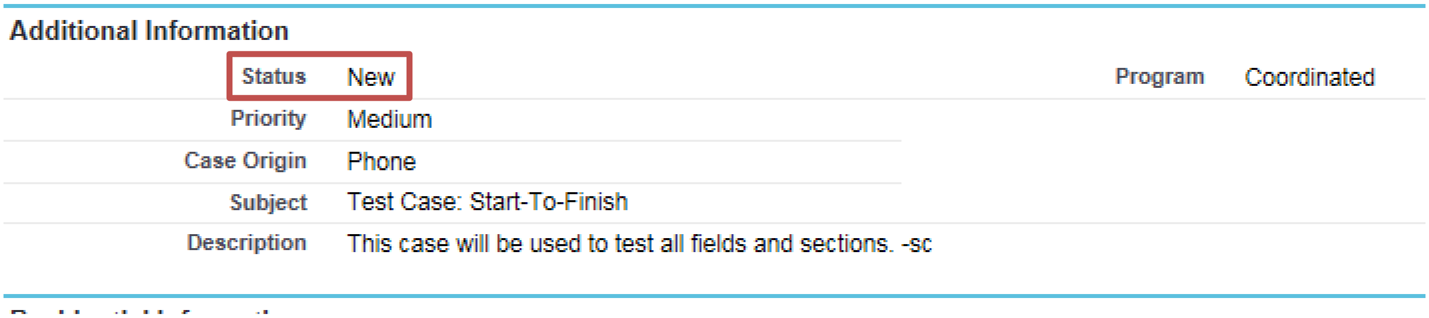
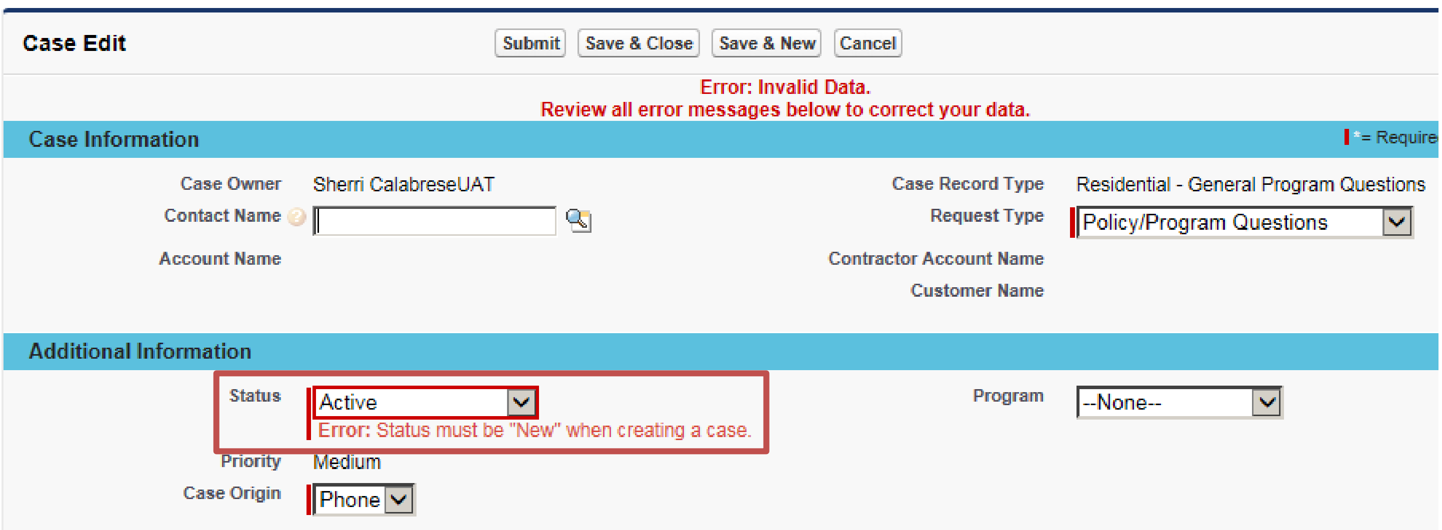
10.1 Status

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



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



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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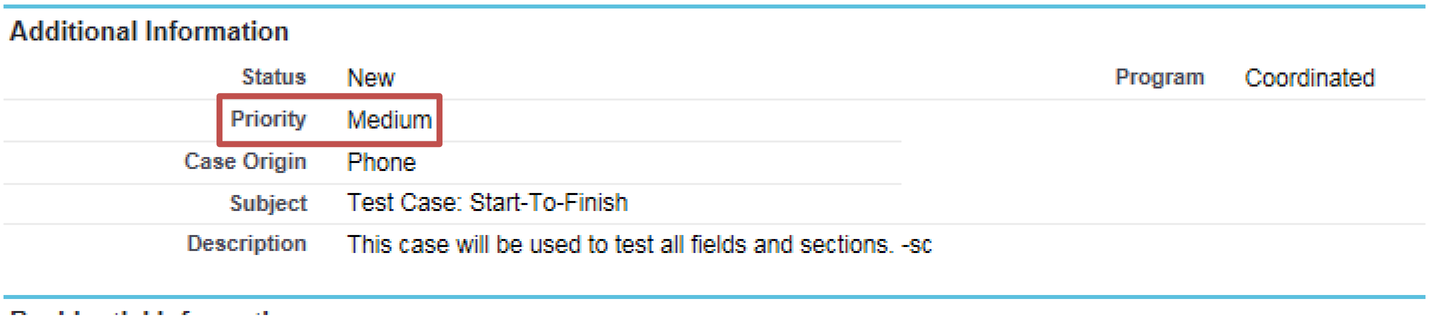
10.2 Priority

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



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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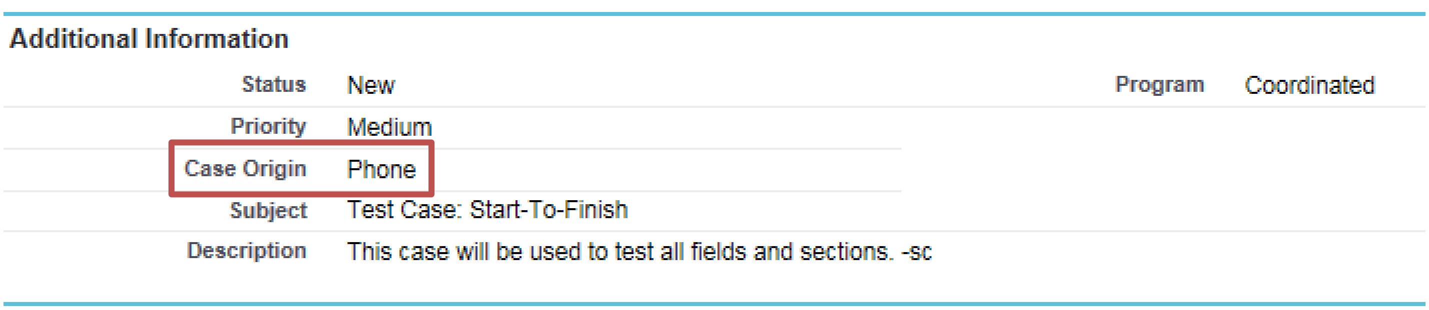
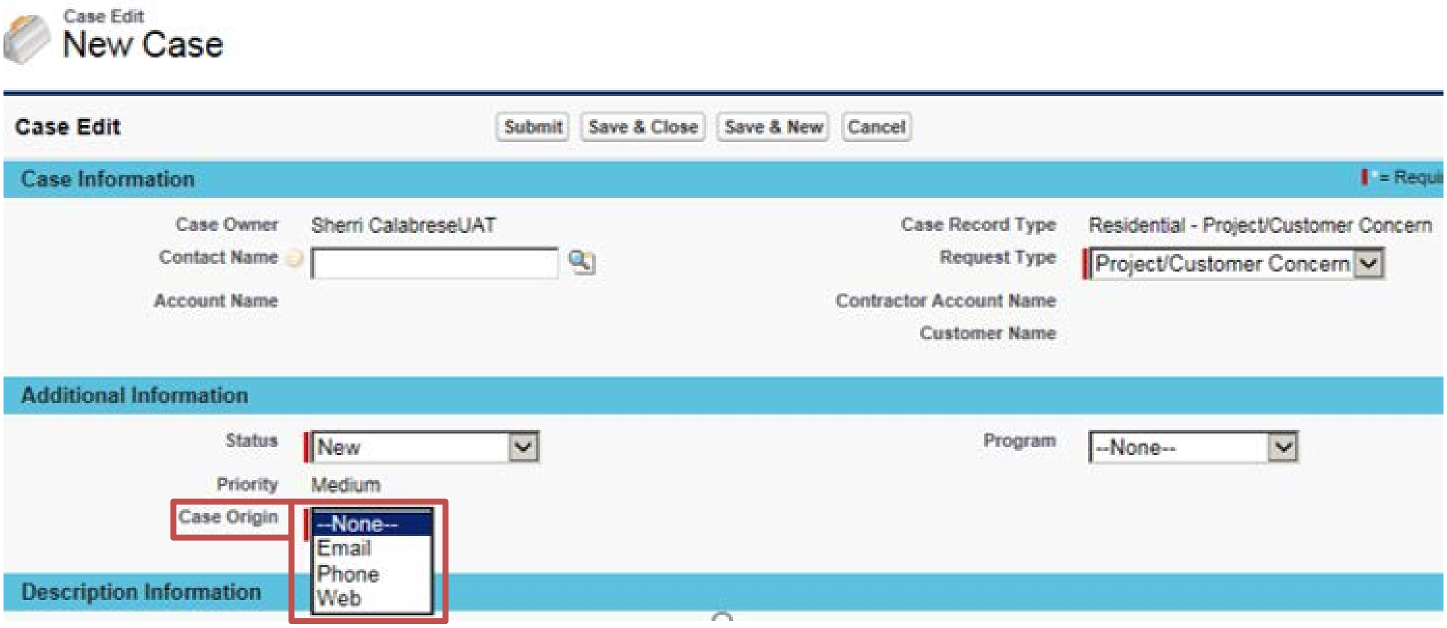
10.3 Case Origin

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.





Case Origin includes the following:

1. **Email:** Generated by an email submitted to the 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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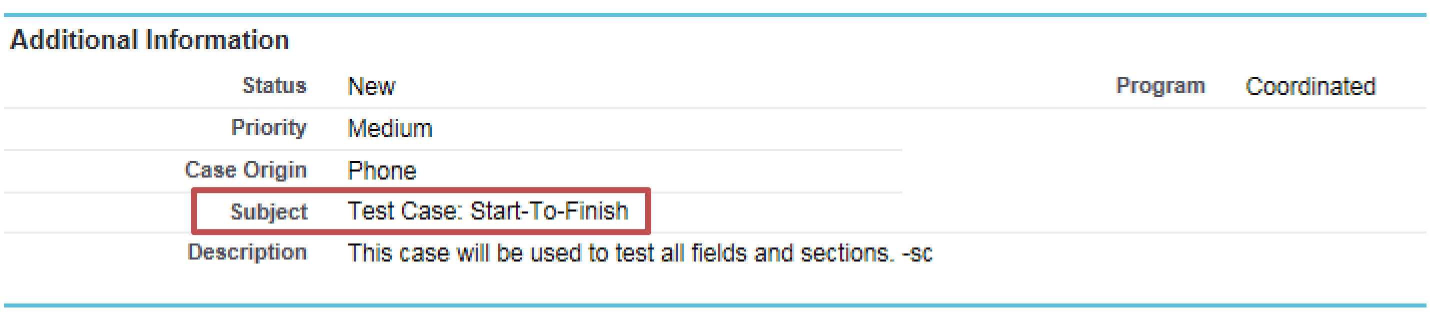
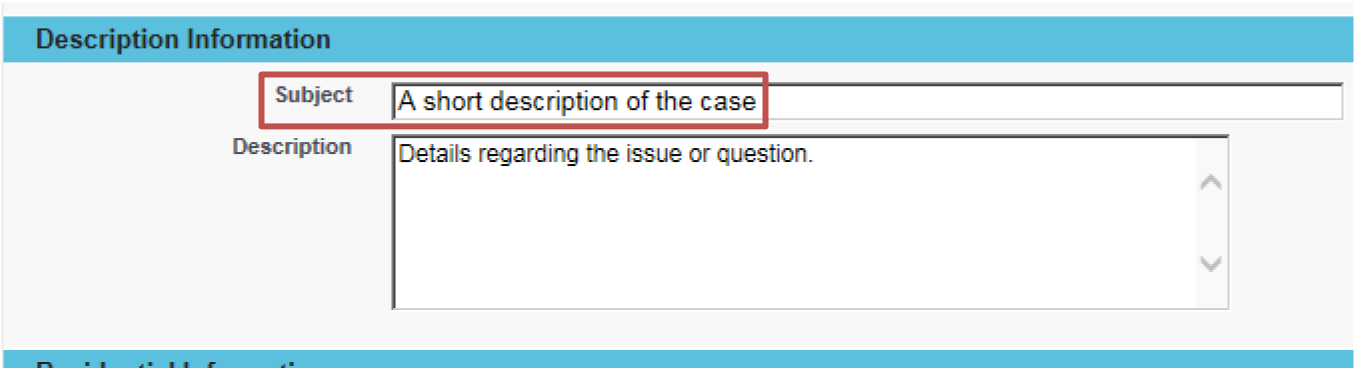
10.4 Subject

The Subject is a brief description of the support request.





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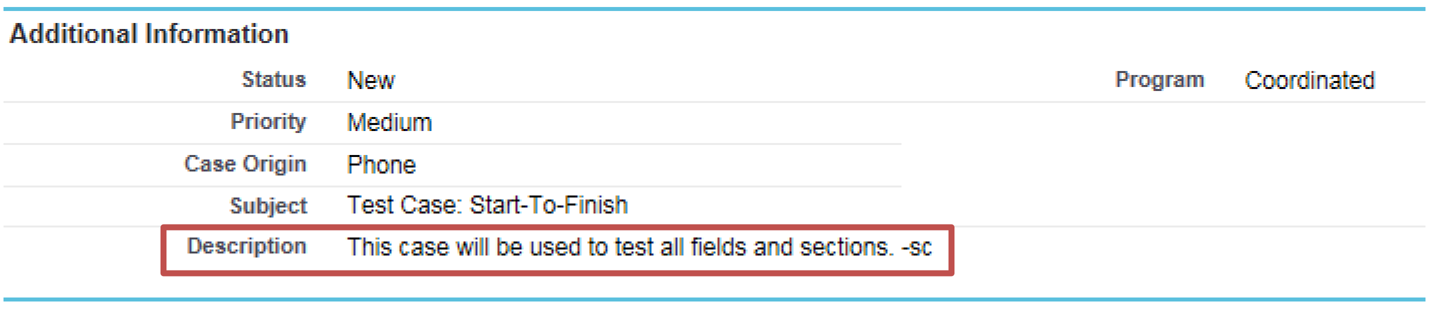
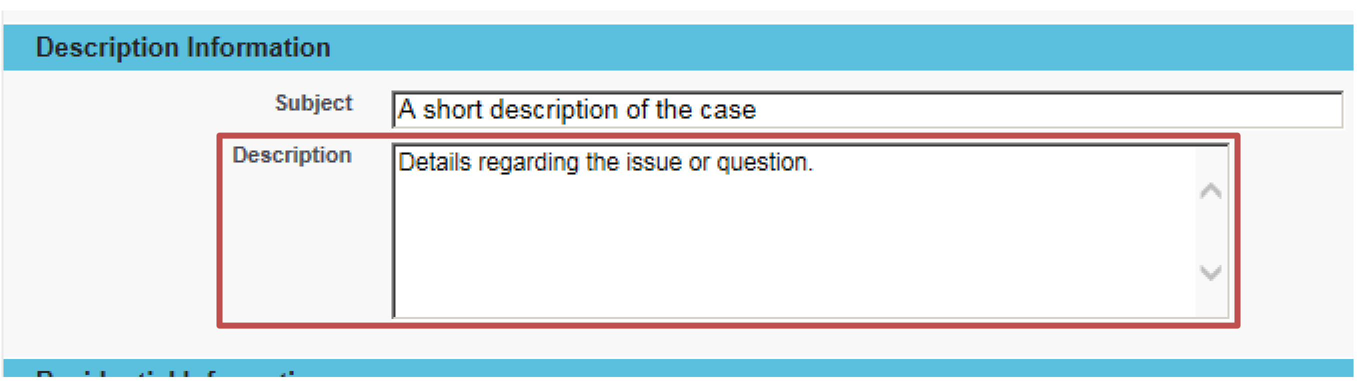
10.5 Description

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





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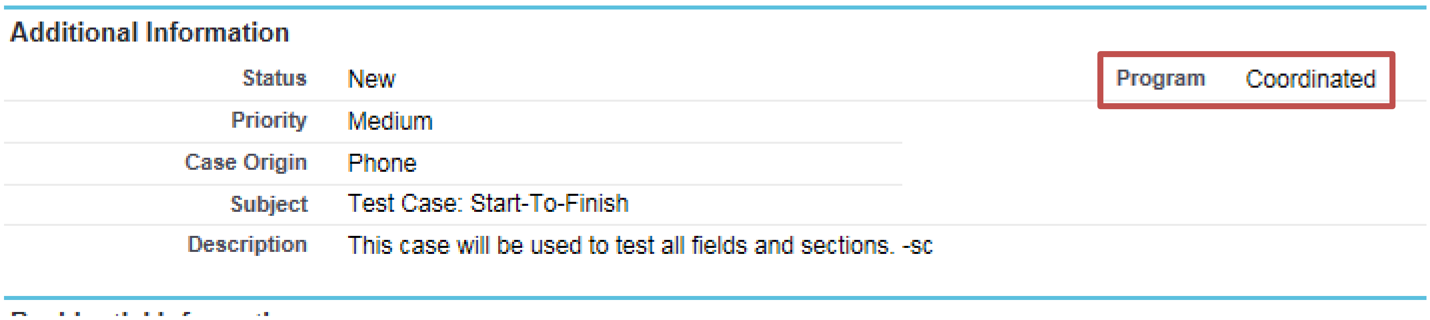
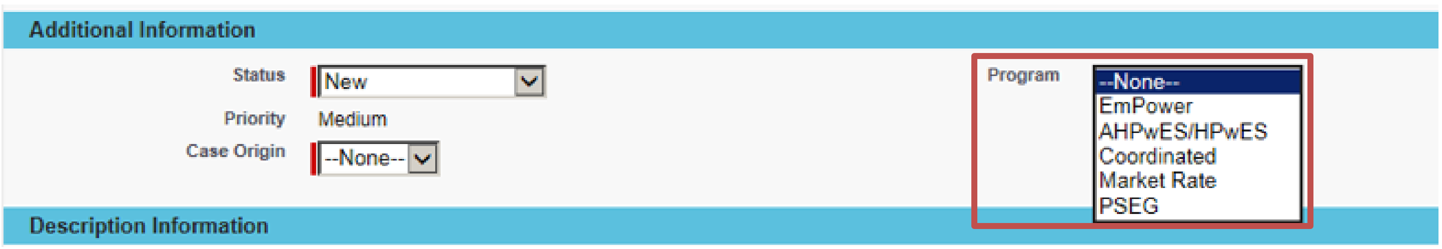
10.6 Program

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--.





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 NYSERDA (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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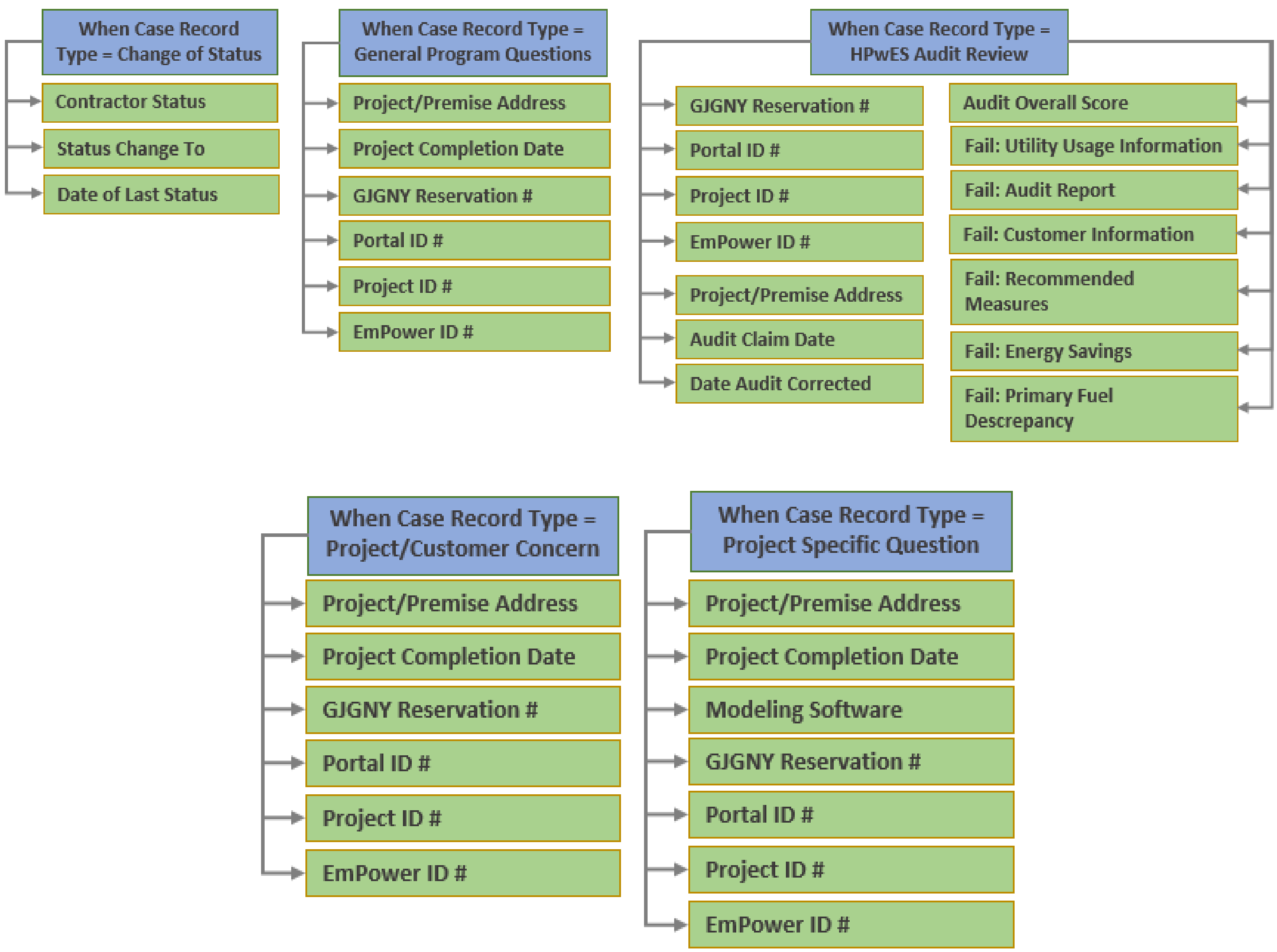
Section 11: Residential Information Case Section

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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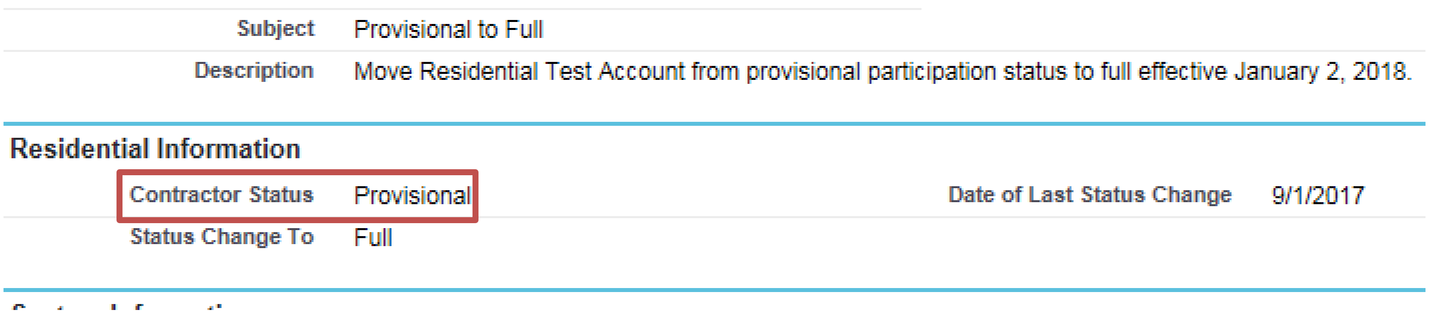
11.1 Fields

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.).



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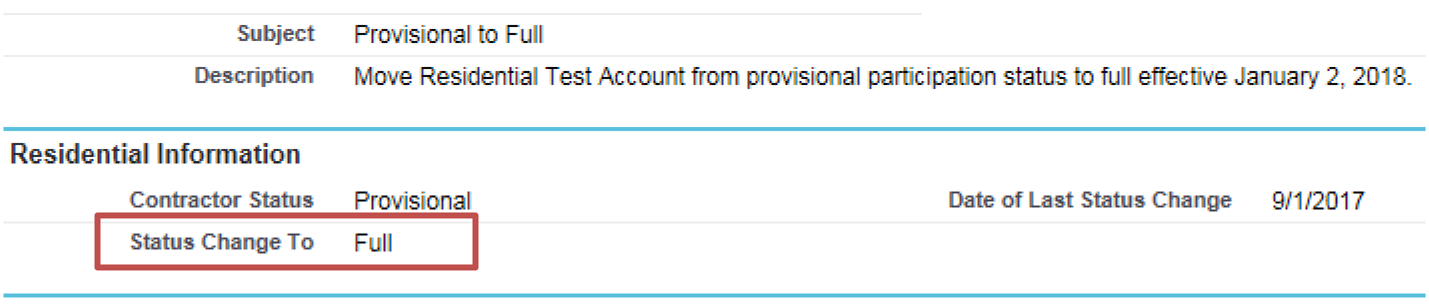
11.1.2 Status Change To Field

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



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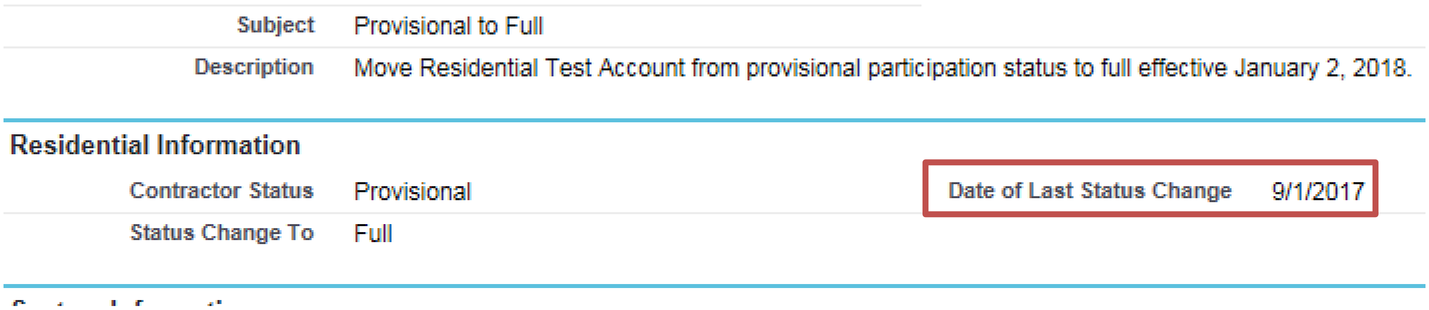
11.1.3 Date of Last Status Change

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).



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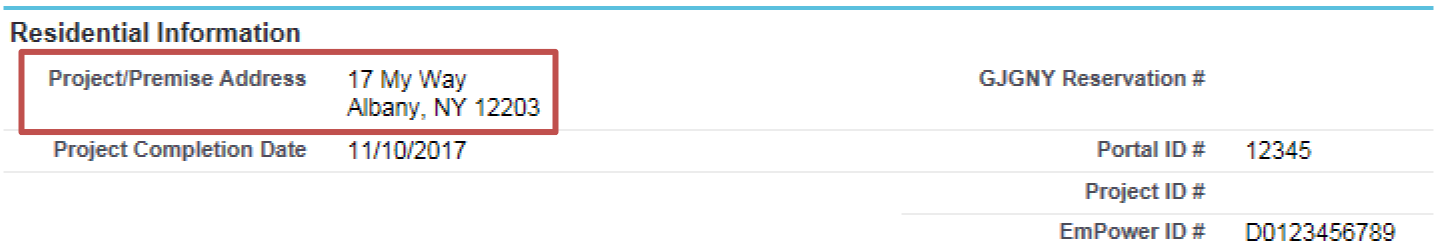
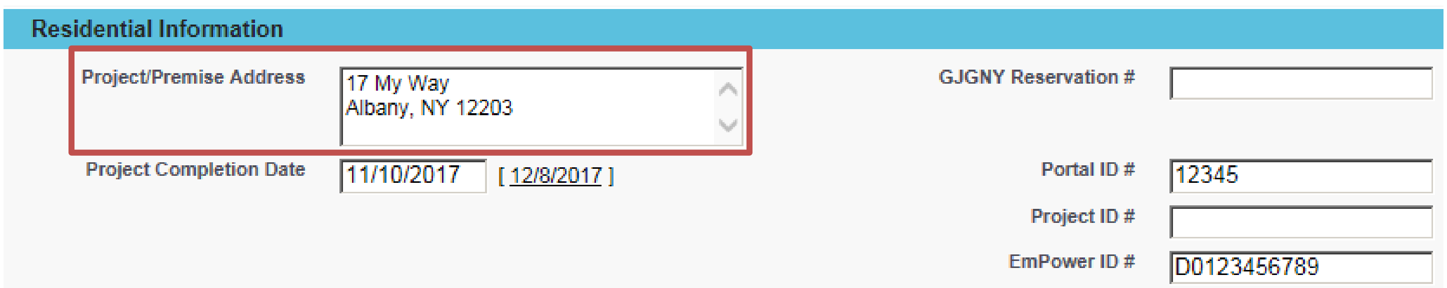
11.1.4 Project/Premise Address

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





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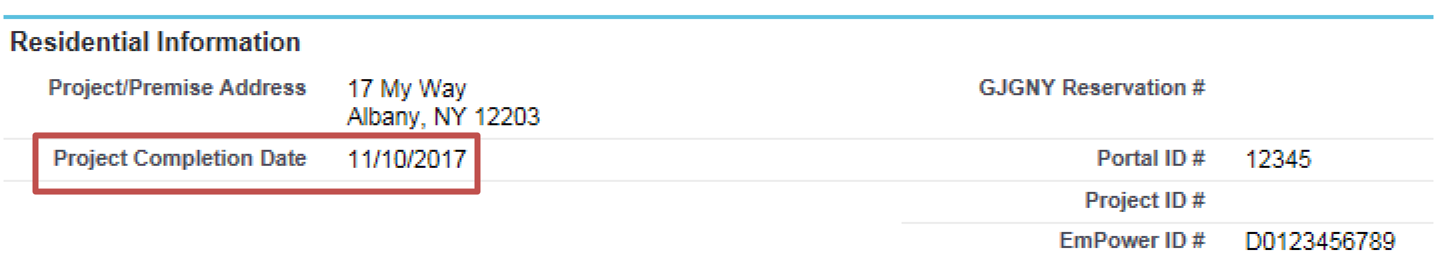
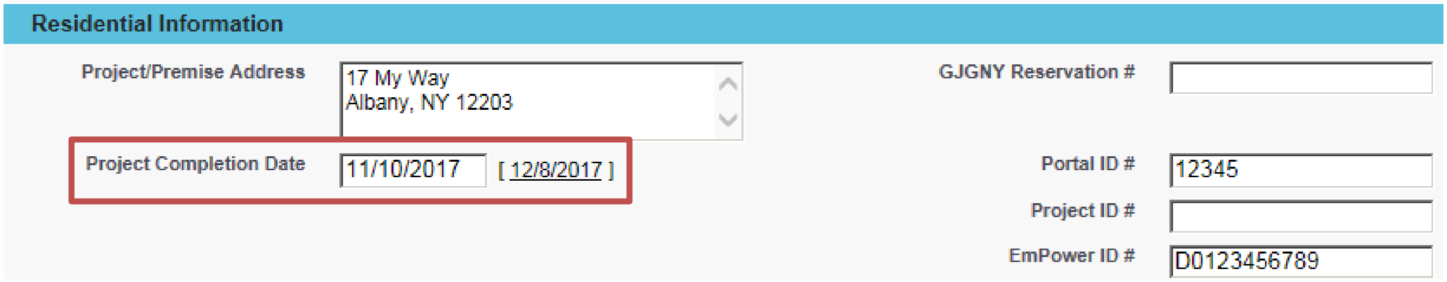
11.1.5 Project Completion Date

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





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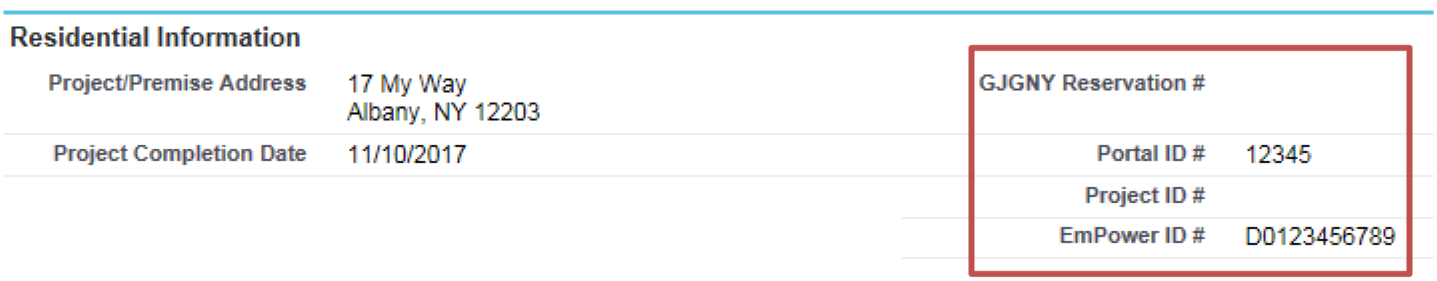
11.1.6 Project ID Number Fields

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.



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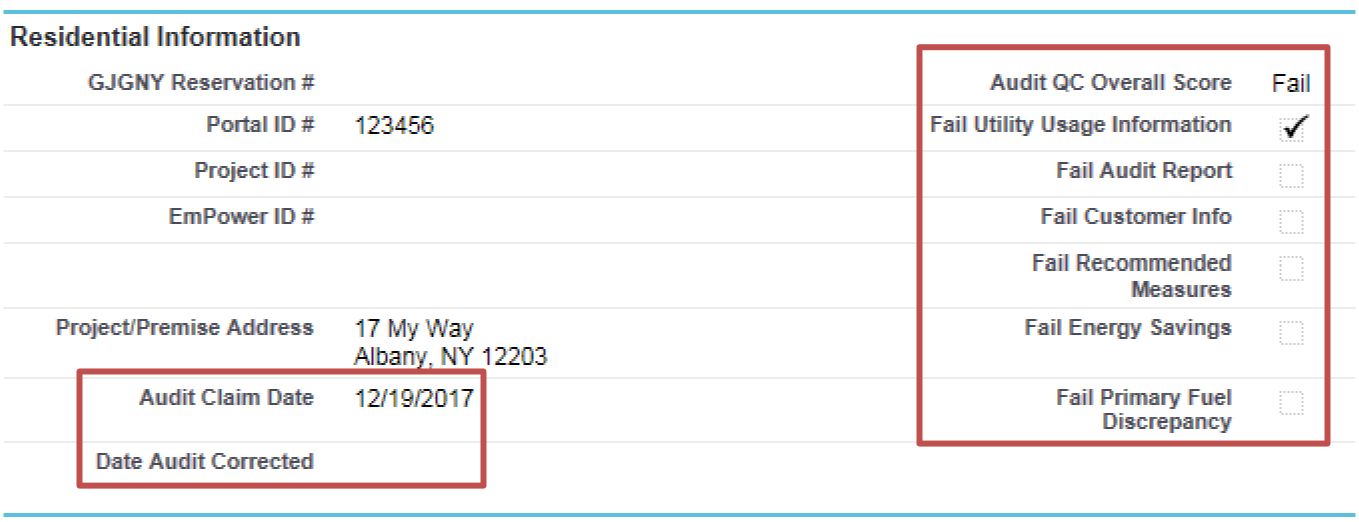
11.1.7 HPwES Audit Correction Fields

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.



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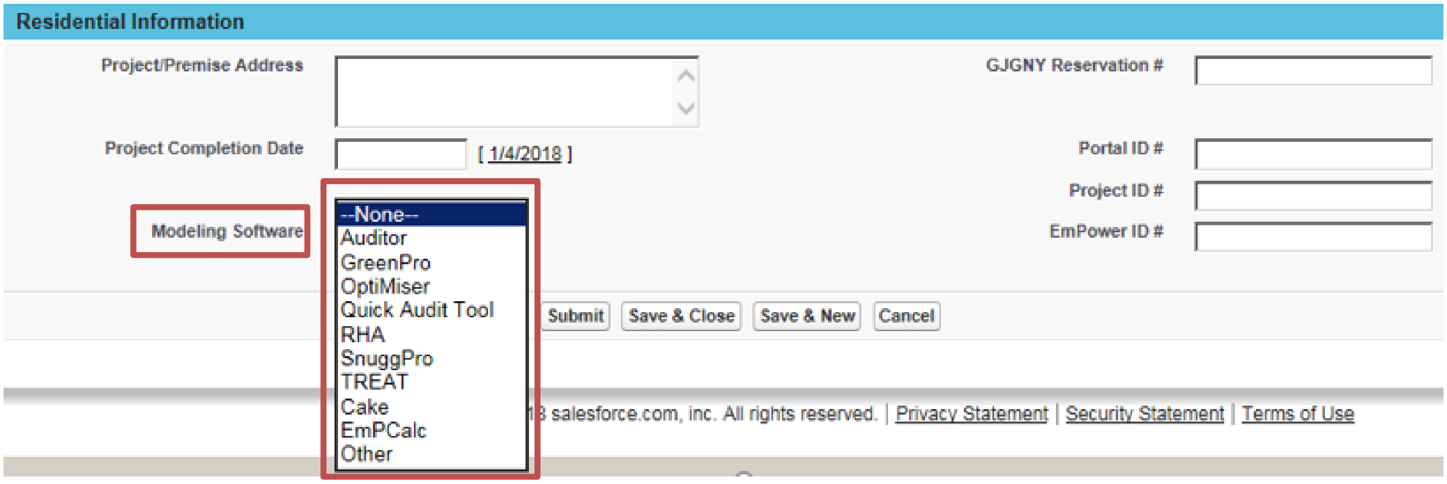
11.1.8 Other Project Specific Fields

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.



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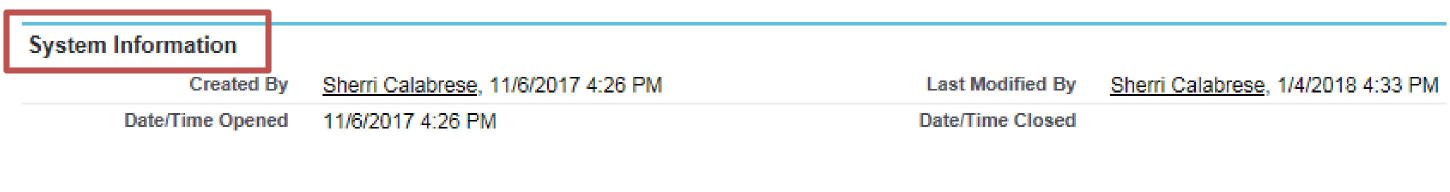
Section 12: System Information Case Section

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



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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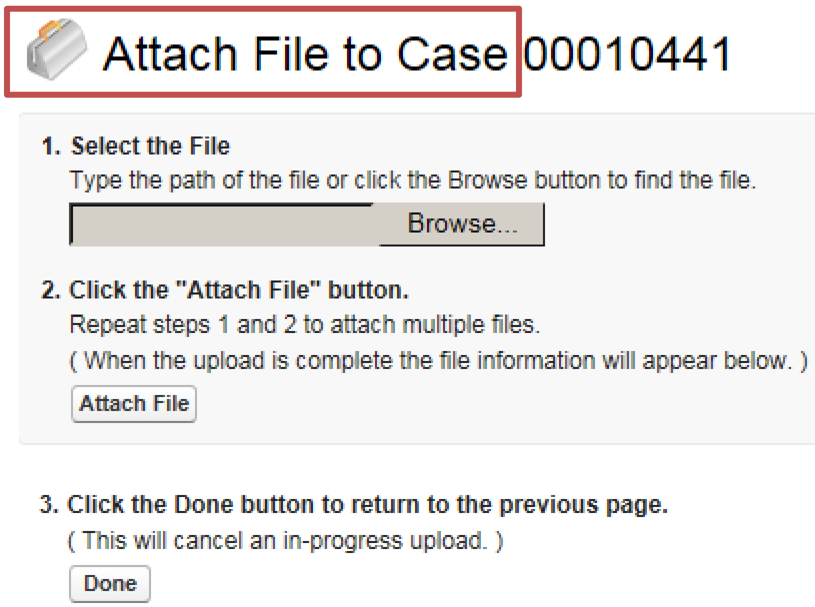
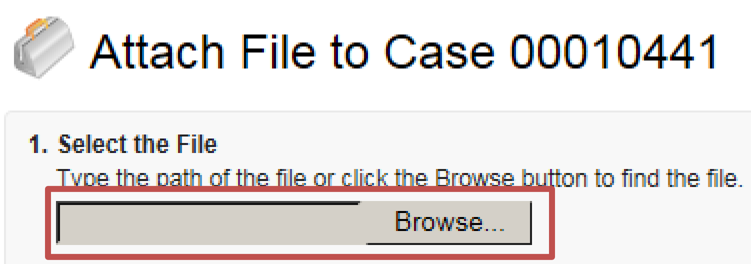
13.1 Attaching Documents in the Attachments Section

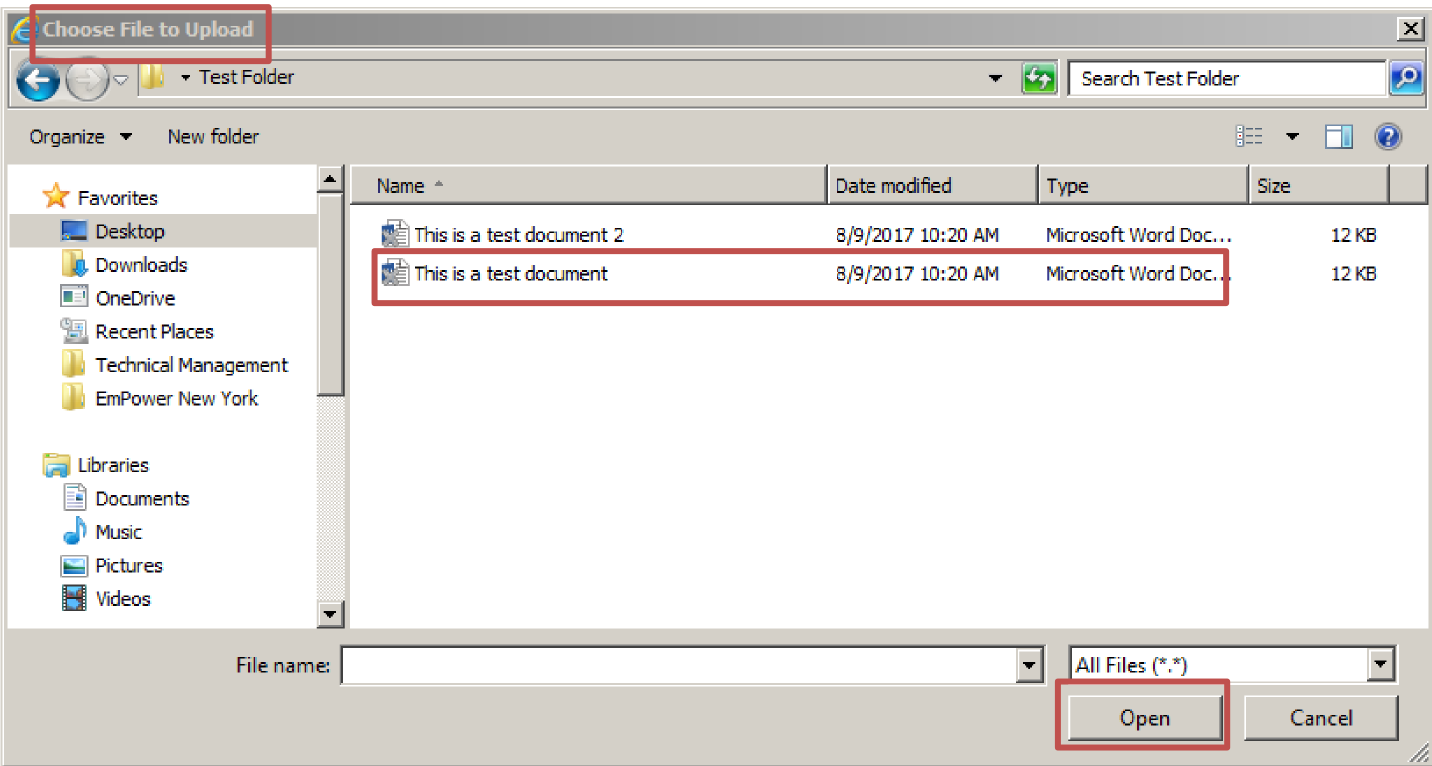
To attach documents to the case from the Attachments section, click the Attach File button in the Attachments section.

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.

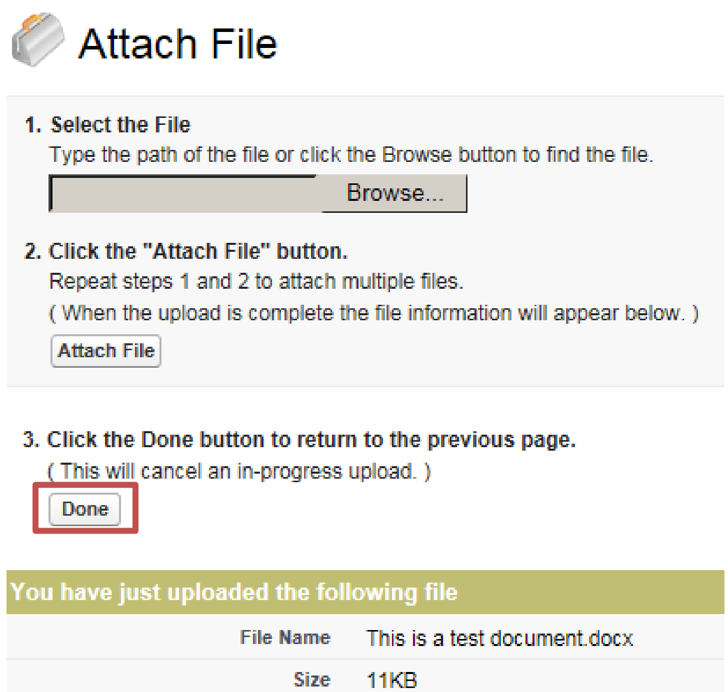




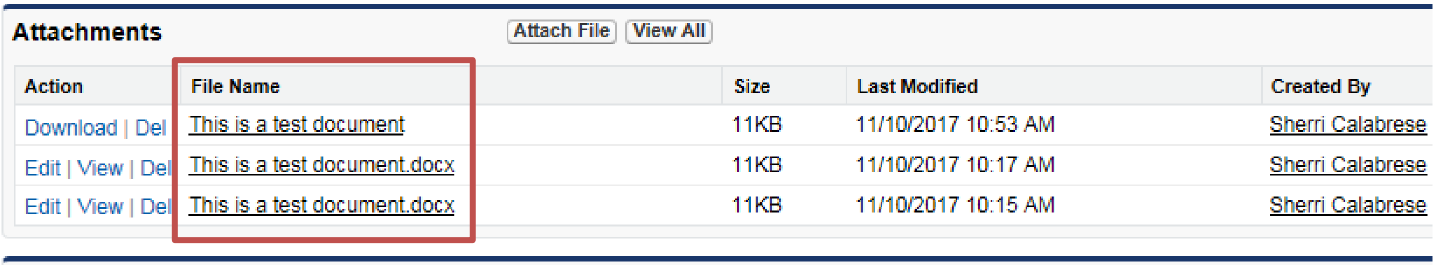
2. Next, click the Attach File button to attach the file selected during step 1.

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

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.



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



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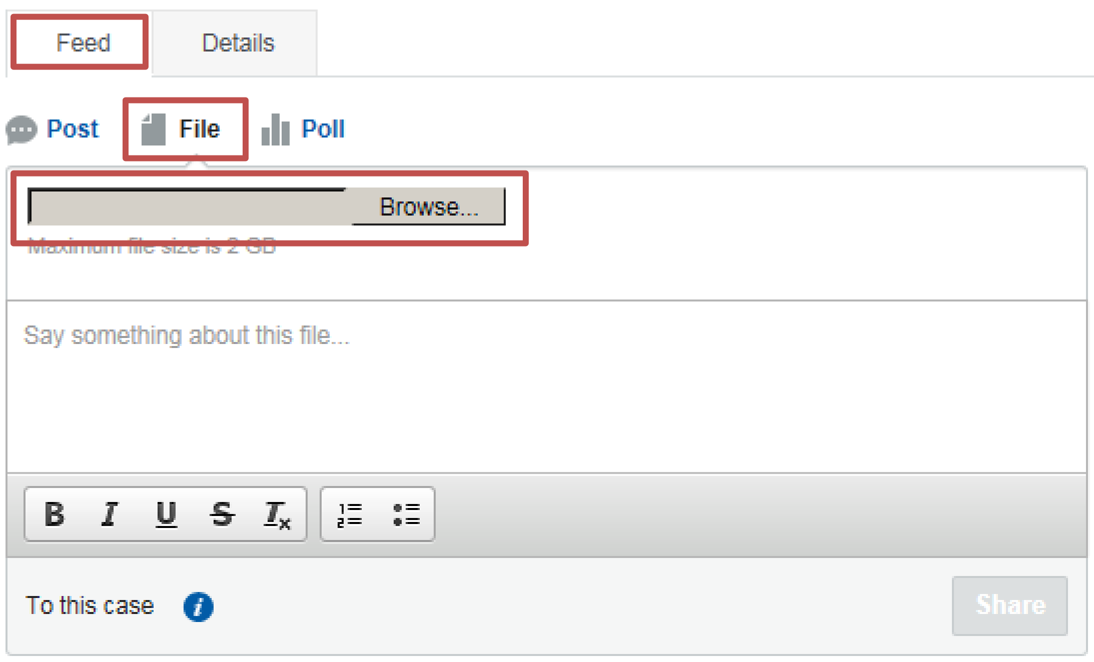
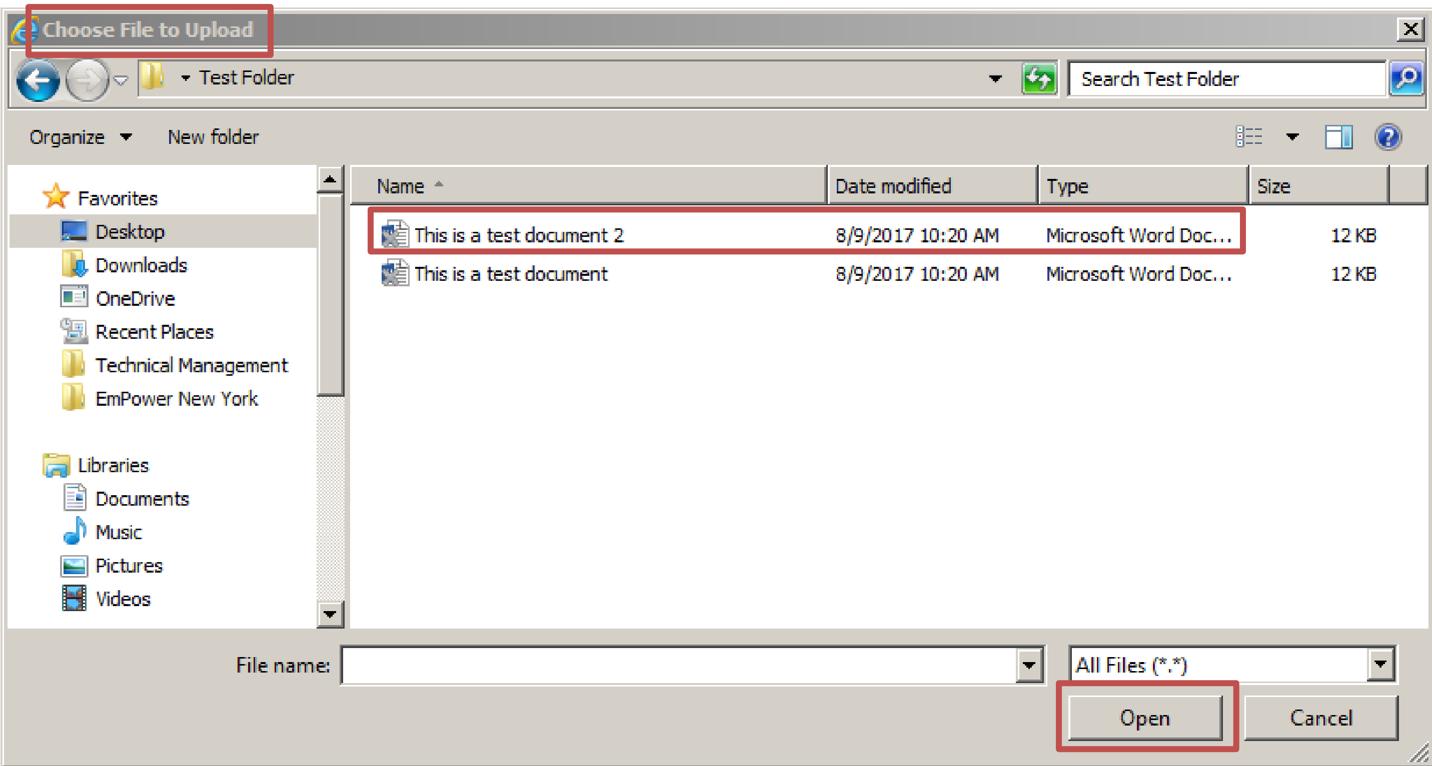
13.2 Attaching Documents in the Feed

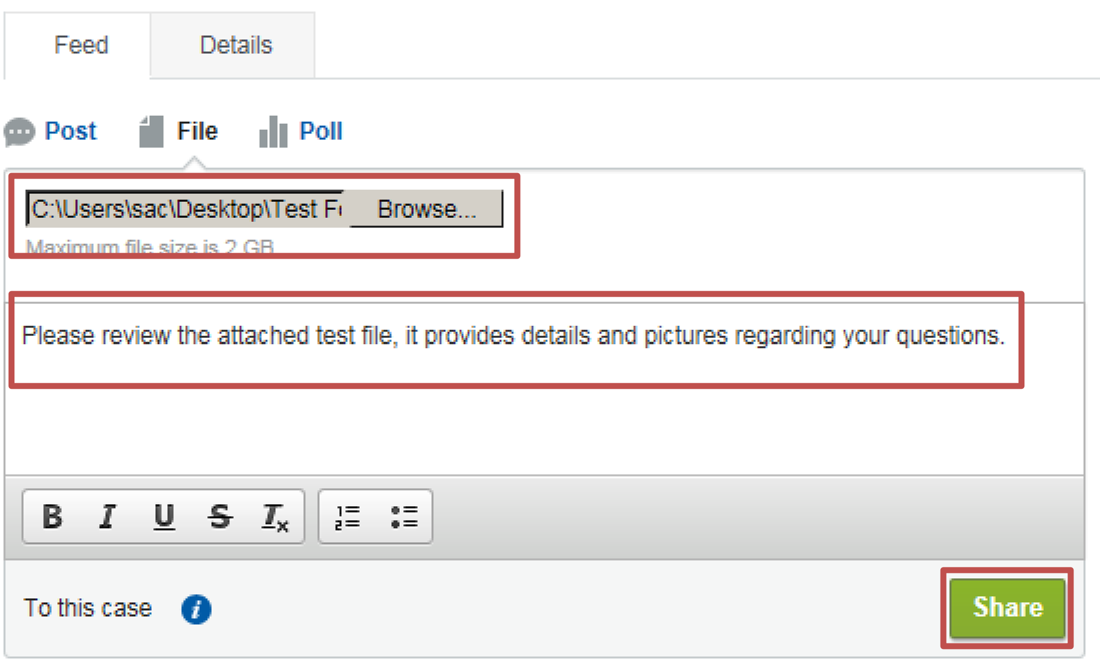
To attachment documents through the feed, click on the Feed tab of a case and then File. Selecting File expands the dialog box to include the Browse… button.



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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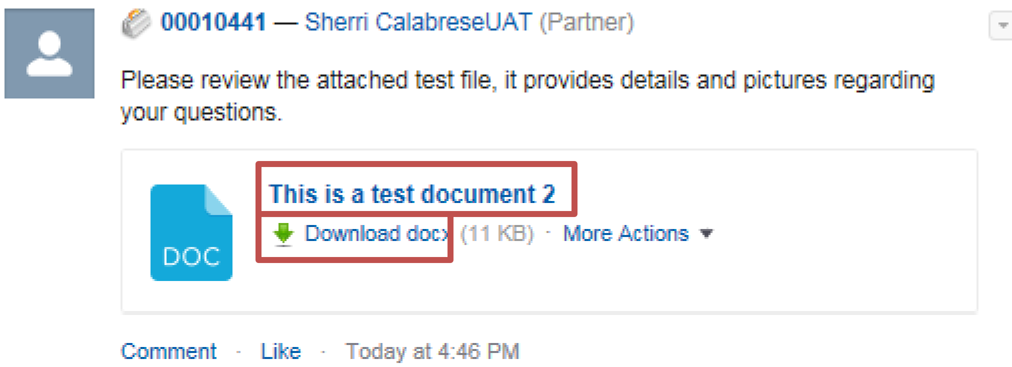
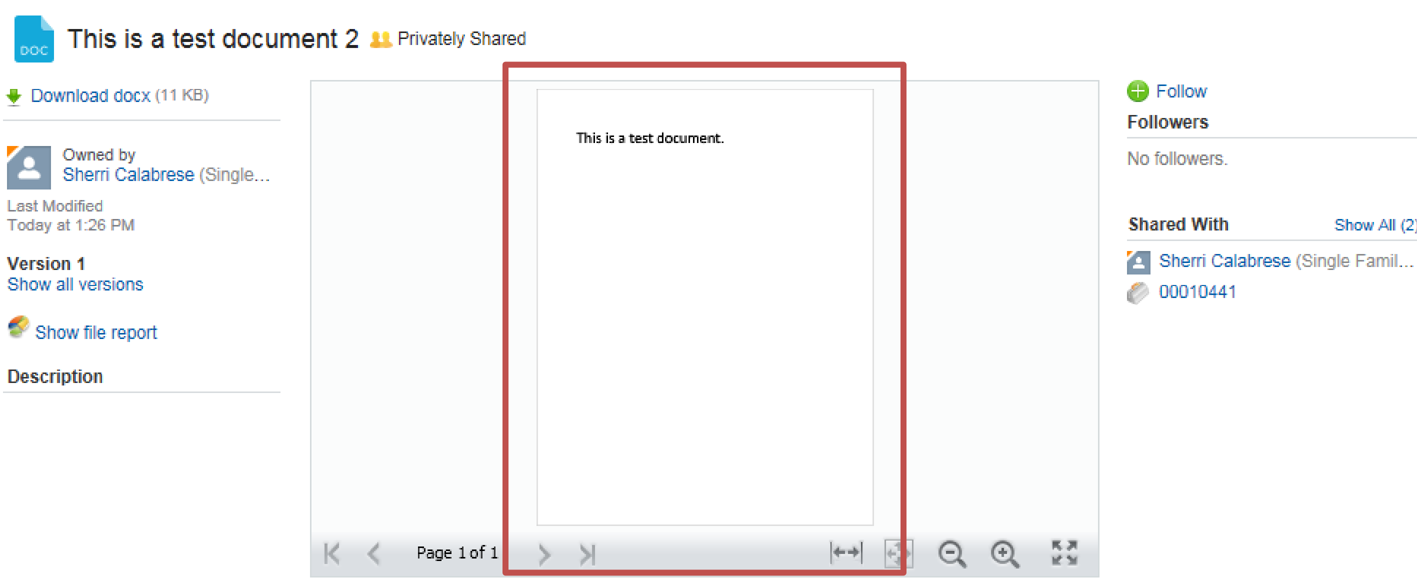
13.3.1 Opening an Attachment from the Feed

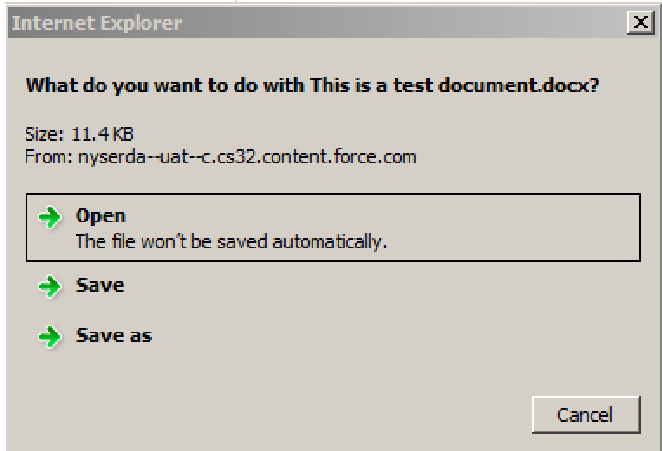
To open an attachment from the feed post, navigate to the appropriate post and either click the file title link or select the Download link.



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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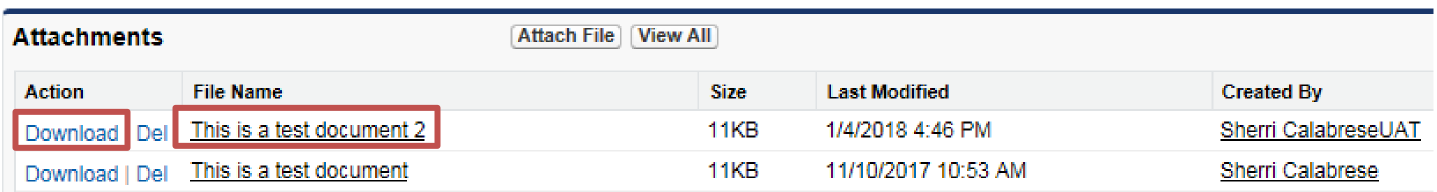
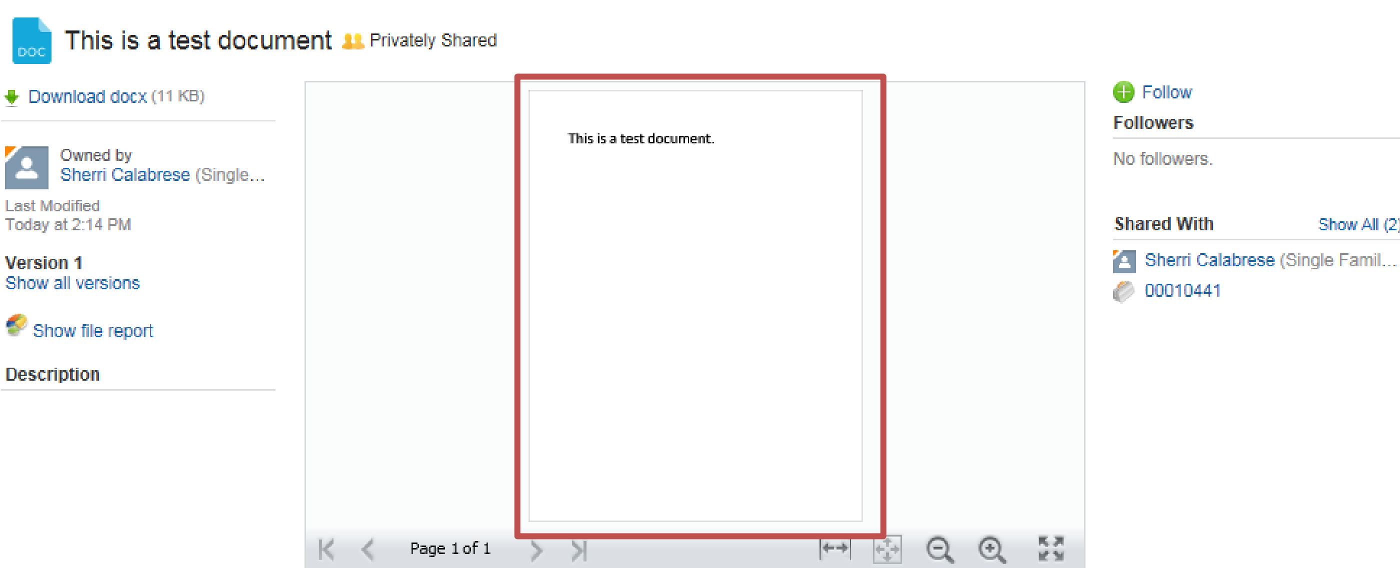
13.3.2 Opening an Attachment from the Attachments Section

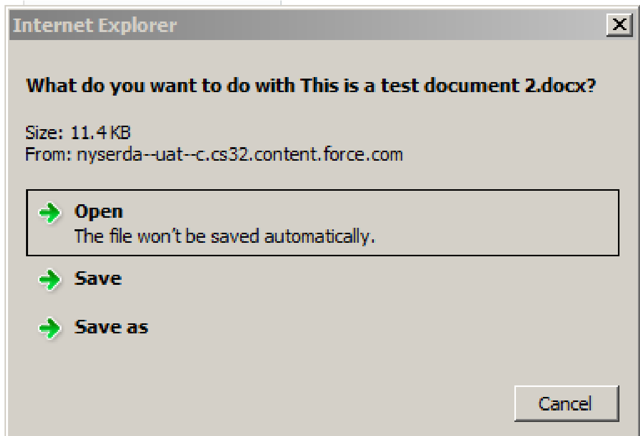
From the Details tab, navigate to the Attachments section. Either click on the File Name link or the Download link.



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



Selecting the Download link opens the download options.



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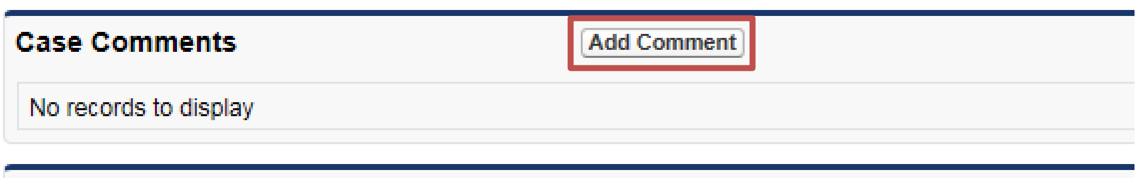
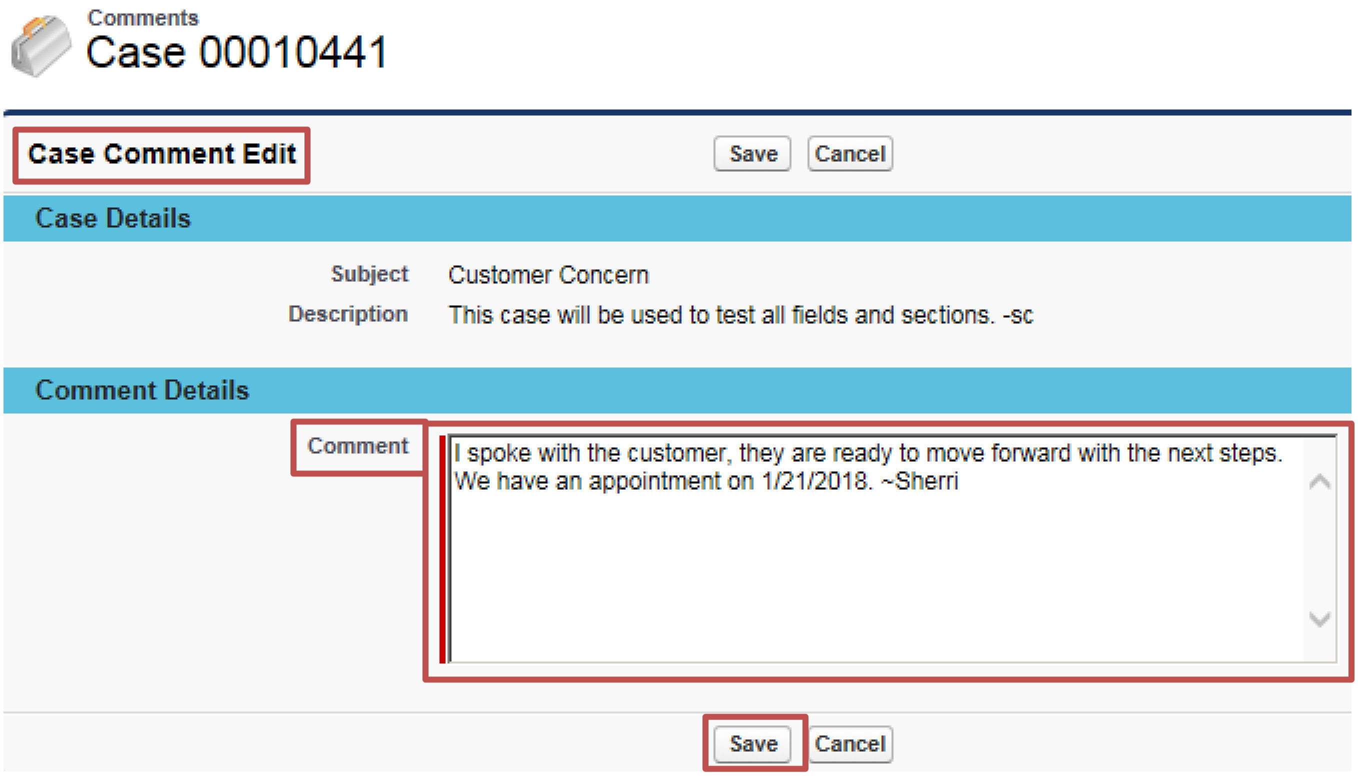
Section 14: Case Comments

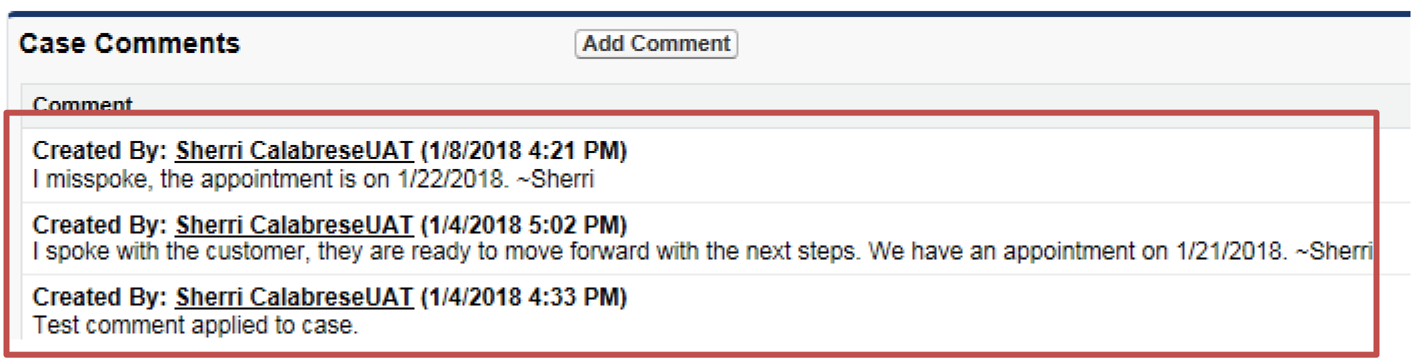
The Case Comments section of the case is an area for posting updates and/or notes related to the case. To post a case comment, navigate to the Case Comments section and click the Add Comment button.



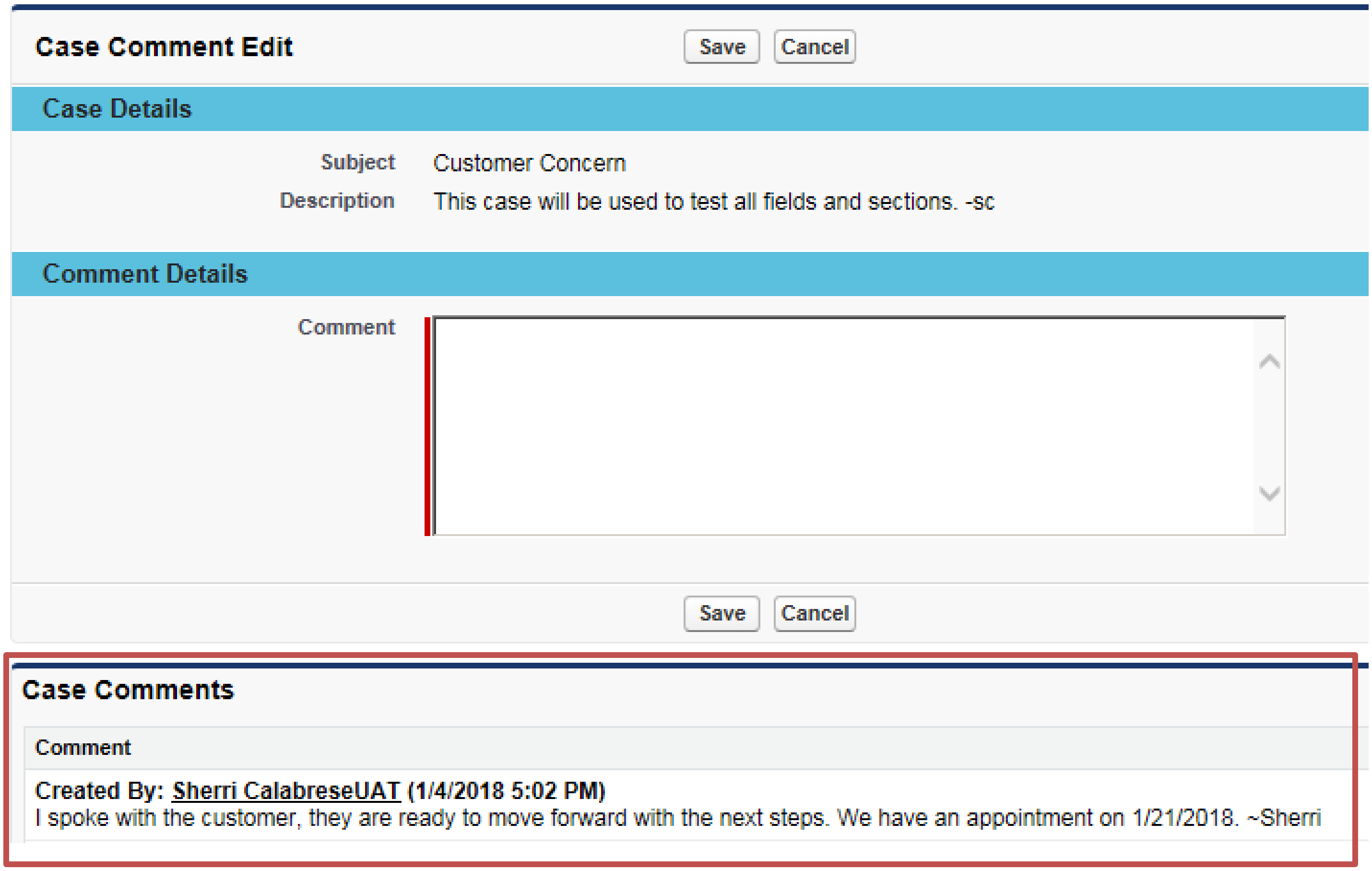
Clicking the Add Comment button opens the Case Comment Edit page. From the Case Comment Edit page, type information into the Comment box. Click Save.



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



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



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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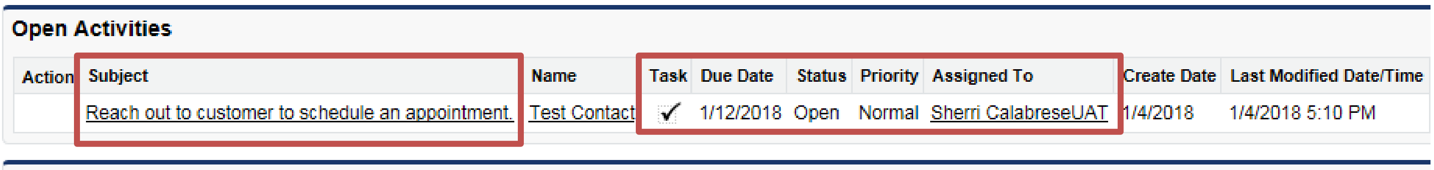
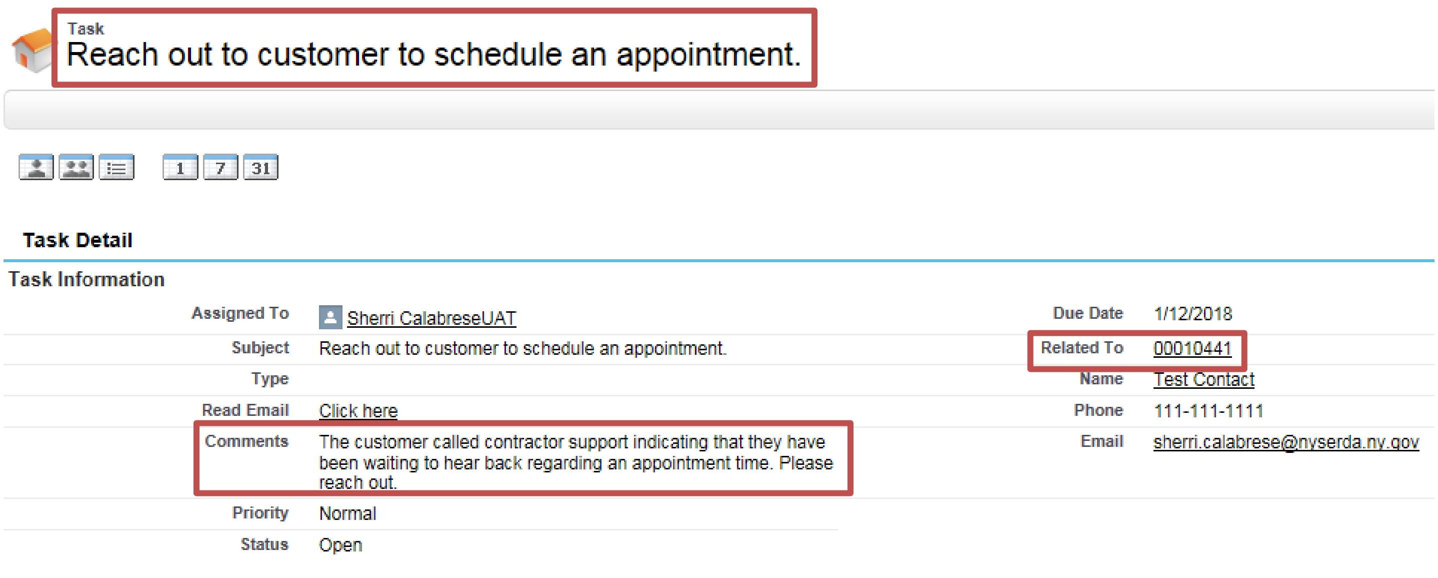
15.1 Tasks

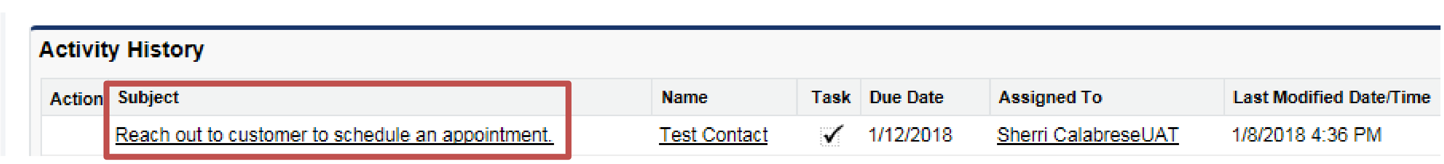
Open tasks on a case are in the Open Activities section. In this example, a task has been assigned to reach out to the customer with a due date of 1/12/18 and was assigned to Sherri CalabreseUAT. Tasks on a case are actions that should be taken. Tasks can be assigned to any user associated with the participating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



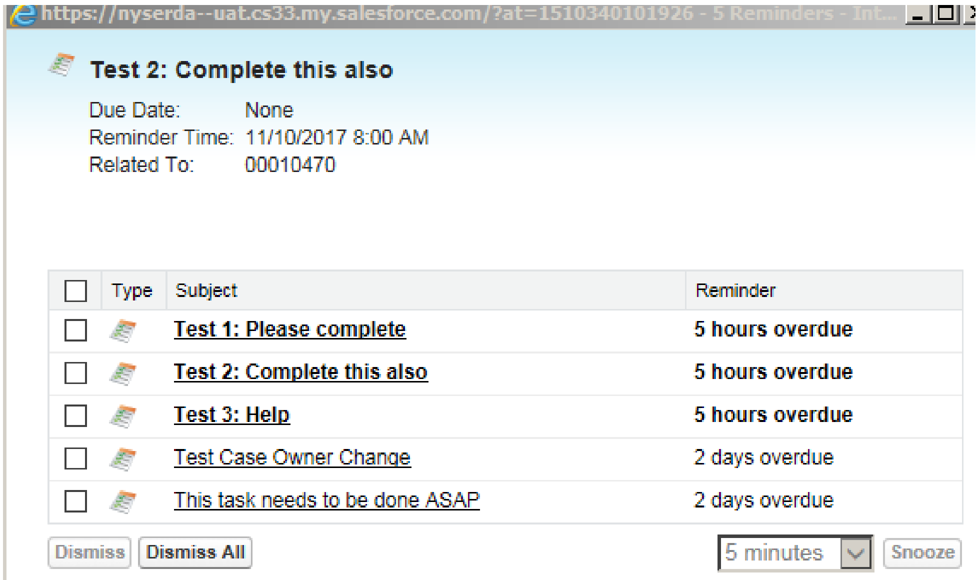
Clicking the Subject link opens the Task page to the details associated with the task. To navigate back to the case from the Task page, either click the back button or click on the Related To link.



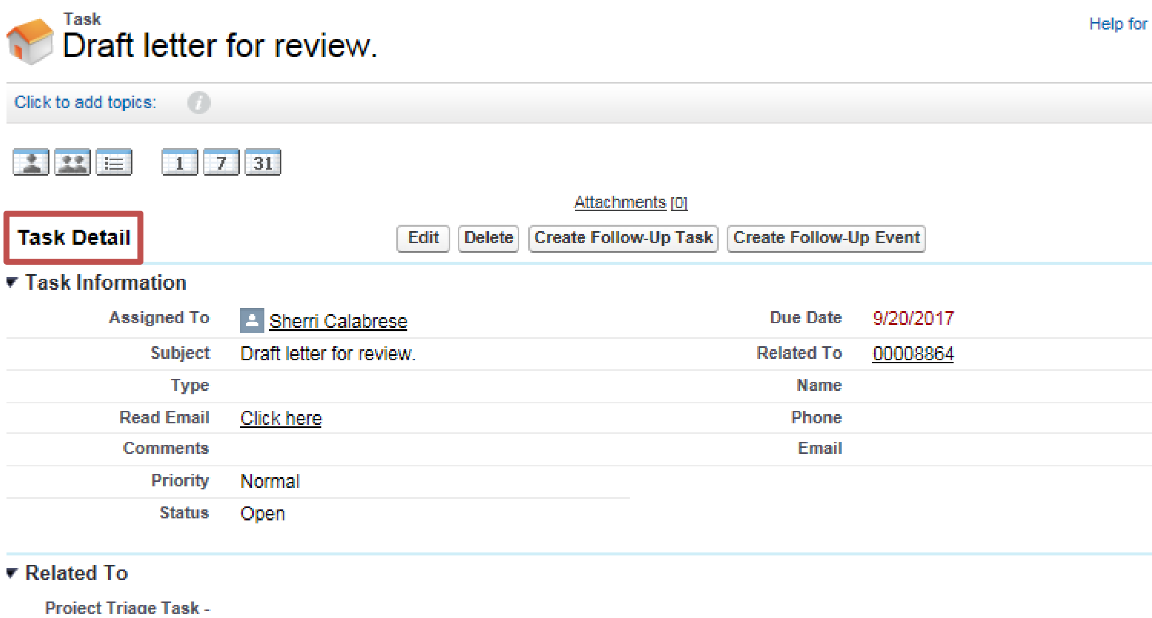
When the task is completed, the user posts an update to the Case Comments (See Section 14: Case Comments) or attaches required documents (See Section 13: Attachments) to the case. The Case Owner receives the update, marks the task as complete if there are no further actions needed, and the task moves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



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



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



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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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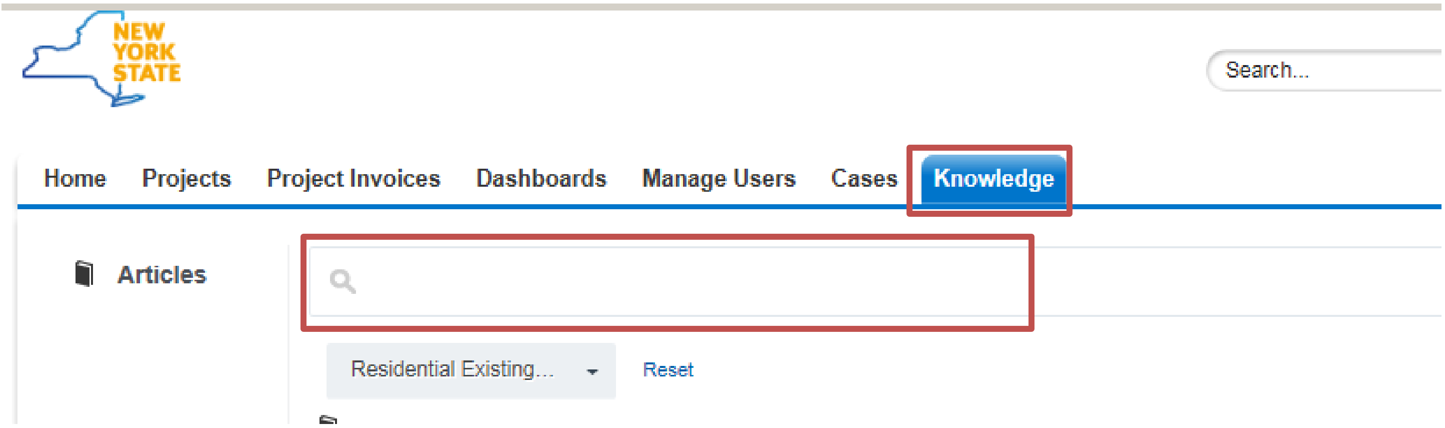
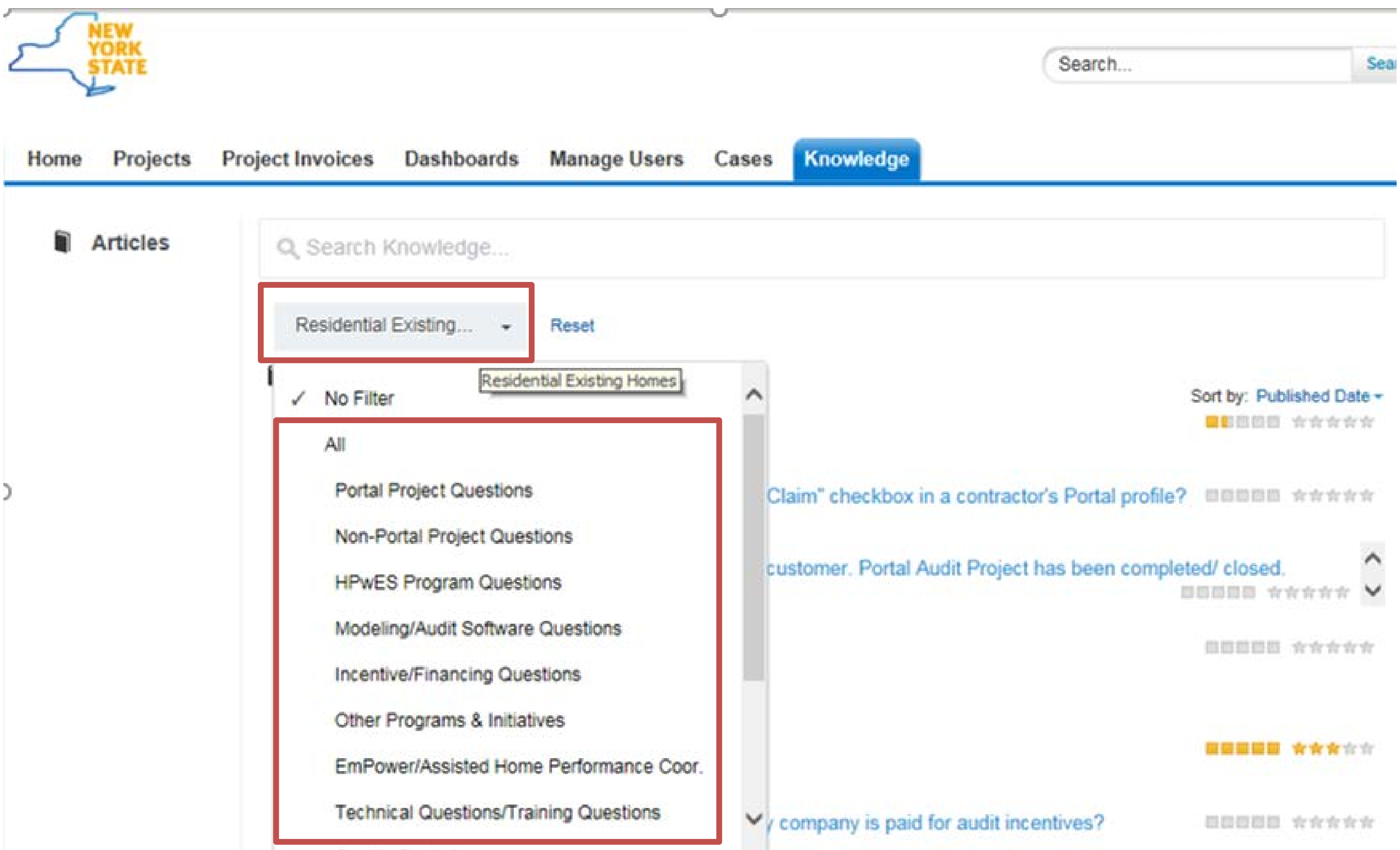
16.1 Searching Articles with the Knowledge Tab

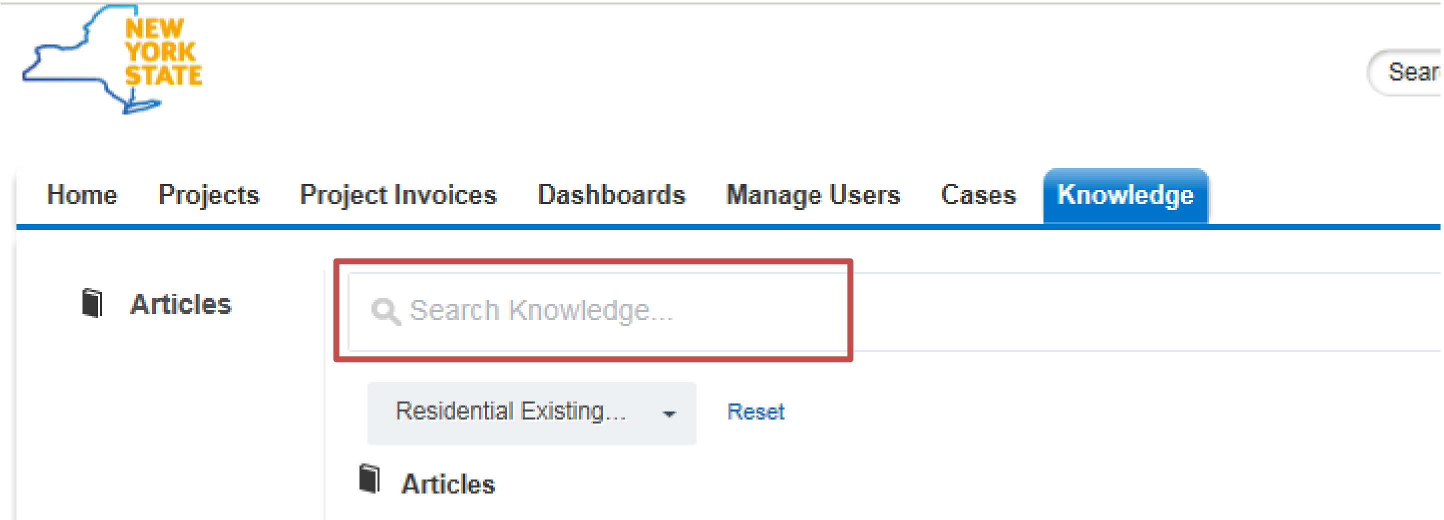
To access the Knowledge articles, click on the Knowledge tab.



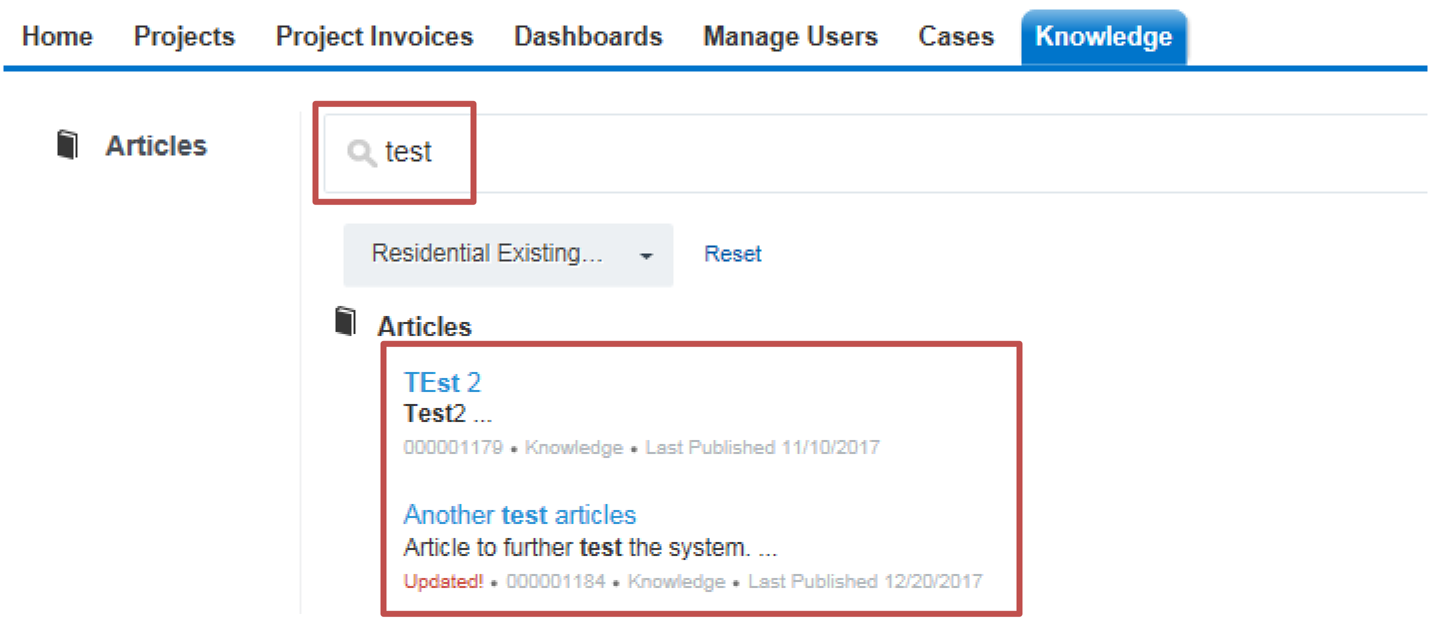
Click on the Residential Existing Homes dropdown box for a menu of topics.



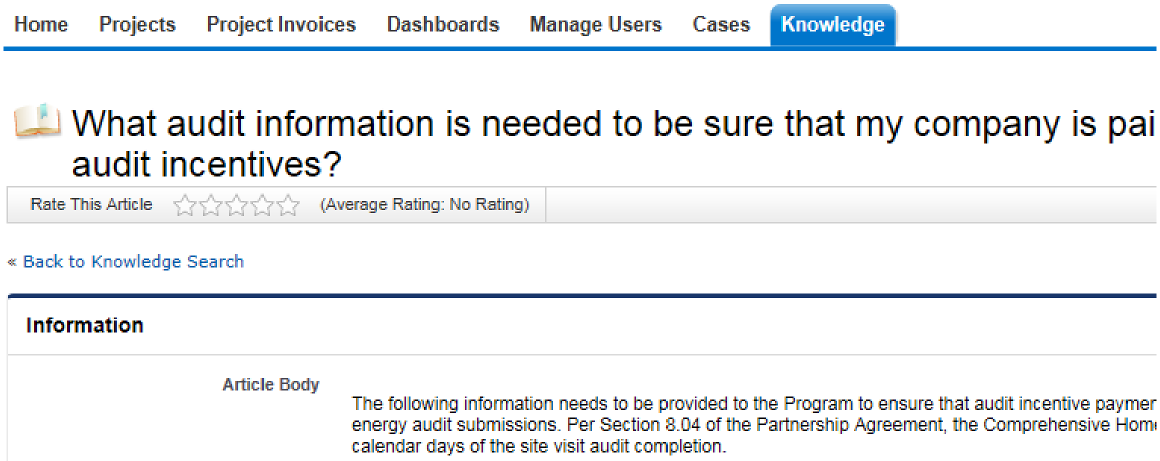
To search for an article, type keywords into the Search box.



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



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



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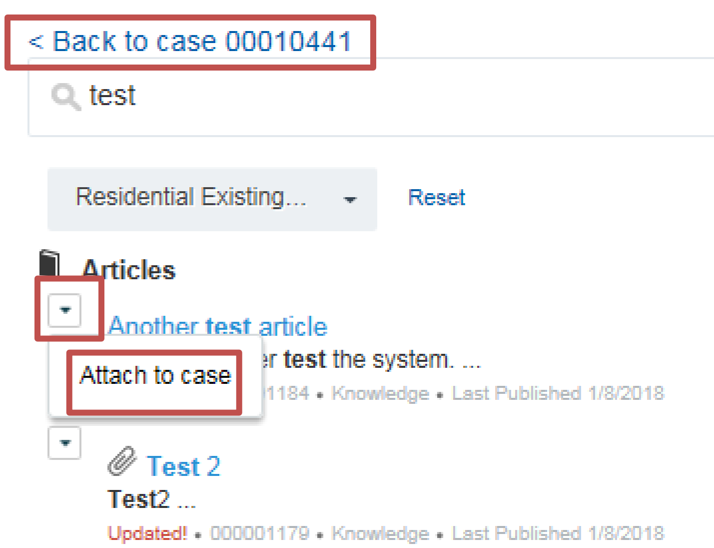
16.2 Searching for and Attaching Articles to Cases

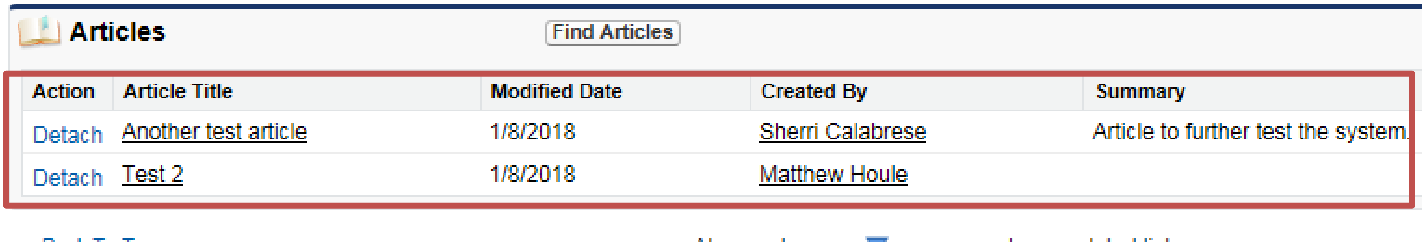
Articles can be searched for within a case, and then attached in the Articles section of the Details tab. To attach an article from the Articles section of the Details tab, click the Find Articles button.

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.



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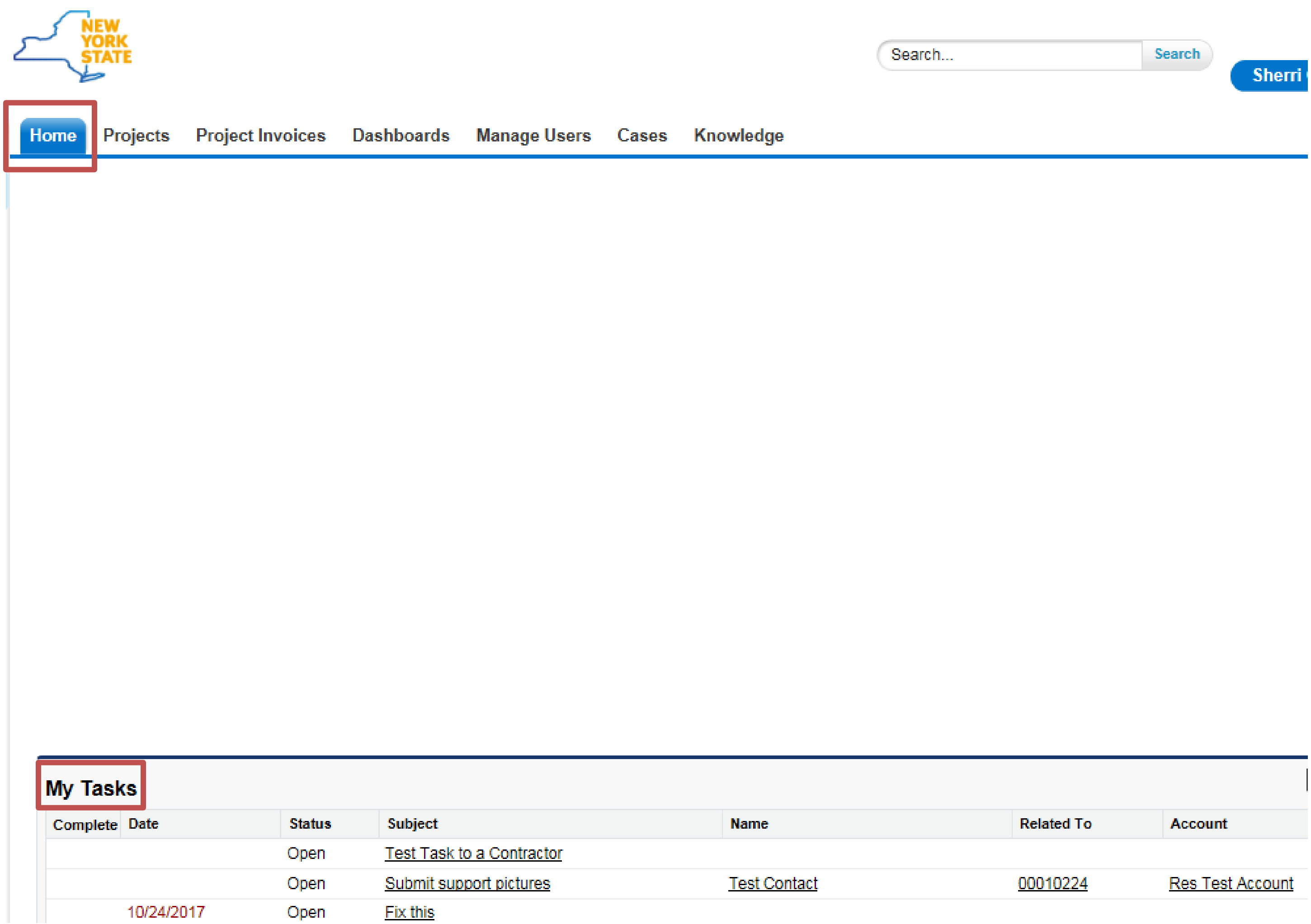
Section 17: Home Tab

The participating contractor's Home page is the first site the user is directed after logging in to the NYSERDA Portal. The My Tasks section is located on that page.



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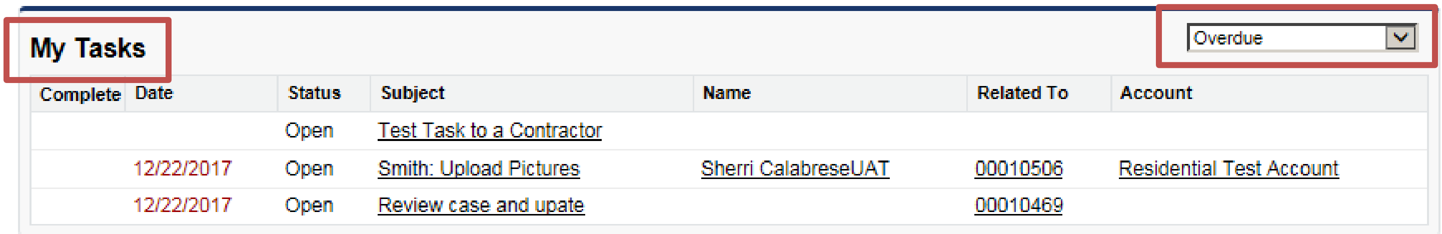
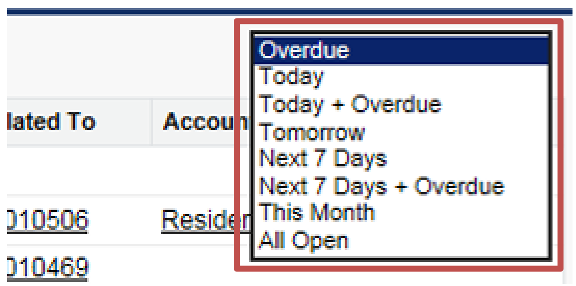
17.1 My Tasks

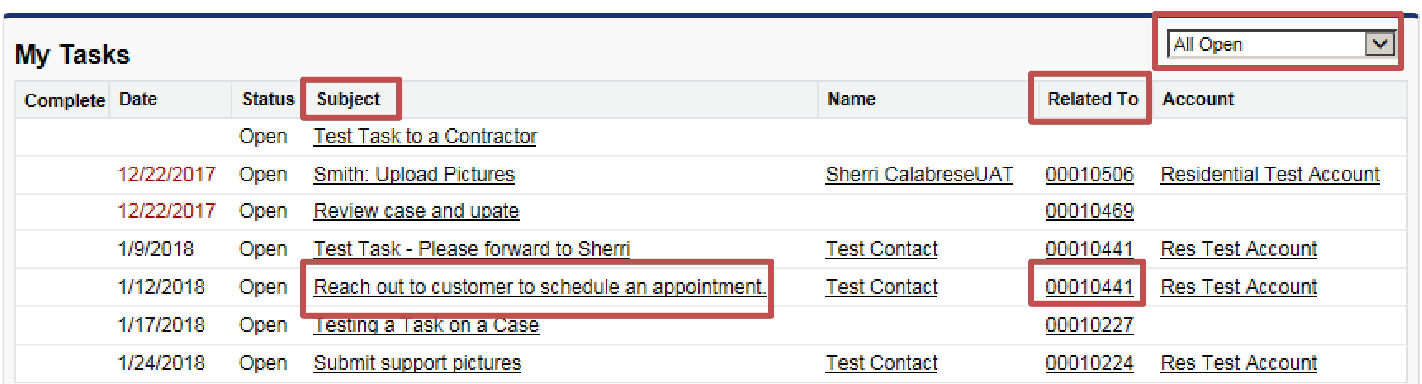
A full list of open tasks assigned to the user can be viewed from the Home page by scrolling down to the My Tasks section. My Tasks default to tasks that are Overdue.



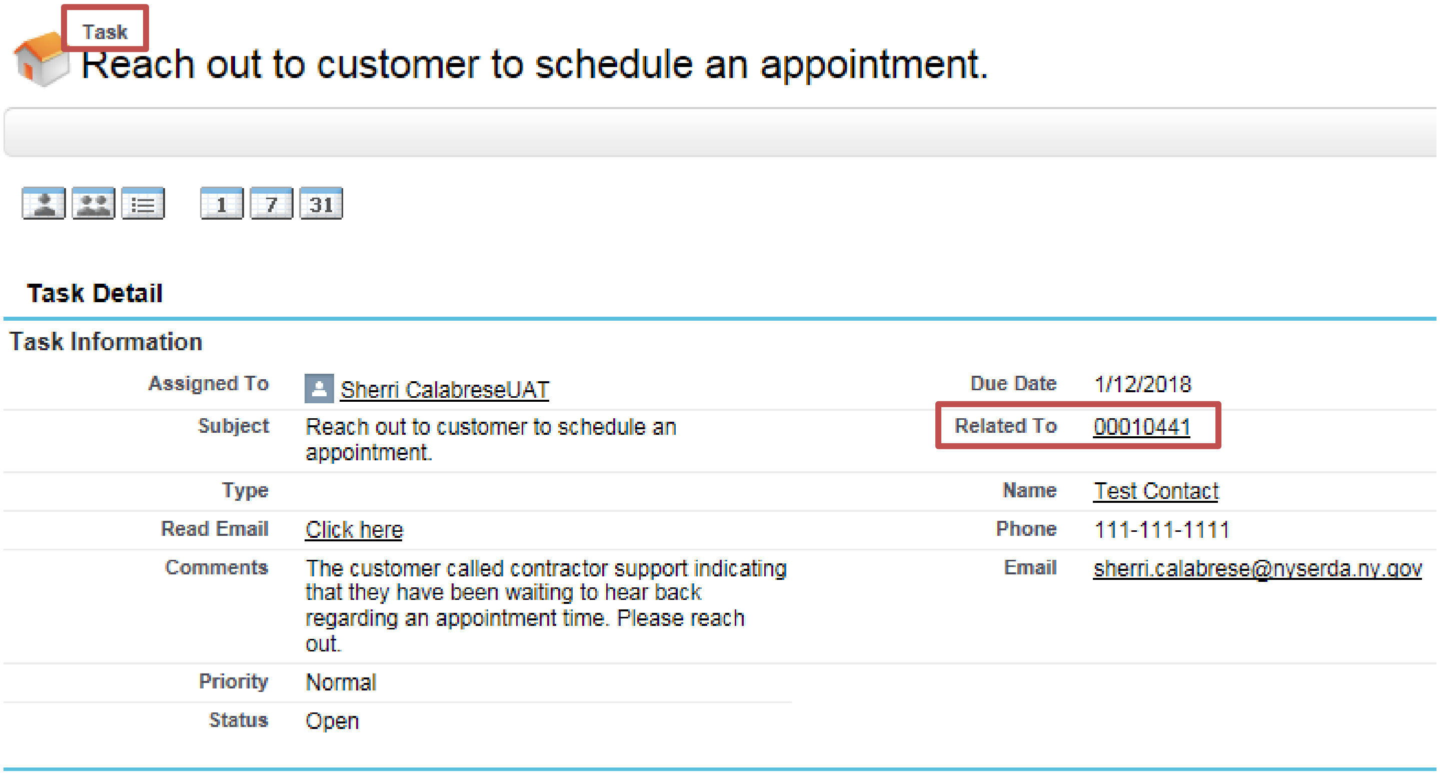
Overdue can be switched to Today, Today + Overdue, Tomorrow, Next 7 Days, Next 7 Days + Overdue, This Month and All Open. Tasks associated with the selected view are then displayed.



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.



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.



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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