

Comfort Home NYHEP Enrollment Training

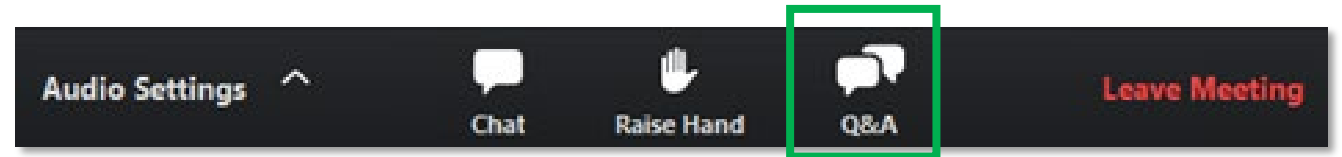
Comfort Home Participating Contractors

Comfort Home Program
April 2025



Questions

1. Click the Q&A icon to ask questions.
2. We will pause to review questions at the end of the presentation.



Comfort Home NYHEP Enrollment Requirements

Today's Webinar Agenda

1. NYHEP Basics: How to Log in, Saving
2. NYHEP Comfort Home Process Overview
3. Creating a Customer Record
4. Creating an Enrollment
5. Assessment Started step: Data Entry
6. Assessment Started step: Documents
7. Assessment Started step: Measures (Packages)
8. Assessment Started step: Creating the Assessment Report
9. How to Make Corrections for Returned Assessments
10. Assessment Approved
11. Install Started step
12. Install Started step: Creating Post-Install Measure Report
13. Upcoming Webinars
14. Questions



NYSERDA

NYHEP Basics

NYHEP=NY Home Energy Portal

- ❖ Web-based Energy Modeling and Workflow management system used for EmPower+, Residential Energy Assessment (REA), and now, Comfort Home Programs.
- ❖ NYHEP users require username and password to access system
- ❖ A company can have multiple NYHEP user accounts set up.
- ❖ To add or remove users, send an email to ComfortHome@nyserda.ny.gov

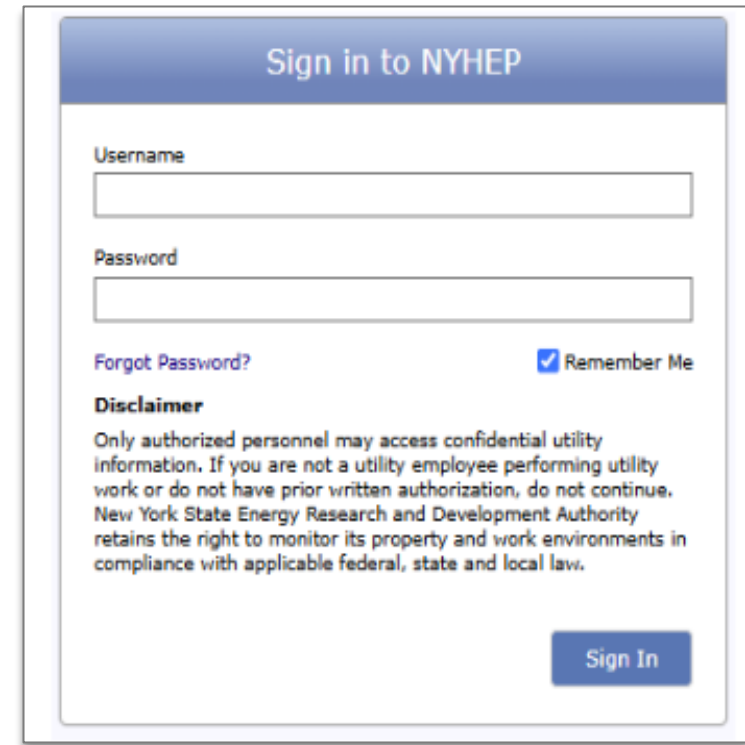
NYHEP Basics: How to Log in

How to access NYHEP for the first time

NYHEP Website:

<https://homeportal.nyserda.ny.gov>

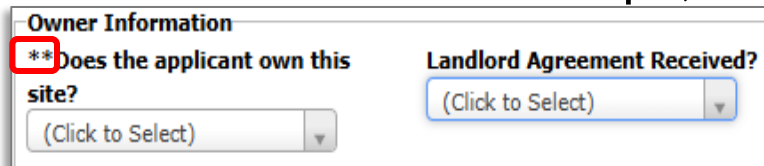
- ❖ If already participating in EmPower+ and/or REA, your current NYHEP credentials will allow access to the Comfort Home workflow also.
- ❖ If you are a new NYHEP User, you will be emailed a link with a temporary password and username. Within the email, follow the link to create a unique password. You will then use the new password and your username to log in to the NYHEP system.



The image shows a screenshot of the 'Sign in to NYHEP' web form. The form has a blue header with the text 'Sign in to NYHEP'. Below the header, there are two input fields: 'Username' and 'Password'. To the right of the 'Password' field, there is a checkbox labeled 'Remember Me' which is checked. Below the input fields, there is a link 'Forgot Password?'. At the bottom of the form, there is a blue button labeled 'Sign In'. A disclaimer is present below the 'Forgot Password?' link, stating: 'Only authorized personnel may access confidential utility information. If you are not a utility employee performing utility work or do not have prior written authorization, do not continue. New York State Energy Research and Development Authority retains the right to monitor its property and work environments in compliance with applicable federal, state and local law.'

NYHEP Basics: Required Fields and Saving

- ❖ Throughout the NYHEP workflow steps, any required fields will be identified with a double asterisk:

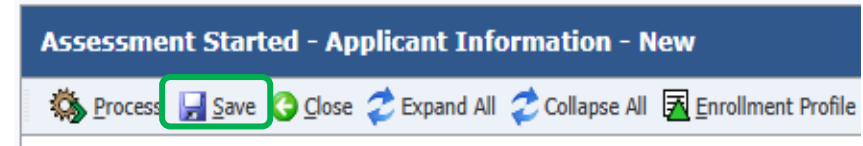


Owner Information

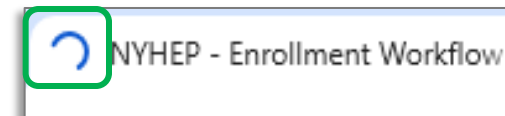
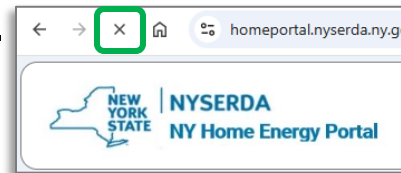
****** Does the applicant own this site? (Click to Select)

Landlord Agreement Received? (Click to Select)

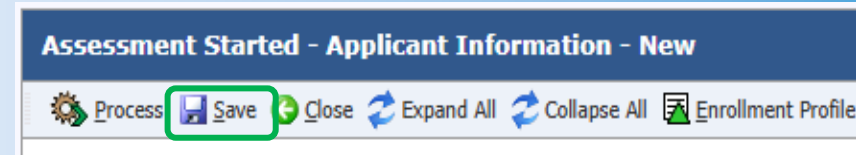
- ❖ Attempting to Process (Submit) a workflow step without all required fields filled in will result in a system generated message with details regarding the missing information.
- ❖ Clicking the **Save** button often while in each Workflow tab is recommended to ensure that you avoid losing any entered data or information.



- ❖ When saving, the reload page browser button will display an **X** and a rotating circular icon at the top-left of the browser will be present.



NYHEP Basics: Saving



- ❖ **DO NOT** click anywhere else on the screen while Saving is taking place. Doing so before a Save is complete will result in a pop-up with two options:



- ❖ **OK**=Data will not be saved and you will continue to the link that was clicked on.
- ❖ **CANCEL**=Stay on the current page and continue saving.

NYHEP Comfort Home Process Overview

Assessment

(Assessment Started workflow step)

- Create customer
- Enroll customer in Comfort Home
- Enter all data
 - Utility accounts, fuels
 - Existing conditions
 - Recommended package(s)
 - Release form uploaded to NYHEP
- Use Package “Install State” of **Recommended**
- Calculate savings
- Submit Assessment for review/approval
- Receive Assessment incentive payment
 - Will use same ACH as prior Comfort Home payments

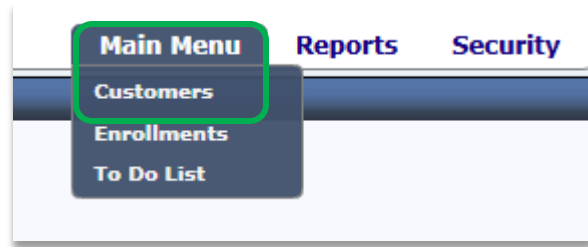
Load Reduction Package Installation

(Install Started workflow step)

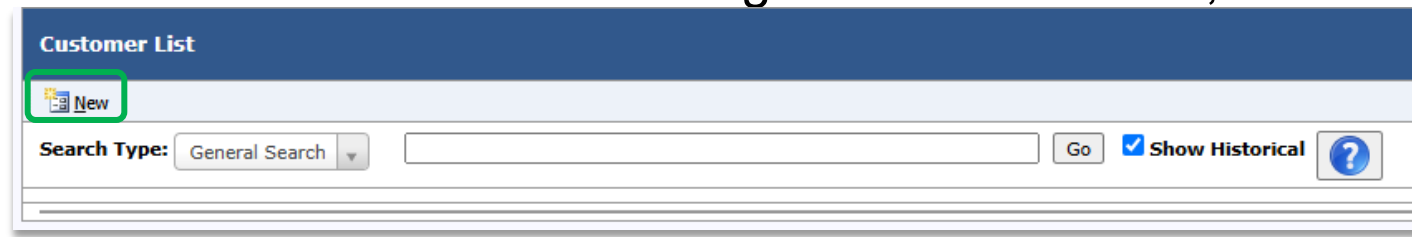
- Search, then open the completed Assessment
- Change Package “Install State” to **Selected**
- Add package(s) details
- Calculate savings
- Submit Installation for review/approval
- Receive Installation incentive payment
 - Will use same ACH as prior Comfort Home payments

Creating a New Customer Record

- ❖ After logging in, navigate to the top right corner Menu bar, click on Main Menu→Customers



- ❖ On the Customer List, type in the customer name in the Search bar. If an Existing Customer record appears, click on the Customer name hyperlink and follow steps to create a new Enrollment. If there is no Existing Customer Record, click New.



Creating a New Customer Record

❖ On the Customer Profile screen, fill in all fields in each section and click Save.

- ☐ Customer Attributes
- ☐ Premise Address
- ☐ Mailing Address
- ☐ Account Details

*NOTE: If the Premise Address and Mailing Address are the same, check the “Mailing Address is the same as the Premise Address” box. When this box is checked, all Mailing Address fields will be hidden.

The screenshot shows the 'Customer Profile' screen. On the left is a 'Customer Summary' sidebar with a list of sections: Customer Profile, Accounts, Premises, Service Points, Usage, Enrollments, Leads, Savings, Contacts, and Notes. The main area is titled 'Customer' and contains several sections. The 'Customer Attributes' section has fields for 'Customer Number', 'Customer Name', and a 'Customer Class' dropdown menu (currently set to 'Residential'). The 'Premise Address' section includes fields for 'Street', 'Unit', 'Street 2', 'Street 3', 'City', 'State', 'Zip', and 'County'. The 'Mailing Address' section has a checkbox labeled 'Mailing Address is the same as Premise Address', which is highlighted with a green box and pointed to by a green arrow from the text block on the left. Below this checkbox are fields for 'Attn', 'PO Box', 'Street', 'Unit', and 'Street 2'. The 'Save' button in the top left of the main area is also highlighted with a green box.

Creating a New Customer Record

- ❖ If Electric Service Provider is RG&E or NYSEG, the Point of Delivery (PoD) # must be entered in the Electric Utility Account # field.
- ❖ The PoD will begin with an R (RG&E) or N (NYSEG). When entering the PoD # in the Electric Utility Account # field, do not enter any letters or leading Zeroes.

Account Details			
Electric Utility Account # <input type="text"/>		Service Provider <input type="text" value="(Click to Select)"/>	Account Status <input type="text" value="Active"/>
Account Class <input type="text" value="Residential"/>		Turn On Date <input type="text" value="04/21/2025"/>	Occupancy Status <input type="text" value="(Click to Select)"/>
Account Name <input type="text"/>			
Last Name <input type="text"/>		First Name <input type="text"/>	
Home Phone <input type="text"/>	Extension <input type="text"/>	Alternate Phone <input type="text"/>	Alt Ext <input type="text"/>
Cell Phone <input type="text"/>		Email <input type="text"/>	

Creating a New Enrollment

- ❖ After the new Customer is saved, navigate to the left menu and click Enrollments and New Enrollments.

The screenshot shows a web application interface for managing customer enrollments. The breadcrumb trail at the top reads: Main Menu >> Customers >> Customer Profile >> Enrollments.

Customer Summary

Customer Name
Comfort Test1

Customer Class
Residential

Left Menu:

- Customer Profile
- Accounts
- Premises
- Service Points
- Usage
- Enrollments** (highlighted with a green box)
- Leads
- Savings
- Contacts
- Notes

Customer - Enrollment List

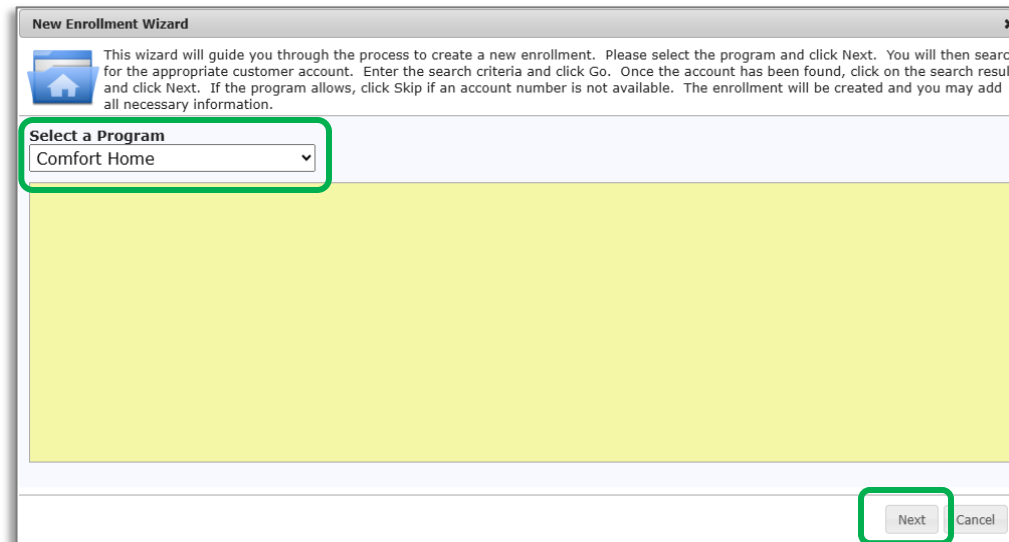
Buttons: Close, New Enrollments (highlighted with a green box)

Program	Status	Enrollment #	App Sig Date	Premise ID	Account #	Address	Installer

No records to display.

Creating a New Enrollment

- ❖ In the New Enrollment Wizard, select Comfort Home from the pulldown list and click Next.



- ❖ A new browser tab will open to continue with the Assessment data entry.

Assessment Started Step: Data Entry

Applicant Information tab

- ❖ The **Applicant Information** tab will open, prepopulated with the information from the Customer record.
 - Today's date will need to be used as the "Application Date" when submitting the assessment. This will ensure that the assessment incentive is correct.

Only mandatory fields need to be filled out on the Applicant Information Tab

Workflow Step Summary

Program
[Comfort Home](#)

Account #: 1001555999

Enrollment #: 1057947
Reference #: 1057947
Status: New

Customer: Comfort Test1
Customer Class: Residential
Premise Id: 999999000051032

Applicant
Test1, Comfort
2 Wall St
Albany, NY 12205
(555) 121-2121

County: Albany
[Driving Directions](#)

Assessment Started - Applicant Information - New

[Process](#) [Save](#) [Close](#) [Expand All](#) [Collapse All](#) [Enrollment Profile](#) [Double Dip Report](#) [Update Customer](#)

Processing Information

Community Hub - Trade Ally
(Click to Select)

Community Hub - Employee
(Click to Select)

Outcome
Work Complete

General Application Information

Application Date
04/21/2025

Reference Number
1057947

Due Date

Project Description

Enrollment Date
04/21/2025

Project Cost
0.00

Weather Region
Capital District

Applicant Information

- Fuel Information
- Existing Conditions
- Partner Information
- Notes (0)
- Documents (0)
- Measures (4)
- Overrides
- Reports (0)
- Application History

When done on this tab, click here to move on to the next tab

Assessment Started Step: Data Entry

Fuel Information

- ❖ Fuel Information tab: Data related to Utility Information, Primary Heating Fuel Type and Account #, and Electrical System.

Assessment Started - Fuel Information - New

Save Close Expand All Collapse All

Utility Information

****Electric Utility Provider**
New York State Electric and Gas

Electric Rate
\$0.18

****Natural Gas Supplier**
None

****Primary Heating Fuel Type**
Propane

Electric Utility POD Number
1001555999

Secondary Heating Fuel Type
(Click to Select)

Delivered Fuel Information

Delivered Fuel
Propane

Delivered Fuel Supplier
ABC Propane

Delivered Fuel Account Number
123987

Electrical System Information

****Existing Electrical Panel Type**
Breakers

****Electrical Panel Box Size (amps)**
200

****Existing Electrical Panel Details-Amps/Open Slots**
200/2

New Electrical Panel Details- Amps/Open Slots

Applicant Information

Fuel Information

Existing Conditions

Partner Information

Notes (0)

Documents (0)

Measures (4)

Overrides

Reports (0)

Application History





- ❖ If the Primary Heating Fuel is a Delivered Fuel (oil, propane, wood etc.), select the corresponding Fuel in the **Delivered Fuel Information** section.

Assessment Started Step: Data Entry

Partner Information

❖ Partner Information Tab: Data related to Assessment and Auditor

Assessment Started - Partner Information - New

 Save  Close  Expand All  Collapse All

Auditor Information

****Assessment Date**

04/01/2025

****Auditor Company Name**

HP Experts

****Auditor Last Name**

Jones

Was Assessment Completed Remotely?

No

****Auditor First Name**

Bob

****Certification Expiration Date**

09/27/2025

Applicant Information

Fuel Information

Existing Conditions

Partner Information

Notes (0)

Documents (0)

Measures (4)

Overrides

Reports (0)

Application History

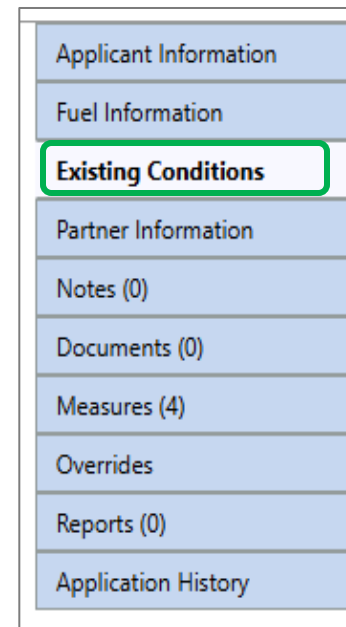
Assessment Started Step: Data Entry

Existing Conditions

❖ Existing Conditions tab: Bulk of data entry. Similar to EmPower+ and REA but some differences.

❖ 10 Sections (SAVE OFTEN):

- ☐ Dwelling Information
- ☐ Shell – Air Infiltration
- ☐ CAZ Testing
- ☐ Shell – Insulation
- ☐ Shell – Windows
- ☐ HVAC – Primary Heating & Cooling
- ☐ Ventilation
- ☐ WH – Water Heating
- ☐ Appliances – Bulbs
- ☐ Appliances – Appliance



A screenshot of a software interface showing a vertical sidebar menu. The menu items are: Applicant Information, Fuel Information, Existing Conditions, Partner Information, Notes (0), Documents (0), Measures (4), Overrides, Reports (0), and Application History. The 'Existing Conditions' item is highlighted with a green rectangular border.

Applicant Information
Fuel Information
Existing Conditions
Partner Information
Notes (0)
Documents (0)
Measures (4)
Overrides
Reports (0)
Application History

Assessment Started Step: Data Entry

Existing Conditions: Dwelling Information

Dwelling Information	
**Dwelling Type	**Number of Units in Building
Single-Family (1 unit)	1
**Estimated Construction Era	**Building Style
1980	Ranch
**Which walls are attached to other units or spaces?	**Stories Above Grade
Garage west wall	1
**Average Story Height (ft)	**Number of Bedrooms
8.0	3
**Total Conditioned Space (sq ft)	**Total Below Grade Square Footage
1000	1000
**Existing Basement Type	**Attached Garage
Warm Unconditioned Basement	True
**Orientation Front of Home	**Wind Exposure
North	Normal: Very heavy shielding, many large obstructions within ...
**Mold or moisture signs inside or outside the home?	**What is the Drainage System Condition?
No	Good

Assessment Started Step: Data Entry

Existing Conditions: Shell – Air Infiltration

No Blower Door Test at Assessment:

Shell - Air Infiltration	
**Pre Work Blower Door Test Complete?	
<input type="text" value="No"/>	
**Pre Work Estimated Air Leakage	Pre Work Blower Door CFM50
<input type="text" value="Leaky"/>	2500
**Post Work Estimated Air Leakage	Post Work Blower Door CFM50
<input type="text" value="Average"/>	1250
Minimum Building Airflow (CFM50)	Mechanical Ventilation Required
1140	No

Blower Door Test done at Assessment:

Shell - Air Infiltration	
**Pre Work Blower Door Test Complete?	
<input type="text" value="Yes"/>	
Pre Work Blower Door CFM50	**Pre Work Blower Door Test In CFM50 - Actual
2800	<input type="text" value="2800"/>
**Post Work Blower Door Test Complete?	
<input type="text" value="Yes"/>	
Post Work Blower Door CFM50	**Post Work Blower Door Test CFM50 - Actual
2200	<input type="text" value="2200"/>
Minimum Building Airflow (CFM50)	Mechanical Ventilation Required
1140	No

- ❖ Comfort Home requires a Blower Test before any shell work is started, but does not require the test during the assessment.
- ❖ If no Blower Door Test, NYHEP will estimate “Pre Work Blower Door CFM50” based on Dwelling Information and the “Pre Work Estimated Air Leakage” selection.
- ❖ Select Estimated Post Work Air Leakage category.
- ❖ If Blower Door Test was completed during Assessment, enter actual CFM50 number and an estimated Post Work CFM50 number.
- ❖ If the Pre or Post Work CFM50 # is below the system calculated Minimum Building Airflow (BAS), “Mechanical Ventilation Required” will change to “Maybe” or “Yes”.

Assessment Started Step: Data Entry

Existing Conditions: CAZ Testing

❖ CAZ Testing: Enter Yes/No for each test.

CAZ Testing	
**Does the Venting Test pass?	**Does the Spillage Test(s) pass?
<input type="text" value="Yes"/>	<input type="text" value="Yes"/>
**Does the Gas Leak Detection Test pass?	**Does the Ambient CO Test pass?
<input type="text" value="Yes"/>	<input type="text" value="Yes"/>
**Does the Undiluted CO Test pass?	
<input type="text" value="Yes"/>	

Assessment Started Step: Data Entry

Existing Conditions: Shell – Insulation

Shell - Insulation

Shell - Insulation	
**Existing Attic Type Unvented Attic	**Attic Hatch or Stair Air Sealed? No
**Attic hatch Insulation R-Value 4	**Location of Existing Attic Insulation Attic Floor
**Attic Floor Area (sq ft) 1000	**Existing Attic Floor R Value 12
**Attic Gable Walls Area (sq. ft.) 400	**Existing Attic Gable Walls R Value 4
**Floor over outside/unheated space No	
**Location Of Existing Foundation Insulation None	
**Basement Wall or Slab Edge R-Value 2	Rim_Band Insulation Level None
**Exterior Above Grade Walls (sq ft w/o windows) 1100	**Exterior Walls - Insulation R-Value 5
**Wall Cavity Depth 2x4	**Type of Wall Insulation None
**Continuous Wall Insulation R-Value 5	

- ❖ **Floor over outside/unheated space**=cantilever, living space over garage, living space over porch.
- ❖ **Exterior above grade walls square footage** does **not** include the window square footage. It's just the solid wall surface area.

Assessment Started Step: Data Entry

Existing Conditions: Shell - Windows

- ❖ Shell-Windows: Data related to existing window and door type and square footage.

Shell - Windows	
**Existing Window Type Single-Pane Plus Storm	
**Area Front Facing ENERGY STAR Windows (sq ft) 0	**Area Back Facing ENERGY STAR Windows (sq ft) 0
**Area Left Facing ENERGY STAR Windows (sq ft) 0	**Area Right Facing ENERGY STAR Windows (sq ft) 0
**Area Front Facing Non-ENERGY STAR Windows (sq ft) 25	**Area Back Facing Non-ENERGY STAR Windows (sq ft) 25
**Area Left Facing Non-ENERGY STAR Windows (sq ft) 25	**Area Right Facing Non-ENERGY STAR Windows (sq ft) 25
**Area Existing Skylights - Enter 0 if none (sq ft) 0	
**Total Area of Exterior Doors (sq ft) 20	**Dominant Type of Exterior Door Wood or Metal Door With Storm
Front Window Orientation North	**Total Count of Windows & Skylights 10
**Window has Exterior Solar Screen No	

Assessment Started Step: Data Entry

Existing Conditions: HVAC – Primary Heating & Cooling, Ventilation, WH – Water Heating

- ❖ HVAC – Primary Heating & Cooling, Ventilation, WH – Water Heating: Data related to the heating, cooling, water heating and ventilation systems in the home.

HVAC - Primary Heating & Cooling		
**Heating System Primary		**Primary Heating System Install Year
Central Furnace		2000 - 2010
**Primary Cooling System		**Primary Cooling System Install Year
Central Air Conditioner		2000 - 2010
**Predominant Location of Duct Systems		**Insulation State of Duct System
Basement		No Duct Insulation
**Estimated Duct Leakage		**Thermostat Schedule
Average Sealed		Htg Setbacks each evening only

Ventilation		
**Is there a Whole-House Ventilation System?	**Ventilation System Type	**Ventilation System Rated Flow Rate (CFM)
Yes	ERV	100

WH- Water Heating	
**Hot Water Fuel Type	**Water Heater System (Existing)
Electric	Storage
**Water Heater Location	**DWH System Installation Year
Unconditioned Space	2010 or Newer
**Low Flow Hot Water Fixtures	**Water Heater Storage Capacity (Gallons)
True	40
**Water Heater Efficiency (UEF)	
0.90	

Assessment Started Step: Data Entry

Existing Conditions: Appliances – Lighting, Appliances - Appliance

- ❖ Appliances- Bulbs, Appliance: Data related to Bulb types and major appliances in the home.





Appliances - Bulbs		
% of Incandescent	% of CFL	% of LED
<input type="text" value="20"/> %	<input type="text" value="30"/> %	<input type="text" value="50"/> %

Appliances - Appliance	
**Primary Refrigerator - Approximate Model Year <input type="text" value="2011-Present"/>	**Primary Refrigerator - Configuration <input type="text" value="Top Freezer"/>
**Primary Refrigerator - Existing Volume <input type="text" value="20.0"/>	**Is the Primary Refrigerator ENERGY STAR/CEE Rated? <input type="text" value="Yes"/>
Dehumidifier Type <input type="text" value="Stand Alone"/>	**Dehumidifier Size <input type="text" value="40"/>
Dehumidifier Unit of Measure Pints/Day	Is the Dehumidifier ENERGY STAR/CEE Rated? <input type="text" value="Yes"/>
**Clothes Washer Type <input type="text" value="Top Load"/>	**Clothes Dryer Type <input type="text" value="Electric Resistance"/>
**Stovetop/Oven/Range Type <input type="text" value="Slide-in range/stove"/>	**Stovetop/Oven/Range Fuel Type <input type="text" value="Natural Gas"/>

Assessment Started Step: Documents

Assessment Started Workflow Step - Documents

New Close

	Required?	Document Type(s)	Document Name	Source	File Size	Comments	Create Date	Created By
	!	Customer Release Form						
		Multi Unit Photo						
		Other attachments						
		Owner Permission Form (OPF)						

Applicant Information

Fuel Information

Existing Conditions

Partner Information

Notes (0)

Documents (0)

Measures (5)

Document

Name
{New}

Upload a New Document

Browse

Type
Customer Release Form

Comments

Save Delete Close

- ❖ Go to the **Documents** tab page.
- ❖ Required documents will be indicated with a red exclamation mark.
- ❖ Click the **New** icon, then click the **Browse** button in the pop-up to select the file you wish to upload.
- ❖ Optional: The Comments section can be used to leave a Note for Program regarding the document.

Required?	Document Type(s)	Document Name	Source	File Size	Comments
	Customer Release Form	Customer Release Form.docx	Assessment Started	12.94 KB	Completed Customer Release form

Assessment Started Step: Measures (Packages)

- ❖ The Measures tab will pre-load all 3 Package options plus an Assessment Fee measure. Click on the V next to a Package to expand it (click on the Double V in the light blue banner to expand [or collapse] all).
- ❖ DO NOT click the red X next to any Packages.

Assessment Started - Measures - New

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

Enrollment Measures

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

Applicant Information

Fuel Information

Existing Conditions

Partner Information

Notes (0)

Documents (0)

Measures (4)

Overrides

Reports (0)

Application History

Created by Smith, Steven on 4/21/2025 4:02:20 PM

Updated by Smith, Steven on 4/22/2025 2:17:10 PM

Assessment Started Step: Measures (Packages)

- ❖ Each **Package** will default to an **Installed State** of “Not Completed”, meaning the Package is not being recommended or installed.
- ❖ If the Existing Insulation and Air Infiltration levels entered in Existing Conditions need improvement, the **Existing Conditions Meet Pkg** field will say NO. If Existing Insulation and Air Infiltration levels already meet Program standards, that field will say YES and you will be unable to select that Package.
- ❖ Select the appropriate Installed State based on the work being proposed:
 - ☐ “Selected”=This package will be installed
 - ☐ “Recommended”=This package has been recommended, but may not be installed.

1	^	×	Package A - Attic & Air Sealing (PACK_A)	Per Home	1		\$0.00	\$0.00	\$0.00
Existing Conditions Meet Pkg A:				No					
**Installed State of Package A:				<div>Not Completed (Click to Select) Not Completed Selected Recommended</div>					

Assessment Started Step: Measures (Packages)

Existing Conditions Meet Pkg A:	No
**Installed State of Package A:	<input type="text" value="Recommended"/>
**Mechanical Ventilation Installed:	<input type="text" value="No"/>
Improved Blower Door CFM50_Pkg A:	2000
Existing Attic Type:	Vented Attic
Existing Location Attic Insulation:	Attic Floor
**Location of Improved Attic Insulation:	<input type="text" value="Attic Floor"/>
**Attic Thermal Boundary Change?:	<input type="text" value="No"/>
Primary Attic Improvement Type:	Insulate Attic Floor
Existing Attic Floor Area (sq. ft.):	1000
Existing Attic Floor R Value:	
**Area of Attic Floors Meets Requirements:	<input type="text" value="0"/>
**Attic Floor Improved Insulation R-Value:	<input type="text" value="45"/>
**Area of Attic Floors Will Not Meet Requirements:	<input type="text" value="0"/>

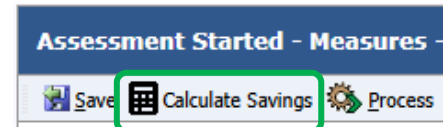
- ❖ If **Selected** or **Recommended** are chosen, complete all required fields.
- ❖ **"Area of Attic Floors Meets Requirements"** refers to any part of the attic that is already insulated to Program standards.
- ❖ Materials and Labor costs for each measure must also be entered.
- ❖ **SAVE OFTEN**

**Insulation Labor Cost:	<input type="text" value="\$500.00"/>
**Insulation Material Cost:	<input type="text" value="\$2,000.00"/>
**Air Sealing Labor Cost:	<input type="text" value="\$300.00"/>
**Air Sealing Material Cost:	<input type="text" value="\$200.00"/>

Assessment Started Step: Measures (Packages)

❖ If Package B or C are being Proposed, complete all required fields on each Package.

❖ Click **Save**



❖ Once all Packages are filled in, click the **Calculate Savings** button at the top of the screen. The building modeling and package savings calculation will take about two minutes to complete. After Calculations are complete, refresh the screen.

❖ In the **Contractors Assessment Fee** measure, indicate whether the Assessment was already completed and paid in Compass. If the Assessment was not paid in Compass, the \$200 Assessment fee will populate:

4	^	✖	Contractors Assessment Fee (CH_FEE)	Each	1			\$200.00	\$200.00
---	---	---	-------------------------------------	------	---	--	--	----------	----------

****Was an assessment for this home submitted and paid in Compass?:**

Yes

No

Measure Cost	Incentive
\$3,000.00	\$2,700.00

❖ To View the total Workscope Cost and Incentives, collapse the Measures.

Enrollment Measures															
#			Measure Name	Measure			Measure Cost		Incentive		Savings				
				Unit	P Qty	I Qty	Unit Price	Amount	Unit Price	Amount	kWh	Therms	MMBTu		
1	▼	✖	Package A - Attic & Air Sealing (PACK_A)	Per Home	1		\$3,000.00	\$3,000.00	\$2,500.00	\$2,500.00	0.0000	0.0000	0.0000	📁	📄
2	▼	✖	Package B - Walls & Floors (PACK_B)	Per Home	1		\$0.00	\$0.00	\$0.00	\$0.00	0.0000	0.0000	0.0000	📁	📄
3	▼	✖	Package C - Windows (PACK_C)	Per Home	1		\$0.00	\$0.00	\$0.00	\$0.00	0.0000	0.0000	0.0000	📁	📄
4	▼	✖	Contractors Assessment Fee (CH_FEE)	Each		1			\$200.00	\$200.00				📁	📄
							Measure Cost		Incentive		kWh	Therms	MMBTu		
Grand Total							\$3,000.00		\$2,700.00		0.0000	0.0000	0.0000		

Assessment Started Step: Creating the Assessment Report

- ❖ After all data is entered and any Packages are selected, the Contractor must create the **Assessment Report** to provide to the customer.
- ❖ From the Assessment Started step, click on **Reports** on the right-hand side. Click the **Generate Report** button, select **Comfort Home Assessment Report** from the pull-down, and click OK.
- ❖ A “**Generating...**” window will appear before the downloadable PDF is created.

Workflow Step - Reports

Close Generate Report

Name	Create Date	Created By
No records to display.		

Workflow Step Detail

- Fuel Information
- Existing Conditions
- Partner Information
- Notes (1)

Generate Report

Report

(Click to Select)

(Click to Select)

Comfort Home Assessment Report

Comfort Home Proforma Report

OK Cancel

Workflow Step Detail

- Fuel Information
- Existing Conditions
- Partner Information
- Notes (1)
- Contact Attempts (0)
- Documents (1)
- Overrides
- Reports (0)**
- Workflow Step History

Close Generate Report

Name	Create Date	Created By
Comfort Home Assessment Report-1057947_20250423_0941.pdf	4/23/2025	Smith, Steven

Home Energy Assessment

NEW YORK STATE NYSEDA

Congratulations on taking an important first step! An energy assessment through NYSEDA's Comfort Home Program can help improve your home's energy usage.

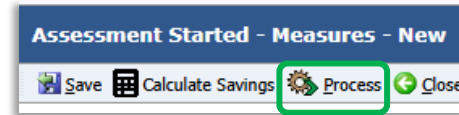
CLEARresult has completed a thorough energy assessment at the home of Comfort Test1, located at 2 Wall St, Albany, NY 12205. The energy assessment report will help you understand your energy usage. This report lists recommendations to help you save money on your energy bills, improve energy efficiency, and make your home safer and more comfortable. The energy assessment report will also help you understand which parts of your home are working well already.

Summary of Your Home's Current Energy Assessment

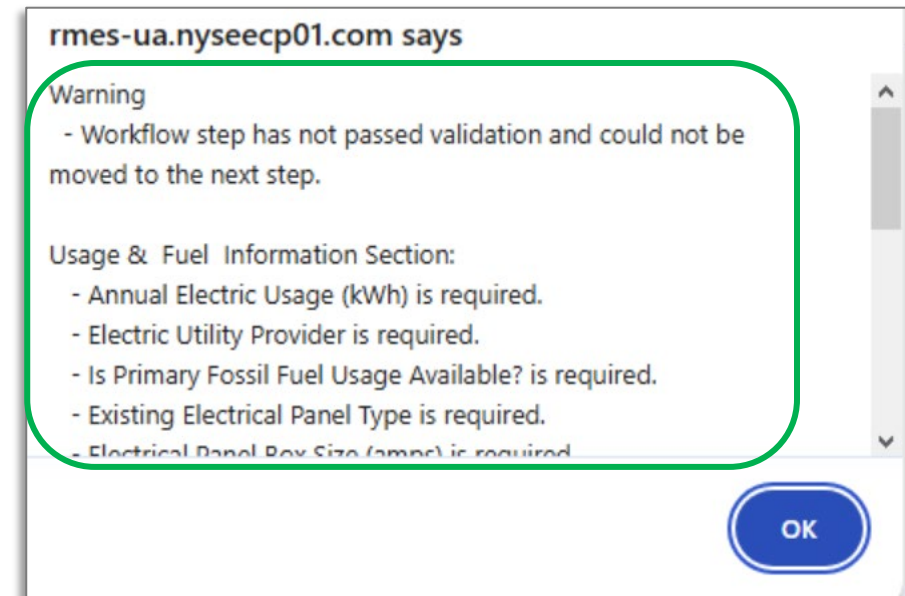
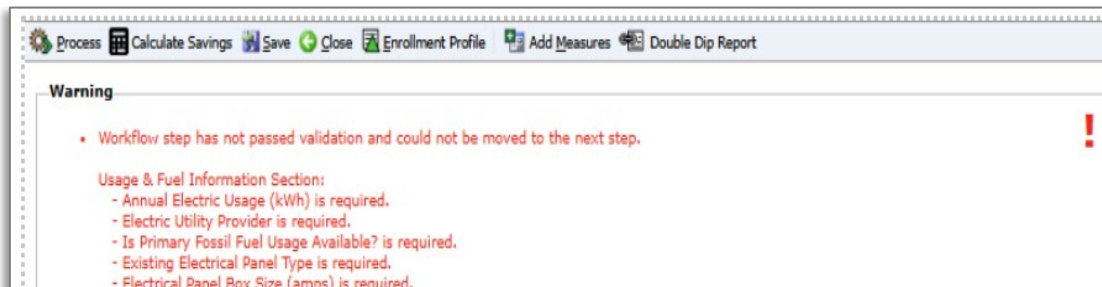
Category	Needs Improvement	Fair	Good
Building Envelope (Page 2)	✓		
Heating and Cooling (Page 3)	✓		
Water Heating (Page 4)	✓		
Appliances and Lighting (Page 5)	✓		

Assessment Started Step: Submitting

- ❖ Once all Measures are filled in and Savings have been calculated, click the **Process** button at the top of the screen to submit your assessment for Program Review.



- ❖ The system will automatically scan for missing or omitted data and will stop processing and display error messages identifying any issues.
- ❖ To view the errors again, click on the red exclamation at top of screen.
- ❖ Fill in the missing data, click **Save**, and click **Process** again.



Successful Submission

- ❖ The project has been submitted successfully when clicking the Process button returns no warning messages and advances to the **Assessment Review** step.

Enrollment Profile - Workflow						
View Lead Add Workflow Cancel Enrollment Close Double Dip Report						
Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date	Total # Days	
Enrollment						
Assessment Started	NYSERDA	Closed - Work Completed	3/19/2025	4/28/2025	40	WO
Pre-Engineering						
Assessment Review	TRC Companies	Open - Unscheduled / Awaiting Results	4/28/2025			WO

How to make corrections for returned Assessments

- ❖ Reviewers will return an Assessment Submission if there are any corrections that need to be made. Contractor will receive an email notification if a project has been returned. The notes in the email will have the reason(s) and the Enrollment ID listed.

Hello TRC Companies,

The following Comfort Home assessment has been returned.

NYHEP user guide

1057521

- Inconsistent Data Submitted

Please review the notes in NYHEP, make the required updates, then Save, Calculate Savings, then process to submit again for review.

Thank you,

Your Comfort Home Pilot Team

ComfortHome@nyserda.ny.gov

(888) 406-4009

How to make corrections for returned Assessments

- ❖ To view the specific Notes describing what needs to be addressed enter the **Enrollment ID** into the Global Enrollment Search bar and hit Enter, or locate the returned enrollment using your **To Do List**.

Global Enrollment Search

1057947

Main Menu

Customers

Enrollments

To Do List

- ❖ Reopen the **Assessment Started** step and Click on Notes.

Enrollment Profile - Workflow						
View Lead Add Workflow Cancel Enrollment Close Double Dip Report						
Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date	Total # Days	
Enrollment						
Assessment Started	Test Contractor	Open - New	10/28/2024	10/29/2024	1	WO
Pre-Engineering						
Assessment Review		Cancelled - Cancelled	10/29/2024	10/29/2024	1	
Enrollment						
Assessment Started		Open - New	10/29/2024			

Assessment Started Workflow Step - Notes						
New Note Close						
Date	Origin	Created By	Notes	Interaction?	Interaction Type	Interaction Reason
4/22/2025	Assessment S...	Smith, Steven	Please address the following and re...	No		
Applicant Information						
Fuel Information						
Existing Conditions						
Partner Information						
Notes (1)						

Save Delete Close

Origin: Assessment Started

Note Date: 04/22/2025

Note Time: 5:37 PM

Notes

Please address the following and resubmit:

- Proposed square footage of rim joist insulation is not consistent with what was entered in Existing Conditions.
- Customer Release Form is not signed.

Who can view this note?

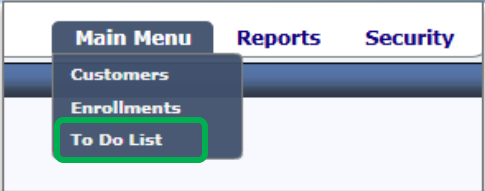
☒ Users with access to this enrollment

☐ Users with access to this workflow step

How to make corrections for returned Assessments

Utilizing the *To Do List*

- ❖ To confirm the status of an enrollment, you can utilize the **To Do List**.
- ❖ Use Filters to select Workflow Step (add additional filters as desired)
- ❖ A list of all Enrollments meeting the filter criteria will appear.



To Do List

Print Selected Work Orders Bulk Reassign Export Save Search

Click to Hide Search Details...

Account Number	Customer Name	City	Created Date From	Due Date From
Enrollment Number	Applicant First Name	Zip	To	To
Reference Number	Applicant Last Name	County		
Invoice / Payment Request Number		Phone		

Program: Comfort Home

Trade Ally: Test Contractor

Employee: All

Workflow Step: All

Assessment Started

Install Started

To Do List

Print Selected Work Orders Bulk Reassign Export Save Search

Show Search Details...

	Enroll. #	Ref. #	Invoice / PR #	Program	Enrollment Status	Customer Name	Applicant Name	Applicant Address	ZIP	County	Service Provider	Workflow Step	Project Type	Approved Income Tier	Referral Source	Created Date	Initial Process Date
<input type="checkbox"/>	1057408	1057408		Comfort Home	Open				10023	New York	Central Hudson Gas and Electric	Assessment Started New Test Contractor				10/8/2024	11/26/2024

Assessment Approved → Install Started step

- ❖ Once the assessment has been approved, the contractor will receive an email notification from the system displaying the approved Package(s), eligible incentives and Enrollment ID.
- ❖ The approved packages are now eligible for funding after installation. (Note: The Assessment Fee will be processed for payment automatically via an **Assessment Funding Allocations** step)

Hello TRC Companies,

The following Comfort Home assessment has been approved.

NYHEP user guide

1057521

- Assessment Approved - \$200 Released
- Eligible for \$1600 Package A Incentive
- Eligible for \$3000 Package B Incentive
- Eligible for \$4000 Package C Incentive
-

Once you have installed the standard package, submit a Load Reduction Install through NYHEP. [Check the Comfort Home Quick Start Guide for assistance or contact us.](#)

Thank you,

Your Comfort Home Pilot Team

ComfortHome@nyserda.ny.gov

(888) 406-4009

Install Started step

- ❖ When the customer has signed the contract and the work has been completed, the Contractor will enter what was installed in the **Install Started** step.
- ❖ To locate the enrollment enter the Enrollment ID into the **Global Enrollment Search** bar and hit Enter OR search for the **Customer Name** via Main Menu → Customers or locate the enrollment using your **To Do List**.
- ❖ Click on the **Install Started** hyperlink.
- ❖ Click on the Documents section on the right-hand side and click New to Upload the completed Load Reduction Contract.

Enrollment			
Install Started	NYSERDA	Open - Unscheduled / Awaiting Results	2/18/2025

Install Started Workflow Step - Documents

New

Close

Required?	Document Type(s)	Document Name	File Size	Comments	Create Date	Created By
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
!	Load Reduction Contract					
	Building Owner Permission Form					
	Heat Pump Contract					
	Other attachments					

Workflow Step Detail

Notes (1)

Contact Attempts (0)

Documents (0)

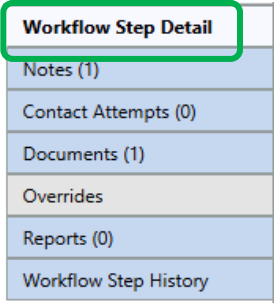
Overrides

Reports (0)

Workflow Step History


Install Started step

❖ Click on the **Workflow Step Detail** tab to open the **Install Started** window.



A vertical menu with the following items: Workflow Step Detail (highlighted with a green box), Notes (1), Contact Attempts (0), Documents (1), Overrides, Reports (0), and Workflow Step History.

❖ In the **Visit Information** section, click on the “Assign To” and select your company.



The Visit Information form contains the following fields and controls:

- Due Date**: A date input field.
- Scheduled Date**: A date input field.
- Actual Visit Date**: A date input field with the value 10/30/2024.
- Drive Mileage**: A numeric input field with the value 0 and a unit of miles.
- Start Time**: A time input field.
- Time In**: A time input field.
- Duration**: A numeric input field with a unit of hours.
- Time Out**: A time input field.
- Drive Time**: A numeric input field with the value 0.00 and a unit of hours.
- Assign To**: A dropdown menu with the value Test Contractor (highlighted with a green box).
- Employee**: A dropdown menu with the value Cho, Hannah (highlighted with a green box).
- Outcome**: Radio buttons for Work Complete (selected) and On Hold.

Install Started step

- ❖ Complete all required fields in the **Workflow Information** and **Air Leakage** sections.

Workflow Information		
Installation Date 04/30/2025	**Financing - Green Jobs Green New York No	Heat Pump Eligible Yes
Project Level Good	Savings - kWh 11503.03675	Savings - Therms 754.06
Savings - MMBTu 75.406		

Air Leakage	
**Pre Work Blower Door Test Complete? Yes	**Pre Work Blower Door Test In CFM50 - Actual 2800
Pre Work Blower Door CFM50 2800	
**Post Work Blower Door Test Complete? Yes	**Post Work Blower Door Test CFM50 - Actual 2300
Post Work Blower Door CFM50 2300	
Minimum Building Airflow (CFM50) 1140	Mechanical Ventilation Required No

Install Started step

- ❖ In the **Measures** section, change **Installed State of Package** to “**Selected**” (if not already done at Assessment Submission). If there were any changes made in the scope or the recommendations of the packages, those changes will need to be reflected. You can do so by clicking into the package and change any selections.

Measures

#	▲	Measure Name	Measure		Measure Cost		Incentive		Savings			
			Unit	P Qty	I Qty	Unit Price	Amount	Unit Price	Amount	kWh	Therms	MMBTu
1	^	Package A - Attic & Air Sealing (PACK_A)	Per Home	1	1	\$3,000.00	\$3,000.00	\$1,600.00	\$1,600.00	0.0000	0.0000	0.0000

Existing Conditions Meet Pkg A:

No

**Install Date:

04/30/2025

**Installed State of Package A:

Selected

**Mechanical Ventilation Installed:

No

Improved Blower Door CFM50_Pkg A:

2200

Existing Attic Type:

Unvented Attic

Existing Location Attic Insulation:

Attic Floor

**Location of Improved Attic Insulation:

Attic Floor

**Insulation ENERGY STAR Certified:

Yes

**Attic Thermal Boundary Change?:

No

Primary Attic Improvement Type:

Insulate Attic Floor

Existing Attic Floor Area (sq. ft.):

1000

Existing Attic Floor R Value:

**Area of Attic Floors Meets Requirements:

0

**Attic Floor Improved Insulation R-Value:

45

**Area of Attic Floors Will Not Meet Requirements:

0

**Rim Joist Improved R-Value:

14

- ❖ You will need to **Save** any changes, **Calculate Savings** again, **Save** again, and click **Process**.
- ❖ The Enrollment will advance to **Installation Funding Allocations** for final review and payment.

Install Started step: Creating the Post-Install Measure Report

- ❖ After all data is entered and any Package updates are made on the Install Started step, the Contractor must create the **Post-Install Measure Report** which must be signed by the customer and contractor.
- ❖ From the Install Started step, click on **Reports** on the right-hand side. Click the **Generate Report** button, select **Post-Install Measure Report** from the pull-down, and click OK.
- ❖ A “**Generating...**” window will appear before the downloadable PDF is created.

Workflow Step - Reports

Close

Generate Report

Name	Create Date	Created By
No records to display.		

Generate Report

Report

(Click to Select)

(Click to Select)

Post-Install Measure Report

Comfort Home Assessment Report

Comfort Home Proforma Report

OK

Cancel

Workflow Step Detail

Notes (1)

Contact Attempts (0)

Documents (1)

Overrides

Workflow Step Detail

Notes (1)

Contact Attempts (0)

Documents (1)

Overrides

Reports (1)

Workflow Step History

CloseGenerate Report		
Name	Create Date	Created By
Post-Install Measure Report-1057947_20250428_1157.pdf	4/28/2025	Smith, Steven

Customer in Compass and NYHEP

Scenario: Customer Assessment completed in Compass. Now installation has taken place and the installation needs to be entered for incentive payment.

- During May: Use Compass to enter the installation just like you have been doing.
- After May: Use the NYHEP workflow:


1. Search for customer in NYHEP, enroll in Comfort Home
2. Enter existing conditions
3. On the Measures tab, under the Contractor Assessment Fee measure, select "Yes".
This will zero out the Assessment Incentive in NYHEP
4. Save
5. Calculate Savings
6. Click Process to submit the assessment for review.
7. Once the assessment is approved, start the Installation work

5	^	X	Contractors Assessment Fee (CH_FEE)	Each		1			\$0.00
			**Was an assessment for this home submitted and paid in Compass?:	Yes					

Upcoming Webinars


- ❖ This webinar is scheduled to be presented on the following dates and times:
 - May 1: 2:00-3:00 PM : [Comfort Home NYHEP Introduction and Training Session \(5/01\)](#)
 - May 6: 10:00-11:00 AM : [Comfort Home NYHEP Introduction and Training Session \(5/06\)](#)
 - May 8: 2:00-3:00 PM : [Comfort Home NYHEP Introduction and Training Session \(5/08\)](#)
- ❖ To sign-up, go to [Contractor Support - Upcoming Events](#) and click on the date you would like to attend


[Comfort Home NYHEP Introduction and Training Session \(05/01\)](#)

 May 1, 2025


 2:00 pm - 3:00 pm


[Comfort Home NYHEP Introduction and Training Session \(05/08\)](#)

 May 8, 2025

 2:00 pm - 3:00 pm

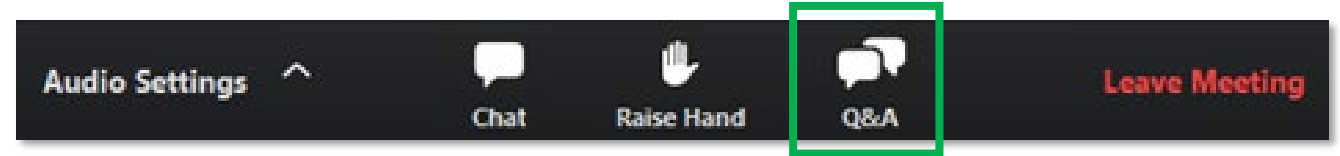
[Comfort Home NYHEP Introduction and Training Session \(05/06\)](#)

 May 6, 2025

 10:00 am - 11:00 am

Questions

1. Click the Q&A icon to ask questions.



Thank you

ComfortHome@nyserda.ny.gov

(888) 406-4009



NYSERDA