Comfort Home NYHEP Workflow
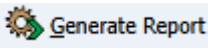# Frequently Asked Questions
5/27/2025

Training and Support

1. Where can contractors access training on the Comfort Home NYHEP workflow?
   a. This page includes video webinar recordings and a PDF copy of training slides: https://hpwescontractorsupport.com/program-resources/comfort-home-resources/

   b. A Comfort Home NYHEP data collection form will be available for download from: https://hpwescontractorsupport.com/program-resources/comfort-home-resources/

2. How does a contractor contact Contractor Support for Comfort Home?
   a. Call: 1-800-284-9069
   b. Email: support.residential@nyserda.ny.gov

   c. Live Chat: Click the button on the contractor support site at https://hpwescontractorsupport.com/
   d. Book an appointment for a help session via video call: Click the Book Appointment button on the contractor support site at https://hpwescontractorsupport.com/

Workflow

1. Where does the customer release form (aka Utility Release Form) get uploaded?
   a. After enrolling the customer in Comfort Home, navigate to the **Documents** page, then upload into the appropriate slot there.

2. Are geo-tagged pre-and post-work photos required for Comfort Home?
   a. Not at this time. The only photo times that photos are required are:
      i. Multi-unit building – photos of building exterior
      ii. Insulating walls in the attic – before and after photos are required.

3. If a contractor wants to upload photos, where should they do that?
   a. Combine the photos into one file (Word, PowerPoint, PDF, etc), then upload the file to the **Documents** page. You can use the PowerPoint template from EmPower+ if desired. When uploading, use the Mult-Unit Photo slot for a multi-unit building, all other photos can be uploaded as one file into the **Other Attachments** slot.

4. If insulating Attic Knee walls or Gable End Walls to qualify for Package B, do we need to provide both before and after photos of that work?
   a. Yes

5. Does the test-out form (post work completion form) need to be signed by the customer?
   a. Yes. At this time, it's not required to upload that form, but you must have it on file in case of audit or inspection.

6. How does NYHEP work to support the Green Jobs Green New York Residential Financing Program?
   a. After completing all Comfort Home assessment data entry and calculating the savings, a report can be printed from NYHEP that contains the necessary information to enter into the loan pro-forma web page for cost effectiveness calculations. To print the loan pro-forma export:
      i. Click the **Reports** [Reports (0)] navigation button.
      ii. Click the **Generate Report** [⚙ Generate Report] button.
      iii. In the Generate Report pop-up window, click the **Comfort Home Proforma Report** option from the drop-down list, then click the **OK** button.
   b. The report will be created and downloaded to the browser's download folder. Open it using Microsoft Excel® or Google Sheets® or other compatible spreadsheet viewer, then copy and paste the required information into the loan proforma web form.

7. Will contractors receive email notifications when review action is taken on a submitted assessment or installation?
   a. Yes, NYHEP is sending automated email notifications for each assessment approved or returned and for each installation approved or returned.

8. How can a contractor monitor what's been submitted, approved or returned?
    a. Log into NYHEP, hover over the Main Menu **Main Menu**, then click on **To Do List.**
    b. Filter for Workflow step = Assessment Started or Installation Started. In the list of results that display, look for rows where there's a date in the Initial Process Date column. These are assessments returned from review.

9. Can the installation be performed at the customer's home before the assessment is approved in NYHEP?
    a. Yes

10. The customer had a Comfort Home assessment which was submitted in Compass and the assessment incentive was paid. Now, after Comfort Home moved to NYHEP, the customer is ready to move forward with the project. How should that be handled in NYHEP?
    a. Search for customer in NYHEP, click on them, then using the Enrollments link in the left menu, enroll them in Comfort Home
    b. Enter existing conditions
    c. On the Measures tab, under the Contractor Assessment Fee measure, select "Yes" to zero out the Assessment Incentive in NYHEP.

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

    d. Save then Calculate Savings.
    e. Click Process to submit the assessment for review.
    f. Once the assessment is approved, start the Installation workflow and submit for package incentive

11. How should a contractor ensure that the $100 blower door test assessment incentive is applied correctly?
    a. When completing the assessment entry in NYHEP:
        i. On the Existing Conditions page, ensure that **Pre Work Blower Door Test Complete?** Is set to Yes.
        ii. On the Measure page, set the **I Qty** (installed quantity) for the **Blower Door Test – Assessment** measure to 1. Enter the **Test In Date**. **Blower Door Testing Notes** are optional.

12. After the assessment or installation is approved in NYHEP, why does the enrollment show as Install Started?
    a. NYHEP has a time-saving feature built-in where anytime that an assessment is approved, the Install Started workflow step is automatically created to make it quicker to access the installation workflow step. The same applies for an approved installation to tee up an additional installation if the customer chooses to have more work performed. There isn't any issue with enrollments remaining in an Install Started workflow step.

Existing Conditions

1. If the customer doesn't have a consistent delivered fuel supplier (for oil or propane), what should be entered for the supplier name and account number?
   a. For the supplier name, enter "Various". For the Account number, enter "1".

2. Is it required to collect fuel usage information and enter it into NYHEP?
   a. No. The customer account numbers are required to be entered, but not any consumption or usage data.

3. What if the home that isn't a ranch, cape cod, or colonial?
   a. If the home is a one-story ranch, choose Ranch. If the home is a cape cod, choose Cape Cod. For all other home types, choose Colonial.

4. When NYHEP asks for below grade square footage, is it asking for wall or floor?
   a. Fields like this are for floor square footage:

   Total Conditioned Space (sq ft)
   1600

   Total Below Grade Square Footage
   800

   b. Fields like this are looking for wall square footage:

   **Total Area of Foundation/Crawlspace Walls (sq ft)**

   Exterior Above Grade Walls (sq ft w/o windows)
   1600

5. What type of attic should be selected if the thermal boundary is being moved from the attic floor to the attic roof?
   a. On the Existing Conditions page, choose a Vented Attic if the thermal boundary will be moved from the attic floor to attic roof.

6. Can NYHEP support a home with two heating and cooling distribution systems?
   a. At this time, the savings calculation process is unable to model a home with a boiler and central A/C. At this time, enter the heating system as is, however adjust the cooling system data entry to reflect room A/C.

7. Can NYHEP support a home with a heat pump water heater?
   a. At this time, the savings calculation process is unable to model a home with a heat pump water heater. Temporarily follow this process:
      i. Enter the water heater as "storage", then enter "1" as the water heater efficiency.
      ii. On the Measures page, run the savings calculation.
      iii. On the Existing Conditions page, change the water heater to Heat Pump Water Heater, then enter the efficiency (like 2.5).
      iv. Save, generate and print reports, submit the assessment.

Making Corrections

1. How can a typo in the customer electric account number be corrected?
   a. IMPORTANT: Do Not enter the new account number directly in the Electric Utility Account # field
   b. Click the **Enrollment Profile** ![Enrollment Profile] button, then click the hyperlinked account number.
   c. Click the **Replace Account Number** button from the menu at the top of the page.
   d. In the window that displays, enter the correct electric account number, then click the **OK** button.

2. How can Existing Conditions be updated or edited?
   a. If the enrollment is in the Assessment Started workflow step, click the **Existing Conditions** button in the right navigation menu.
   b. If the enrollment is in the Assessment Review workflow step, contact the contractor support center (see page 1) to request that the Assessment be returned to you.
   c. If the enrollment is in the Install Started workflow step, click the **Workflow Step Detail**
      ![Workflow Step Detail] button in the right navigation menu. In the Visit Information section at the top of the screen, change the Outcome to **Reopen Assessment**, choose a reason in the **Reason** dropdown list, then click the **Process** button. Edit the Existing Conditions, add a **Note** then click the **Process** button to submit the assessment for approval. Once it is approved, resume the installation entries.
   d. If the enrollment is in the Install Review workflow step, contact the contractor support center (see page 1) to request that the Installation be returned to you. Then follow the instructions above (c) for the Install Started workflow step.

3. How can I cancel an enrollment that won't be submitted as an assessment?
   a. Email Contractor Support at support.residential@nyserda.ny.gov with the enrollment number and a short note requesting cancellation of the enrollment.

Adding Measures

1. Are changes in thermal boundary allowed? For instance, moving the attic thermal boundary from the floor to the roof and gable walls?
    a. Yes. On the Existing Conditions page, enter the current conditions. On the Measures page, enter the thermal boundary changes in the Package A measure properties.

2. On the Measures page, one or more packages aren't available to add. Why not?
    b. NYHEP compares the information entered on the Existing Conditions page to the Comfort Home program requirements. If the home's features meet the program requirements for a package, then that package won't be available to select.

8. The Calculate Savings doesn't work for package C. Why not?
    a. In the package C measure properties, make sure that SHGC and U-values are filled in for all four sides of the house, even if you aren't replacing any windows on that side.

Calculate Savings

1. A message displays when trying to Process (submit) saying that the savings are zero.
    a. From the Measures page, click the **Calculate Savings** button. The system will take about two minutes to calculate the project.

2. After clicking the **Calculate Savings** button on the Measures tab, the green and blue success messages display, but the savings don't show up on screen. What should be done to display the savings on-screen?
    a. The blue pop-up message reminds users to refresh the screen. Click your browser's refresh button

    ⟳ then click the NYHEP **Save** button.
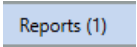
    The package modeled savings should display here:

#	⌃	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		$4,275.00	$4,275.00	$1,600.00	$1,600.00	4.1030	195.9200	19.5920

The project level savings, from the highest selected package, will display on the left side of the screen here:

Workflow Step Savings	
kWh:	4.1030
Therms:	195.9200
MMBTu:	19.5920

3. What should be done if an error displays during the Calculate Savings process?
    a. If the red error message contains specific feedback, check the entries in Existing Conditions and the details for each package on the Measures page.
    b. Check Existing Conditions for inconsistencies (for instance: primary heating fuel is natural gas and heating system is heat pump)
    c. Check Package B measure properties for completeness. Comfort Home program rules require insulation when a cold basement is present in addition to above grade walls.

EmPower+ and Comfort Home

1. A home has had weatherization work through EmPower+ and now will be having windows upgraded through Comfort Home. How can we manage the Comfort Home project in NYHEP?
    b. Log into NYHEP, hover over the **Main Menu**, then click on the **Customers** option.
    c. Enter the customer's name in the Search field then click the **Go** button.
    d. In the search results, click on the correct customer's name.
    e. From the customer summary, click the **Enrollments** tab in the left menu.
    f. Click the **New Enrollments** button.
    g. From the **Select a Program** dropdown list, choose **Comfort Home**.
    h. Click the **Next** button.
    i. Complete the normal Comfort Home NYHEP workflow. The existing conditions will reflect the home after the EmPower+ upgrades. This should result in NYHEP determining that Existing Conditions Meet Pkg A and Existing Conditions Meet Pkg B.

2. How can a customer report be printed?
    a. To view and print the assessment report for customer, click the **Reports** Reports (1) button in the right navigation menu, then click the **Generate Report** button.