

NYHEP Queue Management

Best Practices

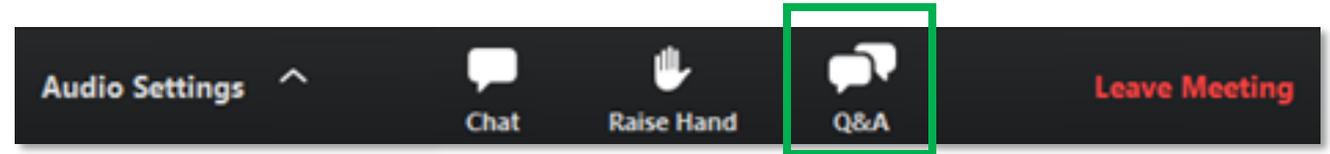
EmPower+ Participating Contractors

EmPower+ Program
May 2025



Questions

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



NYHEP Queue Management

Today's Webinar Agenda

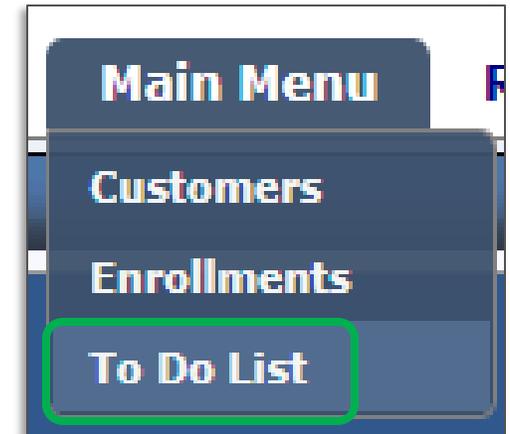
1. Using the To Do List
2. Exporting To Do List Report
3. Using Program Reports
4. How to Check the Status of Submitted Enrollments
5. Other Methods to Search for Enrollments
6. Monitoring Overdue Enrollments
7. Completion Timeline and Placing Enrollments On Hold
8. Provisional Approval and Contractor Assignment date
9. Questions?



NYSERDA

Using the To Do List

- The **To Do List** is the best way to monitor the status of your enrollments:
 - Can be filtered and sorted in a variety of ways
 - Can export the entire To Do List into an Excel spreadsheet or other document for easier tracking
 - Can help locate enrollments in steps no longer assigned to your company



Using the To Do List

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
<input type="text"/>				
Enrollment Number	Applicant First Name	Zip	To	To
<input type="text"/>				
Reference Number	Applicant Last Name	County		
<input type="text"/>	<input type="text"/>	All		
		Phone		
		<input type="text"/>		

Program: All

Trade Ally: All

Employee: Smith-Contractor, Steve

Community Hub - Trade Ally: All

Community Hub - Employee: All

Workflow Step: All

Workflow Step Status: All Open

Workflow Step Reason: All

Service Provider: All

Project Type: All

Approved Income Tier: All

Referral Source: All

Search

Program selection will impact available Workflow Steps

Sort by assigned Employee

Ex. For EmP+: Enrollment Acceptance, Workscope Submission, Final Project Submission

Useful for tracking On Hold enrollments

Full Comprehensive, Audit Install

Tier 1 or Tier 3

Using the To Do List

- Once the filtered list is pulled up, it can be further sorted in ascending or descending order by clicking on the headings in the blue banner:

<input type="checkbox"/>	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	Due Date
<input type="checkbox"/>				EmPower+	Open				14609	Monroe	Rochester Gas and Electric	Workscope Submission New	Full Comprehensive	Tier I - Low Income	Contractor	4/23/2025		5/23/2025
<input type="checkbox"/>				EmPower+	Open				11763	Suffolk	PSEG	Workscope Submission Awaiting Assignment NYSERDA	Full Comprehensive	Tier III - Moderate Income	Self Referral	4/23/2025		5/23/2025
<input type="checkbox"/>				EmPower+	Open				13041	Onondaga	National Grid - Upstate	Workscope Submission New	Full Comprehensive	Tier I - Low Income	Contractor	4/23/2025		5/23/2025

Using the To Do List

- You can Save search criteria for future reference using the **Save Search** button and naming your Search. Saved Searches will appear under “**Saved Queries**” at the top of the To Do List until deleted.

The screenshot shows the 'To Do List' interface with a 'Save Search' dialog box open. The dialog box has a title bar 'Save Search' and a close button 'X'. It contains a 'Search Name' field with the text 'Daily Workscope Submission-New' and 'OK' and 'Cancel' buttons. A green arrow points from the 'Save Search' button in the main interface to the dialog box. The main interface shows various search filters like Account Number, Customer Name, Program, and Workflow Step.

To Do List

Print Selected Work Orders Bulk Reassign Export Save Search

Click to Hide Search Details...

Account Number
Enrollment Number
Reference Number

Customer Name
Applicant First Name
Applicant Last Name

County
All

Phone

Created Date
From
To

Due Date
From
To

Program
EmPower+

Trade Ally
All

Employee
Smith-Contractor, Steve

Community Hub - Trade Ally
All

Community Hub - Employee
All

Workflow Step
Workscope Submission

Workflow Step Status
New

Workflow Step Reason
All

Service Provider
All

Project Type
Full Comprehensive

Approved Income Tier
Tier I - Low Income

Referral Source
All

Search

The screenshot shows the 'To Do List' interface with the 'Saved Queries' section highlighted. A green box highlights the 'Daily Workscope Submission-New' query with an 'X' icon next to it.

To Do List

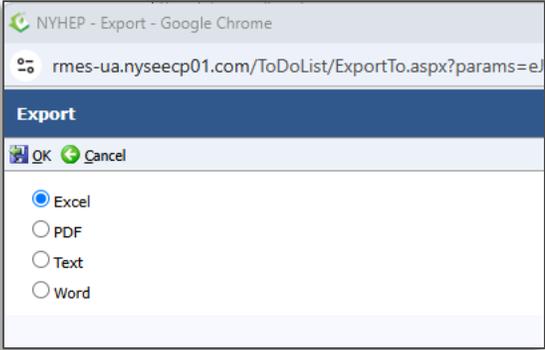
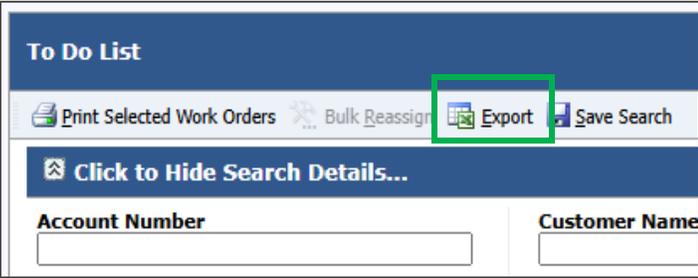
Print Selected Work Orders Bulk Reassign Export Save Search

Saved Queries

X Daily Workscope Submission-New

Exporting the To Do List Report

- The entire To Do List can be Exported into an Excel spreadsheet, PDF or Word document.
- Best way to monitor the status of your enrollments



Enroll #	Ref #	Program	Enrollment Status	Unit	City	State	ZIP	County	Service Provider	Workflow Step	Workflow Step Status	Project Type	Approved Income tier	Created Date	Initial Process Date	Due Date
		EmPower+	Open		Rochester	NY	14618	Monroe	ROCHESTER GAS AND ELECTRIC	Workscope Submission	New	Full Comprehensive	Tier I - Low Income	2/6/2025	2/28/2025	3/8/2025
		EmPower+	Open		Cottkill	NY	12419	Ulster	CENTRAL HUDSON GAS AND ELECTRIC	Workscope Submission	New	Full Comprehensive	Tier III - Moderate Income	1/30/2025		3/1/2025
		EmPower+	Open		Long Beach	NY	11561	Nassau	PSEG	Workscope Submission	New	Full Comprehensive	Tier I - Low Income	1/28/2025		2/27/2025
		EmPower+	Open		Arverne	NY	11692	Queens	MUNICIPAL ELECTRIC	Workscope Submission	New	Full Comprehensive	Tier I - Low Income	1/28/2025		2/27/2025
		EmPower+	Open		Centereach	NY	11720	Suffolk	PSEG	Workscope Submission	New	Full Comprehensive	Tier I - Low Income	1/28/2025		2/27/2025

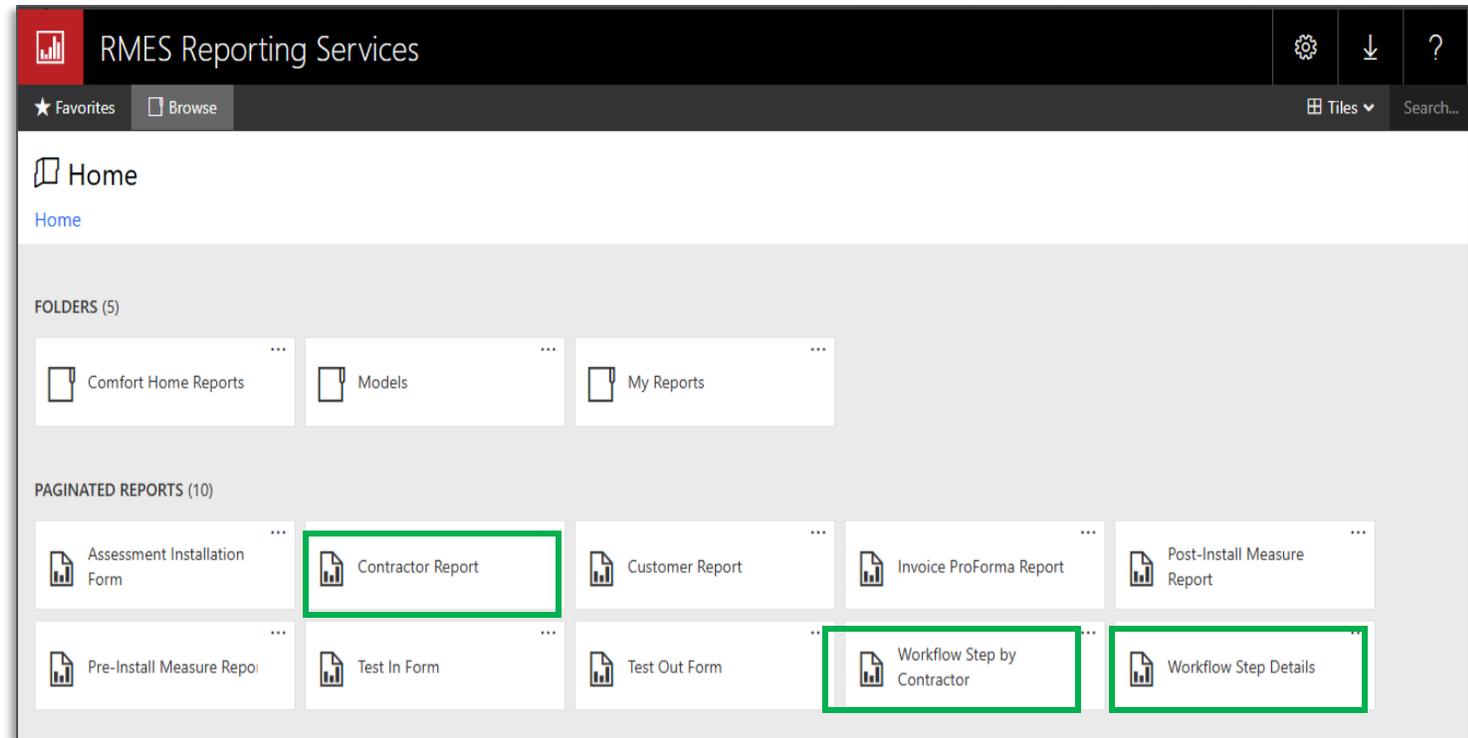
Using “Program Reports”

- Various Reports can also be accessed from the **Reports→Program Reports** menu.



- Contractor Report
- Workflow Step Details
- Workflow Step by Contractor

- Reports can be saved as Excel or other file types and printed.



Using “Program Reports”: Contractor Report

- **Contractor Report** allows you to select a date range based on when an enrollment entered its current step. In this example, we are looking at all Open enrollments that entered their current step between 1/1/2025-5/14/25.

Home > Contractor Report

Contractor: ABC HVAC | Enrollment Status: Open

Created Date From: 1/1/2025 | Created Date To: 5/14/2025

1 of 2 ?

Reference Number	Enrollment Number	Enrollment Contractor	Enrollment Employee	Application Number	First Name	Last Name	Enrollment URL
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=39147
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=53879
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=77791
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=81085
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=81127
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=81389
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=84787
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=84796
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=87910
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=87998
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=93127
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=93382
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=93484
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=95426
							https://homeportal.nyserda.ny.gov/Enrollments/WFStepList.aspx?eid=95809

Using “Program Reports”: Workflow Step Details

➤ **Workflow Step Details** is another option to produce a report similar to the To Do List Export. It can be filtered by Program and Workflow Steps.

➤ **NOTE:** This report will only show Enrollments in steps currently assigned to the Contractor (ie. Enrollment Acceptance, Workscope Submission, Final Project Submission).

Home > Workflow Step Details

Program: EmPower+ Contractor: ABC HVAC

Workflow Step(s): Contractor Assignment, Enrollment Workflow Step Status: Open

Tier: Project Types: ,Full Comprehensive

1 of 2 ? 100% Find | Next

Enrollment Number	Reference Number	Enrollment Date	Number of days since Enrollment Acceptance date	Project Due Date	Referral Source	Maximum Incentive	Enrollment Auto Approved	Program
		10/13/2023	35	08/08/2025	Self Referral	\$5,000.00	No	EmPower+
		02/23/2024	10	09/02/2025	Self Referral	\$10,000.00	No	EmPower+
		02/28/2024	209	02/15/2025	NYS Agency 2023	\$20,000.00	No	EmPower+
		04/18/2024	220	02/04/2025	Self Referral	\$10,000.00	No	EmPower+
		06/20/2024	304	11/12/2024		\$10,000.00	No	EmPower+
		07/17/2024	27	08/16/2025		\$10,000.00	No	EmPower+
		07/17/2024	31	08/12/2025	Contractor	\$10,000.00	No	EmPower+
		07/17/2024	133	05/02/2025	Contractor	\$10,000.00	No	EmPower+
		07/18/2024	20	08/23/2025	Self Referral	\$5,000.00	No	EmPower+
		08/14/2024	104	05/31/2025		\$10,000.00	No	EmPower+
		08/29/2024	87	06/17/2025	Utility	\$10,000.00	No	EmPower+
		09/06/2024	10	09/02/2025	Contractor	\$2,500.00	No	EmPower+
		09/06/2024	41	08/02/2025	Self Referral	\$10,000.00	No	EmPower+
		10/15/2024	55	07/19/2025	Self Referral	\$10,000.00	No	EmPower+
		10/16/2024	210	02/14/2025		\$10,000.00	No	EmPower+
		10/17/2024	203	02/21/2025		\$5,000.00	No	EmPower+
		10/31/2024	36	08/07/2025		\$5,000.00	Yes	EmPower+

Using “Program Reports”: Workflow Step by Contractor

- **Workflow Step by Contractor** provides a snapshot of how many enrollments are in each workflow step for each Program.

Home > Workflow Step by Contractor

Program: Comfort Home,EmPower+,Resider

Contractor: ABC HVAC

1 of 1

100%

Find | Next

Program	Workflow Step	Contractor	Total
Comfort Home	Assessment Started		11
		ABC HVAC	11
EmPower+	Enrollment Acceptance		6
		ABC HVAC	6
	Final Project Submission		34
		ABC HVAC	34
	Workscope Submission		48
		ABC HVAC	48
Residential Energy Assessments	Assessment Submission		1
		ABC HVAC	1

How to Check on Status of Submitted Enrollments

- **Workflow Steps** that are NOT assigned to a Contractor, such as Workscope Review or Final Project Review, cannot be selected in the To Do List.
- These Enrollments can still be viewed by selecting the **Workflow Step Status** of “Work Completed” along with the **Workflow Step** type (Workscope Submission or Final Project Submission).

The image shows a screenshot of a web form with two dropdown menus. The first dropdown is labeled 'Workflow Step' and has 'Workscope Submission' selected. The second dropdown is labeled 'Workflow Step Status' and has 'Work Completed' selected. A green rectangular box highlights both dropdown menus.

- This will display a list of Enrollments that have already been submitted and are no longer in a step assigned to you. You can click on the Enrollment # to pull up the Enrollment Profile and view the Step it is currently in.

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						
Contractor Assignment		Closed - Work Completed	2/6/2025	2/6/2025	1	
Enrollment Acceptance	Sherni's Test Contractor	Closed - Accepted	2/6/2025	2/6/2025	1	
Workscope Submission	Sherni's Test Contractor	Closed - Work Completed	2/6/2025	2/28/2025	22	WO
Pre-Engineering						
Workscope Review		Closed - Work Completed	2/28/2025	3/11/2025	11	
Enrollment						
Workscope Submission		Closed - Work Completed	3/11/2025	5/9/2025	59	
Pre-Engineering						
Workscope Review		Open - Unscheduled / Awaiting Results	5/9/2025			

Other Methods to Search for Enrollments

➤ In addition to the To Do List, enrollments can be located in multiple other ways:

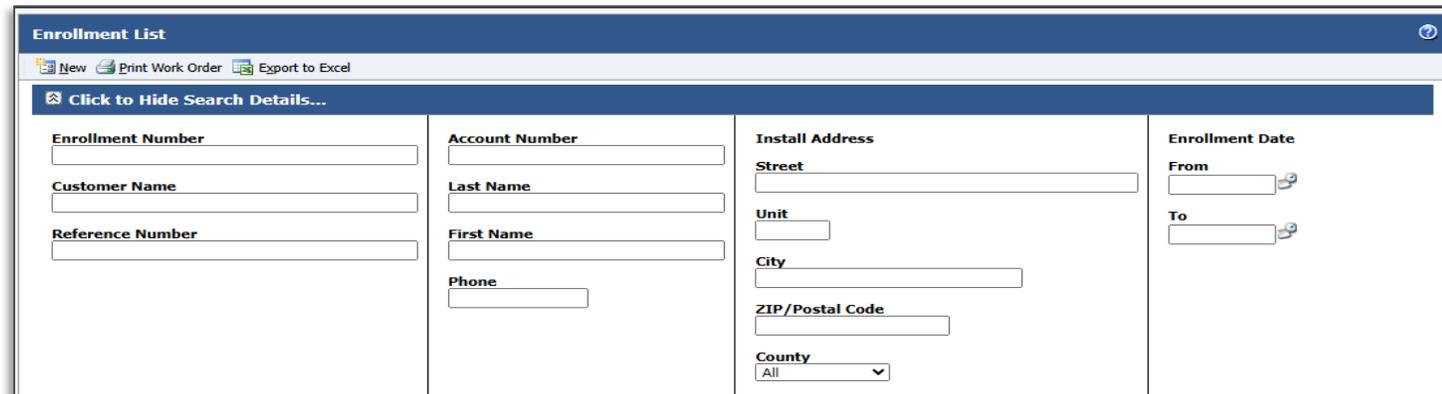
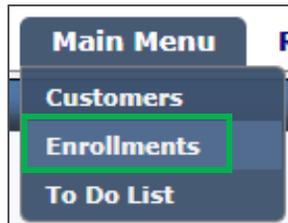
- ❑ **Global Enrollment Search** bar: Type in Name, Street Address or Enrollment #.



NEW YORK STATE | NYSEDA
NY Home Energy Portal

Global Enrollment Search
Search for enrollments...

- ❑ **Main Menu → Enrollments**



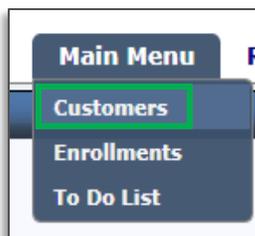
Enrollment List

New Print Work Order Export to Excel

Click to Hide Search Details...

Enrollment Number <input type="text"/>	Account Number <input type="text"/>	Install Address Street <input type="text"/>	Enrollment Date From <input type="text"/>
Customer Name <input type="text"/>	Last Name <input type="text"/>	Unit <input type="text"/>	To <input type="text"/>
Reference Number <input type="text"/>	First Name <input type="text"/>	City <input type="text"/>	
	Phone <input type="text"/>	ZIP/Postal Code <input type="text"/>	
		County All	

- ❑ **Main Menu → Customers:** Search by Name or Address



Customer List

New

Search Type: General Search Go Show Historical ?

Customer List

New

Search Type: General Search Go

Monitoring Overdue Enrollments

- NYHEP has SLA's (Service Level Agreements) programmed for each Workflow Step. Think of them as "Due Dates".
- An Enrollment in **Workscope Submission** for more than 30 days, or **Final Project Submission** for more than 75 days, will turn **Red** indicating it is now "Overdue".
 - ❖ We will discuss Final Project Submission due dates in more detail on the next slide.

<input type="checkbox"/>	Enroll. #	Ref. #	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	Due Date
<input type="checkbox"/>			EmPower+	Open				12419	Ulster	Central Hudson Gas and Electric	Workscope Submission New Sherri's Test Contractor	Full Comprehensive	Tier III - Moderate Income		1/30/2025		3/1/2025

- Focus on these enrollments first.
- **Enrollment Acceptance** has a 5 business day (7 calendar day) SLA. Enrollments in this step DO NOT turn red. Once they expire, the Enrollment will be re-assigned automatically.

Enrollment Acceptance Information	
Due Date 05/08/2025	Assign To ABC HVAC
Assignment Method	Employee Jones, Bob
Outcome Rejected	Reason Due Date Expired

Completion Timeline and Placing Enrollments “On Hold”

- Effective May 1, **contractors are expected to complete projects within 90 days** following notification of the final work scope submission stage in NYHEP. [Section 5.21](#) of the **Program Manual** has been updated to reflect this change.
- Contractors with more than 20% of their enrollments in violation of this completion deadline will not be assigned any new Enrollments.
- If you know that project a will take longer than 90 days to complete, you can place the Enrollment On Hold. This removes the Enrollment from the 20% Overdue calculation.

Final Project Submission - Unscheduled / Awaiting Results

Process Save Close Expand All Collapse All Enrollment Profile Add Measures Scan Measures Calendar Double Dip Report

Visit Information

Due Date: 07/28/2025

Assign To: ABC HVAC

Employee: Jones, Bob

Outcome:
 Work Complete
 Cancel
 On Hold

Reason:
(Click to Select)
(Click to Select)
Contractor Issue
Customer Request
Premise Issue

Scheduled Date: []
Actual Visit Date: 05/14/2025
Drive Mileage: 0 miles

Start Time: []
Time In: []
Drive Time: 0.00 hours

Duration: []
Time Out: []

- Add a Note in Notes section explaining why Enrollment is being placed On Hold.

Workflow Step Note

Create New - Note

Save Delete Close

Note Date: 05/14/2025 Note Time: 11:44 AM

Notes
Placing Enrollment On Hold due to customer leaving for vacation. Unable to complete in 90 day timeframe.

Who can view this note?
 Users with access to this enrollment
 Users with access to this workflow step

Provisional Approval and Contractor Assignment Date

- As announced in April, all projects that have received technical approval at the **Workscope Review** step will move to the **Provisional Approval** step. These projects will be reviewed once a week by NYSERDA management and a weekly batch will be approved at that time (currently each Monday).
- One of the primary criteria used to identify which projects will be selected for approval is Enrollment Date, with the oldest Enrollments selected first.

- The **1st Contractor Assignment start date** is what is being used to determine this.

Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date	Total # Days
Enrollment					
Contractor Assignment		Closed - Work Completed	4/10/2025	4/10/2025	1
Enrollment Acceptance		Closed - Rejected	4/10/2025	4/17/2025	7
Contractor Assignment	CLEARResult	Closed - Work Completed	4/17/2025	4/17/2025	1
Enrollment Acceptance		Closed - Rejected	4/17/2025	4/24/2025	7
Contractor Assignment	CLEARResult	Closed - Work Completed	4/24/2025	4/24/2025	1
Enrollment Acceptance		Closed - Rejected	4/24/2025	5/1/2025	7
Contractor Assignment	CLEARResult	Closed - Work Completed	5/1/2025	5/2/2025	1
Enrollment Acceptance		Closed - Rejected	5/2/2025	5/9/2025	7
Contractor Assignment	CLEARResult	Closed - Work Completed	5/9/2025	5/12/2025	3
Enrollment Acceptance		Closed - Rejected	5/12/2025	5/12/2025	1
Contractor Assignment	CLEARResult	Open - Awaiting Assignment	5/12/2025		
Workscope Submission	NYSERDA	Open - Awaiting Assignment	4/10/2025		

Questions?



NYSERDA

Thank you

Contractor Support:
Support.residential@nyserda.ny.gov

(800) 284-9069



NYSERDA