

Correct Project Type Selection

Effective August 31, 2026, contractors will be required to select the correct Project Type (Full Comprehensive, Audit Install) in NYHEP that aligns with the work being performed in the home.

NYHEP will be enforcing this requirement at Final Project Submission based on the measures selected. Enrollments with Full Comprehensive selected for the Project Type with only assessment and direct install measures completed will need to be rolled back to Workslope Submission and updated.

No project should be changed to a Muni Install unless directed by NYSERDA or CLEAResult.

NYHEP Assigned Project Types

Full Comprehensive

- owner occupied, rental with signed landlord agreement
- assessment, direct install and eligible measures

Audit Install

- rental, no signed landlord agreement
- assessment and direct install only (rental or owner occupied)

Muni Install

- municipal electric supplier
- assessment, limited direct install and eligible measures

Step 1: Return an Enrollment from Final Project Submission to Workscope Submission

At Final Project Submission select:

1. Outcome = **Cancel**
2. Reason = **Modify workscope submission**
3. Click **Process**
4. If prompted, add a **Note** indicating that the enrollment is being returned to change the project type.

The enrollment will return to Workscope Submission.

The screenshot shows a software interface with a top navigation bar containing 'Scan Measures', 'Calendar', and 'Double Dip Report'. Below the navigation bar, there is a dropdown menu with the text 'ractor, Steve'. To the right of the dropdown, a yellow box labeled '1' contains the 'Outcome' section with three radio button options: 'Work Complete', 'Cancel' (which is selected), and 'On Hold'. To the right of the 'Outcome' box, another yellow box labeled '2' contains the 'Reason' section. It features a search bar with '(Click to Select)' and a magnifying glass icon. Below the search bar, there are three options: '(Click to Select)', 'Customer not responsive', and 'Modify workscope submission' (which is highlighted in blue with a hand cursor icon). At the bottom of the 'Reason' box is the option 'Update utility and incentive information'.

Final Project Submission - Unscheduled / Awaiting Results

 Process
  Save
  Close
  Expand All
  Collapse All
  Enrollment Profile
  Add Measures
  Scan Measures

3

Visit Information

Due Date: 07/07/2026

Assign To: Sherri's Test Contractor

Employee: Smith-Contractor, Steve

Workflow Step Note

Create New - Note

 Save
  Delete
  Close

Note Date: 07/02/2026

Note Time: 2:06 PM

4

Notes

Changing project type

Step 2: Adjust Project Type

Project Type selection is adjusted at Workscope Submission >> Applicant Information tab >> Additional Applicant Information section.

Workscope Submission - Applicant Information - Awaiting Assignment

 Process
  Save
  Close
  Expand All
  Collapse All
  Enrollment Profile
  Double Dip Report
  Update Customer

Processing Information

Community Hub - Trade Ally	Community Hub - Employee	Outcome	Reason

Applicant Information

Usage & Fuel Information

Upon selecting Audit Install, users will need to select a reason for the change.

1. Project Type = **Audit Install**
2. Project Type Change Reason = select the best option from dropdown list
3. Click **Save**

Additional Applicant Information

Assigned Project Type
Full Comprehensive

Maximum Incentive Amount
\$12,000.00

****Number of Household Members**
1

Children age 17 years or younger
0

Referral Source

1

****Project Type**

Audit Install

(Click to Select)

Full Comprehensive

Muni Install

Audit Install

No Show

0

2

****Project Type Change Reason**

(Click to Select)

(Click to Select)

No opportunities

Customer Refused Work/Access

Non-program work needed

Health & Safety to be addressed first

Other

Details Provided by Customer

Step 3: Zero-Out Previously Proposed Measures

All proposed Full Comprehensive measures will need to be adjusted to a Quantity = 0. Navigate to the Workscope Submission >> Measures tab.

1. P Qty = 0 for all measures

- Zeroed out measures will be gray instead of black
- Previously proposed measures cannot be deleted

Workscope Submission - Measures - New								
Process Save Close Enrollment Profile Add Measures Double Dip Report								
Enrollment Measures								
#	▼	Measure Name	Measure		Measure Cost		Incentive	
			Unit	P Qty	Unit Price	Amount	Unit Price	Amount
1	▼	ADD MEASURE - Mileage (MILE)	Miles	0	\$0.00	\$0.00	\$0.00	\$0.00
2	▼	ADD MEASURE - Assessment Fee (ASSESS)	Each	1	\$200.00	\$200.00	\$200.00	\$200.00

Step 4: Add Audit Install Measures

Project Type will influence the measures available. **Audit Install measure codes end in "_AI".**

1. Click on **Add Measures** then **check the boxes** for each completed assessment and direct install measure (don't forget FUNDINFO_AI). Click Save
2. **Update** the properties of all newly added measures.

Workspace Submission - Measures - New

Process Save Close Enrollment Profile **Add Measures** Double Dip Report

1

Add Measures

☐	No. to Add	Measure Code	Measure Name
☐			
☒	1	MILE_AI	ADD MEASURE - Mileage
☒	1	ASSESS_AI	ADD MEASURE - Assessment Fee
☒	1	BOT_IN_AI	ADD MEASURE - Blower Door Test - Test IN
☒	1	CAZT_IN_AI	ADD MEASURE - Combustion Appliance Zone (CAZ) Test - Test IN
☐		DETC_AI	Detectors - CO, Smoke and Combo
☐		PI_AI	DHW Pipe Insulation
☐		DOW_AI	DHW Pressure Relief Valve

Save Close

Workspace Submission - Measures - New

Process

Save

Close

Enrollment Profile

Add Measures

Double Dip Report

Enrollment Measures

#			Measure Name	Measure			Measure Cost		Incentive	
				Unit	P Qty	I Qty	Unit Price	Amount	Unit Price	Amount
1	✓	✗	ADD MEASURE - Mileage (MILE_AI)	Miles			\$0.00	\$0.00	\$0.00	\$0.00
2	✓	✗	ADD MEASURE - Assessment Fee (ASSESS_AI)	Each		1	\$200.00	\$200.00	\$200.00	\$200.00
3	✓	✗	ADD MEASURE - Blower Door Test - Test IN (BDT_IN_AI)	Each		1	\$0.00	\$0.00	\$0.00	\$0.00
4	✓	✗	ADD MEASURE - Combustion Appliance Zone (CAZ) Test - Test IN (CAZT_IN_AI)	Each		1	\$0.00	\$0.00	\$0.00	\$0.00
5	✓	✗	ADD MEASURE - Funding Information (FUNDINFO_AI)	Each		1	\$0.00	\$0.00	\$0.00	\$0.00
6	✓		ADD MEASURE - Mileage (MILE)	Miles	0		\$0.00	\$0.00	\$0.00	\$0.00
7	✓		ADD MEASURE - Assessment Fee (ASSESS)	Each	0		\$0.00	\$0.00	\$0.00	\$0.00

Upon resubmission, the project will advance directly to Final Project Review.