

# New Software Pilot Orientation

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# Rules of Engagement

- Please mute line during presentation
- “Raise hand” for clarifying questions
- Dedicated Q&A at end of presentation
- Webinar will be recorded & posted on contractor support site under “trainings”

# Orientation Goals

At the end of the orientation, you should understand:

- The purpose of the pilot
- NYSERDA's data requirements
- How to upload HPXML files to the Portal
- What to do if you encounter an error when uploading a file
- Upcoming changes in data validation & how these changes will impact your work

# Purpose of Pilot

Evaluate ability of each tool to:

- Support minimum program data requirements
- Export HPXML compliant files

# Testing

## Phase I

- Sample project files tested for support of most common measures + fuel switch
- Completed (as of 11/17): OptiMiser, Auditor, Snugg Pro

*Pending: TREAT, Cake, Hancock, Energy Pioneer Solutions*

## Phase II

- HP contractors use software to model *a minimum of 50 projects per tool*
- Include a diversity of measures & heating fuel types

# Pilot Activities

## Contractors

- Model projects using new software
- Include diverse mix of measures & heating fuel types
- Report errors to software tool and/or CSG help line

## NYSERDA

- Coordinate pilot activities to ensure goals are met
- Facilitate contractor trainings
- Approve new tools for use in Program

## Modeling Tools

- Support HPXML & minimum program requirements
- Provide training & technical support to contractors
- Fix bugs in timely manner

## CSG/EnergySavvy

- Communicate data requirements to modeling tools
- Validate projects to ensure compliance with HPXML & NYSERDA data requirements

# Pilot Outcomes

- Contractors are able to use tool to export HPXML files
- Identify number and type of measures each tool supports
- Understand how fields are calculated for each tool (e.g. energy savings, R-value)
- Software provides training & technical support to contractors

# What is Validation?

An automated check in the Portal to ensure that the HPXML file complies with the minimum program requirements

- Simply put, the Portal (Optix) will scan for errors to reduce data entry in the Eligibility Screening Tool (EST)



# There Are Two Types of HPXML Files

## Audit files

- Describe existing conditions
- Include recommended measures (e.g., workscope)

## Retrofit files

- Include information about what was actually improved

# When Does Validation Occur?

Validation is performed any time you upload an HPXML file to the Portal. Validation occurs 3 times:

1. When you upload your comprehensive file (audit file type)
2. When you upload your contract file (audit file type)
3. When you upload your final project submission file (retrofit file type)

*\*\* To avoid error messages, check with your software tool to learn how to choose the correct file at each task. Language used to describe file types may vary among tools and may differ from the language used in the Portal.*

*\*\* Validation will be launched with the new workflow.*

# Portal Task = HPXML File Type

To ensure project files pass validation, choose the correct HPXML file type at each task.

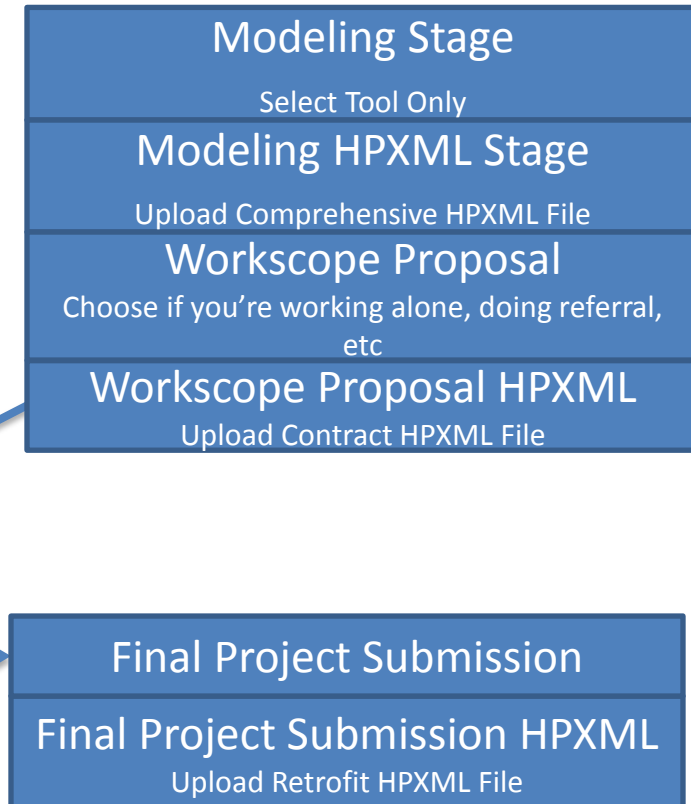
- Modeling HPXML = Audit file type
- Workscope Proposal HPXML = Audit file type
- Workscope Combined Package HPXML = Audit file type (if applicable)
- Final Project Submission HPXML = Retrofit file type

# Upcoming Changes to Workflow

## Current Workflow



## New Stages, Replacing Old



No delay

# Complete Modeling Task

## Complete Modeling

Due in 15 days

Assigned Nov. 14, 2014 [Jump to Timeline](#)

Due date: Nov. 28, 2014

[Extend Due Date](#) [This task can not be completed](#) [Add Note](#) [View Project Page](#)

## Complete Modeling

Due in 15 days

Assigned Nov. 14, 2014 [Jump to Timeline](#)

Due date: Nov. 28, 2014

[Extend Due Date](#) [This task can not be completed](#) [Add Note](#) [View Project Page](#)

\* Required fields

**What modeling software are you using? \***

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If you are using RHA, please login to RHA to complete your modeling.

Select "TREAT 3.4 and later" **only** if you are participating in the HPXML pilot at NYSERDA. If you are not a pilot participant, but are using TREAT v3.4, select "TREAT 3.3 and earlier" **and** export the "NY Workscape Upload" by using the export toolbar in TREAT. Upload that file in the "Home Performance Comprehensive Recommendations File" field.

[Add a Note \(optional\)](#) +

[Send Now](#) [Save & Send Later](#)

Financing Summary:

- Loan application
- Loan status
- Subsidy application
- Subsidy status

[More information...](#)

**Previous workflow:**  
Choose modeling software & submit Home Performance Comprehensive Recommendations File

**New workflow:**  
Choose modeling software, but no need to submit Home Performance Comprehensive Recommendations File

# Complete Modeling HPXML Task

## Complete Modeling HPXML

Due in 6 days

Assigned Nov. 14, 2014 [Jump to Timeline](#)

**Due date:** Nov. 19, 2014

\* Required fields

**Modeling HPXML File \***

No file chosen

**New workflow:**  
Has a separate stage to upload the modeling HPXML file

# Complete Workscope Proposal Task

**Complete Workscope Proposal** Due in 15 days

Assigned Nov. 14, 2014 [Jump to Timeline](#)

**Complete Workscope Proposal** Due in 15 days

Assigned Nov. 14, 2014 [Jump to Time](#)

**Due date:** Nov. 28, 2014

[Extend Due Date](#) [This task can not be completed](#)

**\* Required fields**

**Project referral type \***

- My company is working on this project alone
- My company is referring work to another NYSERDA contractor
- My company was referred by another NYSERDA contractor
- My company is using a subcontractor for this project

By selecting "Send Now" I agree to be bound by the terms of the current Home Performance with ENERGY STAR Contractor Partnership Agreement in effect at the time of this submission. I also acknowledge that I have been provided with a copy of the current Contractor Resource Manual in effect at the time of this submission, have read and understand its contents, agree to adhere to the procedures and requirements, and understand that submitting any false or manipulated data will result in disciplinary action, including but not limited to, permanent termination from the program.

[Add Note](#)

[View Project Page](#)

**Financing Summary:**

- [Loan application](#)
- [Loan status](#)
- [Subsidy application](#)
- [Subsidy status](#)

[More information...](#)

**Previous workflow:**  
Select subcontractor,  
submit workscope  
contract &  
workscope combined  
package

**New workflow:**  
Select subcontractor.  
Additional  
documents will be  
uploaded later.

# Complete Workscope Proposal HPXML Task

## Complete Workscope Proposal HPXML

Due in 6 days

Assigned Nov. 14, 2014 [Jump to Timeline](#)

**Due date:** Nov. 19, 2014

[Extend Due Date](#) [This task can not be completed](#)

[Add Note](#)

[View Project Page](#)

\* Required fields

**Workscope Contract Package HPXML \***

[Choose File](#) No file chosen

Please submit your modeling software contract package.

[+](#)

[Send Now](#) [Save & Send Later](#)

**New workflow:**  
Has a separate stage to upload the workscope contract package HPXML file



# Complete Workscope Combined Package HPXML Task

## Complete Workscope Combined Package HPXML

Due in 6 days

Assigned Nov. 14, 2014 [Jump to Timeline](#)

**Due date:** Nov. 19, 2014

\* Required fields

**Workscope Combined Package HPXML File \***

No file chosen

If working with another contractor, please submit a contract package for the combined work.

**New workflow:**  
Upload combined package HPXML file if you are working with a subcontractor

# Complete Final Project Submission Task

**Complete Final Project Submission** Due in 64 days

Assigned Nov. 14, 2014 [Jump to Timeline](#)

Due date: Jan. 16, 2015

Extend Due Date This task can not be completed

Add Note

View Project Page

\* Required fields

**Signed contract \***

Choose File No file chosen

**Completion signature page/Signed project incentives and financing eligibility summary report \***

Choose File No file chosen

**Post installation health & safety test results \***

Choose File No file chosen

Subcontractor work order

Choose File No file chosen

Other completion documents

Choose File No file chosen

Appliance receipts

Choose File No file chosen

Storm relief declaration form

Choose File No file chosen

**Previous workflow:**  
Upload final documents, including completion package

**New workflow:** Upload final documents, NOT including completion package

# Complete Final Project Submission HPXML task

## Complete Final Project Submission HPXML

Assigned Nov. 14, 2014

Due date: Nov. 19, 2014

Extend Due Date    This task can not be completed

\* Required fields

**Final Project HPXML File \***

Choose File    No file chosen

If working with another contractor, please submit a contract package for the combined work.

Add a Note (optional)

Send Now    Save & Send Later

Due in 6 days

[Jump to Timeline](#)

Add Note

View Project Page

**New workflow:**  
Upload final  
project HPXML  
file

# Known Issues

## 1. Blank measure list in EST

Solution: Wait 30 seconds, refresh browser

This is caused by the moving through the workflow too quickly. The data in EST hasn't yet had time to sync to its database.

## 2. Manually input data (e.g., map measures) in EST

Contractors will continue to manually input some measures into EST (e.g., pre-and post-R-values) until EST/Optix is updated (est. 12/2014), but automation will continue to improve.

## 3. Reporting health & safety/qualified accessories

Software tools are in the process of coding standardized “program codes” into tools to facilitate automatic mapping of non-energy savings measures. Until this process is completed, contractors will continue to manually select measures in EST.

# Known Issues

## 4. Not every tool can model every measure

But if the tool does support a measure, it must support the required data for that measure (e.g., if a clothes washer was installed, indicate if it is ENERGY STAR certified).

## 5. PSE&G Long Island does not support HPXML

Please continue to use RHA for PSE&G projects.

## 6. You may encounter errors during the pilot

We are working with developers to ensure the majority of NYSERDA's minimum data requirements + HPXML validation are coded into each tool *prior to starting the pilot*. However, not all measures and other project elements have been incorporated into tools and tested. If you receive an error message, notify the software or CSG to report the error. *Some bugs may require development work to resolve*. In this case, you have the option to wait until the error is resolved or to remodel the project in your current modeling tool.

# Received an Error Message: Now What?

- Contact software tool to notify them of error
- Contact CSG at [contractorsupport@csggrp.com](mailto:contractorsupport@csggrp.com)

# Pilot Contacts

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