

NYHEP Customer Report Mapping

Page 1 – Summary

- The opening paragraph will **auto-fill** based on the program, contractor, and customer information.

Congratulations on taking an important first step! An energy assessment through NYSERDA's **Residential Energy Assessments** Program can help improve your home's energy usage.

Test Contractor has completed a thorough energy assessment at the home of **Customer Name**, located at **Customer Address, Albany, NY 12210**. 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** section will match what is modeled at the conclusion of the Existing Conditions Tab.

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)			✓

Based on your existing energy usage, you could save **1103.7** therms in energy usage by following the recommendations in this report. The details are on the following pages. A therm is a standard unit used to measure energy use.

Summary	
**Building Envelope Needs Improvement	**Heating and Cooling Fair
**Water Usage and Water Heating Good	**Appliance and Lighting Good

- The **Therm Savings** will reflect the total savings for all measures that appear on the report.
- Contractor Information** will auto-fill based on your contractor profile.
 - If this needs to change, add the auditor as the primary to the 'Trade Allies' table on the Applicant Information tab.

Assessment Prepared By:

Company Name: Test Contractor

Assessor Name: One Employee

Assessor Email:

Company Phone:

Company Website:

Completed Date: February 6, 2023

Page 2 – Building Envelope – Insulation Measures

Recommendations for your home:

Category	Existing Condition	Existing Condition Rating	Recommendation
Attic Insulation	6" Fiberglass-Batts	Needs Improvement	5" Open Cell Foam
Wall Insulation	1" Fiberglass-Batts	Needs Improvement	4" Dense pack
Foundation Insulation	0" NONE	Needs Improvement	1" Foam Board
Air Leakage	Very Leaky	Needs Improvement	Air Seal - Attic Plane, Plumbing Penetrations
Dominant Window Type	Single-Pane	Needs Improvement	Upgrade to ENERGY STAR Windows

Annual Savings Potential of Building Envelope Recommendations: 97.1 therms.

- **Therm Savings** will only reflect the total savings for the 5 measures listed above.
- **Foundation Insulation** will pull all information from the Rim Joist existing conditions and measures.
- **Insulation Existing Condition** will auto fill based on information from the Existing Conditions tab.

Shell - Insulation

**Attic 1 - Sq. Ft.

**Attic 1 - Insulation Type

**Attic 1 - Insulation Depth (in)

**Attic 1 - Insulation Grade

- **Insulation Existing Condition Rating** will auto fill based on the existing condition selection from the Insulation Grade chart listed below.

Less than 10% Voids or Compression	Good
10% to 25% Voids or Compression	Fair
More than 25% Voids or Compression	Needs Improvement

- **Insulation Recommendation** will auto fill based on information entered in the Measures tab.

2	^	✖	Insulation - Attic 1 (INS_A1)	Each	1	\$0.00
Is this recommended for the assessment only (no incentives or loans)?:			Yes			
**Insulation Location:			Slopes			
Existing Insulation Type:			Fiberglass-Batts			
Existing Insulation Depth:			6			
Existing Insulation Area:			500			
**Insulation Condition:			Fair			
Is the existing insulation being removed?:			No			
New Insulation Area:			500			
**New Insulation Type:			Open Cell Foam			
**New Insulation Depth (This is the added insulation):			5			

Page 3 Building Envelope – Air Leakage

Recommendations for your home:

Category	Existing Condition	Existing Condition Rating	Recommendation
Attic Insulation	6" Fiberglass-Batts	Needs Improvement	5" Open Cell Foam
Wall Insulation	1" Fiberglass-Batts	Needs Improvement	4" Dense pack
Foundation Insulation	0" NONE	Needs Improvement	1" Foam Board
Air Leakage	Very Leaky	Needs Improvement	Air Seal - Attic Plane, Plumbing Penetrations
Dominant Window Type	Single-Pane	Needs Improvement	Upgrade to ENERGY STAR Windows

- **Air Leakage Existing Condition and Rating** will auto fill based on the Estimated Air Leakage existing condition selection and chart below.

Shell - Air Infiltration

**Blower Door Test Complete? Yes

**Attic Air Sealing None

****Estimated Air Leakage** Very Leaky

Very Leaky	Needs Improvement
Leaky	
Average	Fair
Faily Tight	Good
Tight	

- **Air Leakage Recommendation** will auto fill based on information entered in the Measures tab.

1 ^ X Air Sealing (AS) Home 1

Is this recommended for the assessment only (no incentives or loans)?: Yes

Number of Stories Above Grade: 1.5

Number of Bedrooms: 3

Exposure To Wind: Shielded

Blower Door Test Completed?: Yes

Pre Air Sealing Air Infiltration (CFM50): 3000

**Post Air Sealing Air Infiltration (CFM50): 2,500.0

Pre Air Sealing Air Infiltration (ACH50): 7.5

Post Air Sealing Air Infiltration (ACH50): 6.25

Attic Plane:

Basement:

Canned/Recessed Lighting:

Cantilever:

Electrical Penetrations:

Knee Wall:

Living Spaces:

Plumbing Penetrations:

Page 4 Building Envelope – Windows

Recommendations for your home:

Category	Existing Condition	Existing Condition Rating	Recommendation
Attic Insulation	6" Fiberglass-Batts	Needs Improvement	5" Open Cell Foam
Wall Insulation	1" Fiberglass-Batts	Needs Improvement	4" Dense pack
Foundation Insulation	0" NONE	Needs Improvement	1" Foam Board
Air Leakage	Very Leaky	Needs Improvement	Air Seal - Attic Plane, Plumbing Penetrations
Dominant Window Type	Single-Pane	Needs Improvement	Upgrade to ENERGY STAR Windows

- **Dominant Window Type Existing Condition** will auto fill based on information from the Existing Conditions tab and the chart below.

Shell - Windows

**Existing Window Type 1

Single-Pane

Single-Pane	Needs Improvement
Failed Double-Pane	
Intact Double-Pane	Fair
Code	Good

- **Dominant Window Recommendation** will always auto fill to Upgrade to ENERGY STAR Windows.

Page 5 – Heating and Cooling Systems – Primary Heating System (ASHP)

Category	Existing Condition	Existing Condition Rating	Recommendation
Primary Heating System	Boiler Hot Water, 80% Efficiency	Fair	Air Source Heat Pump - Central Ducted, 15 HSPF
Primary Cooling System	Central Air Conditioner, 15 SEER	Fair	Air Source Heat Pump - Central Ducted, 15 HSPF
Thermostat	Programmable	Fair	Wi-Fi Thermostat
Duct Work	Attic - poorly vented	Needs Improvement	Comprehensive Duct Sealing

Annual Savings Potential of Heating and Cooling Recommendations: 951.8 therms.

- **Therm Savings** will only reflect the total savings for the 4 measures listed above.
- **Heating System Existing Condition and Rating** will auto fill based on the information from the existing conditions tab and the chart below.

HVAC - Primary Heating

****Heating System Status**

Safe to Operate

****Heating System Primary**

Boiler Hot Water

****Heating Efficiency Primary**

0.80

Forced Air Furnace, Boiler Hot Water, Boiler Steam	Needs Improvement	.79 or lower
	Fair	.80 - .90
	Good	.90 or higher
Electric Baseboard	Needs Improvement	Always
Air Source Heat Pump	Needs Improvement	HSPF2 below 6
	Fair	HSPF2 6-7.4
	Good	HSPF2 7.5 or higher
Ground Source Heat Pump	Good	Always
Wood or Pellet Stove, Other	Needs Improvement	Always

- Heating System Recommendation will auto fill based on information entered in the Measures tab.

3	^	X	Air Source Heat Pump (ASHP)	Each	1	\$0.00
Is this recommended for the assessment only (no incentives or loans)?:			Yes			
Heat Pump Information Form:			<input type="checkbox"/> No pre-existing full house air conditioning <input checked="" type="checkbox"/> Interested in a heating system with low <input type="checkbox"/> Other: Please describe other Heat Pump			
**Will this ASHP project satisfy 90-120% of the load?:			Yes			
**ASHP Configuration Type:			Central Ducted			
**ASHP Controls:			Separate			
**Make:			test			
**Model:			test			
**Efficiency Rating Standard:			SEER/HSPF			
**Replacement Cooling Efficiency - SEER:			20.0			
**Replacement Heating Efficiency - HSPF:			15.0			
**ASHP Size (rated cooling capacity) Btu/h:			25000			
**Maximum Heating Capacity 5 Degrees:			5			
**Building Heating Load (Manual J) Btu/h:			25000			
**Number of Outdoor Units Installed:			1			
**Override Heating and Cooling Load?:			No			
Is there a supplemental electric strip heater being installed in the air handler?:			<input type="checkbox"/>			
Duct Work Cost:						
Dollar Savings:			\$0.00			
Lifetime Savings:			\$0.00			

Category	Existing Condition	Existing Condition Rating	Recommendation
Primary Heating System	Boiler Hot Water, 80% Efficiency	Fair	Air Source Heat Pump - Central Ducted, 15 HSPF
Primary Cooling System	Central Air Conditioner, 15 SEER	Fair	Air Source Heat Pump - Central Ducted, 15 HSPF
Thermostat	Programmable	Fair	Wi-Fi Thermostat
Duct Work	Attic - poorly vented	Needs Improvement	Comprehensive Duct Sealing

Annual Savings Potential of Heating and Cooling Recommendations: 951.8 therms.

- **Cooling System Existing Condition and Rating** will auto fill based on the information from the existing conditions tab and the chart below

HVAC - Primary Cooling **Cooling System Central Air Conditioner **Cooling System Type Packaged **Cooling Efficiency 15.0	Room Air Conditioner	Needs Improvement	Always	
	Central Air Conditioner	Needs Improvement	SEER2 12 or below	EER2 8 or lower
		Fair	SEER2 13-14	EER2 9-10
		Good	SEER2 15 or higher	EER2 11 or higher
	Air Source Heat Pump	Needs Improvement	SEER2 12 or below	EER2 8 or lower
		Fair	SEER2 13-14	EER2 9-10
		Good	SEER2 15 or higher	EER2 11 or higher
	Ground Source Heat Pump	Good	Always	

- **Cooling System Recommendation** will auto fill based on information entered in the Measures tab.

3	^	X	Air Source Heat Pump (ASHP)	Each	1	\$0.00
Is this recommended for the assessment only (no incentives or loans)?:			<input type="text" value="Yes"/>			
Heat Pump Information Form:			<input type="checkbox"/> No pre-existing full house air conditioning <input checked="" type="checkbox"/> Interested in a heating system with low <input type="checkbox"/> Other: Please describe other Heat Pump			
**Will this ASHP project satisfy 90-120% of the load?:			<input type="text" value="Yes"/>			
**ASHP Configuration Type:			<input type="text" value="Central Ducted"/>			
**ASHP Controls:			<input type="text" value="Separate"/>			
**Make:			<input type="text" value="test"/>			
**Model:			<input type="text" value="test"/>			
**Efficiency Rating Standard:			<input type="text" value="SEER/HSPF"/>			
**Replacement Cooling Efficiency - SEER:			<input type="text" value="20.0"/>			
**Replacement Heating Efficiency - HSPF:			<input type="text" value="15.0"/>			
**ASHP Size (rated cooling capacity) Btu/h:			<input type="text" value="25000"/>			
**Maximum Heating Capacity 5 Degrees:			<input type="text" value="5"/>			
**Building Heating Load (Manual J) Btu/h:			<input type="text" value="25000"/>			
**Number of Outdoor Units Installed:			<input type="text" value="1"/>			
**Override Heating and Cooling Load?:			<input type="text" value="No"/>			
Is there a supplemental electric strip heater being installed in the air handler?:			<input type="checkbox"/>			
Duct Work Cost:			<input type="text"/>			
Dollar Savings:			<input type="text" value="\$0.00"/>			
Lifetime Savings:			<input type="text" value="\$0.00"/>			

Category	Existing Condition	Existing Condition Rating	Recommendation
Primary Heating System	Boiler Hot Water, 80% Efficiency	Fair	Air Source Heat Pump - Central Ducted, 15 HSPF
Primary Cooling System	Central Air Conditioner, 15 SEER	Fair	Air Source Heat Pump - Central Ducted, 15 HSPF
Thermostat	Programmable	Fair	Wi-Fi Thermostat
Duct Work	Attic - poorly vented	Needs Improvement	Comprehensive Duct Sealing

Annual Savings Potential of Heating and Cooling Recommendations: 951.8 therms.

- **Thermostat Existing Condition and Rating** will auto fill based on the information from the existing conditions tab and the chart below.

Appliances - Thermostat

****Thermostat Type**

Programmable

Manual	Needs Improvement
Programmable	Fair
WiFi or Learning	Good

- **Thermostat Recommendation** will auto fill based on information entered in the Measures tab.

7 ^ X Programmable Thermostat (PT) Each 1

Is this recommended for the assessment only (no incentives or loans)?: No

Programmable Setback Thermostat Units Installed: 0

Wi-Fi Connected Thermostat Installed: 1

Page 8 – Heating and Cooling Systems – Duct Work

Category	Existing Condition	Existing Condition Rating	Recommendation
Primary Heating System	Boiler Hot Water, 80% Efficiency	Fair	Air Source Heat Pump - Central Ducted, 15 HSPF
Primary Cooling System	Central Air Conditioner, 15 SEER	Fair	Air Source Heat Pump - Central Ducted, 15 HSPF
Thermostat	Programmable	Fair	Wi-Fi Thermostat
Duct Work	Attic - poorly vented	Needs Improvement	Comprehensive Duct Sealing

Annual Savings Potential of Heating and Cooling Recommendations: 951.8 therms.

- **Duct Work** Information will pull from Primary Heating System. If the Primary Heating System has no duct work the report will pull from the Primary Cooling System. **Duct Work Existing Condition** will auto fill based on the information below from the Existing Conditions tab.

****Primary Cooling Duct Location (Supply and Return)**

Attic - poorly vented

- **Duct Work Existing Condition Rating** will auto fill based on the information below from the Measures tab.

13 ^ X Duct Sealing & Insulation (DUCTSI) Each 1

Is this recommended for the assessment only (no incentives or loans)?: No

**Heating and Cooling System Configuration: AC/Heat Pump Capacity <650...

Total Length of Ductwork (Feet): 0

Unconditioned Ductwork Length (Feet): 0

Heating Capacity BTU/h: 150000

****Duct Leakage: 15%**

**Duct Location: Attic

15%, 20%, 25%, 30%	Needs Improvement
8%	Fair
Ducts Modeled with No Recommendation	Good

- **Duct Work Recommendation** will always auto fill to Upgrade to Comprehensive Duct Sealing.

Page 9 – Appliances and Lighting

Category	Existing Condition	Recommendation
Primary Refrigerator	Needs Improvement	Upgrade to ENERGY STAR
Dehumidifier	ENERGY STAR	No Recommendation
Lighting	30% Incandescent, 30% CFL, 40% LED	Replace with LED Lighting

Annual Savings Potential of Appliances and Lighting Recommendations: 167.9 kWh

- kWh Savings will only reflect the total savings for the 3 measures listed above.

Refrigerator/Dehumidifier Existing Conditions and Recommendation will auto fill based on the information from the existing conditions tab and the chart below.

****Is the Primary Refrigerator ENERGY STAR/CEE Rated?**

No

Yes	ENERGY STAR	No Recommendation
No	Needs Improvement	Upgrade to ENERGY STAR

Lighting Existing Conditions will auto fill based on the information below from the Existing Conditions tab.

Appliances - Bulbs

% of Incandescent % % of CFL % % of LED %

Lighting Recommendation will always auto fill to Replace with LED Lighting

Category	Existing Condition	Existing Condition Rating	Recommendation
Water Heating System	0.70 UEF Standard DHW Tank	Needs Improvement	0.92 UEF Heat Pump Water Heater
Pipe Insulation	1 inch Copper	Needs Improvement	6 Feet Fiberglass

Annual Savings Potential of Water Heating Recommendations: 41.7 therms

** Therms Savings will only reflect the total savings for the 2 measures listed above.

Water Heating System Existing Condition and Rating will auto fill based on the information from the existing conditions tab and the chart below.

WH - Water Heating

Water Heater System Status

****Hot Water Fuel Type**

****Water Heater System (Existing)**

****Water Heater Efficiency (UEF)**

Electric Standard DHW Tank	Needs Improvement	Always
Fossil Fuel - Standard DHW Tank, Indirect Water Heater, Power-Vented Tank	Needs Improvement	.79 or lower
	Fair	.80 - .86
	Good	.86 or higher
Gas On Demand Water Heater	Needs Improvement	.87 and lower
	Fair	.87 - .95
	Good	0.95 or higher
Heat Pump Water Heater	Good	Always

Water Heating System Recommendation will auto fill based on information entered in the Measures tab.

6 ^ x **Water Heater - DHW Tank (DHW)** Each

Is this recommended for the assessment only (no incentives or loans)?:

****Make:**

****Model #:**

Mobile Home Rated?:

****Replacement Water Heater Efficiency (UEF) Enter as a Decimal:**

****Replacement Water Heater System:**

Page 11 – Water Heating - Pipe Insulation

Category	Existing Condition	Existing Condition Rating	Recommendation
Water Heating System	0.70 UEF Standard DHW Tank	Needs Improvement	0.92 UEF Heat Pump Water Heater
Pipe Insulation	1 inch Copper	Needs Improvement	6 Feet Fiberglass

Annual Savings Potential of Water Heating Recommendations: 41.7 therms

Pipe Insulation will only display if it is modeled on the Measures tab as a recommendation.

When recommended, Existing Condition Rating will always display as Needs improvement.

11	^	×	DHW Pipe Insulation (PI)	Linear Foot	6	\$0.00
Is this recommended for the assessment only (no incentives or loans)?:			<input type="text" value="Yes"/>			
**Pipe Type:			<input type="text" value="Copper"/>			
**Insulation Type:			<input type="text" value="Fiberglass"/>			
**Pipe Diameter (inches):			<input type="text" value="1"/>			
**Pipe Insulation Thickness (inches):			<input type="text" value="1"/>			
Linear Feet of Pipe Insulation (feet):			6			

Health, Safety, and Other Considerations

The conditions listed below were seen during your home energy assessment. Although they may not have a direct effect on your energy use, you may want to consider upgrades to maintain the overall condition of your home.

Dryer Vent Repair
Gas Leak

Notes from One Employee:

test notes

Health and Safety recommendations will be listed based on information for the Measures Tab.

12	▼	✗	Dryer Vent Repair (DVREPAIR)	Unit(s)	
13	▼	✗	Duct Sealing & Insulation (DUCTSI)	Each	1
14	▼	✗	Gas Leak (KED_GASL)	Each	

To create a note for your customer, navigate to the Notes tab, and select New Note

Applicant Information

Usage & Fuel Information

Existing Conditions

Partner Information

Notes (1)

Documents (0)

Measures (14)

Overrides

Reports (20)

Application History

Assessment Submission Workflow Step - Notes

New Note Close

Date	Origin	Created By	Notes
4/20/2023	Assessment S...	Wagner, Steve	test notes

Fill in the Notes section then select This is an Interaction and select Customer Report from the drop down menu.

Assessment Submission Workflow Step - Note

Save Delete Close New Email

Origin
Assessment Submission

Note Date
04/20/2023

Notes
test notes

Who can view this note?

Users with access to this enrollment

Users with access to this workflow step

This is an Interaction

Interaction Type
Customer Report

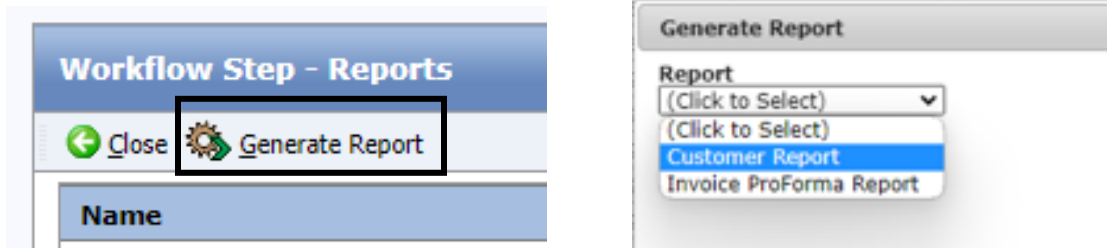
Interaction Reason
No options available

Page 13 – How to Generate the Customer Report

Navigate to the **Reports** tab.

Workflow Step Detail
Usage & Fuel Information
Existing Conditions
Partner Information
Notes (1)
Contact Attempts (0)
Documents (0)
Overrides
Reports (18)
Workflow Step History

Click **Generate Report**, then select **Customer Report** from the drop-down menu.



Your report will generate as a PDF with the naming convention:

Customer Report – Enrollment # - Date – Time

Workflow Step - Reports		
Name	Create Date	Created By
Customer Report-1001198_20230413_1511.pdf	4/13/2023	Wagner, Steve

After the report is generated, it should be reviewed with the customer and sent via email or printed out for their records, and consideration.