



NYSERDA

Standards & Quality Assurance

Combined Residential Application Inspection Process

- Assisted Home Performance with Energy Star
- EmPower

January 20, 2022

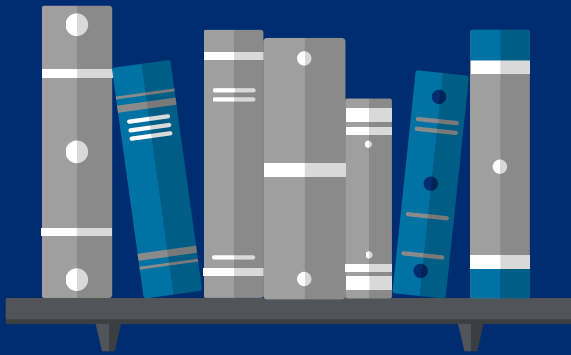
Honeywell



Objective

To provide program and technology updates for Honeywell regarding the Combined Residential Application Inspection Process.

SQA Inspection Process



AGENDA

Introduction

Program Changes & Process Overview

The NYSERDA Partner Portal

Scheduling Inspections

Configuring the Inspection Checklist

Documenting Inspection Results

Reviewing & Approving Inspections

Post Inspection Report

Additional Resources & Support

Introduction

Changes to the Combined Residential Application Inspection Process will be implemented on 02/01/2022.

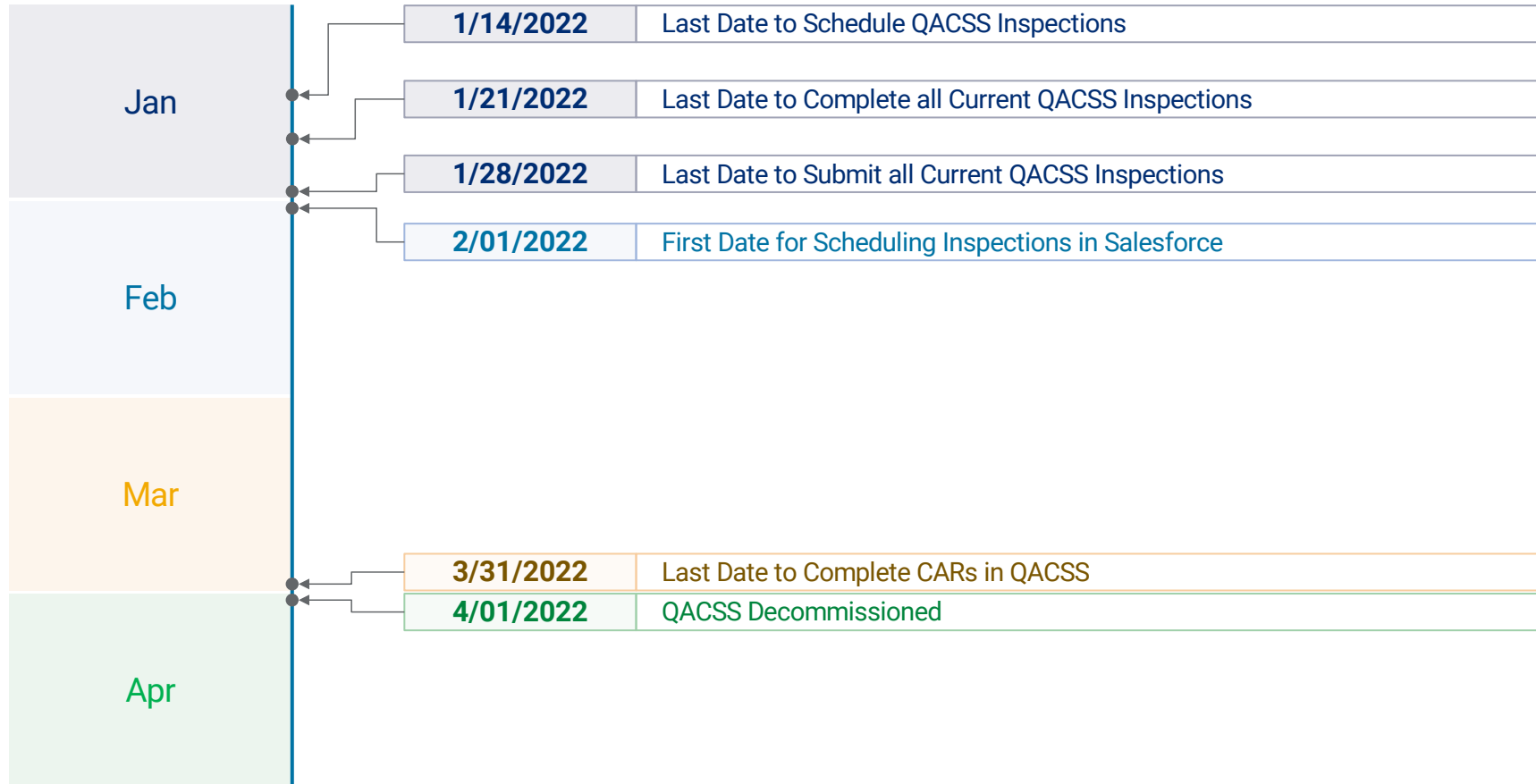
In particular, the system we will begin using to manage all aspects of the inspection process will migrate from QACSS to Salesforce, otherwise known as the NYSERDA Partner Portal.

To prepare you for these changes we have created this training session to walk you through expectations and requirements that will ensure your continued success while partnering with NYSERDA.

Program Changes & Process Overview

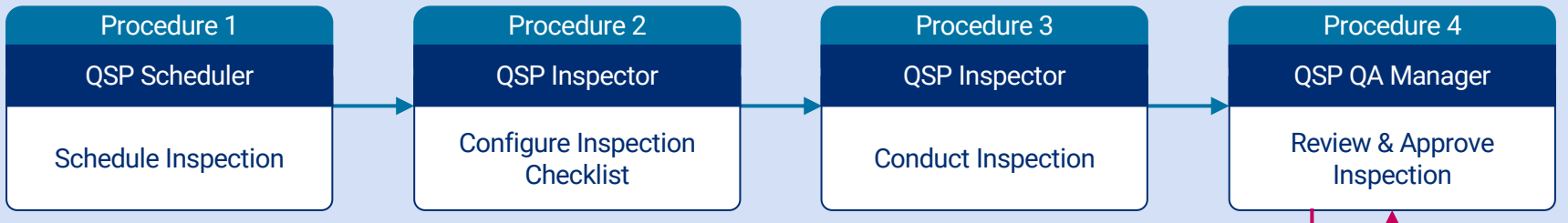


Program Changes & Process Overview

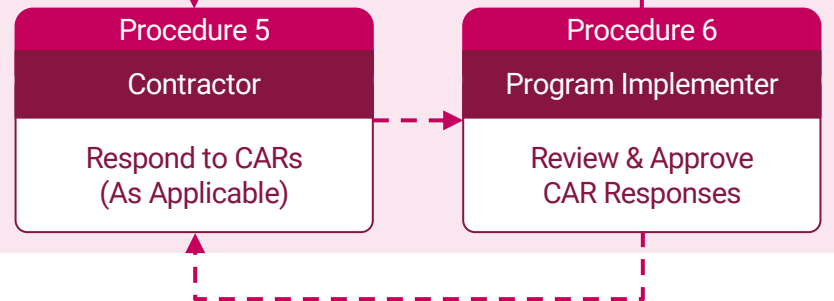


Program Changes & Process Overview

All Inspections



Corrective Action Required Path (Inspection Scores of 1 Or 2)



The NYSERDA Partner Portal



The NYSERDA Partner Portal

Access the NYSERDA Partner Portal:

<https://portal.nyserda.ny.gov/login>

Welcome to the NYSERDA Partner Portal

Login Instructions:

Your **Username** is typically your email + ".nyserda" on the end.

Example: If your email is abc@gmail.com, your username will be abc@gmail.com.nyserda

You can also find your username in the welcome email sent to you from NYSERDA.

Residential Customers

If you are a residential user trying to enter in an application, then please login here: [Residential Customer Portal](#)

Username

Password

[Forgot Your Password?](#)

Scheduling Inspections



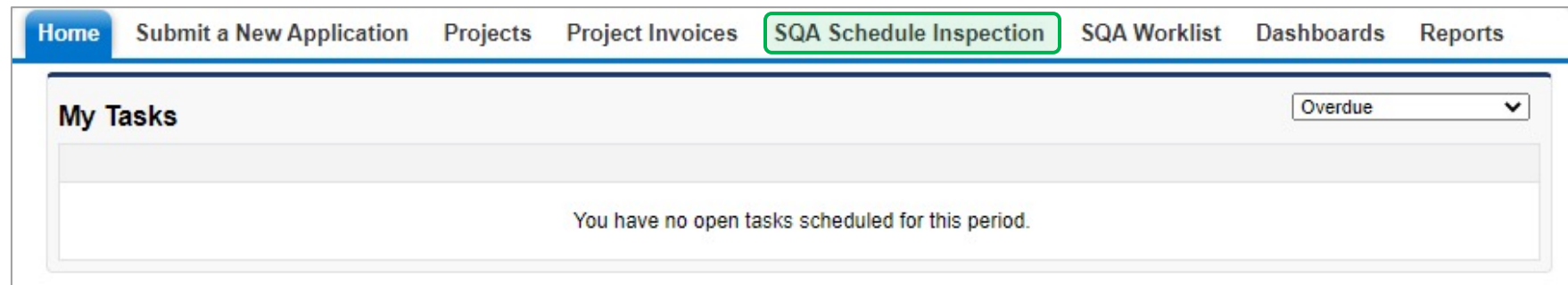
Scheduling Inspections

Inspections are scheduled utilizing the **SQA Schedule** Inspections tab.

Recently completed projects will appear in the SQA Schedule Inspection tab for 90 days, after which they will not appear in the **SQA Schedule** Inspection tab.

Projects that are older than 90 days and require an inspection can be manually updated by the **NYSERDA QA Manager**.

Once an inspection is scheduled, the project record will move to the **SQA Worklist** tab.



The screenshot shows a web application interface with a navigation bar at the top. The navigation bar contains several tabs: Home, Submit a New Application, Projects, Project Invoices, SQA Schedule Inspection (highlighted with a green border), SQA Worklist, Dashboards, and Reports. Below the navigation bar is a section titled "My Tasks" with a dropdown menu set to "Overdue". The main content area of the "My Tasks" section is empty and contains the text: "You have no open tasks scheduled for this period."

Configuring the Inspection Checklist



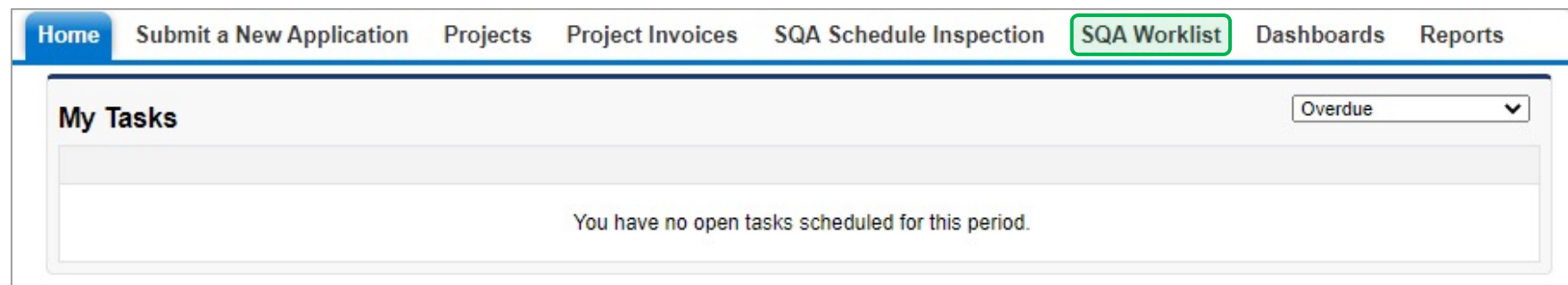
Configuring the Inspection Checklist

Inspection Checklists can be configured up until the inspection is conducted.

Use this tab to access scheduled Project Inspection Records to:

- Update a previously scheduled inspection
- Configure the Inspection Checklist and document inspection findings

The screenshot below displays the access point for the **SQA Worklist**. Inspectors use this tab to access **Project Inspection Records** once the inspection has been scheduled. Inspection Checklists can be accessed from the **Project Inspection Record**.



Documenting Inspection Results

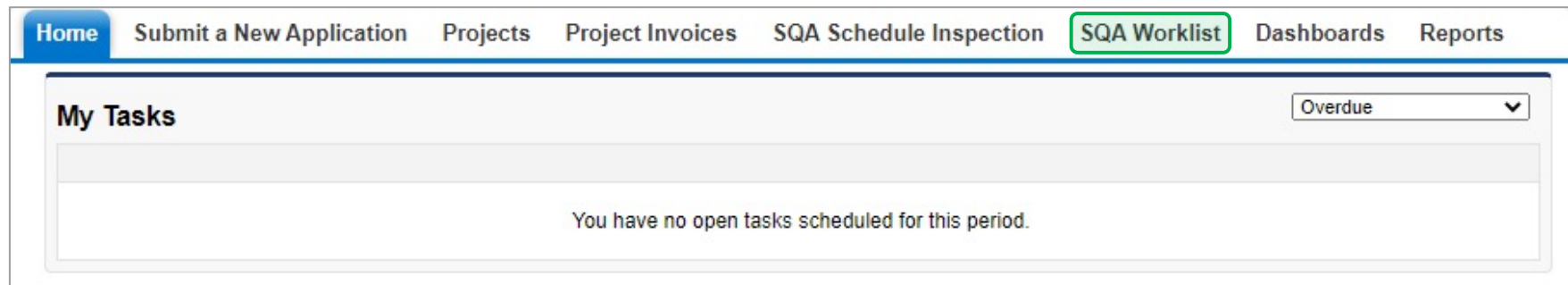


Documenting Inspection Results

Inspection findings are documented on the **Inspection Checklist** associated with the **Project Inspection Record** in the **NYSERDA Partner Portal**.

Inspectors should document inspection findings on the checklist either during the inspection or once it has been physically completed.

When documenting findings on the checklist post-inspection, be sure to capture photos of all non-conformances to be added to the checklist for failed tasks.



The screenshot shows the top navigation bar of the NYSERDA Partner Portal. The navigation items are: Home, Submit a New Application, Projects, Project Invoices, SQA Schedule Inspection, SQA Worklist (highlighted with a green border), Dashboards, and Reports. Below the navigation bar is a section titled "My Tasks" with a filter dropdown menu set to "Overdue". The main content area of the "My Tasks" section is empty and contains the message: "You have no open tasks scheduled for this period."

Reviewing & Approving Inspections

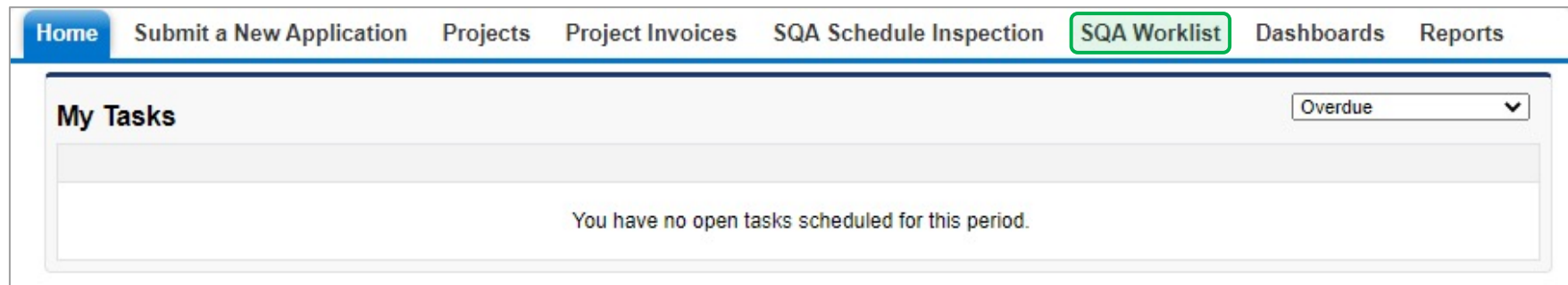


Reviewing & Approving Inspections

Inspections are reviewed and approved by Honeywell QA Managers.

Honeywell QA Managers utilize the **SQA Worklist** tab to filter and access:

- Inspection Projects requiring approval (Project Status is QA Manager Approval Needed)
- Inspection Projects where Contractors have contested CARs and the Program Implementor approves the contested CARs (Project Status is Contested - QA Manager Review Needed)



The screenshot shows a web application interface with a navigation bar at the top. The navigation bar includes the following tabs: Home, Submit a New Application, Projects, Project Invoices, SQA Schedule Inspection, SQA Worklist (highlighted with a green border), Dashboards, and Reports. Below the navigation bar, there is a section titled "My Tasks" with a dropdown menu set to "Overdue". The main content area of the "My Tasks" section is empty and contains the text: "You have no open tasks scheduled for this period."

Post Inspection Report



Post Inspection Report

Inspection reports are generated once the Honeywell QA Manager approves an inspection conducted by a Honeywell Inspector.


Inspection Reports are only updated/changed if a Contractor successfully contests any CARs (resolved CARs will not affect the inspection score or report).

Inspection Report updates are made by the NYSERDA QA Manager.

If changes are made to the initial Inspection Report, Honeywell QA Managers must manually update the Project Inspection Record to reference the updated Inspection Report for future emails sent to the Contractor.

Combined Residential Application

FIELD INSPECTION REPORT


NEW YORK
STATE OF
OPPORTUNITY. | NYSERDA

Printed by: Rick Sehein on 1/7/2022 3:47 PM.

Application No.	Grade	Score (Maximum of 5)
0000316425	Pass	5

Contractor Name:	Climate Giant, Inc.	Report Issue Date:	1/7/2022 3:47 PM
Contractor Email:		Customer Name:	Laura Volta
Builder Name:		Customer Address:	13 Gary Hill Dr, NULL, \u003Cbr/\u003ERochester, New York, Monroe, \u003Cbr/\u003E14624
Builder Email:			
Project Type:	Full Comprehensive		

A post-completion field inspection has been completed for the above referenced project and a grade of PASS has been assigned reflecting successful compliance with Program standards. No further action is required. Congratulations on your commitment to quality workmanship.

[Printable View](#)

- [Home](#)
- [Submit a New Application](#)
- [Projects](#)
- [Project Invoices](#)
- [SQA Schedule](#)

 **Project Inspection**
PI-025815

[Activity History \[1\]](#) |
 [Notes & Attachments \[1\]](#) |
 [Approval History \[2\]](#) |
 [Project Inspection History \[5+\]](#)

Project Inspection Detail



Inspection Checklist

Review Failed Tasks

View/Print Inspection Report PDF



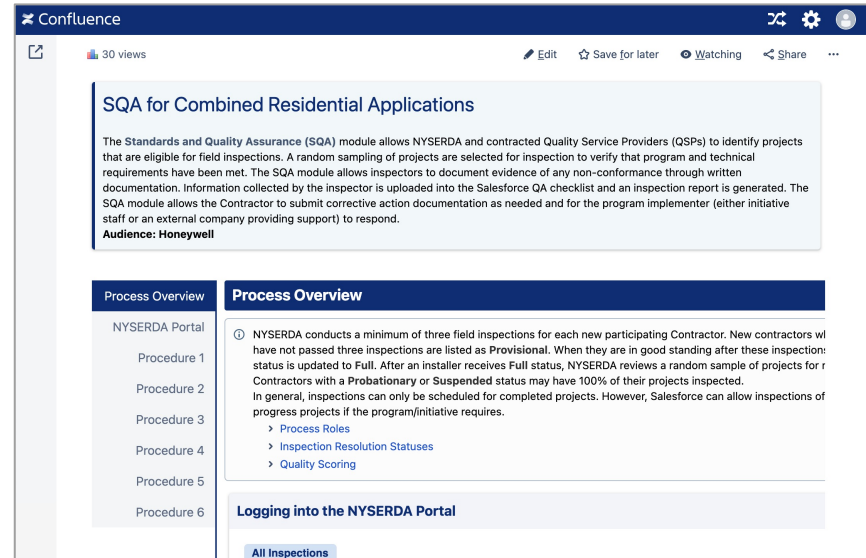
Additional Resources & Support



Additional Resources & Support

Link to Materials in the PUBLIC Knowledge Base

<https://knowledge.nyserra.ny.gov/pages/viewpage.action?pageId=99877685>



The screenshot shows a Confluence page with the following content:

- Page Title:** SQA for Combined Residential Applications
- Text:** The Standards and Quality Assurance (SQA) module allows NYSERDA and contracted Quality Service Providers (QSPs) to identify projects that are eligible for field inspections. A random sampling of projects are selected for inspection to verify that program and technical requirements have been met. The SQA module allows inspectors to document evidence of any non-conformance through written documentation. Information collected by the inspector is uploaded into the Salesforce QA checklist and an inspection report is generated. The SQA module allows the Contractor to submit corrective action documentation as needed and for the program implementer (either initiative staff or an external company providing support) to respond.
- Audience:** Honeywell
- Process Overview:**
 - NYSERDA Portal
 - Procedure 1
 - Procedure 2
 - Procedure 3
 - Procedure 4
 - Procedure 5
 - Procedure 6
- Main Content:**
 - NYSERDA conducts a minimum of three field inspections for each new participating Contractor. New contractors who have not passed three inspections are listed as **Provisional**. When they are in good standing after these inspections, their status is updated to **Full**. After an installer receives **Full** status, NYSERDA reviews a random sample of projects for r Contractors with a **Probationary** or **Suspended** status may have 100% of their projects inspected. In general, inspections can only be scheduled for completed projects. However, Salesforce can allow inspections of progress projects if the program/initiative requires.
 - Process Roles
 - Inspection Resolution Statuses
 - Quality Scoring
- Logging into the NYSERDA Portal**
 - All Inspections

Q & A



