

# BGE Quick Home Energy Checkup Program

Policies and Procedures (updated 04/30/2013)

Program Manager: Tony Crane

Schedule Managers: Becky Bushong

AuditTracker System Administrator: Chris Fisher

## 1. Scheduling and confirmation procedure

- a. *Initial scheduling from BGE Scheduler* – the Schedule Manager is responsible for ensuring that customer requests in the BGE Scheduler system are responded to within 48 hours of the customer's request, and the customer information is entered into AuditTracker. [www.bgesmartenergy.com](http://www.bgesmartenergy.com), click "Partner Login" at the upper right, username "efficienthome", password "Efficient1!".
- b. ***If the customer has included an email address***, the first available appointment complying with the customer's request details (morning / evening, certain days of week, etc) shall be assigned and saved both in AuditTracker and the BGE Scheduler, with a "Tentative" status.
  - i. The BGE Scheduler sends the customer the proposed appointment information.
  - ii. If the customer responds to the BGE email, the BGE Scheduler will show the status of the appointment as "Confirmed". When possible, the AuditTracker should then be updated to "Initial Confirmation".
  - iii. Three business days prior to the appointment, AuditTracker sends an automated email to the customer's email address. The customer has the option to call the office or click a link in the email, which then sets the AuditTracker appointment status to "Final eConfirmation".
  - iv. One day before the appointment, if the status is still "tentative" or "Initial Confirmation", the Schedule Manager will check the BGE Scheduler status.
    1. If that too is "tentative", the Schedule Manager will call the customer directly to confirm. If no one answers, a message should be left requiring the customer to call either the office or auditor to confirm, or the appointment will be assumed cancelled.
    2. If the appointment status in the BGE Scheduler is "Confirmed", the Schedule Manager will call the customer directly to confirm, and if necessary leave a message to call the office or auditor if the customer needs to reschedule the appointment.
- c. ***If the customer did not include an email address***, then the customer must be contacted by phone.
  - i. Once an appointment has been agreed to by the customer, the BGE Scheduler status is set to "Confirmed" and the AuditTracker schedule is set to "Initial Confirmation".
  - ii. One day before the appointment, the Schedule Manager calls the customer to remind them of the appointment. If leaving a message, the office phone number or the auditor's direct phone number should be included with instructions for the customer to call to confirm, and if necessary leave a message to call the office or auditor if the customer needs to reschedule the appointment.

## 2. Auditor duties and responsibilities – The auditor is responsible for performing the QHEC, processing the QHEC, and keeping sufficient QHEC supplies on hand.

- a. *QHEC Appointment*
  - i. The auditor is responsible for arriving at the customer's home within 10 minutes of the scheduled time. If running late, the auditor will call the customer to give them an updated time of arrival.
  - ii. If circumstances prevent the auditor from keeping the appointment, it is the auditor's responsibility to contact the customer and arrange rescheduling at the customer's convenience.
  - iii. The auditor is responsible for ensuring that an adequate supply of the possible improvement measures to be offered to the customer are in his/her vehicle at all times.
- b. *QHEC Post-processing* - Within 48 hours of the completion of the QHEC, the auditor must either log the customer appointment as a "no-show":
  - i. With the Intranet interface of AuditTracker, select the customer who no-showed.
  - ii. Click the "+" sign to expand the Client Schedule.
  - iii. Select "no-Show" in the Appointment Status field.
  - iv. Click the "Save Changes" button.

OR

- i. Complete the Vision on-line form, scan and upload the handwritten data collection form, generate and finalize the customer's work order in Audit Tracker, and save the customer's status as "Complete" in the BGE Scheduler.

- ii. Vision on-line form – the on-line entry website is:  
<http://client.aegonline.com/login>  
Username: tthomas  
Password: Tthomas10 (case sensitive)

Attached at the end of this document are the detailed instructions for completing the Vision data entry and scan upload.

**IMPORTANT: Be sure to**

1. **Enter “Audit” as part of the equipment installed.**
  2. **Assign Efficient Home as the contractor, assign the customer address for both the Primary and Premise Contacts, and set the application status to “Review” when complete. If there is no contact listed for Primary or Premise, you will need to create a new contact.**
    - a. **Open the Primary Contact popup.**
    - b. **Enter the customer account number and click the CIS button**
    - c. **Click on the icon to populate the Primary Contact**
    - d. **Select Primary as the contact type, and name it CIS Data**
    - e. **Save the contact, then assign it for the Premise Contact as well.**
  3. **Make sure that all relevant information is completed on the handwritten form, including the percentage of existing CFL’s, an assigned priority number for each section, and the type AND quantity of each improvement installed.**
  4. **The “Lighting and Appliance Program” should ALWAYS be checked as a recommended program.**
  5. **When all is complete, save the entry status as “Review”.**
- iii. AuditTracker work order – the Web-based version of AuditTracker can be accessed at <https://at.efficienthomellc.com/>.
1. You will be required to enter your network username and password. Usernames should be entered as “efficienthome\<username>”, where <username> is your username.
  2. Click the AuditTracker link. You must also separately log into the AuditTracker system. Contact the system administrator if you need assistance getting to the AuditTracker page.
  3. Select the customer name from the pull-down list. If there is a “Start Work Order” button, click it.
  4. Add each item separately by selecting the item from the list, specify “Efficient Home” as the subcontractor, and enter the quantity. Click the “Add” button.
  5. **Once the work order is completed, place the current date in the “Post-Processing Complete” field, verify and check the checklist items, and click the “Save Changes” button.**

The work order should be entered to match the equipment and improvements entered in the Vision entry form.

- iv. Update BGE Scheduler - [www.bgesmartenergy.com](http://www.bgesmartenergy.com) , click “Partner Login” at the upper right, username “efficienthome”, password “Efficient1!”.
1. Click “Appointment List” at the lower left.
  2. Click the “Show Only Items Where” link to narrow the list. The customer’s account number is likely to be the best single filter.
  3. Locate the customer, and save the appointment as “Completed”. If the existing status is still “Tentative”, you will need to save the appointment first as “Confirmed”, then “Completed”.

- c. *QHEC Supplies* – Each QHEC Auditor is responsible for maintaining an adequate supply of the improvement measures offered by the program, including:
- i. 60w, 75w, and 100w equivalent CFL bulbs
  - ii. Low Flow Showerheads (both white and chrome)
  - iii. Low Flow Aerators
  - iv. DHW Pipe Insulation, both ½” and ¾” diameter
  - v. DHW Tank Insulation Blanket
  - vi. Smart Strips

The supplier for the materials is:

AM Conservation Group  
John Bailes, Account Manager  
Phone: (800) 777-5655 ext 22  
FAX: (843) 971-1472  
Email: [jbailes@amconservationgroup.com](mailto:jbailes@amconservationgroup.com)

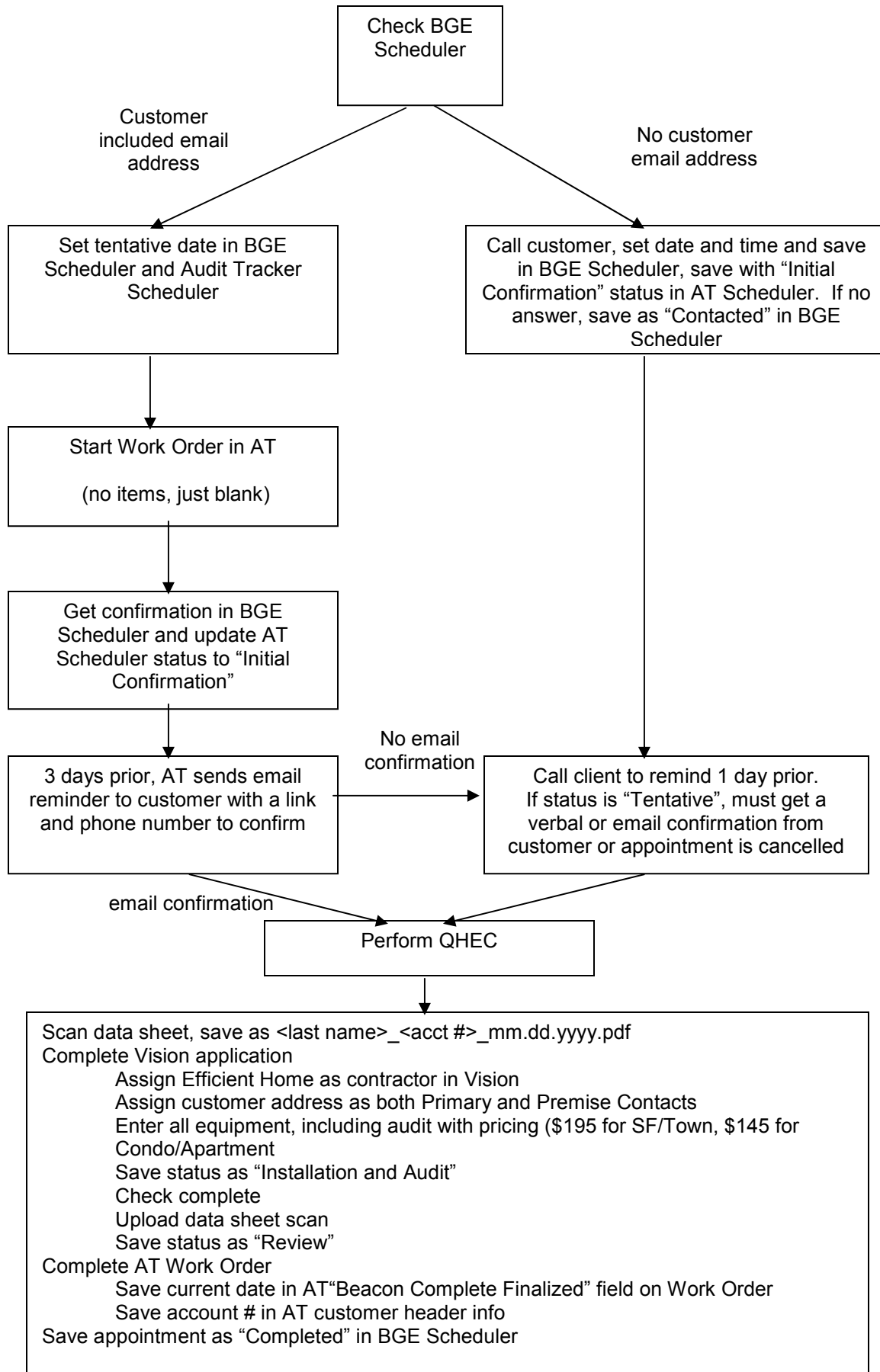
The order form can be downloaded from the Intranet ([at.efficienthomellc.com](http://at.efficienthomellc.com)) under “Publications”.

Orders may be placed via phone, FAX, or email. The materials can be drop-shipped to the auditor's home if desired, or shipped to the storage shed at

15221 Dino Drive, #2045  
Burtonsville, 20866

Make sure to specify the shipping address (storage or drop ship location) when placing the order.

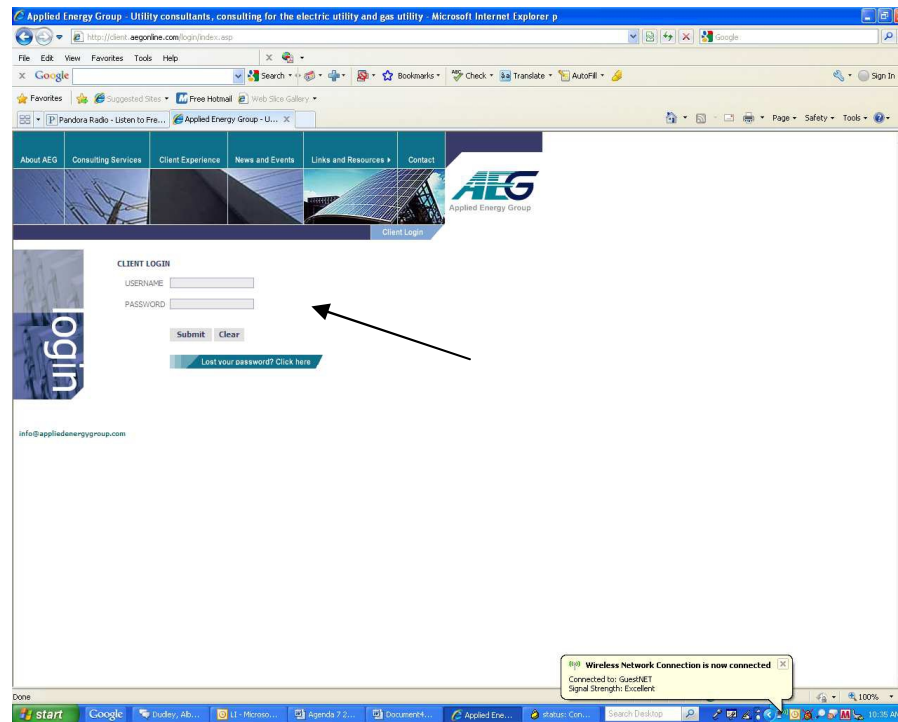
## BGE QHEC Workflow



# Logging into Vision

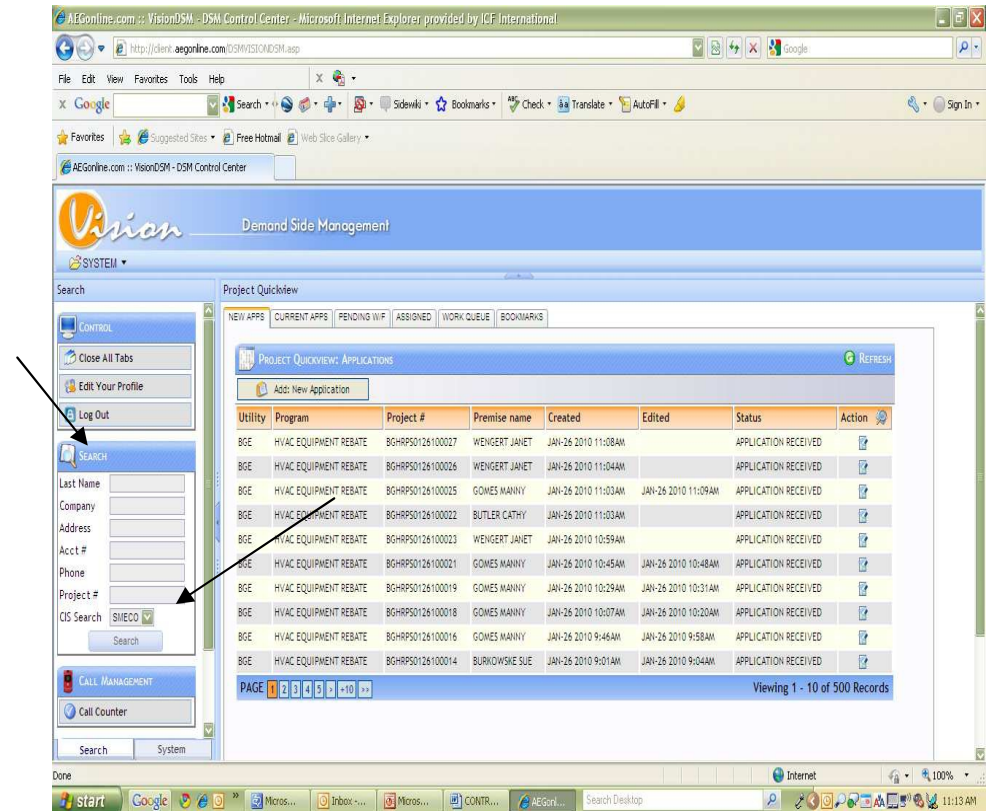
The Vision home page is located at <http://client.aegonline.com/login/index.asp>

Once the page opens you will be prompted to enter your username and password and click **SUBMIT**




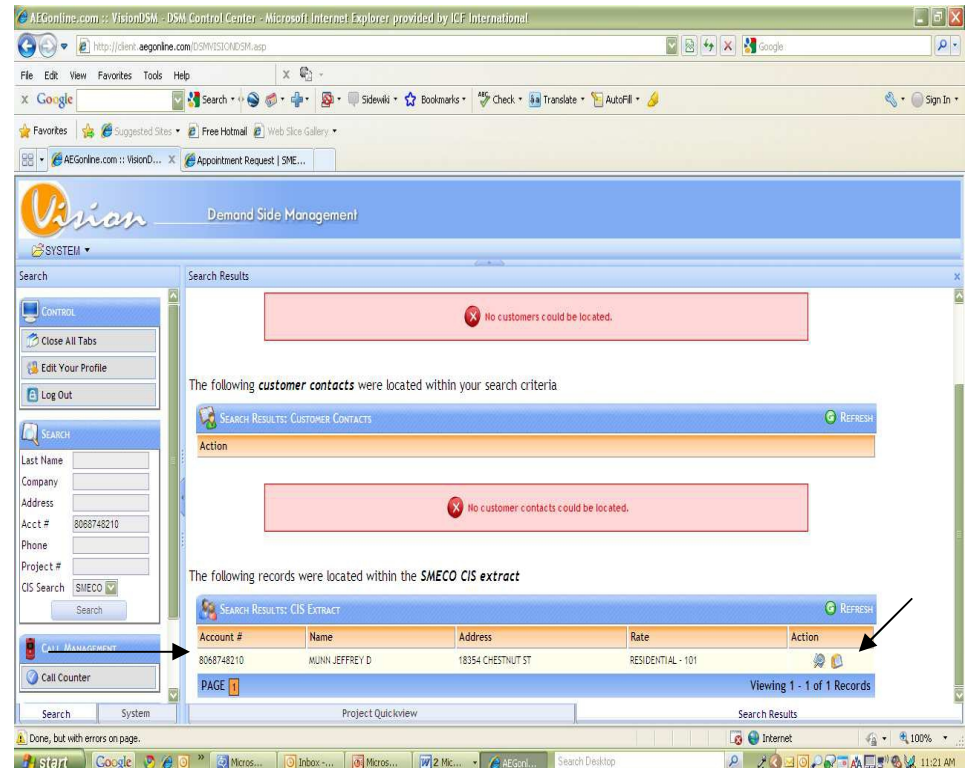
# Searching for Customers in Vision

- In order to enter customers into Vision you must have the account number through SMECO. This information is found by using the Vision search function.
- If the account number is unavailable, the customer can be found by their last name, address and/or phone number. The **SEARCH TAB** can be found at the bottom left hand corner of any page in Vision.
- Click the **SEARCH TAB**; you will have the option of entering the Customer's last name, address, account number, phone number or any variation thereof.
- Make sure the **CIS SEARCH** box is marked **SMECO** and click **SEARCH**



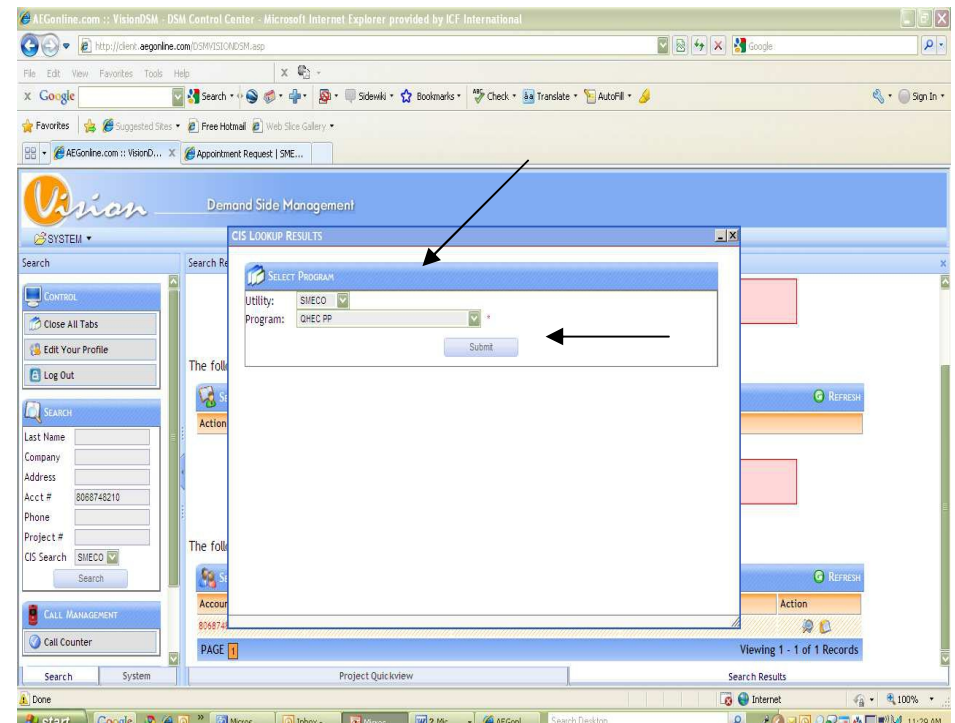
# Searching for Customs cont.

1. Scroll down to the bottom of the **SEARCH RESULTS** screen and the CIS record will be displayed
2. Ensure you have pulled up the correct customer and click the 



# Creating a new Customer Application in Vision

1. At this point the **CIS LOOKUP RESULTS** box will appear
2. Select **SMECO** as the **Utility** and **QHEC PP** as the **Program**
3. Hit **SUBMIT**





# Creating a new Customer Application in Vision cont...

4. The **ADD NEW APPLICATION** window will open and you must enter the information off of the paper QHEC checklist into the electronic application
- 5. After entering all of the information required for the application click **SUBMIT**.

The screenshot shows the Vision DSM Control Center web application. The main content area displays search results for customer accounts. A 'QHEC APPLICATION' window is open, showing a form for customer information. The form includes fields for Name, Appointment Requestor First Name, Appointment Requestor Last Name, Type of service, QHEC Analyst, QHEC Date, House Type, House Square Footage, Approx. Year Built, Number of Occupants, and Own or Rent. A red background highlights the 'QHEC APPLICATION' title and a note: 'Fields with a red background represent an administrative field not shown on the public application'.

# The Electronic Application

AEOnline.com :: VisionDSM - DSM Control Center - Microsoft Internet Explorer provided by ICF International

http://client.aegonline.com/DSMVISIONDSM.asp

File Edit View Favorites Tools Help

Google Search

AEOnline.com :: VisionDSM - DSM Control Center

**ADD NEW APPLICATION**

**QHEC APPLICATION**

Fields with a red background represent an administrative field not shown on the public application

**CUSTOMER INFORMATION**

Please enter the following information:

Appointment Requestor First Name	<input type="text"/>
Appointment Requestor Last Name	<input type="text"/>
Type of service:	-Select-
QHEC Analyst:	-Select-
QHEC Date:	<input type="text"/>
House Type:	-Select-
House Square Footage:	<input type="text"/>
Approx. Year Built:	-Select-
Number of Occupants:	<input type="text"/>
Own or Rent:	-Select-
Residence Type:	-Select-

**HVAC AND WATER HEATING EQUIPMENT**

**FINDINGS ON EXISTING EQUIPMENT**

**HEATING SYSTEM**

Main heating system fuel:	-Select-
Main heating system type:	-Select-
Estimated system efficiency:	<input type="text"/>
Manufacture Date:	-Select-
System condition:	-Select-
2nd heating system fuel:	-Select-
2nd heating system type:	-Select-
Estimated 2nd system efficiency:	<input type="text"/>
2nd System Manufacture Date:	-Select-
2nd system condition:	-Select-

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# The Electronic Application Cont...

AEOnline.com :: VisionDSM - DSM Control Center - Microsoft Internet Explorer provided by ICF International

http://client.aegonline.com/DSMVISIONDSM.asp

File Edit View Favorites Tools Help

Google Search

AEOnline.com :: VisionDSM - DSM Control Center

**ADD NEW APPLICATION**

Main cooling system is:

Estimated system efficiency is:

Manufacture Date:

Cooling system condition:

2nd cooling system is:

Estimated 2nd system efficiency is:

2nd System Manufacture Date:

2nd cooling system condition:

**WATER HEATING SYSTEM**

Water heating system fuel:

Water heating system type:

Estimated efficiency is:

Manufacture Date:

System condition:

Temp. setting:

Efficient-flow showerheads present:

**LIGHTING AND APPLIANCES**

**FINDINGS ON EXISTING CONDITIONS**

High-use lighting: Percentage of CFL's (%):

All lighting: Percentage of CFL's (%):

Other baseload opportunities:

**RECOMMENDATIONS FOR IMPROVEMENTS**

Participate in 2nd Refrigerator Turn-in Program?

**HEALTH, SAFETY, AND DURABILITY**

**RECOMMENDATIONS FOR IMPROVEMENTS**

Recommend Comprehensive Energy:

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# The Electronic Application Cont...

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http://client.aegonline.com/DSMVISIONDSM.asp

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**ADD NEW APPLICATION**

**LIGHTING AND APPLIANCES**

FINDINGS ON EXISTING CONDITIONS

High-use lighting: Percentage of CFL's (%):

All lighting: Percentage of CFL's (%):

Other baseload opportunities:

RECOMMENDATIONS FOR IMPROVEMENTS

Participate in 2nd Refrigerator Turn-in Program?

**HEALTH, SAFETY, AND DURABILITY**

RECOMMENDATIONS FOR IMPROVEMENTS

Recommend Comprehensive Energy Audit through Home Performance with ENERGY STAR Program?

**RECOMMENDATIONS AND DIRECT INSTALL SUMMARY**

Based on the Quick Home Energy Check-up, it is recommended that you participate in one, or a multiple of the following programs:

☐ Lighting and Appliance Program

☐ HVAC Rebate Program

☐ Home Performance with ENERGY STAR or Limited Income Energy Efficiency Program

☐ PeakRewards Program

QHEC Fee:

MISSING INFORMATION FOR LETTERS:

Submit Cancel

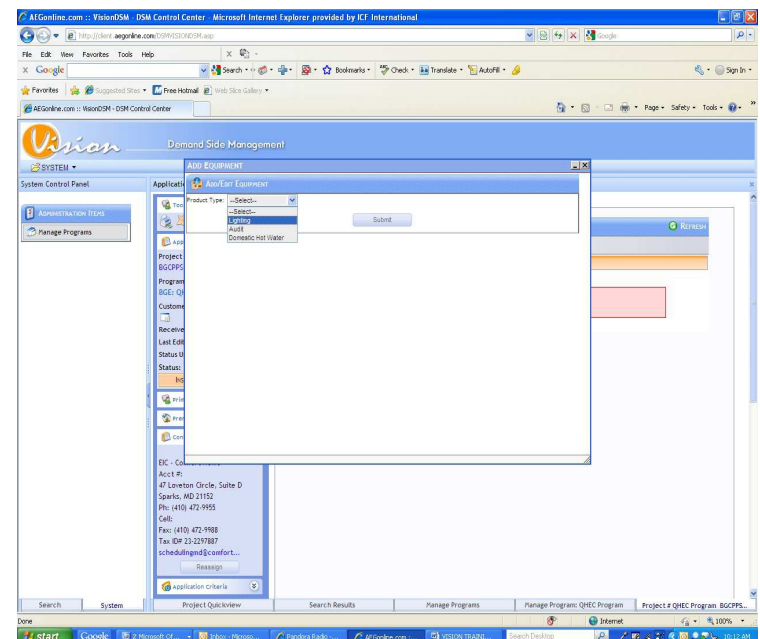
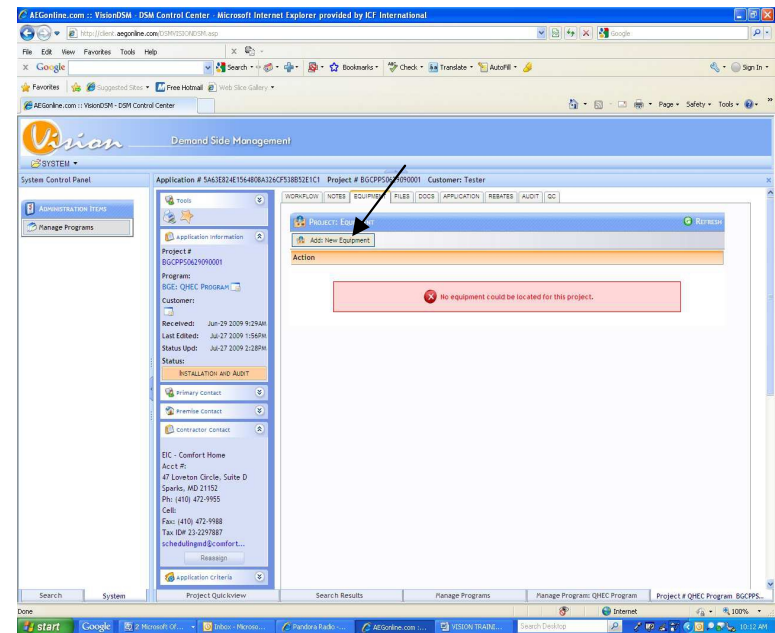
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# Adding Newly Installed Measures to the record

1. After creating the application in Vision click the **EQUIPMENT TAB** and the ADD EQUIPMET window will open
2. Click the ADD NEW EQUIPMENT BUTTON and select the type of equipment that was installed. Each measure must be added to the customer record separately.



# Adding Newly Installed Measures to the record cont..

3. After selecting the equipment that was installed, verify that all of the information is correct (quantity, type, water heating type, house type) and click **SUBMIT**

4. The installed equipment will be displayed. Confirm the correct measures were selected.

Application # F82F00CD645B4AF2A7DC85D0BF28 Project # QHEC PP Customer: SMQHP50127100001

Project # SMQHP50127100001

Program: SNECO QHEC PP

Customer: Phil Austen

Received: Jan-27-2010 10:28AM

Last Edited: Jan-27-2010 11:21AM

Status: Lead

Primary Contact: [Select]

Premise Contact: [Select]

Contractor Contact: [Select]

Application Criteria: [Select]

**ADD EQUIPMENT**

Project Type: Lighting

Category: FluorescentCFL

Product: 14-Watt Integral CFL - 2 CFLs

ELEC UTIL CUST	2.5	KWH NONSUMMER PEAK ADJUSTED	0
INCENTIVE	0.1	KWH NONSUMMER PEAK UNADJUSTED	0
EQUIPMENT COST	2.19	KWH SUMMER OFFPEAK ADJUSTED	0
INSTALLED COST	0.011	KWH SUMMER OFFPEAK UNADJUSTED	0
KW IMPACT	0	KWH SUMMER PEAK ADJUSTED	5
KW PJM PEAK ADJUSTED	0.009	KWH SUMMER PEAK UNADJUSTED	0
KW PJM PEAK UNADJUSTED	0	KWH SUMMER PEAK UNADJUSTED	0
KW SUMMER GROSS	0	KWH SUMMER PEAK UNADJUSTED	0
KW SUMMER NET	0	MEASURE LIFE	9
KWH IMPACT	23	NAME	14-Watt Integral CFL - 2 CFLs
KWH NONSUMMER OFFPEAK ADJUSTED	0	QUANTITY	2
KWH NONSUMMER OFFPEAK UNADJUSTED	0	WATTAGE	14

**SUBMIT**

Application # F82F00CD645B4AF2A7DC85D0BF28 Project # QHEC PP Customer: SMQHP50127100001

Project # SMQHP50127100001

Program: SNECO QHEC PP

Customer: Phil Austen

Received: Jan-27-2010 10:28AM

Last Edited: Jan-27-2010 11:21AM

Status: Lead

Primary Contact: [Select]

Premise Contact: [Select]

Contractor Contact: [Select]

Application Criteria: [Select]

**PROJECT: EQUIPMENT**

Category: Lighting

Product type: FluorescentCFL

Name: 14WATT INTEGRAL CFL - 2 CFLs

Quantity: 2

Entered: JAN-27-2010

Action: [Edit] [Delete]

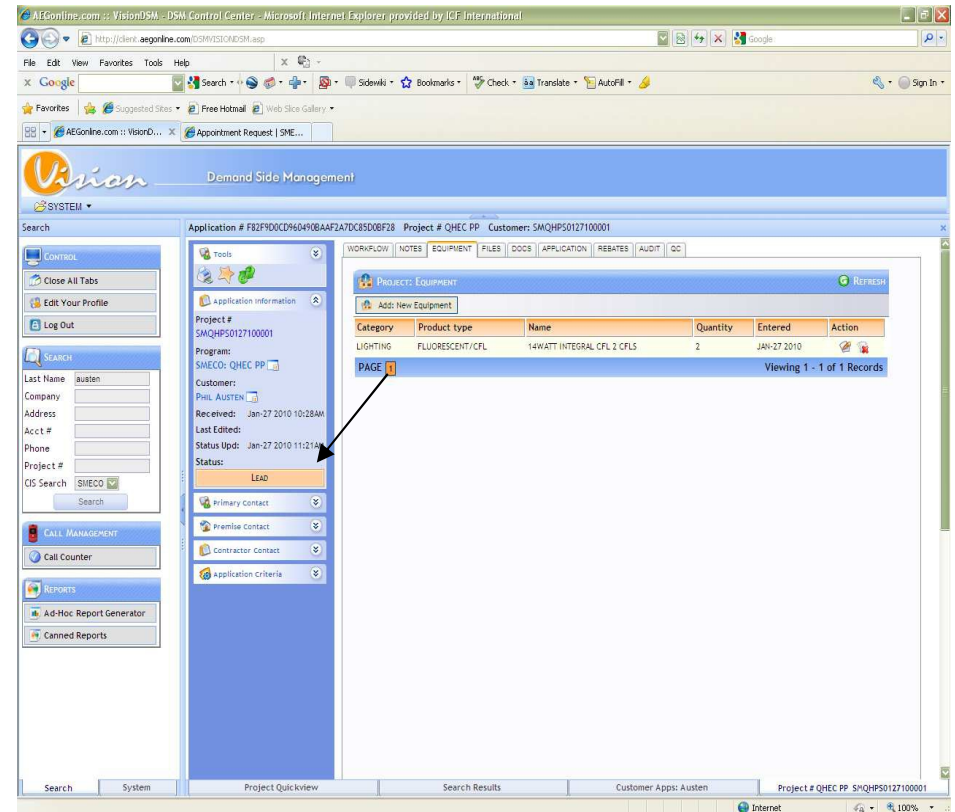
PAGE 1 Viewing 1 - 1 of 1 Records



# Uploading the Checklist onto the Customer record

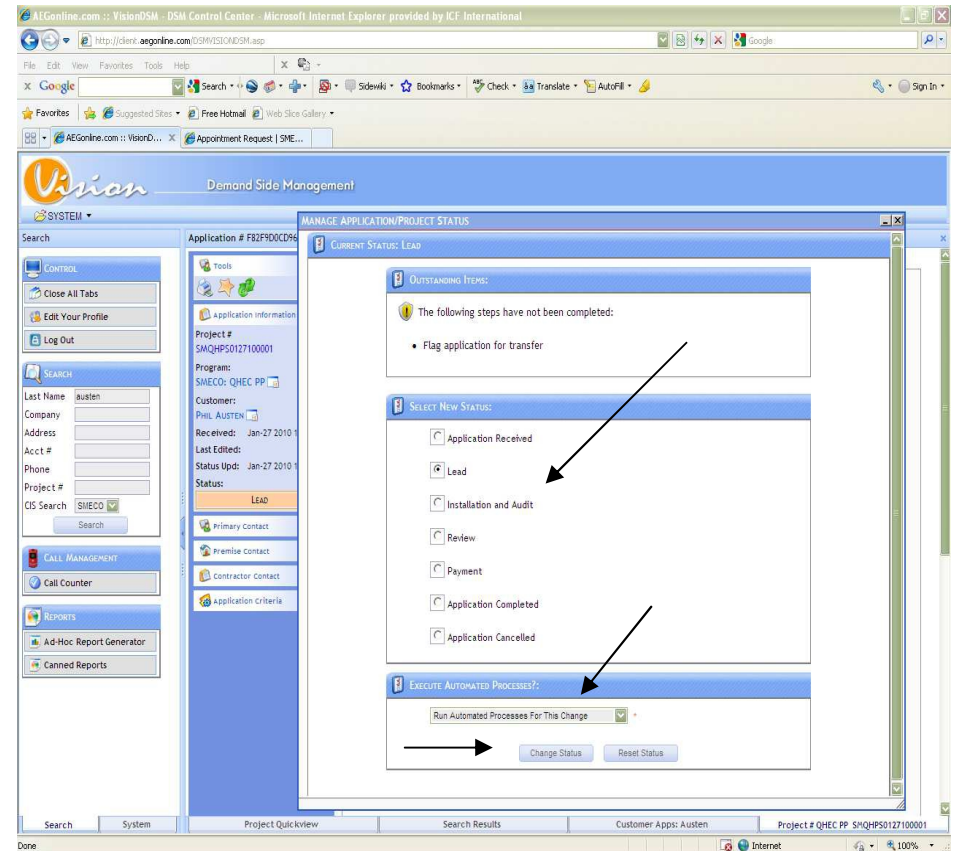
After the application has been successfully completed and the equipment has been selected, a copy of the physical checklist should be uploaded to the customer record. The file should be saved in lastname\_account #\_date (xx.xx.xxxx) format.

1. In order to upload the file you must go back to the main QHEC screen and select the **ORANGE STATUS BUTTON**




# Uploading the Checklist onto the Customer record cont...

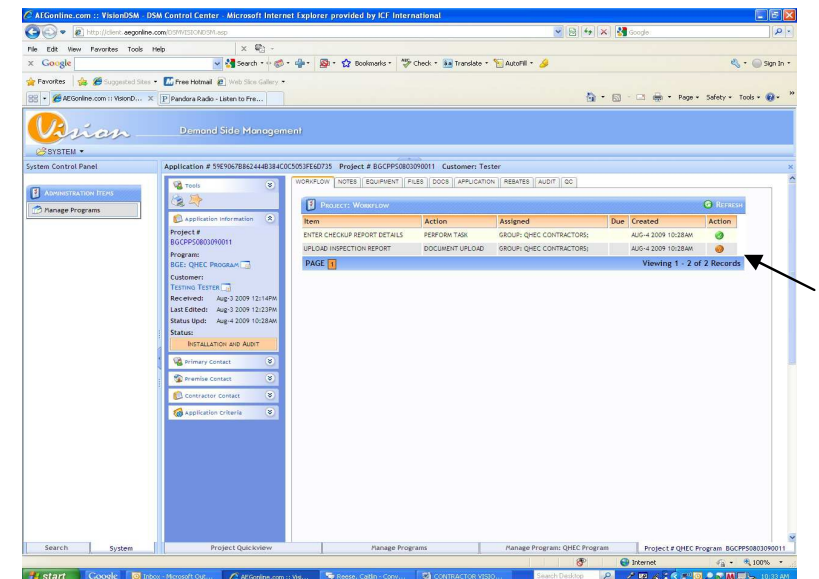
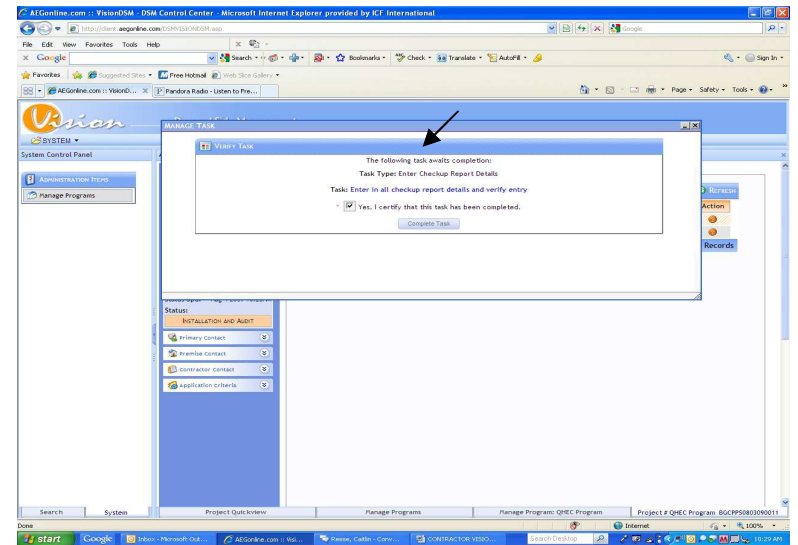
1. Change the record's status from **LEAD** to **INSTALLATION AND AUDIT**, select **Run Automated Process for the Change** and hit **CHANGE STATUS**





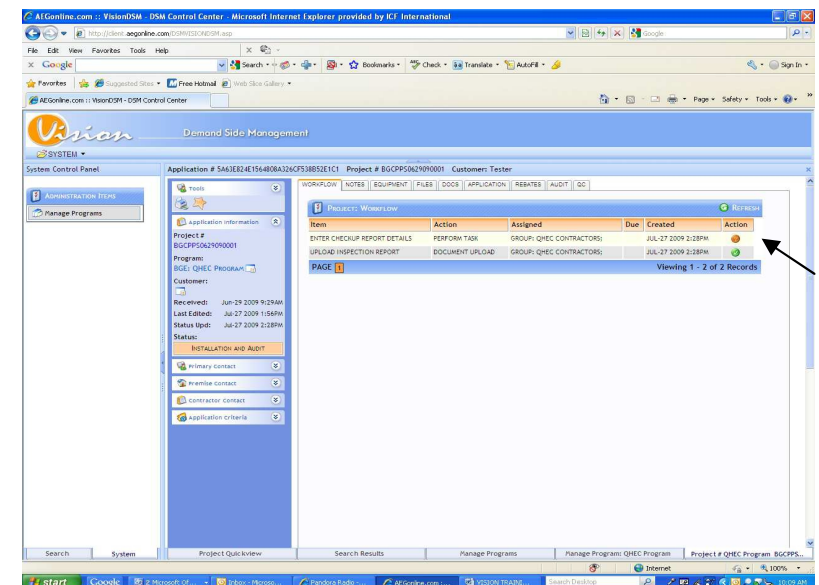
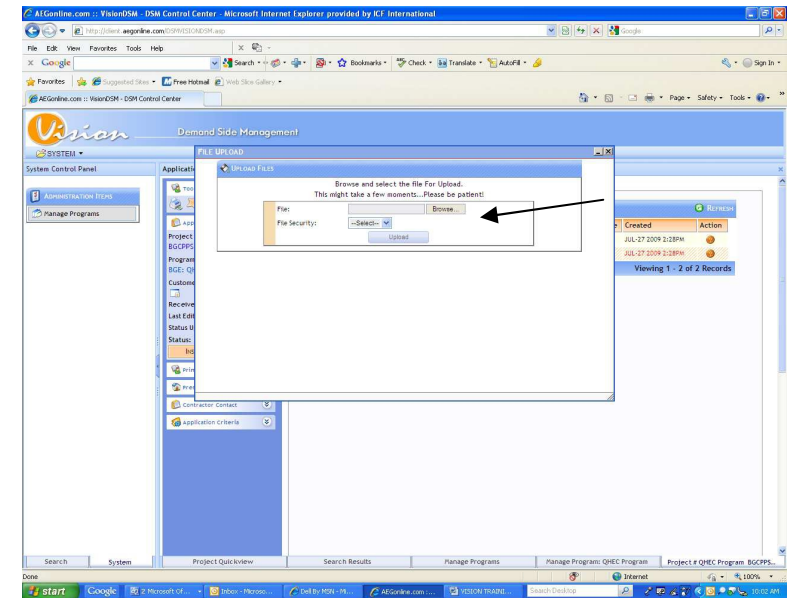
# Uploading the Checklist onto the Customer record cont...

2. You will automatically receive the message below, click **OK** to proceed
3. After clicking ok, you will be automatically directed to the **WORKFLOW TAB**, select the top **ACTION**  button **ENTER CHECKUP REPORT DETAILS**



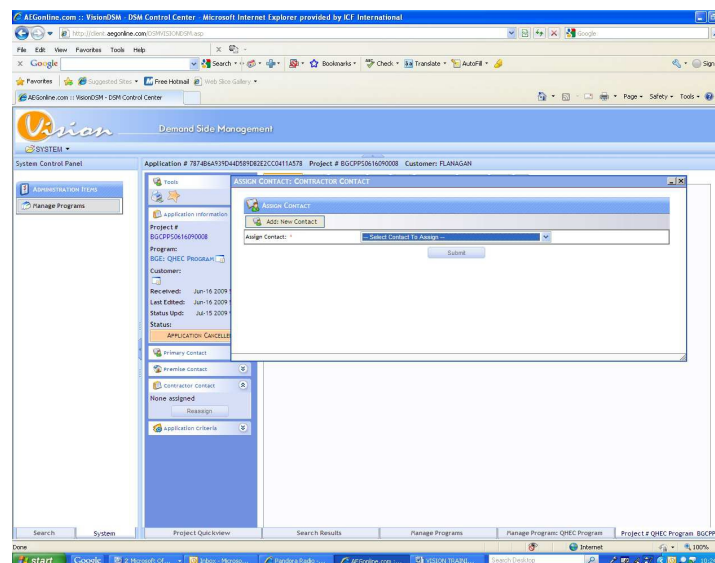
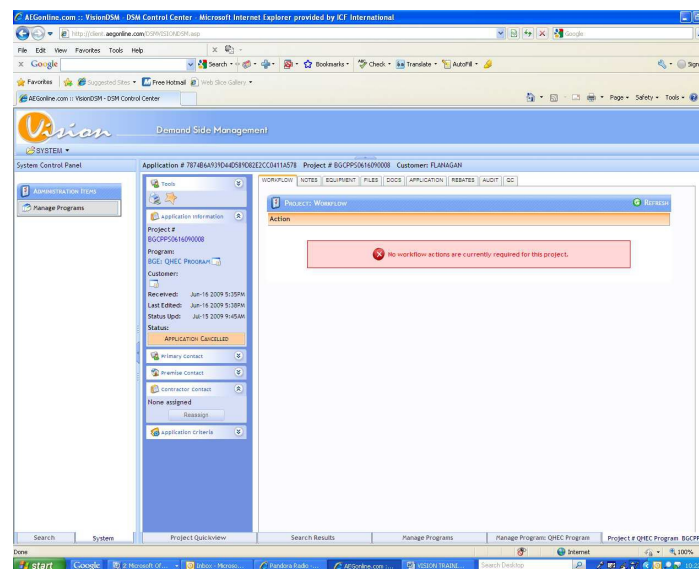
# Uploading the Checklist onto the Customer record cont...

4. Once the Upload File box opens, select the file you want to upload by using the Browse button. Make sure the **FILE SECURITY** is marked **PRIVATE** and select upload.
5. If the file is properly uploaded, the **ACTION** button will turn from an orange question mark to a green checkmark



# Selecting the Contractor Contact

1. Click the **CONTRACTOR CONTACT** box and click **REASSIGN**
2. Select the organization that completed the QHEC and hit **SUBMIT**



# Q & A

Thank you for your time, at this point we  
take any questions you may have