

Formyoula Training

March 4, 2021

Agenda

1. Welcome, introductions, overview
2. Offline set-up, accessing client records and working offline
3. Key steps for energy modeling - using OptiMiser
(Recommended Upgrades page in report)
 - a. Viewing/entering utility usage history
 - b. Upgrading lighting to LEDs
 - c. Recommend a fuel switch to a heat pump
4. Modifying estimated costs
5. Best Practices
6. Troubleshooting common issues with Formyoula or the report



Offline Set-up

Accessing client records
Working offline



Formyoula - App Store

On a regular basis, be sure to install the latest version of the Formyoula app from the App Store.

As of February 2021, the current version is v4.4.8

We also recommend a fresh install (as opposed to an update) as Formyoula Mobile Forms version 4 runs on a newer engine.

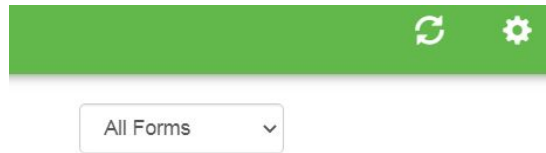
Before uninstalling the app, be sure all your current data has been saved and submitted to Salesforce.

System update minimums:

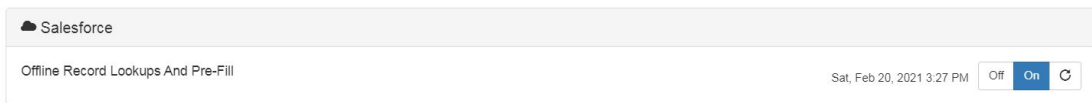
Android 9 IOS version 11

Offline Lookups - Set-up

Click on the settings icon (upper right corner of Forms page):



Turn On Offline Record Look-ups and Pre-Fill:



Be sure to do this when connected to wifi and well in advance of your field visit as it needs time to sync the records for offline look-up.

Before each assessment visit, we recommend that you pre-populate your form while still online to capture homeowner enrollment information.

Accessing client records

Click on the pencil to bring up a client record



Regardless of whether you have been working in the client record or are pulling it up for the first time, best practice is to always open records through a "fresh pull" rather than using Recent Entries.

Don't ever open recent entries!

Look up the customer name and be sure to select the assigned assessment:

Working Offline - common questions

I am out of cell range and can't access wifi.

How do I access a client's form?

So long as you have activated the offline look-up, you should be able to access a client's form while offline.

Can I use the Formyoula app on my smart phone rather than an iPad or tablet?

Yes! In fact it maybe easier to take and save photos from your phone.

The app is often crashing on me.

Please be sure you have installed the latest version, updated your operating software and have adequate storage available.

Working Offline - common questions

Why am I losing information when entering data offline?

This is likely to occur if you

- open a record through recent entries rather than opening a new form and/or
- have submitted the form while offline and try to open it again before you have returned online and given it a chance to submit the data to ESC's Salesforce database.

Once you press submit, wait until you are online to access the record again. Then always perform a new customer search when returning to update the information.

Key steps for Energy Modeling

What is OptiMiser?
Entering Utility Usage
Lighting Upgrades
Beneficial Electrification

OptiMiser - FAQs

What is OptiMiser and how does it relate to the assessment?

OM is a professional energy audit software with over 4,000 inputs. We utilize the software to generate estimated costs and savings for a few specific measures.

How accurate is OptiMiser for modeling energy savings and improvement costs?

In most situations, we've found that OM will provide a good idea of potential energy savings. The model is only as accurate as the information that you input.

Is it localized to region, elevation, etc.?

Yes, OM uses HDD data related the household's zip code.

OptiMiser - Recommended Upgrades



Recommended Upgrades

Your Energy Smart Analyst:
Charles Cady
(970) 379-2961



YOUR LOCAL ENERGY EFFICIENCY PARTNERS

When your Analyst performed your Home Energy Assessment, information was collected to estimate annual energy savings on projects you might consider completing to save money on your energy bills. Below is a breakdown of those suggested improvements, the estimated costs and potential annual savings, which were calculated through software modeling. A Savings to Investment Ratio (SIR) of 1 or greater means that the resulting energy savings will pay for the cost of the project.

Energy Detail (estimated)	Existing Home	Improved Home	Units
Annual energy consumption	183.3	162.5	MMBTU
Annual electrical consumption	22,544	21,554	kWh
Annual gas consumption	1,064	890	THERMS
PV system size to reach net zero energy (estimated)	44.8	39.7	KW
PV system cost (estimated)	111,923	99,235	\$

Recommended Improvement	Estimated Cost	Estimated Annual Savings	SIR
Replace incandescent lights with CFLs or LEDs to save energy and replacement costs.	\$115	\$73	4.5
Improve heating system 1	\$3,318	\$254	1.1
Improve water heater 1	\$1,006	\$69	0.9
Add storm windows or install new windows to save energy and increase comfort.	\$12,391	\$75	0.1

Recommended Upgrades



How does OptiMiser decide which improvements to list?

OptiMiser scans for **current** and **recommended conditions**:

Water Heating System EF *	0.7
Water Heating System Recommended EF	-- None --

If recommended elements are left blank (as above), improvements are not modeled or recommended as upgrades.

Recommended actions (text description) help contractors and homeowners understand the issue, but populating the current and recommended numbers trigger the savings calculations.

Entering Utility Usage History - FAQs

Do I need to enter usage from oldest to newest?

The order you enter the bills does not matter.

Can the utility usage history bar graph in the report show the utility usage history from oldest to newest?

Not at this time – this has to do with the way our database needs to pull in only the 12 newest records.

Will the modeling work if energy usage history is not entered?

Yes – but the model will be more accurate if you have utility history entered before you run the energy model. If you add history at a later date, be sure to resubmit the energy model.

Entering Utility Usage History - FAQs

How should I enter propane usage history?

Enter gallons of propane as therms for each fill.

Then enter the remaining months (entering a dummy date for each month) as “0” usage (blank won’t work) so the Annual Gas Usage can be calculated, as the process requires 12 months of bills.

Lighting Recommendations

How do I recommend a switch to all LEDs?

Count and indicate the number of incandescents in the home:

Number of
Incandescent/Halogen
Lamps

50

OptiMiser models replacing all (above) incandescents with LEDs:

Recommended Improvement	Estimated Cost	Estimated Annual Savings	SIR
Replace incandescent lights with CFLs or LEDs to save energy and replacement costs.	\$250	\$201	5.6
Reduce air leaks and weatherstrip doors to save energy and increase comfort.	\$641	\$110	2.6
Increase attic insulation and coverage to save energy and increase comfort.	\$1,187	\$19	0.3

Beneficial Electrification Recommendations

How do I recommend a fuel switch to a heat pump?

HSPF inputs have been added for heat pumps (existing and recommended.)

To recommend a heating fuel switch from natural gas or propane to an electric air source heat pump,

- Enter a HSPF value <25 on **Heating System AFUE Recommended**
- If left blank, Cooling System Rec will be populated with 20 by default for heat pump conversions

This information is also found in the help text on the heating/cooling page

Beneficial Electrification Recommendations

How do I recommend a fuel switch to an electric hot water heater?

To recommend a hot water heating fuel switch from natural gas or propane to an electric hot water heater, enter an EF >1 on **Water Heating System Recommended EF**

This entry will cause the recommended system to be switched to an electric heat pump water heater.

This information is also found in the help text on the water heating page

Modifying Estimated Costs

Recommended Upgrades
Energy Usage

Preview Report - Recommended Upgrades



Recommended Upgrades

Your Energy Smart Analyst:
Cameron Millard
(720) 940-6900



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Energy Detail (estimated)	Existing Home	Improved Home	Units
Annual energy consumption	108.9	54.9	MMBTU
Annual electrical consumption	3,779	3,749	kWh
Annual gas consumption	960	421	THERMS
PV system size to reach net zero energy (estimated)			KW
PV system cost (estimated)			\$

Recommended Improvement	Estimated Cost	Estimated Annual Savings	SIR
Warm your crawl space to save energy and increase comfort.	\$2,274	\$849	7.5
Reduce air leaks and weatherstrip doors to save energy and increase comfort.	\$763	\$86	1.7
Increase attic insulation and coverage to save energy and increase comfort.	\$2,826	\$85	0.6
Add storm windows or install new windows to save energy and increase comfort.	\$5,691	\$70	0.2

Formyoula - Modifying Estimated Costs



You may modify the default costs for projects that OptiMiser has modeled. To activate, submit an assessment as "Preview Report" with full recommendations to trigger the OptiMiser model.

After you have received the preview report by email, return to open the customer record (remember "fresh pull"), then click this field to connect to the OptiMiser Model for this home:

Q NEW - Modify OptiMiser Costs

When you click this button, you should see the RA - # populate:

Select Project - *Only visible after energy model is complete!

Click on the RA - #:

RA - 12608
12543.12

Formyoula - Modifying Estimated Costs

Click Select Measure:

 Update Recommended Project Costs

Click on each recommendation that you'd like to modify (the number referenced at the top is OptiMiser's estimated cost.)
We recommend rounding up to a whole number.

Recommendation

353.25	Increase attic insulation and coverage to save energy and increase comfort. Attic2Only
3334.5	Improve vault or flat roof insulation to save energy and increase comfort. Ceiling
7040.6	Improve heating system 1 HeatingSystem1

Formyoula - Modifying Estimated Costs

Once you modify the estimated costs, be sure the "Update Energy Model" box (found on the invoice page) is NOT checked.

Show/hide help for this page ☐

Show estimated energy savings page in report ☒

Update Energy Model ☐

Otherwise the costs you just modified will default back to the original estimates!

Best Practices

Data Entry
Help text
Report Writing

Best Practices

- Install the latest version of the Formyoula app
- Ensure adequate storage space on device
- Confirm software is updated to these minimum software versions
 - Android 9
 - IOS version 11
- Access Formyoula on computer through Google Chrome
- Refer to each page's help text to answer your questions
- Work on written report as soon as possible, allowing ample time to complete

Best Practices - data entry

- Pre-load household info while online
- Consider using voice text or written notes to capture your thoughts during the assessment
- Review and improve data entry on a computer
- Use additional photo page to emphasize issues/opportunities
 - Air leakage photos
- Preview report and review the emailed report before moving to assessment complete
 - Return to Formyoula to make adjustments to the data and correct any typos found in the report
 - Modify estimated costs on recommended upgrades
 - Submit to see your changes emailed to you in a new report
 - This can be done multiple times in “preview report”

Best Practices - Use the Help text

At the top of each page, guidance is provided for the information requested on that page. This help text is updated regularly as we improve the tool so we encourage you to check the box often and review any new information...

Show/hide help for
this page

☐

Show/hide help for
this page



NEW button - for 2020/21 - Modify OptiMiser Costs: You may now modify the default costs for upgrade per Report" assessment with your recommendations before an OptiMiser model will be built. After you have data for this home. Then, select the recommendations that you wish to review or modify.

"If you do not see a recommendation you have made, first ensure you have entered the correct inputs for the Next, navigate to the Invoice page and check the "Update Energy Model" box near the top of the page.

Ensure the Assessment Stage is set to "Preview Report", then click "Submit".

Wait at least 5 minutes before returning to the app and performing a fresh search for the updated assessment

Once you have updated your recommendations (be sure to hit the green button to save for each measure!), n to "Preview Report" until you are satisfied with the emailed copy that is sent to you.

Please note: It is critical that you wait at least 5 minutes before returning to Formyoula and always perform a

Best Practices - Report writing

This report is a living document and may be referenced by the homeowner, ESC's energy advisor, a retrofit contractor, or their utility company, many weeks, months or years after your conversation with them in their home.

Be sure to put in writing any information you shared with the homeowner during your visit and be as specific as possible with your recommendations. This information will help a potential contractor complete the work that you have recommended.

Use language that the homeowner can understand, address problems the homeowner has expressed, and offer solutions that address root causes and that are practical and appreciate for the home.

Best Practices - Assessment Overview

Last year, we replaced the three priority actions with Assessment Overview. This is your opportunity to provide background on the home, recognize the issues of concern as indicated by the customer prior to your visit and highlight your recommendations. You have a good paragraph of space and we encourage you to provide a solid overview of your visit, findings, and recommendations, referencing the pages that follow.

Ideally, the homeowner can clearly understand this introductory paragraph and have a big picture view about the state of their home's energy efficiency.

Assessment Overview *

Hi Andrea,

Thanks again for having me out to do your energy assessment. Your home is generally in good shape but needs some air sealing to reduce heat loss through the gaps and cracks between the logs and ceiling. This uncontrolled air leakage is likely responsible for your high electric heating bills. Your electric thermal storage heating system could be commissioned for better function or even use a heat-pump add-on offered by the manufacturer. After making these upgrades, consider a photovoltaic solar system to cover any of your remaining electric use. You have great southern exposure for a roof or ground-mounted system.

Sample Language - Assessment Overview

The Assessment overview can also be used to draw attention to the best improvement opportunities or even a major health and safety concern. For the analyst, the assessment overview is your best place to communicate what *you think* is needed for the home. **Homeowners are more likely to read the assessment overview than any other page in the report.** You can catch their attention by addressing their concerns.

Assessment overview:

This home is reasonably well-built but has a poorly defined thermal boundary in the crawlspace. This area should be prioritized for improvement, as there is a great deal of heat loss into the space. The home has a high rate of air leakage, which could be repaired to improve comfort and efficiency. The attic insulation has some defects and could be brought up to a better R-value. I did find a gas leak in the hard pipe in the crawl, and marked it with foil tape. You should consider photovoltaic solar panels after you've established your electrical consumption history. You can reduce plug loads like the heat tape by putting it on a timer. You may also want to upgrade to a Level 2 charger for faster and more efficient electric vehicle charging.

Your

Preview Report - Assessment Overview



YOUR LOCAL ENERGY EFFICIENCY PARTNERS

Home Energy Assessment

Your Energy Smart Analyst:
Cameron Millard
(720) 940-6900

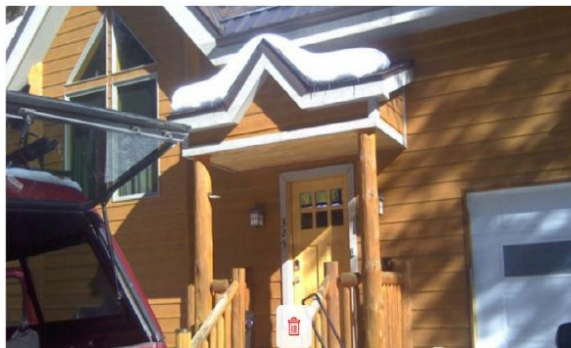


Welcome to Energy Smart!

You have taken the first step to improving the comfort, safety, and efficiency of your home. The following report details the findings from the Home Energy Assessment on January 12, 2021.

Call your local Energy Smart Colorado Resource Center with any questions or to discover available rebates that can help make these recommendations a reality.

Building type: Single Family
Year built: 2005
Square footage: 1,850
Primary heating fuel: Propane
Number of bedrooms: 2
Number of occupants: 2



Assessment overview:

Hi Casey,

Thank you for allowing me to conduct an energy assessment of your home. I hope you find these recommendations useful as you make improvements to the comfort, durability, and efficiency of your home. You let me know that your top priority is fixing the ice damming on your roof. The ice dams are most likely caused by heat loss from air leaks through gaps and cracks in your ceiling. Please see the Air Sealing page for more information. Besides air leakage, your home could benefit from LED lighting, crawlspace improvements, and an upgraded heating system. Details about these areas and recommended improvements are detailed in their respective sections of the report. Do not hesitate to contact me with any questions you may.

-Cameron Millard, Building Analyst Professional

Your utility provider(s):



Preview Report - Energy Usage



Energy Usage

Your Energy Smart Analyst:
Charles Cady
(970) 379-2961



YOUR LOCAL ENERGY EFFICIENCY PARTNERS

Electric utility provider:

Holy Cross Energy

Electric account #: 500300102

Electricity cost per kWh: **\$0.10**

Annual electric usage: **13,148 kWh**

Annual electric cost: **\$1,315**

Gas utility provider:

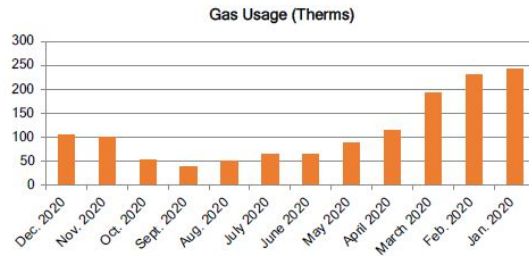
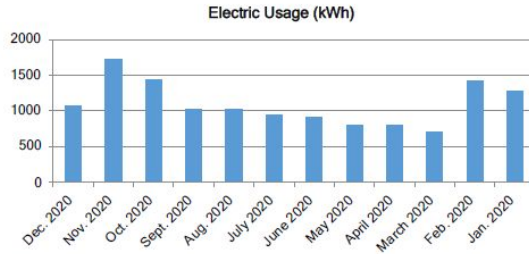
Black Hills Energy

Gas account #: 2106

Gas cost per Therm: **\$0.85**

Annual gas usage: **1,340 Therms**

Annual gas cost: **\$1,139**



Troubleshooting

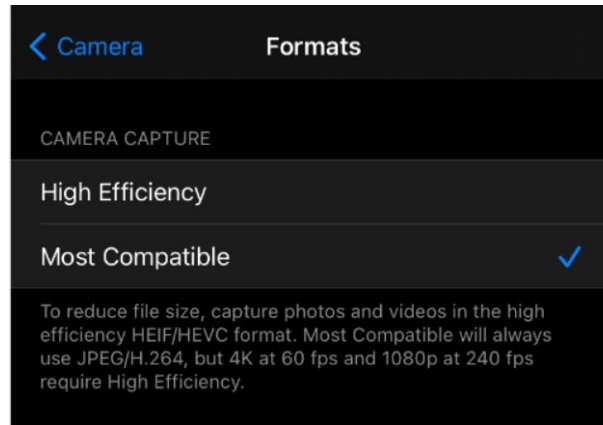
Formyoutla issues
Report issues
Support



Troubleshooting Formyoula issues

"I can't upload photos taken by my iPhone 8."

Formyoula supports PNG and JPG photo types. The iPhone 8 defaults to save photos as HEIC files. Find your camera setting to change the photos to save as "Most Compatible".



Troubleshooting Report Issues

"I submitted the report, but never received an email."

Be sure you're online, and you have selected "Preview Report" for the Assessment Stage.

Can't I just indicate "Assessment Complete" on the Assessment Stage?

You must select "Preview Report" until you receive a report that you are happy with! Don't skip to "Assessment Complete" to save time. (Typically, we'd like to see 2 "Previews" for each report).

Troubleshooting Report Issues



Recommended Upgrades

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Energy Detail (estimated)	Existing Home	Improved Home	Units
Annual energy consumption	190.1	26.0	MMBTU
Annual electrical consumption	27,856	3,814	kWh
Annual gas consumption	951	130	THERMS
PV system size to reach net zero energy (estimated)	0	0	KW
PV system cost (estimated)	0	0	\$

Recommended Improvement	Estimated Cost	Estimated Annual Savings	SIR
Reduce air leaks and weatherstrip doors to save energy and increase comfort.	\$861	\$2,456	42.8
Warm your crawl space to save energy and increase comfort.	\$796	\$473	11.9
Warm your crawl space to save energy and increase comfort.	\$796	\$473	11.9
Increase attic insulation and coverage to save energy and increase comfort.	\$1,594	\$951	11.9
Warm your crawl space to save energy and increase comfort.	\$796	\$473	11.9
Replace incandescent lights with CFLs or LEDs to save energy and replacement costs.	\$43	\$69	11.3
Replace incandescent lights with CFLs or LEDs to save energy and replacement costs.	\$60	\$77	9.0
Replace incandescent lights with CFLs or LEDs to save energy and replacement costs.	\$60	\$77	9.0
Replace incandescent lights with CFLs or LEDs to save energy and replacement costs.	\$60	\$77	9.0
Replace incandescent lights with CFLs or LEDs to save energy and replacement costs.	\$60	\$77	9.0

Troubleshooting Report Issues



I am assessing a condo/multi-family unit and I can't seem to get recommended upgrades to reflect the actions in my report, why not?

Right now, the energy modeling isn't available for multi-family units / condos.

For these building types, it is best to hide the recommended upgrades (estimated energy savings) page in the report.

Show/hide help for this page ☐

Show estimated energy savings page in report ☐

Update Energy Model ☐

Recommendations from Analysts

It would be ideal if recommendations that are typical for most homes become standard to select / choose in the tool, instead of retyping for each report or copy/pasting once the report is on a computer.

Like the help text in Formyoula, the template text that is presented on the top or left column of each page of the report can always be improved. If you have recommendations on improving the boilerplate language, please share!

Support

“The payment page isn’t correct.”

A lot of these costs are calculated through back-end formulas in Salesforce. Your ESC Program Manager can adjust these numbers in Salesforce (and you can too on the invoice page.)

With **any issues** with the report or the information being generated, contact us!

- Your ESC Program Manager
- Kasey (Kasey@EnergySmartColorado.com)
- Cameron (Cameron@EnergySmartColorado.com)

Please don’t live with “well this page is just wrong, so ignore it.”
Please tell us what is wrong so we can fix it!