

Formyoula User Guide

This document is intended to assist Energy Analysts working with Energy Smart Colorado (ESC)'s Formyoula application tool. If you don't find what you need here, please contact your local ESC program manager or email info@EnergySmartColorado.org.

Analyst Guide

ESCO – Recommended operating systems: Android 12 or above and iOS version 16.

Energy Smart Colorado's field assessment tool is located at: <https://app.formyoula.com/dashboard> or as a downloadable app. Please contact your local ESC program manager for login information and to get set up on your device(s). This is a device-independent form that can be used online or offline.

General Notes

The "ESCO" Home Energy Assessment report relies heavily on **your narrative and photos** to support what you are seeing as priorities for each customer. There are 28 individual photo slots that you can populate, along with captions that will be front and center for customers to review and take action on. Even when you don't see a need for a photo, there is probably an opportunity to snap a shot with your tablet or phone and make a useful comment for the homeowner. We'll call these "teachable moments" – and we strongly encourage you to take these as opportunities to help educate your customers.

Each section also has a "**Recommended Action**" field – this is your chance to really talk to your customer about their home, and get your main points across. Any comments that you feel are important go here, along with other points that may be outside the scope of the report (i.e.: potential upgrade project challenges, costs, etc.).

A few housekeeping notes:

Close app when not in use as it will stay running in the background, draining your battery. This is in part due to its ability to sync with Energy Smart's Salesforce database and enable offline use, and not lose any data.

At the top of each page, you will find a "**Show/hide help for this page**" checkbox. Tapping this will make your first few assessments – and ongoing inputs much easier. There are some help fields that have critical information such as N-Factors on the Air Sealing tab, and insulation de-rates on the Foundation, Wall and Roof tabs. We strongly encourage you to "show help for this page" on each page.

Be careful with your data! Pay attention to help notes and input types. The information you collect is very important and is used to model energy savings. We have tried to limit/pre-validate input, but there may be situations where questions arise. Please reach out for help answering any data input questions.

The **voice recognition** software on the iPad allows you to enter your large text areas by dictation. This feature is only available while online.

You can **show or hide pages in your final report**. Near the top of each tab in the assessment tool, you will see a field labeled: "Show this page in report". By default, report pages will always be displayed unless you unselect the box. If you have previously hidden a page, but would now like to make it visible, you must check the box and re-submit as "preview report."

Offline access

The tool allows for offline access to complete assessments. Once enabled in the Formyoula app (mobile or desktop), you can lookup ESC accounts even when offline. To enable, go to the mobile app Home page, tap the gear icon in the upper right-hand corner of the screen. Under "Salesforce", tap "On" in the box in the upper right, next to "Offline Lookups". Turn this feature on when you first set up your iPad. You will notice that there is a refresh icon next to "On". This can be used when you get back online, but cannot see your customer's record. You can safely complete your assessment while offline, but we recommend that you pre-populate your form while still online (before visiting the home) to capture homeowner enrollment information, as this information will only be pre-populated on your form when online.

Pausing Data Entry or Moving Between Devices

If you are moving between devices (such as tablet to computer), you will need to set “Assessment Stage” to “Assessment In-Progress”, then tap “Submit to ESC” to send the data to our database. Then you may go to your computer and start a new form, entering your customer’s name, and connecting to the Residential Assessment object again. Your partially completed form will pre-populate with your previously submitted data. We strongly encourage you to submit often so your data saves. This is also best practice if you are pausing your data entry to begin working on it at a later time.

Please Note. You will see an option in Formyoula to open recent entries. However, opening your household through “recent entries” will not always allow you the ability to edit your previous data. It is best practice to always pull “fresh” – i.e. re-open the account just as if you are starting from the beginning. Type in the account name, and then be sure the assessment (RA-####) populates below. All the data you previously submitted and any data that had been entered in Salesforce will populate.

Be careful too about submitting your data and then immediately going back in to edit your data. Wait a few minutes between submission and editing so the data can load to Salesforce and OptiMiser. Returning too quickly to the form will lose some of the integration.

Submitting your Report

Once your assessment inputs are complete and you are ready to receive a draft of the report, set “Assessment Stage” to “Preview Report” and “Submit to ESC”. You should receive your completed report within 10-20 minutes via email. Please review each page of the assessment report for accuracy. If you find typos or additional information you would like to add to your report, return to Formyoula to pull the customer record (with a “fresh” pull as noted above) and correct the typos or add the additional information in the fields. See below information to Modify OptiMiser costs. Once you have made your edits, you can will then set “Assessment Stage” to “Assessment Complete”, then tap or click the “Submit to ESC” on the Invoice page to submit for payment and an updated report will be emailed to you. Note you can submit as “Preview Report” as many times as you would like and the report will be emailed to you each time. Once you submit as “Assessment Complete”, only one more report will generate.

If you were not able to submit the data, you can also use a saved draft to resume data entry. You will need to tap on the draft to re-open. Once open, tap or click the gear icon in the upper right-hand corner, then select “Edit” to complete your assessment.

Photos

Always shoot front of house as landscape, not vertical. This looks much better on the final report.

We recommend using the [Flir 1](#) camera attached to your phone or tablet as a convenient time saver. This will alleviate the need to transfer photos from your SIM card to the computer, or Dropbox, etc.

Think about your photo choices as they will appear on the report. Each section has 3 photos across, with 2-line text captions below. We strongly encourage you to take only 3 photos for each tab, with at least one infrared. *Take a shot of that water heater that is in pristine condition and talk about how important it is to maintain that piece of equipment with annual flushes/tune ups.*

You don’t need to have 3 photos for each page, but you should have at least one. There is almost always a teachable moment... support it with a picture directly from your tablet or phone!

Payment Processing

Invoice Tab

There are a couple of important safety fields at the top of this tab. Although a bit out of place, we wanted you to consider them after your assessment was fully completed. These fields, “Safety Issues” and “Ambient CO”, are

both required fields. Anything noted as a safety issue will be flagged so Energy Smart staff know to follow-up with the customer on that issue. The BPI action levels for ambient CO are visible in the help text.

Pay close attention to each payment/QF field on the Invoice tab. All of these are required, so just enter “0” if the measure does not apply to your current assessment.

FAQs

How long does it take to receive my Home Energy Assessment report once I submit to ESC with **Assessment Stage** set to “Preview Report” or “Assessment Complete”?

Your preview report or completed report should be emailed to you within about 20 minutes. But, if you do not receive your report in a timely manner, please notify your local ESC partner for assistance, or email info@EnergySmartColorado.org, as there may be some missing information that is prohibiting report generation.

Screen Shots

To pull up an account, click Customer Name and type in their last name. Then click the contact information block to populate into the form, as shown:

Customer Name

Search: peltz

Peltz J. Household - Telluride
(305) 775-0130
Lotus Energy Solutions
115 Double Eagle Way, Telluride, CO 81435
janpeltz@gmail.com
ESC-022692

Customer Name

Be sure the RA - # comes up in the next box (where Select Assessment had been):

Peltz J. Household - Telluride
(305) 775-0130
Lotus Energy Solutions
115 Double Eagle Way, Telluride, CO 81435
janpeltz@gmail.com
ESC-022692

Jan Peltz
ESC-022692
RA - 12608

Much of the information from the household’s assessment enrollment form will pre-populate in the account fields, but you can modify any information that was entered inaccurately.

Modifying OptiMiser

You may modify the default costs for upgrade projects that OptiMiser has modeled. To activate, you must first submit a "Preview Report" assessment with full recommendations before an OptiMiser model will be built. After you have received the preview report by email, return to open the customer record as shown above, then click this field to connect to the OptiMiser Model for this home:

 **Modify OptiMiser Costs**

When you click this button, you should see the RA - # populate again here, as shown:

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

RA - 12608
12543.12

Click on the RA - #. (you may see some other names/numbers represented, but you want to pull the one that indicates RA - #.) Make sure the box above also remains RA - #.
Then click Select Measure:

 **Update Recommended Project Costs**

 **Select Measure**

Then select the recommendation(s) that you wish to review/modify.

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

1814.77

Improve water heater 1
WaterHeater1

Click on each recommendation that you'd like to modify. If you do not see a recommendation you have made, first ensure you have entered the information for the recommendation, submit the form, wait at least 5 minutes to see the report preview arrive by email, then return to this record.

EXAMPLE: To modify the attic insulation recommendation above, click on the attic insulation recommendation above and the following screen will populate:

✚ Update Recommended Project Costs

353.25

Increase attic insulation and coverage to save energy and increase comfort.

Attic2Only

Cost

350

Estimated Life

20

Update

To change the estimated cost from 353.25 to 350, update the cost field as shown above, then click the green button “Update.” You can then go back and modify the additional recommendations one at a time:

1. Recommended Project Costs

✚ Update Recommended Project Costs

Select Measure

Cost

Estimated Life

Each time you click on the Update Recommended Project Costs button, the full list of recommendations will preview again (as original, as you have not yet submitted the updated data to Salesforce.) Once you have made your updates to each of the recommended project costs and estimated life, being sure to save the updated costs, by hitting, the green button “Update”:

Update

Then go to the Invoice page and submit your assessment.

Invoice ▾

Add Photos

Submit

If you have modified any costs (we recommend rounding the estimates up to whole numbers, and updating the defaults to costs applicable for your community), be sure the “Update Energy Model” box is NOT checked, as shown:

Show/hide help for this page ☐

Show estimated energy savings page in report ☒

Update Energy Model ☐

If the “Update Energy Model” box remains checked, the costs you just modified will default back to the original estimates from OptiMiser, overwriting your updated entries.

You should receive an updated report by email in 15 to 20 minutes. The energy savings information is now updated on this page in the report:



Recommended Upgrades

Your Energy Smart Analyst:
Kim Wheels
(970) 708-9674



What are these numbers?

When we performed your Home Energy Assessment, we collected information that allows us to estimate energy savings on projects you might consider to save money on your energy bills. Below is a breakdown of those estimates.

Improvement	Estimated Cost	Estimated Savings (per year)	SIR (Greater than 1 means project will pay for itself with energy savings)
Improve heating system 1	\$7,000.00	\$205.83	0.4
Improve vault or flat roof insulation to save energy and increase comfort.	\$3,500.00	\$17.50	0.1
Improve water heater 1	\$1,800.00	\$33.94	0.2
Increase attic insulation and coverage to save energy and increase comfort.	\$350.00	\$7.51	0.4