

CHECKLIST FOR THE HOME ENERGY AUDIT PROCESS

STEPS	BEGINNING OF PROCESS FOR HOMEOWNER (Prior to starting any projects)	DATE/ CHECK
Creating Goals For Your Project	<p>Home Performance with ENERGY STAR helps you save money on energy costs while making your home more comfortable and durable. The more a contractor knows about problems in your home, the better prepared (s)he is to provide solutions. See Here For More. Some items to consider are:</p> <p>Breakages: Note any broken or damaged windows, doors, or portions of interior or exterior wall that could lead to drafts.</p> <p>Hot/Cold Spots: Let an auditor know if there are rooms in your home that are prone to being unusually hot or cold, as this will help auditors identify the issue.</p> <p>Know Your Budget: If you plan on making any major energy improvements, let your contractor know a spending limit so they can build an energy savings package around your budget.</p>	☐ Date:
Home Energy Audit Application	<p>Review the NYSERDA Home Performance with Energy Star Application paying careful attention to:</p> <p>Usage: You must provide a record of the previous 12-24 months of electricity and primary heating fuel usage for your building. Usage is the actual kWh of electricity, therms of natural gas, or gallons of deliverable fuels such as home heating oil. These costs change frequently so NYSERDA needs the usage, not your billing amount.</p> <p>Household Income Range: Look at the charts attached to your application to determine the area median income (AMI) for your county. Click Here For A Copy Of The Application</p>	☐ Date:
THE PROJECT PHASE FOR THE HOMEOWNER (Call PathStone along the way with questions or concerns. We are here to help at no cost.)		
Receive GJGNY Reservation Number	You will be given a reservation number to be claimed by a single participating contractor you choose. This prevents multiple contractors from claiming the same job, which can lead to unnecessary headache for you and the contractor. You must choose a contractor within 90 days to keep a valid reservation number.	☐ Date:
Choose a Contractor	<p>Although PathStone does not provide the energy audit and cannot recommend a contractor for the homeowner, we suggest choosing a participating HPwES contractor that will meet your needs.</p> <p>Research: Use websites like www.bpi.org , www.nyserda.ny.gov, and www.bbb.org to learn more about contractors in the area before using your reservation number. Remember: You can only choose one contractor to work with if you are planning on taking advantage of NYSERDA incentives including On-Bill Recovery!</p>	☐ Date:
Audit Completed; Apply for Financing	We highly recommend walking around with the contractor during the audit of your home or building. If you are expecting to pay for your energy upgrades with a loan, you should apply for financing. Refer to your Home Performance with Energy Start Assessment Application for preferred methods of payment.	☐ Date:
Review Energy Savings Package	You and the contractor will discuss the improvements to be made and a final work plan can be created. Your contractor should provide a Savings-Investment-Ratio (SIR) breakdown of suggested improvements and at least three work scope packages that meet your needs.	☐ Date:
Work Contract Submitted; Financing Pre-Approved	At this point, your financing should be on its way towards approval and the work is close to starting. You will need to choose what energy saving measures are to be installed to be submitted to NYSERDA for approval. Keep in mind there is a 90 day timeline from the point of your final work scope approval date and completion date of work. Your approved loan amount is good for 60 days.	☐ Date:
Energy Efficiency Measures Installed	At this juncture, it is important to note the start and finish date of the installation process. Although it rarely happens, it will help resolve any possible disputes that are brought up regarding the contractor's performance and work ethic.	☐ Date:
THE FOLLOW-UP PHASE FOR THE HOMEOWNER		
Test Out; Sign Certificate of Completion	Once the installation and clean-up is completed, the homeowner will sign a Certificate of Completion, verifying the contracted work was done and to your specifications. From this point on, we recommend that you track your energy consumption and compare it to previous years to find out just how much you are saving.	☐ Date:
Contractor Submits Completion	The contractor will submit their completion for NYSERDA records so we know to follow up with you and ask you about how your experience went with the program. We are interested in your questions and concerns!	☐ Date:
Homeowner Receives HEMI	If you are not eligible for the Assisted Home Performance 50% subsidy, you will receive a 10% cash back incentive from NYSERDA after the work is completed. This money will be deducted from your GJGNY loan or On-Bill Recovery financing or, if paying out of pocket, a nice reward to yourself and your family!	☐ Date:
Tell Us How it Went	Tell us about your experience having your home's energy efficiency upgraded so know more about your before and after story of home energy costs and how you benefitted from choosing PathStone.	☐ Date:

