

WHAT  
TO EXPECT  
FROM



# Home Performance with ENERGY STAR®

**Congratulations! By choosing a participating, BPI-accredited Home Performance contractor,** you have taken the first step toward making your home more energy efficient and comfortable! This “What to Expect” brochure, along with other Program information will guide you through the Home Performance with ENERGY STAR process from the initial visit to your home, to installation of energy efficiency work, and on through to project completion. It will outline what you can expect from your home performance contractor, your responsibilities as a customer, and how to get additional information.

## How the program **works:**

The New York State Energy Research and Development Authority’s (NYSERDA) Home Performance with ENERGY STAR program created a network of **independent** home improvement contractors that are accredited by the Building Performance Institute (BPI). BPI is a national resource for building science technology that sets standards for assessing and improving the energy performance, as well as the health and safety of homes. Your contractor, through their participation in this Program, has been trained in taking a ‘whole-house’ approach when testing your home and identifying energy efficiency improvements.



## STEP

# 1

## THE COMPREHENSIVE HOME ASSESSMENT (CHA)

Your participating contractor will perform a Comprehensive Home Assessment (CHA), which generally **lasts one to three hours**. The CHA provides homeowners with valuable information regarding the existing condition of their home, and **identifies areas where energy efficiency, comfort and safety improvements can be made**.

During the CHA, the contractor completes a visual inspection of the living space, attic, basement (or crawl spaces), and performs a number of tests using **special diagnostic equipment**. This equipment includes a Blower Door, which helps the contractor measure how much, and where, air is leaking from your home. Most importantly, your contractor will perform essential **health and safety tests** to determine whether the major combustion appliances (furnace, boiler, hot water

tank and stove) in your home are operating safely. According to Building Performance Institute (BPI) health and safety standards, if these tests identify any potential threats in the home, the recommended health and safety repairs must be included in any work scope you choose to implement.

The participating contractor may charge a fee for the Comprehensive Home Assessment. The fee varies from contractor to contractor and region to region. Also, the participating contractor may deduct the fee from the cost of the work performed. When talking to a participating contractor be sure to ask about their CHA fee and whether or not it is deductible if you contract with them for work.



**You are encouraged to accompany the contractor as they perform the CHA;** let the contractor know what, if any, issues or concerns you have about your home (drafts, uneven temperatures, discomfort, evidence of moisture or mold, strange smells, even physical symptoms such as persistent headaches or flu-like symptoms). And don't be afraid to ask questions during the CHA!

Using results from the CHA, your home performance contractor will explain what improvements can be made, and develop a proposal detailing the proposed improvements and the associated costs. Your contractor may subcontract work to other companies as he puts together a comprehensive set of energy efficiency and health & safety measures.

## Paying for the Work

In addition to receiving comprehensive energy efficiency services, using a participating, BPI-accredited, home performance contractor also gives you access to a number of attractive financing options designed to help you pay for the cost of the energy efficiency upgrades. Your contractor can provide you with additional details.

## STEP

# 2

## THE CUSTOMER CONTRACT

When you have decided on the improvements you want, you will be presented with a written contract to review and sign.

### Check this contract carefully.

- Make sure that all the work you want done is detailed, that everything you want to have installed is in the contract, and that there is nothing that you do not want, or do not understand, in the contract.
- In general, the price offered should be a fixed price, that cannot be changed without your written permission (see section on "Change Orders"). **Be sure the contract clearly states whether it is a fixed-price contract or an estimate.**
- The contract should cover payment terms, such as a down payment, installment payments and when the final payment is due.
- The program only recognizes contracts between a customer and a participating, BPI-accredited contractor. If other contractors are called in to complete a part of the comprehensive job scope, they must be subcontractors to your BPI-accredited contractor (unless they are also participating, BPI-accredited contractors). BPI-accredited contractors typically carry their credentials with them; or you can verify their current status by calling the program at 1-877-NYSMART.

**IMPORTANT! DO NOT SIGN A CONTRACT WITH A CONTRACTOR WHO DOES NOT PERFORM A COMPREHENSIVE HOME ASSESSMENT AND NEVER BEFORE THE CONTRACTOR HAS PRESENTED YOU WITH A WORK SCOPE THAT INCLUDES DETAILS OF THE WORK TO BE PERFORMED AND THE COST OF THE PROPOSED WORK.**

## STEP 3

### SIGNING THE CONTRACT

When you have reviewed the contract document and are satisfied, sign the contract and the Home Performance Customer Information Form. Be sure your contractor provides you with a copy of both documents. Your contractor must also submit copies to the program. No work can begin until both you and your contractor have signed these documents. **At this time, you should also discuss with your contractor the expected start and completion dates of the project.**

### Change Orders

The work scope may change during the course of the job. Some causes of these changes include the following:

- The customer decides to add or remove something from the work scope.
- The contractor discovers a problem.
- An opportunity for additional improvements presents itself during construction or installation.

**For example,** your insulation contractor may discover damage to the roof structure while insulating and air sealing an attic, or the heating contractor may find a pipe leak while replacing your boiler. Changes in the work scope are called a "Change Order." The contractor will give you a signed copy of the change order and provide the program with a copy. Be sure you fully understand the impacts before you agree to the change. The program requires that, unless warranted by special circumstances such as health and safety or lack of heat during winter, change orders be signed, dated and submitted before the new measures are installed - and before any financing or incentives are released.



## STEP 4

### INSTALLATION OF YOUR ENERGY EFFICIENCY IMPROVEMENTS

At the time you sign your contract, you and your contractor should arrange a time for work to begin and estimate the date it will be completed. **It is strongly recommended** that, at a minimum, you arrange to meet with the contractor at the beginning of each day before work begins, and at the end of the day to review work progress to ensure that all terms of the contract are being fulfilled. These meetings will allow you to follow the work progress and help you better understand the impact the work will have on your home. Being involved is particularly important if a heating or cooling system is being installed. **This will give you the opportunity to see how the system operates,** and to learn what type of maintenance is recommended. Be aware that as the work is being performed, the normal routine of your household may be disrupted. Also, it is recommended that cleanup of work areas be included in the contract.



## STEP 5

### FINAL TESTS

The energy efficiency work performed on your home will often result in your home being more airtight. To ensure that the increased air tightness does not cause air quality or combustion health and safety problems, your home performance contractor is required to repeat the tests performed during the Comprehensive Home Assessment. This process is referred to as Pre- and Post Testing or **"Test-In/Test-Out."** It is a requirement of the Program that these tests be completed and strongly recommended that you be present during the tests. On rare occasions, this test process will reveal conditions that do not meet the program's health, safety, and technical requirements. Should this be the case, your home performance contractor will recommend modifications to bring your home into compliance with program standards. These modifications must be performed before a Certificate of Completion can be signed.

## ASSISTED HOME PERFORMANCE WITH ENERGY STAR

Incentives for income-qualified homeowners are available through Assisted Home Performance with ENERGY STAR. Energy Finance Solutions 1-800-361-5663 or the community-based organization that verifies your household income will notify you in writing if you qualify.

# CLOSING OUT THE JOB

## STEP 6

### THE CERTIFICATE OF COMPLETION – ACCEPTING THE JOB AS COMPLETED

When all of the work in the original work scope and change orders is substantially complete and the final tests are completed, the home performance contractor will prepare a Certificate of Completion (CoC) for your review and signature. By signing the CoC you are agreeing that the work on your project has been substantially completed.

**DO NOT sign the Certificate of Completion until the work (original work scope and change orders) is substantially completed.** You should note on the “punch list” section of the completion certificate any remaining minor items that still need to be completed. Once you sign the Certificate of Completion, your final payment becomes due. No financing incentives can be processed until the signed Certificate of Completion has been submitted.

## STEP 7

### FOLLOW-UP WORK AND RETURN BUSINESS

Remember, in the long run, a comprehensive plan for energy improvements including insulation, sealing air leaks, and an efficient heating or cooling system, is usually the best approach to making your home energy efficient, comfortable, safe, and durable.



The Comprehensive Home Assessment Report can be as long as nine pages (a sample is available upon request). Your home performance contractor will deliver the Report by the time that your home performance job is finished. The Report provides you with an analysis of the estimated energy savings that you can expect as a result of the work performed on your home. Estimated savings are based on computer simulations, which use data based on an average heating and cooling season for your area. Actual results can vary based on the severity of the weather, changes in your lifestyle, and the fluctuation in energy prices, among other factors. **In addition to estimates of fuel and energy bill savings, the Report will include information on the payback that can be expected from the project,** listing either a simple payback (in years) or a Savings-to-Investment-Ratio (SIR). This Comprehensive Home Assessment Report is yours to keep and share with friends, neighbors and family members.

You may not be in a position to make ALL the recommended investments in your home improvements at one time. Therefore, the Program does allow you to participate in the program multiple times. However, there is a lifetime cap on the incentive amount an individual can receive. Your participating contractor can provide you with more information on the current lifetime caps for Program incentives.

**PLEASE NOTE:** Participating contractors will provide you with a written warranty on labor and materials for a minimum of one (1) year from the date the service is performed. Equipment installed will carry the manufacturer's warranty and any optional extended-warranty coverage that you select.

Neither NYSERDA, nor Conservation Services Group (CSG), the Program implementer, warrants the products and/or services of participating contractors; nor are they responsible or liable for any work performed by participating contractors or their suppliers. Participating contractors are responsible for dealing directly with any customer concerns about quality and workmanship.

To qualify for participation in the New York Home Performance with ENERGY STAR program, homes installing the eligible energy-efficiency improvements and/or renewable technologies must be assessed by the System Benefits Charge in one of the following New York State investor-owned utilities territories: Central Hudson Gas & Electric Corp., Consolidated Edison of New York, Inc., New York State Electric and Gas Corporation, Rochester Gas and Electric Corporation, Niagara Mohawk Power Corporation, or Orange and Rockland Utilities, Inc.

To obtain information on BPI's customer dispute resolution policies, contact BPI at 518-899-2727.

For information about Assisted Home Performance with ENERGY STAR, contact EFS at 1-800-361-5663.

For all other questions about Home Performance with ENERGY STAR, visit [www.GetEnergySmart.org](http://www.GetEnergySmart.org) or call 1-877-NY-SMART.

