VisionDSM Contractor User Guide Columbia Gas of Pennsylvania LIURP Program

May 2016 – Version II

Applied Energy Group, Inc.

5/23/2016

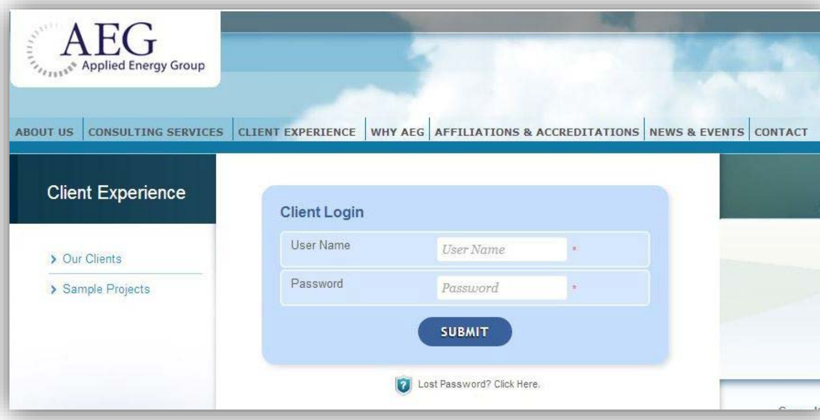
VisionDSM Contractor User Guide
Columbia Gas of Pennsylvania LIURP

This user guide provides directions for navigating in VisionDSM and utilizing program Workflow Statuses assigned to Contractors for the **LIURP Program**. Sections **1 through 8** include SAMPLE instructions for logging in, utilizing VisionDSM functionality and understanding Application Workflow. Sections **9 through 13** include instructions and screen shots specific to contractor required tasks for the CPA LIURP program. ***NOTE:*** *Each section is linked to the Table of Contents below – simply place your cursor over the desired section to jump directly to the instructions and screen shots.*

1. Logging into VisionDSM

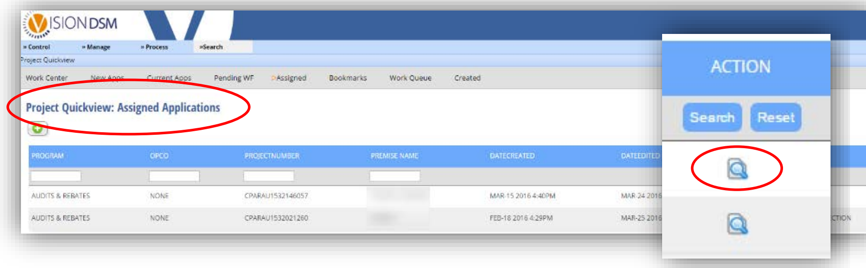
1. Navigate to the VisionDSM Login page at https://client.aegonline.com/ .
2. Enter your **User Name** and **Password.**
3. Select the SUBMIT button.

__NOTE:__ To retrieve or change your Password, select the Lost Password link shown here.

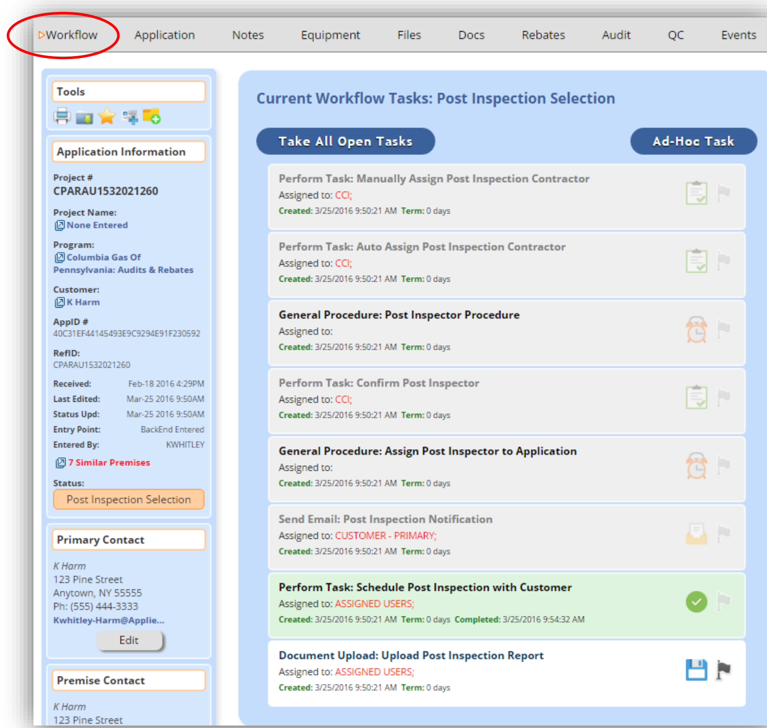


4. Upon logging in, Contractors will automatically be directed to the **PROJECT QUICKVIEW: ASSIGNED APPLICATIONS** page as illustrated here.

***IMPORTANT NOTE:** Contractors will be able to view ONLY those applications assigned to them in the system.*

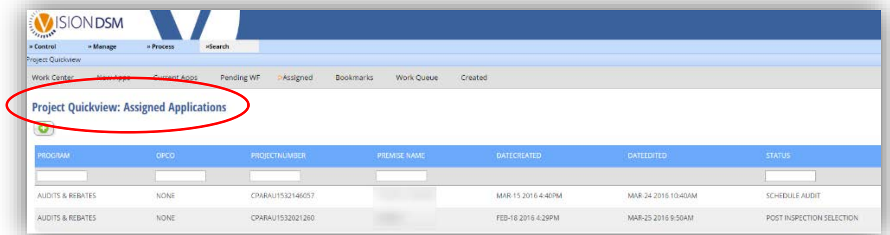


5. Select the **VIEW PROJECT** icon located to the right of a selected application.
6. The application will be displayed in the **current Workflow** Status for the selected application as shown.



2. How to Search for a Customer Application

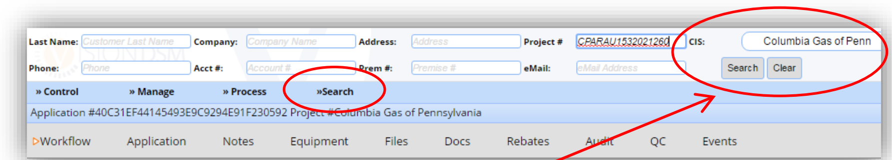
After completing Step 1 to log in, User will be navigated to the **Project Quickview** screen in VisionDSM. This screen includes the SEARCH tab option in the top menu bar.



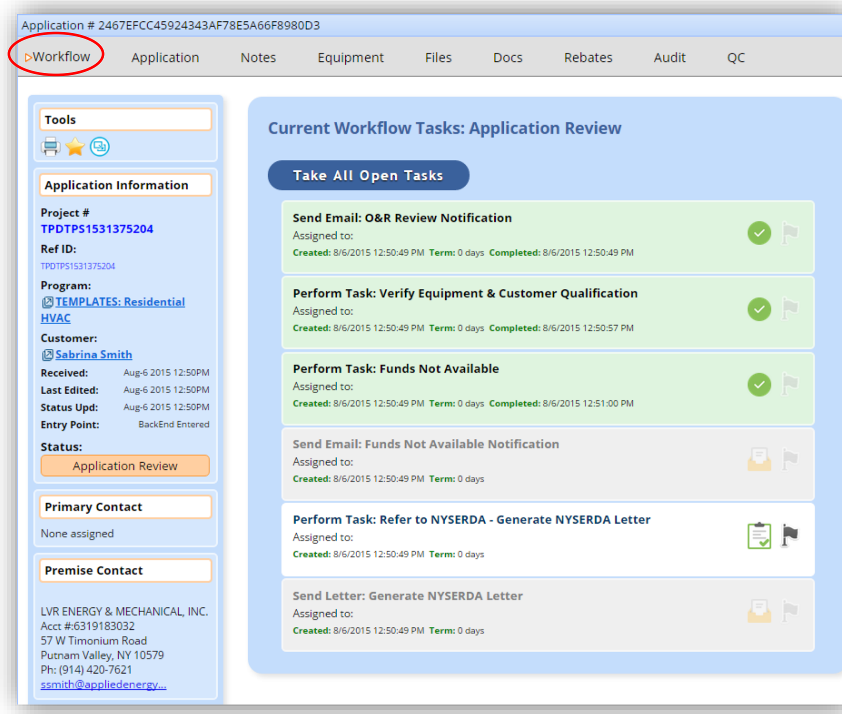
OPTION 1: If the Project Number is known:

1. Select **SEARCH** above the **Project Quickview** menu tabs and select *"Customer/App Search"* from the drop down menu.
2. The **Search Panel** will appear. User has the option to search by fields displayed with available customer data. *(Project Number, Last Name, Company, Address, Acct. #, etc).*
3. Enter the **PROJECT NUMBER** in the field shown.

   NOTE: *Utility Name will automatically display in the CIS field.*
4. Select the ***Search*** button under the CIS field.



5. The Workflow Tab will open and be displayed in the <u>**current Workflow**</u> Status for the selected application as shown.



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VISION DSM

OPTION 2: If the Project Number is NOT known:

1. User has the option to **SEARCH** by fields displayed with available customer data.

    - ***Last Name or Account # are preferred Search fields in VisionDSM.***

2nd Pane – CUSTOMER ACCOUNTS

1. All customer <u>applications</u> with the last name 'Smith' are listed in the **2nd pane – CUSTOMER ACCOUNTS.**

2. Users can select the 

icon here to **View previous customer applications** in the selected customer name here and edit customer accounts.

3rd Pane – APPLICATION CONTACTS

1. All *ACTIVE* Project Applications in VisionDSM for the selected customer can be viewed in the **3rd PANE – APPLICATION CONTACTS.**

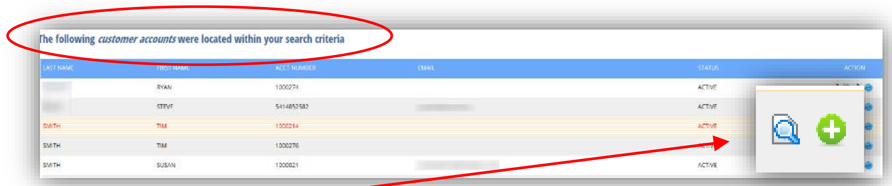
2. Users can select the 

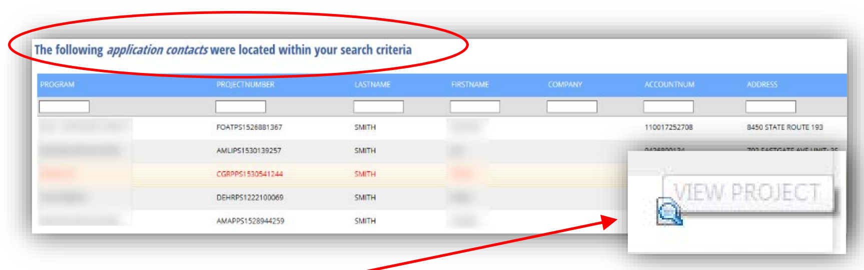
icon to the far right of the customer project application to **open it in the Workflow View current status** as shown.

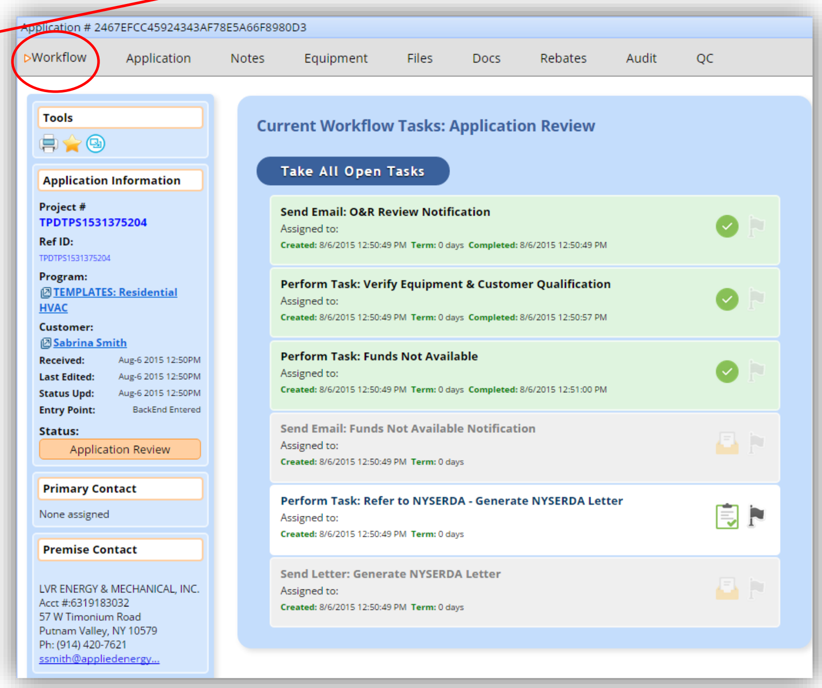
IMPORTANT NOTE: Contractors will be able to view ONLY those applications assigned to them in the system.

Example shown: Last Name: SMITH

NOTE: All customer accounts and active project applications will be displayed in the 2 'Panes' shown in the examples below.





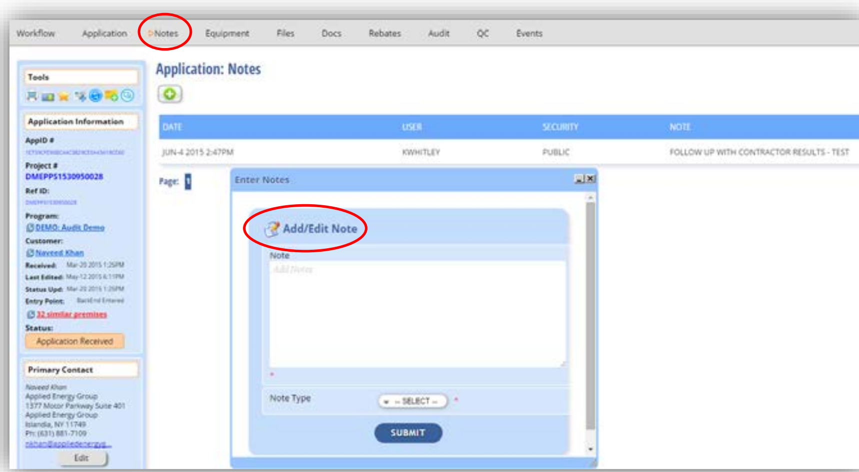


3. How to Add Notes

The **NOTES** tab allows users to document any additional information that is specific to the project application. These notes are then available to other users with access to the application.

1. In the **selected Application** view, navigate to the **Notes** tab at the top.
2. Select the button to **Add New Notes.**
   Note: The **Add/Edit Note** dialog box opens.
3. Enter note in the **Note** field.
4. Select in **Note Type** field.
   Note: *Options are Public and Private.*
5. Select the SUBMIT button.
   Note: Data will be displayed in the *Application Notes* section.

SAMPLE

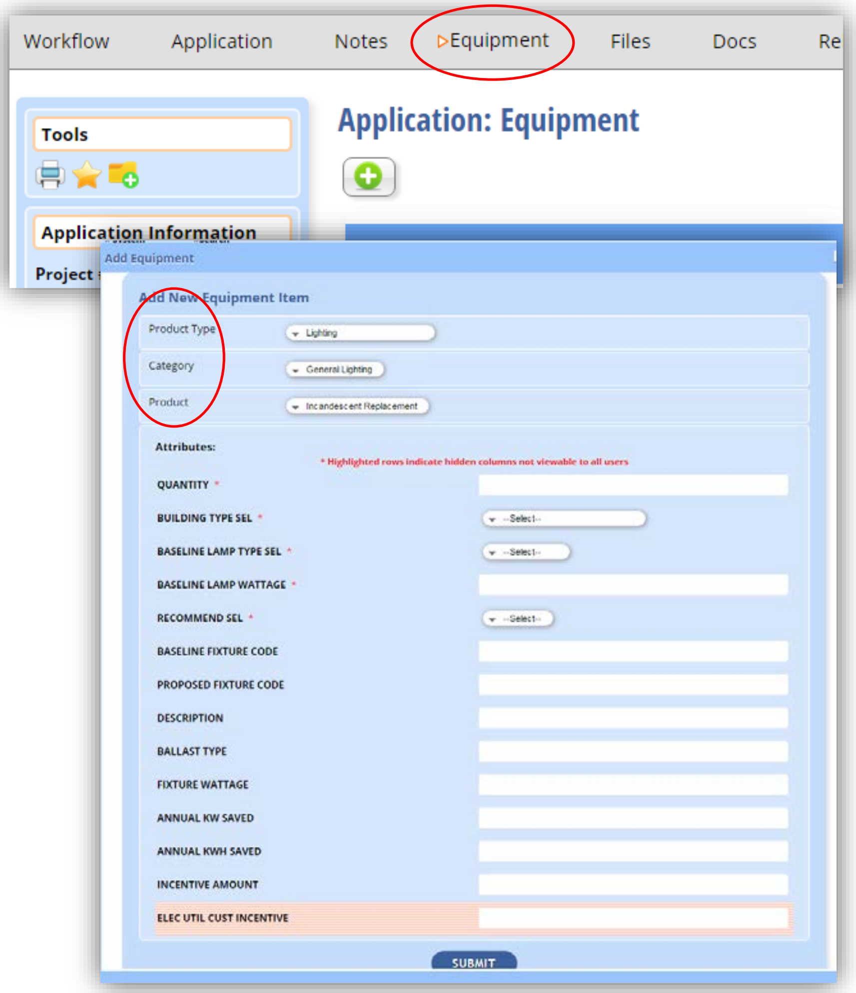


4. How to Add Measures

SAMPLE

1. Select the Equipment *(Measures)* tab for the selected Application. The **Application: Equipment** management screen opens.
2. Select the button to Add New Equipment (see sample shown).
3. **Note:** The **Add Equipment** dialog box opens.
4. Select the button in the **Product Type, Category and Product** fields.
5. **Note**: Or select option available to **Search Equipment Name** and enter in field.
6. Enter applicable attributes in product fields.
7. Select the SUBMIT button.

NOTE: *Measures (Equipment) records will now be displayed on* ***Application: Equipment*** *screen as shown here.*

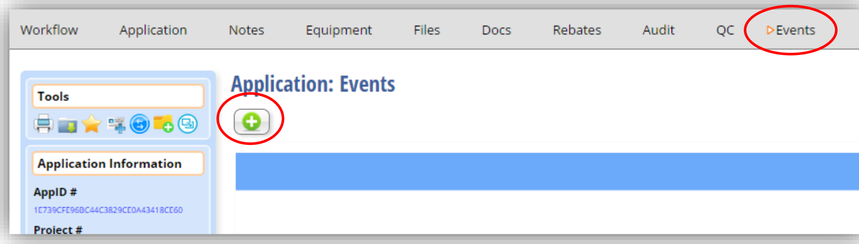


5. How to create an Event

SAMPLE

Events Management is a way to track additional information not captured on the application tab, such as incoming or outgoing customer calls and when an audit was scheduled.

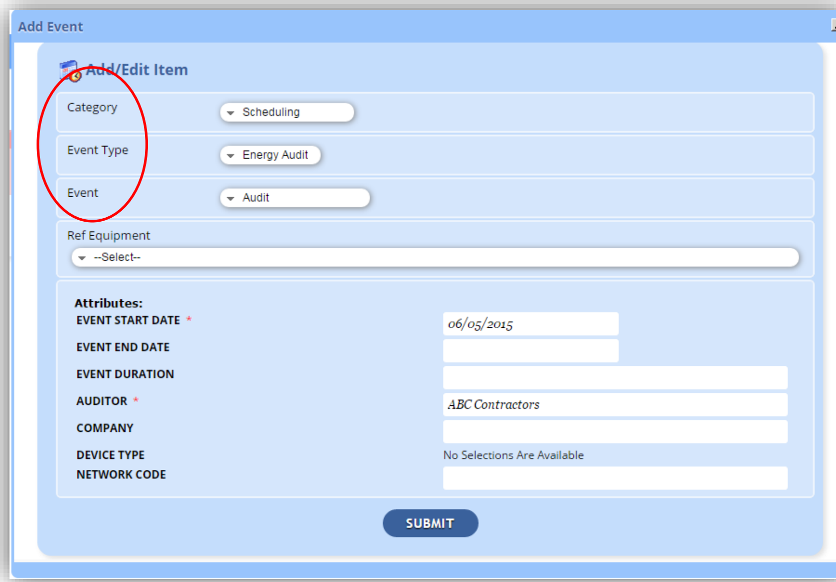
The Events tab can also 'hold' all interval data for *Demand Response* Programs.



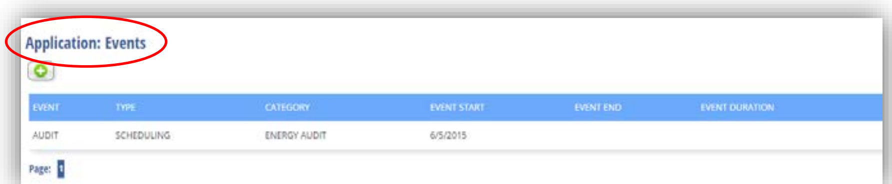
To add an 'Event', select the button to **Add New Event.**

1. Select the button and populate from the choices in the **Category**, **Event Type** and **Event** fields.
2. Enter applicable data in **Attributes** fields provided and select the SUBMIT button.

Note: *Required fields are marked with a red asterisk **



The Events information will then be displayed as illustrated here.



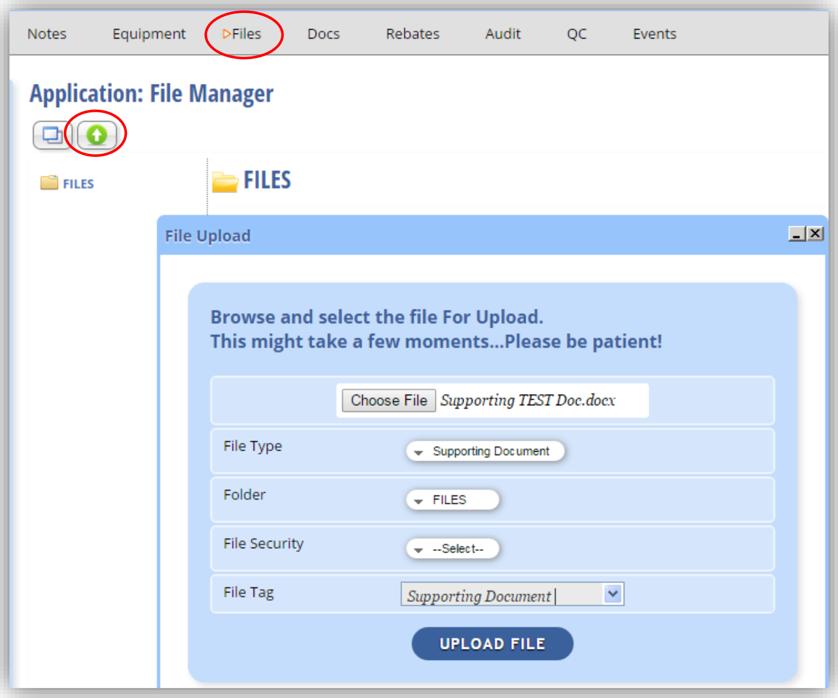
6. How to upload Files

SAMPLE

The **FILES** tab of an application allows you to upload and store application documents. Files can then be organized under customized folders specific to the program.

Documentation can be added via the button located in the project **FILES** tab. The File Upload dialog box will open.

1. Select the Choose File button to locate and open the file.
2. Select and populate the **File Type**, **Folder** and **File Security** fields.
3. Enter preferred file name in **File Tag** field provided and select the UPLOAD FILE button.

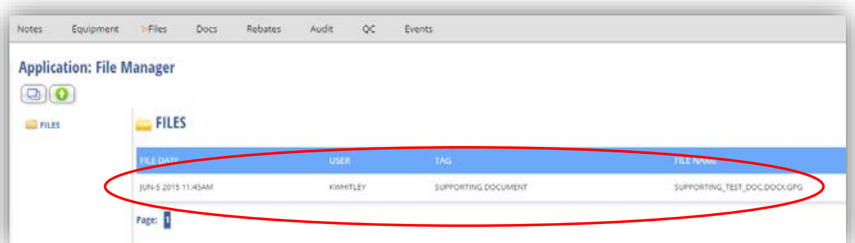


NOTE: Please use the following naming convention when uploading files:

Customer Last Name_File Type

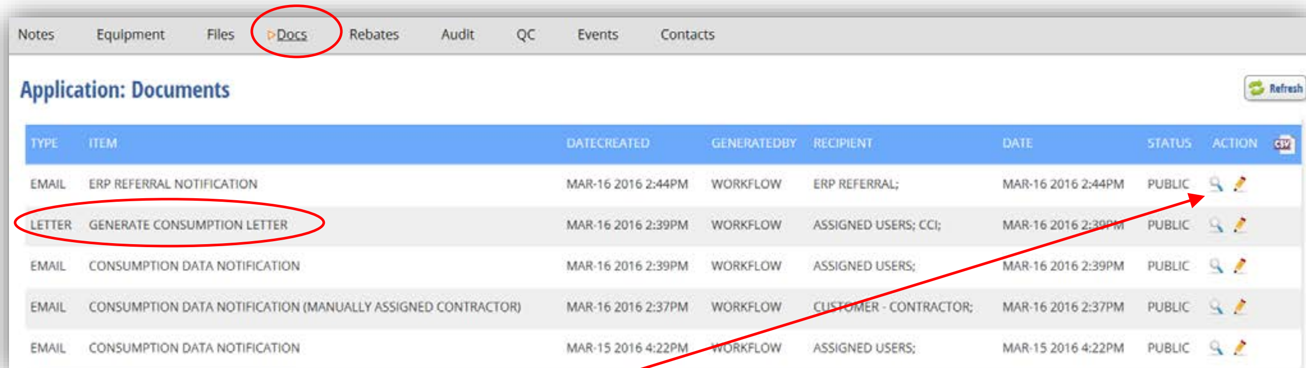
(i.e. Jones_post inspection)

The file(s) will then be displayed as shown.

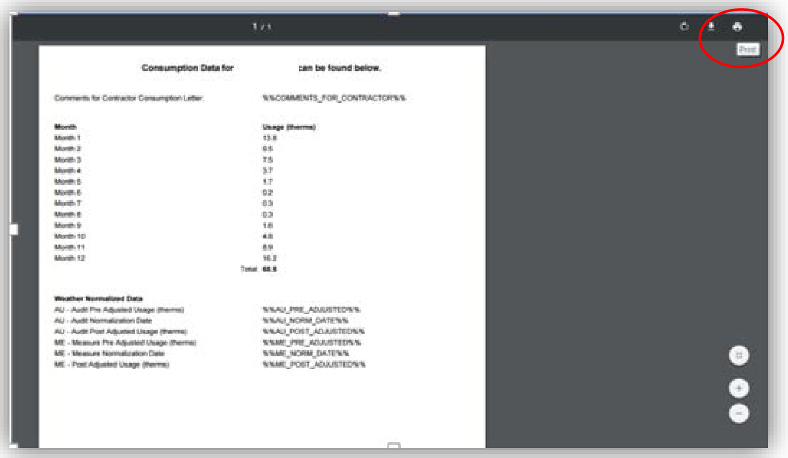


7. How to View and Print Customer Consumption Data Letters

1. To access the Customer Consumption Letter for a project application, select the **DOCS** tab to display the **Application: Documents** section.



2. Select the  View Document icon to display the selected **Consumption Data Letter.**

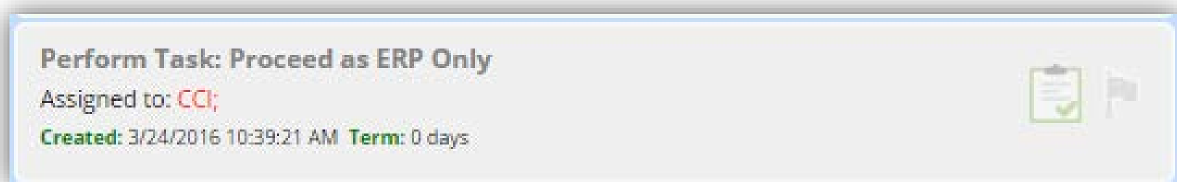


3. Select  Print icon to print the selected Letter.

8. About Application Workflow Statuses

Application Statuses are the milestones a project will go through until the project is considered complete, cancelled, denied or void. The program business process dictates what needs to happen in order for a project to move through its application lifecycle. Tasks (activities) have been created within each of the application statuses for a specific program. *Some Statuses may have NO associated Tasks for the User to perform.* Selection of some Tasks as **"Complete"** will automatically move the application to the next appropriate Status or direct VisionDSM to perform some automated task (i.e. send an email, run a general procedure or send a letter to document queue.)

NOTE: Contractors will ONLY have access to Workflow Statuses with assigned Tasks for them to complete in VisionDSM. Tasks that are 'greyed out' are NOT assigned to you as shown in example below:



These processes allow the Workflow to advance so that all Statuses & Tasks are performed and completed in the correct order designated by the User. Automation is also present at various places in the application workflow to ensure proper checks are occurring along with desired system behavior.

The following statuses are default statuses in VisionDSM:

- *Application Received*
- *Application Completed*
- *Application Cancelled.*

9. Schedule Audit Status

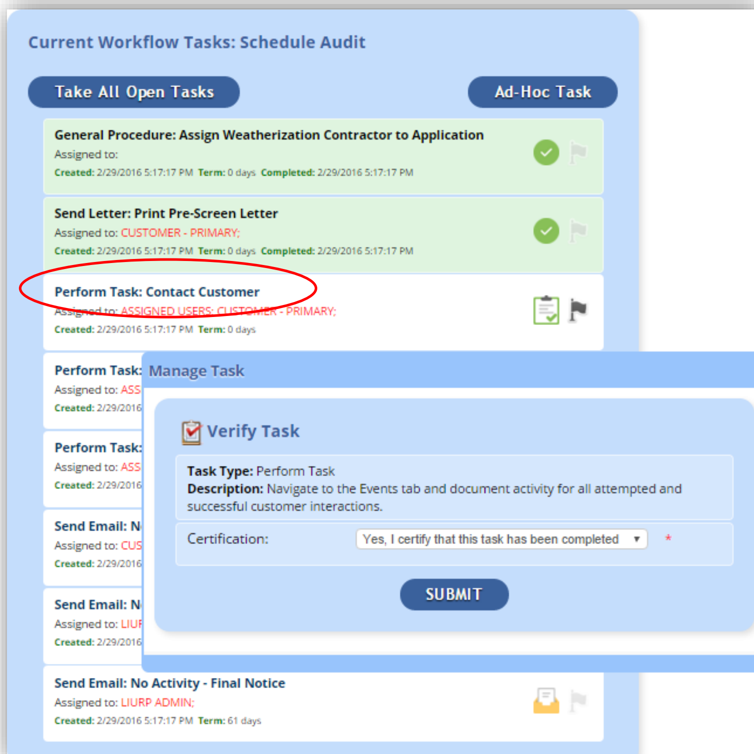
Upon arrival in this status, VisionDSM has automatically generated approval letter and sent LIURP Customer information to contractor via email notification. Additionally, VisionDSM automatically assigned Weatherization Contractor to project and generate Pre-Screen letter to print.

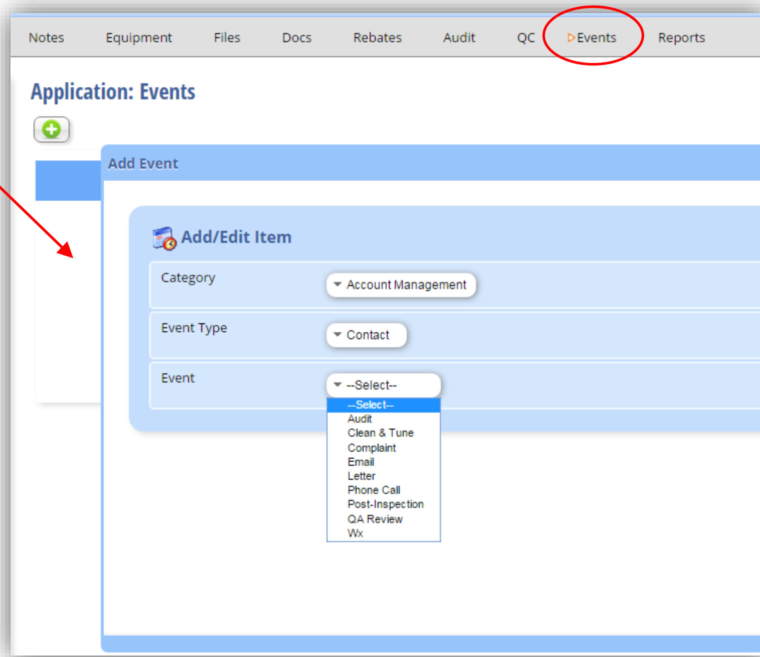
PERFORM TASK: CONTACT CUSTOMER

1. Select the icon to open task box.
2. Navigate to the **EVENTS tab*** and document activity for all attempted and successful customer interactions.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the **SUBMIT** button. Icon is .

See Section 5: How to create an Event

NOTE: *Contractors* ***MUST*** *create all Events requested for this program in order to accurately document all customer communications.*

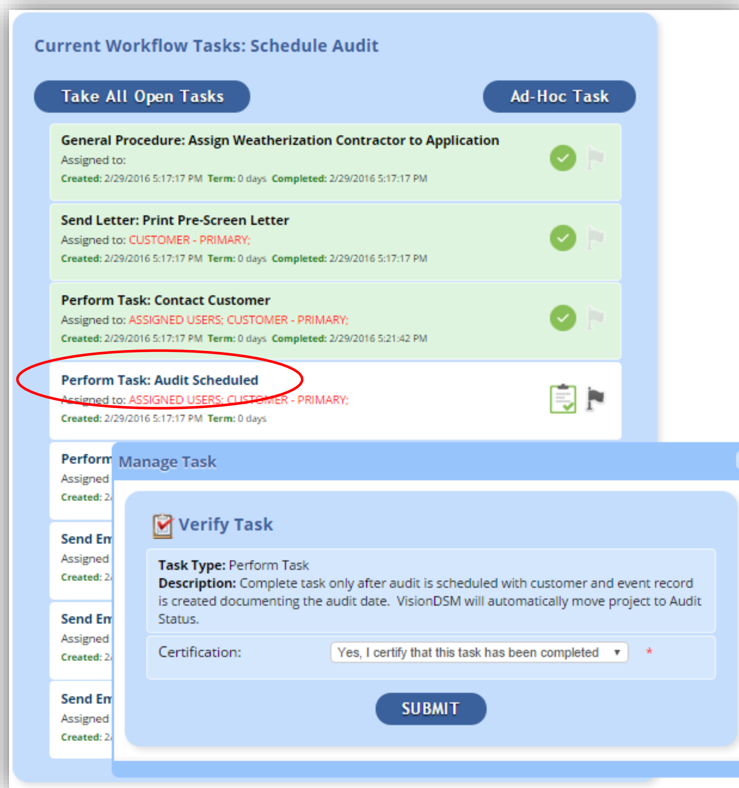




PERFORM TASK: AUDIT SCHEDULED

1. Select the icon to open task box.
2. Complete task ONLY after audit is scheduled with customer and event record is created documenting the audit date. VisionDSM will move project to Audit Status.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

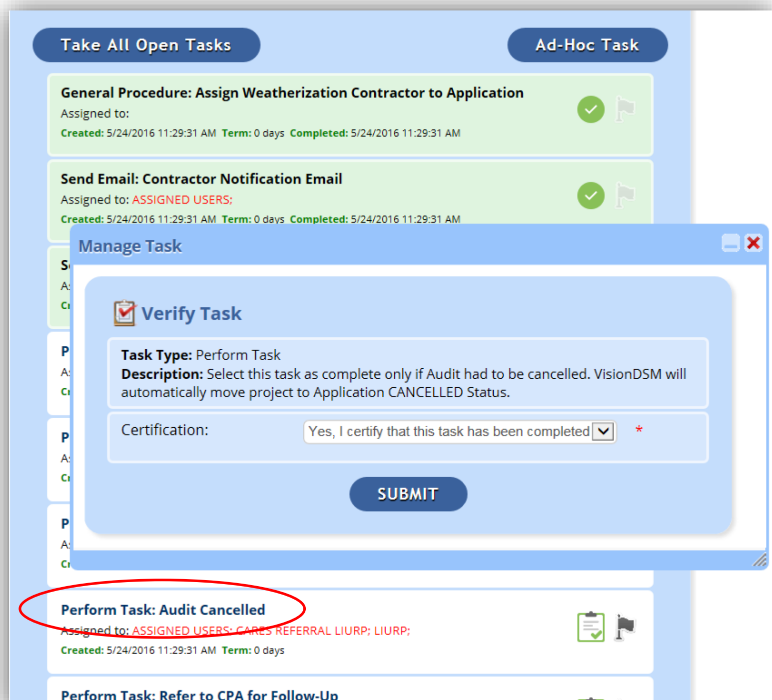
NOTE: Selecting this task as Complete will automatically move project to Audit Status (Section 10).



PERFORM TASK: AUDIT CANCELLED

1. Select the icon to open task box.
2. Select this task as complete only if Audit had to be cancelled. VisionDSM will automatically move project to Application CANCELLED status.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

NOTE: Selecting this task as Complete will automatically move project to Application CANCELLED Status.

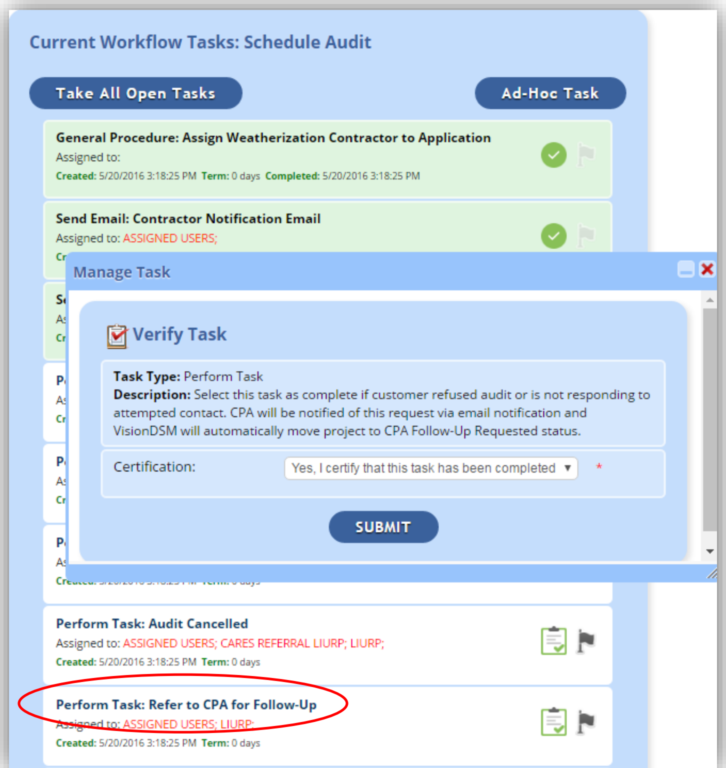


PERFORM TASK: REFER TO CPA FOR FOLLOW-UP

1. Select the icon to open task box.
2. Select this task as complete if customer refused audit OR is not responding to attempted contact. <u>CPA will be notified of this request via email notification and VisionDSM will automatically move project to CPA Follow-UP Requested status.</u>
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

NOTE: Selecting this task as Complete will automatically move project to CPA Follow-Up Requested Status.

*VisionDSM will automatically send 7 day and/or 14 day email notifications if there is no activity since referral. After 60 days, a FINAL Notice email notification is sent to LIURP administration and the project is CANCELLED. VisionDSM will automatically move project to **Application Cancelled Status.***



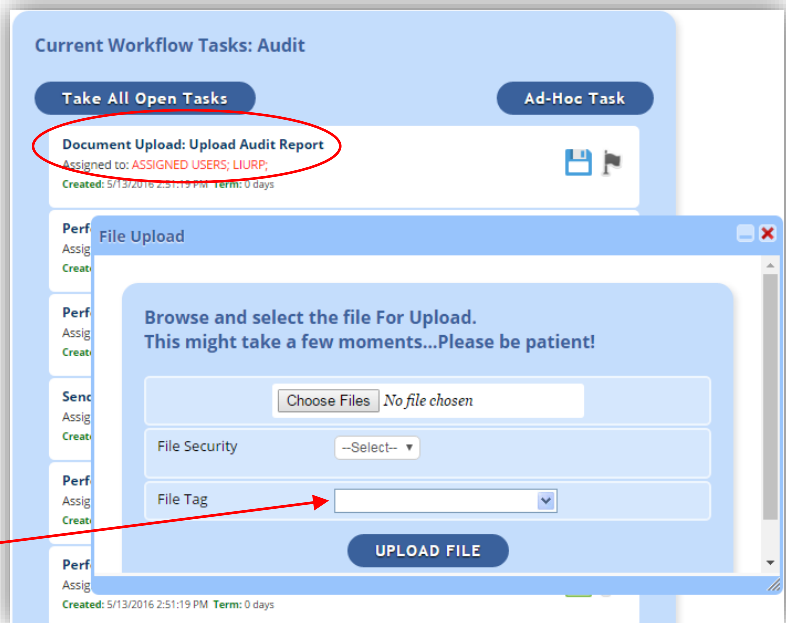
10. Audit Status

DOCUMENT UPLOAD: UPLOAD AUDIT REPORT

1. Select the icon to open File Upload box.
2. Select the Choose File button and locate Contractor Invoice / Store Receipt.
3. Select the Open button.
4. Select in **File Security** field.

   Note: *Options are Public and Private (preferred)*
5. Make appropriate selection.
6. Select in **File Tag** field and assign File Name, if desired.

   NOTE: *Please name all documents before uploading your file(s).*
7. Select the UPLOAD FILE button. Icon is now .



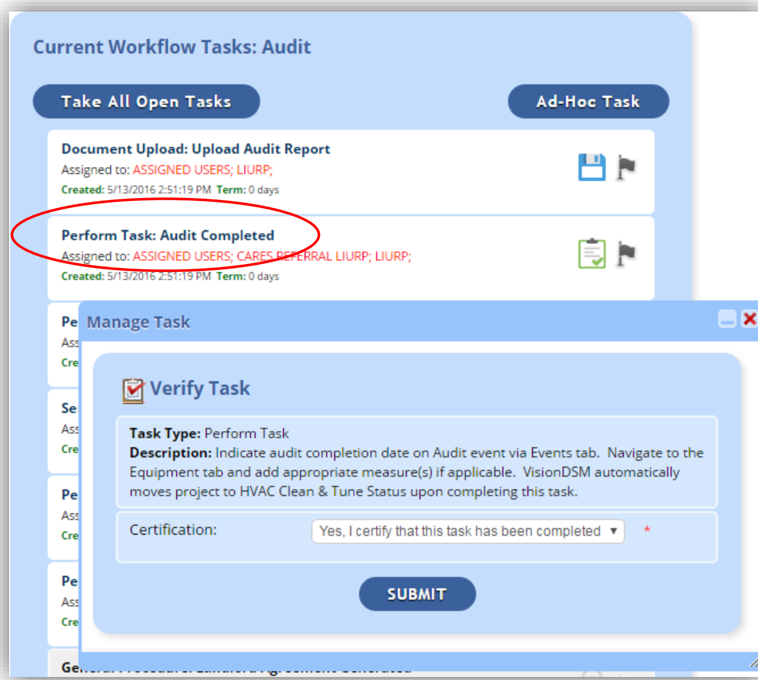
PERFORM TASK: AUDIT COMPLETED

1. Select the icon to open task box.
2. *Indicate audit completion data on Audit event via* **EVENTS tab****. Navigate to the **Equipment tab*** and add appropriate measure(s) if applicable. Project will be moved to HVAC Clean & Tune Status upon completion of this task.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

See Section 4. How to Add Measures

*****See Section 5. How to Create an Event***

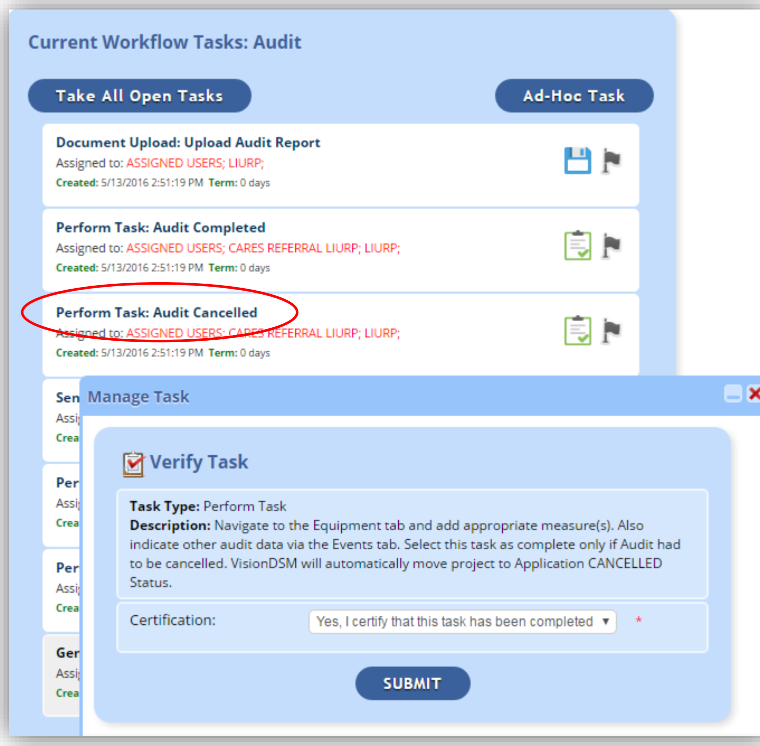
NOTE: *Selecting this task as Complete will automatically move project to* ***HVAC Clean & Tune Status (Section 11).***



PERFORM TASK: AUDIT CANCELLED

1. Select the icon to open task box.
2. Navigate to **EQUIPMENT tab***and add appropriate measure(s). Also indicate other audit completion data via **EVENTS tab****. Select this task as complete ONLY if Audit had to be cancelled. Project will be moved to Application Cancelled Status.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

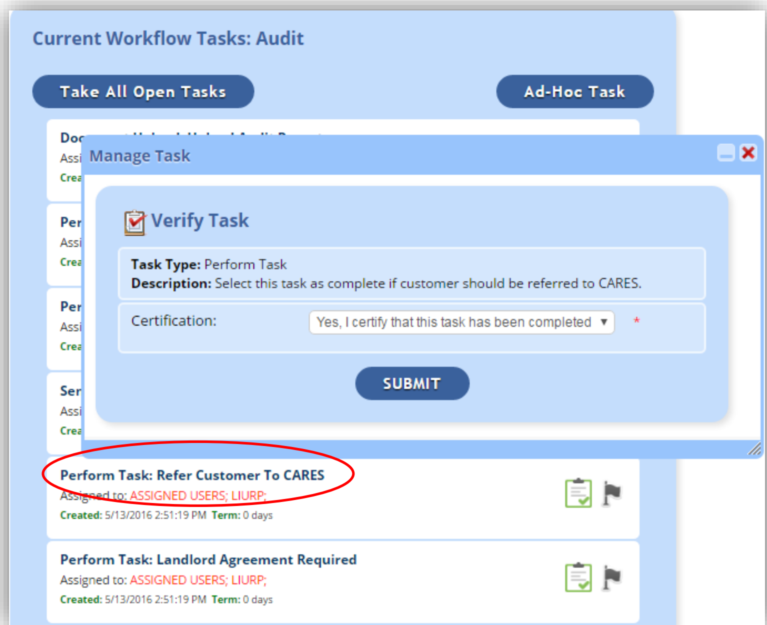
*NOTE: Selecting this task as Complete will automatically move project to **Application Cancelled Status.***



PERFORM TASK: REFER CUSTOMER to CARES

1. Select the icon to open task box.
2. Select this task as complete if customer should be referred to CARES. VisionDSM will automatically move project to CARES Referral Status.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

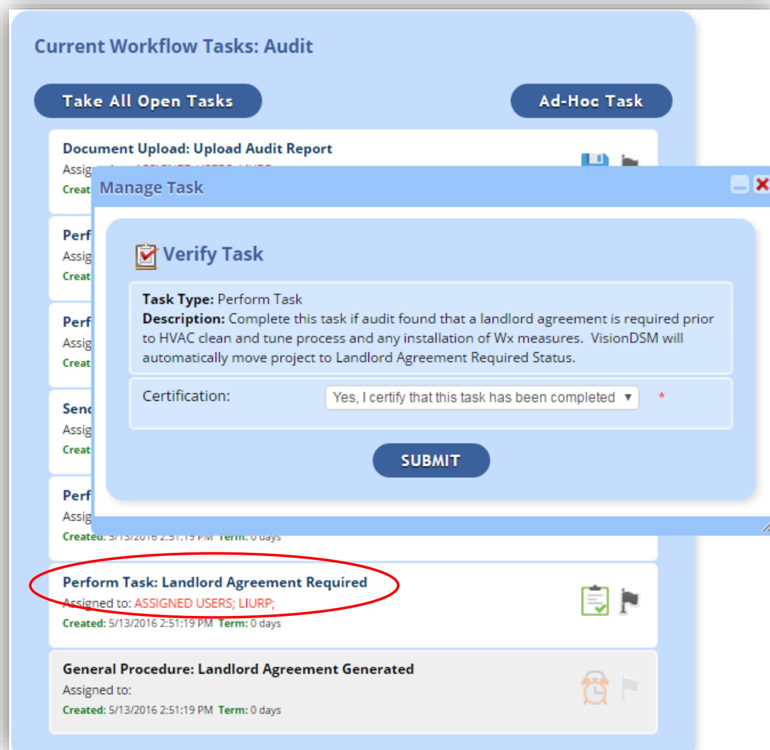
*NOTE: Selecting this task as Complete will automatically move project to **CARES Referral Status.***



PERFORM TASK: LANDLORD AGREEMENT REQUIRED

1. Select the icon to open task box.
2. Complete this task if audit found that a <u>Landlord agreement is required prior to HVAC clean and tune process and any installation of Wx measures.</u> Project will be moved to Landlord Agreement Required Status and notifications to generate Landlord agreement Letters will be sent.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

NOTE: *Selecting this task as Complete will automatically move project to* ***Landlord Agreement Required Status (Section 11).***

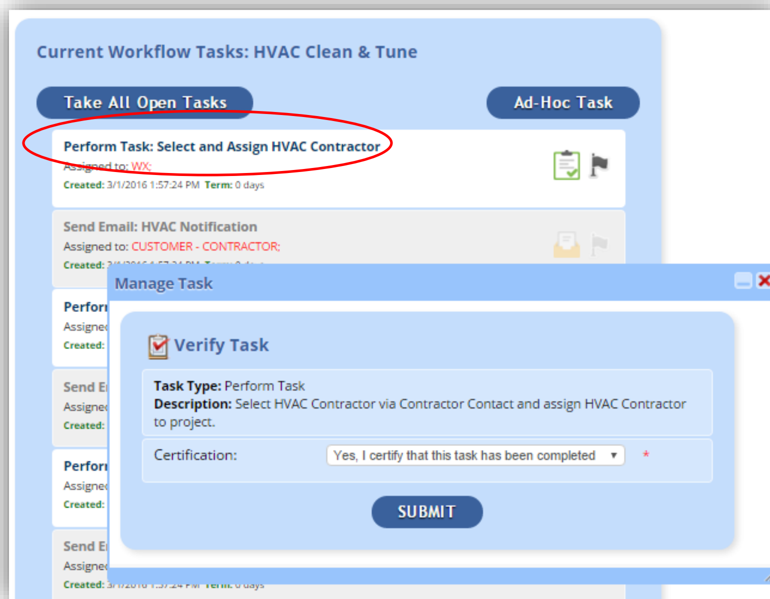


11. HVAC Clean & Tune Status

PERFORM TASK: SELECT AND ASSIGN HVAC CONTRACTOR

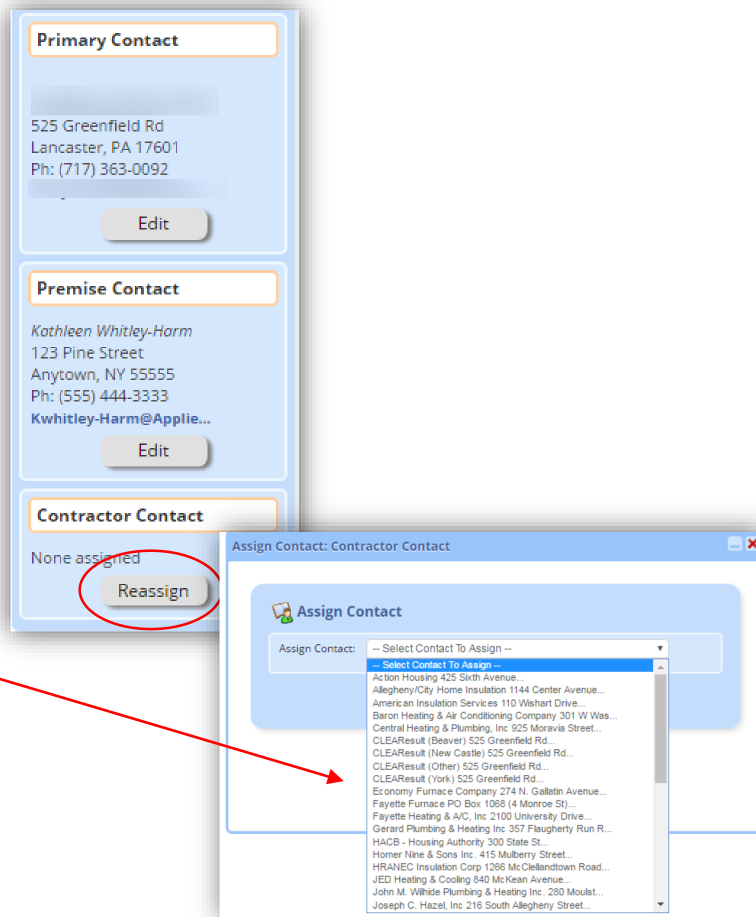
1. Select the icon to open task box.
2. Select HVAC Contractor via Contractor Contact and assign HVAC Contractor to project.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

Note: VisionDSM will automatically send HVAC Contractor Notification email upon completion of this task.

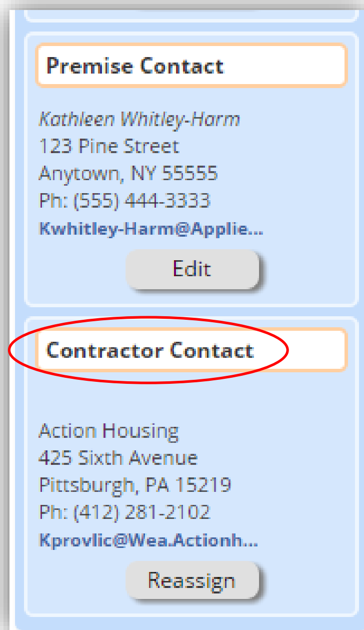


How to Assign an HVAC Contractor:

5. Select the Reassign button in the **CONTRACTOR CONTACT** section of the Contact information area in the left hand menu bar.
6. The **Assign Contact: Contractor Contact** box will now display. Select the **Contact to Assign** from the drop-down menu list, as shown in example here.
7. Select the SUBMIT button to save selection.



8. The **Contractor Contact** section will now display as shown.



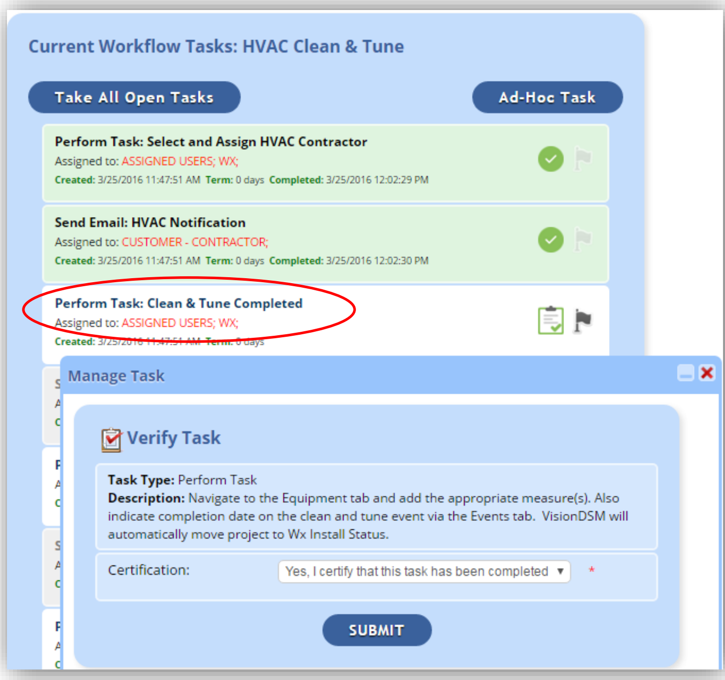
PERFORM TASK: CLEAN AND TUNE COMPLETED

1. Select the icon to open task box.
2. *Navigate to* **EQUIPMENT tab*** and add the appropriate measure(s). Also indicate completion date on the Clean and Tune Event via the **EVENTS tab****. Project will be moved to Wx Install Status.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

See Section 4. How to Add Measures

*****See Section 5. How to Create an Event***

NOTE: *Selecting this task as Complete will automatically move project to* ***Wx Install Status (Section 13).***

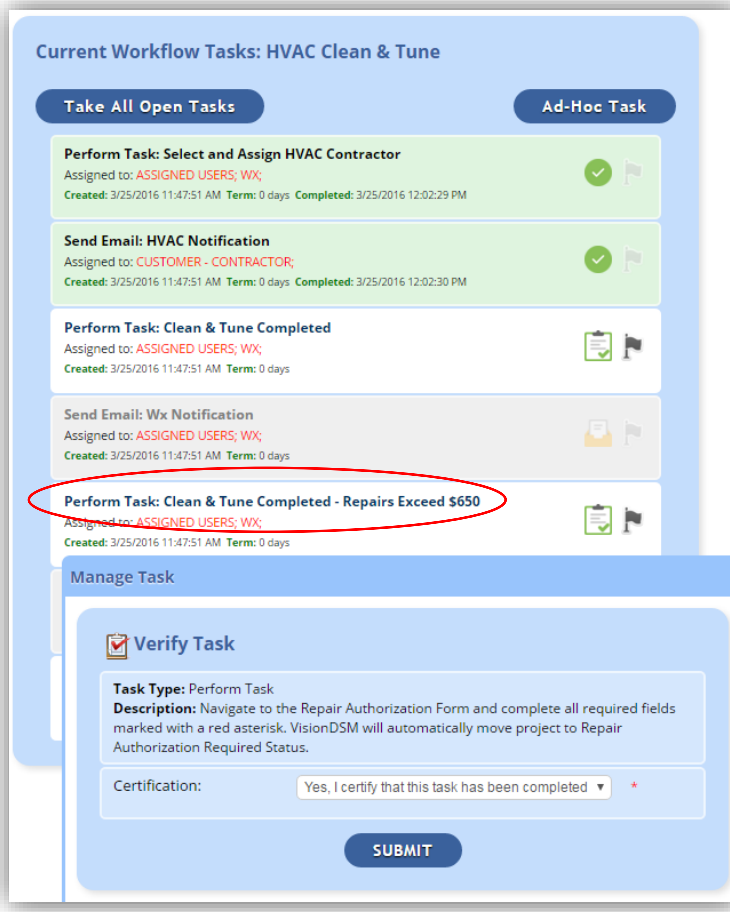


PERFORM TASK: CLEAN & TUNE COMPLETED – REPAIRS EXCEED $650

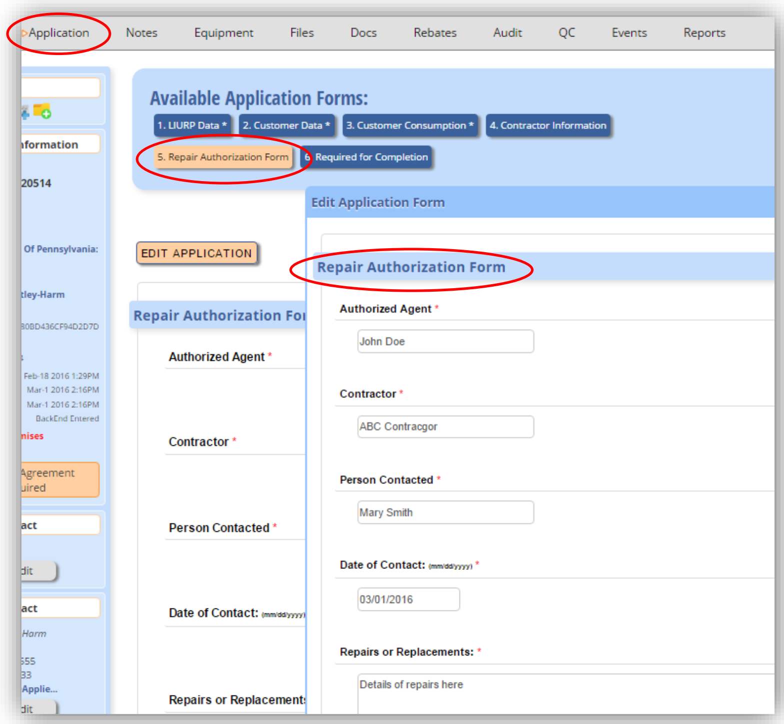
1. Select the icon to open task box.
2. *First*, navigate to the **Repair Authorization Form** (see below) and complete all required fields marked with a red asterisk* (including Total Cost) in the Repair Authorization Form section. Project will then be moved to Repair Authorization Required Status.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

NOTE:** Selecting this task as Complete will automatically move project to **Repair Authorization Required Status.

Note:** VisionDSM will automatically send Customer Not Responding Notification 1 email **if no response after 14 days.** Project will then be moved to **Section 12. Wx Follow up Required Status.



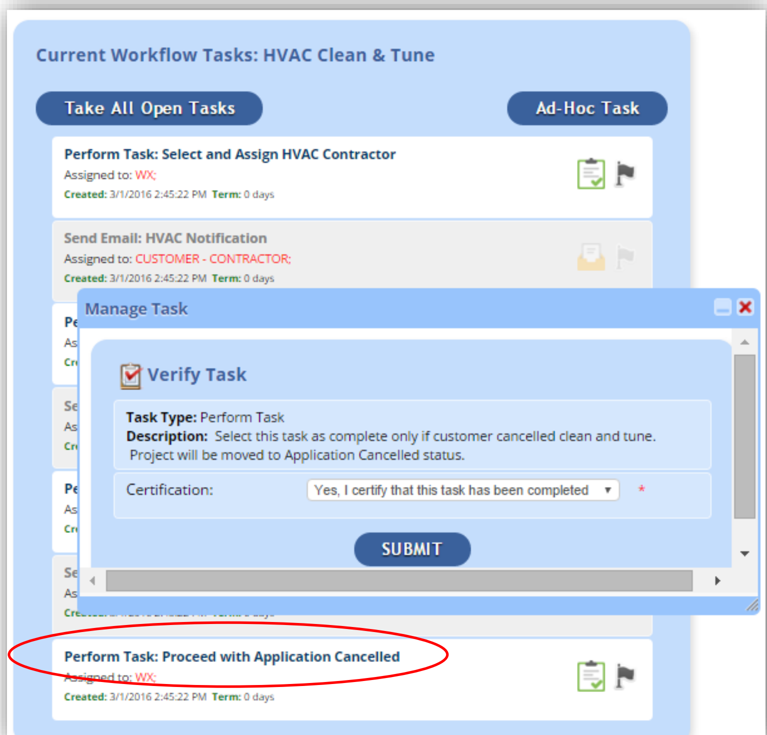
1. Navigate to the **APPLICATION** tab in the grey menu bar. Select the 5. Repair Authorization Form form.
2. Select EDIT APPLICATION to open the **Edit Application** Form dialog box.
3. Complete all required fields marked with a red asterisk as shown.
4. Scroll down and select CONTINUE to save your changes. (*Repair Authorization Form fields will now display).*
5. Navigate back to **Workflow tab.**



PERFORM TASK: PROCEED WITH APPLICATION CANCELLED

6. Select the icon to open task box.
7. Select as complete ONLY if customer cancelled Clean and Tune. Project will be moved to Application Cancellation Status.
8. Select **Yes, I certify that this task has been completed** in the Verify Task box.
9. Select the button. Icon is .

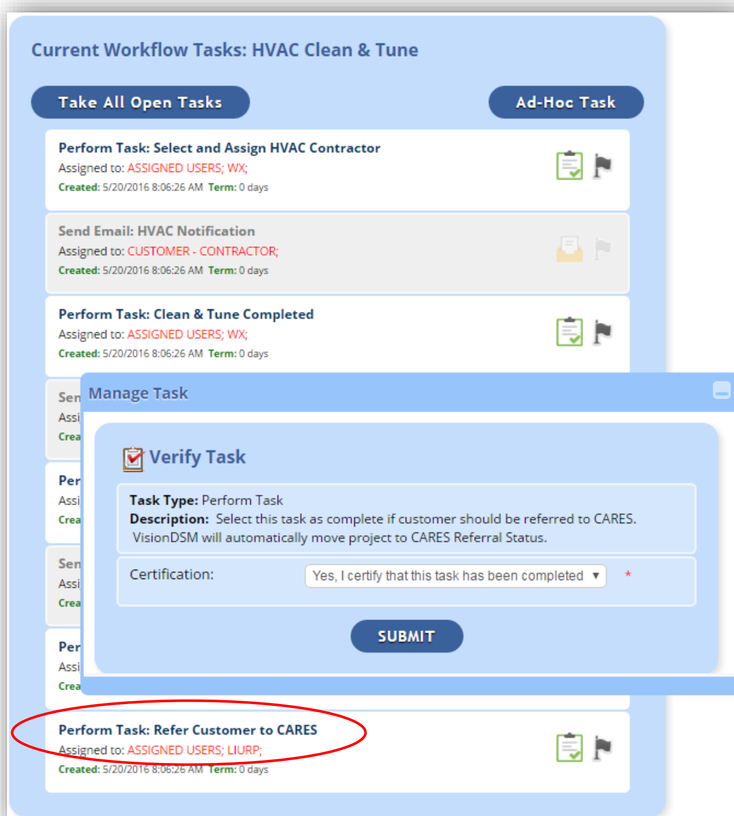
NOTE: Selecting this task as Complete will automatically move project to Application Cancelled Status.



PERFORM TASK: REFER CUSTOMER to CARES

1. Select the icon to open task box.
2. Select this task as complete if customer should be referred to CARES. VisionDSM will automatically move project to CARES Referral Status.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the button. Icon is .

   NOTE: Selecting this task as Complete will automatically move project to CARES Referral Status.

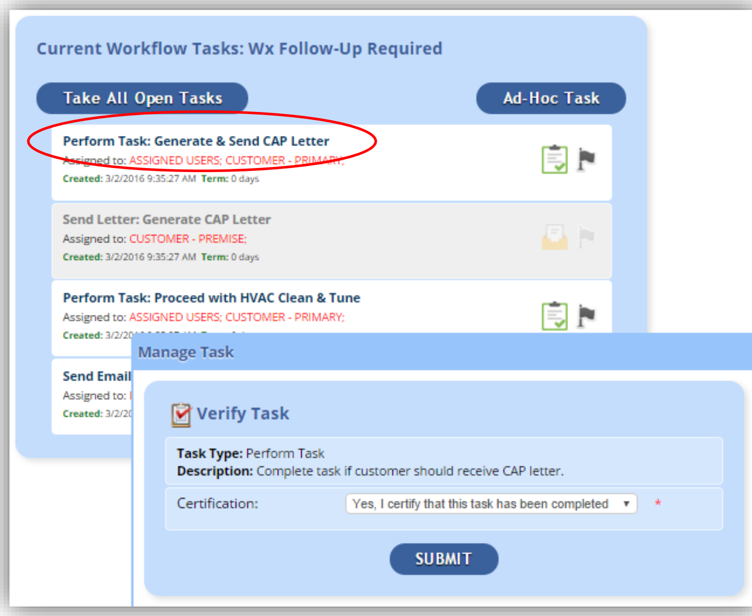


12. Wx Follow-Up Required Status

PERFORM TASK: GENERATE & SEND CAP LETTER

1. Select the icon to open task box.
2. *Complete task if customer should receive CAP letter.*
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is ✓.

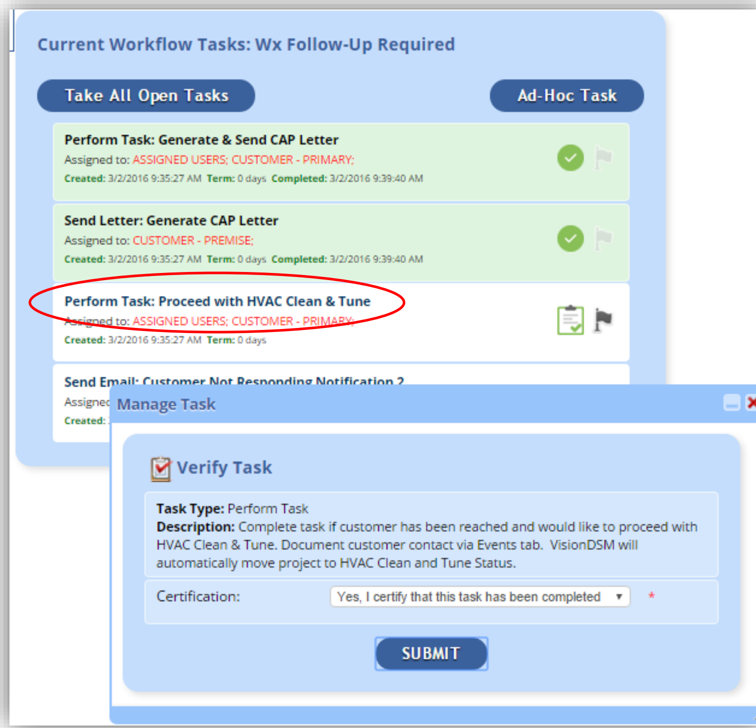
VisionDSM will automatically generate CAP Letter to be sent to Customer upon completion of this task.



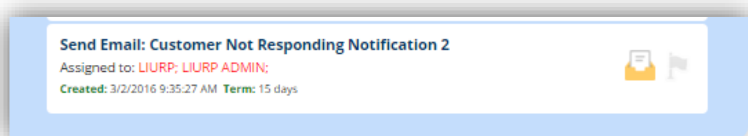
PERFORM TASK: PROCEED WITH HVAC CLEAN & TUNE

1. Select the icon to open task box.
2. *Complete task if customer has been reached and would like to proceed with HVAC Clean & Tune. Document customer contact via* **EVENTS tab.** *Project will be moved to HVAC Clean and Tune Status.*
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is ✓.

NOTE:** Selecting this task as Complete will automatically move project to **HVAC Clean & Tune Status (Section 11).



*VisionDSM will automatically send email notification to LIURP Administrator after 15 days if customer does not respond to schedule HVAC Clean & Tune. Application will then be moved to **Application Cancelled Status.***



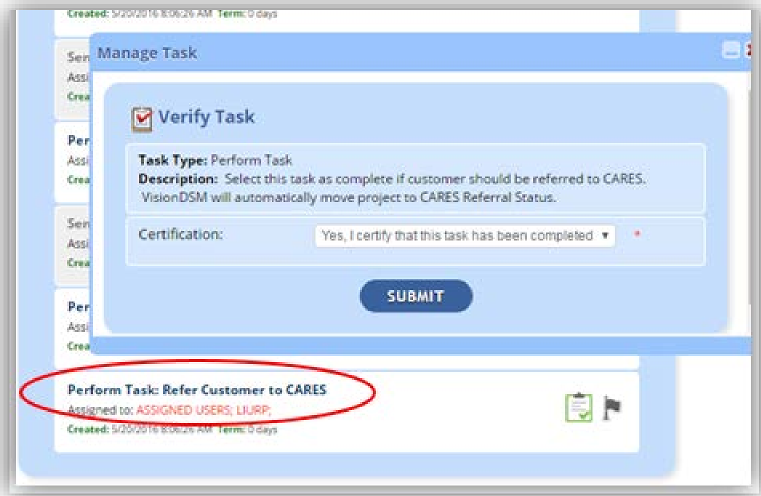
PERFORM TASK: REFER CUSTOMER to CARES

1. Select the icon to open task box.
2. *Select this task as complete if customer should be referred to CARES. VisionDSM will automatically move project to CARES Referral Status.*

3. Select **Yes, I certify that this task has been completed** in the Verify Task box.

4. Select the SUBMIT button. Icon is .

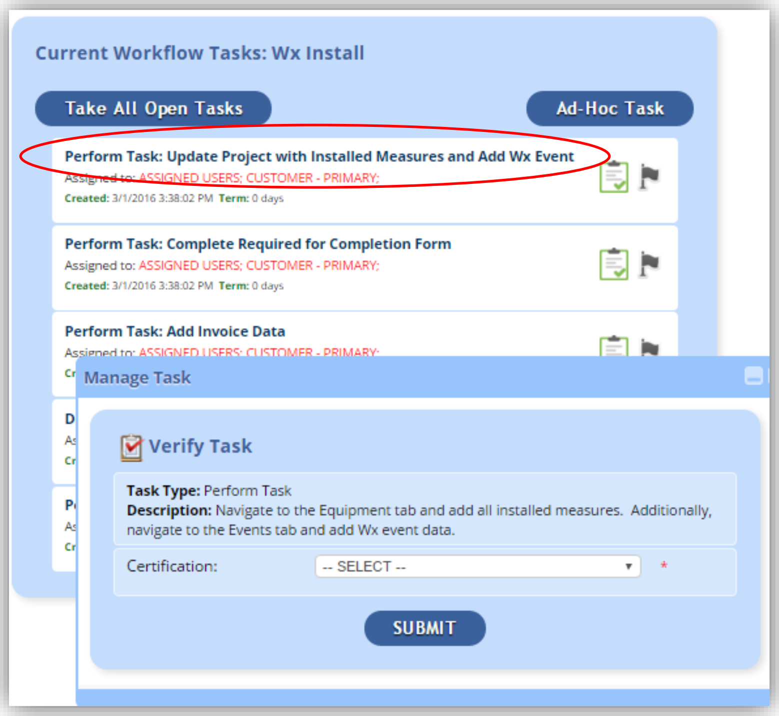
*NOTE: Selecting this task as Complete will automatically move project to **CARES Referral Status.***



13. Wx Install Status

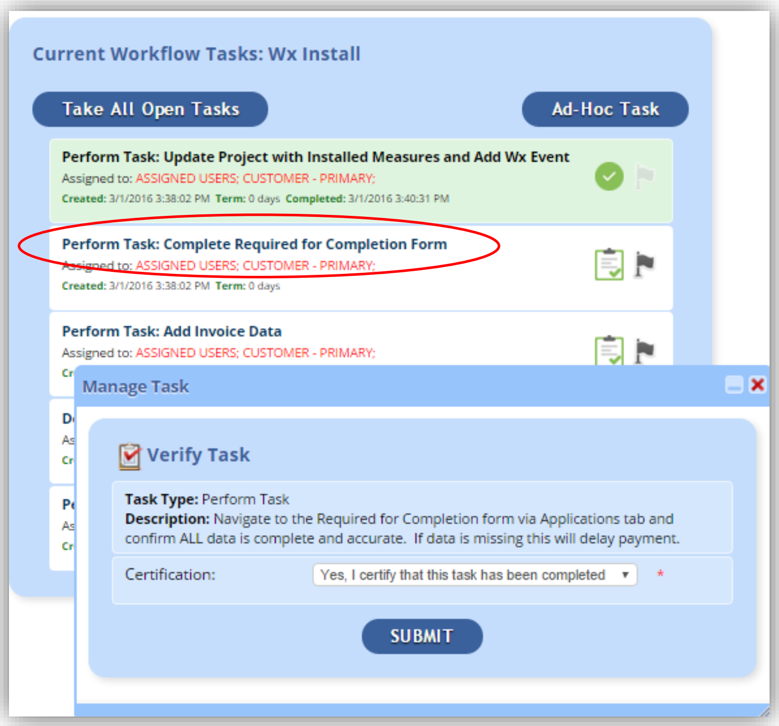
PERFORM TASK: UPDATE PROJECT WITH INSTALLED MEASURES and ADD Wx EVENT

1. Select the icon to open task box.
2. Navigate to **EQUIPMENT tab** and add all installed measures. Additionally, navigate to the **EVENTS tab** and add Wx event data.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

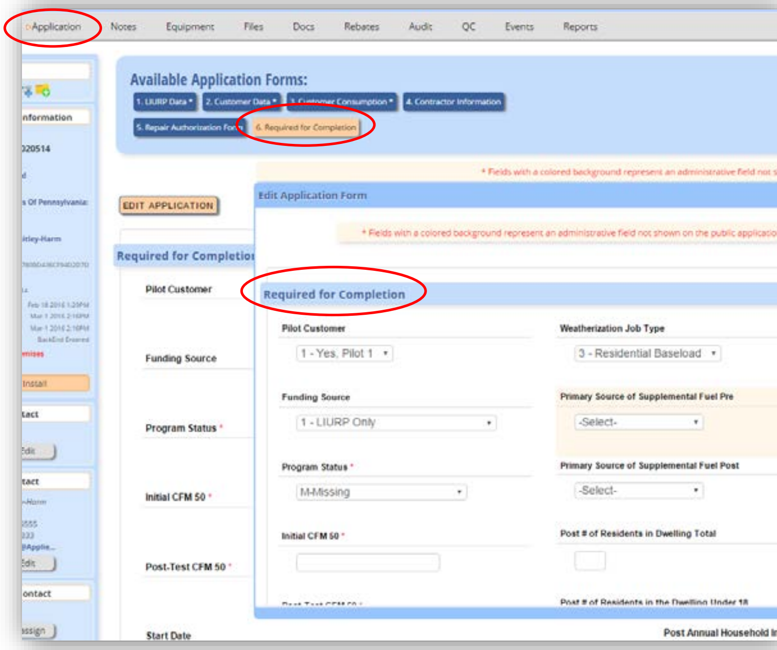


PERFORM TASK: COMPLETE REQUIRED FOR COMPLETION FORM

1. Select the icon to open task box.
2. Navigate to **Required for Completion Form** via Applications tab and confirm ALL data is complete and accurate. *If data is missing, this will delay payment.*
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

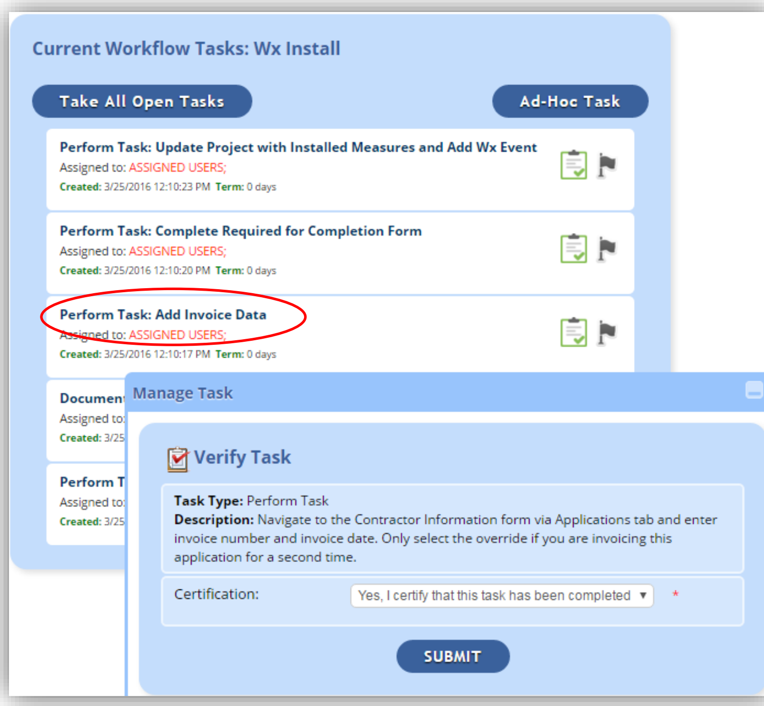


1. Navigate to the **APPLICATION** tab in the grey menu bar. Select the 6. Required for Completion form.
2. Select EDIT APPLICATION to open the **Edit Application** Form dialog box.
3. Confirm all data is complete and accurate in the Required for Completion section.
4. Scroll down and select CONTINUE to save any changes. (*Required for Completion forms fields will now display).*
5. Navigate back to **Workflow tab.**



PERFORM TASK: ADD INVOICE DATA

1. Select the icon to open task box.
2. Navigate to **Contractor Information Form** via Applications Tab and enter invoice number and invoice date. Only select the OVERRIDE if you are invoicing this application for a 2nd time!
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .



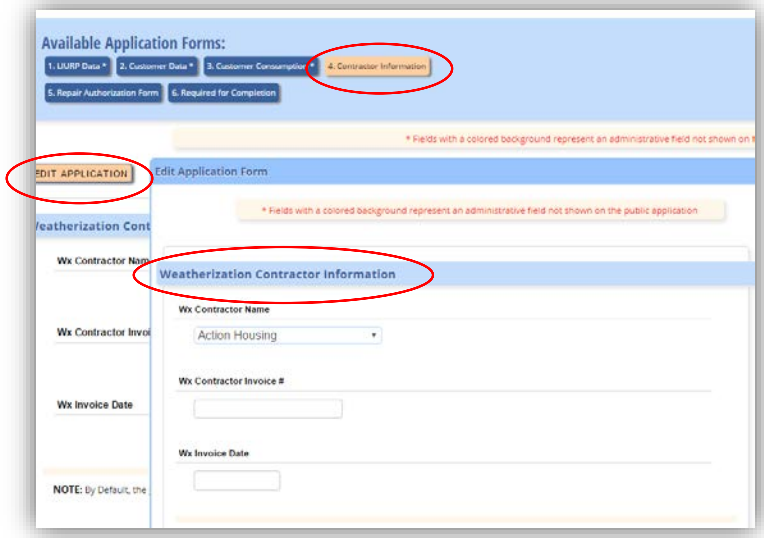
1. Navigate to the **APPLICATION** tab in the grey menu bar. Select the 4. Contractor Information form.

2. Select EDIT APPLICATION to open the **Edit Application** Form dialog box.

3. In the Weatherization Contractor Information section, enter the invoice # and date in the **Wx Contractor Invoice #** and **Wx Invoice Date fields.**

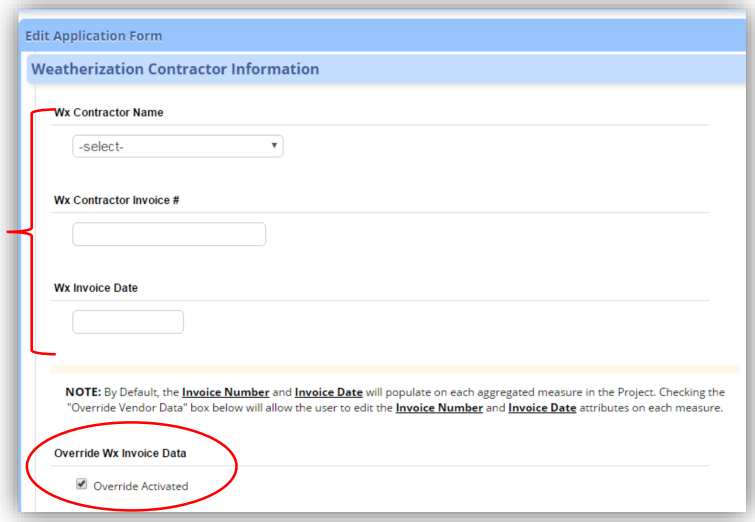
4. Scroll down and select CONTINUE to save any changes. (*Required for Completion forms fields will now display).*

5. Navigate back to **Workflow tab.**



When to use 'Override Wx Invoice Data':

If you are going to invoice CPA for this project a 2nd time, you will need to return to the Weatherization Contractor Information section

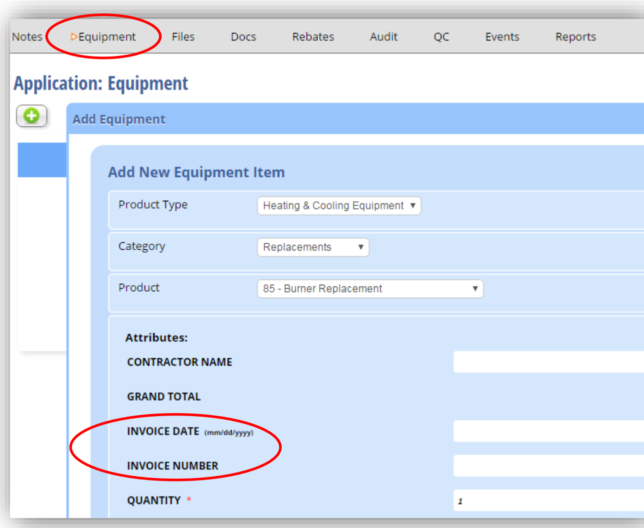


1. Select EDIT APPLICATION to open the **Edit Application** Form dialog box.

2. In the Weatherization Contractor Information section, enter the invoice # and date in the **Wx Contractor Invoice #** and **Wx Invoice Date fields.**

3. **Then check the OVERRIDE ACTIVATED checkbox** – this will prevent the invoice # and date on original invoice from being automatically associated with any NEW measures that are entered in the system!

4. Scroll down and select CONTINUE to save this information.



For any additional Measures entered:

*Please navigate to the **EQUIPMENT** tab and manually enter the invoice # and date to those new measures as well.*

See Section 4. How to add Measures

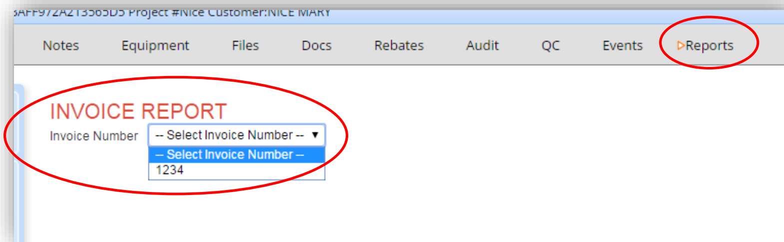
IMPORTANT NOTE: ***Before performing the DOCUMENT UPLOAD task, you must download the Final Invoice Report:***

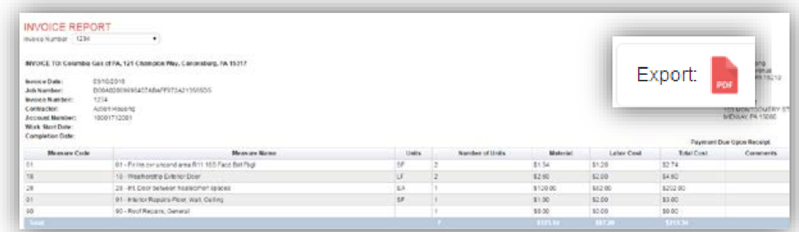
1. Navigate to the **REPORTS** tab as shown. Select **Invoice #** from drop down field.

   NOTE: *If you invoiced twice, select the appropriate invoice.*

2. Report is now displayed. Select the Export button in the upper right hand of the page view to download and create PDF version of the report.

3. **Contractors MUST save the Report and continue with Document Upload instructions below.**





Prior to uploading your FINAL Report, please make sure any changes needed are made so that the CORRECT INVOICE to be paid is uploaded in the task below.

If the Invoice Report is NOT correct, please navigate to the Equipment tab and make appropriate changes to the Measures and 'reopen' the corrected Report from the Reports tab.

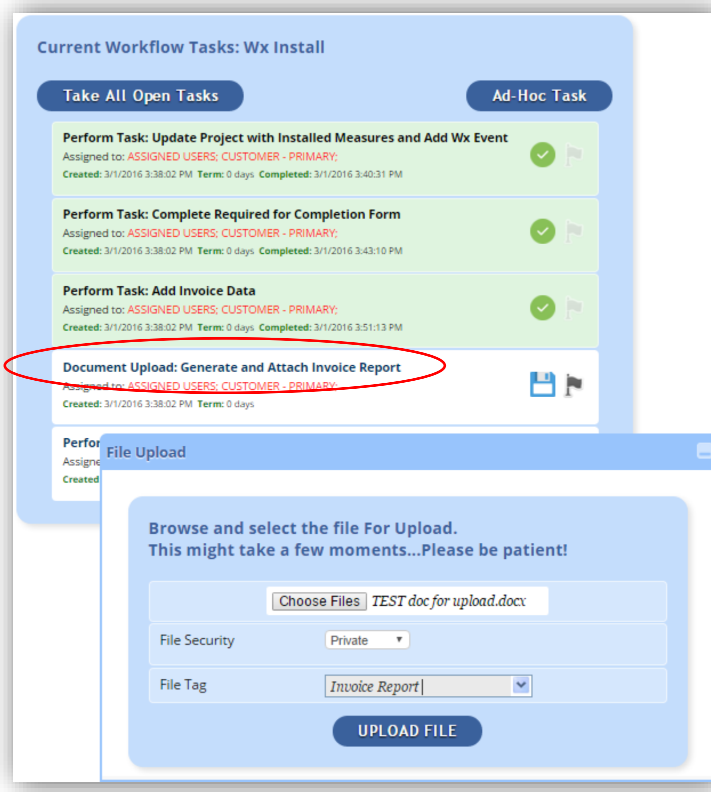
DOCUMENT UPLOAD: GENERATE AND ATTACH INVOICE REPORT

1. Select the icon to open File Upload box.
2. Select the Choose File button and locate Contractor Invoice / Store Receipt.
3. Select the Open button.
4. Select in **File Security** field.

   Note: *Options are Public and Private (preferred)*

5. Make appropriate selection.
6. Select in **File Tag** field and assign File Name to the upload.
7. Select the UPLOAD FILE button. Icon is now .

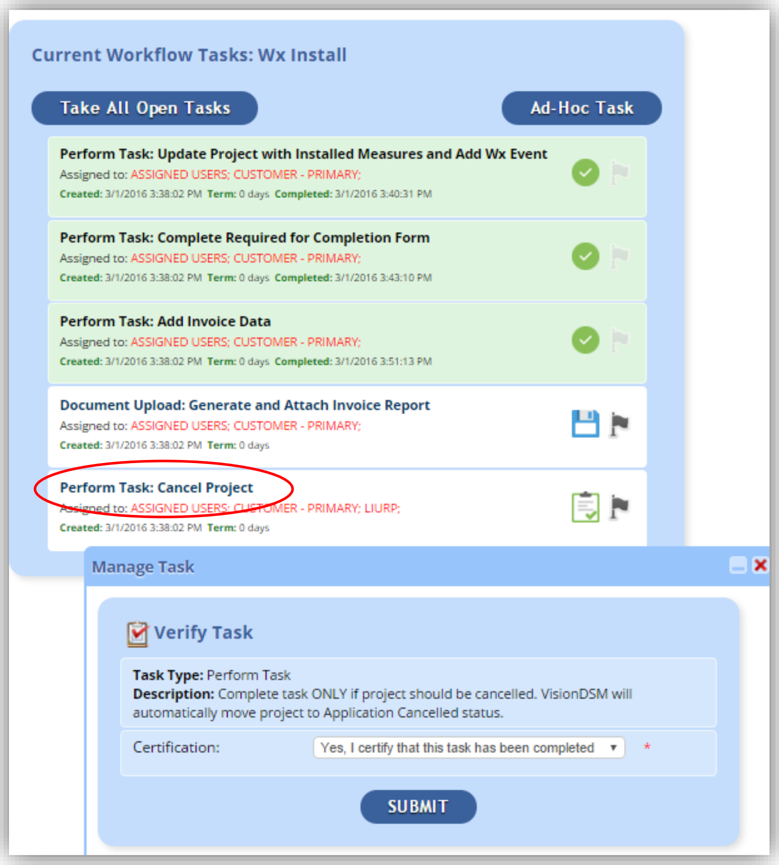
NOTE: *Selecting this task as Complete will automatically move project to* ***Application Completed Status.***



PERFORM TASK: CANCEL PROJECT

1. Select the icon to open task box.
2. Complete task ONLY if project should be cancelled. VisionDSM will more project to Application CANCELLED status.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

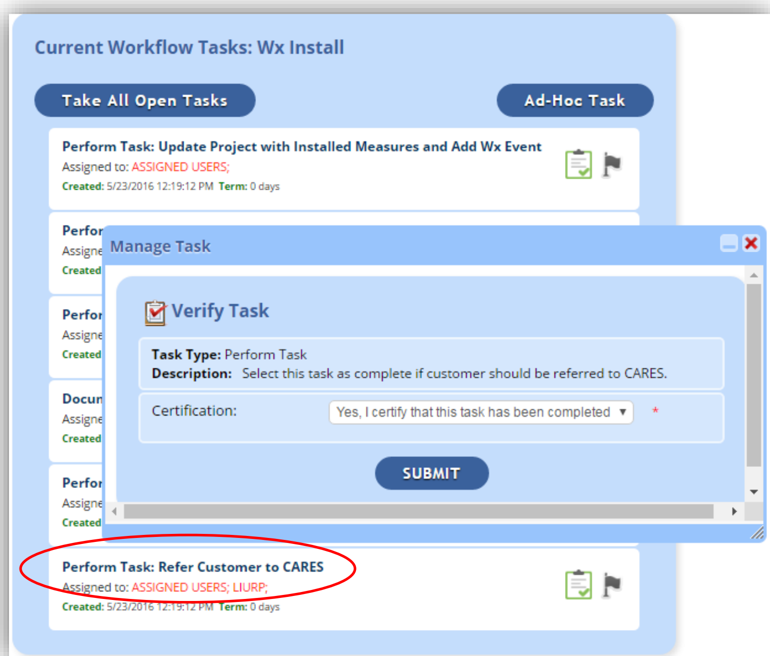
NOTE:** Selecting this task as Complete will automatically move project to **Application Cancelled Status.



PERFORM TASK: REFER CUSTOMER to CARES

1. Select the icon to open task box.
2. Select this task as complete if customer should be referred to CARES. VisionDSM will automatically move project to CARES Referral Status.
3. Select **Yes, I certify that this task has been completed** in the Verify Task box.
4. Select the SUBMIT button. Icon is .

NOTE:** Selecting this task as Complete will automatically move project to **CARES Referral Status.

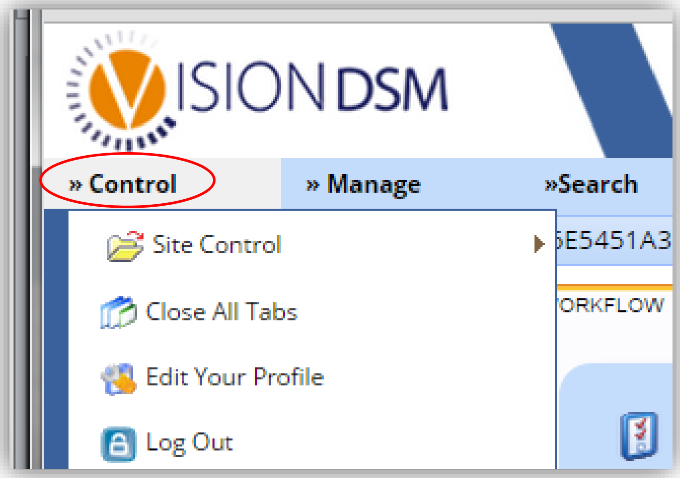


14. Logging out in VisionDSM

4. Navigate to the ***Control tab*** under the VisionDSM logo in the upper left corner of the 'Project Quickview' screen.

5. Select Control tab and then select **CLOSE ALL TABS.**

6. Select Control tab again and select **LOG OUT**.



15. CPA Contact Information

For questions regarding VisionDSM and the **CPA LIURP Program,** please contact:

Jacqueline Martin
JACQUELINEMARTIN@NISOURCE.COM