

# How to Conduct a HELP Home Energy Assessment:

## A step-by-step guide for HELP Home Energy Assessors (HHEAs)

### Before the Visit

- Review appointment details (address, customer name, eligibility – CAP or SLP)
- Submit spec sheets for pre-approval to [aepohiohelp@resource-innovations.com](mailto:aepohiohelp@resource-innovations.com) for any measures that were not purchased through the portal (<https://aep-ohio-contractor-portal.com/>) or differ from the listed models
- Be prepared with a working knowledge of the assessment process and expected standards as outlined in the [Program Manual](#).
- Ensure all tools, equipment (Direct Install measures listed in Step 4), and forms are packed:

Installation Tools	Documentation Tools	Documentation
<ul style="list-style-type: none"> <li>• Step ladder</li> <li>• Wrench</li> <li>• Screwdriver</li> <li>• Measuring tape</li> <li>• Utility knife</li> <li>• Flashlight</li> <li>• Teflon tape</li> <li>• Thermal gun</li> </ul>	<ul style="list-style-type: none"> <li>• Computer or iPad if entering data directly into MAT: <a href="#">Energy Suite - Program Information</a></li> <li>• Clipboard &amp; writing utensil if using printed forms</li> <li>• Charged phone or camera to take pre &amp; post install photos</li> </ul>	<p><b>Printed copies or digital access to:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Energy Assessment Report</a></li> <li>• <a href="#">Assessment &amp; Measure Workbook</a> (if opting to collect measure data via the printed form)</li> </ul>

### Step 1: Arrival & Introduction

- Greet the customer and explain the purpose of the visit
- Briefly outline the assessment process
- Obtain verbal consent to begin walkthrough

### Step 2: Walkthrough & Complete Energy Assessment Report

- Use the Energy Assessment Report to guide your walkthrough. For each space, look for opportunities to install program-approved measures.
  - **TIP:** For unclear measure eligibility, mark as Follow-Up Needed
- Mark eligibility and quantity for each measure in the Energy Assessment Report

### Step 3: Review with the Customer

- Review the completed report with the customer
- Explain the measures they qualify for and any follow-up items
- Have the customer check the boxes for accepted measures and sign the program agreement

### Step 4: Installation & Data Collection

- Install all eligible & accepted Direct Install (DI) measures
- Collect all required measure data as outlined in the MAT or Assessment & Measure Workbook
  - For retrofit measures, gather current unit information (nameplates, manufacturer, serial no., etc.) where applicable
- Photograph pre & post installed DI measures
- Photograph eligible pre-installed Retrofit measures where applicable (refrigerator, water heater, etc.)

Direct Install Measures	Retrofit Measures
<ul style="list-style-type: none"><li>• Advanced Tier 2 Power Strip</li><li>• ENERGY STAR® LED Bulbs</li><li>• LED Outdoor Flood Lights</li><li>• Low Flow Aerators</li><li>• Low Flow Showerheads</li><li>• Standard Flow Showerhead with TSV</li><li>• *Wi-Fi Enabled Smart Thermostat</li><li>• Pipe Wrap Insulation</li><li>• ENERGY STAR® Air Purifier</li></ul>	<ul style="list-style-type: none"><li>• Air Sealing</li><li>• Duct Sealing</li><li>• ENERGY STAR® Freezer</li><li>• ENERGY STAR® Refrigerator</li><li>• ENERGY STAR® Heat Pump</li><li>• ENERGY STAR® Mini-Split Heat Pump</li><li>• ENERGY STAR® Water Heater</li><li>• Insulation (Attic, Floor, Wall, Basement, Sidewall, Rim Joist)</li></ul>

\*If the customer qualifies for a new HVAC system, the Wi-Fi-enabled smart thermostat will be installed during the follow-up visit, in coordination with the HVAC installation.

### Step 5: Upload Data & Notes

- Enter all collected data into the MAT ([Energy Suite - Program Information](#)) either in real-time during the assessment or promptly after the assessment (within 30 business days of completion)
- Double-check for accuracy and ensure all fields are completed in accordance with program guidelines
- Submit the assessment for review and approval by Resource Innovations

### Important Reminders

- HHEAs must install everything themselves; measures are not to be left behind with the customer to install.
- Remove old equipment unless customer requests to keep certain item(s) (e.g., power strip, showerhead, etc.)
- SLP customers will be responsible for approximately 35% of the cost of each retrofit measure identified. It is important to point out the estimated cost range listed in the assessment report during the review with the customer. When discussing these measures, emphasize that by checking the acceptance box, they are simply expressing interest in moving forward with the next step — a contractor visit. The Installation Contractor will perform a thorough assessment and provide a finalized invoice. At that point, the customer can decide whether or not they'd like to proceed with installation.

## Important Reminders (cont.)

- In unsafe situations, assessors should use their discretion to walk away if they feel threatened or the environment is hazardous (e.g., aggressive behavior, pets, gas leaks, mold, excessive clutter). If work cannot be safely completed, inform the client on-site and follow up with written documentation. If the customer can remedy the walkaway issue, the HHEA may return and complete the work.
- If you encounter an urgent issue during an assessment please contact Dani Kissel, Program Manager, directly at 513-207-8420. For non-urgent questions or concerns, please email the program mailbox at [aepohiohelp@resource-innovations.com](mailto:aepohiohelp@resource-innovations.com) for assistance.

## Important Reminders

- Arrive on time for all scheduled appointments
- Dress appropriately and maintain a clean, professional appearance
- Represent the program in a respectful and professional manner at all time
- Bring all necessary tools and materials to perform direct installs efficiently
- Have a reliable method to record and capture measure data (e.g., computer, phone, paperwork)
- Communicate clearly and respectfully with customers
- Follow safety protocols and use discretion in unsafe situations
- Document and report any barriers to completing work