

PTCS

Performance Tested
Comfort Systems

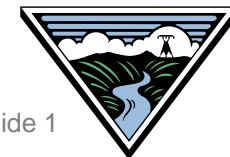
Site Registry Improvements: Progress Report

BPA Energy Smart Awareness Brown Bag

November 12, 2009

Presenters:

Sarah Moore, BPA Energy Efficiency Residential Sector Lead
Andres Morrison, Ecos Consulting



Agenda

- Introduce the improved PTCS Web site and database
 - Functions and changes
- Benefits of the updated resource
 - For Utilities
 - For Contractors
 - For Homeowners
- What we plan for the future



Current challenges

- Too much time from when the form is faxed to when the job shows up on the database.
- No communication loop between PTCS team, utility and contractors.
- Utility staff has to check status of a job and relay information to contractor.



Purpose and goals of improved Web site

- Better communication between all parties:
 - Utilities
 - Contractors
 - PTCS team
- Easier submittal of forms by contractors
- Consistent results regarding “accepted” and “rejected” status.



Changes ahead

- Oct. 1, 2009 BPA Implementation Manual requires that a measure be submitted, entered into the database and labeled as 'accepted.'
- Greater interest in energy efficiency and weatherization is driving increased volume of PTCS jobs. An improved database is needed to prevent a bottleneck.



Solving the challenges

- Improved communication method
- Faster response times
- Easier data transmission method

We needed a better way to communicate between all parties involved: utilities, contractors, BPA PTCS team and homeowners.



The improved Web site

- Same web address: www.ptcsnw.com
- Allows contractors to create their own login and view the status of their jobs
- Creates a faster method for submitting corrections or missing information
- Allows contractors to enter jobs into the database



Utility functionality

- View list of jobs in your territory
 - Customer name and address (as on form)
 - Company name
 - Status of job
- Detailed view of each job
 - More intuitive and user-friendly format
 - More versatile reporting functionality



Utility functionality: creating a login

- <http://v2.ptcsnw.com>
 - Select “register” in upper right hand corner
 - Select “utility” as group
 - Your login will be activated by the PTCS team within 12 hours



Utility functionality: "Measures"

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Home
Contractors
Utilities
Homeowners
About the Program
My Account
Contact
Admin

Welcome Andres | [Logout](#)

Utility Measures

Start Date:
End Date:

Show Accepted Measures Only
Refresh

1 of 1 | 100% | Find | Next | Select a format | Export

PTCS Measures By Utility

Utility:
 Website: <http://www>

Site ID	Site Address	Site City	Site State
MeasureID	Measure Type	Measure Entered	Status
100048	1212 Main	Monmouth	OR
100087	PTCS Duct Seal	10/29/2009	Accepted
100059	Paradise Island	Amazon	OR
100107	PTCS Duct Seal	11/2/2009	Accepted

Total Measures: 2



Utility functionality, continued

- Filter job list by date range
- View jobs by technician and/or by company
 - Will be added prior to launch
- Filter by 'accepted only'
- Ability to export into various formats (Excel, PDF, Word, etc.)



Contractor functionality

- Ability to create their own login and access the database
- Ability to sign up and pay for classes online
- View a list of their jobs, with status and detailed information regarding 'rejected' or 'pending' measures
- Submit jobs directly through the Web site, entering the pertinent information and immediately knowing the status of the job



Contractor functionality – continued

- Jobs entered through the Web site are validated by the system, giving the contractor immediate feedback regarding the job:
 - Reviewed and accepted
 - Reviewed, rejected for specific reasons:
 - Contractor will know immediately why the job does not pass
 - Contractors can re-submit a job with items corrected



General functionality

- Address verification and normalization
- Mailing address fields if different from physical address
- View multiple types of measures at single site address (for utilities)
- Duplicate prevention (by address verification)



Communication

- PTCS team will issue a bi-monthly newsletter
 - Changes in the program
 - Upgrades to system and delivery dates
 - Trends found in QA
 - Upcoming training events
- For contractors and utilities



Deploying the improved Web site

- Selecting contractors for online job submittal
 - Contractors willing to test system
- Thurs., Nov. 12 push live Beta version
- Weekly releases of site with bug fixes
 - Continue Beta testing through Dec. 31
- Full site launch and rollout Jan. 1, 2010



Timeline

- Nov. 12- BPA Energy Smart Awareness brown bag for utilities
- Nov. 16- Webinar for contractors / utilities (tentative)
- Nov. 20, Dec. 4, and 11 – Re-releases (bug fixes)
- Dec. 14 – Testing data removed
- Dec. 14 and 21 Webinar for contractors (tentative)
- Dec. 28 – Jan. 1: Data migration
- Jan. 1: New database & website launch



Additional updates in the works

- Quality Assurance (QA) reporting structure for utilities
 - See what jobs have been inspected and what the results were.
 - See calendar of upcoming QA inspections
- Email notifications when job status changes
- Email results regarding WA inspections



Questions?

