

# Upload a Rating File to Green Energy Compass: Pennsylvania

## Overview: Steps for Job Submittal to Green Energy Compass

1. Login to Compass.
2. Add a rating.
3. Verify Building Model Information.
4. Choose Projected or Completed Rating.
5. Upload required REM/Rate .blg file.
6. Export required .mdb file from REM/Rate (*version 13 or higher*).
7. Upload required .mdb file.
8. Certify ENERGY STAR eligibility.
9. Enter Certificate of Occupancy Date.
10. Add note to Notes field, if desired.
11. Submit the rating to the program.

## Login to FirstEnergy New Homes PA Green Energy Compass

Dashboard Ratings Help Logout

Met-Ed®  
Penelec®  
Penn Power®  
West Penn Power®  
FirstEnergy Companies

User: [FirstEnergy Rater](#), FirstEnergy Demo

**Login**

Please enter your email address and password.

Email:

Password:

[Forgot your password?](#)

**Login**

**Welcome to Compass!**

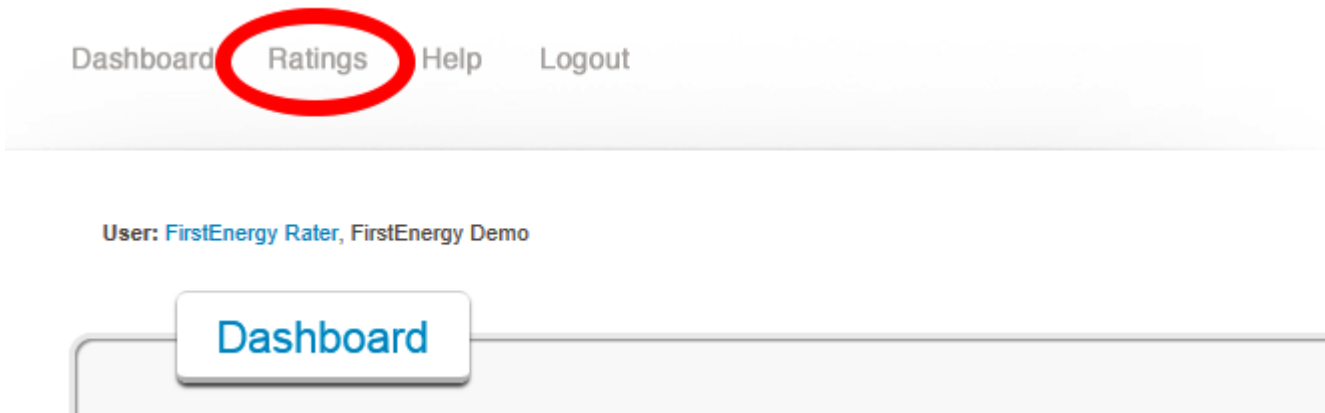
Compass tracks and reports projected and completed ratings for homes entered into the FirstEnergy Energy Efficient New Homes Programs. Use Compass to create homes, upload ratings, and determine your eligibility for FirstEnergy incentives.

Powered by  COMPASS

<https://fe-newhomes-pa.greenenergycompass.com>

Use your email and the password provided upon program enrollment.

## From the Dashboard, go to the Ratings list



After a successful login, you will be on the Dashboard for your Green Energy Compass account.

Select the **Ratings** List

## Add a new rating, or select from the existing ratings in your list

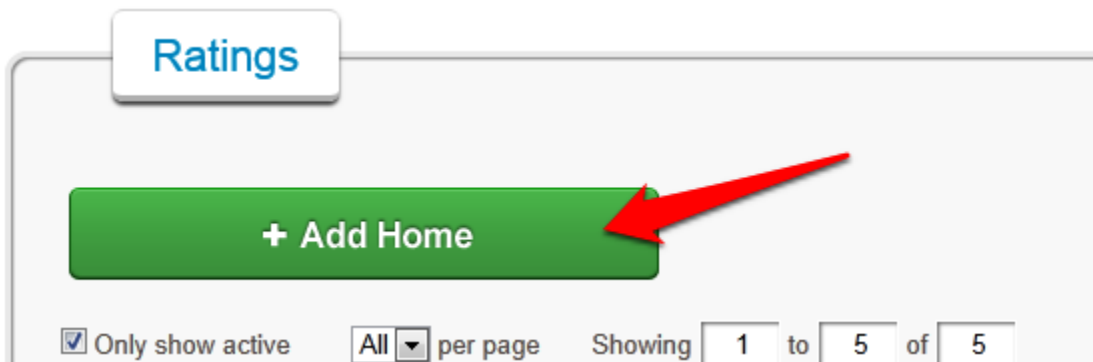
The screenshot shows the 'Ratings' page. At the top left, there is a 'Ratings' tab. Below it is a green button labeled '+ Add Home' with a yellow circle containing the number '2' next to it. To the right of the button are links for 'Additional Resources', 'Upload a Rating File to GECO', and 'Instructions for exporting from REM/Rate'. Below these links are filters: a checked box for 'Only show active', a dropdown menu set to 'All' per page, and a pagination indicator 'Showing 1 to 5 of 5'. A search field with a 'Search' button is also present. The main content is a table with the following data:

Rating	HERS Index	Rating Status	Updated
<b>TESTHOME</b> New Ave., Turner, PA 16801	121	Completed Rating Submitted	7 days ago
<b>Test ID</b> Some Road, Erie, PA 16501		Completed Rating Started	30 days ago

A yellow circle containing the number '1' is positioned to the left of the first row of the table.

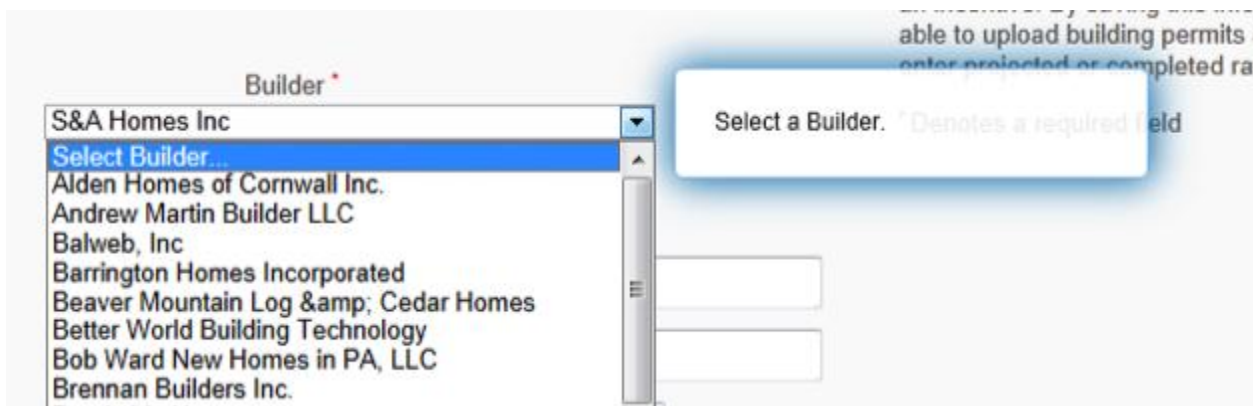
1. If this rating has been previously entered, or partly entered into Compass, click the **Rating Name**  
*Quick tip:* If you have received an email that your builder has created a reservation for this home, enter the confirmation code into the search field to locate the rating.
2. If this rating is not on the list, click **Add Home**

## Add a Rating



Click the green **Add Home** button.

## Select a builder from the list



## If your builder is not listed



Any builder not listed here should create a profile at <http://www.energysavepa-newhomes.com>

## Enter basic rating information

**Add a Home**

Entering the address is the first step in submitting for an incentive. By saving this information, Builders are able to upload building permits and Raters are able to enter projected or completed ratings.

\* Denotes a required field

Builder \* PSD Demo Builder

Electric Utility \* Penelec

Home Name/ID \* 123\_Test\_Home

Address \* 297 1/2 Chestnut St.

City \* Meadville

State \* Pennsylvania

Zip \* 16335

Weather Station \* PA - Erie

County \* Crawford

Planned Completion Date \* 7/30/2013

Conditioned Area (sq ft) \* 2100

Home Sub-Type Single Family Detached

Fill all required field with the correct information for the rating. Be sure all information *exactly* matches the information contained in the building model. *Note: We encourage copy/paste from the REM file to the required field in Compass. This will ensure the information is consistent.*

## Enter Reservation Information & Advanced Efficiency Features

**Reservation Information**

1 Reservation Level: ENERGY STAR

Building Permit Date: 06/17/2013

**Advanced Efficiency Features**

2 Primary Heating Fuel:  What is the primary heating fuel for the home?

Additional Certificates: PHIUS

Two part foam insulated walls: No

Double wall construction: No

Ground source heat pump: No

Air source heat pump: No

ICFs: Yes

SIPs: No

On site generated energy: Solar

Thickness of rigid foam insulation (inches): 3

**Administrative Use Only**

Utility Customer ID:

Cancel **3** Save and Continue

1. Enter the Building Permit Date.
2. (Optional) Complete Fields for any Advanced Efficiency Features. Hold the cursor over any field for additional instructions.
3. Click **“Save and Continue”**

## Make sure you've entered all relevant data for the rating

**123\_Test\_Home**

Home Name/ID: 123\_Test\_Home

Home Address: 297 1/2 Chestnut St.  
Meadville, PA 16335

Builder: PSD Demo Builder

Builder Phone: (814) 282-3689

Builder Email: marblaster@psdconsulting.com

Square Footage: 2,100 sq ft

Planned Completion Date: 7/30/2013

Electric Utility: Penelec

Confirmation Code: LMH118

**Reservation Information**

Reservation Level: ENERGY STAR

Building Permit Date: 7/30/2013 12:00:00 AM

▶ **Advanced Efficiency Features**

▶ **Administrative Use Only**

[Edit Basic Data](#)

### Does the new rating include all the following fields?

Appropriate builder selected.

Appropriate FirstEnergy Operating Company selected (Penelec, Met-Ed, Penn Power, West Penn Power).

Building address, square footage information submitted matches REM/Rate Model data.

Planned Completion Date, Conditioned Area and Building Type entered.

## Enter Rating Details


**123\_Test\_Home**

Home Name/ID: 123\_Test\_Home  
Home Address: 297 1/2 Chestnut St.  
Meadville, PA 16335  
Builder: PSD Demo Builder  
Builder Phone: (814) 282-3689  
Builder Email: marblaster@psdconsulting.com

Square Footage: 2,100 sq ft  
Planned Completion Date: 7/30/2013

### Ratings

Type	Status	Contact	Date
ENERGY STAR	Projected Rating Ready	FirstEnergy Demo	7/30/2013



Click the magnifying glass to go to the **Rating Details** screen



## Choose Projected or Completed Rating

**Rating Details**

Program: First Energy  
Builder or rater: FirstEnergy Demo  
Created By: FirstEnergy Rater  
Creation Date: 7/5/2013  
Confirmation Code: WFN310  
Type: ENERGY STAR  
Status: Projected Rating Ready - Open - 0 days old



[Edit Basic Data](#)

### Stages



**Rating Status History**

Status	Modified By
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Is the new submittal a *Projected* or *Completed* Rating (choose one)?

Current Home: TEST Home User: FirstEnergy Rater, FirstEnergy Demo

### Create Projected Rating

1

If all diagnostic testing is complete, please click [Cancel](#) and begin a Completed Rating.

If this home is in the plan stage or diagnostic testing has not yet been completed, please click *Save and Continue* to confirm that you wish to start the Projected Rating.

2

[Cancel](#)

Powered by 

If the submittal is at the projected stage and diagnostic testing has been completed, select **Projected Rating**.

1. Confirm you wish to **Create Projected Rating**, then Click **Save and Continue**.

Current Home: TEST Home User: FirstEnergy Rater, FirstEnergy Demo

### Create Completed Rating

1

If this home is in the plan stage or diagnostic testing has not yet been completed, please click [Cancel](#) and begin a Projected Rating.

If all diagnostic testing is complete, please click *Save and Continue* to confirm that you wish to start the Completed Rating.

2

[Cancel](#)

Powered by 

If the submittal is a completed rating, and diagnostic testing has been completed, select **Completed Rating**.

1. Confirm you wish to **Create Completed Rating**, then Click **Save and Continue**.



## Upload a Building Model REM/rate .blg file

The screenshot shows a web interface for uploading files. At the top is a grey bar with the word "Files". Below it, there are several fields: "File Type:" with a dropdown menu, "Description:" with a text input field (max size: 10MB), "Private:" with a checkbox, and "Upload:" with a "Browse..." button and an "Upload" button. A table below shows columns for "File Name", "Description", and "Date Uploaded". The "File Type" dropdown menu is open, showing options: "Midpoint Thermal Bypass Checklist", "Rating (.blg)\*", "Rating Export File (.mdb)\*", "QA Review (.pdf)", "Photo", "Plans & Specs", "Certificate of Occupancy", and "Other". A yellow circle with the number "1" is next to the dropdown menu. A yellow circle with the number "2" is next to the "Browse..." button. A yellow circle with the number "3" is next to the "Upload" button. A note at the bottom left says "\* Indicates a Required File".

1. Select Rating (.blg) from the file type list
2. Browse for the building model file and select the appropriate (projected or confirmed) model.
3. Click **Upload**

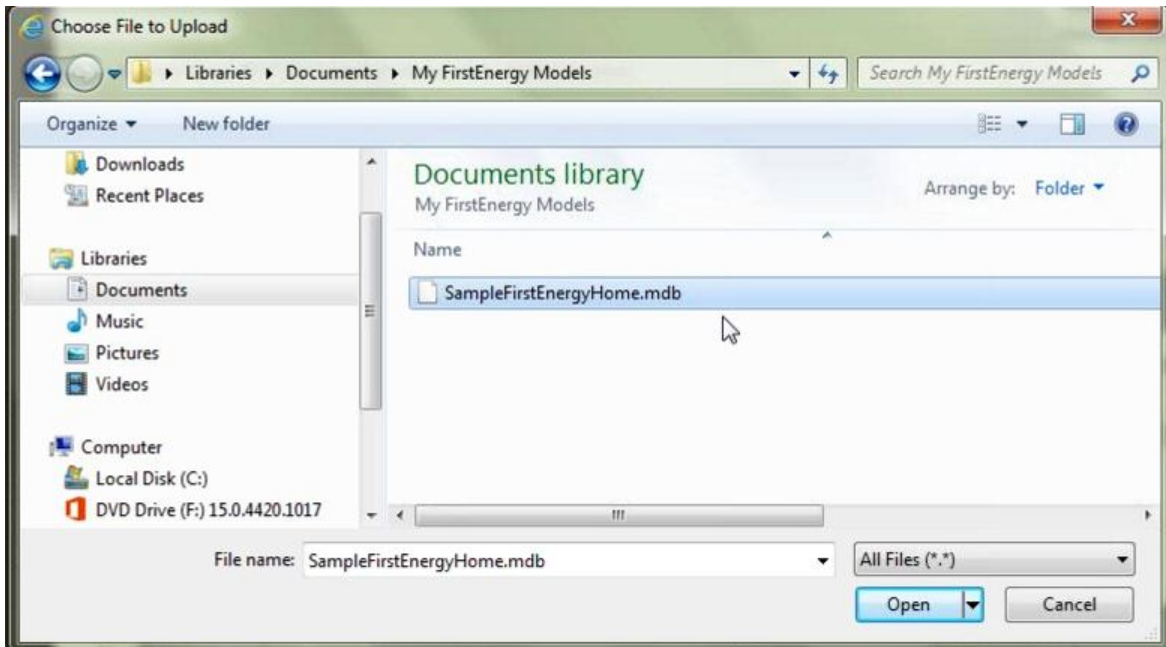
## Upload a Rating Export file (.MDB)

The screenshot shows a web interface for uploading files. At the top is a grey bar with the word "Files". Below it, there are several fields: "File Type:" with a dropdown menu, "Description:" with a text input field (max size: 10MB), "Private:" with a checkbox, and "Upload:" with a "Browse..." button and an "Upload" button. A table below shows columns for "File Name", "Description", and "Date Uploaded". The "File Type" dropdown menu is open, showing options: "Midpoint Thermal Bypass Checklist", "Rating (.blg)\*", "Rating Export File (.mdb)\*", "QA Review (.pdf)", "Photo", "Plans & Specs", "Certificate of Occupancy", and "Other". A yellow circle with the number "1" is next to the dropdown menu. A yellow circle with the number "2" is next to the "Browse..." button. A note at the bottom left says "\* Indicates a Required File".

1. Select the Rating Export File field type
2. Browse to the correct .mdb (projected or confirmed) for this project

If you have not yet created the export file, instructions can be found here: [Instructions for exporting from REM/rate](#)

## Locate the .mdb (access database) file to upload



## Upload a Rating Export file (.MDB)

Description:  (max size: 10MB)

Upload:

Click **Upload**

Compass will import and process the rating information

## In the case of reported REM/Rate Validation Errors...

### REM/Rate Validation Errors

The REM/Rate file was uploaded successfully but failed validation for the following reasons:

- Builder not found
- Rater Organization does not match current user
- Rater does not match current user
- Address does not match current rating.
- Not a confirmed rating

Does the building model contain **COMPLETE & ACCURATE** information for this home and **EXACTLY MATCH FENH** Compass?

Builder information

Rating Organization Information  
Rater Information  
Property Address Information

## Be sure you have both the .BLG and .MDB

### Files

File Type:  Description:  (max size: 10MB)

Private:  Upload:

File Name	Type	Description	Date Uploaded	
SampleFirstEnergyHome.blg	Rating (.blg)	Sample 1 EnergyHome	07-15-13 04:22 PM	
SampleFirstEnergyHome.mdb	REMRate Model	SampleFirstEnergyHome	07-15-13 04:21 PM	

\* Indicates a Required File

Before submitting a rating, two files are required:


1. REM/rate building file (.blg)
2. Export Database (.mdb)

## ENERGY STAR Confirmation and Certificate of Occupancy Date

### Incentive Eligibility

Completed Rating

HERS Index: 53  
ENERGY STAR: No  
Savings over Code: 35.4 %  
CO Issue Date: -



Click the **Edit** button on the Completed Ratings screen under the uploaded files

Edit Completed Rating

Completed:

HERS Index: 53

ENERGY STAR:  1

Savings Over Code: 35.4 %

CO Issue Date:  2

Date of issuance of Certificate of Occupancy (CO) (required).

July 2013						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27

Cancel
Save and Continue 3

1. Is the **ENERGY STAR** checkbox selected? (*Mandatory*)
2. Is the **CO Issue Date** entered (Confirmed/Completed ratings only)?
3. Click **Save and Continue**.

## Add Notes to the Notes Field

Notes

▼ **Add Note**

Note:

► **Add Note**

**FirstEnergy Rater**  
7/11/2013 9:57:14 AM      **\*\*\*Walkout Basement\*\*\***

Should the program be aware of any special considerations about this home?

If yes, please add information to the **Notes** field.  
 Saved notes will indicate time and date for program staff.

## Submit the Rating to the Program for Review



Last step: click **Submit for Review**