



Multifamily Energy Savings Program Eligibility Tool Guide

General Requirements

The Multifamily Energy Savings Program Eligibility Tool assists program staff in determining the most appropriate course for the customer's building. The tool should be filled out to the best of the user's abilities. Not all fields are required but each field assists program staff to determine the correct course for the customer's building. Many fields provide an "Other" option, when this is selected please provide further explanation in the "comments" area of that section.

After downloading the Eligibility Tool, save the file to your computer to ensure proper functionality. This tool uses enhanced features from a credible source that require enabling. To enable this functionality please accept the security warning(s) (i.e. "enable macros" when prompted).

Additional Information Tab

If you are unsure of a certain technology or acronym please see the Additional Info tab. This tab contains examples of equipment types and spelled out acronyms. If there is any other information you feel would be valuable to other users on the Additional Info tab please provide that information when submitting the tool.

Functionality

This tool uses enhanced features to expedite the time required for completion; some of these functions require accepting security risks (i.e. enabling macros) as explained above. The following is a list of many of the functions in this tool, their purpose and helpful hints.

1. *Reset Button*- This button will reset the entire form in case the user would like to start over or fill out a new form for a different building. The button will provide a warning to reduce the risk of inadvertently clearing the sheet.
2. *Review Button*- This button will review the form to verify all required fields have been completed. In the event that you have missed any required fields it will alert you to how many fields you have missed and display "Required Field" on the line with missing data.
 - a. *Tip*: For the quickest completion of required fields, click this button first to see which fields are required. Although this is the fastest way to complete the tool it may result in more follow-up time by Focus on Energy if additional information is necessary.
3. *Save Button*- This button will save the document to the same location that it was originally saved on your computer. It will also check the required fields and if there are any that are incomplete it will still allow the user to save, but request the form be completed before submitting to the program.
4. *Print Button*- This button will automatically print the form; it will not pull up the user's typical print command prompt.
 - a. *Tip*: To use options that are not default on your system, follow the normal printing procedure.
5. *Stop Function*- A few fields in this form will not allow the user to advance without entering valid information, this warning will pop-up with an "X".

6. *Warning Function*- Many fields in this form will warn the user of invalid data with a “!” pop-up. Any value that produces this warning is incorrect or an atypical value, you may continue without adjusting the value but this will need to be clarified with Focus on Energy.
7. *Input Message*- Fields that may not be intuitive to many users, provide an input message that will display when the user selects that cell to further clarify what is being asked for.

System Settings

AutoComplete- If cells are auto populating data you may have the AutoComplete command turned on. To solve this issue follow the following procedure:

1. Open Excel Options
2. Go to Advanced
3. Uncheck Enable AutoComplete for cell values

Form Submission

Once you have completed the requested information please submit the completed form to multifamilyprograms@franklinenergy.com. Please provide any feedback on the tool with your submitted form.