

BetterBuilt^{NW}

Performance Path Quality Assurance (QA) Overview

File QA

The File QA protocol is a streamlined process during which a QA Agent conducts a desktop review of the REM/Rate™ energy model and AXIS data entry. This process was developed and refined during NEEA's Next Step Homes pilot and is now used with each Performance Path utility program. Over time, File QA may evolve to accommodate emerging or localized practices or home configurations.

- BetterBuiltNW QA Agents conduct all File QA in Performance Path programs.
- Each Rater/Verifier receives an in-depth File QA on the first five (5) submitted homes. File QA continues at 20 percent of submitted homes if Rater/Verifier is in good standing.
- File QA may continue at 50–100 percent of submitted homes if systemic/habitual issues are identified.
- Rater/Verifier direct mentorship – The QA Agent conducts onboarding training during first five (5) File QA reviews. Additional mentorship is provided as needed.

Field QA

The Field QA protocol, including associated field data collection, is based on impactful items identified during the Next Step Homes pilot. Field QA processes have evolved, and may continue to do so over time, to accommodate emerging or localized practices or home configurations. Utilities will be notified of Field QA scheduling by a BetterBuiltNW QA Agent, and are welcome to attend. Utilities should plan to attend initial Field QA visits if the utility intends to adopt the Utility Field QA model outlined below, as these joint visits will serve as hands-on training opportunities for designated utility Field QA staff.

- Each Rater/Verifier receives Field QA on three (3) submitted homes, initially.
- The BetterBuiltNW QA Agent will work with the Rater/Verifier to identify and schedule the visits with a goal of Field QA occurring on the first three (3) submitted homes.
- Initial Field QA visits should occur as soon as logistically feasible once the Rater/Verifier begins submitting homes.

- The QA Agent will use discretion when scheduling Field QA visits to maximize efficacy of each visit.
- After the first three (3) homes, Field QA will continue at 10 percent of submitted homes by a Rater/Verifier, or at a level decided by the QA Agent, if Rater/Verifier is in good standing.
- Field QA may continue at 50–100 percent of submitted homes if systemic/habitual issues are identified.
- Rater/Verifier direct mentorship continues during Field QA as part of the onboarding training.

Utility Field QA Model

- Depending on interest and capabilities, a utility can perform Field QA. BetterBuiltNW QA Agents will orient and train utility staff on QA processes including scheduling, field data collection, diagnostic testing procedures, and data entry in AXIS.
- BetterBuiltNW QA Agents will retain responsibility for conducting Field QA on the initial three (3) homes during Rater/Verifier onboarding, regardless of whether the Rater/Verifier submitting homes has received mentoring under another utility's program. After the initial Rater/Verifier onboarding is complete, the utility may undergo additional training and orientation before assuming responsibility of Field QA. The timeline for transfer of Field QA responsibility will be negotiated as needed.
- BetterBuiltNW QA Agents will maintain contact with raters/verifiers and utility staff conducting Field QA to keep apprised of upcoming homes and Field QA opportunities, and in case assistance is needed.