

# Virtual Energy Audit and Assessment Guidelines



**ASSESS**  
virtually  
**UNDERSTAND**  
your building  
**GET**  
results

## Identify energy savings solutions virtually

Virtual energy audits and assessments can help you meet your energy efficiency goals while minimizing or eliminating the need for a consultant to visit your building. Working closely with your energy consultant, you will provide information about your building's energy performance to help your energy consultant better understand your building and identify opportunities for energy savings. Virtual energy audits and assessments are a great way to get a deeper understanding of how your building performs and operates by becoming the eyes and ears of the energy auditor.

### How it works

- **Planning Call** – Your service provider will ask you about your building and your energy efficiency goals. They will help you decide whether a virtual audit and assessment is right for you.
- **Facility Interview** – Next, your service provider will determine what data is needed to complete your energy analysis. You will work together to gather important information and learn about the different energy systems in your building such as HVAC or lighting.
- **Virtual Walkthrough Planning** – Prior to conducting your virtual walkthrough, your service provider will make sure you are prepared for your virtual walkthrough by discussing any materials, tools, or space access needed for successful completion.
- **Virtual Walkthrough** – Bring your service provider on a guided tour of your building using videoconferencing on a smart phone or tablet.

### What you will need

- Information about your building such as utility bills, drawings, or site plans. The more information you can provide, the better!
- Staff who are knowledgeable about your building and the equipment inside it. This may be a facility manager, head custodian, HVAC technician, electrician, or building manager.
- The ability to join a video conference via a connected smart phone or tablet. Your energy services provider will work with you to determine the best option.

Once your virtual audit or assessment is complete, your service provider will finalize their analysis and provide you a report with their results and recommendations.

**Ready to  
get started?**

For more information  
or to apply reach out to  
[flextech@nysersda.ny.gov](mailto:flextech@nysersda.ny.gov)