Step 1: Start a New Project

✅ **Open the tool and begin with a blank template file.**

Save a new copy of the file to your computer using a unique project name that includes the property address and today's date.

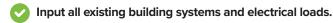(e.g., ServiceUpgradeDecisionTool_MulberrySt_MM-DD-YY)

Step 2: Enter Property Information

✅ **Input required details about the property, additional property details can be entered as needed.**

Step 3: Document Existing Systems and Loads

✅ **Input all existing building systems and electrical loads.**

- Work left to right, starting with the Yes/No Column on the far left and then, continue across each row through the remaining fields.
- Replace default values with actual nameplate system sizing if available.
- Review and adjust the "Other Existing Electrical Loads" section to reflect the home's current conditions.

> **TIP:** The tool will pre-fill typical values for HVAC and other systems based on home characteristics.

Step 4: Define Electrification Upgrades

✅ **Input building electrification goals.**

Work left to right, starting with the Yes/No Column, then, continue across each row through the remaining fields.

> **TIPS:**
> - If the intention is to add a system that wasn't existing prior indicate this in the "Upgrade/Electrify System" column with a "Y".
> - Program assumes all gas/propane appliances will be electrified and includes one EV charger.

Step 5: Assess Panel Impacts

✅ **Review the bar chart to assess the impact of electrification goals on the electrical panel.**

> **TIP:** Red Segments indicate loads exceeding panel capacity. If upgrades exceed capacity, proceed to optimization tabs sequentially.

Step 6: Optimize with Low-Power Appliances (Optional)

✅ **Select power-efficient appliance options as alternatives to default electrification choices.**

If applicable, select "Y" (highlighted in blue) to indicate you are choosing a more power-efficient appliance option instead of the default.

Step 7: Right Size HVAC System Size (Optional)

✅ **Adjust HVAC system size and remove backup strip heat if unnecessary.**

If applicable, select "Y" (highlighted in blue) to indicate the HVAC sizing has been modified for space heating, air conditioning, or ventilation.

> **TIP:** Check the "Panel Impacts and Rec's" tab to assess results.

Step 8: Implement Panel Load Management

✅ **Select a load management strategy.**

Step 9: Finalize Electrification Plan

✅ **Review the Measure Tracking Table for all system and optimization selections, adjust if capacity is exceeded.**