

Database of Screening Practices

2020 User Guide

Introduction: Background and Using Tableau

The Database of Screening Practices (DSP) – formerly referred to as the Database of State Efficiency Screening Practices (DSESP) – was originally published in fall 2018. The database serves as a repository of electric and natural gas utility ratepayer-funded energy efficiency program cost-effectiveness test inputs and supporting policies across the US. Developed in an excel spreadsheet format, feedback from two user surveys in 2019 highlighted difficulties of using, navigating, and applying data from an excel interface. Therefore, in Sept 2020, the database was migrated to Tableau, a data visualization and management software. The updated interface is accompanied by an update to the underlying dataset, which now includes new natural gas efficiency data, and new information on impact quantification methodologies used to estimate certain types of impacts (based on research by LBNL in its 2020 paper: [*Applying Non-Energy Impacts from Other Jurisdictions in Cost-Benefit Analyses of Energy Efficiency Programs: Resources for States for Utility Customer-Funded Programs.*](#))

Tableau Features

Tableau offers data sorting and visualization that incorporates data from excel spreadsheets. Key features in Tableau include:

1. Selection Menus

All tabs have selection menus that allow users to view only data for the type of energy, state(s), primary test(s), impact(s), and/or discount rate(s) in which they are interested.



2. Undo

In order to reset tabs to their original filters and sorting, press the button located at the top of each green tab.

3. Tooltips

Hover over a specific cell to view more information about the data. This pop-up will show you sources from which the cell was derived, definitions of relevant terms, and when the data was last updated.

Click on the cell to keep the tooltip in view. Upon clicking, a bottom menu will appear on the tooltip.

Select the icon to view the data source for this cell. The data will open in a new window of your internet browser.

Keep Only Exclude

Arkansas – Primary Test: **TRC**

Policy Source: Rules for Conservation and Energy Efficiency Programs, 2018, page 6

Value Source: Entergy Arkansas Energy Efficiency Program Portfolio 2019 Report, page 19

Notes: See EE annual reports for all utilities: <http://www.apscservices.info/eeAnnualReports.aspx>

Date Data Last Updated: Jun 2020
 Screening Revisions in Progress? Yes
 Using NSPM Framework? Yes

Definition of Primary Test: A jurisdiction's primary CE test typically answers the question: Which resources have benefits that exceed costs and therefore merit utility acquisition or support on behalf of customers? This test can be used as the single metric to make a "go-no go" decision about EE investments. See the NSPM for DERs for further guidance on use of primary tests.

4. Downloading the underlying dataset for each page

In the bottom right-hand corner of the portal (next to the full-screen button) there is a rectangular button with a down arrow. You will need to scroll to the bottom of the webpage to find this.



The button will pull up a menu from which users can select a file format in which to download the data: image, data, crosstab (spreadsheet), pdf, PowerPoint, and excel workbook. To analyze the underlying dataset, users can download as an excel crosstab. To download the screen view, users can download a pdf version. From the data format, users are also able to download the data as a text file.

Download

Select your file format.

- Image
- Data
- Crosstab
- PDF
- PowerPoint
- Tableau Workbook
- [Get the App](#)

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Users are encouraged to explore the new interface and database to best meet their interests and needs. Tableau is a powerful tool that offers new opportunities for understanding and analyzing cost-effectiveness screening practices around the country.

5. Additional materials. On the main DSP webpage are accompanying downloadable resources, including this User Guide and an *Impacts Guidance Document* that lists various tools and studies/resources with information on estimating various impacts.

Using the Tabs in the Tableau Database

1. Terms of Use and Navigation

Before using this database, please enter your information in the gated download page that comes up before entry into the DSP. If you have not entered your information but can view the DSP, please follow the link to the disclaimer in this tab before use.

Below the disclaimer link there are some helpful tips for navigation of the DSP. These tips will help you to make the most of the DSP and find the information you are looking for.

2. Definitions

This tab serves as the glossary for the database, where definitions are based largely on the [NSPM for DERs Glossary](#).

3. Summary of States Tab

This tab summarizes cost-effectiveness testing information for all jurisdictions in the DSP. Users can scroll down the page to view general cost test information, as well as which impacts are included in the test for each state. Users can scroll each table to the side to view additional states. There are drop-down menus at the top of this tab to filter the data by state and by field. You can select one state or compare multiple. Hovering over a cell will show policy and value source information, as well as notes.

4. Maps Tab

There are two maps of the U.S. and Puerto Rico on this tab. The first map depicts various tests and application info. Select which information you would like the maps to show at the top of the tab (Discount Rate, Primary Assessment Level, or Primary Test). To highlight only states with a particular value, select that value in the sidebar list.

The second map allows users to view which impacts are included in the tests depicted in the first map. Users can select which impacts they would like to view by using the drop-down “Field” menu located to the right of the map. Again, to highlight all states applying a particular treatment, select that value from the colored boxes in the sidebar list. Hovering over a state will show policy and value source information, as well as notes.

5. View Single State Tab

The view single state tab provides cost-effectiveness test information by state, including general test information and impact treatment in that state. Data includes whether each impact is included in the primary test, approach to calculating the impact, and the value of the impacts. Users can select the state they would like to view from the dropdown menu at the top of the tab. Hovering over a cell will show policy and value source information, as well as notes.

6. Test & Application Info Tab

This tab shows general cost-effectiveness test info for all states. Users can select the states they would like to view in the dropdown menu at the top of the tab. Users can select one state to view, or several states to compare. Hovering over a cell will show policy and value source information, as well as notes.

7. Utility System Impacts Tab

The Utility System Impacts Tab shows information on treatment of utility system costs and benefits in state CE tests. Users can select the information they would like to view by choosing to see whether each impact is included in the states' primary tests, how the states describe the impacts, and what approach the state uses to calculate the impact if applicable. With the dropdown menus above the tables, users can select multiple states and impacts to compare. Users can scroll right in the table to view additional impacts and scroll up/down to view the benefits or costs tables. Hovering over a cell will show policy and value source information, as well as notes.

8. Non-Utility System Impacts Tab

The Non-Utility System Impacts Tab shows information on treatment of non-utility system costs and benefits in state CE tests. Users can select the information they would like to view by choosing to see whether each impact is included in the states' primary tests, how the states describe the impacts, and what approach the state uses to calculate the impact if applicable. Use the drop-down menus above the table to choose which state(s) and impact(s) you would like to view. Users can scroll right in the table to view additional impacts. Hovering over a cell will show policy and value source information, as well as notes.

9. Impacts Summary Tab

This tab allows users to view impact treatment across jurisdictions. The chart shows how many jurisdictions out of the 52 (United States, Washington D.C., and Puerto Rico) include a selected impact in their primary CE test. Users can select whether they would like to see impacts which are definitely included (Yes) in the test or may be included potentially. Hovering over a bar will show the impact name and number of jurisdictions out of 52 including that impact in their test. Use the drop-down menus at the top of the tab to choose which Primary Test and which field(s) you would like to view.

10. Impact Methods Tab

This tab allows users to view all data available for any impact. The chart shows the primary test for each state, whether the selected impact (selected using the drop-down menus located at the top of the tab) is included in that state's primary test, how the impact is calculated or estimated, and information from the referenced LBNL report on the impact's quantification if applicable. This quantification information includes categorization of how the data was collected in the impact quantification study, a description of the method used to assess the data, and the method's transferability, as assessed in the LBNL report (which appears in the tooltip for this tab). Users can also filter this information by which states they would like to view.