



# **FORTIFIED Home™**

## **FOCUS 2.5** Quick User Guide

October 2022



## FORTIFIED Home™ FOCUS 2.5 Quick User Guide

Welcome to FOCUS 2.5! This new software is designed to streamline the FORTIFIED™ Home evaluation process and provide an improved user experience.

While some elements will look and feel familiar, FOCUS 2.5 is very different from prior versions and includes new features and upgrades that may take a little getting used to. However, the software is designed to be intuitive and user-friendly, so with a few quick pointers to get you started and a little practice, you will soon be processing FORTIFIED evaluations at full speed and more efficiently than before!

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## Sign Up for a New Account

- To sign up for a new account, navigate to <https://ibhs.fortified.org/>
- Click **“Sign up now”** underneath the blue “Sign In” button (fig. 1)
- Complete Sign-up flow
  - Verify Email
  - Create Password
  - Input remainder of the field
    - First Name
    - Last Name
    - Phone Number
    - Company Name
- Once you sign up, IBHS will assign you the proper role and confirm your credentials are ready for use.
- **Once you sign up, submit a Zendesk ticket with the subject “Request FOCUS 2.5 access,” by emailing [support@ibhshelp.zendesk.com](mailto:support@ibhshelp.zendesk.com). IBHS will then assign you a role**

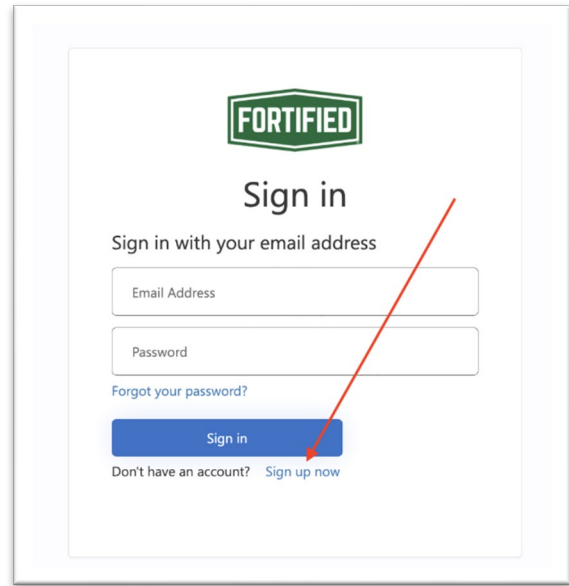


Figure 1

## Login

- Navigate to <https://ibhs.fortified.org/>
- Enter your Username
  - This is the email address that you used during the Sign-up flow
- Enter your Password
  - This is the password that you created during the Sign-up flow
- Click **“Sign In”**

## Forgot Password?

- Navigate to <https://ibhs.fortified.org/>
- If you happen to forget your password, you can click on the **“Forgot your password?”** button from the Sign In page (fig. 2)
- Complete Forgot Password flow
  - Verify Email
  - Create new password

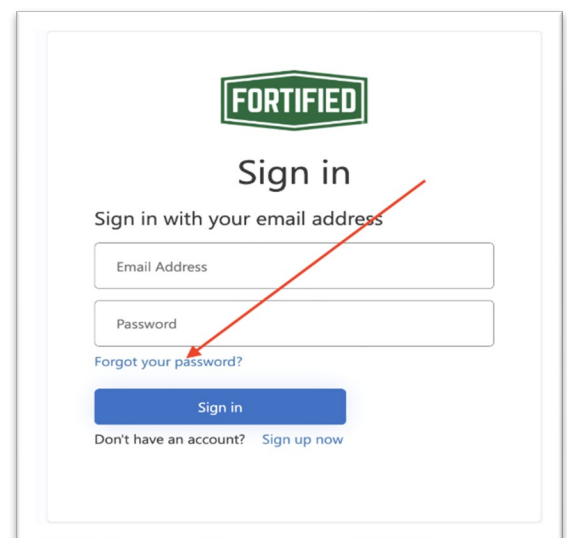


Figure 2

# Navigating the Evaluator Dashboard

**⚠ Important:** check the role at the top right of the dashboard next to your name (fig. 3 - A) and confirm it is the correct one. **If your role is listed as “FC Applicant”, STOP!** Roles for FORTIFIED Home evaluators should only be “FH Evaluator” or “FH Evaluator Admin”. To request a role change, submit a Zendesk ticket by emailing [support@ibhshelp.zendesk.com](mailto:support@ibhshelp.zendesk.com) with the subject “Request FOCUS 2.5 access.” IBHS will then assign you a role.

The FOCUS 2.5 Evaluator Dashboard (fig. 3) is fully customizable, with several new features and a host of improvements over prior versions of the FOCUS software.

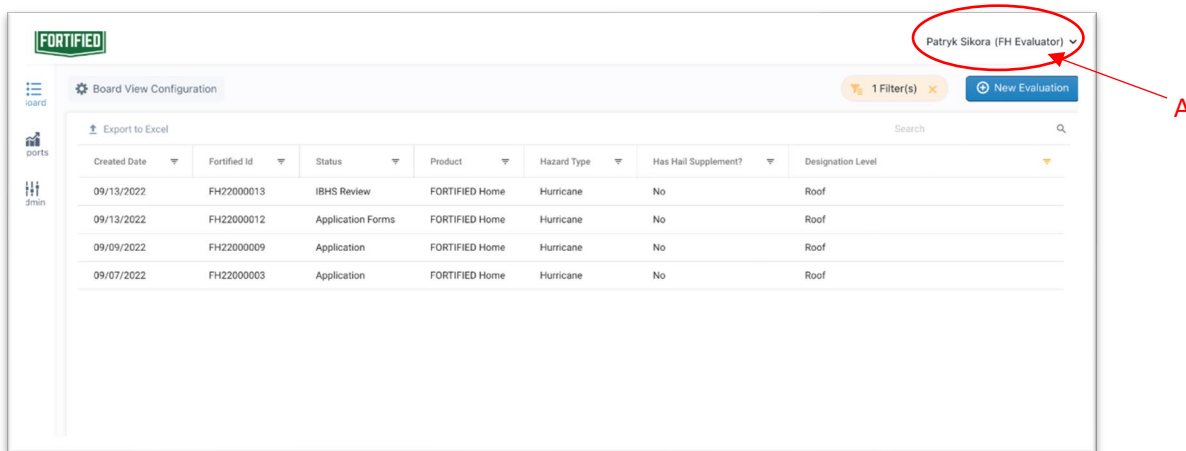


Figure 3

## Dashboard Features

- Filters
  - Click on the column name to sort A-Z or Z-A (fig 4 – A)
  - Click on the arrow next to any column name to use Excel-like filter functionality (fig 4 – B)

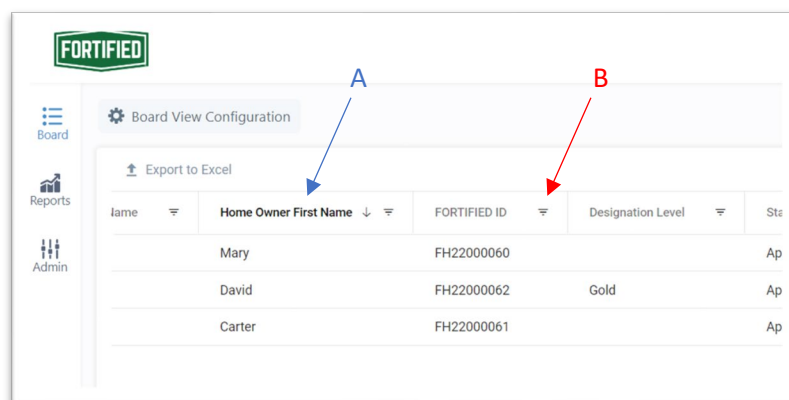


Figure 4

- Global Filter Button
  - To see filters you have currently applied, hover over the global filter button (fig. 5).

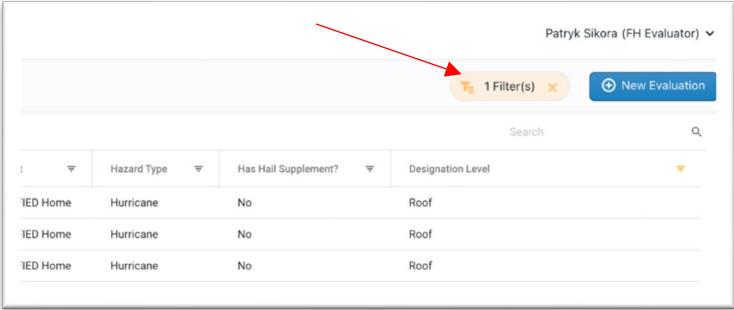


Figure 5

- You can also clear all filters by clicking the “x” (fig. 6)

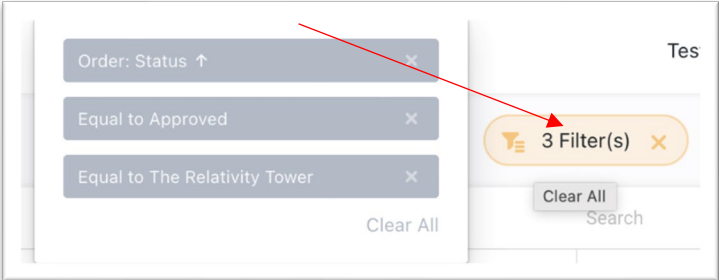


Figure 6

- Drag and drop Column Order
  - You can drag and drop the order of the columns
- Search
  - You can search by a wide variety of datapoints, including name, address, FORTIFIED ID, expiration date, etc. (fig. 7 - A)
- Export to Excel
  - You can export to excel (fig. 7 - B)
- Board View Configuration
  - Click the “**Board View Configuration**” button, (fig. 7 - C), if you would like to remove or add columns to your board
- Click directly on the row in the board to open any of your evaluations

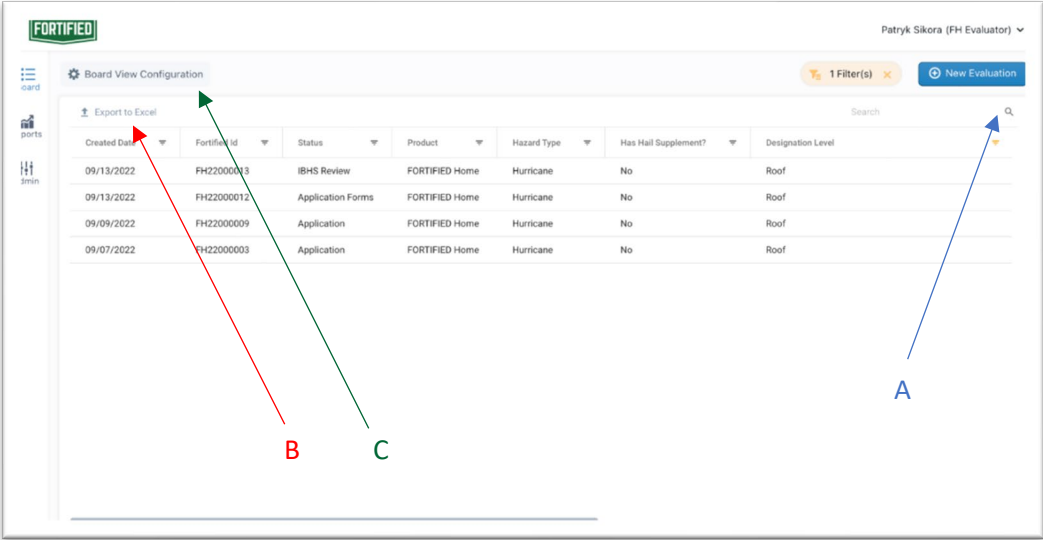


Figure 7

## Starting a New Evaluation

- To start a new evaluation, click the **“+ New Evaluation”** button (fig 8).

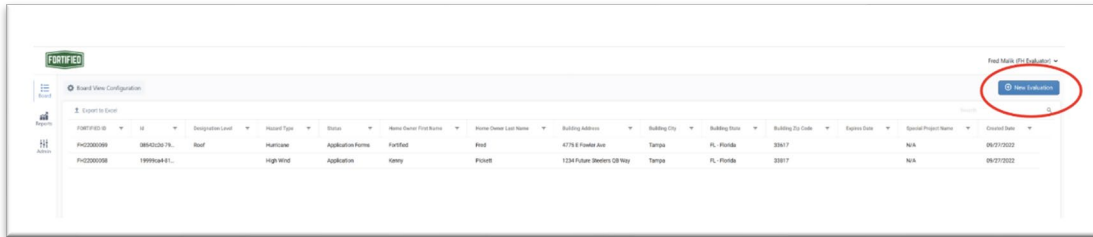


Figure 8

- This will redirect you to the “Basic Info” form (fig. 9).
- Once the “Basic Info” form is submitted, the evaluation has been started, and you will see it added to your board (fig. 10)

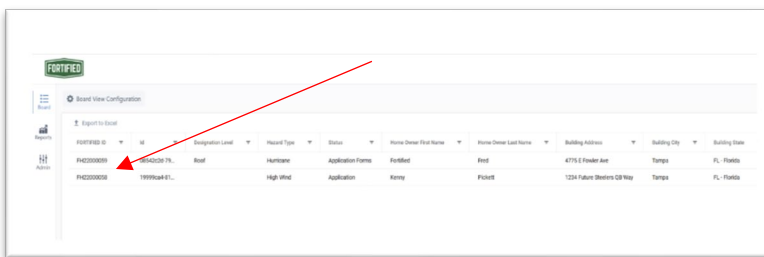


Figure 10

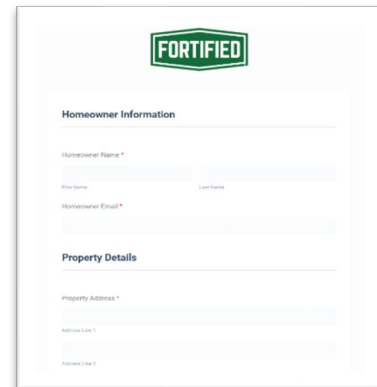


Figure 9

## Completing an Evaluation

- Once you’ve submitted the “Basic Info” form the “Eligibility” form, will appear for submission in the Checklist (fig. 11).

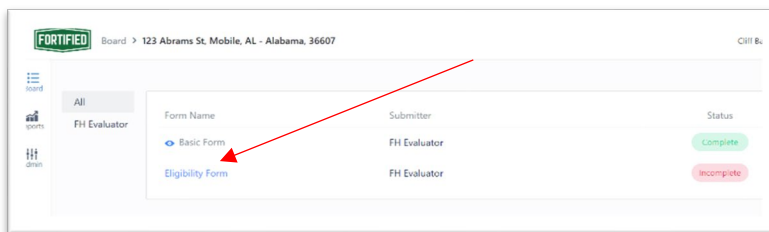


Figure 11

- When the “Eligibility” form (fig. 12) is complete and submitted, the remainder of the required forms will appear in the Checklist (fig. 13).

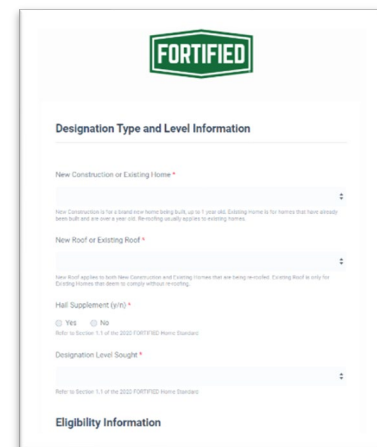


Figure 12

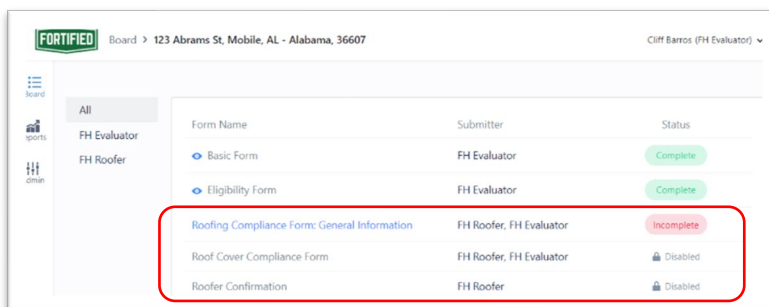


Figure 13

Some forms are intended to be submitted by the roofer, engineer or contractor (i.e., not the evaluator). The Checklist will identify both the **“Submitter”** (fig. 14 – A) and the **“Status”** of each form (fig. 14 – B).

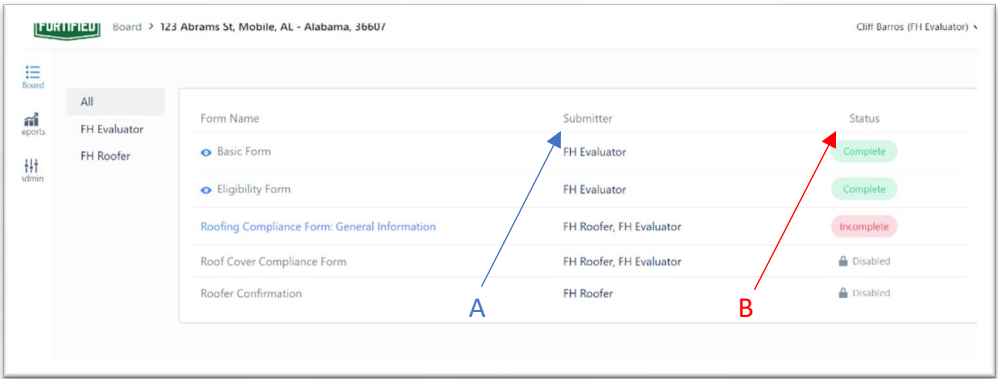


Figure 14

The evaluator can filter forms for different Submitters by using left sidebar filter (fig. 15 – A) and doing so will allow access to the **“Notify Submitter”** button (fig. 15 – B).

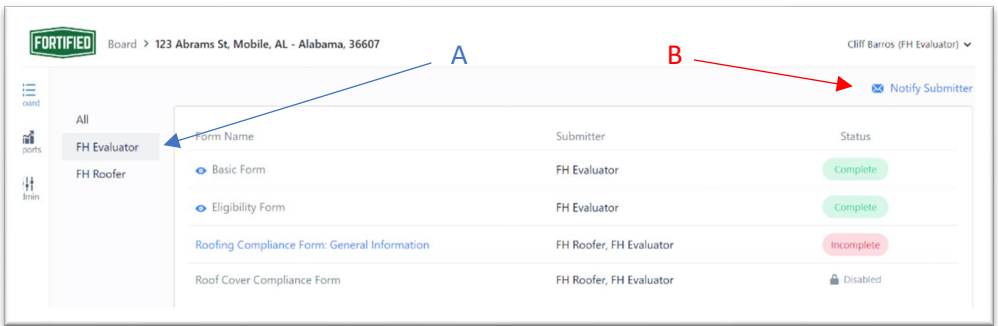


Figure 15

Clicking **“Notify Submitter”** will generate an email with links to the forms that the submitter must complete.

**⚠ Note:** Once a form is started, it must be completed, or information will be lost. Uploaded files (e.g., photos) may be stored, but **no other information on partially completed forms will be stored.**

- Status of the forms will change from **“Incomplete”** to **“Complete”**, as they are finished.
- When the **“Eligibility”** form is completed, the status of the evaluation will change to **“Application Forms”** on the Evaluator Dashboard (fig. 16).

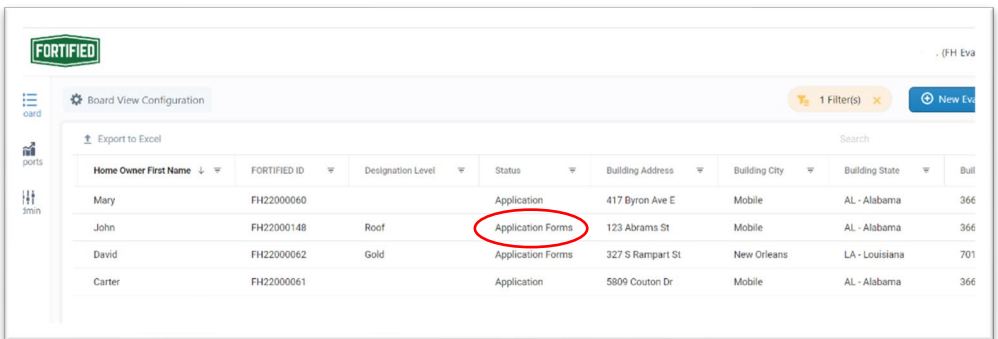


Figure 16

- When all required application forms are complete, the status will change to **“Payment.”**
- Once the payment form is complete, the evaluation is submitted to IBHS for review, and the status will change to **“IBHS Review”**.
  - ⚠ **Note:** Evaluators may review and edit any form, for which they are the Submitter, until the evaluation reaches **“IBHS Review”** status. At that point all changes must go through the iteration engine.
- **The evaluator will be notified by email of all status changes for the evaluation application.**

## File Management Features

Documentation files can be uploaded directly within the FOCUS 2.5 application. Some of the key management features that are available in the file uploader are:

- Upload
  - Click the **“+”** button and then click **“Upload”** (fig. 17).

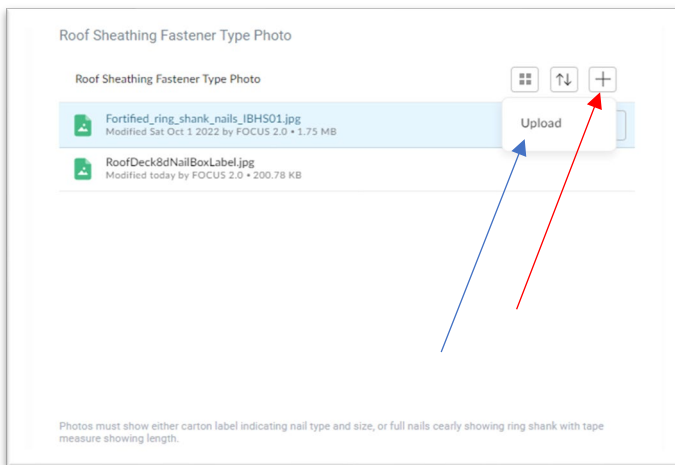


Figure 17

- Multiple files can be uploaded at the same time by dropping and dragging or browsing your device.
- To view the file and features you will need to click the **“Close”** button after you have uploaded a file (fig. 18).

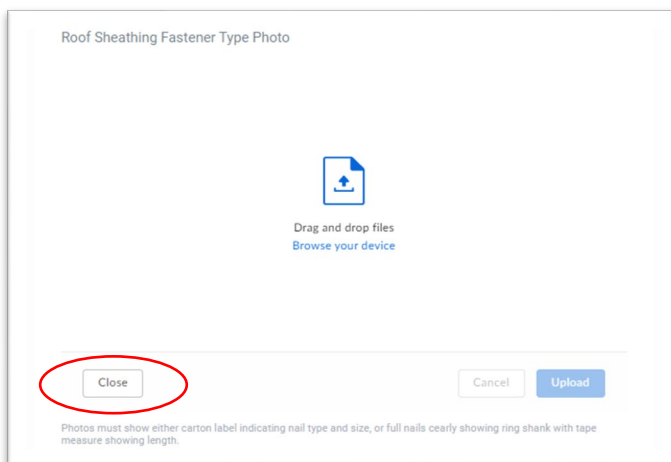


Figure 18



Once files are loaded, evaluators will have the ability to manage them within the forms. Options include:

- Preview
  - Click the “...” button (fig. 19) and then “Preview”
- Delete
  - Click the “...” button and then “Delete”
- Download
  - Click the “...” button and then “Download”
- Rename
  - Click the “...” **button** and then “Rename”

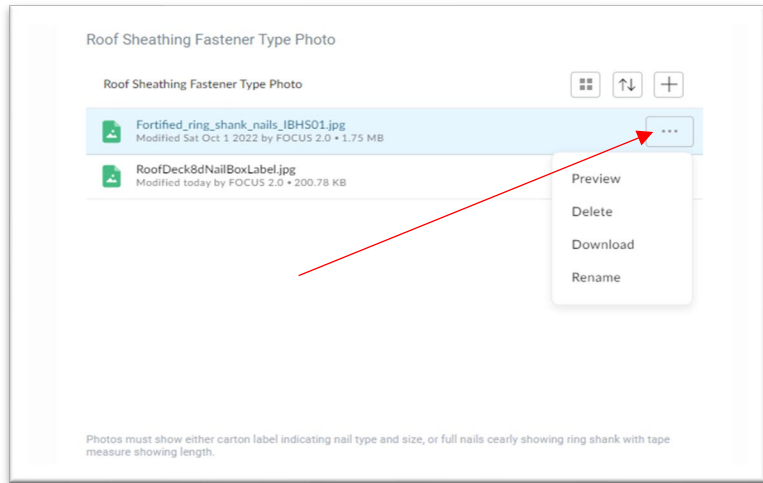


Figure 19

- Evaluators can also toggle between a list view (fig. 20) and a grid view (fig. 21) by clicking the view button (circled).

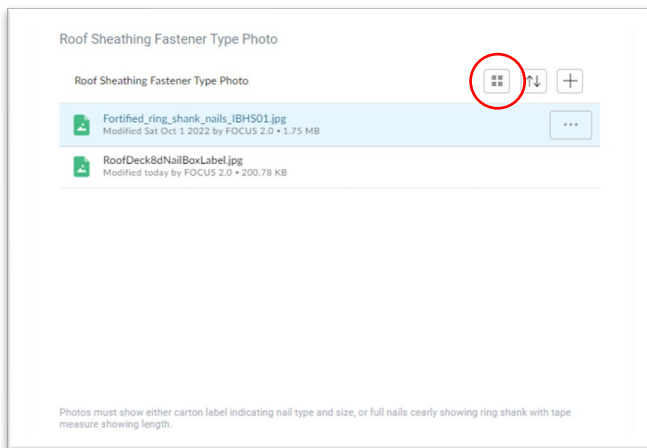


Figure 20

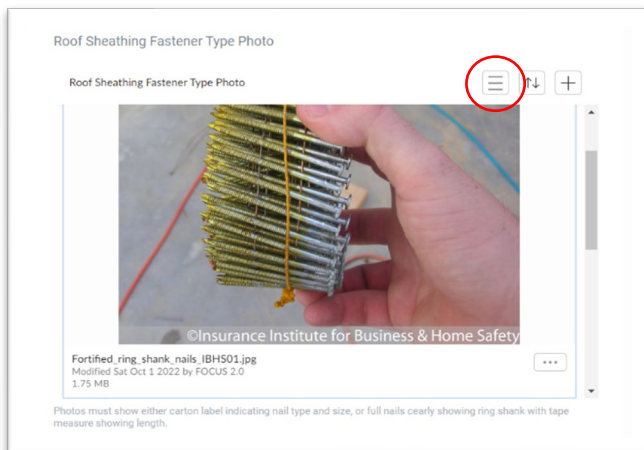
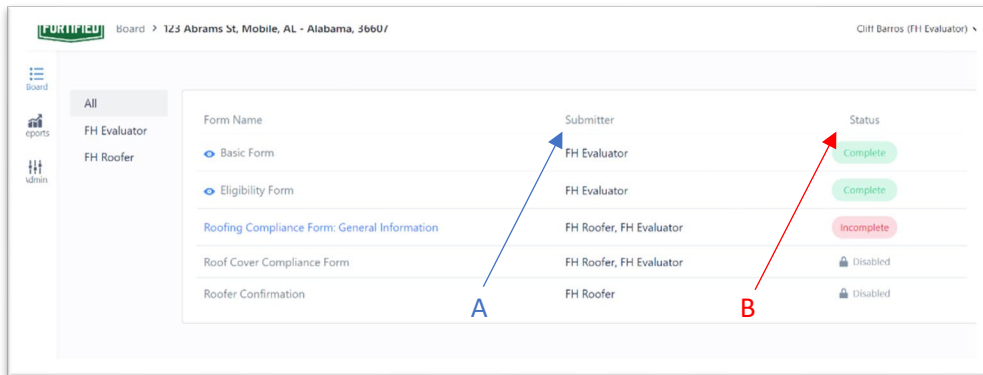


Figure 21

## Compliance Process

FOCUS 2.5 will generate the required compliance forms for each evaluation. For example, an evaluation for a home with engineered chimneys seeking a Silver or Gold designation will automatically generate chimney compliance forms for both the engineer and the installing contractor.

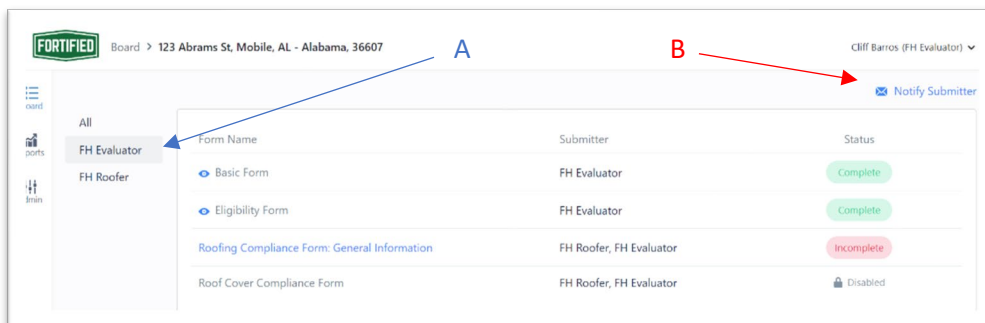
Compliance forms are intended to be submitted by the roofer, engineer or contractor (i.e., not the evaluator). The Checklist will identify both the “**Submitter**” (fig. 22 – A) and the “**Status**” of each form (fig. 22 – B).



Form Name	Submitter	Status
Basic Form	FH Evaluator	Complete
Eligibility Form	FH Evaluator	Complete
Roofing Compliance Form: General Information	FH Roofer, FH Evaluator	Incomplete
Roof Cover Compliance Form	FH Roofer, FH Evaluator	Disabled
Roof Confirmation	FH Roofer	Disabled

Figure 22

The evaluator can filter forms for different Submitters by using left sidebar filter (fig. 23 – A) and doing so will allow access to the “**Notify Submitter**” button (fig. 23 - B).



Form Name	Submitter	Status
Basic Form	FH Evaluator	Complete
Eligibility Form	FH Evaluator	Complete
Roofing Compliance Form: General Information	FH Roofer, FH Evaluator	Incomplete
Roof Cover Compliance Form	FH Roofer, FH Evaluator	Disabled

Figure 23

Clicking “**Notify Submitter**” will generate an email with links to the forms that the submitter must complete.

**⚠ IMPORTANT:** The evaluator can populate compliance forms if desired, provided they have all the correct information. However, the intended **Submitter MUST review this information and confirm its accuracy by completing the Confirmation forms.** The evaluator **MAY NOT** complete the Confirmation forms for the Submitter.

Confirmation forms have a link to generate and download a PDF of all the answers entered into the compliance form (fig. 24), allowing the Submitter to review the compliance form in its entirety, and modify answers as needed. The Submitter **MUST** sign the PDF compliance form in their preferred method (i.e., electronic signature/seal or manual/handwritten wet signature, seal) and upload it to the job.

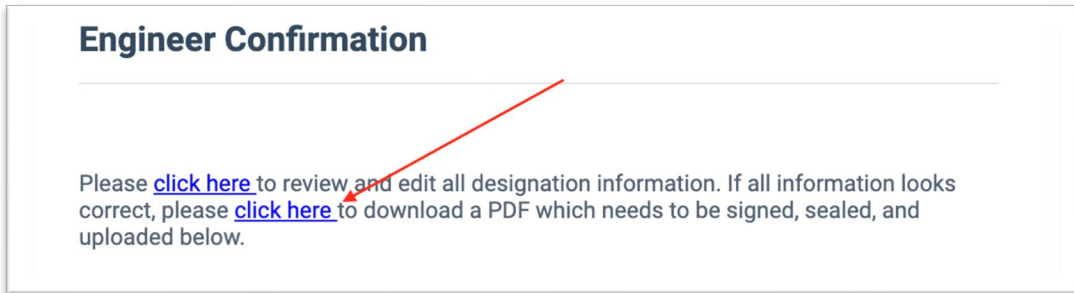


Figure 24

- For engineers, contractors or roofers who cannot or do not wish to complete electronic forms, paper versions of the compliance forms (available on the [Technical Resources page on fortifiedhome.org](#) under Technical Documents List (filterable)) can be used as they have in the past. When paper versions are used, the evaluator must complete the electronic compliance forms in FOCUS 2.5 matching the answers on the paper forms, and scan and upload the paper forms in the Confirmation forms.

**Compliance Form Options**

FOCUS 2.5 offers three options that can be initiated directly from the software.

- 1. The responsible party (roofer, builder, engineer) completes forms electronically and signs the generated PDF form.**

In this scenario, the evaluator's only role regarding compliance forms is to send the responsible party links to the forms by using the "Notify Submitter" feature. After that, the responsible party completes the forms.
- 2. The evaluator fills out forms and the responsible party electronically reviews, and signs generated PDF form.**

In this scenario, the evaluator assists the responsible party by filling out the compliance forms, and only sends them a link to the confirmation form. The responsible party will review the generated PDF compliance form, confirm everything is correct, and sign the form. Either the responsible party or the evaluator may upload the form.
- 3. The responsible party manually fills out and signs a PDF/paper compliance form only.**

For responsible parties that do not want any electronic process, the evaluator can provide them with either a pdf or hard copy of a blank compliance form from the FORTIFIED website. The responsible party can manually fill out and sign the form. The evaluator will need to input all the entries from the paper form into FOCUS and upload the pdf signed by the responsible party.

## Audit Review Process

- After all required application forms have been completed and the evaluator has completed the **“Payment”** form, the evaluation application will be submitted to IBHS for review. An IBHS Auditor will review the information provided in the forms, and request changes such as additional documentation, if necessary.
- If changes are requested by IBHS, the evaluator will receive an email notifying that changes are requested for the evaluation application. Additionally, the status of the evaluation application will change to **“Changes Required”** on the evaluator’s board.
- Clicking on the evaluation on the evaluator’s board will bring up the job and identify which fields require changes (fig. 25).

The screenshot displays the 'FOCUS 2.0 Iteration Engine – Quick Navigation Guide' interface. At the top, it shows the address '900 UKAMPLE DRIVE, ANY CITY, AL 22222 (CR18 BLD ID 1U10202009021)'. On the left, a sidebar lists navigation options: 'Bank Information', 'Liability Items', 'Roofing Compliance Form: General Information', 'Roof Cover Compliance Item', and 'Roofing Confirmation'. The main area contains a form with several sections: 'Zone 1 Required Site Design Up(7) Pressure (psi)', 'Zone 2 Required Site Design Up(7) Pressure (psi)', 'Zone 3 Required Site Design Up(7) Pressure (psi)', and 'Zone 1, 2, and 3 Required Site Design Up(8) Pressure Documentation'. Below these are fields for 'Shingle manufacturer name', 'Shingle product name', and 'Shingle Manufacturer and Product Photo'. A 'Change Request Addressed' status bar at the top right shows '0/3 Change Request Addressed' and 'Send for Review'. A dialog box on the right displays '0/3 Unaddressed Change Requests' and a 'Next' button. A 'Submit Comment' button is located at the bottom right. Red circles with numbers 1 through 6 highlight specific features: 1 (sidebar), 2 (highlighted form section), 3 (Next button), 4 (dialog box), 5 (Submit Comment button), and 6 (Change Request Addressed bar).

Figure 25

The iteration engine provides the following information:

- List of all forms with current selected form highlighted (fig. 25 – 1).
  - Data entry category where changes have been requested will be highlighted in yellow (fig. 25 – 2).
  - Status bar showing what change request you are currently viewing over the total number of change requests. Clicking **“Next”** will automatically direct you to the next change request (fig. 25 – 3).
  - Current change request dialogue box displaying IBHS Auditor comments and status of change request (fig. 25 – 4).
  - Message box to submit comments to IBHS Auditor pertaining to the current change request. Click **“Submit Comment”** to send the comment to IBHS (fig. 25 – 5).
  - Total change request status bar: When evaluator has addressed all change requests, click **“Send for Review”** to submit the updated evaluation to IBHS (fig. 25 – 6).
- The evaluator must address the changes requested and resubmit the evaluation after all changes have been addressed.

## Accessing the Designation Certificate

- Once an evaluation has been designated by IBHS, its status on the Evaluator Board will change to **“Approved,”** and the evaluator will be notified by email.
- To access the Designation Certificate, click on the evaluation and then click on **“View Certificate”** (fig. 26). From here, you can print or print to PDF.

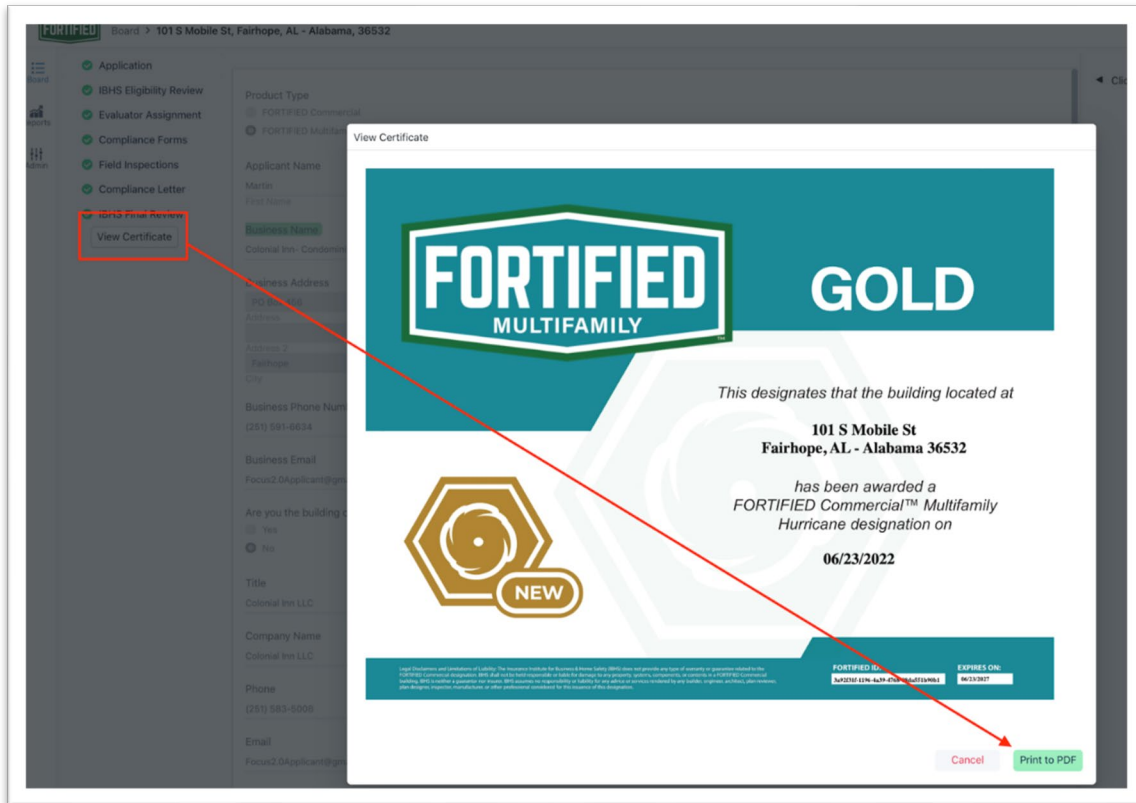


Figure 26

- If an evaluation is not designated by IBHS, the status on the Evaluator Board will change to **“Not Approved,”** and the Evaluator will be notified by email.

## Questions and Suggestions

If you have a question that was not answered in this user guide, or if you would like additional information about the transition to FOCUS 2.5, please [click here for answers to Frequently Asked Questions](#).

If the FAQ's don't provide an answer or if you have an idea to improve the software, please submit your question or suggestion by using this link, [clicking here](#).