



VA WEATHERIZATION ASSISTANCE PROGRAM Information Notice 3-2023

TO: ALL Virginia WEATHERIZATION SUB-GRANTEES
FROM: NANCY PALMER, HOUSING PROGRAMS MANAGER/*np*
DATE: 7/11/2023
SUBJECT: Managing multiple funding streams in HEAT (Audit)
Supersedes: DHCD Information Notice 01-2019

Effective Date: Immediately

Purpose:

This Information Notice is to notify Virginia Weatherization Assistance Program (WAP) sub-grantees of the guidelines around the utilization of multiple funding streams and how to model Weatherization Measures in Hancock Energy Audit Tool (HEAT).

Background:

In 2022 DOE released "[DOE WPN 22-9 Managing Multiple Funding Streams within the Weatherization Assistance Program](#)". This notice includes specific guidance on how multiple funding sources can be leveraged to benefit the clients WAP serves. In the examples included in WPN 22-9, DOE uses Weatherization Assistant (NEAT\MHEA) and spreadsheets that must be included in every client file. Virginia uses HEAT instead of the Weatherization Assistant which allows us to track these funding sources without a spreadsheet or some other form of documentation.

This information notice and the attached PDFs contain guidance and reference material for the Virginia Weatherization network.

Leveraged funds are "federal and/or non-federal sources of funds secured with the intent of supplementing DOE WAP, where the funding source aims to achieve a certain objective and allows the receiving (WAP) local provider to determine the individual recipient(s) of the measure(s)".

Braided funds are defined as multiple separate funding sources used, including DOE WAP funds, on one weatherization project to address the different needs within the home, while ensuring each funding source is isolated and tracked independently.

- Typically, individual measures are fully paid for by a single funding source, which may or may not be subject to a cost-effectiveness test, and the reporting requirements can be followed for that specific funder.

Co-Funding is used to split the cost of a measure(s) between DOE and non-DOE funding source(s) when the overall job SIR is 1.0 or greater and the Wx measure(s) SIR does not meet DOE's requirements.

- DOE funds may only be incorporated into the measure cost to the point of cost effectiveness (e.g., if a furnace is cost-effective at \$2,800 but the full cost is \$3,800, installed, DOE funds can only support \$2,800 of the furnace cost and other funds must be used for the remaining \$1,000 balance).
- The co-funded measure(s) remain the last measure(s) in the package of measures that generates an SIR being installed to ensure the co-funded measure(s) do not "leapfrog" over other measures that are cost-effective on their own merit, causing them to drop off the installation list.

For simplicity, DHCD recommends Subgrantees use a single funding source on each measure. However, DHCD recognizes there are instances when splitting the cost between multiple funding sources is beneficial. When splitting the cost of a measure between multiple funding sources, the rules and guidance for the stricter funding source must be applied. **(Use extreme caution)**

When leveraged funds can be used

Leveraged funds may be applied to any project providing all applicable measures are included in the HEAT audit at full cost (Material and Labor) and the overall Job SIR requirement is met.

- Keep in mind DHCD does not keep up with the rules and guidance released by funding sources other than DOE, LIHEAP, WRF, BIL and WDR. WAP subgrantees must follow the stricter guidance when there are differences between funding sources.

Reporting Leveraged funds and Invoicing in Hancock:

Every funding source utilized on a Weatherization project\job must have an invoice created and submitted to DHCD within Hancock. DHCD does not administer every funding source available to the Weatherization network. No funds will be transferred from DHCD to the subgrantees for funding sources other than DOE, LIHEAP, WRF, BIL and WDR. All other invoices submitted to DHCD will be used to generate impact reports and used for tracking purposes.

In the attached documents DHCD outlines how to model leveraged funds in HEAT so they can be tracked independently according to DOE WPN 22-9.

****Once the energy audit is locked by an energy auditor, the audit should never be unlocked by anyone other than the auditor or audit team who locked the audit. If a change order or other types of changes need to occur after the job is locked, you must follow the “Change Audit” process.**

Attachments

- Leveraging PPT (Braiding and Co-Funding)
- Braided Energy Saving Report Final Audit
- Co-Funding Energy Savings Report Finalized Audit
- Co-Funding Energy Savings Report (containing measures for a SIR below 1.0)



Weatherization Assistance Program Leveraged Funds



VIRGINIA DEPARTMENT OF HOUSING
AND COMMUNITY DEVELOPMENT
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BRAIDED FUNDS

Energy Modeling (HEAT)





Starting the Energy Audit



"Client Job List" Screen now available for auditors.

Welcome dcaldwellIVA



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HEAT Enterprise

HOME

LEAD MANAGEMENT

CLIENT MANAGEMENT

JOB MANAGEMENT

Client Status Report

Job Progress Report

Job List

WORKFLOW

Job Assignment

VENDOR/CREW

Vendor/Crew List

Vendor User

Personnel

INVOICING

Other Program

Operations Costs

Invoice List

Approval List

Amendment List

Cash Reconciliation List

View Invoice

Approved Invoice

Report

Approved Invoice

Statistical Report

Credit

REPORTING

Budget Balance

Adjust Budget

Production And Job

Cost

District Reports

System Reports

DOE Reports

State Approval

Wage Approval

Approved Statistical

Report

Program Performance

Reports

Client Report

Configuration

REPORTS

GENERAL INFORMATION

Edit Client - Braiding Example

Client Information - DHCD

Client History for 472669392 (DHCD)

☒ WAP

+ Contact

- Application

Agency

Virginia DHCD

Client Status

Qualified

Allocation

WAP

Expiration Date

1/24/2024

Date of Last Weatherization

Client Number

472669392

Intake By

David Caldwell DHCD

Wap Rank

5

Primary Heating*

Electric

Building Type*

Owner-Occupied Single Family Site Built

☐ Inactive

Inactive Date

Inactive Reason

☐ Deferred

Deferred Date

Client Denied Reason

Applied Date*

1/24/2023

Certified Date*

1/24/2023

Categorical Eligibility

Social Security Act Title XVI SSI

☐ Reweatherization

Reweather. Date

Client Tag

Agency Tag

Add New

Delete

<input type="checkbox"/>	Client Contact Method	Contact Date	Follow Up Date	Comment
There are no records available.				



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Select Weatherization from the Job Type dropdown



If you experience issues with Hancock contact a DHCD team member.

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HEAT Enterprise

HOME CLIENT INFORMATION

WAP

Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures

WEATHERIZATION

BASELOAD

HOT WATER

WORK ORDER

Upload Photo

ENERGY SAVINGS

Energy Savings
Modeling Report
Quick Home Audit

AUDIT INFORMATION Braiding Example (Single family home using single family modeling)

Site Assessment

Copy Job From

First Name	Braiding	Last Name	Example
WAP Priority	3	Agency	Virginia DHCD
Job Number*	472669392	Auditor	David Caldwell DHCD
Job Type*	Weatherization	Job Status*	Audited
Assessment Date	---		
Complete Date	---		
Audit Type	Emergency No Heat LIHEAP Time Sensitive Utility		Tier
<input type="checkbox"/> Need Approval			
<input type="checkbox"/> Deferred			

Nearest Weatherization
State: Virginia Location: Richmond

House Information

Building Type*	Wood Frame Home with Crawl Space and Open Joist Attic
DHW Heating	Electric
Basement Type	Crawl Space
# of Smokers&Pets	0
# of Woodstoves	0
# of Fireplaces	0
# of Unvented Heaters	0
# of Bedrooms	3
Year Built*	2000

☐ Knob&Tube
☐ Asbestos (Old)
☐ Lead Paint
☐ Moisture Problems
☐ VOC
☐ Built before 1979

Historic Preservation Review

Historic Review* 2a Exempt due to age (50 years old or under)



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Fill out the assessment date (Date the auditor was on site) and select the name of the auditor

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AUDIT INFORMATION Braiding Example (Single family home using single family modeling)

Site Assessment [Copy Job From](#)

First Name	Braiding	Last Name	Example
WAP Priority	3	Agency	Virginia DHCD
Job Number*	472669392	Auditor	David Caldwell DHCD
Job Type*	Weatherization	Job Status*	Audited
Assessment Date	12/08/2022		
Complete Date	None	Furnace Tech	
Audit Type	Full House Audit	Coaching Date	
<input type="checkbox"/> Need Ap			
<input type="checkbox"/> Deferr			

Nearest Weatherization Location

State: Virg Location: Richmond

House Information

Building Type*	Wood Frame Home with Crawl Space and Open Joist Attic
DHW Heating	Electric
Basement Type	Crawl Space
# of Smokers&Pets	0
# of Woodstoves	0
# of Fireplaces	0
# of Unvented Heaters	0
# of Bedrooms	3
Year Built*	2000

☐ Knob&Tube
☐ Asbestos (Old)
☐ Lead Paint
☐ Moisture Problems
☐ VOC
☐ Built before 1979

Historic Preservation Review

Historic Review* 2a Exempt due to age (50 years old or under)

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Select “Full House Audit” from the audit type dropdown. Complete the audit information screen and SAVE!

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AUDIT INFORMATION Braiding Example (Single family home using single family modeling)

Site Assessment [Copy Job From](#)

First Name: Braiding Last Name: Example
WAP Priority: 3 Agency: Virginia DHCD

Job Number*: 472669392 Auditor: David Caldwell DHCD
Job Type*: Weatherization Job Status*: Audited
Assessment Date: 12/08/2022
Complete Date: None Furnace Tech: ---
Audit Type: **Full House Audit** Coaching Date: Tier:
☐ Need Approval
☐ Deferred

Nearest Weather Location

State: Virginia Location: Richmond

House Information

Building Type*: Wood Frame Home with Crawl Space and Open Joist Attic
DHW Heating: Electric
Basement Type: Crawl Space ☐ Knob&Tube
of Smokers&Pets: 0 ☐ Asbestos (Old)
of Woodstoves: 0 ☐ Lead Paint
of Fireplaces: 0 ☐ Moisture Problems
of Unvented Heaters: 0 ☐ VOC
of Bedrooms: 3 ☐ Built before 1979
Year Built*: 2000


Historic Preservation Review

Historic Review*: 2a Exempt due to age (50 years old or under)

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Once all applicable measure have been selected, select the “Leveraged” funding source. Measure must be modeled at full cost!



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









HEAT Enterprise


HOME
CLIENT INFORMATION
▼ WAP
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
► WEATHERIZATION
► BASELOAD
► HOT WATER
► WORK ORDER
Upload Photo
▼ ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit


SELECTED MEASURES Braiding Example (Single family home using single family modeling)

Actions	Measure	Section	Quantity	Unit	Unit Material Cost	Unit Labor Cost	Total Material Cost	Total Labor Cost	Total Cost	Funding Source	Vendor	Inspection Date	Comment
  	(AM) Install Chair Rail	Wall 2	50	LF	3.5	1.5	175.00	75.00	250.00	Leveraged	J&J Weatherization, Inc.		were unable to add the wall insulation.
  	(AM) Install Chair Rail	Wall 3	25	LF	3.5	1.5	87.50	37.50	125.00	Leveraged	J&J Weatherization, Inc.		
  	(AM) Install Chair Rail	Wall 4	25	LF	3.5	1.5	87.50	37.50	125.00	Leveraged	J&J Weatherization, Inc.		
  	(AM) Register Replacement	Distribution 1	2	EA	15	15	30.00	30.00	60.00	Leveraged	J&J Weatherization, Inc.		Replace 6" round ceiling register in the living room and Br-1
  	(ES) Air Seal - Blower Door Guided	Infiltration	1	SF	169.78	390.67	169.78	390.67	560.45	Leveraged	J&J Weatherization, Inc.		
  	(ES) Cellulose DP R-13	Wall 1	359.17	SF	0.53	0.56	190.36	201.14	391.50	Leveraged	J&J Weatherization, Inc.		Dense pack all exterior walls with Cellulose insulation. Small amount of furniture will need to be moved around to access exterior walls.
  	(ES) Cellulose DP R-13	Wall 2	359.17	SF	0.53	0.56	190.36	201.14	391.50	Leveraged	J&J Weatherization, Inc.		
  	(ES) Cellulose DP R-13	Wall 3	179.17	SF	0.53	0.56	94.96	100.34	195.30	Leveraged	J&J Weatherization, Inc.		

Records: 1 - 27 of 27

Total Labor Cost 6,114.01
Total Material Cost 8,016.82
Total Cost 14,130.83

Funding Source | Leveraged | Vendor |  Set

1. This value has been amended


3. This job has exceeded the state maximum quantity or cost



Run\Recalculate the audit and take note of job SIR. No matter the funding source(s) the Job SIR must remain above 1.0 threshold.

If you experience issues with Hancock contact a DHCD team member.

HEAT Enterprise

HOME

CLIENT INFORMATION

WAP

- Client Job List
- Audit Information
- Wap Document
- Questionnaire
- Priority Audit
- Selected Measures

WEATHERIZATION

- Heating/Cooling Dashboard
- Attic
- Wall
- Window/Door
- Basement/Floor
- Air Infiltration
- Ashrae Ventilation
- Combustion Test
- CO Test
- Combustion Safety
- Other Measures

BASELOAD

HOT WATER

WORK ORDER

ENERGY SAVINGS

- Energy Savings
- Modeling Report
- Quick Home Audit

ENERGY SAVINGS Braiding Example (Single family home using single family modeling)

Recalculate

Use Estimated costs

Funding Source: ---

Location: Richmond, VA

Job SIR: 1.8551

30.83

Job Lifetime: 21.72 Years

Annual Savings of 41.31 mmbtu

Lifetime Savings of 897.19 mmbtu

Total Fuel Cost \$1,650.00

Heating Degree Days 3509.38

Post Heating Degree Days 3509.38

Pre Cooling Degree Days 2010

Post Cooling Degree Days 2010

System Design Capacity

Item	Pre	Post
Heating	✗	✓
Cooling	✗	✓
Peak Heating Load (BTU/Hr)	56605.42	25814.78
Heating Output (BTU/Hr)	30000	30000
Cooling Output (BTU/Hr)	30000	30000
Peak Cooling Load (BTU/Hr)	42801.71	24307.22
Heating Thermostat Setting	68	68
Cooling Thermostat Setting	78	78
Heating Design Temperature	18	18
Cooling Design Temperature	92	92
Tolerance	0	0
Annual Heating Architectural Load (MMBTU)	42.6	19.42
Annual Cooling Architectural Load (MMBTU)	25.22	15.61

Records: 1 - 13 of 13

Energy Saving Measures

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Appliance 1	---	---	(ES) LED - 75w equivalent	2.54	60.92	202.20		9.70	37
Distribution 1	---	8.00	Distribution Measures	14.97	299.47	834.75		8.40	20
Distribution 1			(AM) Register Replacement			60.00			
Wall 2 [North]	4.20	15.25	(ES) Cellulose DP R-13	3.90	117.02	391.50	391.50	4.10	30

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8



Take note of the individual measure SIRs. Additional information on the following page.

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HEAT Enterprise

HOME

CLIENT INFORMATION

▼ WAP

Client Job List

Audit Information

Wap Document

Questionnaire

Priority Audit

Selected Measures

▼ WEATHERIZATION

Heating/Cooling

Dashboard

Attic

Wall

Window/Door

Basement/Floor

Air Infiltration

Ashrae Ventilation

Combustion Test

CO Test

Combustion Safety

Other Measures

► BASELOAD

► HOT WATER

► WORK ORDER

Upload Photo

▼ ENERGY SAVINGS

Energy Savings

Modeling Report

Quick Home Audit

Energy Saving Measures

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Appliance 1	---	---	(ES) LED - 75w equivalent	2.54	60.92	202.20		9.70	37
Distribution 1	---	8.00	Distribution Measures	14.97	299.47	834.75		8.40	20
Distribution 1			(AM) Register Replacement			60.00			
Wall 2 [North]	4.20	15.25	(ES) Cellulose DP R-13	3.90	117.02	391.50	391.50	4.10	30
Wall 2 [North]			(AM) Install Chair Rail			250.00			
Wall 4 [East]	4.20	15.25	(ES) Cellulose DP R-13	1.86	55.88	195.30	195.30	3.92	30
Wall 4 [East]			(AM) Install Chair Rail			125.00			
Wall 3 [West]	4.20	15.25	(ES) Cellulose DP R-13	1.85	55.63	195.30	195.30	3.90	30
Wall 3 [West]			(AM) Install Chair Rail			125.00			
Domestic Hot Water	---	---	(ES) DWH Insulate H/C 6"	0.22	2.81	20.71		3.69	13
Wall 1 [South]	4.20	15.25	(ES) Cellulose DP R-13	2.63	78.78	391.50	391.50	2.76	30
Wall 1 [South]			(AM) Install Chair Rail			250.00			
Domestic Hot Water	---	---	(ES) LF Shower Head Install	0.12	0.85	17.16		1.45	7
Basement Floor 1	4.42	31.74	(ES) Floor Insulation R-30	4.65	93.06	1712.50	1712.50	1.36	20
Domestic Hot Water	---	---	(ES) DWH Tank-Wrap	0.48	7.19	150.00		1.28	15
Domestic Hot Water	---	---	(ES) LF Aerator Install	0.11	0.76	17.26		1.28	7
Heating Cooling 2	---	---	(ES) HP (HSPF 9.0, SEER 16, 30K/30K)	6.46	96.97	5000.00		0.52	15
Infiltration	---	---	Total Air Infiltration	0.88	8.75	560.45	560.45	0.44	10
Attic 1	30.69	51.69	(ES) FG LF R-21	0.64	19.11	1112.50	1112.50	0.30	30
Attic 1			(AM) Baffles			342.00			

Records: 1 - 20 of 20

Weatherization

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Distribution 1	---	8.00	Distribution Measures	14.97	299.47	834.75		8.40	20
Distribution 1			(AM) Register Replacement			60.00			
Wall 2 [North]	4.20	15.25	(ES) Cellulose DP R-13	3.90	117.02	391.50	391.50	4.10	30

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Guide to the previous page

- Measures circled in (Black):
 - Are being funded 100% by a non Wx funding source. (In this example)
 - Has a measure SIR above the 1.0 threshold
 - Is modeled at full cost (Material and Labor)
- As an example, measures circled in green are permitted to be left in the HEAT audit if the following conditions are met:
 - Measures are modeled at full cost (Material and Labor)
 - Measures **MUST** have the appropriate non DOE funding source assigned. (Measure SIR below the 1.0 threshold)
 - Job SIR is above a 1.0
- The measure circled in blue is air infiltration. It is the **ONLY** Wx measure allowed with an SIR below the 1.0 threshold that can be funded with DOE funds.
- Measures not circled are funded 100% by DOE WAP. (In this example)



The appropriate funding source must be selected for all measures that don't meet DOE's SIR requirements or that is not permitted by DOE WAP.



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HEAT Enterprise

HOME

CLIENT INFORMATION

WAP

- Client Job List
- Audit Information
- Wap Document
- Questionnaire
- Priority Audit
- Selected Measures**

WEATHERIZATION

- Heating/Cooling
- Dashboard
- Attic
- Wall
- Window/Door
- Basement/Floor
- Air Infiltration
- Ashrae Ventilation
- Combustion Test
- CO Test
- Combustion Safety
- Other Measures

BASELOAD

HOT WATER






















WORK ORDER

- Upload Photo

ENERGY SAVINGS

- Energy Savings
- Modeling Report
- Quick Home Audit

SELECTED MEASURES Braiding Example (Single family home using single family modeling)

Actions	Measure	Section	Quantity	Unit	Unit Material Cost	Unit Labor Cost	Total Material Cost	Total Labor Cost	Total Cost	Funding Source	Vendor	Inspection Date	Comment
  	(ES) FG LF R-21	Attic 1	1,250	SF	0.38	0.51	475.00	637.50	1,112.50	Other Funding	J&J Weatherization, Inc.		Add an additional R-21 or blown FG in the attic. (Measure is funded 100% by utility program)
  	(ES) Floor Insulation R-30	Basement Floor 1	1,250	SF	0.84	0.53	1,050.00	662.50	1,712.50	Other Funding	J&J Weatherization, Inc.		
  	(ES) HP (HSPF 9.0, SEER 16, 30K/30K)	Heating Cooling 2	1	EA	3,500	1,500	3,500.00	1,500.00	5,000.00	Other Funding	J&J Weatherization, Inc.		The heating system is being funded 100% by utility funds. No Wx.
  	(ES) LED - 75w equivalent	Appliance 1	15	EA	8.15	5.33	122.25	79.95	202.20	Leveraged	J&J Weatherization, Inc.		
  	(ES) LF Aerator Install	Hot Water	2	EA	2.07	6.56	4.14	13.12	17.26	Leveraged	J&J Weatherization, Inc.		
  	(ES) LF Shower Head Install	Hot Water	1	EA	6.12	11.04	6.12	11.04	17.16	Leveraged	J&J Weatherization, Inc.		
  	(HS) ASHRAE - Single Point	Other Measure	1	EA	307.94	264.68	307.94	264.68	572.62	Leveraged			Install new inline ASHRAE compliant fan. Install 12"x12"x1" filter grill in the hallway and then exhaust fan out the gable end of the home with 6"R-8 flex duct. Total length of venting will be around 20'. Install one 12x12x filter and leave the client 5 extra filters. Provide client education about

Records: 1 - 27 of 27

Total Labor Cost 6,114.01
Total Material Cost 8,016.82
Total Cost 14,130.83

Funding Source Vendor

1: This value has been amended

3: This job has exceeded the state maximum quantity or cost



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Once the appropriate funding source(s) are selected run\recalculate the audit and select the “Lock Audit” button located at the bottom of the screen.

If you experience issues with Hancock contact a DHCD team member.

Records: 1 - 11 of 11

HEAT Enterprise

HOME

CLIENT INFORMATION

▼ WAP

- Client Job List
- Audit Information
- Wap Document
- Questionnaire
- Priority Audit
- Selected Measures

▶ WEATHERIZATION

▶ BASELOAD

▶ HOT WATER

▶ WORK ORDER

Upload Photo

▼ ENERGY SAVINGS

- Energy Savings
- Modeling Report
- Quick Home Audit

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Architectural Section Loads (all in mmbtu)

Section	Heating Pre-Load	Heating Post-Load	Cooling Pre-Load	Cooling Post-Load
Attic 1 (2x4 Unfloored Attic)	2.95	1.66	1.65	1.06
Basement Floor 1 (Basement Ceiling)	7.73	1.08	1.57	0.22
Basement Floor 2 (Sills Crawlspace)	0.00	0.00	0.00	0.00
Basement Floor 3 (Above Grade Basement Wall)	0.00	0.00	0.00	0.00
Door Type 1	0.58	0.58	0.26	0.26
Infiltration	10.65	8.87	3.58	2.98
Wall 1 [South] (2x4 Wall Finished w Siding)	5.12	1.36	3.57	1.03
Wall 2 [North] (2x4 Wall Finished w Siding)	7.20	1.98	2.42	0.67
Wall 3 [West] (2x4 Wall Finished w Siding)	3.09	0.84	1.92	0.54
Wall 4 [East] (2x4 Wall Finished w Siding)	3.08	0.85	1.93	0.53
Window Type 1	2.20	2.20	8.32	8.32
Total	42.60	19.42	25.22	15.61

Records: 1 - 11 of 11

Section Solar Gain (all in mmbtu)

Section	Heating Pre-Load	Heating Post-Load	Cooling Pre-Load	Cooling Post-Load
Attic 1 (2x4 Unfloored Attic)	0.48	0.28	0.50	0.29
Door Type 1	0.06	0.06	0.04	0.04
Wall 1 [South] (2x4 Wall Finished w Siding)	2.08	0.57	1.15	0.32
Wall 2 [North] (2x4 Wall Finished w Siding)	0.00	0.00	0.00	0.00
Wall 3 [West] (2x4 Wall Finished w Siding)	0.51	0.14	0.71	0.19
Wall 4 [East] (2x4 Wall Finished w Siding)	0.51	0.14	0.73	0.20
Window Type 1	5.51	5.51	5.72	5.72
Total	9.15	6.70	8.85	6.76

Records: 1 - 7 of 7

Print Lock Audit Unlock Audit

Modeling Engine Version: 1.1.0.1, executed by David Caldwell DHCD at 01/12/2023 09:30:34

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Save copies of the finalized Energy Savings Report and Data Input Report within the WAP document screen.



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HEAT Enterprise

HOME

CLIENT INFORMATION

▼ WAP

Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures

► WEATHERIZATION

► BASELOAD

► HOT WATER

► WORK ORDER

Upload Photo

▼ ENERGY SAVINGS

Energy Savings
Modeling Report
Quick Home Audit

WAP DOCUMENT Braiding Example (Single family home using single family modeling)

Actions	Document	Complete/Not Required	Received Date	Notes	Attachment File
	A.) Heat Energy Savings Report (Containing measures with SIR below 1.0)				
	B.) Data Input Report (Including measure with SIR below 1.0)				
	* C.) Heat Energy Saving Report (Finalized Audit)	Complete	01/12/2023		Braided ESR finalized audit.pdf
	* D.) Data Input Report (Finalized Audit)	Complete	01/12/2023		Braiding DIR Finalized audit DIR.xls
	E.) Heat Energy Savings report (Cost engineered)				
	F.) Data Input Report (Cost Engineered)				
	G.) Manual J Load Calculation				
	H.) ASHRAE calculation (Pre)				
	I.) ASHRAE calculation (actual)				
	J.) CAZ worst case depressurization test (Pre)				
	K.) CAZ worst case depressurization test (Post)				
	L.) Combustion Appliance Testing (Pre)				
	M.) Combustion Appliance Testing (Post)				
	* N.) QCI Form				
	O.) Sub Contractor Invoices				
	P.) Agency\ Contractor Documents				
	Q.) Site photos (PDF)				
	R.) Work Orders				
	Z.) Client Education Documents				
	Z.) Lead Renovation Recordkeeping Checklist				
	Z.) Lead Test Documentation Form				
	Z.) NEAT /MHEA Audit if needed				
	Z.) Owner Acceptance of Work				
	Z.) TBD-1				
	Z.) TBD-2				
	Z.) TBD-3				



Next Steps

- Issue work orders.
- Complete the installation of the measures.
- Complete the “Installation” Screen in Hancock.
- Complete the “Inspection” Screen in Hancock.
- Ensure the correct funding sources have been applied to each measure.
 - Strong and clear communication between auditors and admin staff assigning funding sources is required here to avoid disallowed cost.
- Complete Quality Control Inspection and make any corrections if needed.
- Save all inspection reports and supporting documentation.
- Submit final invoices to DHCD for reimbursement.



Co-Funding

Energy Modeling (HEAT)





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Select Weatherization from the Job Type dropdown

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HEAT Enterprise

HOME
CLIENT INFORMATION
▼ WAP
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
▶ WEATHERIZATION
▶ BASELOAD
▶ HOT WATER
▶ WORK ORDER
Upload Photo
▼ ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit

AUDIT INFORMATION Co Funding Example (Single family home using single family modeling)

Site Assessment [Copy Job From](#)

First Name	Co Funding	Last Name	Example
WAP Priority	3	Agency	Virginia DHCD
Job Number*	2097066131	Auditor	---
Job Type*	Weatherization	Job Status*	Audited
Assessment Date	---		
Complete Date	---		
Audit Type	Emergency No Heat LIHEAP Time Sensitive Utility		Tier
<input type="checkbox"/> Need Approval			
<input type="checkbox"/> Deferred			

Nearest Weatherization

State **Virginia** Location **Richmond**

House Information

Building Type*	Wood Frame Home with Crawl Space and Open Joist Attic
DHW Heating	Electric
Basement Type	Crawl Space
# of Smokers&Pets	0
# of Woodstoves	0
# of Fireplaces	0
# of Unvented Heaters	0
# of Bedrooms	3
Year Built*	2000

☐ Knob&Tube
☐ Asbestos (Old)
☐ Lead Paint
☐ Moisture Problems
☐ VOC
☐ Built before 1979

Historic Preservation Review

Historic Review* 2a Exempt due to age (50 years old or under)



Fill out the assessment date (Date the auditor was on site) and select the name of the auditor

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HEAT Enterprise

HOME
CLIENT INFORMATION
▼ WAP
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
► WEATHERIZATION
► BASELOAD
► HOT WATER
► WORK ORDER
Upload Photo
▼ ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit

AUDIT INFORMATION Co Funding Example (Single family home using single family modeling)

Site Assessment [Copy Job From](#)

First Name	Co Funding	Last Name	Example
WAP Priority	3	Agency	Virginia DHCD
Job Number*	2097066131	Auditor	David Caldwell DHCD
Job Type*	Weatherization	Job Status*	Audited
Assessment Date	12/08/2022		
Complete Date	None	Furnace Tech	
Audit Type	Full House Audit	Coaching Date	
<input type="checkbox"/> Need A			
<input type="checkbox"/> Defe			

Nearest Weatherization Location

State: Virginia Location: Richmond

House Information

Building Type*	Wood Frame Home with Crawl Space and Open Joist Attic
DHW Heating	Electric
Basement Type	Crawl Space
# of Smokers&Pets	0
# of Woodstoves	0
# of Fireplaces	0
# of Unvented Heaters	0
# of Bedrooms	3
Year Built*	2000
<input type="checkbox"/> Knob&Tube	
<input type="checkbox"/> Asbestos (Old)	
<input type="checkbox"/> Lead Paint	
<input type="checkbox"/> Moisture Problems	
<input type="checkbox"/> VOC	
<input type="checkbox"/> Built before 1979	

Historic Preservation Review

Historic Review* 2a Exempt due to age (50 years old or under)



Select “Full House Audit” from the Audit Type dropdown. Fill out the rest of the Audit Information screen and save!

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HEAT Enterprise

HOME
CLIENT INFORMATION
▼ WAP
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
► WEATHERIZATION
► BASELOAD
► HOT WATER
► WORK ORDER
Upload Photo
▼ ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit

AUDIT INFORMATION Co Funding Example (Single family home using single family modeling)

Site Assessment [Copy Job From](#)

First Name	Co Funding	Last Name	Example
WAP Priority	3	Agency	Virginia DHCD
Job Number*	2097066131	Auditor	David Caldwell DHCD
Job Type*	Weatherization	Job Status*	Audited
Assessment Date	12/08/2022		
Complete Date	None	Furnace Tech	
Audit Type	Full House Audit	Coaching Date	
<input type="checkbox"/> Need Approval			
<input type="checkbox"/> Deferred			

Nearest Weather Station

State	Virginia	Location	Richmond
-------	----------	----------	----------

House Information

Building Type*	Wood Frame Home with Crawl Space and Open Joist Attic
DHW Heating	Electric
Basement Type	Crawl Space
# of Smokers&Pets	0
# of Woodstoves	0
# of Fireplaces	0
# of Unvented Heaters	0
# of Bedrooms	3
Year Built*	2000


<input type="checkbox"/> Knob&Tube
<input type="checkbox"/> Asbestos (Old)
<input type="checkbox"/> Lead Paint
<input type="checkbox"/> Moisture Problems
<input type="checkbox"/> VOC
<input type="checkbox"/> Built before 1979

Historic Preservation Review

Historic Review*	2a Exempt due to age (50 years old or under)
------------------	--




Once all applicable measures are selected. Assign the Leveraged funding source to all measure. Measures must be at full cost (Material and labor)



If you experience issues with Hancock contact a DHCD team member.

























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HOME
CLIENT INFORMATION
▼ WAP
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
▼ WEATHERIZATION
Heating/Cooling
Dashboard
Attic
Wall
Window/Door
Basement/Floor
Air Infiltration
Ashrae Ventilation
Combustion Test
CO Test
Combustion Safety
Other Measures
► BASELOAD
► HOT WATER
► WORK ORDER
Upload Photo
▼ ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit

SELECTED MEASURES Co Funding Example (Single family home using single family modeling)

Actions	Measure	Section	Quantity	Unit	Unit Material Cost	Unit Labor Cost	Total Material Cost	Total Labor Cost	Total Cost	Funding Source	Vendor	Inspection Date	Comment
  	(AM) Baffles	Attic 1	50	EA	2.84	4	142.00	200.00	342.00	Leveraged	J&J Weatherization, Inc.		Baffles are needed for proper attic insulation. (Funded 100% with utility funds)
  	(AM) Install Chair Rail	Wall 1	50	LF	3.5	1.5	175.00	75.00	250.00	Leveraged	J&J Weatherization, Inc.		Plug all holes drilled in exterior wall to add insulation and install chair rail over the hole to hide the holes that were drilled to add the wall insulation.
  	(AM) Install Chair Rail	Wall 2	50	LF	3.5	1.5	175.00	75.00	250.00	Leveraged	J&J Weatherization, Inc.		
  	(AM) Install Chair Rail	Wall 3	25	LF	3.5	1.5	87.50	37.50	125.00	Leveraged	J&J Weatherization, Inc.		
  	(AM) Install Chair Rail	Wall 4	25	LF	3.5	1.5	87.50	37.50	125.00	Leveraged	J&J Weatherization, Inc.		
  	(AM) Register Replacement	Distribution 1	2	EA	15	15	30.00	30.00	60.00	Leveraged	J&J Weatherization, Inc.		Replace 6" round ceiling register in the living room and Br-1
  	(ES) Air Seal - Blower Door Guided	Infiltration	1	SF	169.78	390.67	169.78	390.67	560.45	Leveraged	J&J Weatherization, Inc.		
  	(ES) Cellulose DP R-13	Wall 1	359.17	SF	0.53	0.56	190.36	201.14	391.50	Leveraged	J&J Weatherization, Inc.		Dense pack all exterior walls with Cellulose insulation. Small amount of furniture will need to be moved around to access exterior walls.

Records: 1 - 26 of 26


Total Labor Cost 4,614.01
Total Material Cost 4,516.82
Total Cost 9,130.83

Funding Source Leveraged Vendor Set

1: This value has been amended

Print Report

3: This job has exceeded the state maximum quantity or cost

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Reminder


Copies of the Energy Savings Report and Data Input Report containing measures with an SIR less than 1.0 **must be saved under WAP documents before moving forward.**



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Co-funded measures MUST remain the last measures on the list of ECMs and maintain a minimum SIR of 1.0. Sub grantees may have to adjust the labor and material cost and recalculate the audit multiple times.



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HEAT Enterprise

HOME

CLIENT INFORMATION

▼ WAP

- Client Job List
- Audit Information
- Wap Document
- Questionnaire
- Priority Audit
- Selected Measures

▼ WEATHERIZATION

- Heating/Cooling Dashboard
- Attic
- Wall
- Window/Door
- Basement/Floor
- Air Infiltration
- Ashrae Ventilation
- Combustion Test
- CO Test
- Combustion Safety
- Other Measures

► BASELOAD

► HOT WATER

► WORK ORDER

- Upload Photo

▼ ENERGY SAVINGS

- Energy Savings
- Modeling Report
- Quick Home Audit

Annual Cooling Architectural Load (MMBTU)24.9915.75

Records: 1 - 13 of 13


Energy Saving Measures

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Distribution 1	---	8.00	Distribution Measures	13.67	273.49	834.75		12.85	20
Distribution 1			(AM) Register Replacement			60.00			
Appliance 1	---	---	(ES) LED - 75w equivalent	2.54	60.92	202.20		9.70	37
Wall 2 [North]	4.20	15.25	(ES) Cellulose DP R-13	4.30	128.99	391.50	391.50	4.52	30
Wall 2 [North]			(AM) Install Chair Rail			250.00			
Wall 4 [East]	4.20	15.25	(ES) Cellulose DP R-13	2.04	61.08	195.30	195.30	4.29	30
Wall 4 [East]			(AM) Install Chair Rail			125.00			
Wall 3 [West]	4.20	15.25	(ES) Cellulose DP R-13	2.03	60.83	195.30	195.30	4.27	30
Wall 3 [West]			(AM) Install Chair Rail			125.00			
Domestic Hot Water	---	---	(ES) DWH Insulate H/C 6'	0.22	2.81	20.71		3.69	13
Wall 1 [South]	4.20	15.25	(ES) Cellulose DP R-13	2.86	85.80	391.50	391.50	3.01	30
Wall 1 [South]			(AM) Install Chair Rail			250.00			
Domestic Hot Water	---	---	(ES) LF Shower Head Install	0.12	0.85	17.16		1.45	7
Domestic Hot Water	---	---	(ES) DWH Tank-Wrap	0.48	7.19	150.00		1.28	15
Domestic Hot Water	---	---	(ES) LF Aerator Install	0.11	0.76	17.26		1.28	7
Attic 1	23.29	44.29	(ES) FG LF R-21	1.63	48.84	887.50	887.50	1.00	30
Attic 1			(AM) Baffles			210.00			
Basement Floor 1	8.42	36.47	(ES) Floor Insulation R-30	2.41	48.23	1212.50	1212.50	1.00	20
Infiltration	---	---	Total Air Infiltration	1.46	14.62	560.45	560.45	0.74	10

Records: 1 - 19 of 19

Weatherization

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Distribution 1	---	8.00	Distribution Measures	13.67	273.49	834.75		12.85	20
Distribution 1			(AM) Register Replacement			60.00			



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Reminder

Air sealing circled in **blue** on the previous page is the sole exception and may fall below co-funded measures on the list of Energy saving measures. Air sealing is also exempt from the 1.0 SIR requirements.



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HOME

CLIENT INFORMATION

▼ WAP

- Client Job List
- Audit Information
- Wap Document
- Questionnaire
- Priority Audit
- Selected Measures

▼ WEATHERIZATION

- Heating/Cooling
- Dashboard
- Attic
- Wall
- Window/Door
- Basement/Floor
- Air Infiltration
- Ashrae Ventilation
- Combustion Test
- CO Test
- Combustion Safety
- Other Measures

► BASELOAD

► HOT WATER

► WORK ORDER

- Upload Photo

▼ ENERGY SAVINGS

- Energy Savings
- Modeling Report
- Quick Home Audit

Records: 1 - 11 of 11

Architectural Section Loads (all in mmbtu)

Section	Heating Pre-Load	Heating Post-Load	Cooling Pre-Load	Cooling Post-Load
Attic 1 (2x4 Unfloored Attic)	3.89	1.94	2.17	1.23
Basement Floor 1 (Basement Ceiling)	4.06	0.94	0.82	0.19
Basement Floor 2 (Sills Crawlspace)	0.00	0.00	0.00	0.00
Basement Floor 3 (Above Grade Basement Wall)	0.00	0.00	0.00	0.00
Door Type 1	0.58	0.58	0.26	0.26
Infiltration	10.65	8.87	3.58	2.98
Wall 1 [South] (2x4 Wall Finished w Siding)	5.12	1.36	3.57	1.03
Wall 2 [North] (2x4 Wall Finished w Siding)	7.20	1.98	2.42	0.67
Wall 3 [West] (2x4 Wall Finished w Siding)	3.09	0.84	1.92	0.54
Wall 4 [East] (2x4 Wall Finished w Siding)	3.08	0.85	1.93	0.53
Window Type 1	2.20	2.20	8.32	8.32
Total	39.87	19.56	24.99	15.75

Records: 1 - 11 of 11

Section Solar Gain (all in mmbtu)

Section	Heating Pre-Load	Heating Post-Load	Cooling Pre-Load	Cooling Post-Load
Attic 1 (2x4 Unfloored Attic)	0.63	0.33	0.65	0.34
Door Type 1	0.06	0.06	0.04	0.04
Wall 1 [South] (2x4 Wall Finished w Siding)	2.08	0.57	1.15	0.32
Wall 2 [North] (2x4 Wall Finished w Siding)	0.00	0.00	0.00	0.00
Wall 3 [West] (2x4 Wall Finished w Siding)	0.51	0.14	0.71	0.19
Wall 4 [East] (2x4 Wall Finished w Siding)	0.51	0.14	0.73	0.20
Window Type 1	5.51	5.51	5.72	5.72
Total	9.30	6.75	9.00	6.81

Records: 1 - 7 of 7

Print

Lock Audit

Unlock Audit

Modeling Engine Version: 1.1.0.1, executed by David Caldwell DHCD at 01/11/2023 12:57:48

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Save copies of the finalized Energy Savings Report and Data Input Reports under WAP Documents

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HOME

CLIENT INFORMATION

▼ **WAP**

Client Job List

Wap Document

Questionnaire

Priority Audit

Save Measures

▼ **WAP DOCUMENT**

Wap Document

Attic

Wall

Window/Door

Basement/Floor

Air Infiltration

Ashrae Ventilation

Combustion Test

CO Test

Combustion Safety

Other Measures

► **BASELOAD**

► **HOT WATER**

► **WORK ORDER**

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▼ **ENERGY SAVINGS**

Energy Savings

Modeling Report

Quick Home Audit

WAP DOCUMENT Co Funding Example (Single family home using single family modeling)

Actions	Document	Complete/Not Required	Received Date	Notes	Attachment File
	A.) Heat Energy Savings Report (Containing measures with SIR below 1.0)	Complete	01/11/2023		Co-Funded ESR containing measures with a 1.0 SIR or less.pdf
	B.) Data Input Report (Including measure with SIR below 1.0)	Complete	01/11/2023		Co-Funded DIR containing measures with a 1.0 SIR or less.xls
	* C.) Heat Energy Saving Report (Finalized Audit)	Complete	01/11/2023		Co-Funded ESR Finalized audit.pdf
	* D.) Data Input Report (Finalized Audit)	Complete	01/11/2023		Co-Funded DIR Finalized audit.xls
	E.) Heat Energy Savings report (Cost engineered)				
	F.) Data Input Report (Cost Engineered)				
	G.) Manual J Load Calculation				
	H.) ASHRAE calculation (Pre)				
	I.) ASHRAE calculation (actual)				
	J.) CAZ worst case depressurization test (Pre)				
	K.) CAZ worst case depressurization test (Post)				
	L.) Combustion Appliance Testing (Pre)				
	M.) Combustion Appliance Testing (Post)				
	* N.) QCI Form				
	O.) Sub Contractor Invoices				
	P.) Agency/ Contractor Documents				
	Q.) Site photos (PDF)				
	R.) Work Orders				
	Z.) Client Education Documents				
	Z.) Lead Renovation Recordkeeping Checklist				
	Z.) Lead Test Documentation Form				
	Z.) NEAT /MHEA Audit if needed				
	Z.) Owner Acceptance of Work				
	Z.) TBD-1				
	Z.) TBD-2				
	Z.) TBD-3				

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Reminder

Note the finalized Energy Savings Report and Data Input Report must be saved under WAP documents before moving forward.



Select the Add Job button from within the Client Job List screen

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HEAT Enterprise

CLIENT INFORMATION

▼ **WAP**

- Client Job List**
- Add Information
- Wap Comment
- Quick Home
- Report Measures

▼ **WEATHERIZATION**

- Dashboard
- Attic
- Wall
- Window/Door
- Basement/Floor
- Air Infiltration
- Ashrae Ventilation
- Combustion Test
- CO Test
- Combustion Safety
- Other Measures

► **BASELOAD**

► **HOT WATER**

► **WORK ORDER**

- Upload Photo

▼ **ENERGY SAVINGS**

- Energy Savings
- Modeling Report
- Quick Home Audit

CLIENT JOB LIST Co Funding Example (Single family home using single family modeling)

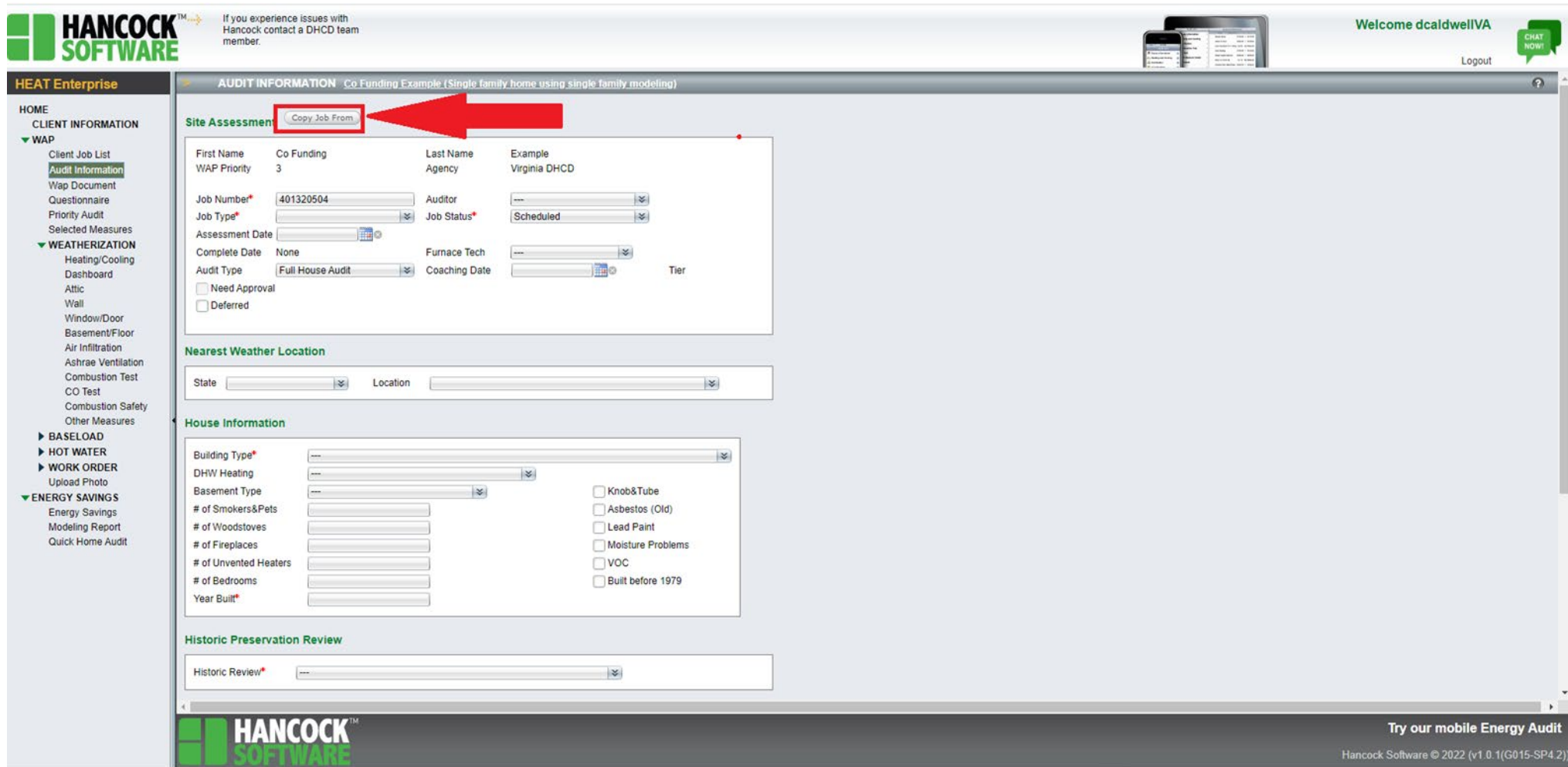
Actions	Complete Date	Job Number	Status	First Name	Last Name	Street	City	County	Phone
		2097066131	Audited	Co Funding	Example	Main	RICHMOND	HENRICO CO	

Records: 1 - 1 of 1 - Pages: << < 1 > >> (out of 1)

Add Job

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 This will create a second job under the same client record. Select the “Copy Job From” button at the top of the page.



The screenshot displays the Hancock Software HEAT Enterprise web application. The interface includes a top navigation bar with the Hancock Software logo, a user welcome message, and a chat button. A left sidebar contains a navigation menu with categories like HOME, CLIENT INFORMATION, WAP, WEATHERIZATION, BASELOAD, HOT WATER, WORK ORDER, and ENERGY SAVINGS. The main content area is titled 'AUDIT INFORMATION' and shows a form for a 'Co Funding Example (Single family home using single family modeling)'. A red arrow points to the 'Copy Job From' button located at the top of the 'Site Assessment' section. The form contains various input fields for job details, including First Name, Last Name, Agency, Job Number, Auditor, Job Type, Job Status, Assessment Date, Complete Date, Furnace Tech, Audit Type, Coaching Date, and Tier. There are also checkboxes for 'Need Approval' and 'Deferred'. Below the 'Site Assessment' section is the 'Nearest Weather Location' section with dropdowns for State and Location. The 'House Information' section includes dropdowns for Building Type, DHW Heating, and Basement Type, as well as input fields for the number of smokers/pets, woodstoves, fireplaces, unvented heaters, and bedrooms, and the year built. There are also checkboxes for 'Knob&Tube', 'Asbestos (Old)', 'Lead Paint', 'Moisture Problems', 'VOC', and 'Built before 1979'. The 'Historic Preservation Review' section has a dropdown for 'Historic Review'. The bottom of the page features the Hancock Software logo, a link to 'Try our mobile Energy Audit', and a copyright notice: 'Hancock Software © 2022 (v1.0.1(G015-SP4.2))'.



The software will display this prompt. Select ok to move forward

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Welcome dcaldwellIVA Logout

HEAT Enterprise

HOME
CLIENT INFORMATION
▼ WAP
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
▼ WEATHERIZATION
Heating/Cooling
Dashboard
Attic
Wall
Window/Door
Basement/Floor
Air Infiltration
Ashrae Ventilation
Combustion Test
CO Test
Combustion Safety
Other Measures
► BASELOAD
► HOT WATER
► WORK ORDER
Upload Photo
▼ ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit

AUDIT INFORMATION Co Funding Example (Single family home using single family modeling)

Site Assessment Copy Job From

First Name	Co Funding	Last Name	Example
WAP Priority	3	Agency	Virginia DHCD
Job Number*	401320504	Auditor	---
Job Type*	---	Job Status*	Scheduled
Assessment Date	---		
Complete Date	None	Furnace Tech	---
Audit Type	Full House Audit	Coaching Date	---
<input type="checkbox"/> Need Approval		Tier	
<input type="checkbox"/> Deferred			

Nearest Weather Location

State: --- Location: ---

House Information

Building Type*	---	<input type="checkbox"/> Knob&Tube
DHW Heating	---	<input type="checkbox"/> Asbestos (Old)
Basement Type	---	<input type="checkbox"/> Lead Paint
# of Smokers&Pets	---	<input type="checkbox"/> Moisture Problems
# of Woodstoves	---	<input type="checkbox"/> VOC
# of Fireplaces	---	<input type="checkbox"/> Built before 1979
# of Unvented Heaters	---	
# of Bedrooms	---	
Year Built*	---	

Historic Preservation Review

Historic Review* ---

Prompt

⚠ Copying another job will overwrite all weatherization, baseload, hot water and general audit information you have already entered. ?
Do you wish to continue?

Ok Cancel









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Select the Weatherization job from the list displayed. *Hint - Enter the job number in search field to locate quickly.

Copy Job From

Action	Building Type	Job Number	First Name	Last Name	City	County
 	Owner-Occupied Single Family Site Built	2097066131	Co Funding	Example	RICHMOND	HENRI
 	Owner-Occupied Single Family Site Built	472669392	Braiding	Example	RICHMOND	HENRI
 	Owner-Occupied Single Family Site Built	2129688643	DOE	Audit Example - SB1A	RICHMOND	HENRI
 	Owner-Occupied Single Family Site Built	738937486-1	DOE	Site Built SB1A-1	RICHMOND	HENRI

Contains Contains Contains Contains Contains Contains

Records: 1 - 4 of 4 - Pages: << < 1 > >> (out of 1)

Cancel Ok



Select the appropriate item from the Job Type dropdown box.

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Welcome dcaldwellVA Logout [CHAT NOW!](#)

HEAT Enterprise

HOME
CLIENT INFORMATION
▼ WAP
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
► WEATHERIZATION
► BASELOAD
► HOT WATER
► WORK ORDER
Upload Photo
▼ ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit

AUDIT INFORMATION Co Funding Example (Single family home using single family modeling)

Site Assessment [Copy Job From](#)

First Name Co Funding Last Name Example
WAP Priority 3 Agency Virginia DHCD

Job Number* 1083628072 Auditor ---
Job Type* **Utility** Job Status* Scheduled
Assessment Date ---
Complete Date ---
Audit Type
☐ Need Approval
☐ Deferred
Emergency No Heat
LIHEAP
Time Sensitive
Utility
Weatherization
Weatherization Readiness Fund (WRF)

Nearest Weather
State Virginia Location Richmond

House Information
Building Type* Wood Frame Home with Crawl Space and Open Joist Attic
DHW Heating Electric
Basement Type Crawl Space
of Smokers&Pets 0
of Woodstoves 0
of Fireplaces 0
of Unvented Heaters 0
of Bedrooms 3
Year Built* 2000
☐ Knob&Tube
☐ Asbestos (Old)
☐ Lead Paint
☐ Moisture Problems
☐ VOC
☐ Built before 1979

Historic Preservation Review
Historic Review* 2a Exempt due to age (50 years old or under)

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Select the assessment date (Date the auditor was on site) and select the name of the auditor

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HEAT Enterprise

HOME
CLIENT INFORMATION
▼ WAP
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
► WEATHERIZATION
► BASELOAD
► HOT WATER
► WORK ORDER
Upload Photo
▼ ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit

AUDIT INFORMATION Co Funding Example (Single family home using single family modeling)

Site Assessment [Copy Job From](#)

First Name	Co Funding	Last Name	Example
WAP Priority	3	Agency	Virginia DHCD
Job Number*	1083628072	Auditor	David Caldwell DHCD
Job Type*	Weatherization	Job Status*	Scheduled
Assessment Date	12/08/2022		
Complete Date	None	Furnace Tech	
Audit Type	House Audit	Coaching Date	
<input type="checkbox"/> Need App			Tier
<input type="checkbox"/> Deferred			

Nearest Weather Station

State: Virginia Location: Richmond

House Information

Building Type* Wood Frame Home with Crawl Space and Open Joist Attic

DHW Heating Electric

Basement Type Crawl Space

of Smokers&Pets 0

of Woodstoves 0

of Fireplaces 0

of Unvented Heaters 0

of Bedrooms 3

Year Built* 2000

☐ Knob&Tube
☐ Asbestos (Old)
☐ Lead Paint
☐ Moisture Problems
☐ VOC
☐ Built before 1979

Historic Preservation Review

Historic Review* 2a Exempt due to age (50 years old or under)

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For simplicity sub grantees may choose the “Priority Audit” type from the audit type dropdown. Fill out the rest of the audit information screen and save!

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HEAT Enterprise

HOME
CLIENT INFORMATION
▼ WAP
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
▼ WEATHERIZATION
Heating/Cooling
Dashboard
Attic
Wall
Window/Door
Basement/Floor
Air Infiltration
Ashrae Ventilation
Combustion Test
CO Test
Combustion Safety
Other Measures
► BASELOAD
► HOT WATER
► WORK ORDER
Upload Photo
▼ ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit

AUDIT INFORMATION Co Funding Example

Site Assessment [Copy Job From](#)

First Name	Co Funding	Last Name	Example
WAP Priority	3	Agency	Virginia DHCD
Job Number*	1083628072	Auditor	David Caldwell DHCD
Job Type*	Utility	Job Status*	Scheduled
Assessment Date	12/08/2022		
Complete Date	None	Furnace Tech	
Audit Type	Priority Audit / Other	Coaching Date	
<input type="checkbox"/> Need Approval	Full House Audit		Tier
<input type="checkbox"/> Deferred	Priority Audit / Other		

Nearest Weather
State Virginia Richmond

House Information

Building Type*	Wood Frame Home with Crawl Space and Open Joist Attic
DHW Heating	Electric
Basement Type	Crawl Space
# of Smokers&Pets	0
# of Woodstoves	0
# of Fireplaces	0
# of Unvented Heaters	0
# of Bedrooms	3
Year Built*	2000

Knob&Tube
Asbestos (Old)
Lead Paint
Moisture Problems
VOC
Built before 1979

Historic Preservation Review

Historic Review* 2a Exempt due to age (50 years old or under)

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Once the audit information is saved a second job will appear on the Client Job List screen.

HANCOCK SOFTWARE HEAT Enterprise

CLIENT JOB LIST Co Funding Example (Single family home using single family modeling)

Actions	Complete Date	Job Number	Status	First Name	Last Name	Street	City	County	Phone
		2097066131	Audited	Co Funding	Example	Main	RICHMOND	HENRICO CO	
		1083628072	Scheduled	Co Funding	Example	Main	RICHMOND	HENRICO CO	

Records: 1 - 2 of 2 - Pages: 1 (out of 1)

Add Job



Remove all non-Co-funded measures from the selected measures screen

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HEAT Enterprise

HOME
CLIENT INFORMATION
▼ **WAP**
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
► **WEATHERIZATION**
► **BASELOAD**
► **HOT WATER**
► **WORK ORDER**
Upload Photo
▼ **ENERGY SAVINGS**
Energy Savings
Modeling Report
Quick Home Audit

SELECTED MEASURES Co Funding Example (Single family home using single family modeling)

Actions	Measure	Section	Quantity	Unit	Unit Material Cost	Unit Labor Cost	Total Material Cost	Total Labor Cost	Total Cost	Funding Source	Vendor	Inspection Date	Comment
	(AM) Baffles	Attic 1	50	EA	2.2	2	110.00	100.00	210.00	Leveraged	J&J Weatherization , Inc.		Baffles are needed for proper attic insulation.
	(AM) Install Chair Rail	Wall 1	50	LF	3.5	1.5	175.00	75.00	250.00	Leveraged	J&J Weatherization , Inc.		Plug air holes drilled in exterior wall to add insulation and install chair rail over the hole to hide the holes that were drilled to add the wall insulation.
	(AM) Install Chair Rail	Wall 2	50	LF	3.5	1.5	175.00	75.00	250.00	Leveraged	J&J Weatherization , Inc.		
	(AM) Install Chair Rail	Wall 3	25	LF	3.5	1.5	87.50	37.50	125.00	Leveraged	J&J Weatherization , Inc.		
	(AM) Install Chair Rail	Wall 4	25	LF	3.5	1.5	87.50	37.50	125.00	Leveraged	J&J Weatherization , Inc.		
	(AM) Register Replacement	Distribution 1	2	EA	15	15	30.00	30.00	60.00	Leveraged	J&J Weatherization , Inc.		Replace 6" round ceiling register in the living room and Br-1
	(ES) Air Seal - Blower Door Guided	Infiltration	1	SF	169.78	390.67	169.78	390.67	560.45	Leveraged			
	(ES) Cellulose DP R-13	Wall 1	359.17	SF	0.53	0.56	190.36	201.14	391.50	Leveraged	J&J Weatherization , Inc.		Dense pack all exterior walls with Cellulose insulation. Small amount of furniture will need to be moved around to access exterior walls.

Records: 1 - 26 of 26

Total Labor Cost 4,051.51
Total Material Cost 4,222.32
Total Cost 8,273.83

Funding Source Vendor

1: This value has been amended

3: This job has exceeded the state maximum quantity or cost

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Take note of the full cost of the co-funded measures in the initial audit run (Circled in green)

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HEAT Enterprise

HOME
CLIENT INFORMATION
▼ WAP
Client Job List
Audit Information
Wap Document
Questionnaire
Priority Audit
Selected Measures
▼ WEATHERIZATION
Heating/Cooling
Dashboard
Attic
Wall
Window/Door
Basement/Floor
Air Infiltration
Ashrae Ventilation
Combustion Test
CO Test
Combustion Safety
Other Measures
► BASELOAD
► HOT WATER
► WORK ORDER
Upload Photo
▼ ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit

Energy Saving Measures

Section	Pre-R	Post R	Measure	Savings (mmBtu/year)	Savings (mmBtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Distribution 1	---	8.00	Distribution Measures	13.67	273.49	834.75		12.85	20
Distribution 1			(AM) Register Replacement			60.00			
Appliance 1	---	---	(ES) LED - 75w equivalent	2.54	60.92	202.20		9.70	37
Wall 2 [North]	4.20	15.25	(ES) Cellulose DP R-13	4.30	128.99	391.50	391.50	4.52	30
Wall 2 [North]			(AM) Install Chair Rail			250.00			
Wall 4 [East]	4.20	15.25	(ES) Cellulose DP R-13	2.04	61.08	195.30	195.30	4.29	30
Wall 4 [East]			(AM) Install Chair Rail			125.00			
Wall 3 [West]	4.20	15.25	(ES) Cellulose DP R-13	2.03	60.83	195.30	195.30	4.27	30
Wall 3 [West]			(AM) Install Chair Rail			125.00			
Domestic Hot Water	---	---	(ES) DWH Insulate H/C 6"	0.22	2.81	20.71		3.69	13
Wall 1 [South]	4.20	15.25	(ES) Cellulose DP R-13	2.86	85.80	391.50	391.50	3.01	30
Wall 1 [South]			(AM) Install Chair Rail			250.00			
Domestic Hot Water	---	---	(ES) LF Shower Head Install	0.12	0.85	17.16		1.45	7
Domestic Hot Water	---	---	(ES) DWH Tank-Wrap	0.48	7.19	150.00		1.28	15
Domestic Hot Water	---	---	(ES) LF Aerator Install	0.11	0.76	17.26		1.28	7
Attic 1	23.29	44.29	(ES) FG LF R-21	1.63	48.84	1112.50	1112.50	0.75	30
Attic 1			(AM) Baffles			342.00			
Infiltration	---	---	Total Air Infiltration	1.46	14.62	560.45	560.45	0.74	10
Basement Floor 1	8.42	36.47	(ES) Floor Insulation R-30	2.41	48.23	1712.50	1712.50	0.71	20

Records: 1 - 19 of 19

Weatherization

Section	Pre-R	Post R	Measure	Savings (mmBtu/year)	Savings (mmBtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Distribution 1	---	8.00	Distribution Measures	13.67	273.49	834.75		12.85	20
Distribution 1			(AM) Register Replacement			60.00			
Wall 2 [North]	4.20	15.25	(ES) Cellulose DP R-13	4.30	128.99	391.50	391.50	4.52	30
Wall 2 [North]			(AM) Install Chair Rail			250.00			

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Take note of the max DOE allowed cost. Located in the finalized audit run. (Circled in Black)

HEAT Enterprise

HOME

CLIENT INFORMATION

▼ WAP

Client Job List

Audit Information

Wap Document

Questionnaire

Priority Audit

Selected Measures

▼ WEATHERIZATION

Heating/Cooling Dashboard

Attic

Wall

Window/Door

Basement/Floor

Air Infiltration

Ashrae Ventilation

Combustion Test

CO Test

Combustion Safety

Other Measures

► BASELOAD

► HOT WATER

► WORK ORDER

Upload Photo

▼ ENERGY SAVINGS

Energy Savings

Modeling Report

Quick Home Audit

Annual Cooling Architectural Load (MMBTU)

24.99

15.75

Records: 1 - 13 of 13

Energy Saving Measures

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Distribution 1	---	8.00	Distribution Measures	13.67	273.49	834.75		12.85	20
Distribution 1			(AM) Register Replacement			60.00			
Appliance 1	---	---	(ES) LED - 75w equivalent	2.54	60.92	202.20		9.70	37
Wall 2 [North]	4.20	15.25	(ES) Cellulose DP R-13	4.30	128.99	391.50	391.50	4.52	30
Wall 2 [North]			(AM) Install Chair Rail			250.00			
Wall 4 [East]	4.20	15.25	(ES) Cellulose DP R-13	2.04	61.08	195.30	195.30	4.29	30
Wall 4 [East]			(AM) Install Chair Rail			125.00			
Wall 3 [West]	4.20	15.25	(ES) Cellulose DP R-13	2.03	60.83	195.30	195.30	4.27	30
Wall 3 [West]			(AM) Install Chair Rail			125.00			
Domestic Hot Water	---	---	(ES) DWH Insulate H/C 6"	0.22	2.81	20.71		3.69	13
Wall 1 [South]	4.20	15.25	(ES) Cellulose DP R-13	2.86	85.80	391.50	391.50	3.01	30
Wall 1 [South]			(AM) Install Chair Rail			250.00			
Domestic Hot Water	---	---	(ES) LF Shower Head Install	0.12	0.85	17.16		1.45	7
Domestic Hot Water	---	---	(ES) DWH Tank-Wrap	0.48	7.19	150.00		1.28	15
Domestic Hot Water	---	---	(ES) LF Aerator Install	0.11	0.76	17.26		1.28	7
Attic 1	23.29	44.29	(ES) FG LF R-21	1.63	48.84	887.50	887.50	1.00	30
Attic 1			(AM) Baffles			210.00			
Basement Floor 1	8.42	36.47	(ES) Floor Insulation R-30	2.41	48.23	1212.50	1212.50	1.00	20
Infiltration	---	---	Total Air Infiltration	1.46	14.62	345	560.45	0.74	10


Records: 1 - 19 of 19

Weatherization

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Distribution 1	---	8.00	Distribution Measures	13.67	273.49	834.75		12.85	20
Distribution 1			(AM) Register Replacement			60.00			

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 VIRGINIA DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT
Partners for Better Communities

41


■ ■ Subtract finalized audit dollars from the Initial audit run. (Green – Black)

- (ES) FG LF R-21 $\$1112.5 - \$887.50 = \$225$
- (AM) Baffles $\$342.00 - \$210.00 = \$132$
- (ES) Floor Insulation R-30 $\$1712.50 - \$1212.50 = \$500$





Enter the difference or remaining balance to the appropriate measure. To adjust the total dollar, you will need to adjust the unit and labor cost accordingly



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CHAT NOW!

HEAT Enterprise

HOME

CLIENT INFORMATION

▼ WAP

- Client Job List
- Audit Information
- Wap Document
- Questionnaire
- Priority Audit
- Selected Measures

► WEATHERIZATION

► BASELOAD

► HOT WATER

► WORK ORDER

Upload Photo

▼ ENERGY SAVINGS

- Energy Savings
- Modeling Report
- Quick Home Audit

SELECTED MEASURES Co Funding Example (Single family home using single family modeling)

Actions	Measure	Section	Quantity	Unit	Unit Material Cost	Unit Labor Cost	Total Material Cost	Total Labor Cost	Total Cost	Funding Source	Vendor	Inspection Date	Comment
	(AM) Baffles	Attic 1	50	EA	1.64	1	82.00	50.00	132.00	Other Funding	J&J Weatherization, Inc.		Baffles are needed f
	(ES) FG LF R-21	Attic 1	1,250	SF	0.1	0.08	125.00	100.00	225.00	Other Funding	J&J Weatherization, Inc.		Add an additional R-
	(ES) Floor Insulation R-30	Basement Floor 1	1,250	SF	0.2	0.2	250.00	250.00	500.00	Other Funding	J&J Weatherization, Inc.		


Records: 1 - 3 of 3

Total Labor Cost 400.00
Total Material Cost 457.00
Total Cost 857.00

Funding Source Vendor

1: This value has been amended

3: This job has exceeded the state maximum quantity or cost



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Next Steps

- Issue work orders.
- Complete the installation of the measures.
- Complete the “Installation” Screen in Hancock.
- Complete the “Inspection” Screen in Hancock.
- Ensure the correct funding sources have been applied to each measure.
 - Strong and clear communication between auditors and admin staff assigning funding sources is required here to avoid disallowed cost.
- Complete Quality Control Inspection and make any corrections if needed.
- Save all inspection reports and supporting documentation.
- Submit final invoices to DHCD for reimbursement.
- Sub grantees will need to perform these tasks for each job record.

Energy Saving Report

Funding Source:

Report Date: 07/11/2023

Client Name: Braiding
Example

Client Address: 123 Main Street RICHMOND VA 22222

Job Number: 472669392

Location: Richmond, VA

Job SIR:1.8551

Job Cost: \$15130.83

Job Lifetime:21.72 Years

Annual Savings of 41.31 mmbtu

Lifetime Savings of 897.19
mmbtuTotal Fuel Cost
\$1650.00

Pre Heating Degree Days 3509.38

Post Heating Degree Days
3509.38Pre Cooling Degree Days
2010.00Post Cooling Degree Days
2010.00

System Design Capacity

Item	Pre	Post
Heating	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cooling	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Peak Heating Load (BTU/Hr)	56605.42	25814.78
Heating Output (BTU/Hr)	30000.00	30000.00
Cooling Output (BTU/Hr)	30000.00	30000.00
Peak Cooling Load (BTU/Hr)	42801.71	24307.22
Heating Thermostat Setting	68.00	68.00
Cooling Thermostat Setting	78.00	78.00
Heating Design Temperature	18.00	18.00
Cooling Design Temperature	92.00	92.00
Tolerance	0.00	0.00
Annual Heating Architectural Load (MMBTU)	42.60	19.42
Annual Cooling Architectural Load (MMBTU)	25.22	15.61

Job SIR is above
the 1.0 Threshold

Energy Saving Measures

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Distribution 1	---	8	Distribution Measures	14.97	299.47	834.75		12.65	20
Distribution 1	---	---	(AM) Register Replacement			60.00			
Appliance 1	---	---	(ES) LED - 75w equivalent	2.54	60.92	202.20		9.70	37
Wall 2 [North]	4.2	15.25	(ES) Cellulose DP R-13	3.90	117.02	391.50	391.50	4.10	30
Wall 2 [North]	---	---	(AM) Install Chair Rail			250.00			
Wall 4 [East]	4.2	15.25	(ES) Cellulose DP R-13	1.86	55.88	195.30	195.30	3.92	30
Wall 4 [East]	---	---	(AM) Install Chair Rail			125.00			

Note all "Braided" measures are still in the locked version of the Energy Audit at full cost. Even if the measure SIR is below the 1.0 threshold.

Domestic Hot Water	---	---	(ES) LF Shower Head Install	0.12	0.85	17.16		1.45	7
Basement Floor 1	4.42	31.74	(ES) Floor Insulation R-30	4.65	93.06	1712.50	1712.50	1.36	20
Domestic Hot Water	---	---	(ES) LF Aerator Install	0.11	0.76	17.26		1.28	7
Domestic Hot Water	---	---	(ES) DWH Tank-Wrap	0.48	7.19	150.00		1.28	15
Heating Cooling 2	---	---	(ES) HP (HSPF 9.0, SEER 16, 30K/30K)	6.46	96.97	5000.00		0.52	15
Infiltration	---	---	Total Air infiltration	0.88	8.75	560.45	560.45	0.44	10
Attic 1	30.69	51.69	(ES) FG LF R-21	0.64	19.11	1112.50	1112.50	0.30	30
Attic 1	---	---	(AM) Baffles			342.00			

Weatherization

Energy Saving Report

Funding Source:

Report Date: 01/11/2023

Client Name: Co
Funding Example

Client Address: Main RICHMOND VA 22222

Job Number: 2097066131

Location: Richmond, VA

Job SIR:3.1543

Job Cost: \$8273.83

Job Lifetime:23.46 Years

Annual Savings of 33.87 mmbtu

Lifetime Savings of 794.39
mmbtu

Total Fuel Cost
\$1540.00

Pre Heating Degree Days 3509.38

Post Heating Degree Days
3509.38

Pre Cooling Degree Days
2010.00

Post Cooling Degree Days
2010.00

System Design Capacity

Item	Pre	Post
Heating	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cooling	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Peak Heating Load (BTU/Hr)	52973.85	26002.35
Heating Output (BTU/Hr)	30000.00	30000.00
Cooling Output (BTU/Hr)	30000.00	30000.00
Peak Cooling Load (BTU/Hr)	42610.35	26066.21
Heating Thermostat Setting	68.00	68.00
Cooling Thermostat Setting	78.00	78.00
Heating Design Temperature	18.00	18.00
Cooling Design Temperature	92.00	92.00
Tolerance	0.00	0.00
Annual Heating Architectural Load (MMBTU)	39.87	19.56
Annual Cooling Architectural Load (MMBTU)	24.99	15.75

Job SIR is above
the 1.0 Threshold

Energy Saving Measures

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Distribution 1	---	8	Distribution Measures	13.67	273.49	834.75		12.85	20
Distribution 1	---	---	(AM) Register Replacement			60.00			
Appliance 1	---	---	(ES) LED - 75w equivalent	2.54	60.92	202.20		9.70	37

Note the two measures that were below the 1.0 threshold now have an SIR of 1.0. Must appear last or at the bottom the measure list. (All your doing here is determining the most DOE is willing to cover)

Air sealing may remain below the 1.0 threshold. (Sole Exception)

Domestic Hot Water	---	---	(ES) DWH Tank-Wrap	0.48	7.19	150.00		1.28	15
Attic 1	23.29	44.29	(ES) FG LF R-21	1.63	48.84	887.50	887.50	1.00	30
Attic 1	---	---	(AM) Baffles			210.00			
Basement Floor 1	8.42	36.47	(ES) Floor Insulation R-30	2.41	48.23	1212.50	1212.50	1.00	20
Infiltration	---	---	Total Air infiltration	1.46	14.62	560.45	560.45	0.74	10

Weatherization

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
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Energy Saving Report

Funding Source:

Report Date: 01/11/2023

Client Name: Co
Funding Example

Client Address: Main RICHMOND VA 22222

Job Number: 2097066131

Location: Richmond, VA

Job SIR:2.7691

Job Cost: \$9130.83

Job Lifetime:23.46 Years

Annual Savings of 33.87 mmbtu

Lifetime Savings of 794.39
mmbtu

Total Fuel Cost
\$1540.00

Pre Heating Degree Days 3509.38

Post Heating Degree Days
3509.38

Pre Cooling Degree Days
2010.00

Post Cooling Degree Days
2010.00

System Design Capacity

Item	Pre	Post
Heating	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cooling	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Peak Heating Load (BTU/Hr)	52973.85	26002.35
Heating Output (BTU/Hr)	30000.00	30000.00
Cooling Output (BTU/Hr)	30000.00	30000.00
Peak Cooling Load (BTU/Hr)	42610.35	26066.21
Heating Thermostat Setting	68.00	68.00
Cooling Thermostat Setting	78.00	78.00
Heating Design Temperature	18.00	18.00
Cooling Design Temperature	92.00	92.00
Tolerance	0.00	0.00
Annual Heating Architectural Load (MMBTU)	39.87	19.56
Annual Cooling Architectural Load (MMBTU)	24.99	15.75

Job SIR is above
the 1.0 Threshold

Energy Saving Measures

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
Distribution 1	---	8	Distribution Measures	13.67	273.49	834.75		12.85	20
Distribution 1	---	---	(AM) Register Replacement			60.00			
Appliance 1	---	---	(ES) LED - 75w equivalent	2.54	60.92	202.20		9.70	37
Wall 2 [North]	4.2	15.25	(ES) Cellulose DP R-13	4.30	128.99	391.50	391.50	4.52	30
Wall 2 [North]	---	---	(AM) Install Chair Rail			250.00			
Wall 4 [East]	4.2	15.25	(ES) Cellulose DP R-13	2.04	61.08	195.30	195.30	4.29	30
Wall 4 [East]	---	---	(AM) Install Chair Rail			125.00			
Wall 3 [West]	4.2	15.25	(ES) Cellulose DP R-13	2.03	60.83	195.30	195.30	4.27	30

Note all measures include the full cost. The three circled below recieved SIRs of less than 1.0. These measures qualify for Co-funding because the job SIR is above the 1.0 Threshold.

Domestic Hot Water	---	---	(ES) DWH Tank-Wrap	0.48	7.19	150.00		1.28	15
Attic 1	23.29	44.29	(ES) FG LF R-21	1.63	48.84	1112.50	1112.50	0.75	30
Attic 1	---	---	(AM) Baffles			342.00			
Infiltration	---	---	Total Air infiltration	1.46	14.62	560.45	560.45	0.74	10
Basement Floor 1	8.42	36.47	(ES) Floor Insulation R-30	2.41	48.23	1712.50	1712.50	0.71	20

Weatherization

Section	Pre-R	Post R	Measure	Savings (mmbtu/year)	Savings (mmbtu/lifetime)	Net Cost	Adjusted Cost	SIR	Life Year
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