



## 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 DOEs 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



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AND COMMUNITY DEVELOPMENT  
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# BRAIDED FUNDS

Energy Modeling (HEAT)





## Starting the Energy Audit



"Client Job List" Screen now available for auditors.

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Open Job Save Copy Application Cancel Help

**HEAT Enterprise**

**Edit Client - Braiding Example**

**Open Job** **Save** **Copy Application** **Cancel** **Help**

**HOME** **LEAD MANAGEMENT** **CLIENT MANAGEMENT** **JOB MANAGEMENT** **WORKFLOW** **VENDOR/CREW** **INVOICING** **REPORTING** **GENERAL INFORMATION**

**Client Information - DHCD** Client History for 472669392 (DHCD)

**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**

**Client Contact Method** **Contact Date** **Follow Up Date** **Comment** **Add New** **Delete**

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**

**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

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

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**HEAT Enterprise**

**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:   
 Need Appoint.    Deferred

**Tier**

**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   Knob&Tube:   
# of Woodstoves: 0   Asbestos (Old):   
# of Fireplaces: 0   Lead Paint:   
# of Unvented Heaters: 0   Moisture Problems:   
# of Bedrooms: 3   VOC:   
Year Built\*: 2000   Built before 1979:

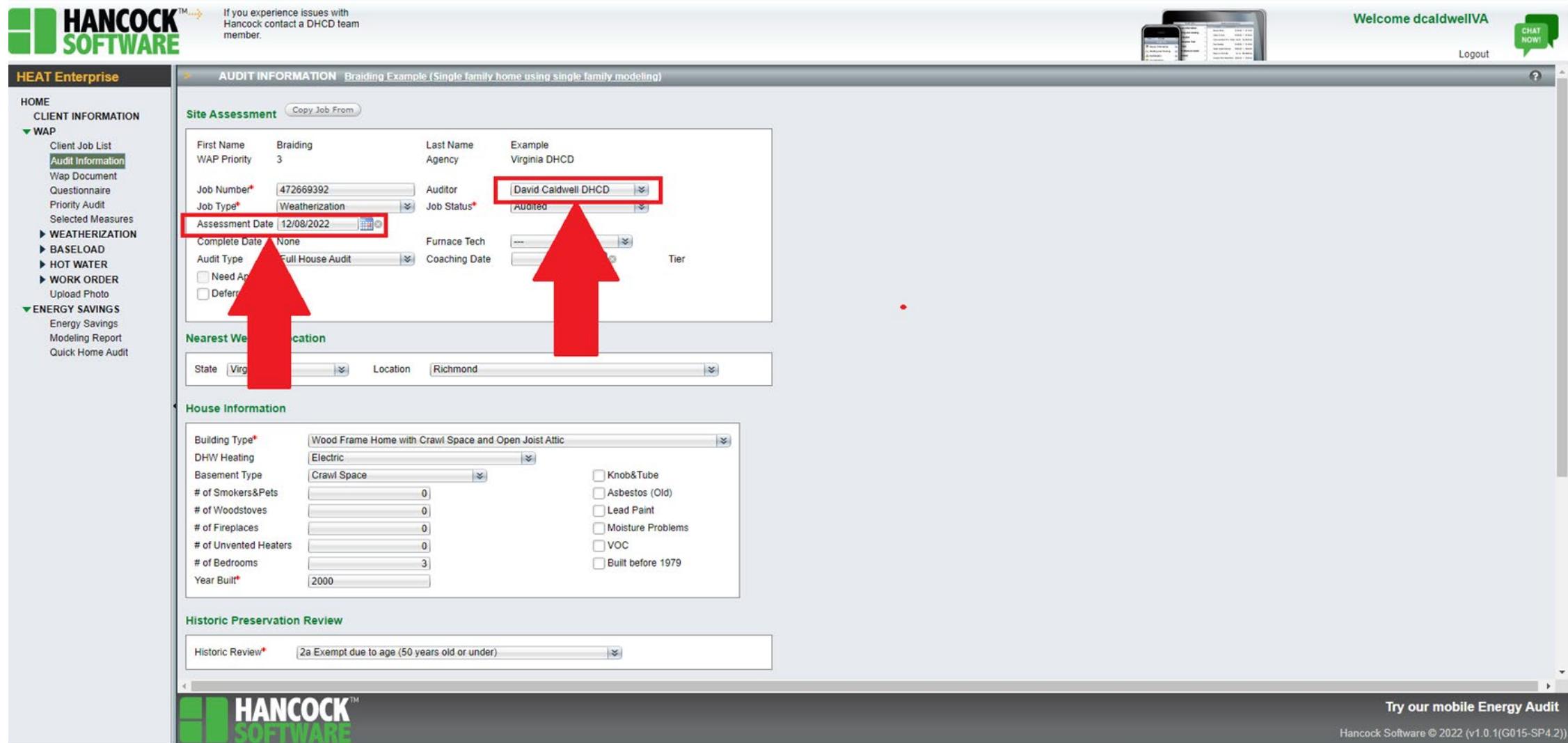
**Historic Preservation Review**

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	Furnace Tech	
Complete Date	None	Coaching Date	
Audit Type	Full House Audit	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
# 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 all applicable measure have been selected, select the “Leveraged” funding source. Measure must be modeled at full cost!

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**HEAT Enterprise**

**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.		we 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			
	(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:

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.

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## HEAT Enterprise

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

Job SIR: 1.8551

The difference between Modeled Pre-MMBTU "31.73" & Actual Reported Pre-MMBTU "21.46" is greater than 20% (System "Heating" and Fuel Type "Electric")

The difference between Modeled Pre-MMBTU "19" & Actual Reported Pre-MMBTU "3.74" is greater than 20% (System "Cooling" and Fuel Type "Electric")

The difference between Modeled Pre-MMBTU "5.88" & Actual Reported Pre-MMBTU "8.86" is greater than 20% (System "Hot Water" and Fuel Type "Electric")

Recalculate Use Estimated costs Funding Source: --- Location: Richmond, VA

Job SIR: 1.8551 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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# Take note of the individual measure SIRs. Additional information on the following page.



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**HEAT Enterprise**

**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	391.50	9.70	37
Distribution 1	---	8.00	Distribution Measures	14.97	299.47	834.75	391.50	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	391.50	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 DOEs SIR requirements or that is not permitted by DOE WAP.

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**HEAT Enterprise**

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 12x12x1 filter grill in the fan. Install 12x12x1 filter grill in the hallway and then exhaust fan out the gable end of the home with 6'8 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:  Set

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.

**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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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)	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

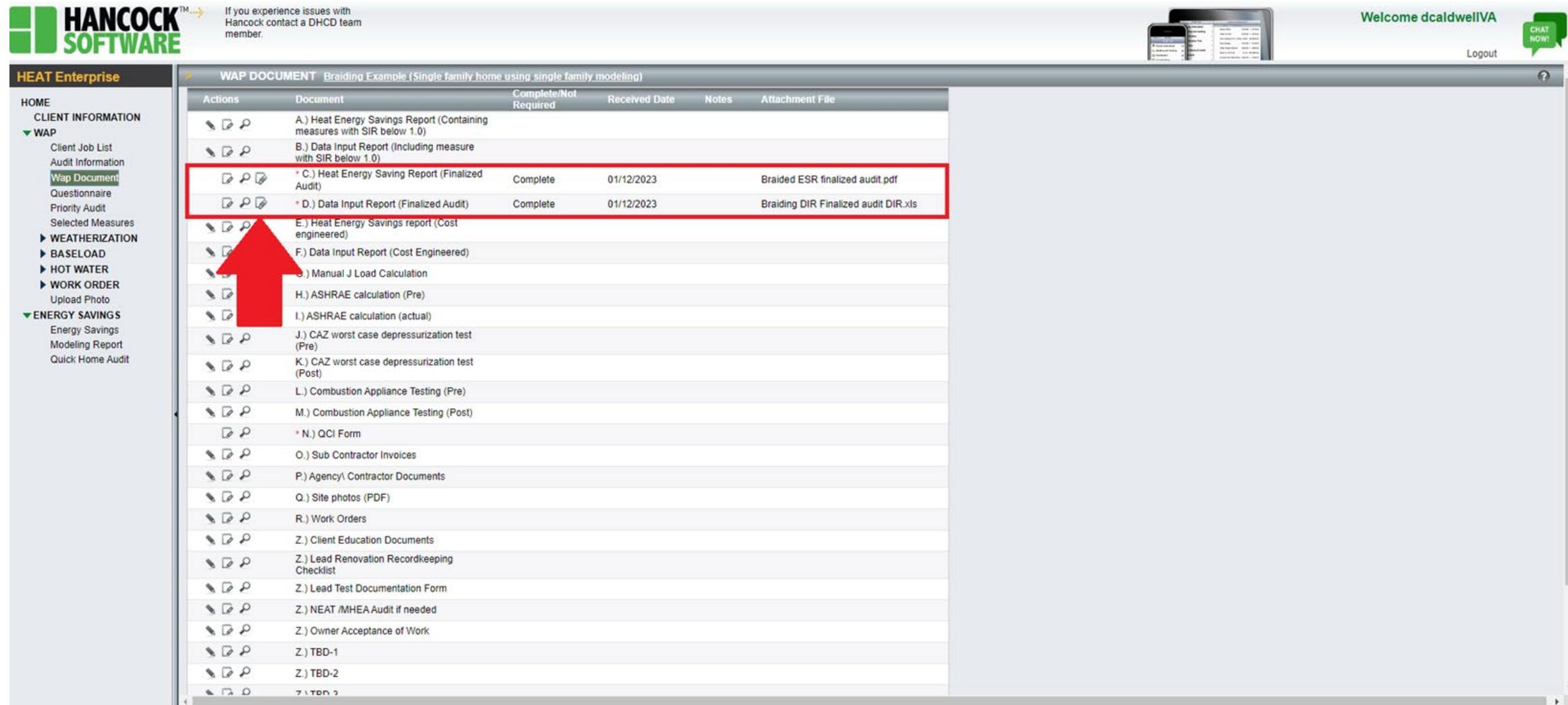
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# Save copies of the finalized Energy Savings Report and Data Input Report within the WAP document screen.



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

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**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 2				



## 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)



# Starting the Energy Audit



"Client Job List" Screen now available for auditors.

Welcome dcaldwellVA



Logout

HEAT Enterprise

HOME

LEAD MANAGEMENT

**CLIENT MANAGEMENT**

JOB MANAGEMENT

Client Status Report

Job Process 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

Agency

Edit Client - Braiding Example

Client Information - DHCD

Client History for 472669392 (DHCD)

Open Job

Save

Copy Application

Cancel

Help

WAP

+ Contact

- Application

Agency

Virginia DHCD

Client Status

Qualified

Allocation

WAP

Expiration Date

1/24/2024

Date of Last Weatherization

Client Number

472669392

Wap Rank

5

Primary Heating\*

Electric

Inactive

David Caldwell DHCD

Building Type\*

Owner-Occupied Single Family Site Built

Inactive Date

Inactive Reason

Deferred

Deferred Date

Client Denied Reason

Applied Date\*

1/24/2023

Certified Date\*

1/24/2023

Reweather. Date

Client Tag

Agency Tag

Add New

Delete



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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Logout

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 Urgent		Tier
<input type="checkbox"/> Need Approval			
<input type="checkbox"/> Deferred			

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

**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

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

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**HEAT Enterprise**

**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
Audit Type	Full House Audit	Furnace Tech	
<input type="checkbox"/> Need A		<input type="checkbox"/> Coaching Date	Tier
<input type="checkbox"/> Def			

**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

**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!**



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



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Logout

**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="text"/>
<input type="checkbox"/> Need Approval <input type="checkbox"/> Deferred		Tier	

**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	
# of Smokers&Pets	<input type="text"/> 0	<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
# of Woodstoves	<input type="text"/> 0	
# of Fireplaces	<input type="text"/> 0	
# of Unvented Heaters	<input type="text"/> 0	
# of Bedrooms	<input type="text"/> 3	
Year Built*	<input type="text"/> 2000	

**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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Logout

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## HEAT Enterprise

### 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			
	(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:

This value has been amended.

This job has exceeded the state maximum quantity or cost

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# Run the Energy Savings Report and take note of the measures falling below the 1.0 SIR threshold

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

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Logout

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## HEAT Enterprise

### 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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# Save copies of the Data Input Report and Energy Savings Report under WAP Documents.

The screenshot shows the Hancock Software HEAT Enterprise interface. On the left, a sidebar menu is visible with sections for HOME, CLIENT INFORMATION, WAP (Client Job List, Audit Information, Wap Document, Questionsnaire, Priorities, Measures, WEATHERIZATION, Cooling, Heating, 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), and ENERGY SAVINGS (Energy Savings, Modeling Report, Quick Home Audit). The 'Wap Document' item under WAP is highlighted with a red box and a red arrow pointing to it. The main content area displays a table titled 'WAP DOCUMENT Co Funding Example (Single family home using single family modeling)'. The table has columns for Actions, Document, Complete/Not Required, Received Date, Notes, and Attachment File. The 'Wap Document' row is also highlighted with a red box and a red arrow pointing to it. The table lists various documents including A.) Heat Energy Savings Report, B.) Data Input Report, and C.) Heat Energy Saving Report (Finalized Audit). The 'Attachment File' column for the Wap Document row shows 'Co-Funded ESR containing measures with a 1.0 SIR or less.pdf' and 'Co-Funded DIR containing measures with a 1.0 SIR or less.xls'. The bottom of the interface features the Hancock Software logo and a message to try the mobile energy audit.

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)				
	* D.) Data Input Report (Finalized Audit)				
	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				



## 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.**



# Adjust the cost of the measures below the 1.0 SIR threshold from the selected measures screen. (Looking for the max 1.0 SIR cost)

**HEAT Enterprise**

**Selected Measures**

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) DWH Insulate H/C 6'	Hot Water	1	EA	8.98	11.73	8.98	11.73	20.71	Leveraged	J&J Weatherization, Inc.		
	(ES) DWH Tank-Wrap	Water Heater	1	Ea	75	75	75.00	75.00	150.00	Leveraged	J&J Weatherization, Inc.		Use straps in accordance with the SWS
	(ES) FG LF R-21	Attic 1	1,250	SF	0.31	0.4	387.50	500.00	887.50	Leveraged	J&J Weatherization, Inc.		Add an additional R-21 or blown FG in the attic.
	(ES) Floor Insulation R-30	Basement Floor 1	1,250	SF	0.7	0.27	875.00	337.50	1,212.50	Leveraged	J&J Weatherization, Inc.		
	(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	11.04	Leveraged	J&J Weatherization, Inc.		

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  
[Print Report](#)

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

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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) 24.99 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	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			

4

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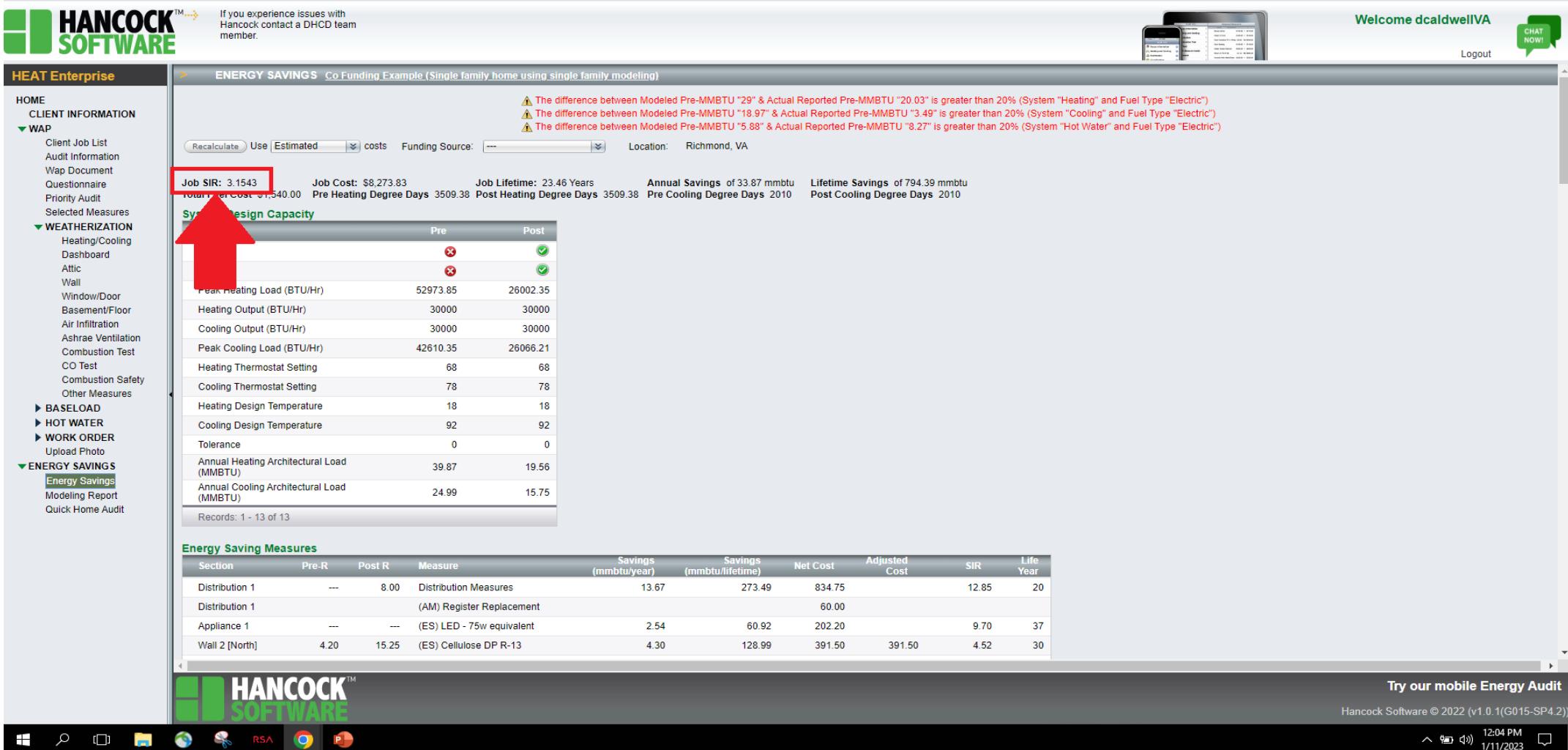
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## Reminder

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.

# The job SIR must remain a 1.0 or greater



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

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

Job SIR: 3.1543

Job Cost: \$8,273.83

Job Lifetime: 23.46 Years

Annual Savings of 33.87 mmbtu

Lifetime Savings of 794.39 mmbtu

Yearly Cost \$1,540.00

Pre Heating Degree Days 3509.38

Post Heating Degree Days 3509.38

Pre Cooling Degree Days 2010

Post Cooling Degree Days 2010

**System Design Capacity**

	Pre	Post
Peak Heating Load (BTU/Hr)	52973.85	26002.35
Heating Output (BTU/Hr)	30000	30000
Cooling Output (BTU/Hr)	30000	30000
Peak Cooling Load (BTU/Hr)	42610.35	26066.21
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)	39.87	19.56
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	391.50	12.85	20
Distribution 1	---	---	(AM) Register Replacement		60.00				
Appliance 1	---	---	(ES) LED - 75w equivalent	2.54	60.92	202.20	391.50	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

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12:04 PM 1/11/2023



# Lock the energy audit

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

- 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

**HANCOCK SOFTWARE**

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

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

Welcome dcaldwellVA

Logout

CHAT NOW!

**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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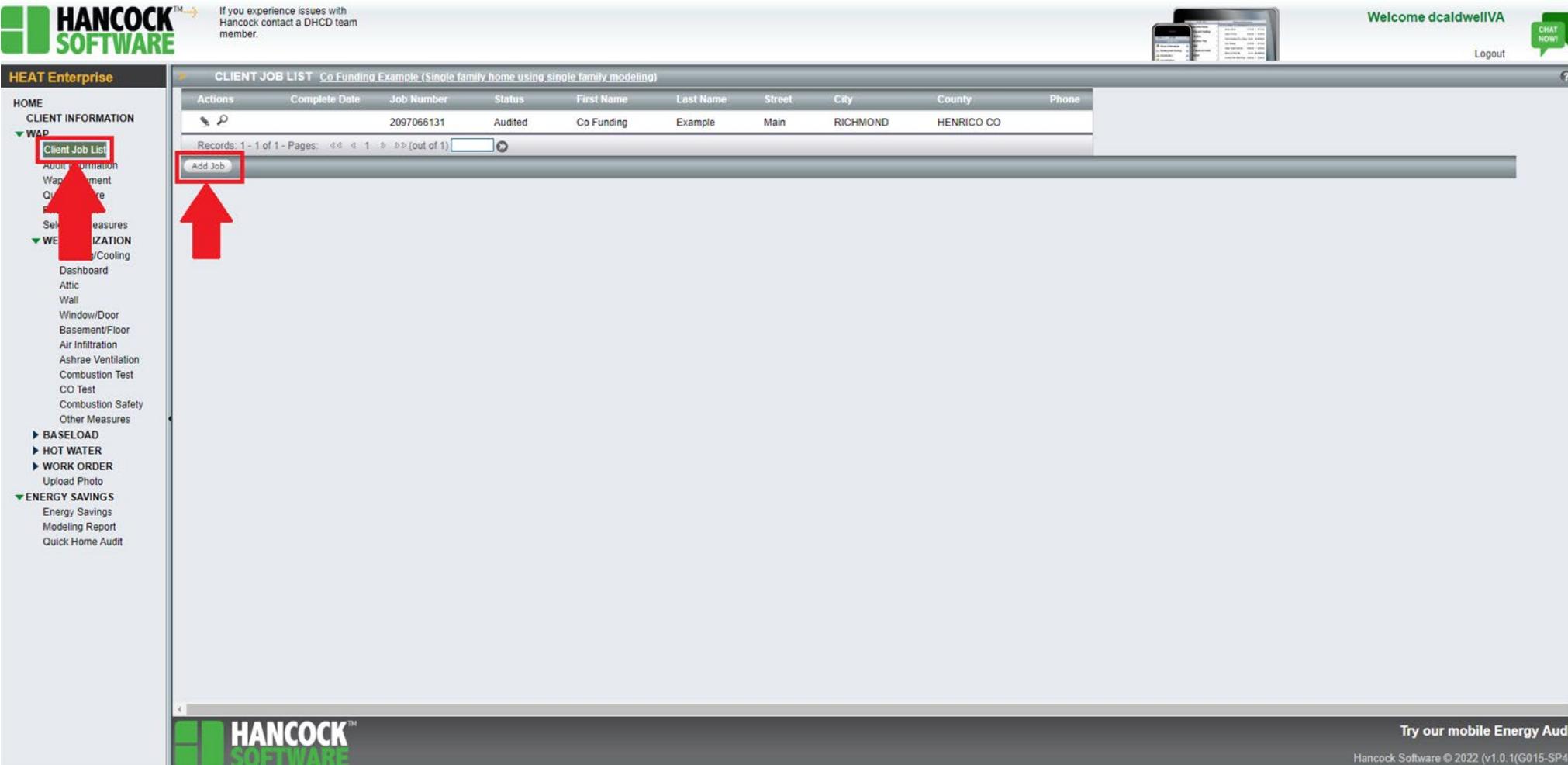


# Reminder

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



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

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CHAT NOW

**HEAT Enterprise**

**CLIENT INFORMATION**

**WAP**

**Client Job List**

Audit Information  
Wap Assessment  
QuicKore  
R  
Sel  
measures

**WE**

**IL**

**IZATION**

gCooling  
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)

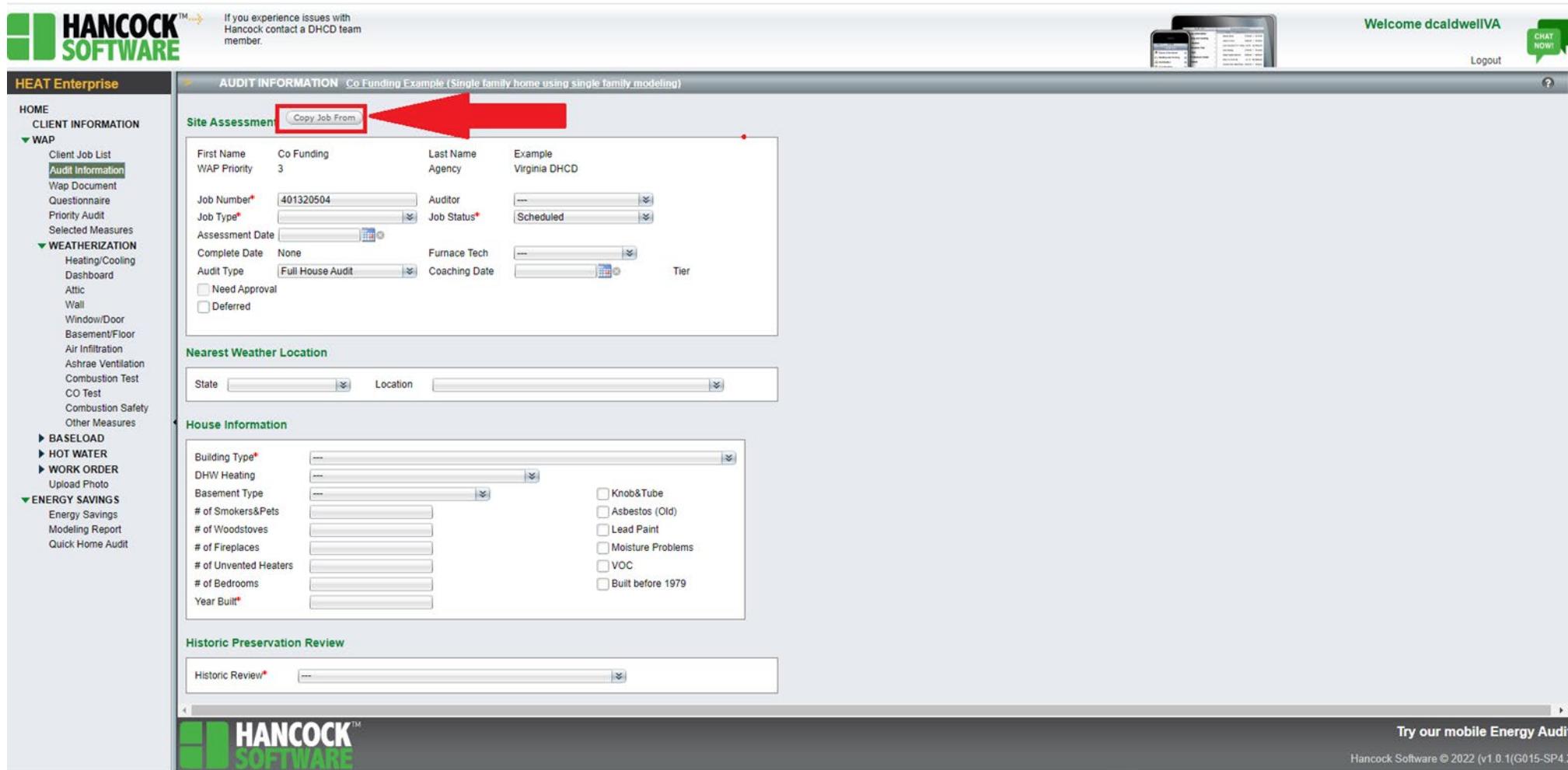
Add Job

Try our mobile Energy Audit

Hancock Software © 2022 (v1.0.1(G015-SP4.2))

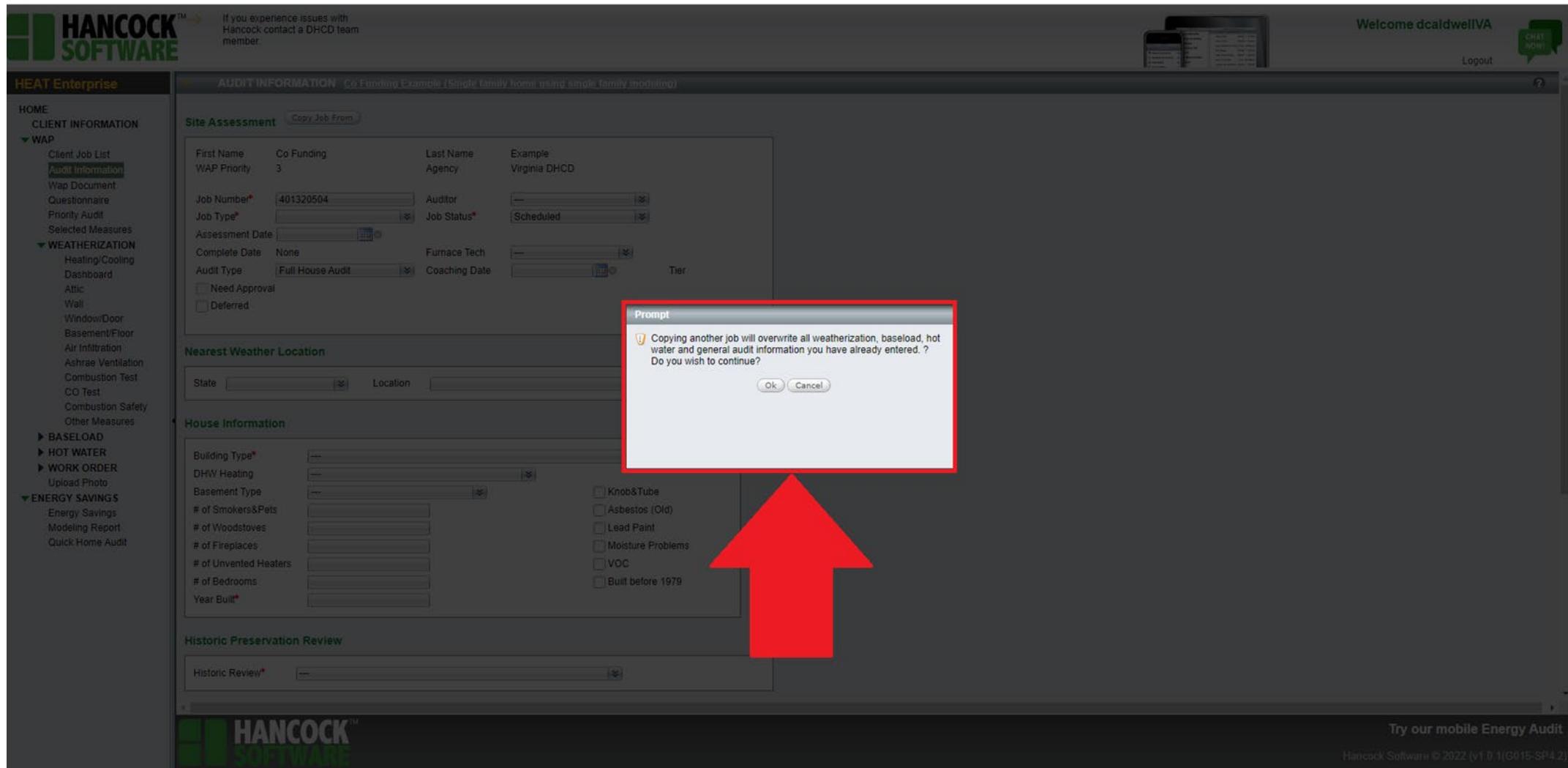


This will create a second job under the same client record. Select the “Copy Job From” button at the top of the page.



The screenshot shows the Hancock Software HEAT Enterprise interface. The main title is "AUDIT INFORMATION Co Funding Example (Single family home using single family modeling)". The left sidebar contains a navigation menu with sections like HOME, CLIENT INFORMATION, WAP, WEATHERIZATION, BASELOAD, HOT WATER, WORK ORDER, and ENERGY SAVINGS. The main form is titled "Site Assessment" and includes fields for First Name, Co Funding, Last Name, Agency, Job Number, Auditor, Job Type, Job Status, Assessment Date, Complete Date, Furnace Tech, Audit Type, Coaching Date, and Tier. Below these are sections for "Nearest Weather Location" (State and Location dropdowns) and "House Information" (Building Type, DHW Heating, Basement Type, # of Smokers/Pets, # of Woodstoves, # of Fireplaces, # of Unvented Heaters, # of Bedrooms, Year Built, and checkboxes for Knob&Tube, Asbestos (Old), Lead Paint, Moisture Problems, VOC, and Built before 1979). At the bottom is a "Historic Preservation Review" section with a dropdown for "Historic Review". The bottom right of the page includes a "Try our mobile Energy Audit" link and the text "Hancock Software © 2022 (v1.0.1(G015-SP4.2))". The top right features a "Welcome" message for "dcaldwellVA", a "Logout" link, and a "CHAT NOW!" button.

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





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

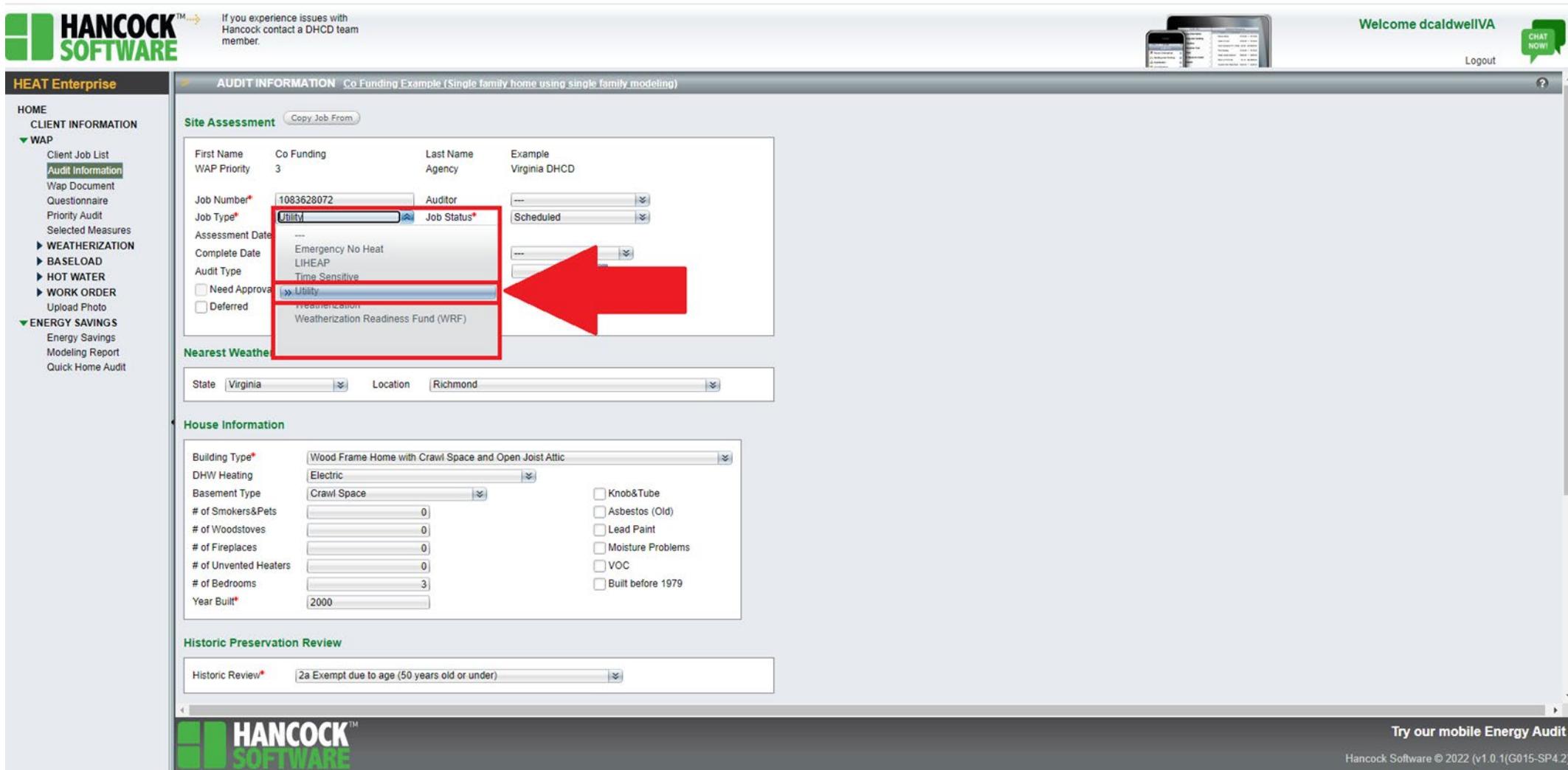
Contains Contains Contains Contains Contains Contains

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


Cancel Ok

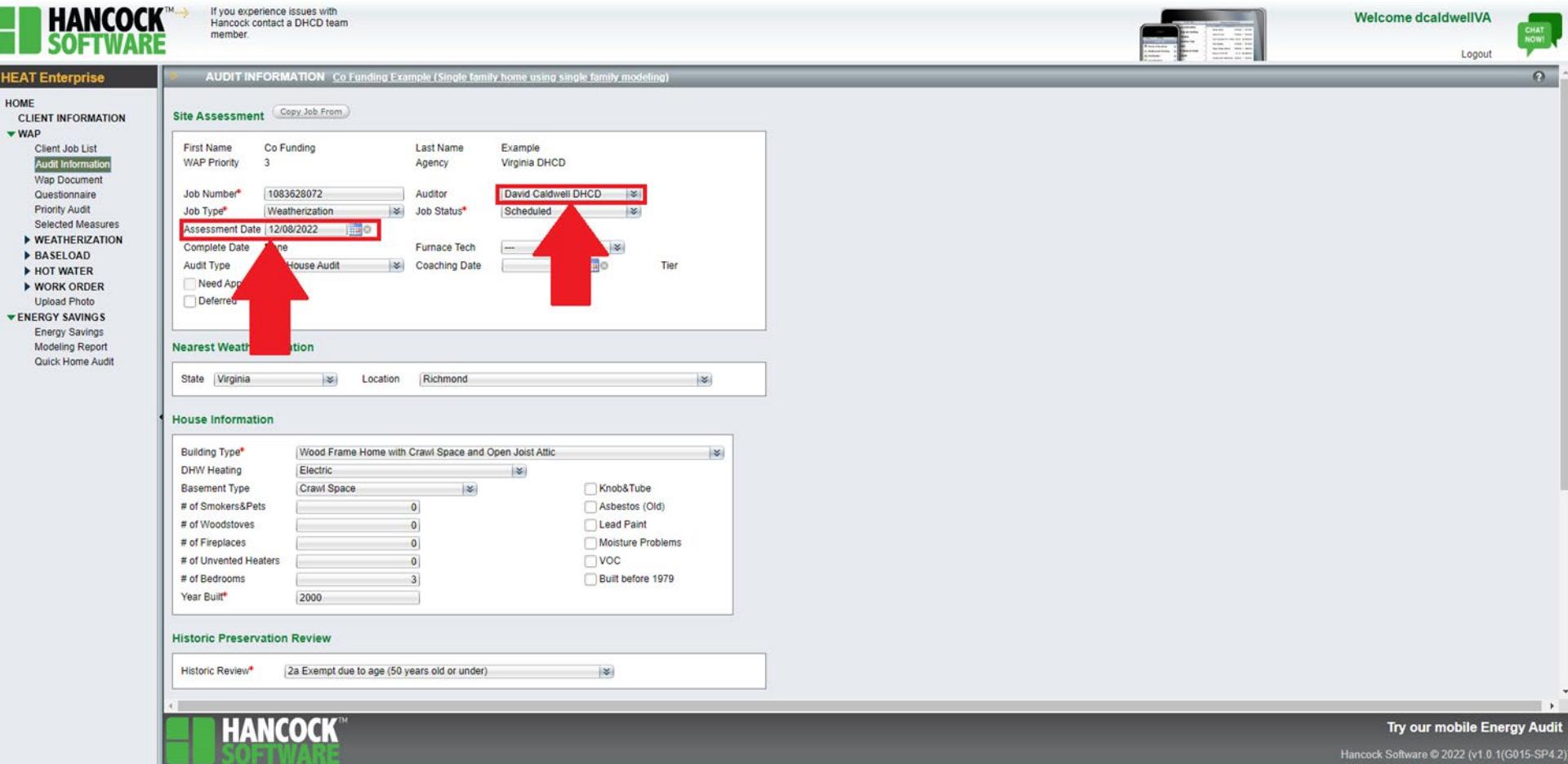
# Select the appropriate item from the Job Type dropdown box.



The screenshot shows the HEAT Enterprise software interface. The left sidebar includes sections for HOME, CLIENT INFORMATION (WAP, Audit Information, Wap Document, Questionnaire, Priority Audit, Selected Measures), WEATHERIZATION, BASELOAD, HOT WATER, WORK ORDER (Upload Photo), and ENERGY SAVINGS (Energy Savings, Modeling Report, Quick Home Audit). The main content area is titled 'AUDIT INFORMATION Co Funding Example (Single family home using single family modeling)'. It contains sections for Site Assessment (Job Number: 1083628072, Auditor: Example, Agency: Virginia DHCD, Job Type: Utility, Job Status: Scheduled), 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, checkboxes for Knob&Tube, Asbestos (Old), Lead Paint, Moisture Problems, VOC, and Built before 1979), and Historic Preservation Review (Historic Review: 2a Exempt due to age (50 years old or under)). A red arrow points to the 'Job Type' dropdown menu, which is open and shows 'Utility' as the selected option. Other options in the list are Emergency No Heat, LIHEAP, Time Sensitive, Weatherization, and Weatherization Readiness Fund (WRF). The bottom of the screen features the Hancock Software logo and a 'Try our mobile Energy Audit' button.



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



**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
Audit Type	House Audit	Furnace Tech	None
<input type="checkbox"/> Need App.		<input type="checkbox"/> Coaching Date	None
<input type="checkbox"/> Deferred		<input type="checkbox"/> Tier	None

**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

**Historic Preservation Review**

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

**HANCOCK SOFTWARE**

Welcome dcaldwellVA [Logout](#)

CHAT NOW!

Try our mobile Energy Audit

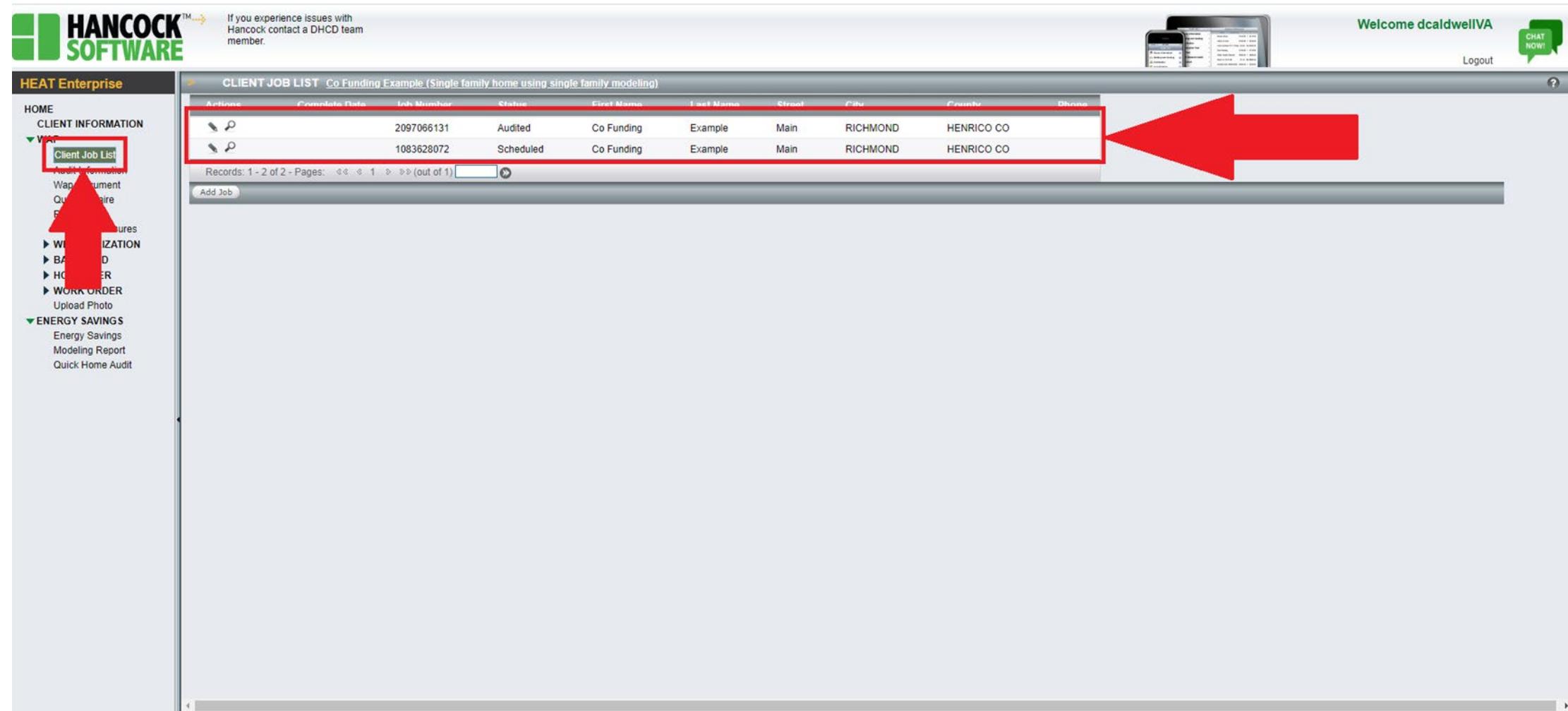
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For simplicity sub grantees may choose the “Priority Audit” type from the audit type dropdown. Fill out the rest of the audit information screen and save!

The screenshot shows the 'AUDIT INFORMATION' screen for a 'Co Funding Example' job. The 'Site Assessment' section is visible, including fields for First Name (Co Funding), Last Name (Example), Agency (Virginia DHCD), Job Number (1083628072), Job Type (Utility), Assessment Date (12/08/2022), Complete Date (None), Auditor (David Caldwell DHCD), Job Status (Scheduled), Furnace Tech (---), Coaching Date (---), and Tier (---). The 'Audit Type' dropdown is open, showing 'Priority Audit / Other' as the selected option. The 'WAP Priority' field is also highlighted with a red box. The 'Nearest Weather' section shows State (Virginia) and City (Richmond). The 'House Information' section includes fields for Building Type (Wood Frame Home with Crawl Space and Open Joist Attic), DHW Heating (Electric), Basement Type (Crawl Space), and various checkboxes for hazards like Knob&Tube, Asbestos (Old), Lead Paint, Moisture Problems, VOC, and Built before 1979. The 'Year Built' field shows 2000. The 'Historic Preservation Review' section shows a dropdown menu with the option '2a Exempt due to age (50 years old or under)'. The bottom of the screen features the Hancock Software logo and a link to 'Try our mobile Energy Audit'.

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



The screenshot shows the Hancock Software Client Job List screen. On the left, a sidebar menu is visible with various options like Home, Client Information, VAP, Work Order, and Energy Savings. The 'Client Job List' option is highlighted with a red box and an upward-pointing red arrow. The main area displays a table titled 'CLIENT JOB LIST Co Funding Example (Single family home using single family modeling)'. The table has columns for Actions, Complete Date, Job Number, Status, First Name, Last Name, Street, City, County, and Owner. Two rows of data are shown, both for 'Co Funding Example' in 'RICHMOND, HENRICO CO'. A red box highlights the second row. A large red arrow points from the 'Client Job List' menu option to the highlighted row in the table. The top right of the screen shows a welcome message 'Welcome dcaldwellVA', a 'Logout' link, and a 'CHAT NOW!' button.

Actions	Complete Date	Job Number	Status	First Name	Last Name	Street	City	County	Owner
 		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

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

Welcome dcaldwellVA

Logout

CHAT NOW!

## HEAT Enterprise

### 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 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		
				(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:  Set

1: This value has been amended

Print Report

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)

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

Welcome dcaldwellVA [Logout](#)

CHAT NOW!

**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)

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

Welcome dcaldwellVA

Logout

CHAT NOW

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	834.75	12.85	20
Distribution 1	---	---	(AM) Register Replacement		60.00				
Appliance 1	---	---	(ES) LED - 75w equivalent	2.54	60.92	202.20	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	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	17.16	1.45	7
Domestic Hot Water	---	---	(ES) DWH Tank-Wrap	0.48	7.19	150.00	150.00	1.28	15
Domestic Hot Water	---	---	(ES) LF Aerator Install	0.11	0.76	17.26	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	834.75	12.85	20
Distribution 1	---	---	(AM) Register Replacement		60.00				

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

- (ES) FG LF R-21  $\$1112.50 - \$887.50 = \$225$
- (AM) Baffles  $\$342.00 - \$210.00 = \$132$
- (ES) Floor Insulation R-30  $\$1712.50 - \$1212.50 = \$500$



# *Weatherization Works*



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

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

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

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 insulation.
	(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- the attic.
	(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

1: This value has been amended

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

HANCOCK™ SOFTWARE

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VIRGINIA DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT  
Partners for Better Communities

43



## 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 you're 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

## 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 received 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