

WAMS Instruction Manual

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INTRODUCTION

The WAMS program was designed to provide local agencies and state staff with detailed information on the Weatherization Program. This manual contains specific descriptions of the workings of the WAMS program.

Keep in mind that every agency has different paperwork and methods, so there is not anyway to describe where to find the information needed to complete WAMS. If an agency utilizes the Standardized Evaluation Form, WAMS data entry will be easier to complete.

WAMS OVERVIEW

This section is designed to provide an overview of the Weatherization Automated Management System (WAMS). It provides a brief description of the various sections included in this computerized program.

The MAIN SWITCHBOARD serves as the menu for WAMS. It includes the following options:

MAIN SWITCHBOARD

1. *Client Data*
2. *House Data*
3. *Reports/Letters*
4. *Other Information*
5. *Demographics Tables*
6. *System Utilities*

Each of these includes several sub-menu items which can be accessed by clicking on the box beside the switchboard item.

1. Client Data Button
 - **Client Data Tab**
Contains client name and household demographic information including WX file number, AFN, family type, ethnic background, income source, poverty level, income, etc. It also includes a field for agency identification number.
 - **LHEAP Information Tab**
Provides information about clients' participation in the LHEAP program including status, approval date, ECIP participation and LHEAP denial reason.
 - **Notes Tab**
Memo field for additional information about client
2. House Data Button
 - **House Data Tab**
Provides information about the house including address, landlord information, square footage, house type, housing status, heating source, fuel vendors, etc.
 - **MatTemp Tab**
Agency records material and labor costs for measures installed on house in pre-programmed records – used by flat rate or non-flat rate contractors and crews
 - **Tech Info Tab**
Agency records results of blower door tests, attic and garage by-pass leakage tests, and CO readings for various combustion appliances
 - **After WX Tab**
Agency records names of crews/contractors working on house, name of evaluator and inspector, date of evaluation and completion and whether the house is re-weatherized
 - **MatFinal Tab**
Final information about materials/measures installed in the house – this shows only the material records selected for a specific house rather than the whole list of materials
 - **Cost Final Tab**
Summarizes the costs charged to a house by measure (infiltration, insulation, repair, etc.)

- **Heating Data Tab**
Allows agency to enter heating data either by month or year
- **Electric Data Tab**
Allows agency to enter electric usage data either by month or year
- **Notes Tab**
Agency can record notes/comments about a client or house

This section also includes several different buttons for moving around within the computer program and producing required reports. These buttons are found along the bottom of the screen.

- **Verify Data Button**
Runs a data check for a select few errors
- **House Data Button**
Produces the house data report
- **Mat List Button**
Produces the material/labor list by program, by measure
- **Mat Detail Button**
Produces a material/labor list in sequence number order
- **Interview Button**
Opens the interview screen for the current record
- **Landlord Button**
Opens the landlord database so agencies can identify a landlord for the current record
- **Client Button**
Opens the client data screens for the current record
- **Activate Button**
Activates the Mat Temp for the current record
- **Run MS Word Button**
Opens Microsoft Word program
- **Close Button**
Closes the House Data Screens – exits to the Main Switchboard

3. Reports/Letters Button

- **Client Reports**
 - Client Letters by Range
Agency can print client letters based on a priority range
 - Client Letters Marked by X
Agency can print client letters for specifically marked clients
 - Client Priority Lists
Agency can print prioritized list of clients by county
 - Client by Vendor
Agency can print client list by either secondary or primary fuel vendor
- **Completions and Work-In-Process Reports**
Agency can produce a variety of reports for both completions and work in process

- **Financial Reports**
 - Purchase Order
Prints the monthly GAX (voucher)
 - Demographics Report
Prints the monthly demographic reports (103N, 103H)
 - Detail Reports
Prints the monthly detailed reports (expenses by house) (102N, 102H, 102U)
 - Summary Reports
Prints the monthly summary reports (101, 101H, 101U)
 - Utility Reports
Prints the utility reports used by the state for reporting to funding sources
 - Print Saved Reports
Prints summary reports from previous months

- **Labels**
 - Client Labels
Produces labels which include client name, address, phone number and file number
 - Landlord Labels
Produces labels which include landlord name and address
 - Vendor Labels
Produces labels which include vendor name, contact person and address

- **Interviews Marked by X**
Produces all interviews marked for printing

- **Landlord Letters by Range**
Produces landlord letters and landlord agreements for all clients within a specific range

- **Landlord Letters Marked by X**
Produces landlord letters for all clients marked for printing

- 4. Other Information Button
 - **Interviews**
Allows for data entry of some of the basic questions asked of a client before scheduling an evaluation

 - **Landlord Information**
Agencies enter their own information for landlords including name and address

 - **Vendor Information**
Database includes UVC number for all vendors statewide

- 5. Demographics Tables
Each of these tables has pre-programmed values and will not be changed by the agencies

- 6. System Utilities
 - **Agency Data**
Contains preset agency information including agency name, agency address, agency vendor number, WX Coordinator and Executive Director. Agencies may change the information as needed.

 - **Delete Old Unchecked MatTemp Records**
Deletes un-used materials records and helps maintain the database.

- ***Import Data/Export/Archive Data***
Imports data from the LHEAP Program, creates export file for monthly reports, creates archive files
- ***Update All Client Priority Values***
Calculates client priority based on fuel usage
- ***Update BART Data Table***
Links WAMS with BART to automatically complete costs for MatTemp
- ***Zip Codes***
Links zip codes with cities. Agencies will not change this.

GETTING STARTED

To complete or check agency specific information

1. To set up or change agency data (name, address, coordinator name, etc.):

- **From:** **MAIN SWITCHBOARD**
- **Select:** **SYSTEM UTILITIES**
- **Select:** **AGENCY DATA**

All the agencies are listed here. Find your agency, check the information and make any necessary corrections. Please notify the state when you make changes so the same corrections can be made at the state level.

- **Select:** **CLOSE** – to return to **SYSTEM UTILITIES**
- **Select:** **RETURN TO MAIN SWITCHBOARD**

2. To set up agency staff, crews and contractor names: (this will help fill in some of the required information with very few keystrokes)

- Minimize the **MAIN SWITCHBOARD** by clicking on the – symbol in upper right corner
- Restore the WAMS DATABASE screen by clicking on the symbol
- **Select:** **TABLES** tab
- **Open:** **STAFF** table

Enter staff, crew and contractor names and phone numbers. You can enter as many names as are needed.

Close the table by clicking on the X symbol

After the changes have been made, minimize the WAMS DATABASE by clicking on the – symbol and restore the **MAIN SWITCHBOARD** by clicking on the symbol

3. To complete agency costs for Flat Rate and NEATSHELL users:

- Minimize the **MAIN SWITCHBOARD** by clicking on the – symbol in upper right corner
- Restore the WAMS DATABASE screen by clicking on the symbol
- **Select:** **TABLES** tab
- **Open:** **MATTEMP TEMPLATE** table

FOR FLAT RATE:

Check the column labeled HRS (this is the hourly labor flat rate – it is preset to \$20 per hour). Change it to the agency's current labor rate by highlighting the column, click on Edit, Replace, and after completing the two figures, click on Replace All.

Check the column labeled RMAT (this is the per unit materials costs). Change it to the agency's material costs.

RLAB (flat rate labor per unit) is a calculated field and will not change until you have activated a house with the new rates. Changes in flat rate will not affect any existing files and will only show on any newly activated houses.

FOR NEATSHELL:

Enter your agency's average unit costs in the columns labeled OLAB (labor) and OMAT (materials).

- After changes have been made, close the table (changes are saved automatically) and minimize the WAMS DATABASE then restore the **MAIN SWITCHBOARD**.

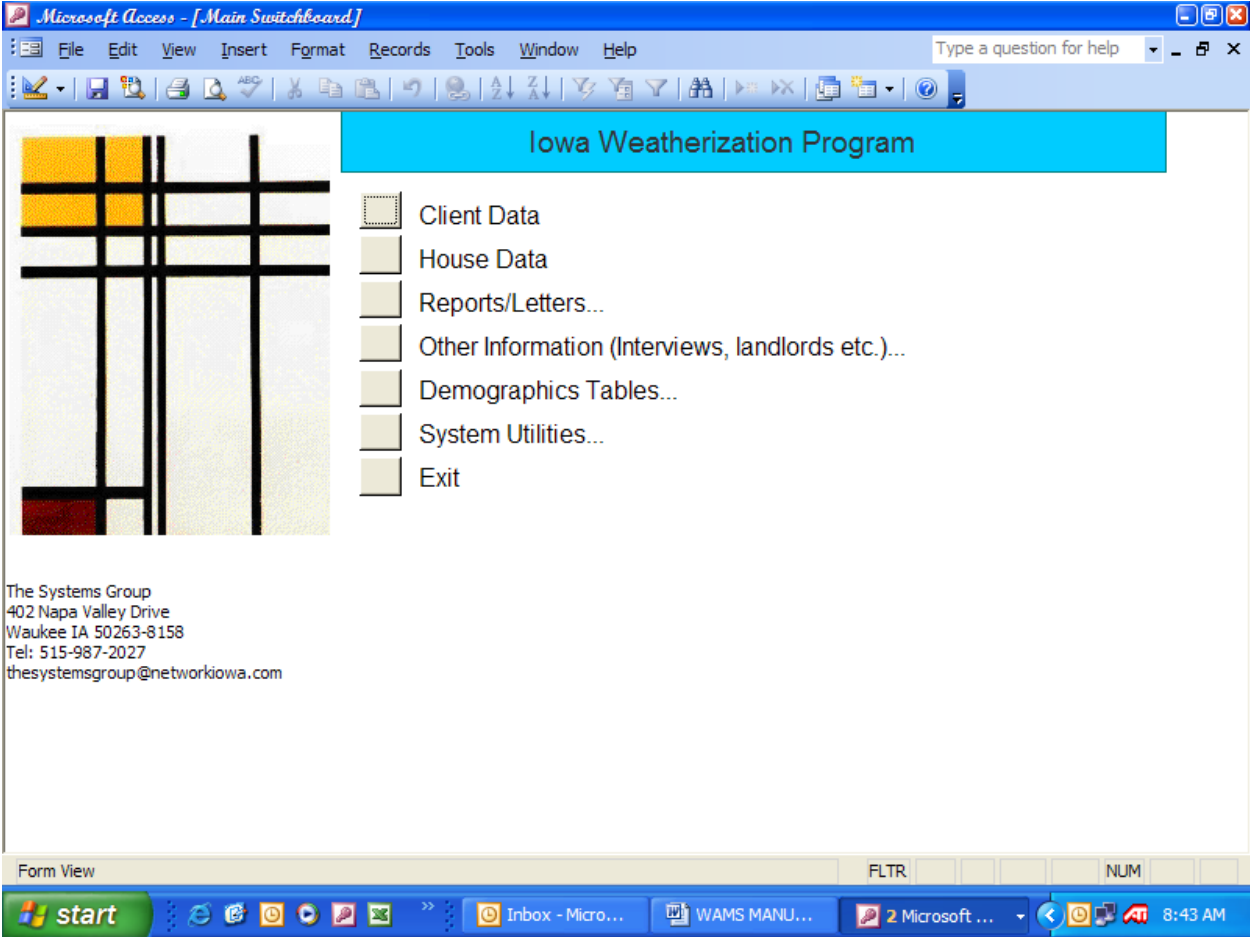
4. To fill in landlord information:

This program allows weatherization to maintain a landlord database which would include any or all landlords for your agency. This database will be accessed in order to prepare the landlord letters.

- **From:** **MAIN SWITCHBOARD**
- **Select:** **OTHER INFORMATION**
- **Select:** **LANDLORD INFORMATION**
Fill in the information for agency specific landlords.
- **Select:** **CLOSE** – to return to **OTHER INFORMATION**
- **Select:** **RETURN TO MAIN SWITCHBOARD**

MAIN SWITCHBOARD

The **MAIN SWITCHBOARD** serves as the central menu for WAMS. There are several choices listed. To access these choices, place the cursor on the button beside the section name and click once.



From: **MAIN SWITCHBOARD**

CLIENT DATA

Normally the information in this section will be imported from LHEAP data. If it is imported from LHEAP, please verify accuracy of information. If you have an application taken outside the LHEAP process, you will need to complete this information yourself.

The **CLIENT DATA** section has three tabs at the top of the screen labeled *Client Data*, *LHEAP Info* and *Notes*.

CLIENT DATA Tab

Contains client name and household demographic information

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Client : Form]". The main form is for "Joey D Smith" and has three tabs: "Client Data", "LHEAP Info", and "Notes". The "Client Data" tab is active. The form contains the following fields and values:

Name	Joey D Smith	Print Labels	
WX File Number (FIL)	01-13-0637	Print Client Letter	
Agency File Number (AFN)	13-134223	Sex	F
Social Security Number (SSN)	111-11-1111	Family Type (FAM)	C Two parents with children
Number Of:		Ethnicity (ETH)	W White
Household Members (THM)	3	Income Source (INC)	AD
Elderly (ELD)	1	Poverty Level (POV)	81
Young Children (YCH)	0	QtrlyGrossIncome(QGI)	\$3,275.00
Disabled (HCP)	1	THD Number	
American Indians (IND)	0	Salutation	
AgencyNumber	01B	Community Opportunities, Inc.	

Note: the client priority will not be calculated until the house form is edited

Buttons at the bottom: Preview Labels, Open House Form, Run MS Word, Close

Record: 1 of 220

Social Security Number NUM

FIELD TITLE

DEFINITION/DESCRIPTION

FIELD TITLE	DEFINITION/DESCRIPTION
Name	Enter the client's first name, middle initial and last name
WX File Number	This will be complete by you at the time a house is assigned a file number.
Agency File Number	Usually assigned by LHEAP – or use your agency's procedure for assigning the AFN.
Social Security #	of head of household

Household Members	Number of people in the household
Elderly	Number of elderly in household
Young Children	Number of children age 6 and younger in the household
Disabled	Number of disabled individuals in the household
American Indian	Number of American Indians in the household
Agency Number	Your specific agency number. Select from drop down if uncertain.
Print Labels	This program allows you to print labels to be used on forms, folders, etc. To use this feature, simply click in the box to mark it. Then go to the PREVIEW LABELS button at the bottom of the screen.
Print Client Letter	This can be used to merge client name and address to create a letter to clients. After marking, go back to the main switchboard and then into REPORTS/LETTERS to create the query for client letters. Letters must be produced in Word using the mail merge feature.
Sex	of head of household
Family Type	Use drop down menu to select correct code for family type
Ethnicity	of head of household. Use drop down menu to select correct code
Income Sources	Use drop down menu to select all codes that pertain to the household
Poverty Level	% of poverty
Qtrly Gross Income	Total household income for the quarter
THO Number	this is an identifying number used by the THO LHEAP software
Salutation	How you want the client letter salutation to read

LHEAP INFO Tab

This contains LHEAP specific information imported from LHEAP data. If you have an application taken outside the LHEAP process, you will need to complete the Approval Data

The screenshot shows the Microsoft Access interface for a client named "Joey D Smith". The "LHEAP Info" tab is active, displaying the following fields:

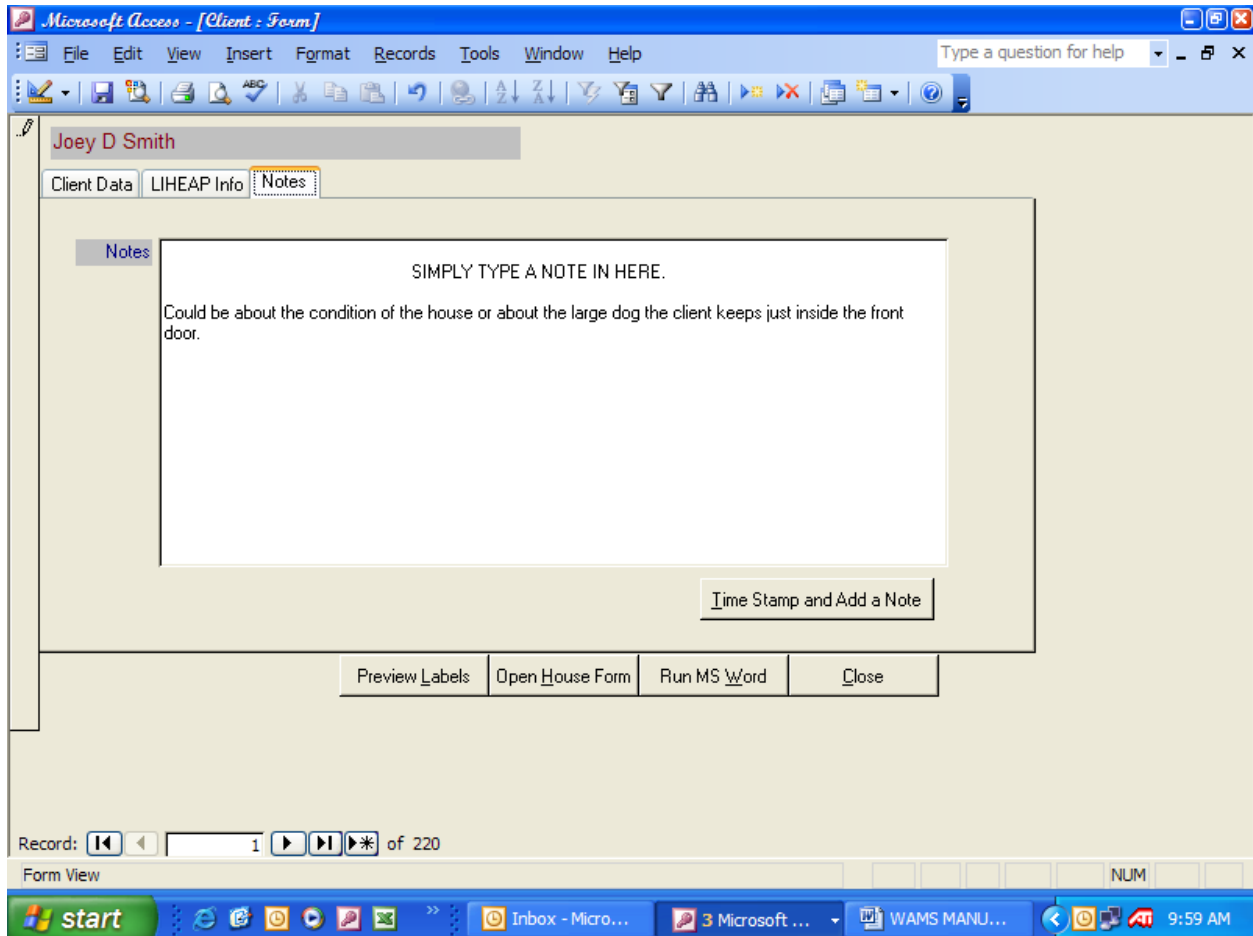
- Receiving ECIP (ECP): [Empty text box]
- LIHEAP Status (LHP): P
- Approval Date (DAT): 01/03/2006
- Time Application Taken (TIM): [Empty text box]
- Reason Denied LIHEAP Assistance (DEN): 0 [Dropdown menu]

At the bottom of the form, there are buttons for "Preview Labels", "Open House Form", "Run MS Word", and "Close". The record navigation bar shows "Record: 1 of 220". The Windows taskbar at the bottom shows the Start button, system tray, and open applications including "Inbox - Micro...", "3 Microsoft...", and "WAMS MANU...". The system clock shows "9:41 AM".

FIELD TITLE	DEFINITION/DESCRIPTION
Receiving ECIP	<u>Y</u> es/ <u>N</u> o – did the household receive ECIP services?
Approval Date	Date application was approved. If you are manually entering the data, you will need to complete this field.
Time Application Taken	Time of LHEAP application
Reason Denied LHEAP Assistance	LHEAP code for application denial

NOTES Tab

This is a memo field to enter any other pertinent information. This screen has a TIME STAMP and ADD A NOTE button. Use this to identify when various memos were added to the record.



At the bottom of the **CLIENT DATA** screens are four buttons

Preview Labels

To run the query to create client labels for folders or letters.

Open House Form

Takes you directly to **HOUSE DATA** without going through the **MAIN SWITCHBOARD**. **HOUSE DATA** will be filtered to just the current file.

DO NOT USE THIS BUTTON WHEN THE WX FILE NUMBER IS FIRST ASSIGNED. IT WILL CORRUPT THE FILE. After assigning the WX file number, always close to go back to the MAIN SWITCHBOARD.

Run MS Word

Opens the Microsoft Word program to create letters

Close

Closes **CLIENT DATA** and return to **MAIN SWITCHBOARD**

From: **MAIN SWITCHBOARD**

HOUSE DATA

This section contains several tabs across the top of the screen: *House Data, MatTemp, Bid, Tech Info, After WX, Mat Final, Cost Final, Heating Fuel Data, Electric Data, and Notes.* Some of this information will be imported from LHEAP.

There are also several buttons along the bottom of the screens. Some of them simply help move between screens for the current open client file, others produce required reports. To use them, place the cursor on the desired button and click once. These buttons are discussed later in this section.

House Data Tab

Usually a portion of this screen is imported from LHEAP. If imported from LHEAP please verify accuracy of information. If you have an application taken outside the LHEAP process, you will complete this section.

The screenshot shows the Microsoft Access application window titled "Microsoft Access - [House]". The "HouseData" tab is active, displaying a form with the following fields and values:

- WXFileNumber: 02-06-2665-07-0
- Primary Address: 6920 19TH AVE
- Street: 6920 19TH AVE
- Apt/Lot #: [Empty]
- Zip Code: 52346
- City: Van Horne
- Secondary Address: 6920 19TH AVE
- County: 06 BENTON
- Number Of Rooms(RIH): 6
- Sq Ft of House(SquareFootage): 2240
- Volume of House(VOL): 21536
- Client Priority Number: 1904.10
- Agency Number: 02C
- Heating Fuel Vendor: 4136
- Electricity Vendor: 2186
- LandlordID: [Dropdown]
- Print Landlord Letter: [Button]
- Work Phone (WPH): [Field]
- Home Phone (HPH): 319-241-1730
- Housing Type(HGT): H
- Housing Status(HTC): B
- Heating Source(HTS): P
- Mthly Rent Costs(HCS): \$700.00
- Subsidized Rent(HGN): N
- Heat In Rent?(UTH): N
- Reason Denied WX: [Dropdown]
- Show CLP Messages: [Checkbox]
- HACAP: [Field]
- Primary Account Number(ACN): SWINTER
- Secondary Account Number(SAN): 166402

At the bottom of the form, there is a navigation bar with buttons: ErrorCheck, HouseData, MatList, MatDetail, Interview, Landlord, Client, Activate, Run MS Word, and Close. The status bar shows "Record: 3 of 172" and "Form View".

FIELD TITLE	DEFINITION/DESCRIPTION
WX File Number	Usually assigned in CLIENT DATA , but can be completed here
Primary Address	Physical address for the house
Street	Street address including street number, street direction and street name (i.e. 620 W. Main Street)

Apt/Lot #	Apartment or lot number for the house, if applicable
Zip Code	Enter the zip code for the address. The program will complete the CITY and STATE fields based on the zip code.
Secondary Address	Mailing address if different from primary address (i.e. P.O. Box)
County	Enter correct county number. The program will complete the county name based on county number.
Number of Rooms	Enter the number of bedrooms in the house.
Sq Ft of House	This can be completed from the property tax assessment or actual WX evaluator measurements at the time of evaluation. If there is no fuel usage data, the program uses this number to determine Client Priority.
Volume of House	Enter the actual volume of house after evaluation is complete.
Client Priority Number	Calculated field based on actual fuel usage or square feet of house.
Agency Number	Your specific agency number. Select from drop down if uncertain.
Heating Fuel Vendor	Enter vendor code
Electric Vendor	Enter vendor code
Landlord ID	Use drop down to determine if the landlord is included in your database. If not, it needs to be added.
Print Landlord Letter	This can be used to merge landlord name and address to create letters or landlord agreements. After marking, go back to the main switchboard and then into REPORTS/LETTERS to create the query for landlord letters. Letters must be produced in Word using the mail merge feature.
Work Phone	Self explanatory
Home Phone	Self explanatory
Housing Type	Use drop down to select code for type of house
Housing Status	Use drop down to select code for house status
Heating Source	Use drop down to select code for type of heating fuel
Monthly Rent Costs	Amount of rent paid by client, if applicable
Subsidized Rent	<u>Y</u> es/ <u>N</u> o – is a portion of rent paid by someone else
Heat In Rent	<u>Y</u> es/ <u>N</u> o – is the cost of heat included in the rent payment
Denied WX	Use drop down to select codes for reason house was denied WX

Mat Temp Tab

This is a blank screen until the file is activated. After the WX file number is assigned, click once on the ACTIVATE button along the bottom of the screen. Three messages will appear, just click OK on each message. Just to the right of the client name at the top of the screen, the word ACTIVATED will appear. The full material database will then be available for data entry.

Mat Temp is used to enter actual material, labor, support costs for all programs. It can accommodate Flat Rate or Contractors or Crews. Materials are pre-programmed. There are also several blank records in case something unusual or different is used. The list of materials and sequence numbers is included in this manual.

Mat Temp may also be used to produce bid sheets for contractors. By filling in quantity, a blank bid sheet can be produced.

It is very important to complete all the information on this screen. This information is utilized in the program evaluation process.

FIELD TITLE	DEFINITION/DESCRIPTION
WX File Number	Will be assigned in CLIENT DATA
Agency File Number	Imported from LHEAP or assigned in CLIENT DATA
Find Seq #	Either type the desired sequence number or use the drop down to locate the material item used.

Select	By placing the cursor in this field and clicking once, the record will be marked to be included for this client. If you have accidentally selected the wrong material record, simply click in the select box to un-mark it.
Seq #	Locators for each material. This field is locked so the sequence numbers cannot be changed.
Work Item	Brief description of material or work to be completed.
Catalog #	This field indicates the general type of measure installed (i.e. Insulation or infiltration or repair, etc)
Program	Fill in the program to be charged. If a material is to be charged to DOE-07 then in the Program field D07 should be entered. If a utility is to be charged, use P (for primary utility) or S (for secondary or electric utility) followed by the first two digits of the vendor code (i.e. something to be charged to MEC as primary vendor would be coded P19).
Crew/Contr/Furnace	Indicate type of labor being used: 1 = Agency staff (crew) 2 = Private contractor 3 = Furnace contractor
Note (Location)	Memo field for notes about material installation location or for instructions to crews or contractors
Cost Category	These are pre-determined based on Catalog #. This information is used to summarize costs on the cost final tab.
Insulation	Indicate type of insulation being installed C = cellulose insulation F = fiberglass insulation X = other These codes are already completed in the insulation records. If you have records other than the pre-set ones, you need to check for the proper code.
User	Indicate user type of insulation Blank = regular blown cellulose 1 = fiberglass batts 2 = high cost cellulose (such as stucco or steel siding)
Reins	<u>Yes/No</u> – did you install new insulation on existing insulation (reinsulate)
RValue	R-value of insulation added. These codes are already completed in the insulation records. If you have records other than the pre-set ones, you need to check for the proper code.
Notes: Work Item	Memo field for any additional information you need to record about the specific item. You can also provide information for the state in this record.

Measure These codes are already completed in the records. If you have records other than the pre-set ones, you need to check for the proper code.

Ob/Wrk This field marks records as obligated or work in process.
O = obligated
W = work in process

The next line is for agencies using Flat Rate

Quantity Fill in Quantity of material used

The Hourly Rate, Hours, Labor, Cost of Materials are pre-set in the MatTemp Template.

The computer will then multiply the costs out for you. Flat rate users will also need to complete the AREA field in the next section for all insulation records.

The next section is for agencies using contractor or crews

Information will be entered on the Total line. The Original and Change lines are used for NEATShell calculations.

Area Indicate the square feet insulated for all insulation records.

Quantity Fill in Quantity of material used

Depth Used for insulation records to indicate depth of insulation to be installed. Is not required information

Labor Fill in total labor costs for that material item

Material Fill in total material costs for that material item

Support The per home support is recorded in record sequence number 1030 for completed home, 1040 for primary utility, 1050 for secondary utility and 1060 for incomplete homes. Support will not be recorded in any other records.

Sequence number 1030, completed home support, is a calculated record. All you need to do is select the record and assign a program to be charged. When the date of completion is entered on the After WX screen, the support will be calculated. The other support sequence number will need to be calculated and completed by agency.

Total The total field will be calculated as you leave the record.

All agencies will use the rest of these fields.

Vendor The vendor field is for primary fuel vendor number and should already be completed

Landlord Contribution If a landlord contributes cash toward the project it should be entered here as a negative number.

WX File Number Assigned in Client Data

Date of Completion Will be completed from the After WX Screen.

On the right side of the screen are three buttons *Edit Splits Table*, *Create Splits*, *Uncheck 100% Records*. These are for NEATShell users. They will create the 80/20 split for insulation records for utility expenditures. If you are using this feature, it must be completed BEFORE you activate the house. Any necessary corrections, such as change orders or cost adjustments should also be made before splitting the costs.

Edit Splits Table

Click on this to indicate which program will be charged for 80% of the insulation and which one will be charged the 20%.

When you click on the button, a message will pop up to “Enter PRG1 and PRG2 on First Line Only”. Click OK

A table will open showing all the insulation records which have been imported through the NEATShell. On the first record only, locate the PRG1 field and enter the weatherization program which is going to pay for 80% of the insulation costs. Then go the PRG2 field and enter the weatherization program which is going to pay for 20% of the insulation costs.

Close the table.

Create Splits

Click on this to actually create the 80% and 20% records. You can now scroll through the mat temp records to see that the insulation, which was all recorded as 100%, is now also split between two programs as 80/20.

UnCheck 100% Records

Click on this to un-select the 100% records so only the 80/20 records will be included in the total cost of the house.

General Material Data Entry Information

Furnace Replacement

1. All furnace replacement materials such as duct work, gas lines, and the furnace will be grouped into one record if only one funding source is used.
2. Furnace replacements will be reported in sequence #9120 or 9230 for high efficiency (92% AFU or higher) or sequence # 9110 if not high efficiency (80% or higher). Electric heating systems, boilers and heat pumps have different sequence numbers.
3. If splitting the cost of replacement between weatherization and a utility contract the total quantity should not exceed the number of furnaces installed.
4. Venting repair/replacement is a separate charge and will be reported on sequence #8780 or 8781 depending on the funding source.

Infiltration

1. Category A00.00 – Measure A includes all by-pass sealing (rigid foam, tough R, yellow board, etc.)
2. Category A00.00 – Measure B includes all general infiltration measures (weatherstrip, caulk, sweeps, etc.)

Insulation

1. Insulation may be split between funding sources. Regular weatherization programs such as DOE and HEAP will pay for all types of insulation. Utility weatherization programs will pay for specific insulation measures (see current utility contracts for details) for their customers.
2. If more than one funding source is used, the number of square feet in the AREA field will be proportional to the insulation cost split.
3. Insulation measures for clients living in all electric homes, who are customers of one of the participating utility companies, will be charged to the secondary utility. Always read secondary utility company as the electric company even if it is the main source of heat.

Water Heating Measures

1. Faucet aerators, pipe wrap and showerheads may be charged to either regular weatherization (DOE or HEAP) or to the utility contracts.
2. If charging water heating measures to a utility contract, charge the primary utility if the water heater is natural gas or the secondary utility if the water heater is electric. Remember the utility company must supply the fuel to the water heater.
3. The number of water heating measures installed must not exceed the current contract limits.
4. The amount charged for water heating measures installed must not exceed the current contract limits.

Refrigeration Measures

1. Refrigerators may be charged to either regular weatherization (DOE or HEAP) or a secondary utility (within utility contract limits).
2. Freezers may be charged to either HEAP or a secondary utility (within utility contract limits).
3. If splitting the cost of a refrigeration unit between weatherization and a utility contract, the total quantity must not exceed the total number of units installed.

Tech Info Tab

This screen is used to record the technical data required for each file including blower door readings and CO readings. Information from this screen will be reported on the House Data Report.

The screenshot shows the Microsoft Access application window titled "Microsoft Access - [House]". The "Tech Info" tab is selected. The form contains the following data:

- WXFileNumber: 02-06-2665-07-0
- SHERI WINTER
- Blower Door Test: Pre-WX: 3266, Post-WX: 1467, Change in cfm: 1799 cfm50
- Attic By-Pass Leakage Test: Method: (dropdown), Beginning cfm: 0, Ending cfm: 0, Change in cfm: 0 cfm50
- Garage Leakage Test: Method: (dropdown), Beginning cfm: 0, Ending cfm: 0, Change in cfm: 0 cfm50
- Carbon Monoxide Test:
 - Pre-WX: Furnace: 0, Water Heater: 0, Stove: 0, Other: 0
 - Post-WX: Electric Furnace: Y, Electric Water Heater: Y, Electric Stove: Y
 - Water Heater Fuel: E

At the bottom of the form, there are navigation buttons: ErrorCheck, HouseData, MatList, MatDetail, Interview, Landlord, Client, Activate, Run MS Word, and Close. The status bar shows "Record: 3 of 172" and "Form View".

FIELD TITLE	DEFINITION/DESCRIPTION
WX File Number	Will be assigned in CLIENT DATA
Blower Door Test	
Pre WX	Blower door reading at the time of evaluation
Post WX	Blower door reading at the time of final inspection
Change in CFM	Field will be calculated by the program
Attic By-Pass Leakage Test	<i>This is not required – but should be reported if test is completed</i>
Method	Select method used from the drop down menu
Beginning CFM	Total leakage path at time of evaluation
Ending CFM	Total leakage path at time of inspection
Change in CFM	Field will be calculated by the program

Garage Leakage Test

Method
Beginning CFM

This is required for all attached or tuck-under garages

Select method from drop down
House to zone reading at time of evaluation

Ending CFM

House to zone reading at time of inspection

Change in CFM

Field will be calculated by the program

Carbon Monoxide Test

Furnace

If an appliance is electric, click in the box at the end of the row

Enter pre- and post-weatherization CO readings

Water heater

Enter pre- and post-weatherization CO readings

Stove

Enter pre- and post-weatherization CO readings

Other

Enter pre- and post-weatherization CO readings for other gas fired appliances

Water Heater Fuel

Enter fuel type for the water heater – N (natural gas), E (electric) P (liquid propane LP)

After WX tab

This screen is used to record the evaluation and completion dates, evaluator and inspector names, crews and/or contractor names and other information concerning the completion of the house.

FIELD TITLE	DEFINITION/DESCRIPTION
WX File Number	Will be assigned in CLIENT DATA
Date of Evaluation	Self explanatory
Completed	Yes / No – Is the house completed
Agency File Number	Will be assigned in CLIENT DATA
Agency Number	Will be assigned in CLIENT DATA – should always be local agency identifier
Crew Contractor	Name or identifier of the agency crew completing the work. This can be completed from the Agency Staff information.
Private Contractor	Name of the contractor completing the work. This can be completed from the Agency Staff information.
Furnace T&C Contractor	Name of the furnace contractor completing the tune and clean. This can be completed from the Agency Staff information.

Furnace Replacement Contractor	Name of the furnace contractor replacing the furnace. This can be completed from the Agency Staff information.
Job Evaluated By	Name of the evaluator. This can be completed from the Agency Staff information.
Job Inspected By	Name of the inspector. This can be completed from the Agency Staff information.
Date of Completion	Date the file is closed – whether complete or closed-incomplete. If materials are changed or edited, reenter the DOC to update the automatic fields.
Reweatherized	<u>Yes</u> / <u>No</u> – was the house previously weatherized by the agency
Appointment Date	Date scheduled for evaluation
Appointment Time	Time scheduled for evaluation
Refrigerator Replaced	Number of refrigerators replaced – this will be filled in by the program when the DOC is entered
Freezer Replaced	Number of freezers replaced – this will be filled in by the program when the DOC is entered
Furnace	<u>Yes</u> / <u>No</u> – this will be filled in by the program when the DOC is entered
Program	This will be filled in by the program when the DOC is entered
Work In Process	<p>The Summary Report includes a line for Work in Process. This line is completed from the MATFINAL database. In order to have the computer fill in this field, you must have the materials entered into the program:</p> <ul style="list-style-type: none"> ▪ Enter materials in MATTEMP including all required information ▪ Go to the After WX tab, complete all information – the house should be marked as NOT complete. ▪ Fill in the Date of Completion field to move the records to MATFINAL. Delete that date immediately. ▪ In Mat Final screens, mark all records with a W (for work in process). After all the records are marked, click on the UPDATE button. <p>The total costs of the materials/labor should now be showing in the After WX screen. These costs will be totaled and reported on the Summary Report.</p> <p>To report a house once it is complete, go to the MAT FINAL screen, delete the completion date in each record. Then on the After WX screen, enter the actual date of completion.</p>
Heating System Replacement Costs	The total cost of heating system replacement – this will be filled in by the program when the DOC is entered
Total Materials and Labor	The total cost of materials and labor reported – this will be filled in by the program when the DOC is entered.

Mat Final Tab

This screen allows you to view all the selected materials records without having to go through the entire materials list. You may edit the records in the Mat Final screen, but you must go back to the After WX screen and re-enter the Date of Completion to confirm any edits.

The screenshot shows the 'Materials - Final' form in Microsoft Access. The form is titled 'Materials - Final' and displays a record for 'Memo field for color/direction'. The record is highlighted in cyan. The form includes several fields and tables:

- Agency File Number:** 02-06-2620-06-0
- Client Name:** RICHARD FRAZIER
- Agency File Number:** 2147385285
- Update:** Buttons for navigation (left, right, double left, double right)
- Table 1:**

FLAT BID	Quantity	Hourly Rate	Hours	Labor	Cost of Material	Support	Flat Bid Total
	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
- Table 2:**

	Quantity	Depth	Labor	Material	Support	Area
Original	0	0	\$0.00	\$0.00	\$0.00	
Change	0	0	\$0.00	\$0.00	\$0.00	
Total	1	0	\$0.00	\$0.00	\$0.00	\$0.00
- Vendor:** 1200
- LandlordContribution:** \$0.00
- CompletionDate:** 06/30/2007
- WxFileNumber:** 02-06-2620-06-0

At the bottom of the form, there are navigation buttons: ErrorCheck, HouseData, MatList, MatDetail, Interview, Landlord, Client, Activate, Run MS Word, Close. The status bar shows 'Record: 1 of 20' and 'Form View'.

To scroll through the selected material records, use the arrow buttons located under the client's name.

Cost Final tab

This screen allows agency review, by cost category, total charges to the house. These are split between flat rate and crew/contractor totals. It also indicates the number of material records in each cost category. This is simply a tool to help review agency costs.

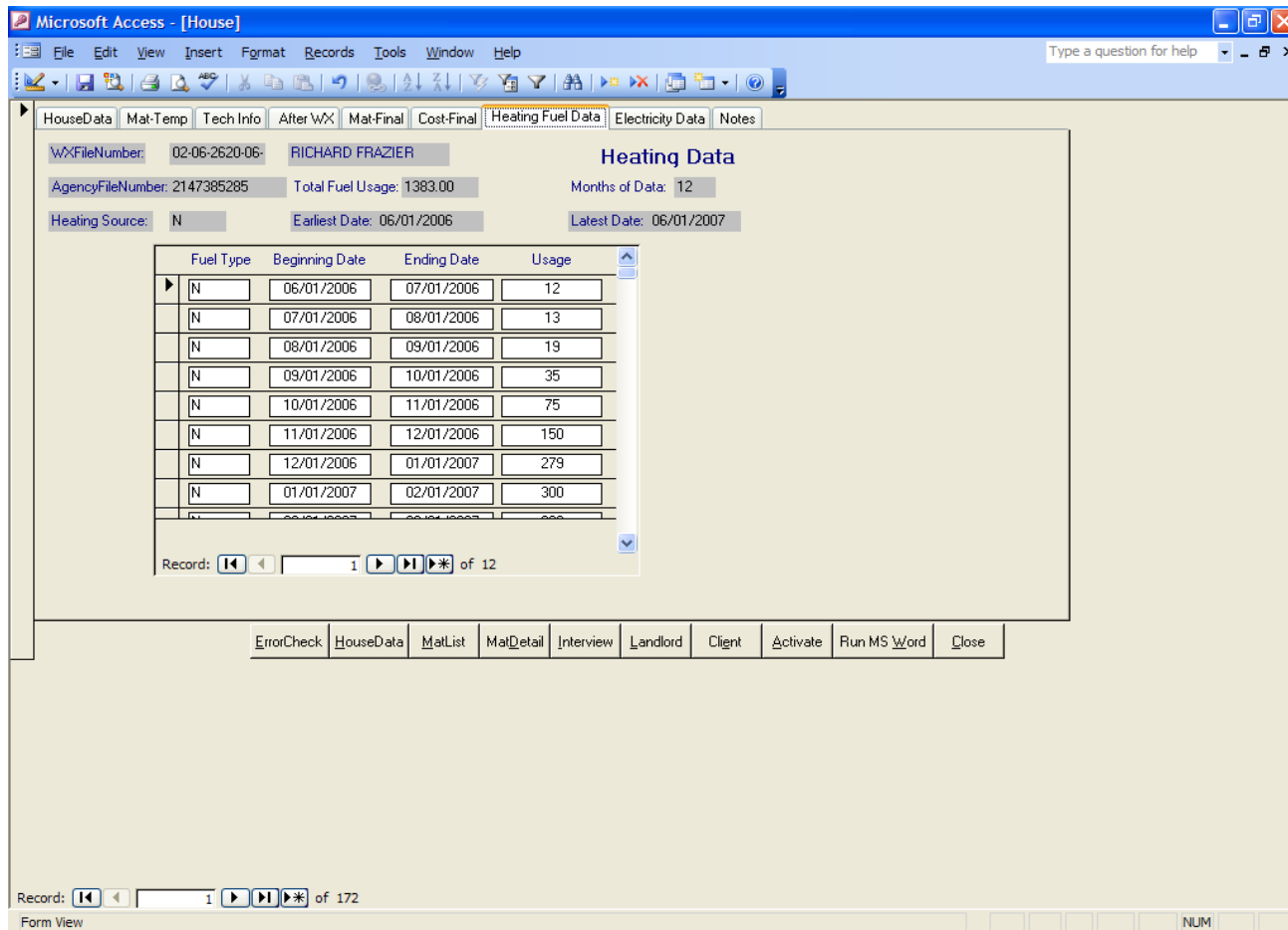
The screenshot shows the Microsoft Access application window titled "Microsoft Access - [House]". The "Cost-Final" tab is active, displaying a form for reviewing costs. At the top, the "W\XFileNumber" is "02-06-2620-06-0" and the name is "RICHARD FRAZIER". Below this, there are two input fields for "Totals": "\$10,154.90" and "\$0.00", with an "Update Final Cost" button to the right. The main part of the form is a table with the following data:

Cost Category	BidTotal	FlatBidTotal	Count
A	\$239.00	\$0.00	1
H	\$4,473.51	\$0.00	8
I	\$2,145.00	\$0.00	1
M	\$2,823.39	\$0.00	4
R	\$390.00	\$0.00	1
U	\$84.00	\$0.00	5

Below the table, there are navigation controls: "Record: 1 of 6". At the bottom of the form, there are buttons for "ErrorCheck", "HouseData", "MatList", "MatDetail", "Interview", "Landlord", "Client", "Activate", "Run MS Word", and "Close". The status bar at the bottom shows "Record: 1 of 172" and "Form View".

Heating Fuel Data tab and Electric Data tab

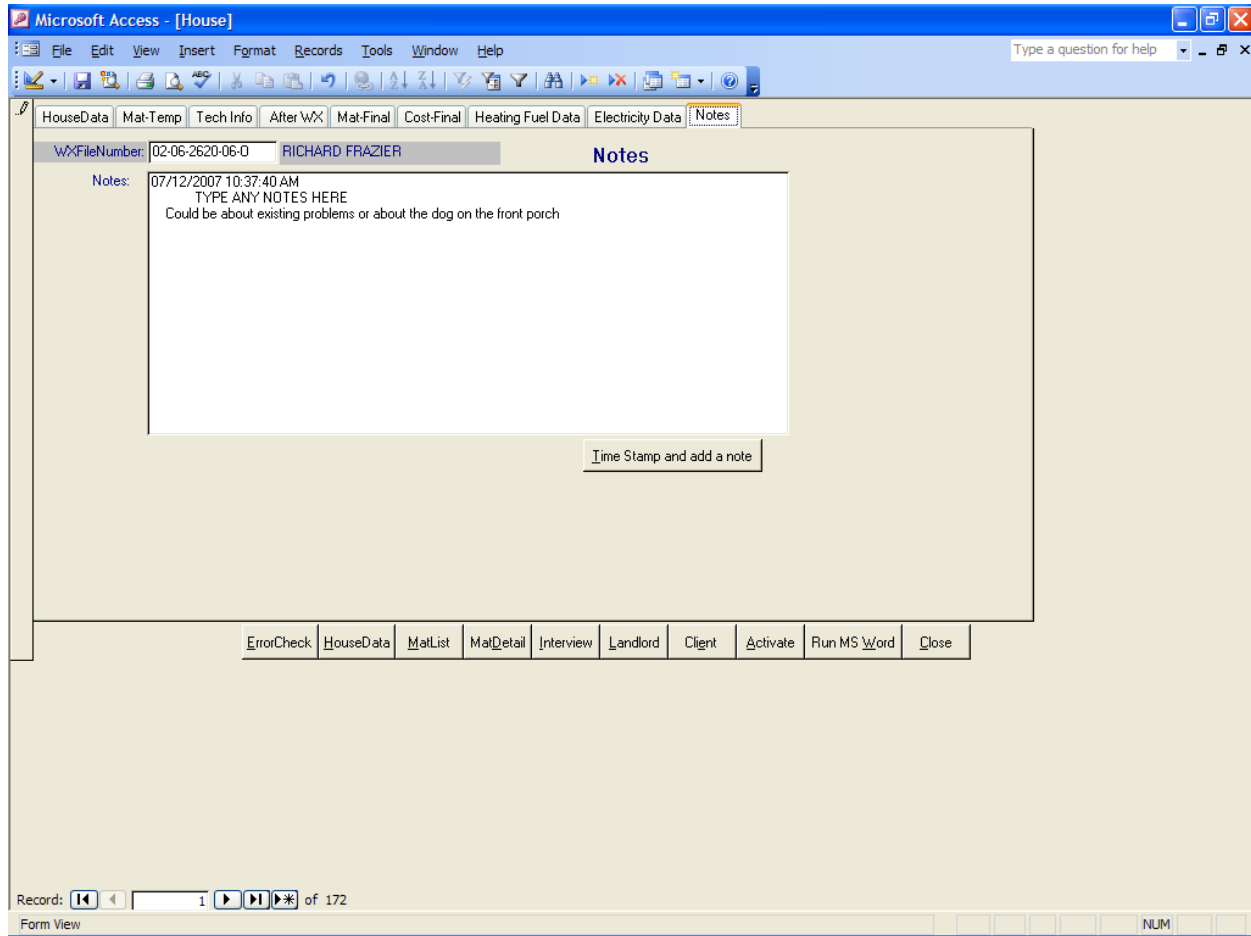
These tabs are used to record fuel usage data (both heating and electric) for the house. If the house is a customer of one of the three investor-owned regulated utilities, this data will be provided. If the house heats with a deliverable fuel or fuel provided by a municipal utility or a rural cooperative, data will need to be collected and entered in these screens. Data may be entered either by month or as a lump sum. If entering by month, be sure the beginning date is the same as the ending date of the previous month.



FIELD TITLE	DEFINITION/DESCRIPTION
Fuel Type	This is provided from the House Data screen
Beginning Date	The beginning date of the fuel usage period
Ending Date	The ending date of the fuel usage period
Usage	Amount of fuel used during the period

Notes tab

This is a memo screen to record any information about the house. This information will be printed out on the House Data Report. This screen has a Time Stamp and Add a Note Button to identify when various memos were added to the record. Directions to the house should go either here or in sequence number 1010 in the Mat Temp screen.



HOUSE DATA BUTTONS

There are several buttons along the bottom of the House Data screens. Some of them simply help move between screens and others are used to produce reports. To use these, place the cursor on the desired button and click once.

Error Check button – runs a series of checks on the data to assure accuracy and completeness of the data before any reports are produced.

House Data button – produces the House Data Report which includes all the client information, demographics, technical information and agency staff information as well as any notes or information included in the memo field. A sample of this form is included in this manual. **This report is required for all houses and must be in the file.**

Mat List button – produces the list of measures installed in the houses. This report is sorted by Program, Labor Type and Cost Category with a subtotal of costs at the end of each section. Review this report on screen for accuracy before printing. **This report is required for all houses and must be in the file.**

Mat Detail button – produces the list of measures installed in the house in sequence number order. It is not broken down by program. This is a tool only to be used for a quick look at measures and overall totals.

Interview button – opens a form, which is also available in the Other Information section from the Main Switchboard. This form asks very basic questions about the house and its' use. This can be completed before scheduling an evaluation so the evaluator has an idea of the condition of the house.

Landlord button – opens a screen for searching or data entry in the landlord database

Client button – opens the CLIENT DATA screens filtered to the open file

Activate button – activates the Mat Temp screen by importing the pre-programmed Mat Temp Template. This was discussed earlier in the section.

Run MSWord button – opens MSWord to create letters

Close button – closes House Data to return to the Main Switchboard

FORMS & SAMPLES

SAMPLE – House Data Report

House Data Report

North Iowa Community Action

Jane Doe 316 N Lincoln St Jackson 316 N Lincoln St LAKE MILLS IA 50450 Jackson	LIHEAP Approval Date: 10/04/2005
641-592-2172	Date Evaluated: 02/26/2007 Evaluator: Jamie
08-95-23-06	Date Completed: 06/30/2007 Inspector: Jamie
Priority Number: 438.2405	Crew: TOTAL HRS 55
Agency File Number: 95-953822	Contractor:
Total Materials/Labor: \$3,048.22	Furnace Tune & Clean: Smith's Hardware
Housing Type: O House	Furnace Replacement:
1920	Completed?: Y ReWeatherized?: N
Heating Source: N Natural Gas	Volume: 15360 Square Feet:
UVC: 1600 PEOPLES NATURAL GAS-OMAHA	Account Number: 5896 4124 90
SVC: 2088 LAKE MILLS MUNIC UTILITIES	Account Number: 1004050

Blower Door Readings:

Attic By-Pass Leakage:

Attached Garage Leakage:

cfm start: 1183	cfm attic start: 0	cfm garage start: 0
cfm final: 1100	cfm attic final: 0	cfm garage final: 0
cfm change: 83	cfm attic change: 0	cfm garage change: 0
	Method:	Method:

CO Readings:

	Pre WX	Post WX	Electric/Other
Furnace:	35	20	
Water Heater:	24	24	
Stove:	4	4	
Other:	0	0	

Notes:

SAMPLE – Materials List

07/16/2007 01:36 PM
 08-95-23-06 Jane Doe
 PRG D07

Seq	WORKITEM	Ctgr	Mea	LaborType	Area	Qty	Materials	Labor	Support	Total
Labor Type:										
1010	Memo field for color/direction	M				1	\$0.00	\$0.00	\$0.00	\$0.00
	1. GARGAGE NOT ATTACHED (BREEZEWAY BETWEEN THE TWO) 2. NO INFILTRATION 3. ROOM EAST OF GARAGE IS NOT PART OF HEATED HOUSE (3 SEASONS ROOM)									
							Cost Category M Total:	\$0.00	\$0.00	\$0.00
							Labor Type Total:	\$0.00	\$0.00	\$0.00
Labor Type: 1										
3180	Metal damming - heat source (per unit) unit = 10 ft	H	DM	1		5	\$4.12	\$15.86	\$0.00	\$19.98
8680	Carbon monoxide detector	H	C	1		1	\$39.88	\$15.86	\$0.00	\$55.74
							Cost Category H Total:	\$44.00	\$31.72	\$0.00
2430	Attic insulation (per lb.) (20%)	I	CI	1	192	278	\$54.52	\$22.20	\$0.00	\$76.72
2830	Sidewall insulation (per lb.) (20%)	I	WI	1	205	82	\$15.98	\$50.74	\$0.00	\$66.72
5230	Bandjoist insulation (6"x16") (20%)	I	BI	1	16	12	\$6.80	\$9.51	\$0.00	\$16.31
							Cost Category I Total:	\$77.30	\$82.45	\$0.00
1030	Complete home --Support	M	S	1		1	\$0.00	\$0.00	\$1,066.88	\$1,066.88
							Cost Category M Total:	\$0.00	\$0.00	\$1,066.88
8030	Air conditioning - room	U	R	1		1	\$0.00	\$0.00	\$0.00	\$0.00

8040	Meter refrigerator 1, no action 02:00;0.2100	U		1	1	\$0.00	\$0.00	\$0.00	\$0.00
8070	Meter freezer 1, no action 02:00;0.0200	U		1	1	\$0.00	\$0.00	\$0.00	\$0.00
8170	Compact fluorescent 15W	U	T15	1	12	\$25.68	\$42.72	\$0.00	\$68.40

Cost Category U Total: \$25.68 \$42.72 \$0.00 \$68.40

Labor Type 1 Total: \$146.98 \$156.89 \$1,066.88 \$1,370.75

Labor Type: 2

8061	Exchange refrigerator 2	U		2	1	\$560.00	\$0.00	\$0.00	\$560.00
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Cost Category U Total: \$560.00 \$0.00 \$0.00 \$560.00

Labor Type 2 Total: \$560.00 \$0.00 \$0.00 \$560.00

Labor Type: 3

9010	Furnace tune and clean	F		3	1	\$0.00	\$50.00	\$0.00	\$50.00
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Cost Category F Total: \$0.00 \$50.00 \$0.00 \$50.00

Labor Type 3 Total: \$0.00 \$50.00 \$0.00 \$50.00

Program D07 Total: \$706.98 \$206.89 \$1,066.88 \$1,980.75

PRG P16

Seq	WORKITEM	Ctgr	Mea	LaborType	Area	Qty	Materials	Labor	Support	Total
2420	Attic insulation (per lb.) (80%)	I	CI	1	768	1114	\$218.08	\$88.79	\$0.00	\$306.87
2820	Sidewall insulation (per lb.) (80%)	I	WI	1	819	326	\$63.92	\$393.22	\$0.00	\$457.14

						Cost Category I Total:	\$282.00	\$482.01	\$0.00	\$764.01
1040 Support -- Primary Utility	M	S	1		1	\$0.00	\$0.00	\$88.44	\$88.44	
						Cost Category M Total:	\$0.00	\$0.00	\$88.44	\$88.44
6310 Miscellaneous Repairs - Utility Funds (max \$300)	R		1		1	\$16.50	\$31.71	\$0.00	\$48.21	
						Cost Category R Total:	\$16.50	\$31.71	\$0.00	\$48.21
8320 Showerheads	U	H	1		1	\$4.00	\$0.00	\$0.00	\$4.00	
8330 Faucet aerators	U	30	1		2	\$1.00	\$0.00	\$0.00	\$1.00	
8340 Pipe wrap	U	30	1		2	\$1.88	\$0.00	\$0.00	\$1.88	
						Cost Category U Total:	\$6.88	\$0.00	\$0.00	\$6.88
						Labor Type 1 Total:	\$305.38	\$513.72	\$88.44	\$907.54
						Program P16 Total:	\$305.38	\$513.72	\$88.44	\$907.54
						WXFileNumber 08-95-23-06 Total:	\$1,012.36	\$720.61	\$1,155.32	\$2,888.29

Materials Template

SEQ	Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	ReIn	RVal
1010	Memo field for color/direction	M00.00	0		0		0	0				M				
1020		M00.00	0	0	0	0	0	0				M				
1030	Complete home --Support	M00.00	0	0	0	0	0	0	S			M				
1040	Support -- Primary Utility	M00.00	0	0	0	0	0	0	S			M				
1050	Support -- Secondary Utility	M00.00	0	0	0	0	0	0	S			M				
1060	Not completed home -- Support	M00.00	0	0	0	0	0	200	S			M				
1070		M00.00	0	0	0	0	0	0				M				
1080		M00.00	0	0	0	0	0	0				M				
1090		M00.00	0	0	0	0	0	0				M				
1100	Landlord contribution -- cash	M00.00	0	0	0	0	0	0	L			M				
1110	Landlord contribution -- furnace replace	M00.00	0	0	0	0	0	0	LF			L				
1120	Landlord contribution -- water heater replace	M00.00	0	0	0	0	0	0	LW			L				
1130		M00.00	0	0	0	0	0	0				M				
1140		M00.00	0	0	0	0	0	0				M				
1150		M00.00	0	0	0	0	0	0				M				
1160		M00.00	0	0	0	0	0	0				M				
1170		M00.00	0	0	0	0	0	0				M				
2110	Attic insulation (per lb.) (100%)	I00.01	0	20	0.012	0.25	0.25	0	CI	I	C					R11
2120	Attic insulation (per lb.) (80%)	I00.01	0	20	0.012	0.25	0.25	0	CI	I	C					R11
2130	Attic insulation (per lb.) (20%)	I00.01	0	20	0.012	0.25	0.25	0	CI	I	C					R11
2140		I00.01	0	20					CI	I	C					R11
2150	Attic insulation (per sq ft.) (100%)	I00.01	0	20	0.03	0.6	0	0	CI	I	F					R11
2160	Attic insulation (per sq ft.) (80%)	I00.01	0	20	0.03	0.6	0	0	CI	I	F					R11
2170	Attic insulation (per sq ft.) (20%)	I00.01	0	20	0.03	0.6	0	0	CI	I	F					R11
2180		I00.01	0	20	0	0	0	0	CI	I	C					R11
2210	Attic insulation (per lb.) (100%)	I00.02	0	20	0.012	0.25	0.25	0	CI	I	C					R19
2220	Attic insulation (per lb.) (80%)	I00.02	0	20	0.012	0.25	0.2		CI	I	C					R19

SEQ Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	Reln	RVal
2230 Attic insulation (per lb.) (20%)	I00.02	0	20	0.012	0.25	0.05		CI	I	C					R19
2240	I00.02	0	20					CI	I	C					R19
2250 Attic insulation (per sq ft.) (100%)	I00.02	0	20	0.03	0.6	0	0	CI	I	F					R19
2260 Attic insulation (per sq ft.) (80%)	I00.02	0	20	0.03	0.6	0	0	CI	I	F					R19
2270 Attic insulation (per sq ft.) (20%)	I00.02	0	20	0.03	0.6	0	0	CI	I	F					R19
2280	I00.02	0	20	0	0	0	0	CI	I	C					R19
2310 Attic insulation (per lb.) (100%)	I00.03	0	20	0.012	0.25	0.25		CI	I	C					R30
2320 Attic insulation (per lb.) (80%)	I00.03	0	20	0.012	0.25	0.2		CI	I	C					R30
2330 Attic insulation (per lb.) (20%)	I00.03	0	20	0.012	0.25	0.05		CI	I	C					R30
2340	I00.03	0	20					CI	I	C					R30
2410 Attic insulation (per lb.) (100%)	I00.04	0	20	0.012	0.25	0.25		CI	I	C					R38
2420 Attic insulation (per lb.) (80%)	I00.04	0	20	0.012	0.25	0.2		CI	I	C					R38
2430 Attic insulation (per lb.) (20%)	I00.04	0	20	0.012	0.25	0.05		CI	I	C					R38
2431	I00.04	0	0	0.012	0	0	0	CI	I	C					R38
2470 Labor only - extra work - attic insulation (max. 1 hour)	I00.00	0	20	1	20	0	0	CI	I	C					
2480	I00.04	0	20	0	0	0	0	CI	I	C					R38
2505 Floored attic insulation (per lb.) (100%)	I00.01	0	20	0.03	0.6	0.25	0	SI	I	C					R11
2506 Floored attic insulation (per lb.) (80%)	I00.01	0	20	0.03	0.6	0.2	0	SI	I	C					R11
2507 Floored attic insulation (per lb.) (20%)	I00.01	0	20	0.03	0.6	0.05	0	SI	I	C					R11
2510 Floored attic insulation (per lb.) (100%)	I00.02	0	20	0.03	0.6	0.25	0	SI	I	C					R19
2520 Floored attic insulation (per lb.) (80%)	I00.02	0	20	0.03	0.6	0.2	0	SI	I	C					R19
2530 Floored attic insulation (per lb.) (20%)	I00.02	0	20	0.03	0.6	0.05	0	SI	I	C					R19
2535 Floored attic insulation (per lb.) (100%)	I00.03	0	20	0.03	0.6	0.25	0	SI	I	C					R30
2536 Floored attic insulation (per lb.) (80%)	I00.03	0	20	0.03	0.6	0.2	0	SI	I	C					R30
2537 Floored attic insulation (per lb.) (20%)	I00.03	0	20	0.03	0.6	0.05	0	SI	I	C					R30
2540 Floored attic insulation (per lb.) (100%)	I00.04	0	20	0.03	0.6	25	0	SI	I	C					R38
2545 Floored attic insulation (per lb.) (80%)	I00.04	0	20	0.03	0.6	0.2	0	SI	I	C					R38
2546 Floored attic insulation (per lb.) (20%)	I00.04	0	20	0.03	0.6	0.05	0	SI	I	C					R38
2550	I00.00	0	20	0	0	0	0	SI	I	C					R19

SEQ Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	Reln	RVal
2560	I00.00	0	20	0	0	0	0	SI	I	C					R19
2570	I00.00	0	20	0	0	0	0	SI	I	C					R19
2580	I00.00	0	20	0	0	0	0	SI	I	C					R19
2610 Ceiling slants insulation (Fascia) (per lb.) (100%)	I00.02	0	20	0.03	0.6	0.25	0	SI	I	C					R19
2620 Ceiling slants insulation (Fascia) (per lb.) (80%)	I00.02	0	20	0.03	0.6	0.2	0	SI	I	C					R19
2630 Ceiling slants insulation (Fascia) (per lb.) (20%)	I00.02	0	20	0.03	0.6	0.2	0	SI	I	C					R19
2640	I00.00	0	20					SI	I	C					R19
2650	I00.00	0	20	0	0	0	0	SI	I	C					R19
2660	I00.00	0	20	0	0	0	0	SI	I	C					R19
2670	I00.00	0	20	0	0	0	0	SI	I	C					R19
2680	I00.00	0	20	0	0	0	0	SI	I	C					R19
2710 Ceiling slants insulation (Attic) (per lb.) (100%)	I00.02	0	20	0.025	0.5	0.25	0	SI	I	C					R19
2720 Ceiling slants insulation (Attic) (per lb.) (80%)	I00.02	0	20	0.025	0.5	0.2	0	SI	I	C					R19
2730 Ceiling slants insulation (Attic) (per lb.) (20%)	I00.02	0	20	0.025	0.5	0.05	0	SI	I	C					R19
2740	I00.02	0	20					SI	I	C					R19
2750 Ceiling slants insulation (Attic) (per sq ft.) (100%)	I00.02	0	20	0.03	0.6	0	0	SI	I	F					R19
2751 Ceiling slants insulation (Attic) (per sq ft.) (80%)	I00.02	0	20	0.03	0.6	0	0	SI	I	F					R19
2752 Ceiling slants insulation (Attic) (per sq ft.) (20%)	I00.02	0	20	0.03	0.6	0	0	SI	I	F					R19
2760	I00.02	0	20	0	0	0	0	SI	I	C					R19
2770	I00.02	0	20	0	0	0	0	SI	I	C					R19
2780	I00.02	0	20	0	0	0	0	SI	I	C					R19
2810 Sidewall insulation (per lb.) (100%)	I00.01	0	20	0.03	0.6	0.25	0	WI	I	C					R13
2820 Sidewall insulation (per lb.) (80%)	I00.01	0	20	0.03	0.6	0.2	0	WI	I	C					R13
2830 Sidewall insulation (per lb.) (20%)	I00.01	0	20	0.03	0.6	0.05	0	WI	I	C					R13
2840	I00.00	0	20					WI	I	C					R13
2850	I00.00	0	20	0	0	0	0	WI	I	C					R13
2860	I00.00	0	20	0	0	0	0	WI	I	C					R13
2870 Labor only - extra work - sidewall insulation (max. 3	I00.00	0	20	1	20	0	0	WI	I	C					R13
2880	I00.00	0	20	0	0	0	0	WI	I	C					R13

SEQ	Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	ReIn	RVal
2910	Sidewall insulation (per sq ft.) (100%)	I00.01	0	20	0.03	0.6	0	0	WI	I	F	2				R13
2920	Sidewall insulation (per sq ft.) (80%)	I00.01	0	20	0.03	0.6	0	0	WI	I	F	2				R13
2930	Sidewall insulation (per sq ft.) (20%)	I00.01	0	20	0.03	0.6	0	0	WI	I	F	2				R13
2940		I00.00	0	20	0	0	0	0	WI	I	C	2				R13
2950		I00.00	0	20	0	0	0	0	WI	I	C	2				R13
2960		I00.00	0	20	0	0	0	0	WI	I	C	2				R13
2970		I00.00	0	20	0	0	0	0	WI	I	C	2				R13
2980		I00.00	0	20	0	0	0	0	WI	I	C	2				R13
3010	Wall plugs (each)	I00.00	0	20	0.02	0.4	0.1		II	I						
3020		I00.00	0	20	1	20	0	0	II	I						
3030	Attic access (new hole) (labor only)	I00.00	0	20	0.5	10		0	II	I						
3040	Box around attic access (1"x12"x8')	I00.00	0	20	0.375	7.5	10.08	0	II	I						
3050	Attic access w/s	A00.00	0	20	0.25	5	15.92	0	A	A						
3060	Attic access lid (3/4 plywood) 1/4 sheet	I00.00	0	20	0.125	2.5	12.37	0	II	I						
3070	Attic access lid (insul door)	I00.00	0	20	0.125	2.5	0		II	I						
3080	Attic access insulation (6x15) per sq ft	I00.00	0	20	0.021	0.43	1		II	I						
3090	Attic access insulation (6x23) per sq ft	I00.00	0	20	0.021	0.43	1		II	I						
3100	Roof vents (w/black jack)	I00.00	0	20	0.75	15	11.22	0	II	I						
3110	Gable vent	I00.00	0	20	0.75	15	5.34		II	I						
3120	Gable vents (including lumber, brick mold)	I00.00	0	20	0.75	15	12.53	0	II	I						
3130	Gable vent (w/ outside attic access)	I00.00	0	20	0.75	15	14.33	0	II	I						
3140	Soffitt vents	I00.00	0	20	0.25	5	1.75	0	II	I						
3150	Black jack	I00.00	0	20	0.25	5	1.32	0	II	I						
3160	Soffitt vent chutes	I00.00	0	20	0.25	5	0.75	0	II	I						
3170	By pass blocks in attic (per block 64 sq in)	A00.00	0	20	0.065	1.3	0.29	0	A	A						
3180	Metal damming - heat source (per unit) unit = 10 ft	H00.00	0	20	0.125	2.5	8.8	0	DM	H						
3190	Re-inforced plastic (per sq ft)	I00.00	0	20	0.007	0.15	0.04		II	I						
3200	Misc Insulation Item	I00.00	0	20					II	I						
3210		I00.00	0	20	0	0	0	0		I						

SEQ Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	ReIn	RVal
3220	100.00	0	20	0	0	0	0	I							
3230	100.00	0	20	0	0	0	0	I							
3240	100.00	0	20	0	0	0	0	I							
4010 Kneewall insulation (3 1/2"x16") (100%)	100.00	0	20	0.03	0.6	0.25	0	KI	I	F	1				R11
4020 Kneewall insulation (3 1/2"x16") (80%)	100.00	0	20	0.03	0.6	0.2	0	KI	I	F	1				R11
4030 Kneewall insulation (3 1/2"x16") (20%)	100.00	0	20	0.03	0.6	0.05	0	KI	I	F	1				R11
4040	100.00	0	20					KI	I	F	1				R11
4050	100.00	0	20	0	0	0	0	KI	I	F	1				R11
4060	100.00	0	20	0	0	0	0	KI	I	F	1				R11
4070	100.00	0	20	0	0	0	0	KI	I	F	1				R11
4080	100.00	0	20	0	0	0	0	KI	I	F	1				R11
4110 Kneewall insulation (per lb) (100%)	100.00	0	20	0.03	0.6	0	0	KI	I	C					R13
4120 Kneewall insulation (per lb) (80%)	100.00	0	20	0.03	0.6	0	0	KI	I	C					R13
4130 Kneewall insulation (per lb) (20%)	100.00	0	20	0.03	0.6	0	0	KI	I	C					R13
4140	100.00	0	20	0	0	0	0	KI	I	C					R13
4150	100.00	0	20	0	0	0	0	KI	I	C					R13
4160	100.00	0	20	0	0	0	0	KI	I	C					R13
4170	100.00	0	20	0	0	0	0	KI	I	C					R13
4180	100.00	0	20	0	0	0	0	KI	I	C					R13
5110 Kneewall insulation (3 1/2"x23") (100%)	100.00	0	20	0.03	0.6	0.25	0	KI	I	F	1				R11
5120 Kneewall insulation (3 1/2"x23") (80%)	100.00	0	20	0.03	0.6	0.2	0	KI	I	F	1				R11
5130 Kneewall insulation (3 1/2"x23") (20%)	100.00	0	20	0.03	0.6	0.05	0	KI	I	F	1				R11
5140	100.00	0	20					KI	I	F	1				R11
5150	100.00	0	20	0	0	0	0	KI	I	F	1				R11
5160	100.00	0	20	0	0	0	0	KI	I	F	1				R11
5170	100.00	0	20	0	0	0	0	KI	I	F	1				R11
5180	100.00	0	20	0	0	0	0	KI	I	F	1				R11
5210 Bandjoist insulation (6"x16") (100%)	100.00	0	20	0.03	0.6	0.25	0	BI	I	F	1				R19
5220 Bandjoist insulation (6"x16") (80%)	100.00	0	20	0.03	0.6	0.2	0	BI	I	F	1				R19

<u>SEQ</u>	<u>Work Item</u>	<u>CAT</u>	<u>OQTY</u>	<u>HRS</u>	<u>RHRS</u>	<u>RLAB</u>	<u>RMAT</u>	<u>RSUP</u>	<u>Mea</u>	<u>Cost</u>	<u>Ctg</u>	<u>Insu</u>	<u>Use</u>	<u>T</u>	<u>Reln</u>	<u>RVal</u>
5230	Bandjoist insulation (6"x16") (20%)	100.00	0	20	0.03	0.6	0.05	0	BI	I	F	1				R19
5240		100.00	0	20					BI	I	F	1				R19
5250		100.00	0	20	0	0	0	0	BI	I	F	1				R19
5260		100.00	0	20	0	0	0	0	BI	I	F	1				R19
5270		100.00	0	20	0	0	0	0	BI	I	F	1				R19
5280		100.00	0	20	0	0	0	0	BI	I	F	1				R19
5310	Crawlspace insulation (3 1/2"x23") (100%)	100.00	0	20	0.03	0.6	0.25	0	FI	I	F	1				R11
5320	Crawlspace insulation (3 1/2"x23") (80%)	100.00	0	20	0.03	0.6	0.2	0	FI	I	F	1				R11
5330	Crawlspace insulation (3 1/2"x23") (20%)	100.00	0	20	0.03	0.6	0.05	0	FI	I	F	1				R11
5335	Crawlspace insulation - wet spray - (100%)	100.00	0	0	0.03	0	0	0	FI	I	C					
5336	Crawlspace insulation - wet spray - (80%)	100.00	0	0	0.03	0	0	0	FI		C					
5337	Crawlspace insulation - wet spray - (20%)	100.00	0	0	0.03	0	0	0	FI		C					
5340	Crawlspace insulation (1" celotex) (per sq ft) (100%)	100.00	0	20	0.03	0.6	0.34		FI	I		1				R06
5341	Crawlspace insulation (1" celotex)(per sq ft) (80%)	100.00	0	0	0.03	0	0	0	FI							
5342	Crawlspace insulation (1" celotex)(per sq ft) (20%)	100.00	0	0	0.03	0	0	0	FI							
5345	Crawlspace insulation (2" blueboard) (per sq ft)(100%)	100.00	0	20	0.03	0.6	0		FI	I		1				R10
5346	Crawlspace insulation (2" blueboard) (per sq ft)(80%)	100.00	0	20	0.03	0.6	0		FI	I		1				R10
5347	Crawlspace insulation (2" blueboard) (per sq ft)(20%)	100.00	0	20	0.03	0.6	0		FI	I		1				R10
5350		100.00	0	0	0	0	0	0								
5351	Floor joist insulation (basement/crawlspace)(per	100.00	0	0	0.03	0	0	0	FI	I	C					R19
5352	Floor joist insulation (basement/crawlspace)(per lb)(80%)	100.00	0	0	0.03	0	0	0	FI	I	C					R19
5353	Floor joist insulation (basement/crawlspace)(per lb)(20%)	100.00	0	0	0.03	0	0	0	FI	I	C					R19
5355	Floor joist insulation(basement/crawlspace)(per sq	100.00	0	0	0.03	0	0	0	FI	I	F					R19
5356	Floor joist insulation (basement/crawlspace)(per sq	100.00	0	0	0.03	0	0	0	FI	I	F					R19
5357	Floor joist insulation (basement/crawlspace)(per sq	100.00	0	0	0.03	0	0	0	FI	I	F					R19
5360	Vapor barrier (plastic) (per sq ft)	100.00	0	20	0.007	0.15	0.04	0	II	I						
5370	Lath (per piece)	100.00	0	20	0.03	0.6	0.21	0	II	I						
5380	Labor only - extra work - crawlspace insulation (max. 1	100.00	0	20	1	20			FI	I						
5390		100.00	0	20	0	0	0	0		I						

SEQ	Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	ReIn	Rval
5400	Duct Insulation (per ft)	I00.00	0	20	0.03	0.6	0	0	DI	I	F					
5410		I00.00	0	20	0	0	0	0		I						
5420		I00.00	0	20	0	0	0	0		I						
6010	Weatherstrip without carrier	A00.00	0	20	0.5	10	3.66	0	B	A						
6020	Weatherstrip with a carrier	A00.00	0	20	0.5	10	10.14	0	B	A						
6030	Foam w/s	A00.00	0	20	0.25	5	5.18	0	B	A						
6040	Sweep	A00.00	0	20	0.25	5	1.74	0	B	A						
6050	Sweep - triple	A00.00	0	20	0.25	5	1.74	0	B	A						
6060	Sweep - brush	A00.00	0	20	0.25	5	1.74	0	B	A						
6070	Threshold - low	A00.00	0	20	0.75	15	16.2	0	B	A						
6080	Threshold - high with insert	A00.00	0	20	0.75	15	17.28	0	B	A						
6090	Threshold - bumper	A00.00	0	20	0.75	15	0	0	B	A						
6095	Shu	A00.00	0	0	0	0	0	0	B	A						
6100	A/C foam w/s	A00.00	0	20	0.125	2.5	1.26	0	B	A						
6110	Sash locks	A00.00	0	20	0.19	3.8	1.5	0	B	A						
6120	Caulk - latex	A00.00	0	20	0.25	5	2.58	0	B	A						
6130	Caulk - silicone	A00.00	0	20	0.25	5	3.96	0	B	A						
6140	Caulk - hi-temp	A00.00	0	20	0.25	5	4.98	0	B	A						
6150	Non-expanding foam (6 ounce can)	A00.00	0	20	0.25	5	2.62	0	B	A						
6160	Non-expanding foam (20 ounce can)	A00.00	0	20	0.5	10	0	0	B	A						
6170	Patching plaster (drywall compound) (per lb.)	R00.00	0	20	0.065	1.3	0.3	0	R	R						
6180	Mud\taping (per gal.)	R00.00	0	20	1.5	30	4.2	0	R	R						
6190	Ceiling tile (per sq. ft.)	R00.00	0	20	0.125	2.5	3.6	0	R	R						
6200	Sheetrock 1/2" (per sq. ft.)	R00.00	0	20	0.03	0.6	0.22	0	R	R						
6210	Sheetrock 5/8" (per sq. ft.)	R00.00	0	20	0.03	0.6	0.23	0	R	R						
6220	Celotex 1/2" (per sq. ft.)	A00.00	0	20	0.03	0.6	0.32	0	A	A						
6230	Celotex 3/4" (per sq. ft.)	A00.00	0	20	0.03	0.6	0.37	0	A	A						
6240	Celotex (1" underbelly) per sq. ft.	I00.00	0	20	0.05	1	0.49	0	II	I						
6250	Mortar mix (per 60 lb. bag)	R00.00	0	20	1	20	4.86	0	R	R						

SEQ	Work Item	CAT	QTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	Reln	Rval
6260	Blocks (per block) cement	R00.00	0	20	0.062	1.24	1.24	0	R		R					
6270	Miscellaneous Infiltration Costs	A00.00	0	20	0	0	0	0	A		A					
6280	Miscellaneous Infiltration Costs	A00.00	0	20	0	0	0	0	B		A					
6290		A00.00	0	20	0	0	0	0	B		A					
6300	Miscellaneous Repairs	R00.00	0	20	0	0	0	0			R					
6310	Miscellaneous Repairs - Utility Funds (max \$300)	R00.00	0	20	0	0	0	0			R					
6315		R00.00	0	0	0	0	0	0								
6410	Sash (material only per united inch)	R00.00	0	20	0	0	0.1	0			R					
6420	Sash (per sash labor)	R00.00	0	20	1	20	0	0			R					
6430	Window sill (per ft)	R00.00	0	20	0.5	10	4				R					
6440	Glaze windows (per pint)	R00.00	0	20	0.57	11.4	2.37				R					
6450	Sash channels (per window)	R00.00	0	20	0.5	10	7.08	0			R					
6460	Plexi glass (per sq inch)	R00.00	0	20	0.000	0.01	2.27	0			R					
6470	Glass (small) 0-144 sq inch	R00.00	0	20	0.25	5	1.44	0			R					
6480	Glass (medium) 145-576 sq inch	R00.00	0	20	0.38	7.6	7.21	0			R					
6490	Glass (large) 577-1296 sq inch	R00.00	0	20	0.5	10	18.72	0			R					
6500	Glass (exlarge) 1297+ sq inch	R00.00	0	20	0.75	15	25.94	0			R					
6505	Trim interior door - pressure balancing	H00.00	0	0	0.5	0	0	0			H					
6510	Door - solid core	R00.00	0	20	4	80	108	0			R					
6520	Door - hollow core	R00.00	0	20	4	80	78	0			R					
6530	Door - steel pre hung	R00.00	0	20	4	80	132	0			R					
6540	Door - carsiding (36"x80") hinges/lockset	R00.00	0	20	4	80	68.75	0			R					
6550	Car siding (per ft)	R00.00	0	20	0.03	0.6	0.64				R					
6560	Door sill	R00.00	0	20	0.5	10	10.32				R					
6570	Exterior door jam w/sill	R00.00	0	20	2	40	66				R					
6580	Door light	R00.00	0	20	0.375	7.5	10.44	0			R					
6590	Peep hole	R00.00	0	20	0.25	5	3.42	0			R					
6600	Butt hinges (each) 4" hinges	R00.00	0	20	0.19	3.8	0.6	0			R					
6610	T-hinges 4"	R00.00	0	20	0.19	3.8	1.04				R					

SEQ	Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	Reln	RVal
6620	T-hinges 2"	R00.00	0	20	0.19	3.8	1.04	0								R
6630	Striker plate (standard)	R00.00	0	20	0.5	10	2.04									R
6640	Barrell bolt	R00.00	0	20	0.25	5	1.74	0								R
6650	L-bracket	R00.00	0	20	0.19	3.8	2.11									R
6660	Turn buckle	R00.00	0	20	0.19	3.8	3.27									R
6670	Turn button	R00.00	0	20	0.19	3.8	0.52									R
6680	Snap fastener	R00.00	0	20	0.19	3.8										R
6690	Hook and eye	R00.00	0	20	0.19	3.8	0.81									R
6700	Door pull	R00.00	0	20	0.19	3.8	2.86									R
6710	Lockset - keyed	R00.00	0	20	0.375	7.5	17.25	0								R
6720	Lockset - passage	R00.00	0	20	0.375	7.5	9.2	0								R
6730	Modernization kit	R00.00	0	20	0.375	7.5	26.82	0								R
6740	Consumables	M00.00	0	0					C							M
6741		M00.00	0	0	0	0	0	0								
6742		M00.00	0	0	0	0	0	0								
6750	Plumbing Repair (Gen. H&S Repair)(\$800 max)	R00.00	0	20	0	0	0	0								R
6751	Sump Pump (Gen. H&S Repair)(\$800 max)	R00.00	0	0	0	0	0	0								R
6752	Dehumidifier (Gen. H&S Repair)(\$800 max)	R00.00	0	0	0	0	0	0								R
6753	Guttering (Gen. H&S Repair)(\$800 max)	R00.00	0	0	0	0	0	0								R
6754	Grading (Gen. H&S Repair)(\$800 max)	R00.00	0	0	0	0	0	0								R
6755	Electrical Repair (Gen. H&S Repair)(\$800 max)	R00.00	0	0	0	0	0	0								R
6756	Moisture/Mold Cleanup (Gen. H&S Repair)(\$800 max)	R00.00	0	0	0	0	0	0								R
6760		R00.00	0	20	0	0	0	0								R
6770		R00.00	0	20	0	0	0	0								R
6780		R00.00	0	20	0	0	0	0								R
6790		R00.00	0	20	0	0	0	0								R
7010	Lumber 1x2 (all lumber per ft)	R00.00	0	20	0.03	0.6	0.13	0								R
7020	Lumber 1x4	R00.00	0	20	0.03	0.6	0.49									R
7030	Lumber 1x6	R00.00	0	20	0.03	0.6	0.76									R

SEQ Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	ReIn	RVal
7040 Lumber 1x8	R00.00	0	20	0.03	0.6	1.08	0								R
7050 Lumber 1x10	R00.00	0	20	0.03	0.6	1.47	0								R
7060 Lumber 1x12	R00.00	0	20	0.03	0.6	1.93	0								R
7070 Lumber 2x2	R00.00	0	20	0.03	0.6	0.26									R
7080 Lumber 2x4	R00.00	0	20	0.03	0.6	0.37									R
7090 Lumber 2x6	R00.00	0	20	0.03	0.6	0.61	0								R
7100 Lumber 2x8	R00.00	0	20	0.03	0.6	0.94	0								R
7110 Lumber 2x10	R00.00	0	20	0.03	0.6	1.22	0								R
7120 Lumber 2x12	R00.00	0	20	0.03	0.6	1.66	0								R
7130 Parting stop	R00.00	0	20	0.03	0.6	0.38	0								R
7140 Door/window stop	R00.00	0	20	0.03	0.6	0.31	0								R
7150 Door/window casing	R00.00	0	20	0.03	0.6	0.49	0								R
7160 Window trim (5/4 board) per ft	R00.00	0	20	0.03	0.6										R
7170 Brick moulding (per ft)	R00.00	0	20	0.03	0.6	1.24									R
7180 Plywood 1/2" (per sq ft) - treated cdx	R00.00	0	20	0.03	0.6	0.59	0								R
7190 Plywood 3/4" (per sq ft) - treated cdx	R00.00	0	20	0.03	0.6	0.9	0								R
7200 Plywood 3/4" ac (per sq ft)	R00.00	0	20	0.03	0.6	0.9									R
7210 Blue board 2" (per sq ft)	R00.00	0	20	0.03	0.6	0.75	0								R
7220 Styrofoam board 3/4" (per sq ft)	R00.00	0	20	0.03	0.6	0.3	0								R
7230 Masonite (per lin ft)	R00.00	0	20	0.03	0.6	0.77	0								R
7240 Shims (10 per unit)	R00.00	0	20	0.062	1.25	2.3									R
7250 Siding (per lin ft)	R00.00	0	20	0.03	0.6	0.77	0								R
7260 Siding corners (each)	R00.00	0	20	0.03	0.6	0.6	0								R
7270 Roll roofing (per roll)	R00.00	0	20	1.5	30	17.64	0								R
7280 Shingles (per sq)	R00.00	0	20	2	40	41.42	0								R
7290 Tar (per gal)	R00.00	0	20	0.25	5	6.9	0								R
7300 Silver seal (per gal)	R00.00	0	20	0.25	5	17.83	0								R
7310 Metal flashing (per lin ft) for roofing only	R00.00	0	20	0.05	1	0.61	0								R
7320 S type fuse (15 amp) or (20 amp)	H00.00	0	20	0.03	0.6	0.93	0	FUS							H

SEQ	Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	Reln	RVal
7330	Adapter for S type fuse	H00.00	0	20	0.03	0.6	2.3	0	FUS							H
7350		H00.00	0	20	0	0	0	0								H
7360		H00.00	0	20	0	0	0	0								H
7370		H00.00	0	20	0	0	0	0								H
7380		H00.00	0	20	0	0	0	0								H
8010	Air conditioning - none	U10.00	0	0				0	N							U
8020	Air conditioning - central	U10.00	0	0				0	C							U
8030	Air conditioning - room	U10.00	0	0				0	R							U
8040	Meter refrigerator 1, no action	U20.00	0	0	0	0	0	0								U
8041	Meter refrigerator 2, no action	U20.00	0	0	0	0	0	0								U
8042	Meter refrigerator 3, no action	U20.00	0	0	0	0	0	0								U
8043	Meter refrigerator 4, no action	U20.00	0	0	0	0	0	0								U
8044	Meter refrigerator 5, no action	U20.00	0	0	0	0	0	0								U
8050	Remove refrigerator 1	U21.00	0	0	0	0	0	0								U
8051	Remove refrigerator 2	U21.00	0	0	0	0	0	0								U
8052	Remove refrigerator 3	U21.00	0	0	0	0	0	0								U
8053	Remove refrigerator 4	U21.00	0	0	0	0	0	0								U
8054	Remove refrigerator 5	U21.00	0	0	0	0	0	0								U
8060	Exchange refrigerator 1	U22.00	0	0	0	0	0	0								U
8061	Exchange refrigerator 2	U22.00	0	0	0	0	0	0								U
8062	Exchange refrigerator 3	U22.00	0	0	0	0	0	0								U
8063	Exchange refrigerator 4	U22.00	0	0	0	0	0	0								U
8064	Exchange refrigerator 5	U22.00	0	0	0	0	0	0								U
8070	Meter freezer 1, no action	U23.00	0	0	0	0	0	0								U
8071	Meter freezer 2, no action	U23.00	0	0	0	0	0	0								U
8072	Meter freezer 3, no action	U23.00	0	0	0	0	0	0								U
8073	Meter freezer 4, no action	U23.00	0	0	0	0	0	0								U
8074	Meter freezer 5, no action	U23.00	0	0	0	0	0	0								U
8080	Remove freezer 1	U24.00	0	0	0	0	0	0								U

SEQ	Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	Reln	RVal
8081	Remove freezer 2	U24.00	0	0	0	0	0	0								U
8082	Remove freezer 3	U24.00	0	0	0	0	0	0								U
8083	Remove freezer 4	U24.00	0	0	0	0	0	0								U
8084	Remove freezer 5	U24.00	0	0	0	0	0	0								U
8090	Exchange freezer 1	U25.00	0	0	0	0	0	0								U
8091	Exchange freezer 2	U25.00	0	0	0	0	0	0								U
8092	Exchange freezer 3	U25.00	0	0	0	0	0	0								U
8093	Exchange freezer 4	U25.00	0	0	0	0	0	0								U
8094	Exchange freezer 5	U25.00	0	0	0	0	0	0								U
8110		U01.00	0	20	0	0		0								U
8120		U01.00	0	20	0	0										U
8130		U01.00	0	20	0	0										U
8140	Compact fluorescent 25 W	U03.00	0	20	0	0	13.25		T25							U
8150	Compact fluorescent 23 W	U03.00	0	20	0	0	13.25		T23							U
8160	Compact fluorescent 20 W	U03.00	0	20	0	0	14.95		0 T20							U
8170	Compact fluorescent 15W	U03.00	0	20	0	0	0		0 T15							U
8180	Compact fluorescent 11W	U03.00	0	20	0	0			T11							U
8185	Compact fluorescent 5W	U03.00	0	20	0	0			T5							U
8190	Circleline fluorescent bulb	U03.00	0	20	0	0	0	0	C30							U
8200		U03.00	0	20	0	0	0	0								U
8210	Water bed insulation pad	U12.00	0	20	1	20	13.5		0 K,Q,							U
8320	Showerheads	U06.00	0	20	0	0	0	0	H							U
8330	Faucet aerators	U04.00	0	20	0	0	0.35		0 N30							U
8340	Pipe wrap	U05.00	0	20	0	0	0.36		0 N30							U
8350	Water heater jacket	U07.00	0	20	0	0	8.15		0 N30							U
8360	Water heater replacement - natural gas	H00.00	0	20	0	0	0									H
8365	Water heater replacement - electric	H00.00	0	0	0	0	0		0							H
8370	Water heater replacement - propane	H00.00	0	20	0	0	0									H
8375	Water heater replacement - utility funds	U00.00	0	0	0	0	0	0								U

SEQ	Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	Reln	RVal
8380	Water heater overflow pipe	H00.00	0	20	0	0	0		WR							H
8390	Water heater replacement - power vented - natural gas	H00.00	0	20	0	0	0									H
8400	Water heater replacement - power vented - L. P. gas	H00.00	0	20	0	0	0									H
8410	Water heater repair	H00.00	0	20	0	0	0	0	WR							H
8420		H00.00	0	20	0	0	0	0								H
8430		H00.00	0	20	0	0	0	0								H
8440	3" elbows	H00.00	0	20	0	0	0	0	V							H
8450	4" elbows	H00.00	0	20	0	0	0	0	V							H
8610	Dryer vent (exterior kit)	H00.00	0	20	1	20	10.35		VD							H
8620	Bathroom vent (exterior kit)	H00.00	0	20	1	20	10.35		VB							H
8630	Kitchen vent (exterior kit)	H00.00	0	20	1	20	10.35		VK							H
8640	Dryer vent (duct per ft)	H00.00	0	20	0.1	2	1.24		VD							H
8650	Bathroom vent (duct per ft)	H00.00	0	20	0.1	2	1.24		VB							H
8660	Kitchen vent (duct per ft)	H00.00	0	20	0.1	2	1.24		VK							H
8670	Duct sealing (per foot)	H00.00	0	20	0.1	2			D							H
8680	Carbon monoxide detector	H00.00	0	20	0.125	2.5	50		C							H
8690	Smoke detector	H00.00	0	20	0.125	2.5	13.8		B							H
8700	Safety check	H00.00	0	20				0	S							H
8710	Final safety check	H00.00	0	20				0	S							H
8720	Miscellaneous health and safety repair	H00.00	0	20				0	S							H
8730	Furnace repair	H00.00	0	20				0	S							H
8740	Exhaust Fan	H00.00	0	20	3	60			S							H
8750	Air-to-Air Exchanger System	H00.00	0	20	0	0	0	0								H
8760		H00.00	0	20	0	0	0	0								H
8770		H00.00	0	0	0	0	0	0								H
8780	Furnace Venting	H00.00	0	0	0	0	0	0								H
8781	Furnace venting - utility funds (max \$150)	U00.00	0	0	0	0	0	0	F							
8790	Water Heater Venting	H00.00	0	0	0	0	0	0								H
8791	Water heater venting - utility funds (max \$150)	U00.00	0	0	0	0	0	0	F							

SEQ	Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	ReIn	RVal
9010	Furnace tune and clean	F10.00	0	0			0	0		F						
9020	Furnace tune and clean (space heater)	F10.00	0	0						F						
9030	Trip charge	F10.00	0	0						F						
9040	Trip charge	F10.00	0	0						F						
9050	Trip charge	F10.00	0	0						F						
9060	Trip charge	F10.00	0	0						F						
9070	Trip charge	F10.00	0	0						F						
9080	Furnace replacement - ECIP	F20.00	0	0			1000			F						
9110	Furnace replacement - 80%	H00.00	0	0			500			H						
9120	Furnace replacement - 92%	H00.00	0	0						H						
9130	Furnace replacement - electric	H00.00	0	0						F						
9140	Boiler replacement	H00.00	0	0						F						
9150	Space heater replacement	H00.00	0	0	0	0	0	0	0	H						
9160	Heat pump replacement	H00.00	0	0						F						
9170		H00.00	0	0					S	F						
9180		H00.00	0	0					S	F						
9190		H00.00	0	0					S	F						
9200		F20.00	0	0	0	0	0	0	0	F						
9210		F20.00	0	0	0	0	0	0	0	F						
9220	Programmable thermostat - Energy Star - utility funds	F20.00	0	0	0	0	0	0	0	F						
9230	Furnace Replacement - Utility Funds	F20.00	0	0	0	0	0	0	0	F						
9300	Air Conditioner A-Coil Clean	C00.00	0	0	0	0	0	0	0	C						
9310		C00.00	0	0	0	0	0	0	0							
9320		C00.00	0	0	0	0	0	0	0							
10010	Attic insulation- mobile home (sq ft) (100%)	I00.00	0	20	0.03	0.6	0	0	0	CI	I	F				R11
10020	Attic insulation - mobile home (sq ft) (80%)	I00.00	0	20	0.03	0.6	0	0	0	CI	I	F				R11
10030	Attic insulation - mobile home (sq ft) (20%)	I00.00	0	20	0.03	0.6	0	0	0	CI	I	F				R11
10040		I00.00	0	20	0	0	0	0	0	CI	I	F				R11
10050		I00.00	0	20	0	0	0	0	0	CI	I	F				R11

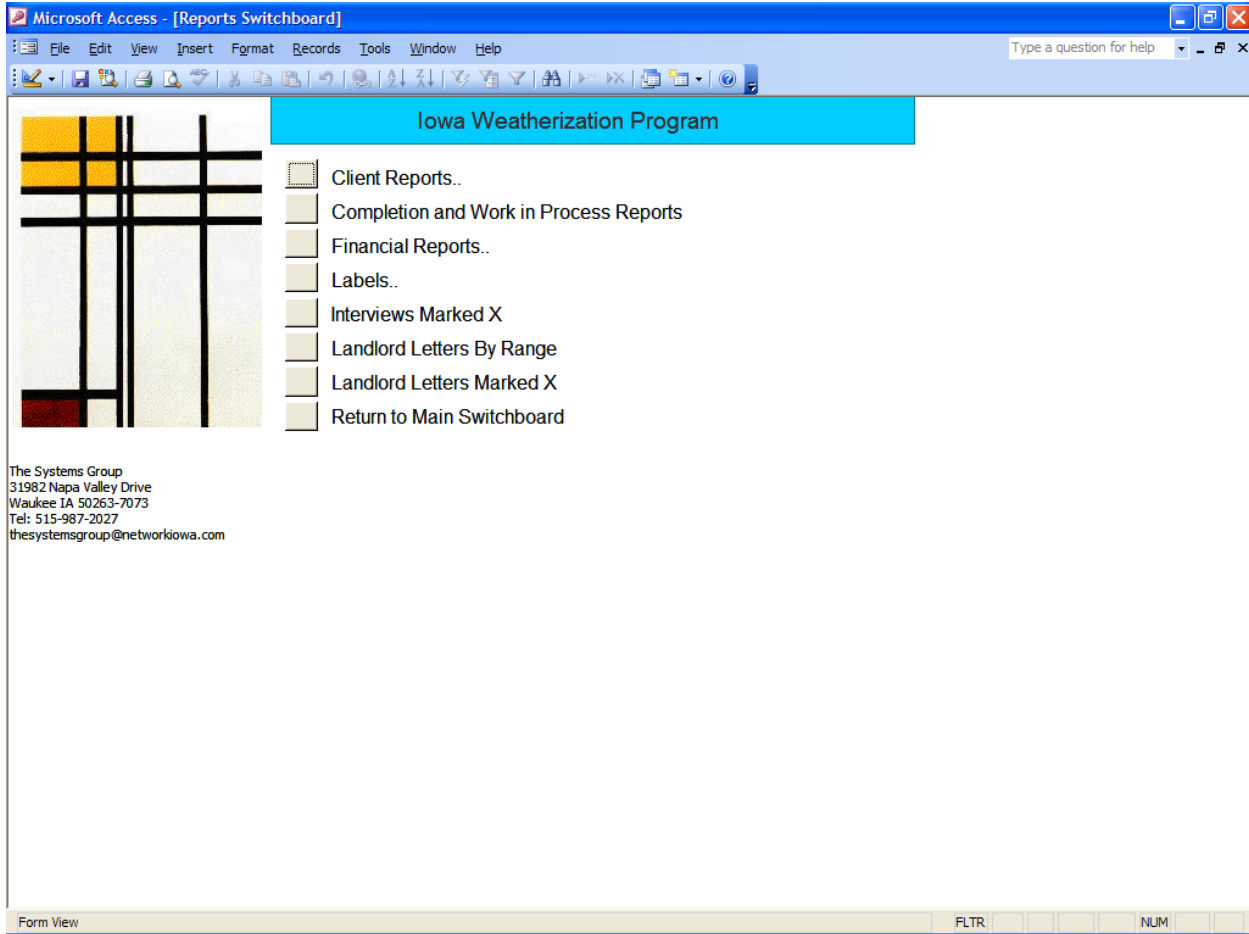
SEQ Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	Reln	RVal
10060	100.00	0	20	0	0	0	0	CI	I	F					R11
10070	100.00	0	20	0	0	0	0	CI	I	F					R11
10080	100.00	0	20	0	0	0	0	CI	I	F					R11
10110 Attic insulation- mobile home (sq ft) (100%)	100.00	0	20	0.03	0.6	0	0	CI	I	F					R19
10120 Attic insulation - mobile home (sq ft) (80%)	100.00	0	20	0.03	0.6	0	0	CI	I	F					R19
10130 Attic insulation - mobile home (sq ft) (20%)	100.00	0	20	0.03	0.6	0	0	CI	I	F					R19
10140	100.00	0	20	0	0	0	0	CI	I	F					R19
10150	100.00	0	20	0	0	0	0	CI	I	F					R19
10160	100.00	0	20	0	0	0	0	CI	I	F					R19
10170	100.00	0	20	0	0	0	0	CI	I	F					R19
10180	100.00	0	20	0	0	0	0	CI	I	F					R19
10210 Attic insulation- mobile home (sq ft) (100%)	100.00	0	20	0.03	0.6	0	0	CI	I	F					R30
10220 Attic insulation - mobile home (sq ft) (80%)	100.00	0	20	0.03	0.6	0	0	CI	I	F					R30
10230 Attic insulation - mobile home (sq ft) (20%)	100.00	0	20	0.03	0.6	0	0	CI	I	F					R30
10240	100.00	0	20	0	0	0	0	CI	I	F					R30
10250	100.00	0	20	0	0	0	0	CI	I	F					R30
10260	100.00	0	20	0	0	0	0	CI	I	F					R30
10270	100.00	0	20	0	0	0	0	CI	I	F					R30
10280	100.00	0	20	0	0	0	0	CI	I	F					R30
10310 Attic insulation- mobile home (sq ft) (100%)	100.00	0	20	0.03	0.6	0	0	CI	I	F					R38
10320 Attic insulation - mobile home (sq ft) (80%)	100.00	0	20	0.03	0.6	0	0	CI	I	F					R38
10330 Attic insulation - mobile home (sq ft) (20%)	100.00	0	20	0.03	0.6	0	0	CI	I	F					R38
10340	100.00	0	20	0	0	0	0	CI	I	F					R38
10350	100.00	0	20	0	0	0	0	CI	I	F					R38
10360	100.00	0	20	0	0	0	0	CI	I	F					R38
10370	100.00	0	20	0	0	0	0	CI	I	F					R38
10380	100.00	0	20	0	0	0	0	CI	I	F					R38
10410 Sidewall insulation - mobile home (100%)	100.00	0	20	0.03	0.6	0	0	WI	I	F					R11
10420 Sidewall insulation - mobile home (80%)	100.00	0	20	0.03	0.6	0	0	WI	I	F					R11

SEQ	Work Item	CAT	OQTY	HRS	RHRS	RLAB	RMAT	RSUP	Mea	Cost	Ctg	Insu	Use	T	Reln	RVal
10430	Sidewall insulation - mobile home (20%)	I00.00	0	20	0.03	0.6	0	0	WI	I	F					R11
10440		I00.00	0	20	0	0	0	0	WI	I	F					R11
10450		I00.00	0	20	0	0	0	0	WI	I	F					R11
10460		I00.00	0	20	0	0	0	0	WI	I	F					R11
10470		I00.00	0	20	0	0	0	0	WI	I	F					R11
10480		I00.00	0	20	0	0	0	0	WI	I	F					R11
10510	Underbelly insulation - mobile home (100%)	I00.00	0	20	0.03	0.6	0	0	FI	I	F					
10520	Underbelly insulation - mobile home (80%)	I00.00	0	20	0.03	0.6	0	0	FI	I	F					
10530	Underbelly insulation - mobile home (20%)	I00.00	0	20	0.03	0.6	0	0	FI	I	F					
10540		I00.00	0	20	0	0	0	0	FI	I	F					
10550		I00.00	0	20	0	0	0	0	FI	I	F					
10560		I00.00	0	20	0	0	0	0	FI	I	F					
10570		I00.00	0	20	0	0	0	0	FI	I	F					
10580		I00.00	0	20	0	0	0	0	FI	I	F					
10710	Celotex 1" (underbelly) (sq ft)	I00.00	0	20	0.03	0.6	0	0	II	I						
10720	Seal underbelly	I00.00	0	20	0	0	0	0	II	I						
10730	Silver seal (per gal)	R00.00	0	20	0.25	5	0	0			R					
10740	Mobile home door	H00.00	0	20	4	80	103.5	0			H					
10750	Mobile home window (per inside & outside unit)	R00.00	0	20	1.5	30	0	0			R					

From: **MAIN SWITCHBOARD**

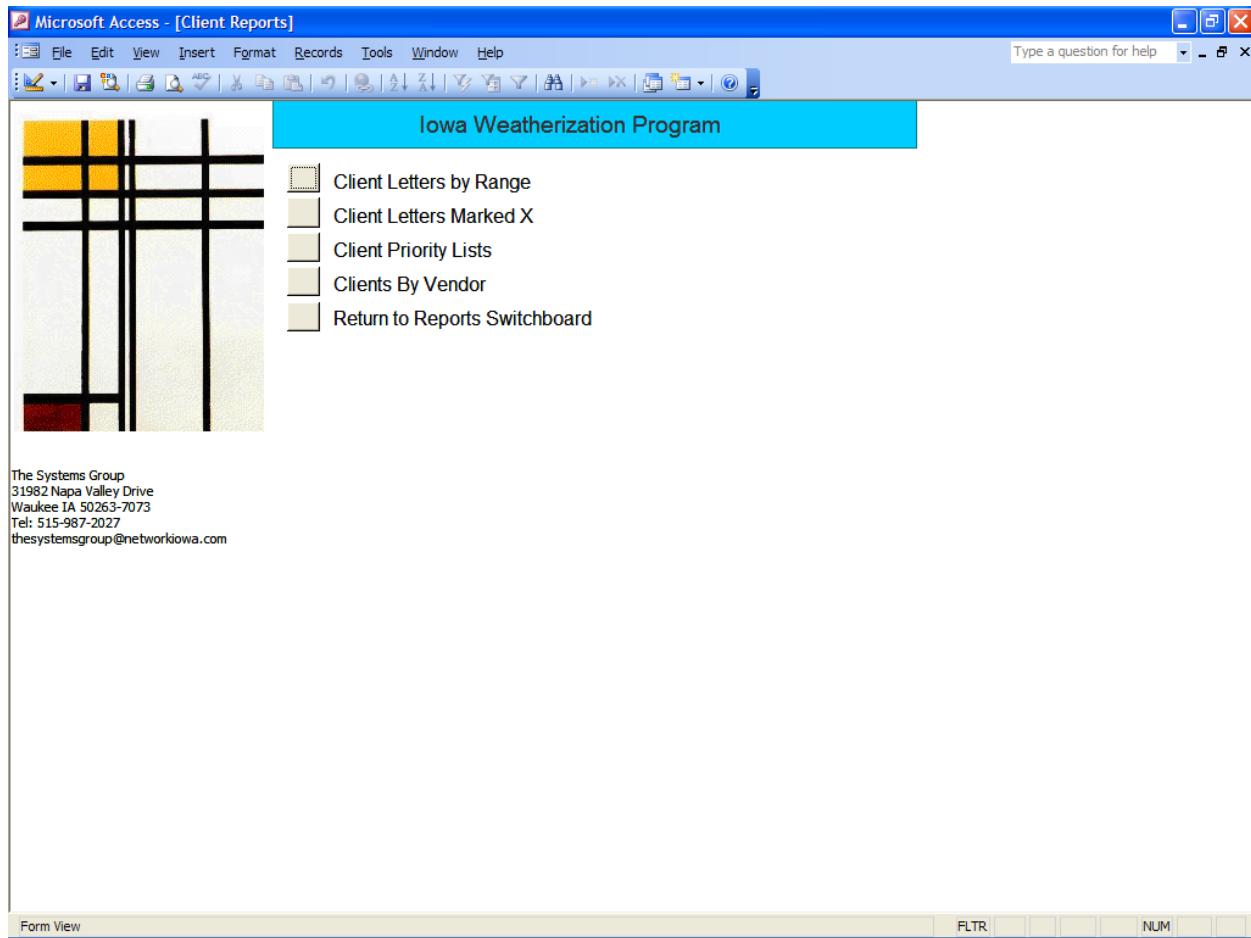
REPORTS/LETTERS...

This section produces several different reports and letters. Select the report/letter by clicking once on the adjacent button.



Client Reports

This section includes criteria for client letter mail merge functions and the client priority list.



1. Client Letter by Range

Select from a group of variable: County code, priority number and/or zip code.

The screenshot shows a Microsoft Access form window titled "Client Letters by Range : Form". The form has a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar. The main area is titled "Client Letters by Range" and contains three sections for range selection:

- County Code Range:** Includes text boxes for "From County Code:" (containing "00") and "To County Code:" (containing "99").
- Priority Number Range:** Includes text boxes for "From Priority Number:" (containing "0000") and "To Priority Number:" (containing "9999").
- Zip Code Range:** Includes text boxes for "From Zip Code:" (containing "00000") and "To Zip Code:" (containing "99999").

On the right side of the form, there are three buttons:

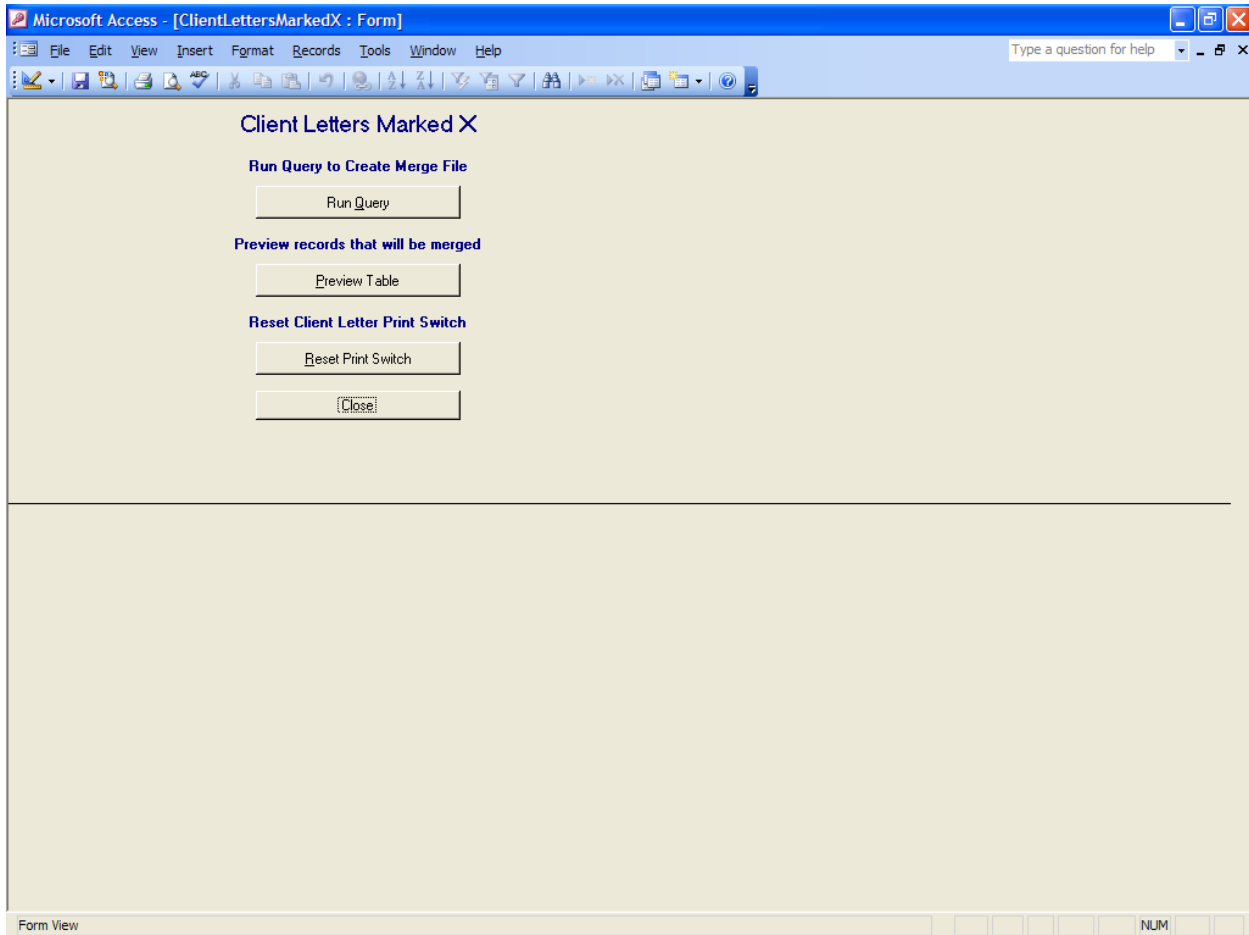
- "Run Query to Create Merge File" with a sub-button labeled "(Run Query)".
- "Preview Records that will be merged" with a sub-button labeled "Preview Table".
- A "Close" button.

The status bar at the bottom left shows "Form View" and the bottom right shows "NUM".

After selecting criteria, click on Run Query. Click on Preview Table to view the list of client names selected in the range criteria. If the names are correct, open MS Word to run mail merge and create client letters.

2. Client Letters Marked by X

To use this feature, clients are selected in the Client Data screen by marking individual files with an X in the proper field.



The screenshot shows a Microsoft Access window titled "Microsoft Access - [ClientLettersMarkedX : Form]". The window has a menu bar with "File", "Edit", "View", "Insert", "Format", "Records", "Tools", "Window", and "Help". Below the menu bar is a toolbar with various icons. The main area of the form is titled "Client Letters Marked X" and contains the following sections and buttons:

- Run Query to Create Merge File**: A button labeled "Run Query".
- Preview records that will be merged**: A button labeled "Preview Table".
- Reset Client Letter Print Switch**: A button labeled "Reset Print Switch".
- A button labeled "Close".

At the bottom of the window, the status bar shows "Form View" on the left and "NUM" on the right.

After selecting criteria, click on Run Query. Click on Preview Table to view the list of client names selected in the range criteria. If the names are correct, open MS Word to run mail merge and create client letters.

3. Client Priority List

Client priority lists sorted by priority number must be maintained by the agency. Lists should be one at a time by county in order to serve the highest priority houses in each county. Other criteria may be used to produce lists for specific fuel vendors, but the county lists must be used for selecting houses for weatherization. After setting criteria, select the desired sort option (normally sorted by priority number).

The Data Range must always be set to the most recent LHEAP program dates in order to only print current applicants in the priority list.

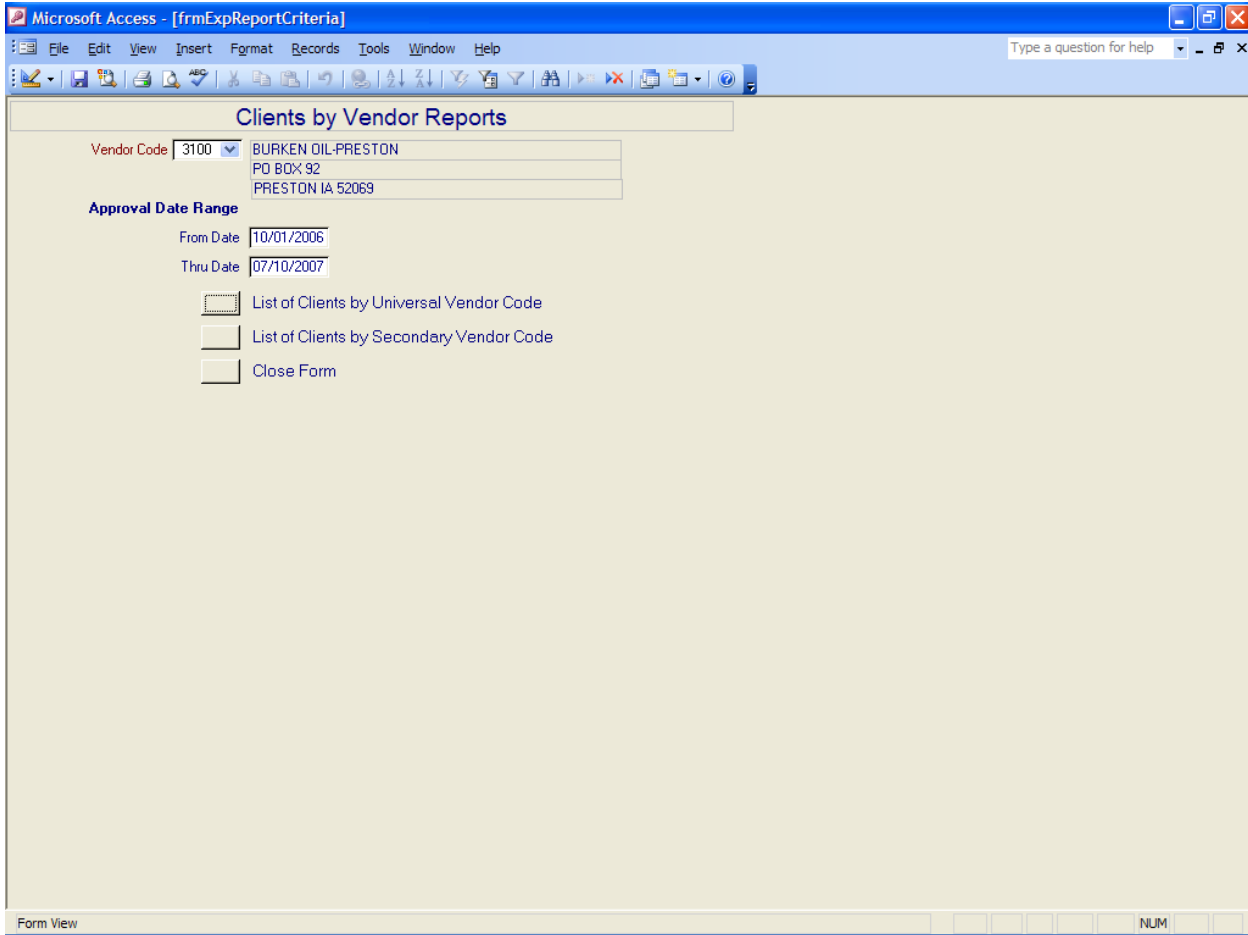
The screenshot shows a Microsoft Access window titled "ClientPriorityLists : Form". The form is titled "Client Priority Lists" and contains several sections for defining search criteria:

- County Code Range:** From County Code: 00, To County Code: 99
- Priority Number Range:** From Priority Number: 0000, To Priority Number: 9999
- Vendor Number Range:** From Vendor Number: 0000, To Vendor Number: 9999
- Date Range:** From Date: 01/01/1900, Thru Date: 12/31/2999
- Sort Options:** Buttons for "Sort by Name", "Sort by Priority Number", and "Close".

The form is displayed in "Form View" and includes a status bar at the bottom with the label "NUM".

4. Clients by Vendor

These reports are used in order to collect fuel data from deliverable, municipal and cooperative (rural electric) vendors.



FIELD TITLE	DEFINITION/DESCRIPTION
Vendor Code	Enter a utility vendor code
Approval Date Range	
From Date	Enter the most recent LHEAP program beginning date
Through Date	Enter current date
List of Clients by Universal Vendor	Click this button to produce a list of heating customers/clients for the vendor code selected above
List of Client by Secondary Vendor	Click this button to produce a list of electric customers/clients for the vendor code selected above. This program does not require electric usage to determine priority points, but electric usage data will affect the points.

Completions and Work in Process Reports

This report is a tool agencies may use to summarize total expenses by house, by program. Select Completions Report All Programs to see each completion summarized by program and labor type or select Completions Report for One Program to see completions for a specific program.

FIELD TITLE	DEFINITION/DESCRIPTION
Agency Number	Select correct agency code
From Date	Select beginning date for current month
To Date	Select ending date for current month
Program	If selecting reports for one program, enter correct program

Financial Reports

This section contains the forms for the monthly reports including Purchase Order, Demographics, Detail Reports, Summary Reports and Utility Reports. It also allows access to all saved Summary Reports.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Financial Reports]". The window has a menu bar with "File", "Edit", "View", "Insert", "Format", "Records", "Tools", "Window", and "Help". A search bar on the right says "Type a question for help". Below the menu bar is a toolbar with various icons. The main content area is titled "Iowa Weatherization Program" in a blue header. To the left of the header is a graphic with a grid of black lines and colored squares (yellow, red, black). To the right of the header is a list of menu items, each with a small square icon:

- Purchase Orders
- Demographic Reports
- Detail Reports
- Summary Reports
- Utility Reports
- Print Saved Reports
- Return to Reports Switchboard

At the bottom left of the window, there is contact information for "The Systems Group":

The Systems Group
31982 Napa Valley Drive
Waukee IA 50263-7073
Tel: 515-987-2027
thesystemsgroup@networkiowa.com

At the bottom of the window, there is a status bar with "Form View" on the left and "FLTR" and "NUM" on the right.

1. Purchase Orders

Purchase orders are also referred to as invoices, vouchers or GAX

Microsoft Access - [frmInvoice]

File Edit View Insert Format Records Tools Window Help

Type a question for help

Purchase Order Notes

InvoiceNumber: 28

InvoiceDate: 03/29/2006

ContractNumber: D0E-07-02C

InvoiceTotal: (\$530,467.00)

ClaimantTitle: Executive Director

SignatureDate: 03/29/2006

AgencyVendorCode: 42089840500

Line No	Fund	Agency	Organization	Object
01	0041	379	21C7	2495
02				

Preview Purchase Order Close

Record: 1 of 1

Form View

FIELD TITLE	DEFINITION/DESCRIPTION
Invoice Number	Invoice number will be assigned by the program
Invoice Date	Fill in the date the purchase order is being created
Contract Number	Contract number for invoice being completed
Invoice Total	Amount of funds requested. Must agree with Line 20 on the summary report
Claimant Title	Name and title of person signing the voucher
Signature Date	Date the voucher is signed
Agency Vendor Code	Select the correct agency vendor code from the drop down menu. This should default to the correct agency once selected. If program changes are made, be sure to confirm the vendor code before creating vouchers

The next two lines provide the information for the bottom of the voucher. Normally only line 1 will be used. Information varies from program to program and changes from year to year. The following is a list of the correct information.

Program	Line No.	Fund	Agency	Organization	Object
DOE	01	0041	379	21xC	2495
HEAP	01	0190	379	23xC	2495
IPL	01	0041	379	IPxx	2495
MEC	01	0041	379	MAxx	2495
Aquila	01	0041	379	AQxx	2495

The x in the Organization code changes to the program year (i.e. DOE-07 program organization code would be 217C or IPL-08 program would be IP08)

After all the data is completed, click on Preview Purchase Order to view the completed form. If the form is correct, click on the print icon. If it is not correct, close the preview and make necessary corrections.

2. Demographic, Detail, Summary and Utility Reports

When any of these reports are selected, the Expenditure Reports Criteria screen is opened. The various types of reports are listed in the Report Heading drop down menu.

The demographic reports are required each month for DOE and HEAP.

There are two demographic reports to select from:

103H	HEAP Demographics Report
103N	DOE Demographics Report

The next two reports MUST be run in this order. Detail Report followed immediately by the Summary Report. If not in this order, the summary report will not work properly. These reports are required for each contract, each month even if no completions for the month.

There are three detail reports to select from:

102H	HEAP Expenditure Detail Report
102N	DOE Expenditure Detail Report
102U	Utilities Expenditure Detail Report

There are three summary reports to select from:

101	DOE Expenditure Summary Report
101H	HEAP Expenditure Summary Report
101U	Utilities Expenditure Summary Report

There are five utility reports available. These reports are used by the State Weatherization Office to report to the Utility Companies. The agencies do not use these report, but may view them if desired.

111	Utility Summary Report
111P	Utility Agency Summary Report – Primary Utility
111S	Utility Agency Summary Report – Secondary Utility
112P	Utility Agency Detail Report – Primary Utility
112S	Utility Agency Detail Report – Secondary Utility

Expenditure Reports Criteria

Report Heading	101H	HEAP Expenditure Summary Report (101H)
Agency Number	05F	MICA
Universal Vendor Code	1213	INTERSTATE POWER AND LIGHT
Contract	DOE-07-05F	
YTD Begin Date	01/01/2007	
From Date	06/01/2007	
To Date	06/30/2007	
Program	D07	
Max Health and Safety	\$721.00	
Max House Cost	\$2,885.00	

Form View NUM

FIELD TITLE	DEFINITION/DESCRIPTION
Report Heading	Select the correct report from the drop down menu
Agency Number	Fill in correct agency identifier. The program should default to the correct identifier once selected unless program changes are made. Agencies must be sure to check this field.
Universal Vendor Code	To select the correct utility vendor when creating utility reports
Contract	Will be filled in by the program when the Verify Criteria button is clicked
YTD Begin Date	Fill in the program year beginning date
From Date	Fill in the beginning date for this report (usually the first day of the month)
To Date	Fill in the ending date for this report (usually the last day of the month)
Program	Fill in the program for this report (D07, H07 or P07)
Max Health & Safety	The program fills in this figure (it is the average health and safety figure for the year)

Max House Cost

The program fills in this figure (it is the DOE average for the year).
For HEAP or Utility detail reports, the program defaults to \$99,999.

Once the required information is completed:

- click on the Verify Criteria screen to set all defaults and verify the report requested agrees with the program selected
- click on the correct report button at the bottom of the screen

Demographic Reports:

- are produced in a print preview format
- click on the print icon (if corrections are needed, close the report, make corrections and run the report again)

Detail Reports:

- are produced on screen
- check homes listed are correct, click on the Update Values button to total the report
- click on the Print Report button to open the report in print preview format
- click on the print icon to print the report

Summary Reports:

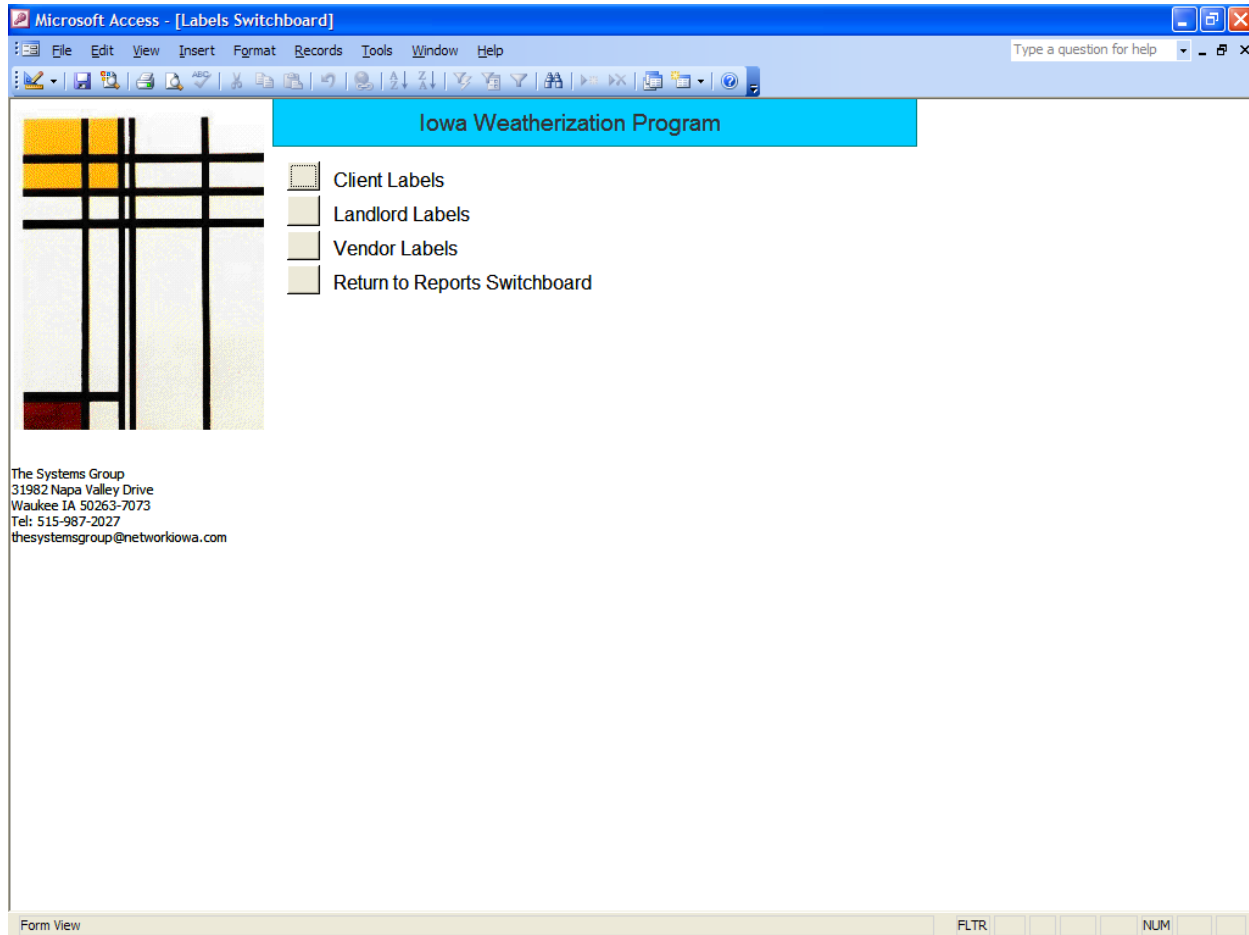
- are produced on screen
- the first month of a new program, fill in the budget column for each line item
- in the HEAP Summary Report, the monthly augment figures from DOE must be completed
- for all program summary reports, line 14, 16, 18 and 19 must be filled in
- click on the Update Values button to finalize the report by bringing forward all the budget and cumulative figures and calculating funds to be requested
- click on the Print Report button to open the report in print preview format
- click on the print icon to print the report
- after the report is printed, close the print preview screen and click on Save Report button to hold budget and cumulative expenses information for future reports

3. **Print Saved Reports**

This section allows the review of all saved Summary Reports. To print a specific report, locate that report and click on Print Report (it will open in print preview format), click on the print icon.

Labels

The Labels section has three parts: Client Labels, Landlord Labels and Vendor Labels. Each of these produces the labels for the records marked.



Select the label type desired by clicking once on the box beside name. Instructions for all three of the label types are the same:

- click on Run Query to open a table with all the selected clients
- review the table to assure the correct clients have been selected then close it
- the program will ask for number of labels to be printed for each client and number of blank labels (if you are not using a full sheet of labels)
- the labels will then appear in print preview format
- click the print icon to print
- click Reset Print Label Switch so no records are selected

Microsoft Access - [LabelsMarkedX : Form]

File Edit View Insert Format Records Tools Window Help

Type a question for help

Print Client Labels Marked X

Run Query to Preview Table

[Run Query]

Select Number of Labels

[Number of Labels]

Reset Print Label Switch

Reset Print Label Switch

Close

Form View NUM

Microsoft Access - [LandlordLabelsMarkedX : Form]

File Edit View Insert Format Records Tools Window Help

Type a question for help

Print Landlord Labels Marked X

Run Query to Preview Table

[Run Query]

Select Number of Labels

Number of Labels

Reset Print Label Switch

Reset Print Label Switch

Close

Record: 1 of 1

Form View NUM

Microsoft Access - [VendorLabelsMarkedX : Form]

File Edit View Insert Format Records Tools Window Help

Type a question for help

Print Vendor Labels Marked X

Run Query to Preview Table

Run Query

Select Number of Labels

Number of Labels

Reset Print Label Switch

Reset Print Label Switch

Close

Record: 1 of 1

Form View

NUM

Interviews Marked By X

This will print all the marked client interviews. This section is most helpful when there are several client interviews to be printed. Single interviews can be printed though the interview screen.

- click on Preview Table button to view the list of clients selected
- click on Preview Report to open a print preview of the interviews selected
- click on the print icon to print
- click on Reset Print Switch to un-select all interviews

The screenshot shows a Microsoft Access window titled "Microsoft Access - [InterviewsMarkedX : Form]". The window has a standard menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar with various icons. The main area of the window displays the "Interviews Marked X" form. The form has a light beige background and contains the following elements:

- Interviews Marked X** (Section Header)
- Preview client records that will be printed** (Section Header)
-
- Preview interviews that will be printed** (Section Header)
-
- Reset Interviews Print Switch** (Section Header)
-
-

At the bottom of the window, the status bar shows "Form View" on the left and "NUM" on the right.

Landlord Letters by Range

To print all the landlord letters and landlord agreements within a specific range (county, priority number or zip code). After selecting criteria, click on Run Query. Review the client list selected by clicking on Preview Table. The landlord letters and landlord agreements are produced in MS Word using the mail merge feature. Click Reset Print Switch so no records are selected

The screenshot shows the Microsoft Access application window titled "Microsoft Access - [LandlordLettersByRange : Form]". The form is titled "Landlord Letters by Range" and is divided into three main sections for inputting ranges:

- County Code Range:** Includes input fields for "From County Code" (00) and "To County Code" (99).
- Priority Number Range:** Includes input fields for "From Priority Number" (0) and "To Priority Number" (9999).
- Zip Code Range:** Includes input fields for "From Zip Code" (00000) and "To Zip Code" (99999).

On the right side of the form, there are three buttons under the heading "Run Query to Create Merge File":

- "Run Query" button
- "Preview Table" button
- "Close" button

Below the input fields, there is a large empty rectangular area. At the bottom of the form, the status bar shows "Form View" on the left and "NUM" on the right.

Landlord Letters Marked by X

To produce landlord letters and landlord agreements for the clients selected in the House Data screen, click on Run Query. Review the client list selected by clicking on Preview Table. The landlord letters and landlord agreements are produced in MS Word using the mail merge feature.

Microsoft Access - [LandlordLettersMarkedX : Form]

File Edit View Insert Format Records Tools Window Help

Type a question for help

Landlord Letters Marked X

Run Query to Create Merge File

Run Query

Preview records that will be merged

Preview Table

Reset Landlord Letter Print Switch

Reset Print Switch

Close

Form View NUM

FORMS AND SAMPLES

SAMPLE – Client Priority List

Microsoft Access - [ClientPriorityList] Type a question for help

Client Priority List Page 1

County	31	DUBUQUE											
Last Name	Primary Address	City		Home Phone	UVC	SVC	CPN	AFN	COM	DOC			
First Name	Secondary Address	St	Zip	Zip4	Work Phone	HGT	HTC	HTS	FUD	FIL	Reason Code	DAT	
Metcalf	1268 Locust St	DUBUQUE			5635811839	1600		1200	2098.0	1134149671			
Tom	1268 Locust St	IA	52001			H	B	N				12/09/2005	
ENGELKEN	25005 NEW VIENNA	EPWORTH			5637443968	3381		2102	1695.4	918240991			
ELMER	25005 NEW VIENNA	IA	52045			H	O	P				10/11/2005	
Havard	1084 W 3rd St	DUBUQUE			5635833794	1600		1200	1525.6	-1370836301			
Lisa	1084 W 3rd St	IA	52001			H	R	N				02/01/2006	
STRANG	109 NE TAYLOR ST	CASCADE			5638523049	2014		2014	1349.2	24-72			
CLARA	109 NE TAYLOR ST	IA	52033			V	R	N				10/10/2005	

07/16/2007 10:37 AM

Page: 1 NUM

SAMPLE – Client List By Vendor

**2102 MAQUOKETA VALLEY REC-ANAMOSA
PO BOX 370
ANAMOSA IA 52205-0351**

Approval Dates from **10/01/2005** thru **10/01/2006**

AFN	Name	Account Listed As	Account Number	Consumption
1036786918	KIM BERWANGER 4929WAKASU LN DUBUQUE IA 52003		3829803	<input type="text"/>
1990266093	DELBERT BISCHOFF 10502 BOB ST BERNARD IA 52032	DEL	3253401	<input type="text"/>
4925	LEONARD BRADY 25890 35TH STREET MAQUOKETA IA 52060	LEONARD	1306801	<input type="text"/>
1101133867	PETER CARLSON 21212 92ND ST. MAQUOKETA IA 52060	KAYLA&PETER CARLSON	4228401	<input type="text"/>
65	EVELYN COOKSLEY 1640 280th Ave EARLVILLE IA 52041		4227801	<input type="text"/>
1078761885	STEVEN CUMMINGS 13829 462ND AVE. BELLEVUE IA 52031		4286401	<input type="text"/>
-1962364639	JACKLYNN DUNFEE 14147 N CASCADE APT 2 DUBUQUE IA 52003		4480201	<input type="text"/>
916758062	NORMAN EDWARDS 9550 150TH ST MAQUOKETA IA 52060	NORMAN	3385001	<input type="text"/>
1621892008	SUSAN EDWARDS 19450 86TH AVE BERNARD IA 52032		3997701	<input type="text"/>
956064618	RICKY ERTMER 11368 ROCK GROVE CT APT 3 DUBUQUE IA 52001		4451501	<input type="text"/>
1006968248	GRANT FAUST 3363 110th COGGON IA 52218		845902	<input type="text"/>
1364328690	DAVID FELDERMAN 3231 233RD AVE MAQUOKETA IA 52060		3760101	<input type="text"/>
1056388403	CASSANDRA HARRIS 15818 FIVE POINTS RD DURANGO IA 52039	MICHAEL HARRIS	3647301	<input type="text"/>

SAMPLE – Completions Report

Microsoft Access - [rptCompletionsSummary]

File Edit View Tools Window Help

Type a question for help

95%

Close Setup

02C HACAP

Completions

From 06/01/2007 to 06/30/2007

FIL	PRG	CRO		CRO 1		CRO 2		CRO 3		LLContrib	Support	H&S	JobTotal	CompletionDate
		Labor	Materials	Labor	Materials	Labor	Materials	Labor	Materials					
02-06-2620-06-O	P12	0.00	0.00	0.00	0.00	1320.00	825.00	0.00	0.00	0.00	252.00	0.00	2397.00	06/30/2007
02-06-2620-06-O	D07	0.00	0.00	150.16	83.32	1940.75	1288.25	700.00	1028.00	0.00	2567.42	4473.51	12231.41	06/30/2007
02-06-2664-07-O	D07	0.00	0.00	90.83	42.53	2740.35	946.75	600.00	944.00	0.00	2157.09	1674.12	9195.67	06/30/2007
02-06-2664-07-O	S12	0.00	0.00	58.44	25.56	527.75	186.90	0.00	0.00	0.00	94.00	0.00	892.65	06/30/2007
02-06-2665-07-O	D07	0.00	0.00	4.79	2.32	2402.12	2240.40	613.00	937.00	0.00	2169.87	1275.00	9644.50	06/30/2007
02-06-2711-07-O	D07	0.00	0.00	90.10	56.02	300.00	195.00	95.00	0.00	0.00	257.64	289.45	1283.21	06/30/2007
02-52-2329-07-O	D07	0.00	0.00	0.00	0.00	1392.00	1027.00	360.00	540.00	0.00	2467.85	1094.00	6880.85	06/30/2007
02-52-2329-07-O	P12	0.00	0.00	0.00	0.00	1897.60	1088.00	0.00	0.00	0.00	351.00	0.00	3336.60	06/30/2007
02-52-2329-07-O	S12	0.00	0.00	0.00	0.00	474.40	272.00	0.00	0.00	0.00	88.00	0.00	834.40	06/30/2007
02-52-2562-07-O	D07	0.00	0.00	69.39	42.60	750.00	1245.00	74.00	0.00	0.00	1528.10	1521.96	5231.05	06/30/2007
02-52-2562-07-O	P19	0.00	0.00	0.00	0.00	1560.00	625.00	0.00	0.00	0.00	257.00	0.00	2442.00	06/30/2007
02-52-2566-07-O	D07	0.00	0.00	118.39	68.42	720.00	870.00	113.00	167.00	0.00	1279.88	1779.55	5116.24	06/30/2007
02-52-2566-07-O	P19	0.00	0.00	0.00	0.00	1050.00	550.00	0.00	0.00	0.00	188.00	0.00	1788.00	06/30/2007
02-53-2604-06-O	H07	0.00	0.00	0.00	0.00	0.00	495.00	0.00	0.00	0.00	0.00	0.00	495.00	06/30/2007
02-53-2604-06-O	D07	0.00	0.00	121.77	68.09	2030.00	1480.00	0.00	0.00	0.00	1468.20	937.62	6105.68	06/30/2007
02-53-2625-07-O	D07	0.00	0.00	78.89	42.53	1430.00	2078.60	800.00	800.00	0.00	2162.10	3428.18	10820.30	06/30/2007
02-53-2625-07-O	S12	0.00	0.00	58.44	25.56	140.00	723.40	0.00	0.00	0.00	112.00	0.00	1059.40	06/30/2007
02-53-2651-07-R	D07	0.00	0.00	123.94	68.09	2508.00	1657.00	70.00	0.00	0.00	1549.46	124.79	6101.28	06/30/2007
02-53-2659-07-O	D07	0.00	0.00	96.95	42.11	2267.00	1527.20	306.96	57.99	0.00	1669.85	1946.19	7914.25	06/30/2007
02-53-2659-07-O	S12	0.00	0.00	38.96	17.04	243.00	173.80	0.00	0.00	0.00	56.00	0.00	528.80	06/30/2007
02-57-2475-06-O	S12	0.00	0.00	58.44	25.56	547.91	270.10	0.00	0.00	0.00	106.00	0.00	1008.01	06/30/2007
02-57-2475-06-O	D07	0.00	0.00	53.56	30.46	1748.64	456.80	500.00	578.00	0.00	2369.31	1881.65	7618.42	06/30/2007
02-57-2475-06-O	P19	0.00	0.00	0.00	0.00	1442.60	1057.40	0.00	0.00	0.00	294.00	0.00	2794.00	06/30/2007

Page: 1

Ready NUM

SAMPLE – GAX Form (Payment Voucher)

Attach supporting documentation to the back of this form

STATE OF IOWA
DEPARTMENT OF HUMAN RIGHTS

GAX

BUDGET FY 07		GENERAL ACCOUNTING EXPENDITURE								DOCUMENT NUMBER					
VENDOR CODE 42092038800		AGENCY NAME IA Department of Human Rights													
VENDOR NAME AND ADDRESS MATURA Action Corporation 203 W. Adams Creston, Iowa 50801		BILL TO ADDRESS (ORDERING AGENCY) IA Department of Human Rights Division of Community Action Agencies Lucas State Office Bldg Des Moines, Iowa 50319						SHIP TO ADDRESS							
TERMS		FOB		ORDER APPROVED BY						GOODS RECEIVED/SERVICES PERFORMED					
QUANTITY		VENDOR'S INVOICE DATE		VENDOR'S INVOICE NUMBER						DATE INITIALS					
ORDERED	RECEIVED	UNIT OF MEASURE	Request for payment under Contract #DOE-07-04E						UNIT PRICE	TOTAL PRICE					
										15,000.00					
DOCUMENT TOTAL								15,000.00							
CLAIMANT'S CERTIFICATION						DEPARTMENT CERTIFICATION									
I CERTIFY THAT THE ITEMS FOR WHICH PAYMENT IS CLAIMED WERE FURNISHED FOR STATE BUSINESS UNDER THE AUTHORITY OF THE LAW AND THAT THE CHARGES ARE REASONABLE, PROPER, AND CORRECT, AND NO PART OF THIS CLAIM HAS BEEN PAID.						I CERTIFY THAT THE ABOVE EXPENSE WERE INCURRED AND THE AMOUNTS ARE CORRECT AND SHOULD BE PAID FROM THE FUNDS APPROPRIATED BY:									
DATE		TITLE Jerry Smith, Executive Director				CODE OR CHAPTER SECTION(S)									
CLAIMANT'S SIGNATURE						AUTHORIZED SIGNATURE									
THE FOLLOWING FIELDS ARE FOR STATE ACCOUNTING USE ONLY															
DOC TYPE GAX	DOC NUMBER		DOC DATE	ACCTG PRD	BUDGET FY	ACTION NEW/MOD E	PO SHIP INSTR	PV TYPE 1	INT IND	INT SELLER FUND	INT SELLER				
VENDOR CODE 42092038800		ADDR OVERRIDE	F/A INDICATOR	EFT IND	TEXT -po's only (Y/N)			TEXT (po's only)							
REF DOC TYPE	REF DOC NUMBER		REF DOC LINE	COM LN	VEND INVOICE #	COMMODITY CODE	GS CONTRACT								
LINE	FUND	AGCY	ORG	SUB ORG	ACTV	FUNC	OBJT	SUB OBJT	JOB NUMBER	REP CAT	QUANTITY / UNITS	I/D	DESCRIPTION	AMOUNT	I/D
01	0041	379	217C				2495								
02															
03															
04															

DOCUMENT TOTAL

GAX

WARRANT #

AUDITED BY

PAID DATE

SAMPLE – Expenditure Summary Report

DOE/OC Expenditure Summary Report (101)								Page 1
MATURA Action Corporation								
DOE-07-04E								
June 2007								
Section A: DOE/OC Expenditures				Section B: Augmenting				
Budget Category	Contract Budget	Current Month Expenditure	Expenditure To Date	Balance Available	Current Month HEAP Augment	Expend To Date HEAP Augment	Total DOE/OC & HEAP Expend	
A	B	C	D	E	A	B	C	
1. Administration	\$13,991.00	\$700.00	\$700.00	\$13,291.00	\$0.00	\$0.00	\$700.00	
2. Health and Safety	\$17,552.00	\$2,884.00	\$2,884.00	\$14,668.00	\$1,622.93	\$1,622.93	\$4,506.93	
3. Support	\$22,753.00	\$4,298.24	\$4,298.24	\$18,454.76	\$3,402.23	\$3,402.23	\$7,700.47	
4. Labor	\$23,728.00	\$3,490.94	\$3,490.94	\$20,237.06	\$0.00	\$0.00	\$3,490.94	
5. Materials	\$23,728.00	\$3,750.82	\$3,750.82	\$19,977.18	\$0.00	\$0.00	\$3,750.82	
6. Landlord Contribution	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
7. Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
8. Other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
9.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
10.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
11.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
12.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
13. Total	\$101,752.00	\$15,124.00	\$15,124.00	\$86,628.00	\$5,025.16	\$5,025.16	\$20,149.16	
14. Payments received to date							\$12,000.00	
15. Expenditures to date (Column D)							\$15,124.00	
16. Work in Process (Actual expenses incurred on homes not completed)							\$0.00	
17. Cash On Hand							(\$3,124.00)	
18. Payments requested but not received							\$1,000.00	
19. Projected Expenses Next 30 Days							\$0.00	
20. Payments requested this month							(\$2,124.00)	
Section C: Production Information								
1. Contract Goal (Homes)		30			Percent of Goal Completed		13	
(HS+SUP+LAB+MAT) / \$2,885					(Complete + Reweatherized) / Goal			
		Current Month				Cumulative		
2. Non CI Completions		4				4		
3. CI Completions		0				0		
4. Reweatherized		0				0		
5. Closed Incomplete Homes		0				0		
Total Homes		4				4		
Preparer's Name and Title		Phone	Date	Time				
							07/16/2007 12:38:01 PM	

SAMPLE – Expenditure Detail Report

Microsoft Access - [repDOEDetail] Type a question for help

File Edit View Tools Window Help

96% Close Setup

DOE/OC Expenditure Detail Report (102N)

MATURA Action Corporation
DOE-07-04E
06/01/2007 to 06/30/2007

WXFileNumber	DateOfCompletion	Completed	Rew	Furnace	HealthAndSafety	Support	Labor	Materials	LandlordContribution	Total
04-87-543-1	06/29/2007	Y	N	Y	\$3,029.25	\$2,438.86	\$1,772.95	\$1,502.13	\$0.00	\$8,743.19
04-80-539-4	06/20/2007	Y	N	Y	\$11.75	\$2,272.70	\$924.47	\$1,460.64	\$0.00	\$4,669.56
04-88-542-2	06/29/2007	Y	N	N	\$703.36	\$1,368.11	\$486.04	\$472.81	\$0.00	\$3,030.32
04-88-542-3	06/20/2007	Y	N	N	\$762.57	\$1,620.80	\$307.48	\$315.24	\$0.00	\$3,006.09
Total Cost Homes:					\$4,506.93	\$7,700.47	\$3,490.94	\$3,750.82	\$0.00	\$19,449.16
Total Cost Completed and ReWeatherized Homes					\$4,506.93	\$7,700.47	\$3,490.94	\$3,750.82	\$0.00	\$19,449.16
TotalHomes:	4									
Completed:	4									
NotCompleted:	0									
ReWeatherized:	0									
Completed Home Average Cost:	\$19,449.16 /	4								\$4,862.29
Completed Home Maximum HS Cost:	\$721.00 *	4								\$2,884.00
Completed Home Maximum Cost:	\$2,885.00 *	4								\$11,540.00
Total					\$4,506.93	\$7,700.47	\$3,490.94	\$3,750.82	\$0.00	\$14,942.23
Total to D07					\$2,884.00	\$4,298.24	\$3,490.94	\$3,750.82	\$0.00	\$11,540.00
Total to Augment										\$3,402.23
Augmentation					\$1,622.93	\$3,402.23	\$0.00	\$0.00		\$5,025.16

Transfer to AC2 Transfer to AC3 Transfer to AC4 Transfer to AC5 Transfer to AC6

Transfer to BA2 Transfer to BA3 Transfer to BA4 Transfer to BA5

Page: 1

Ready NUM

SAMPLE – Demographics Report

DOE/OC Demographics Report (103N)

**MATURA Action Corporation
DOE-07-04E
06/01/2007 to 06/30/2007**

06/01/2007 to 06/30/2007

Annual Data Year: 2007

1. Dwelling Units

A. Completed units by type of unit

1. Owner Occupied. Site Built	4	4
2. Renter Occupied/single Site Built	0	0
3. Renter Occupied Multi	0	0
4. Owner Occupied Mobile Home	0	0
5. Renter Occupied/ Mobile Home	0	0
6. Shelter	0	0
7. Total	4	4

B. Completed units by fuel type

1. Natural Gas	3	3
2. Fuel Oil	0	0
3. Electric	0	0
4. Propane/LP	1	1
5. Wood	0	0
6. Coal	0	0
7. Other	0	0

C. Completed units by occupancy

1. Elderly Occupied	4	4
2. Disabled Occupied	3	3
3. Native American Occupied	0	0
4. Young child 3 years and younger	0	0

D. Dwelling units not completed 0 0

E. Dwelling units reweatherized 0 0

2. People assisted

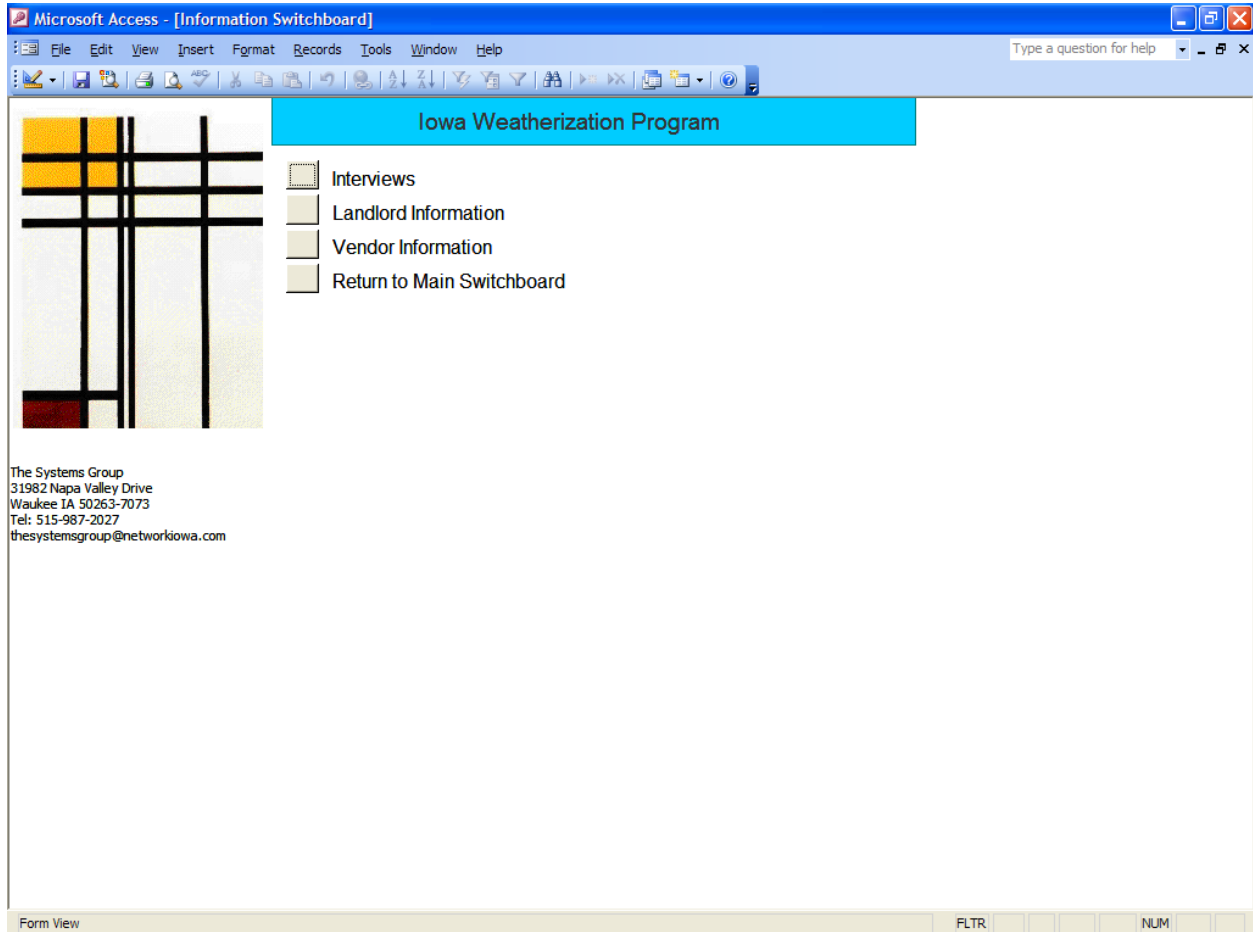
A. Elderly	4	4
B. Disabled	3	3
C. Native Americans	0	0
D. Young child 3 years and younger	0	0
E. Total individuals assisted	9	9

07/16/2007 12:51:05 PM

From: MAIN SWITCHBOARD

OTHER INFORMATION

This section contains three parts: Interviews, Landlord Information and Vendor Information



Interviews

Agencies are not required to use the interview, but it has been included as a tool for those who wish to use it.

This provides access to interviews already completed as well as blank interview screens. This section will be helpful if conducting interviews with several clients without jumping from file to file in the House Data screen.

The interview section includes two pages of questions and one page of notes. The questions are self-explanatory. This screen has a Time Stamp and Add a Note button to identify when various memos were added to the record. When completed the interview may be printed by clicking on the Print This Interview button on the bottom of the screen. The interview is opened in print preview format. Click on the print icon to print the completed interview.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Interview]". The window has a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar. The main area displays a form with the following fields and values:

- Agency File Number: 010207 (dropdown)
- Name: Vivian Howard
- Date of Phone Interview: 07/12/2007
- 1. How old is your home?: 67 years
- 2. Is your home for sale?: n or do you plan to move?: n
- 3. Any areas of the house being remodeled?: n
- If yes, explain: (empty text box)
- 4. Is there insulation in your attic?: y How much?: 4"
- 5. Is there any insulation in your sidewalls?: unknown
- 6. What type siding is on your home?: vinyl (dropdown)
- Replacement siding: (dropdown) if other type, please specify: (text box)

At the bottom of the form, there are two buttons: "Print This Interview" and "Close". The status bar at the bottom shows "Record: 1 of 1" and "Form View".

Microsoft Access - [Interview]

File Edit View Insert Format Records Tools Window Help

Type a question for help

Page 1 Page 2 Notes

Agency File Number: 010207 Vivian Howard

7. Are there any holes in the plaster in your home on the walls or ceiling?
 If yes, explain: kids bedroom door knob went through wall

8. Are there any leaks in your roof?
 If yes, explain:

9. Does your furnace seem to be working alright?
 If no, explain: cold in back of house

10. Do you have any waterbeds? If yes, how many? Sizes:

12. Problems for evaluator to look at:

13. Is there another phone number where you can be reached?

Weatherization appointment date: time:

Print This Interview Close

Record: 1 of 1

Form View

Microsoft Access - [Interview]

File Edit View Insert Format Records Tools Window Help

Type a question for help

Page 1 Page 2 Notes

Agency File Number: 010207 Vivian Howard

Notes: 07/13/2007 8:45:53 AM
 client has cats in house

Time Stamp and add a note

Print This Interview Close

Record: 1 of 1

Form View

Landlord Information

This is a database for the local agency landlord information including name, address, phone number, etc. Agencies will complete their own database. It will be used for producing landlord letters and landlord agreements. Additional names may be added as needed.

The screenshot shows the Microsoft Access interface for a database named 'Landlord'. The main window displays a form titled 'Landlord Database'. The form has several input fields: 'Landlord ID' with the value '123', 'Title/First/LastName' with 'Mr. John Doe', 'Company' (empty), 'Address' with '123 Anystreet', 'Zip Code' with a dropdown menu showing '50830' and a 'Zip4' field, 'City' with 'Afton' and 'State' with 'IA', 'Phone' with '555-123-1234', and 'Salutation' with 'Mr. Doe'. There is also a 'Notes' text area and a 'Print Landlord Labels' checkbox. At the bottom, there are buttons for 'Time Stamp and add a note', 'Preview Labels', 'Open Zip Code Table', and 'Close'. The status bar at the very bottom indicates 'Record: 1 of 1' and 'Form View'.

FIELD TITLE	DEFINITION/DESCRIPTION
Landlord ID	The identifying number assigned to the landlord by the agency
Title/First/Last Name	Landlord name (i.e. Mr. John Doe)
Company	Name of company which owns the property (if applicable)
Address	Street address of landlord
Zip Code + Zip4	Landlord zip code and +4 digit zip
City and State of Iowa	This will be completed by program based on zip code
Salutation	Fill in how the landlord is to be addressed (i.e. Mr. Doe or John or Mr. John Doe)
Notes	Any additional information about the landlord
Print Landlord Labels	Mark a specific landlord to print labels. Marked labels will be printed from the Reports/Letters section.

Vendor Information

This contains a database of all the current vendors in the state. If another vendor is used, new information from LHEAP needs to be added.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Vendor]". The window contains a form with the following fields and values:

- Vendor Code [UVC]: 0004
- Vendor [VLN]: ANITA MUNICIPAL UTILITIES
- Address1[ADD]: 828 MAIN STREET
- Address2: (empty)
- City [CIT]: ANITA
- State: IA
- Zip Code: 50020
- Phone [PHD]: (712) 762-3845
- Contact: MS BARBARA SISLER
- Contact Phone: (empty)
- HTS: E
- FOD: P

At the bottom of the form, there are two buttons: "Preview_Labels" and "Close".

Record: 14 of 1236

Form View

NUM

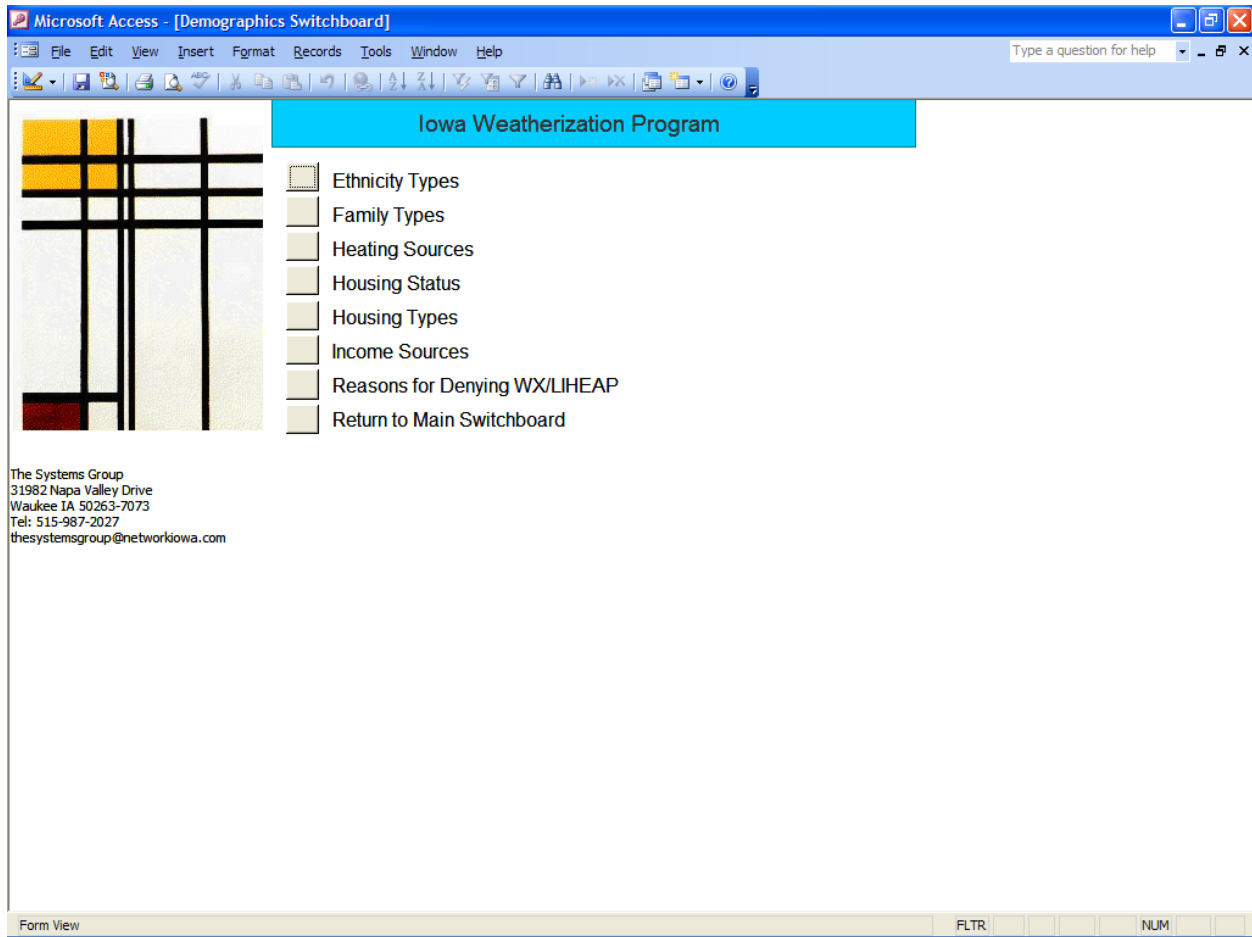
From: MAIN SWITCHBOARD

DEMOGRAPHICS TABLES

This contains seven parts: Ethnicity, Family, Heating Sources, Housing Status, Housing Types, Income Sources and Reasons for Denying WX/LHEAP.

These tables are set to correspond with the information from LHEAP and are not to be changed by local agencies. They are included here so agencies may become familiar with the codes. These tables list the codes used by the two different LHEAP software programs (CIS by THO and NIFCAP). Since there are some inconsistencies between the two programs, WAMS will recognize codes from both.

Table lists are on the following pages.



Ethnicity Table

Ethnicity	
Ethnicity ID	Ethnicity
A	Asian/Pacific Island
B	African American
C	White
H	Hispanic
I	American Indian
N	American Indian
O	Other
U	Unknown, Not Coded
W	White
X	Bosnian

Family Type Table

Family Type	
Family Type ID	Family Type
1	Single female with children
2	Single male with children
3	Two parents with children
4	Single person
5	Two adults without children
6	Other
C	Two parents with children
F	Single female with children
M	Single male with children
N	Two adults without children
O	Other
S	Single person
U	Unknown, Not Coded

Heating Source Table

Heating Source					
Heating Source ID	Heating Source	HS Conversion Factor	HS Sq ft Conversion Factor	Average Fuel Cost	Fuel Units
C	Coal	0.017	0.134	0.15	pound
E	Electric	0.003413	2.1902	0.08	kWh
F	Fuel Oil	0.14	0.2435	0.76	gallon
N	Natural Gas	0.1	0.1916	0.60	therm
P	Propane	0.0915	0.3453	0.68	gallon
W	Wood	20	0.134	150.00	cord
X	Other	20	0.134	150.00	cord-equivalent

Housing Status Table

Housing Status	
Housing Status ID	Housing Status
B	Buy
N	Homeless
O	Own
R	Rent
T	Other
U	Unknown, Not Coded

Housing Type Table

Housing Type	
Housing Type ID	Housing Type
A	Apartment
D	Duplex
F	Apartment
H	House
M	Mobile Home
O	Other
R	Rent a Room
S	Shelter
T	Apartment 3+ Units
U	Unknown, Not Coded

Income Sources Table

Income Source	
Income Source ID	Income Source
A	Employed
B	Unemployed
C	Self Employed
D	SSA
E	SSI
F	FIP/AFDC
G	Pension/Retired
H	Veteran Assistance
I	General Assistance
J	Minimal Income/None
K	ChildSupport/Alimony
L	Strike Pay
M	Farm Income
N	Interest Income
O	Other
U	Unknown, Not Coded
X	No Income

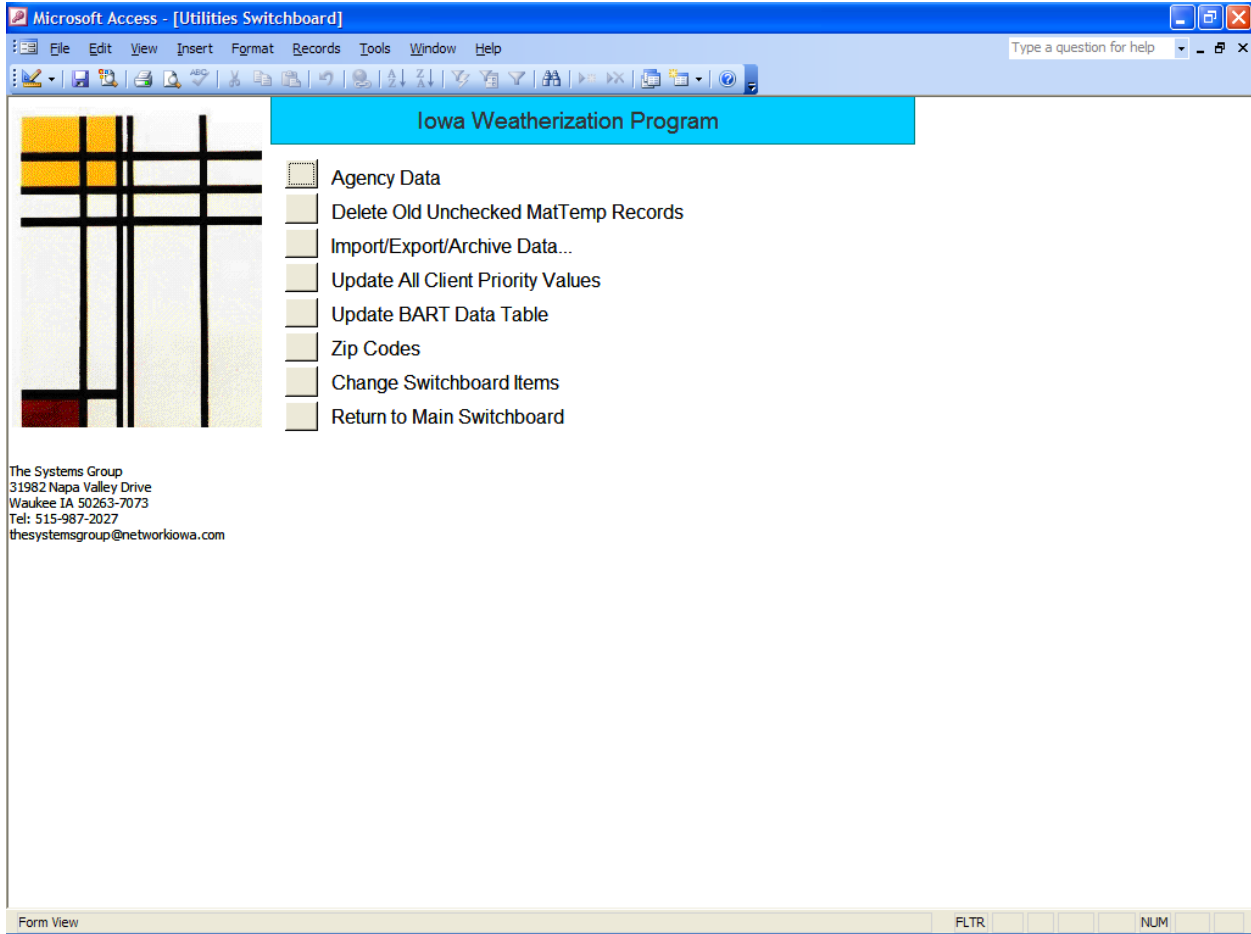
Reasons for Denying WX/LHEAP Table

Reasons	
Reason Code	Reason
01	Client moved
02	Client uncooperative
03	Client refused weatherization
04	Client deceased
05	Landlord refused
06	Landlord did not respond
07	Landlord did not maintain furnace/water heater
08	House being remodeled
09	Extensive repairs required
10	Mold/excessive moisture - beyond scope of program
11	Health and safety problems (not mold) - beyond scope of program
12	Health and safety hazard to workers
99	Other - describe in memo field

From: MAINSWITCHBOARD

SYSTEM UTILITIES

This section has seven parts. Some will be rarely used, others will only be used once a year and some will be used monthly.



Agency Data

This table includes agency specific information. The table has all the agencies listed. The only time an agency needs to use this table is if there is a change in the agency name, address or personnel.

Microsoft Access - [Agency]

File Edit View Insert Format Records Tools Window Help

Type a question for help

Agency Notes

AgencyNumber	04E	VendorCode	42092038800
Name	MATJURA Action Corporation		
Address1	203 W. Adams		
Address2			
City	Creston	State	IA
		ZipCode	50801
PostnetCode			
WorkPhone	515-782-8431		
FAX	515-782-6287		
EMail	EStarmer@matjuraaction.org		
Coordinator	WX Evaluator	Eldon	Starmer

Close

Record: 6 of 21

Form View

NUM

Delete Old Uncheck Mat Temp Records

This deletes and cleans out any unselected records in Mat Temp based on the date selected. This should be done by the agency as a part of general program maintenance. Larger agencies should probably run this at least every two months. Smaller agencies probably can do it two or three times per year.

After completing this process, agencies should run the Access feature to clean up the program.

- Click on Tools
- Click on database utilities
- Select Compact and Repair Database

Once completed WAMS will reopen to the Main Switchboard.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [The Outside World]". The menu bar includes File, Edit, View, Insert, Format, Records, Tools, Window, and Help. A search bar on the right says "Type a question for help". The toolbar contains various icons for file operations and navigation. The main form area is titled "Delete Old Unchecked MatTemp Records" and contains the following text:

Before proceeding, please remember once you have deleted the MatTemp records you will not be able to recover them.

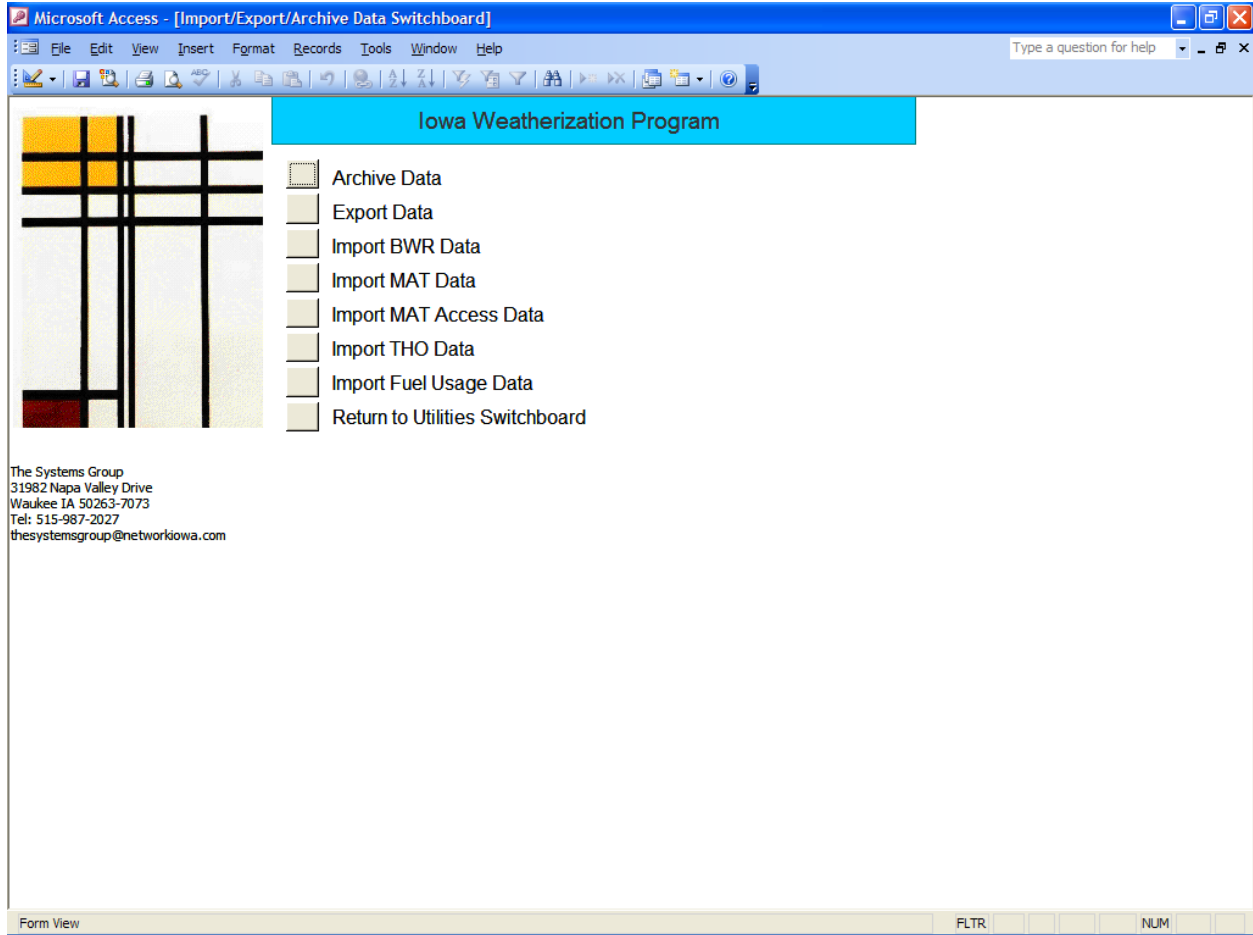
Delete Records Prior to BWR Completion Date (mm/dd/yyyy):

Below the text are two buttons: "Delete Records" and "Close Form".

The status bar at the bottom left shows "Form View" and the bottom right shows "NUM".

Import Export Archive Data

This section is used to transfer data from one database to another. It includes the process for sending monthly data to the state as well as importing the annual LHEAP data.



1. Archive Data

Most agencies do not want to remove old completion information as they want it readily available to them, but this can be used to clean out old completion records.

Data is archived to a blank database you create in the WAMS folder called Archive.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [frmArchiveData]". The window has a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar. The main area displays a form titled "Archive Data".

When you press the Archive button, the application will archive the records in the BWR and MAT-Final tables that meet the following criteria:

Completion Date less than or equal to:

Program:

Records will be archived to:

At the bottom of the form are two buttons: "Archive" and "Close".

The status bar at the bottom of the window shows "Form View" on the left and "NUM" on the right.

2. Export Data

This is used to send the monthly completion data to the state. The program exports completions within a specific data range to a blank database which is then compressed and e-mailed to the state.

- Click on Create Export Tables
- Complete the date range for the month needed. The date range must be entered twice – once for the BWR info and again for the Materials info.
- Select the second option in the Export Type
- Be sure the path is correct
- Click Export
- If it works properly a message will come up indicating that the BWR and MAT have been successfully exported. If there is no message, the program could not locate the blank database.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [The Outside World]". The menu bar includes File, Edit, View, Insert, Format, Records, Tools, Window, and Help. The toolbar contains various icons for file operations and navigation. The main form area is titled "Export Data" and contains the following text: "When you press the Export button, the application will export the BWR and MAT-Final tables as ascii comma delimited files to the [c:\temp] directory". Below this text is a "Create Export Tables" button. Underneath is a section titled "Export Type" with two radio button options: "Export BWRExport and MatTempExport as ascii comma delimited files to above directory" (which is selected) and "Export BWRExport and MatTempExport to Access Database [\\viowadsmfp02\DHRUser]". At the bottom of the form are "Export" and "[Close]" buttons. The status bar at the bottom left shows "Form View" and the bottom right shows "NUM".

3. **Import BWR Data**

This will only be used once a year when the new LHEAP data comes out. Instructions are always included with the data as some of the features on this screen are not used.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [The Outside World]". The menu bar includes File, Edit, View, Insert, Format, Records, Tools, Window, and Help. A search bar on the right says "Type a question for help". The main form area is titled "Import BWR Data" and contains the following elements:

- Instructions: "Before proceeding, please insure the BWR1 table does not exist. When you press the Import button, the application will import wx.dbf from the [c:\temp] directory and create the BWR1 table in the current database." (Note: "insure" is misspelled as "ensure").
- Buttons: "Delete BWR1", "Import", "Add BWR1 to BWR", "Update BWR", and "Close".
- Form Fields: "Import Type" with a radio button selected for "Import to Weatherization Database".
- Additional Instructions: "Before proceeding insure the table BWR1 has the records you want to add to BWR. The application will overwrite records in BWR that have the same AFN as records in BWR1." (Note: "insure" is misspelled as "ensure").

The status bar at the bottom left shows "Form View" and the bottom right shows "NUM".

4. **Import MAT Data**

This is used to import material data from another database. Agencies will not use this feature.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [The Outside World]". The menu bar includes File, Edit, View, Insert, Format, Records, Tools, Window, and Help. The status bar at the top right says "Type a question for help". The main form area is titled "Import MAT Data" and contains the following elements:

- A warning message: "Before proceeding, please insure the MAT1 table does not exist. When you press the Import button, the application will import MAT.dbf from the c:\temp directory and create the MAT1 table in the current database." Below this is a "Delete MAT1" button.
- An "Import Type" section with a radio button selected for "Import to Weatherization Database".
- An "Import" button.
- A second warning message: "Before proceeding insure you have ACTIVATED the houses and MAT1 has the records you want to converted. The application will update the records in MatTemp." Below this are three buttons: "Assign Sequence Numbers", "Update MatTemp", and "Close".

The bottom status bar shows "Form View" and a field labeled "NUM".

5. Import MAT Access Data

This is used to import material data from another Access database. Agencies will not use this feature.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [The Outside World]". The menu bar includes File, Edit, View, Insert, Format, Records, Tools, Window, and Help. A search bar on the right says "Type a question for help". The main form area is titled "Import MAT Access Data" and contains the following elements:

- A warning message: "Before proceeding, please insure the MAT1 table does not exist. When you press the Import button, the application will import MAT data from the [c:\Temp] directory and create the MAT1 table in the current database." Below this is a text box containing "c:\Temp".
- A "Delete MAT1" button.
- An "Import Type" section with a radio button selected for "Import to Weatherization Database".
- An "Import" button.
- A second warning message: "Before proceeding ensure you have ACTIVATED the houses and MAT1 has the records you want to add. The application will update the records in MatTemp." Below this is an "Update MatTemp" button.
- A "Close" button.

The bottom status bar shows "Form View" on the left and "NUM" on the right.

6. Import THO Data

The State converts LHEAP data from the software written by THO to data for WAMS by using this screen. Agencies will not use this feature.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [The Outside World]". The menu bar includes File, Edit, View, Insert, Format, Records, Tools, Window, and Help. A search bar on the right says "Type a question for help". The main area is a form titled "Link THO Tables".

Before proceeding, please insure the LHEAP, Household and Member tables are in the external directory. When you press the Link button, the application will link the tables from your Access Application in

Before proceeding ensure tbITHO have the records you want to add to BWR. The application will overwrite records in BWR that have the same AFN as records in tbITHO.

Form View

NUM

7. Import Fuel Data

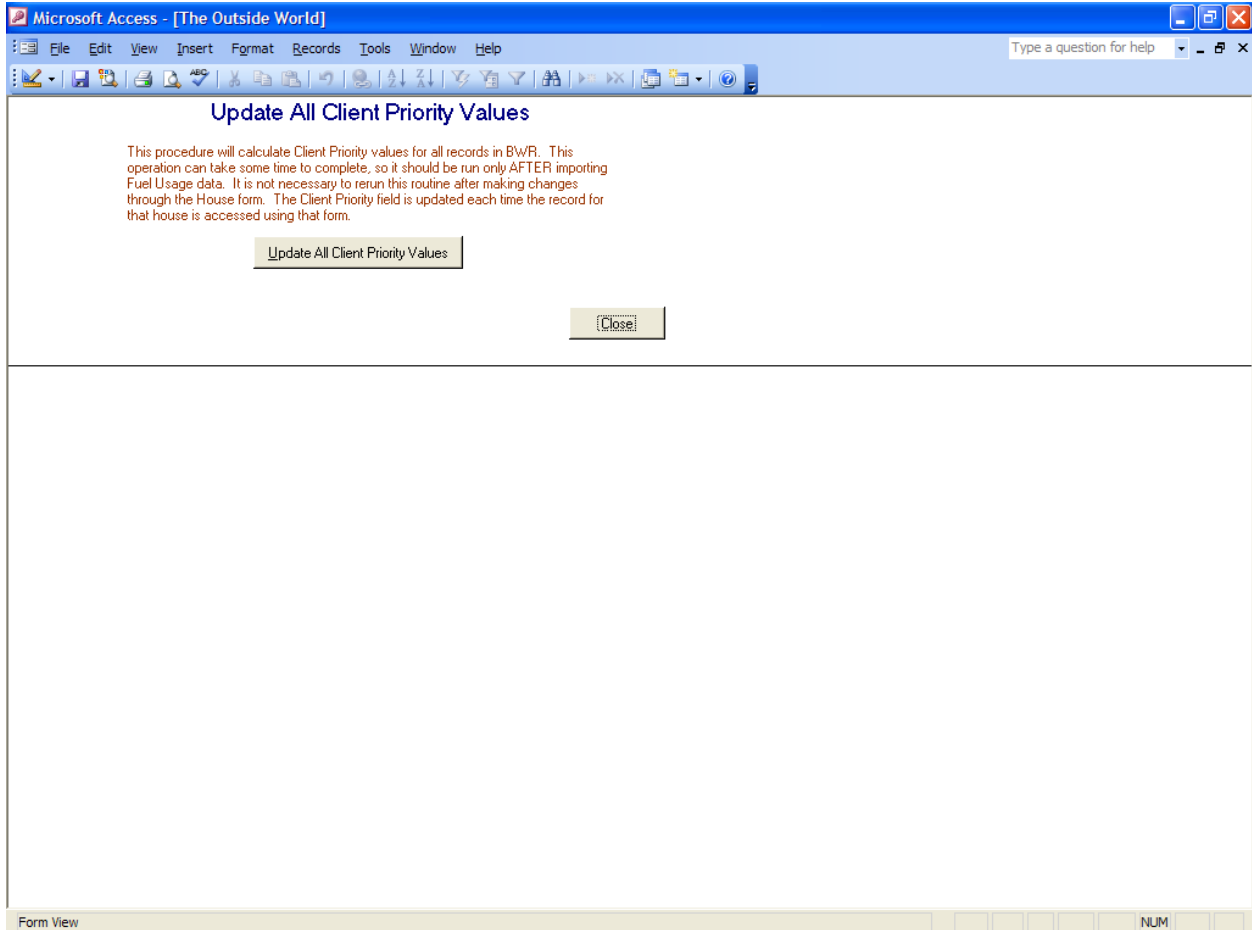
This will only be used once a year when the new LHEAP data comes out. Instructions are always included with the data.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [The Outside World]". The menu bar includes File, Edit, View, Insert, Format, Records, Tools, Window, and Help. A search bar on the right says "Type a question for help". The toolbar contains various icons for file operations and data manipulation. The main form area is titled "Import Fuel Usage Data" and contains the following text: "This procedure will import fuel records from a comma-delimited file with header row that contains fuel consumption data. The data will be imported into the existing fuel usage data file. When you press the Import button, the application will import Fuel.txt from the following directory:". Below this text is a text box containing "c:\temp". There are two buttons: "Import" and "Close". The status bar at the bottom left says "Form View" and the bottom right shows a grid of fields with "NUM" in the last cell.

Update All Client Priority Values

This will be used anytime fuel data is imported or entered. It will update all client priorities at once rather than going through the House Data files one at a time to calculate the priority number.

Click on the Update button to activate the calculations. It will take a few minutes to go through this process.



Update BART Data Table

WAMS imports the data tables from the BART program to make data entry easier when exchanging refrigeration appliances. This must be run anytime changes are made in the BART program.

Be sure the path to the BART program is correct and click on the Import button. If the path is not correct an error message will appear.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [The Outside World]". The menu bar includes File, Edit, View, Insert, Format, Records, Tools, Window, and Help. A search bar on the right says "Type a question for help". The main area displays a dialog box titled "Import BEEP Appliance Rating Tool Data Tables".

Before proceeding, please insure the BART.mdb file is in the external directory.
When you press the Import button, the application will import the appropriate BART.mde data table from your Access Application in:

At the bottom of the window, the status bar shows "Form View" and a field labeled "NUM".

ZIP Codes

This is just a table of zip codes for the United States

Change Switchboard Items

Agencies do not have access to this feature.

This manual contains some fairly detailed descriptions of the WAMS program, but sometimes an agency has a new employee who needs to jump in without the benefit of any training. In those cases, some “down and dirty” instructions are needed. The following should allow someone with basic database knowledge to run the WAMS program.

WAMS Process:

Open CLIENT DATA

Locate client by name

Assign Weatherization File number using agency number – county number – XXXX
(i.e. 12-06-1234)

Close CLIENT DATA

Open HOUSE DATA

Locate client by WX file number

House Data tab

1. Check the following fields for accuracy:
 - Phone number
 - Housing type (House, Apartment, Mobile home, etc)
 - Fuel type (Natural gas, Electricity, Propane, etc.)
 - Housing status (Own, Rent, Buying)
 - Double check the address for accuracy
2. Complete the fields: Volume and Square feet

Mat Temp tab

1. Click on ACTIVATE button on bottom of screen – this loads the pre-programmed table of measures. Looking at fields on the screen line-by-line:
 - Select – used to indicate the measure was installed – just click in the field to mark it.
 - Sequence number – assigned identifying number for various measures – cannot change these.
 - Work item – description of measure installed – DO NOT change the pre-programmed measures
 - Catalog number – pre-programmed – do not change
 - Program – identify which program is paying for that specific measure
 - Labor type – 1 = crews, 2 = contract labor, 3 = furnace contractor

 - Notes (location) – any information needed to clarify work completed
 - Cost category – Pre-programmed – do not change
 - Insulation type – for insulation measures only C = cellulose, F = fiberglass, most insulation records are already programmed with this info.
 - User type – if agency has identified as specific measure as high cost (very seldom used)
 - Reinsulate – is the area being reinsulated, Yes or No
 - R-Value – r-value of insulation being added

 - Notes (work item) – any information about the measure
 - Measure – indicates where insulation is being installed (CI = ceiling insulation, WI = wall insulation) these are pre-programmed to agree with the Work Item on the first line
 - Ob/Wrk – work in process or obligated (used to track work in process for reporting purposes)

 - Flat bid quantity – number installed – based on Work Item description
 - Hourly Rate – hourly rate paid to contractors
 - Hours – amount of time allowed to complete the measure described
 - Labor – amount of labor contractor will be paid for the described measure
 - Cost of Materials – amount contractor will be paid for the described materials
 - Support – only used on the support sequence numbers (1030, 1040, 1050, 1060)
 - Flat bid total – total amount contractor will be paid for that measure

- The next two lines are not used, just the total line which is used for measures that do not fall into a set flat rate measure. Complete quantity, labor charged, materials cost for each measure.
 - All insulation measures require the Area field to be completed – this is the square feet insulated.
2. For agency using the flat rate, this screen is fairly simple. Just select the measure, assign a Program to be charged, assign a labor type, and fill in quantity on the flat bid line.

Tech Info tab

1. Required fields include:
 - Blower door test pre- and post-
 - CO Readings pre- and post- (if an appliance is electric, just click in the ELECTRIC field)
 - Water heater type – use the following N, P, E for natural gas, propane or electric
2. Attic by-pass leakage test –test is not required, but results must be reported if test is completed
3. Garage leakage test – test required for all attached or tuck under garages, results must be reported.
4. The “Change in CFM” fields are all calculated – you don’t need to complete these

After WX tab

1. Required fields include:
 - Date of evaluation
 - Completed – Yes or No
 - Date of completion – the program will stop you here if not all the required information is entered
 - Reweatherized – Yes or No
 - Evaluator name
 - Inspector name
2. Other fields you should complete
 - Contractor names – all that apply to this job
 - Furnace contractor – for tune and clean as well as replacement (if applicable)
3. The field for Refrigerators Replaced, Freezers Replaced, Furnace, Program, and Contract, Heating System Total Cost and Total Material and Labor Costs will be automatically completed when you enter the date of completion.

Mat Final tab

After entering the date of completion on the After WX screen, the selected sequence numbers from Mat Temp are transferred to this screen. You can review and/or modify selected items easier. If you need to add additional measures you must go back to the Mat Temp tab and work from there, then re-enter the date of completion on the After WX screen.

Cost Final tab

This screen summarizes the costs by cost category. Only a tool – you don’t need to do anything here

Heating Fuel Data and Electric data tabs

Used to display the tables containing fuel data information, which is the basis of priority points. You will use this screen if entering deliverable fuels or data from municipal or rural electric vendors.

Notes tab

Provide any additional information about the house or client here. For example – the client has a very large mean dog or the client is only home after a certain time of the day. This just gives everyone more info.

Error check button

Checks for a very limited number of errors – basically it is an outdated tool. You do not need to use it.

House Data button

Produces the house data report for the client/house file. This is required.

Mat List button

Produces the materials list report for the client/house file. This is required.

Mat Detail button

Produces a different materials list (sequence number order). Only a tool – not required

Interview button

Goes to a pre-evaluation interview form for initial client contact. I don't know of any agency currently using this form, but it is available.

Landlord button

Some agencies (usually in the larger cities) have a database of landlord names and addresses for contact. Most agencies have so many different landlords that it is not used.

Client button

Takes you to Client Data, is filtered to just that specific file.

Activate button

Used to activate and import the Materials Temp screen. This will be used on every job.

Run MS Word button

Opens Microsoft Word if you needed to create a document.

Close button

Return to Main Switchboard

Open REPORTS

CLIENT REPORTS

The first two selections will probably not be used.

- CLIENT PRIORITY LIST
 - Create the priority list for the evaluator to work from.
 - County Code Range – only print one county at a time, so To and From should be the same number
 - Priority Point Range – leave at default
 - Vendor Number Range – leave at default, unless you need to print a specific vendor priority list. Just remember that the evaluator must have the list for all clients, not by vendor. The state program monitor will check for this.
 - Date Range – select beginning date of last fall's fuel program (10/01/2004) and ending date of today.
 - Click on Sort by Priority Number button to create the report in print preview. You may print as many pages of it as you believe will be needed.
 - Click on close to return to switchboard
- CLIENT BY VENDOR
 - Create lists for gathering fuel data from deliverable, municipal and rural electric vendors.
 - Select vendor code
 - Date Range – select beginning date of last fall's fuel program (10/01/2004) and ending date of today
 - Click on List by Primary Vendor Code.
 - This list can then be sent to the various vendors to gather fuel data for priority lists.
- RETURN TO REPORTS SWITCHBOARD

COMPLETIONS/WORK IN PROCESS

Probably will not be used unless using database to track work in process.

FINANCIAL REPORTS

➤ PURCHASE ORDERS

- Produces payment vouchers to be submitted to the state with monthly reports
- Fill in Invoice Data, Contract number, Invoice total, Claimant Title and Signature Data.
- Complete the correct codes for the contract being reported on Line 1.
- Click on Preview Purchase Order to open the voucher in print preview
- Click on print icon to print the voucher.
- Click on CLOSE

➤ DEMOGRAPHICS, DETAIL, SUMMARY AND UTILITY REPORTS

- Each of these go to the Expenditure Report Criteria Screen
- Report Headings – select the report you want to create
- Agency number – should remain every month
- Universal Vendor code – select correct vendor for the utility report
- Contract number – will complete automatically when you verify criteria
- YTD Begin – start date of current program year
- Start date – first day of report month
- To date – last day of report month
- Program – select program to report – D07 (DOE) H07 (HEAP) P07 (all utility reports)
- The last items (Capital Intensive, Max Health & Safety, and Max House Costs) will complete automatically when you Verify Criteria
- After selecting all the criteria, click on the Verify button – this just makes sure all the headings and program information matches.
- Then select the type of report you are creating.
- Demographics Report – run for both DOE & HEAP reports
Opens report in print preview. Click on print icon
- Detail Report – run for each report (DOE, HEAP, & all Utility contracts)
 - a. Opens the detail report for review. Click on update values and save for the summary report.
 - b. Click on Print Report – opens report in print preview. Click on print icon.
 - c. Close back to Criteria Screen
- Utility Report – agency does not use this report
- Summary Report - run for each report (DOE, HEAP, & all Utility contracts)
 - a. Opens Summary Report for review. Should show the current month expenses from the detail reports. On the HEAP summary report, be sure to fill in the Augmented Amount (if any) from DOE
 - b. Complete all other information – monthly administrative expenses, funds received to date, work in process, and funds requested not received.
 - c. Click on Update values to import budget and cumulative amounts.
 - d. Click on Print report – opens in print preview, click on print icon, close
 - e. Click on Save report – if you don't save, the cumulative figures will not be available next month.
- Close – to Financial Report switchboard

➤ PRINT SAVED REPORTS – stores all saved summary reports.

➤ RETURN TO REPORTS SWITCHBOARD

➤ The rest of the selections in Reports will probably not be used.

RETURN TO MAIN SWITCHBOARD

The OTHER INFORMATION and DEMOGRAPHICS only contain agency info and other tables. You will not need to go into these. Feel free to explore as you wish.

SYSTEM UTILITIES

- AGENCY DATA – lists all agencies, address, phone number etc. – can be changed as needed.

- DELETE UNCHECKED MAT TEMP RECORDS – should run once a month.
 - Select current date and click delete records.
- IMPORT/EXPORT/ARCHIVE DATA
 - Will use the export monthly to send current completion data to the state.
 - Click on Export Data
 - a. Click on Create Export Tables
 - b. Enter current month dates
 - c. Select Export BWR Export and MatTempExport to Access Database
 - d. Be sure path is correct
 - e. Click on Export Data
 - f. You should get a message that the export was successful, if you don't, the export did not work.
 - g. Close
 - The rest of the IMPORT buttons are only used once a year and will be explained as needed
 - Close to Utilities switchboard
- The rest of these Utility Switchboard items will only be used occasionally and will be explained as needed.