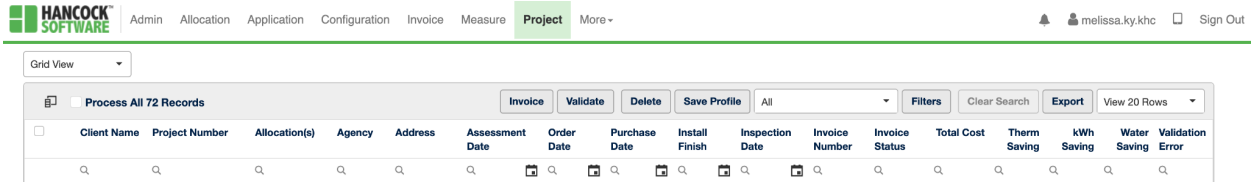
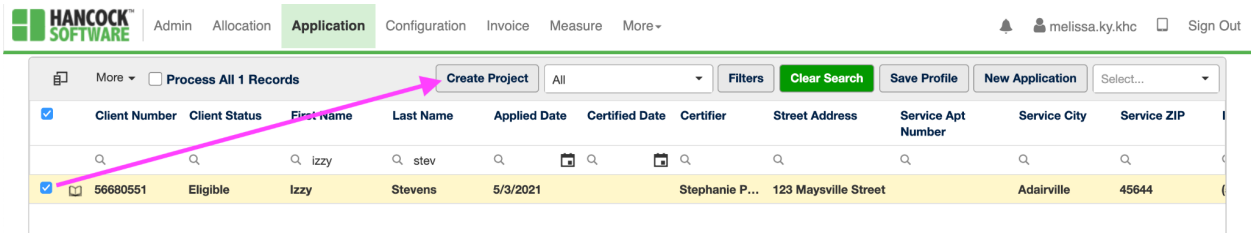


On the Project screen you will notice it is set up to mirror that of the Application screen. Here you are able to search for your Project. You can use any of the columns to narrow down the list and find your Project.

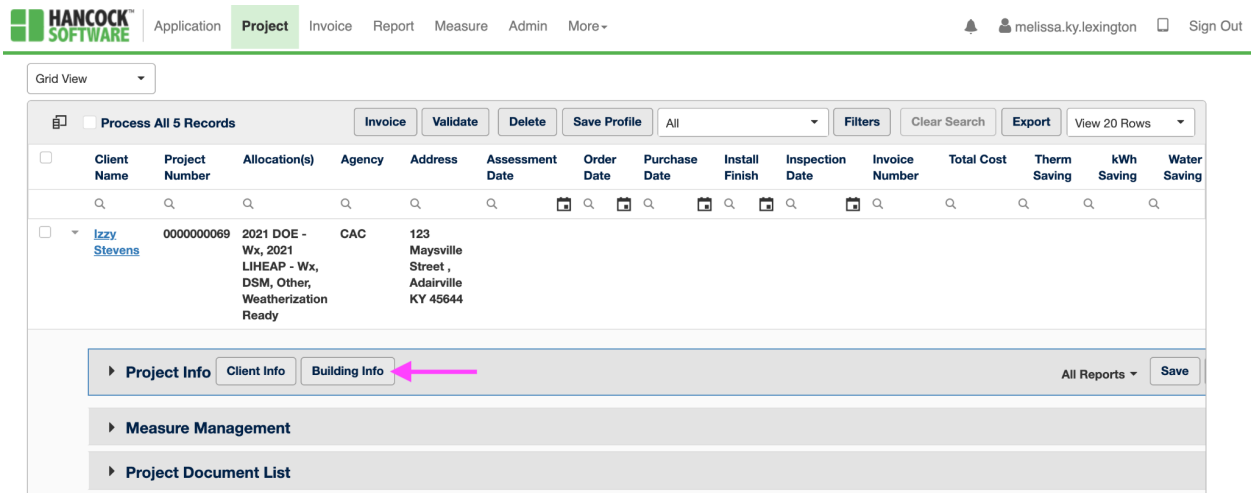


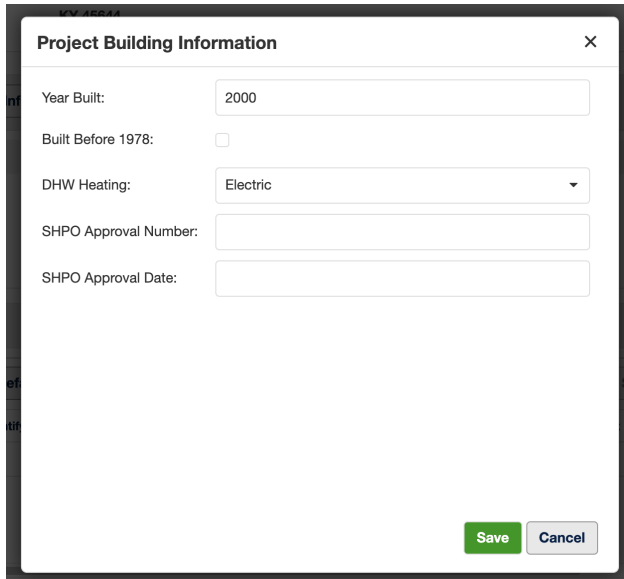
Project Review

1. Once you have completed the Application, select the checkbox and 'Create Project':



2. You will then be brought to the Project screen automatically, where you can select the arrow next to the record to open the Project. You can begin by completing the 'Building Info':





The screenshot shows a web form titled "Project Building Information" with a close button (X) in the top right corner. The form contains the following fields:

- Year Built: A text input field containing the value "2000".
- Built Before 1978: A checkbox that is currently unchecked.
- DHW Heating: A dropdown menu with "Electric" selected.
- SHPO Approval Number: An empty text input field.
- SHPO Approval Date: An empty text input field.

At the bottom right of the form, there are two buttons: a green "Save" button and a grey "Cancel" button.

NOTE: If the house is over 50 years old SHPO Approval is required.

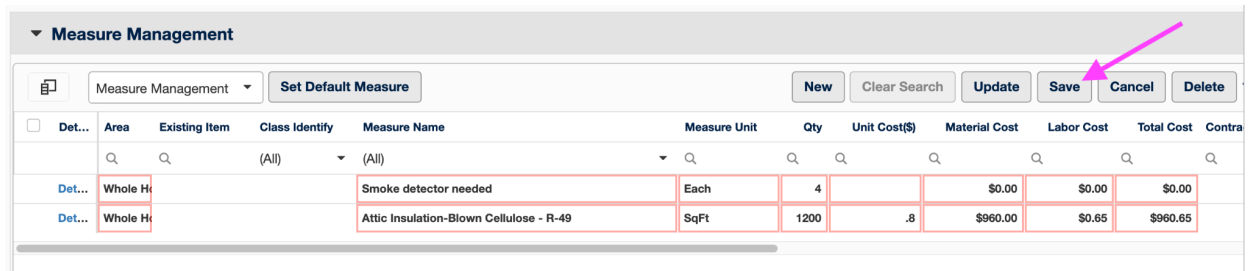
Measure Management

1. To add a Measure you will begin by selecting 'New':



The screenshot shows the Measure Management interface. At the top, there is a header with project information: 'Izzy Stevens', '0000000069', '2021 DOE - Wx, 2021 LIHEAP - Wx, DSM, Other, Weatherization Ready', 'CAC', and '123 Maysville Street, Adairville KY 45644'. Below this are tabs for 'Project Info', 'Client Info', and 'Building Info'. The 'Measure Management' section is expanded, showing a search bar, a 'Set Default Measure' button, and a row of action buttons: 'New', 'Clear Search', 'Update', 'Save', 'Cancel', and 'Delete'. A pink arrow points to the 'New' button.

2. When adding Measures, you can manually enter the cost, or accept the pre-populated amount. Once the data is entered you will select 'Save', if the fields are outlined in red the data is not saved:



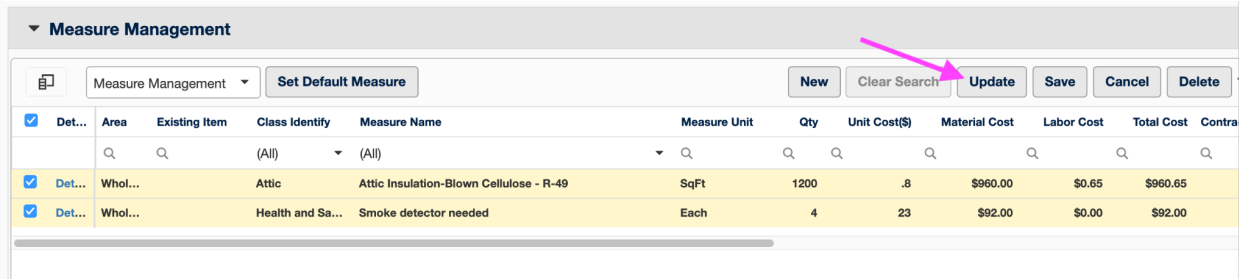
The screenshot shows the Measure Management interface with a table of measures. The table has columns: Det..., Area, Existing Item, Class Identify, Measure Name, Measure Unit, Qty, Unit Cost(\$), Material Cost, Labor Cost, Total Cost, and Contra. Two rows are visible:

Det...	Area	Existing Item	Class Identify	Measure Name	Measure Unit	Qty	Unit Cost(\$)	Material Cost	Labor Cost	Total Cost	Contra
Det...	Whole H		(All)	Smoke detector needed	Each	4		\$0.00	\$0.00	\$0.00	
Det...	Whole H		(All)	Attic Insulation-Blown Cellulose - R-49	SqFt	1200	.8	\$960.00	\$0.65	\$960.65	

The 'Save' button in the action bar is highlighted with a pink arrow.

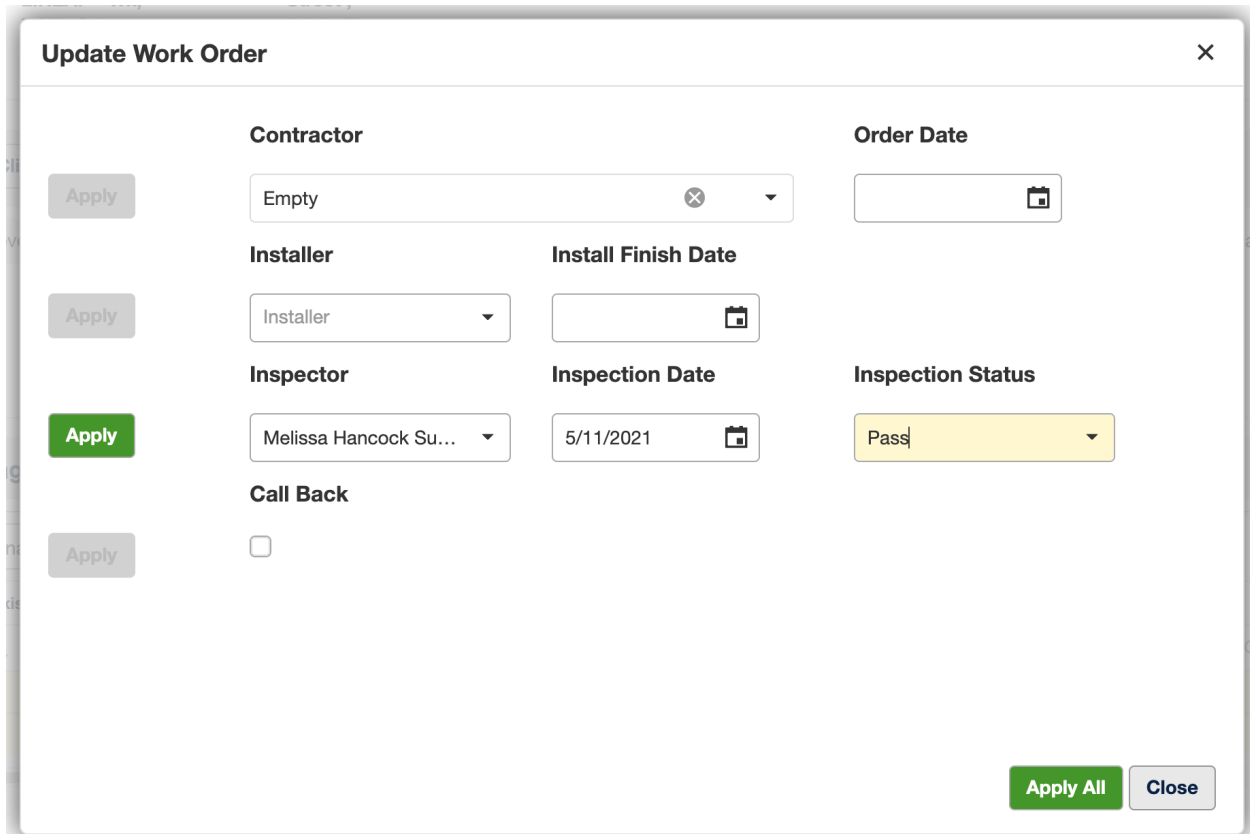
NOTE: Material and Labor costs are a Total cost for that field.

3. Once all measures are added select 'Update'. This will then pop up a Work Order. Here you can add the Inspector, Inspection Date, and Status:



Det...	Area	Existing Item	Class Identify	Measure Name	Measure Unit	Qty	Unit Cost(\$)	Material Cost	Labor Cost	Total Cost	Contra
Det...	Whol...		Attic	Attic Insulation-Blown Cellulose - R-49	SqFt	1200	.8	\$960.00	\$0.65	\$960.65	
Det...	Whol...		Health and Sa...	Smoke detector needed	Each	4	23	\$92.00	\$0.00	\$92.00	

4. Add your Inspector and Final QC Inspection Date and select 'Apply'



Update Work Order ✕

Contractor

Apply

Installer

Apply

Inspector

Apply

Call Back

Apply

Order Date

Install Finish Date

Inspection Date

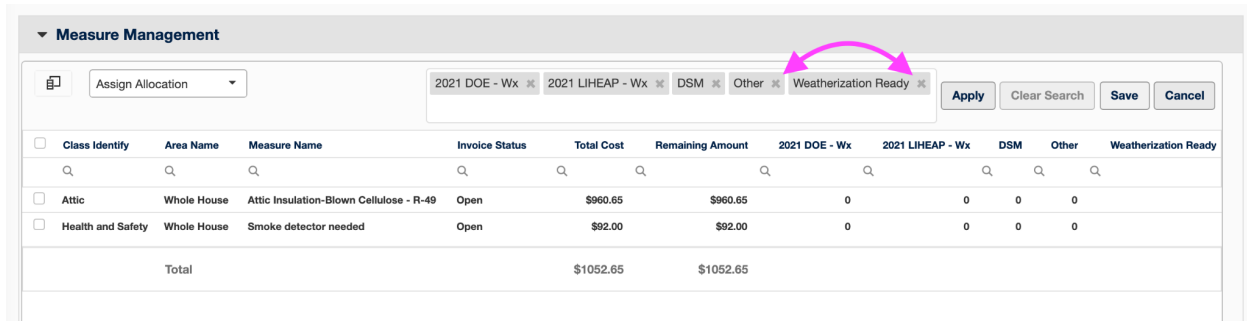
Inspection Status

Apply All

NOTE: You can fill in data in any/all of the fields and select 'Apply All' to avoid having to select 'Apply' on each line.

Assign Allocation:

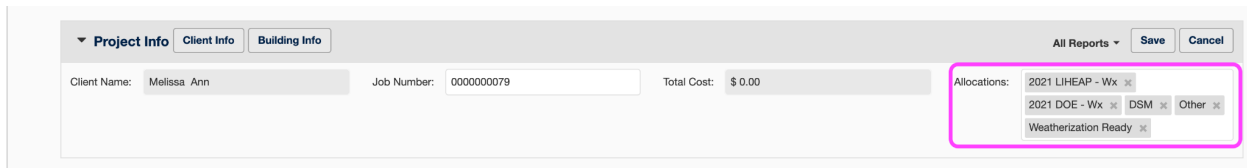
When in 'Assign Allocation', before assigning funds, you will notice all applicable Allocations listed in the top menu bar. If there are Allocations you will not be using you can select the 'x' to remove them from the list:



The screenshot shows the 'Measure Management' interface. At the top, there is a search bar with the text 'Assign Allocation' and a dropdown menu. To the right of the search bar, there is a list of allocation tags: '2021 DOE - Wx', '2021 LIHEAP - Wx', 'DSM', 'Other', and 'Weatherization Ready'. Each tag has a small 'x' icon to its right. A pink arrow points from the 'x' icon of the 'Weatherization Ready' tag to the 'Apply' button. Below the search bar is a table with the following columns: Class Identify, Area Name, Measure Name, Invoice Status, Total Cost, Remaining Amount, 2021 DOE - Wx, 2021 LIHEAP - Wx, DSM, Other, and Weatherization Ready. The table contains two rows of data and a total row.

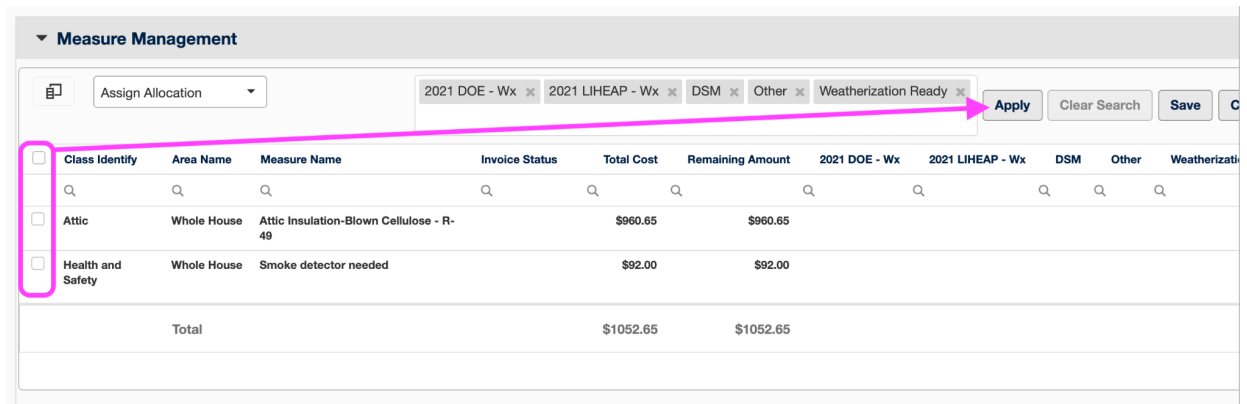
Class Identify	Area Name	Measure Name	Invoice Status	Total Cost	Remaining Amount	2021 DOE - Wx	2021 LIHEAP - Wx	DSM	Other	Weatherization Ready
Attic	Whole House	Attic Insulation-Blown Cellulose - R-49	Open	\$960.65	\$960.65	0	0	0	0	0
Health and Safety	Whole House	Smoke detector needed	Open	\$92.00	\$92.00	0	0	0	0	0
Total				\$1052.65	\$1052.65					

Additionally you can remove unnecessary Allocations from the Project Info section:



The screenshot shows the 'Project Info' section of the interface. It includes fields for Client Name (Melissa Ann), Job Number (0000000079), and Total Cost (\$0.00). On the right side, there is a dropdown menu labeled 'Allocations:' which contains the same list of allocation tags as seen in the previous screenshot: '2021 LIHEAP - Wx', '2021 DOE - Wx', 'DSM', 'Other', and 'Weatherization Ready'. A pink box highlights this dropdown menu.

1. To assign funds, you will start by checking the box next to the Measure and select 'Apply' this will evenly distribute the funds between those measures listed in the menu bar:



The screenshot shows the 'Measure Management' interface. The checkboxes next to the 'Attic' and 'Health and Safety' rows in the table are selected. A pink arrow points from the 'Apply' button to the 'Weatherization Ready' tag in the menu bar. The table data is the same as in the previous screenshot.

2. You can adjust where the funding is distributed to. Upon changing the amount to \$0 and saving, the Remaining Amount will update:

▼ Measure Management

Assign Allocation

2021 DOE - Wx x 2021 LIHEAP - Wx x DSM x Other x Weatherization Ready x

Apply Clear Search Save C

<input type="checkbox"/>	Class Identify	Area Name	Measure Name	Invoice Status	Total Cost	Remaining Amount	2021 DOE - Wx	2021 LIHEAP - Wx	DSM	Other	Weatherizati
<input type="checkbox"/>	Attic	Whole House	Attic Insulation-Blown Cellulose - R-49		\$960.65	\$0.00	240.16	240.16	240.16	240.17	
<input type="checkbox"/>	Health and Safety	Whole House	Smoke detector needed		\$92.00	\$46.00	23	23	0	0	
Total					\$1052.65	\$46.00	\$263.16	\$263.16	\$24...	\$240...	

Project Document List:

1. As in the Application, documents can be set using a multi-select of the document type, and status in the right corner. The only required document is 'QC Inspection Form', to edit it you will double click on the row:

Project Document List					
Document Type	Document Status	Received Date	Comment	Attached File Name	
<input type="checkbox"/>	WX 14 Agency/Contractor Agreement				
<input type="checkbox"/>	WX 15 Contractor Change Order				
<input type="checkbox"/>	WX 16 Contractor's Notice of Completion				
<input type="checkbox"/>	WX 16a Deficiency Notice, as applicable				
<input type="checkbox"/>	WX 17 Private Contractor's Invoice				
<input type="checkbox"/>	WX 710 Client Completion Form				
<input type="checkbox"/>	WX 910 Request to Exceed				
<input type="checkbox"/>	WX BLR				
<input type="checkbox"/>	WX Mold Assessment				
<input type="checkbox"/>	WX Rental				
<input type="checkbox"/>	EPA Approved Lead Paint Kit				
<input type="checkbox"/>	Lead Safe Documentation				
<input type="checkbox"/>	Worst-Case CAZ Form				
<input type="checkbox"/>	* QC Inspection Form				
<input type="checkbox"/>	ASHRAE Compliance Documentation				
<input type="checkbox"/>	Client Completion Form				
<input type="checkbox"/>	Confirmation statement for EPA Renovate Right				
<input type="checkbox"/>	Confirmation statement for H&S documents				
<input type="checkbox"/>	H&S Screening				
<input type="checkbox"/>	Heat System Inspection Form				
<input type="checkbox"/>	NEAT/MHEA Electronic version of audit				
<input type="checkbox"/>	NEAT/MHEA Generated Client Completion Report				
<input type="checkbox"/>	NEAT/MHEA Generated Work Order-Energy Systems				
<input type="checkbox"/>	NEAT/MHEA Generated Work Order-Regular WX				
<input type="checkbox"/>	NEAT/MHEA printout of recommended work measures				
<input type="checkbox"/>	Photographs (Before and after weatherization work)				
<input type="checkbox"/>	Section 106 Review (if applicable)				

2. Once you have attached the file, select 'Save'. You will then be able to view the document by selecting the link:

Document ✕

Document

Document Status*

Comment

Received Date

Attached File Name: SampleUpload.docx

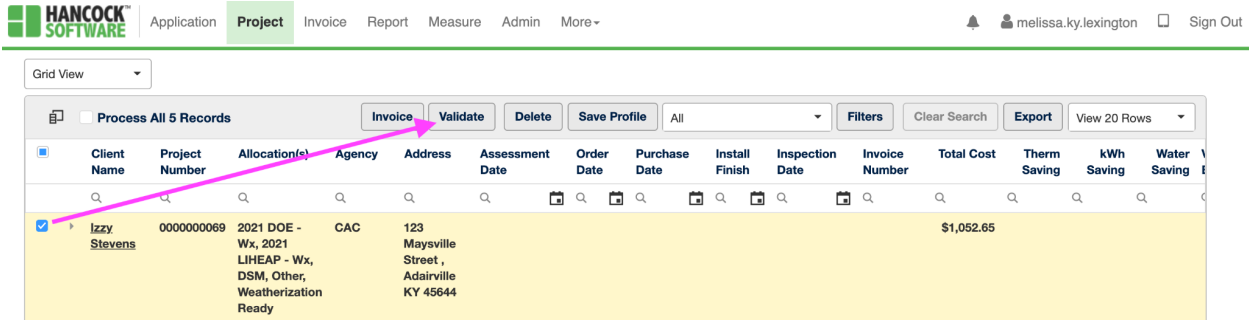
Remove Attachment
Attach Document
Save
Cancel

Project Document List					
	Document Type	Document Status	Received Date	Comment	Attached File Name
<input type="checkbox"/>	WX 14 Agency/Contractor Agreement	NotRequired	5/11/2021		
<input type="checkbox"/>	WX 15 Contractor Change Order	NotRequired	5/11/2021		
<input type="checkbox"/>	WX 16 Contractor's Notice of Completion	NotRequired	5/11/2021		
<input type="checkbox"/>	WX 16a Deficiency Notice, as applicable	NotRequired	5/11/2021		
<input type="checkbox"/>	WX 17 Private Contractor's Invoice	NotRequired	5/11/2021		
<input type="checkbox"/>	WX 710 Client Completion Form	NotRequired	5/11/2021		
<input type="checkbox"/>	WX 910 Request to Exceed	NotRequired	5/11/2021		
<input type="checkbox"/>	WX BLR	NotRequired	5/11/2021		
<input type="checkbox"/>	WX Mold Assessment	NotRequired	5/11/2021		
<input type="checkbox"/>	WX Rental	NotRequired	5/11/2021		
<input type="checkbox"/>	EPA Approved Lead Paint Kit	NotRequired	5/11/2021		
<input type="checkbox"/>	Lead Safe Documentation	NotRequired	5/11/2021		
<input type="checkbox"/>	Worst-Case CAZ Form	NotRequired	5/11/2021		
<input type="checkbox"/>	* QC Inspection Form	Completed	5/11/2021		SampleUpload.docx
<input type="checkbox"/>	ASHRAE Compliance Documentation	NotRequired	5/11/2021		

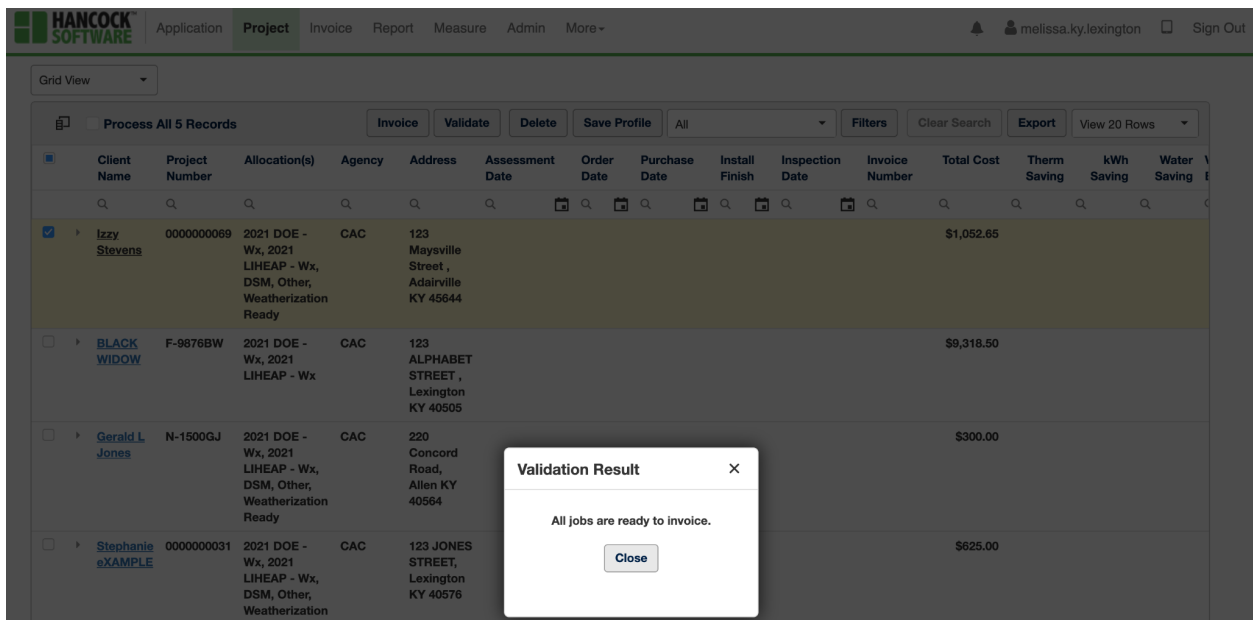
NOTE: If the QCI Form has been completed you can move on to Validate (see next section). If it hasn't and you are billing for in-progress jobs, you will get a Validation error but will still be able to create an Invoice. The state will be able to override the Validation error prior to submitting the invoice.

Validate:

1. Once you have completed the Project, select the row and 'Validate'

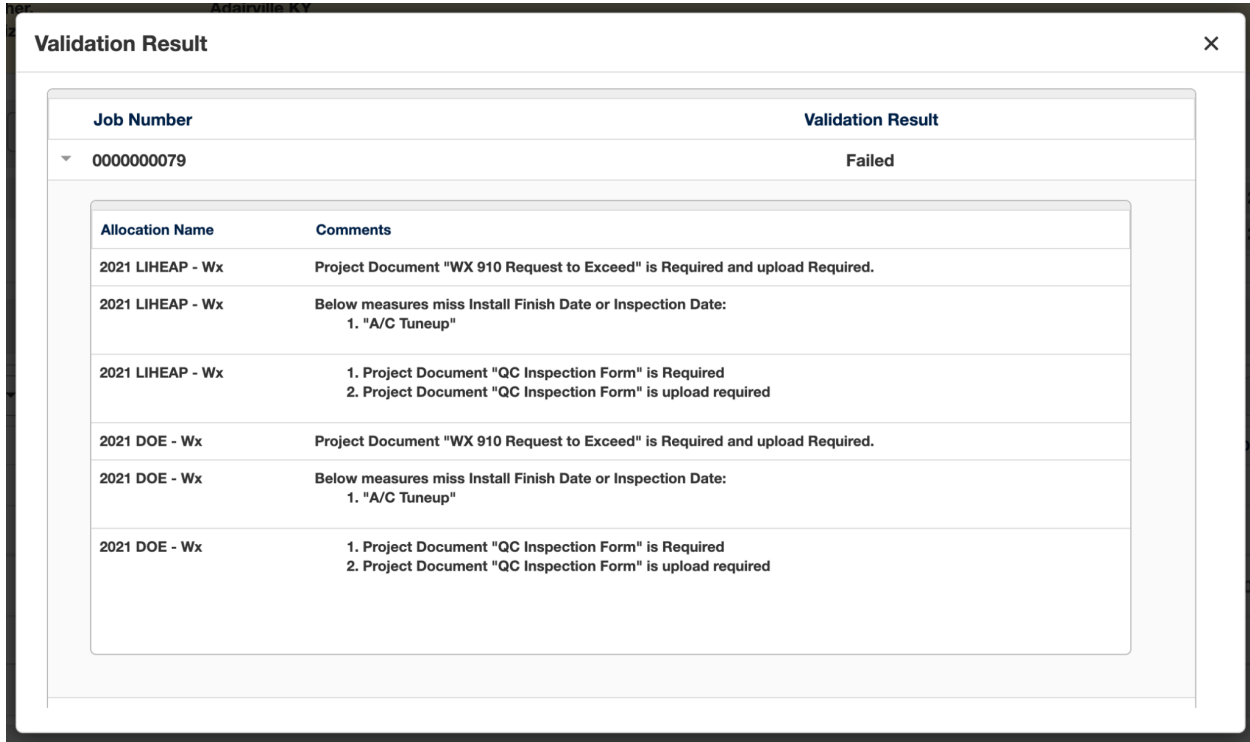


2. Should there be any errors a pop-up will generate letting you know what to correct. If everything is set you will be notified you are set to Invoice:



Possible Validation Errors

The following are possible errors you could encounter:



Job Number	Validation Result
000000079	Failed
Allocation Name	Comments
2021 LIHEAP - Wx	Project Document "WX 910 Request to Exceed" is Required and upload Required.
2021 LIHEAP - Wx	Below measures miss Install Finish Date or Inspection Date: 1. "A/C Tuneup"
2021 LIHEAP - Wx	1. Project Document "QC Inspection Form" is Required 2. Project Document "QC Inspection Form" is upload required
2021 DOE - Wx	Project Document "WX 910 Request to Exceed" is Required and upload Required.
2021 DOE - Wx	Below measures miss Install Finish Date or Inspection Date: 1. "A/C Tuneup"
2021 DOE - Wx	1. Project Document "QC Inspection Form" is Required 2. Project Document "QC Inspection Form" is upload required

NOTE: It will list the errors for each Allocation individually.

Project Document "WX 910 Request to Exceed" is Required and upload Required:

To correct this you will need to upload the 'WX 910 Request to Exceed' document

▼ Project Document List

Document Type	Document Status	Received Date	Comment	Attached File Name
<input type="checkbox"/> WX 14 Agency/Contractor Agreement				
<input type="checkbox"/> WX 15 Contractor Change Order				
<input type="checkbox"/> WX 16 Contractor's Notice of Completion				
<input type="checkbox"/> WX 16a Deficiency Notice, as applicable				
<input type="checkbox"/> WX 17 Private Contractor's Invoice				
<input type="checkbox"/> WX 710 Client Completion Form				
<input type="checkbox"/> WX 910 Request to Exceed				
<input type="checkbox"/> WX BLR				

Below measures miss Install Finish Date or Inspection Date:

▼ Measure Management

Detail	Area	Existing Item	Class Identify	Measure Name	Measure Unit	Qty	Unit Cost(\$)	Material Cost	Labor Cost	Total Cost	Contractor	Inspector	Order Date	Installer	Install Finish
<input checked="" type="checkbox"/>	Whole House		HVAC Cooling System	A/C Tuneup	Each	1	25000	\$25,000.00	\$1,000.00	\$26,000.00					

1. Project Document "QC Inspection Form" is Required
2. Project Document "QC Inspection Form" is upload required

▼ Project Document List

Document Type	Document Status	Received Date	Comment	Attached File Name
<input type="checkbox"/> WX 14 Agency/Contractor Agreement				
<input type="checkbox"/> WX 15 Contractor Change Order				
<input type="checkbox"/> WX 16 Contractor's Notice of Completion				
<input type="checkbox"/> WX 16a Deficiency Notice, as applicable				
<input type="checkbox"/> WX 17 Private Contractor's Invoice				
<input type="checkbox"/> WX 710 Client Completion Form				
<input type="checkbox"/> WX 910 Request to Exceed				
<input type="checkbox"/> WX BLR				
<input type="checkbox"/> WX Mold Assessment				
<input type="checkbox"/> WX Rental				
<input type="checkbox"/> EPA Approved Lead Paint Kit				
<input type="checkbox"/> Lead Safe Documentation				
<input type="checkbox"/> Worst-Case CAZ Form				
<input type="checkbox"/> * QC Inspection Form				
<input type="checkbox"/> ASHRAE Compliance Documentation				
<input type="checkbox"/> Client Completion Form				