



WRF: Deferral Tracking Best Practices. April 30, 2024



N A S C S P

NATIONAL ASSOCIATION FOR STATE COMMUNITY SERVICES PROGRAMS



Agenda

- Introductions
- WRF: History, Guidance, Resources
- WRF Reporting requirements
- Deferral Tracking, WRF Reporting Demonstrations:
 - Toni Broome-Smith: Hancock Energy Software Demo
 - Phil Crow: WisWAP Demo
 - Travis Ekenberg: Optimizer Demo
- Q&A

**Toni Broome-Smith, VT
Hancock Energy Software**

**Phil Crow, WI
WisWAP**

**Travis Ekenberg, AZ
Optimiser**

Jonathan Ballew, NASCSP





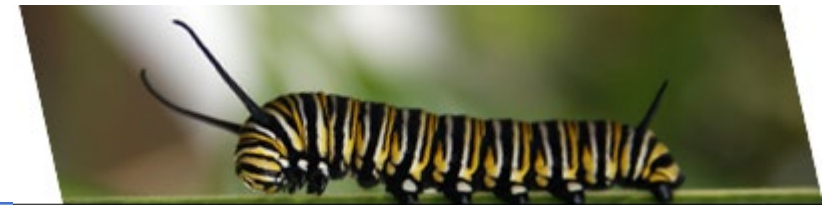
Weatherization Readiness Funds (WRF)

- WPN 22-6
- [WPN 23-4](#)
- WRF funds to be used to address deferral conditions and bring units into WX Ready state.
- Distributed in formula funds like T&TA funds, will not impact traditional ACPU. WRF allocation listed in WPN XX-2

What is a Deferral?

When a WAP eligible home has certain occupant issues or dwelling conditions that prohibit weatherization services from moving forward until the conditions are resolved.

Some deferrals can be fixed, some cannot



Deferral Process and WRF Plan required in Annual Plan ([V.1.2 Box 5](#))



Consolidated Appropriations Act, 2022

- Language in appropriators report creating and funding WRF
- WRF is not a part of the WAP Reauthorization

Weatherization Readiness Funding

- \$15M appropriated in PY '22
- \$30M appropriated in PY '23
 - Allocations in [WPN 23-2](#)
- \$30M appropriated in PY '24
- Requirements
 - WRF Plan
 - Track Funds
 - Monitor
- [NASCSP/DOE WRF Webinar](#)

State	FY 2023 Program Allocation	FY 2023 T&TA Allocation	FY 2023 Total Allocation	FY 2023 Readiness Fund
Alabama	\$2,785,126	\$609,162	\$3,394,288	\$357,188
Alaska	\$1,844,907	\$420,397	\$2,265,304	\$253,486
Arizona	\$1,936,680	\$438,822	\$2,375,502	\$263,608
Arkansas	\$2,203,925	\$492,476	\$2,696,401	\$293,084
California	\$7,435,566	\$1,542,818	\$8,978,384	\$870,114
Colorado	\$5,698,267	\$1,194,025	\$6,892,292	\$678,496
Connecticut	\$2,996,244	\$651,548	\$3,647,792	\$380,474
Delaware	\$652,802	\$181,061	\$833,863	\$122,001
District of Columbia	\$603,026	\$171,068	\$774,094	\$116,511
Florida	\$3,103,745	\$673,130	\$3,776,875	\$392,331
Georgia	\$3,917,626	\$836,531	\$4,754,157	\$482,099
Hawaii	\$207,122	\$91,583	\$298,705	\$72,845
Idaho	\$2,057,564	\$463,091	\$2,520,655	\$276,941
Illinois	\$14,337,411	\$2,928,482	\$17,265,893	\$1,631,360
Indiana	\$7,283,994	\$1,512,387	\$8,796,381	\$853,396
Iowa	\$5,042,431	\$1,062,355	\$6,104,786	\$606,160
Kansas	\$2,673,077	\$586,666	\$3,259,743	\$344,830
Kentucky	\$4,816,099	\$1,016,915	\$5,833,014	\$581,197
Louisiana	\$1,666,297	\$384,538	\$2,050,835	\$233,786
Maine	\$3,205,253	\$693,510	\$3,898,763	\$403,527
Maryland	\$3,057,092	\$663,764	\$3,720,856	\$387,185
Massachusetts	\$6,978,497	\$1,451,053	\$8,429,550	\$819,701
Michigan	\$16,597,459	\$3,382,225	\$19,979,684	\$1,880,634
Minnesota	\$10,012,063	\$2,060,094	\$12,072,157	\$1,154,291
Mississippi	\$1,769,046	\$405,166	\$2,174,212	\$245,119
Missouri	\$6,425,237	\$1,339,977	\$7,765,214	\$758,678
Montana	\$2,508,101	\$553,544	\$3,061,645	\$326,634
Nebraska	\$2,570,131	\$565,998	\$3,136,129	\$333,475
Nevada	\$1,193,787	\$289,673	\$1,483,460	\$181,670
New Hampshire	\$1,614,893	\$374,218	\$1,989,111	\$228,116
New Jersey	\$5,862,784	\$1,227,055	\$7,089,839	\$696,642
New Mexico	\$2,029,053	\$457,367	\$2,486,420	\$273,797
New York	\$22,155,886	\$4,498,175	\$26,654,061	\$2,493,707
North Carolina	\$5,033,819	\$1,060,626	\$6,094,445	\$605,210
North Dakota	\$2,421,799	\$536,218	\$2,958,017	\$317,115

WPN 22-6: Weatherization Readiness Fund (WRF) Guidelines

Released: April 14, 2022

Supersedes: N/A

Optional [DOE Deferral Tracking Spreadsheet](#)

Requirements:

- Grantee to develop WRF Plan for DOE approval
 - Grantee to define whether an ACPU or cost cap per home
 - Grantee defines the amount in either case!
- Grantee must track each building/unit and costs (T&TA, Monitoring and Leveraging Report)
- Grantee must monitor these funds as part of annual Subgrantee monitoring
- WRF expenditure must result in DOE Completion

WPN 23-4: Weatherization Readiness Funds – Expansion of Scope

Released: April 14, 2022

Supersedes: WPN 22-6

Optional [DOE Deferral Tracking Spreadsheet](#)

Requirements:

- WRF are allowed to be carried forward into next budget period (within same grant cycle)
- The use of WRF does not need to result in a DOE-funded completion within the same PY but must be completed w/in same grant cycle and within a reasonable time
 - Grantees to define 'reasonable time'
- WRF funds are allowed to be utilized on formula-funded **AND** BIL-funded Wx projects



Poll:

Who can track deferrals at the statewide level?

- A. Yes, we have statewide data in our DMS**
- B. Almost, we are implementing/updating DMS**
- C. No, tracked at the Agency level**
- D. Not tracked at all**

WRF Reporting

PY23 reporting to be completed in narrative form as part of the T&TA, Monitoring and Leveraging Report

- Reporting Requirements per [WPN 23-4](#)
 - Year built
 - Housing type: Site-built single family, manufactured, multifamily
 - Nature of repair(s)
 - DOE WRF expenditure per unit
 - Leveraged funds used

[Optional Deferral Classification Guide and Tracker](#)

Unit Information:		DATE INFO			MAILING INFO		BUILDING INFO	
Unit ID	WAP Intake Date	Date(s) Deferred (if previously deferred by WAP)	Date Weatherization Ready	Date Weatherized	Street, City, State, Etc.	Building Type	Year Built	Fuel Type
Issue Specific Information:								
Issue or Action Needed	WRF Category	DEFERRAL ISSUE 1		Total Remediation Cost		Non-WAP Funding Source Used		WRF Funds Applied



WAP Memo 111

- Quarterly Performance Report
 - # WRF units
- Annual T&TA, Monitoring, and Leveraging Report
 - Items listed in WPN 23-4

WRF Success Stories

Success Story submissions





Poll:

Will you submit a WRF Success Story?

A. Yes, I can pull that off!

B. Maybe, I can put the word out

C. Nah, my plate is full

WRF Resources

- WRF Plans
- Resources

More coming soon!



WAP Member-Only Resources f t in

Browse NASCSP's library of member only resources.

- WAP COVID Resources
- Grantee Survey Data
- Webinars
- Workforce Development
- Weatherization Readiness
- State Plans

Weatherization Readiness Fund (WRF) Toolkit



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Training
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Sample WRF Plans



Poll:

What policy changes were necessary to track and report on WRF/Deferrals?



WRF Best Practices

- Build in flexibility
 - ACPU favored over cost cap
 - Flexible language
 - “not an exhaustive list”
 - “waiver to expenditure limits can be requested”
- Mind your carryover! Grant cycle ends PY '24

WRF Best Practices

- Educate Intake Staff
 - Process mapping
- WRF can be used with BIL funds
- Use existing contractors when possible
- Municipal inspections





VERMONT

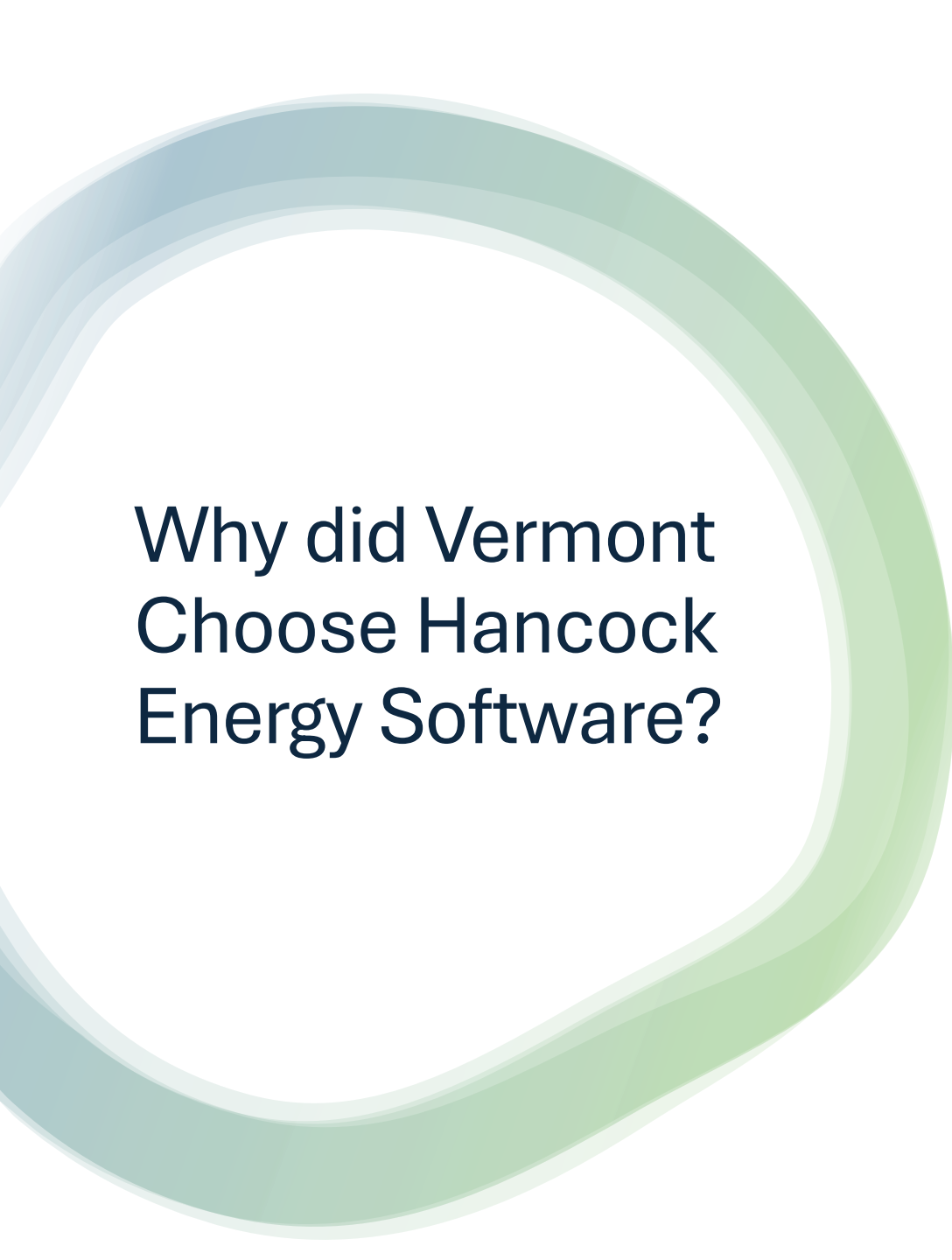
DEPARTMENT FOR CHILDREN & FAMILIES
OFFICE OF ECONOMIC OPPORTUNITY

Tracking Weatherization Deferrals in Vermont
Hancock Energy Software



Who Uses HES?

In Vermont's six regional Weatherization agencies, every staff member in an administrative position utilizes the system. This includes everyone from Intake staff to Program Directors.



Why did Vermont Choose Hancock Energy Software?

- For many years Vermont WX used WDMS, a Microsoft Access based data tracking system developed by State IT. Each month agencies would mail in a disc with monthly reports
- Eventually the person who developed the system left and the system was not being maintained. This and the addition of multiple new funding sources necessitated the need for a new system.
- VT did not have the expertise to create our own database and wanted a quicker delivery than having one created would entail.
- Hancock Energy Software was chosen because they were agreeable to modify to our needs.
- VT is a crew-based program, HES is originally a subcontractor-based program.
- HES was open to the challenge of modifying the program to accommodate a crew-based program and in creating a FIFO based Inventory.
- Working with HES during the modifications was a full-time job for one of VT staff to manage the process.

Entering a Deferral in HES

Site Assessment

Copy Job From

First Name	Russell	Last Name	Morgan
WAP Priority	17	Agency	Northeast Employment and Training Organization South
Job Number*	<input type="text" value="WX-15-598"/>	Auditor	<input type="text" value="Jeff Smith"/>
Job Type*	<input type="text" value="Weatherization"/>	Job Status*	<input type="text" value="Deferred"/>
Assessment Date*	<input type="text" value="02/27/2024"/>		
Complete Date	None	Efficiency Coach*	<input type="text" value="zz-Gordon Smith"/>
Audit Type	<input type="text" value="Quick Audit"/>	Coaching Date	<input type="text" value="03/04/2016"/>
<input type="checkbox"/> Need Approval			
<input checked="" type="checkbox"/> Deferred	Deferred Date*	<input type="text" value="02/27/2024"/>	
	Reason*	<input type="checkbox"/> A Deferral w/ no Path Forward	
		<input checked="" type="checkbox"/> A Deferral w/ Path Forward	
		<input type="checkbox"/> Building is a Camp/Seasonal Use	
		<input type="checkbox"/> Building is Condemned	
<input checked="" type="checkbox"/> Deferral Resolved	Deferral Resolution Date	<input type="text" value="02/27/2024"/>	

Tier

Entering a Deferral in HES

Working with HES, VT created two Deferral classifications:



1. Deferral with Path Forward
2. Deferral with no Path Forward

Once the Deferred box on the Audit Information screen is selected, a dropdown pick list appears. This list contains the types of deferrals and a long list of reasons a job could be deferred, multiple reasons can be selected.

If a job is deemed Deferred with no Path Forward, the job will be closed using the appropriate No Unit funding source.

If Deferral with Path Forward is selected, once all barriers to Wx are removed, Deferral Resolved will be selected and the date entered. Once all barriers are removed the job will move forward through the Wx process. (The reasons for Deferral will remain checked)

HES Job List

Deferred 	Deferred Date  	Deferred Reason 	Deferral Resolved 	Deferral Resolution Date 
	 			 
Yes	4/29/2024	A Deferral w/ no Path Forward, Client Doesn't Want Wx Job Started, Client Refused Services During Job, Repeat Cancellations/No Shows	No	

Deferral Resolved

Deferred 	Deferred Date 	Deferred Reason 	Deferral Resolved 	Deferral Resolution Date
				
Yes	6/12/2023	Other, A Deferral w/ Path Forward	Yes	4/19/2024
Yes	6/30/2021		Yes	8/30/2023
Yes	5/9/2023	A Deferral w/ Path Forward, Vermiculite	Yes	5/9/2023



WRF Webinar

Deferrals

Wisconsin Weatherization
Assistance Program



WHEAP Reports

- Program Operations**
- Contact Group List for Broadcasts
 - Crisis Benefit Balances
 - Data Dictionary
 - Demographics
 - Denied Crisis
 - Denied Incomplete Outreach Report
 - Extraction Ready Payments
 - Federal Household
 - Fixed Income List
 - Outreach
 - Outreach Type
 - Pending or On Hold Application List
 - Performance Measurements Report
 - Program Service By WHEAP Agency
 - Vendor Payment Register
 - WHEAP Application View Permissions
 - WHEAP Congress District
 - WRAP Detail
 - WRAP Status

- Fiscal**
- Check Log Report
 - Contract Detail Report
 - Contract Payment Extraction Detail Report
 - Cumulative Expenses Report
 - Deposit Transmittal STAR
 - Extraction Benefit Details
 - HEPlusTransactions
 - Manual Warrant
 - Reconciliation
 - TANFReport
 - WHEAP Payments Owed Report
 - WHEAP Refunds

- Vendor**
- Commitment to Community
 - Query Vendor Data
 - WHEAP Vendor Details

- Public**
- Direct Benefits Caseload Comparison
 - Payments And Services



● Manage Reports

● Create Client List

Actions

Actions

WISWAP Reports

Fiscal

- Average Invoice Cost Per Unit
- Expenditure Detail by Grantee
- Expenditure Summary by Fund
- Interest Income Allocation

Building and Units

- Building and Unit Counts
- DOE Quarterly Report
- Monthly Production Vs Contract Plan
- Reasons Deferred Report
- Weatherization Unit Duration Report
- Weatherization Unit Status Report
- WXDemographics Report

Job Costing

- Average Cost Per Measure
- Contract Planning
- DOE Average Cost Per Unit
- Funds Remaining
- Grantee Measure Defaults
- Measure Cost Details Report
- Measure Exception Report
- Operations and Health Safety Costs
- Unit Counts by Fund
- Unit Measure Frequency And Average Cost
- Wx Readiness

Quality Assurance

- QAInspection Status Report

WISWAP Reports

Fiscal

- Average Invoice Cost Per Unit
- Expenditure Detail by Grantee
- Expenditure Summary by Fund
- Interest Income Allocation

Building and

- Building and
- DOE Quart
- Monthly Pr
- Plan
- Reasons D
- Weatheriza
- Report
- Weatheriza
- WXDemogr

Reasons Deferred Criteria

Reasons Deferred Report Criteria

Search Criteria

Business	State Of Wisconsin - 99 X	County	None Selected
Housing Types	None Selected	Deferral Reasons	None Selected
Deferral Date From	07/01/2023	Deferral Date To	04/24/2024
Deferral Correction Date From		Deferral Correction Date To	
Building Status	Deferred X	Ownership Type	None Selected
City			

Show Report

Reasons Deferred Report

Grantee Name :State of Wisconsin

Report Run Date: 4/24/2024

BuildingStatus :Deferred

Deferral Date From: 7/1/2023 to 4/24/2024

Statewide Totals

Reason Deferred	#Units Deferred	% of Total Units Deferred
Building is For Sale or in Foreclosure	32	1.01%
Chemical or Combustion Hazard	13	0.41%
Clutter/Restricted Access to Work Area	320	10.13%
Lead Paint Hazard	4	0.13%
Moisture/Mold	142	4.49%
No Treatment	230	7.28%
Other	679	21.49%
Possible Asbestos Containing Material	39	1.23%
Refused/Unable to Pay Contribution	42	1.33%
Remodeling	94	2.97%
Repair	431	13.64%
Service Declined by Customer/Owner	427	13.51%
Sewage/Animal Feces	87	2.75%
SIR<1	489	15.47%
Vermin/Pests	131	4.15%
Total # of Units with Deferral Reason	2,452	
Total # of Deferred Units with Multiple Reasons Deferred	450	
Total # of Deferred Units Corrected - Weatherized	41	

Reasons Deferred Report

Grantee Name:

Report Run Date: 4/24/2024

Building Status :Deferred

Deferral Date From: 7/1/2023 to 4/24/2024

Building ID	Number of Units	Building Status	City	County	Date Deferred	Correction due date	Correction date	Deferral note	Reason Deferred
15067	1	Deferred	[Redacted]	[Redacted]	3/12/2024			No cost effective ECM's to complete	No Treatment
36923	1	Deferred			1/30/2024			Baseload Freezer Only	No Treatment
65828	1	Deferred			11/8/2023	2/8/2024		Needs to clear out crawlspace	Clutter/Restricted Access to Work Area
116021	1	Deferred			11/8/2023			No cost effective ECM's to complete	No Treatment
118064	1	Deferred			12/12/2023	2/15/2024		Sewage, entire 2nd story needs drywall, no response to calls.	Other Repair Sewage/Animal Feces
137690	1	Deferred			1/12/2024			No cost effective ECM's to complete	No Treatment
145542	1	Deferred			10/17/2023			No cost effective ECM's to complete	No Treatment
200515	1	Deferred			7/24/2023	10/7/2023		Clutter needs to be removed. Client cannot move things until knee surgery is healed.	Clutter/Restricted Access to Work Area
204866	1	Deferred			12/19/2023			Owner declined WH conversion due to necessary ceiling demo to complete. Drops SIR <1	Service Declined by Customer/Owner SIR<1
205243	1	Deferred			2/27/2024	5/27/2024		Client's daughter is blocking work being completed.	Service Declined by Customer/Owner
205296	1	Deferred			12/1/2023	3/3/2024		Need to be able to have electricians do K&T removal	Clutter/Restricted Access to Work Area
205443	1	Deferred			10/5/2023	11/20/2023		Client needs dumpster to remove clutter from home. With his current health he is unable to do so right now.	Clutter/Restricted Access to Work Area
205539	1	Deferred			8/3/2023			Not responding to <input type="text"/> or <input type="text"/>	Service Declined by Customer/Owner
206396	1	Deferred			3/1/2024	5/1/2024		Bats	Vermin/Pests

Questions





AZ WEATHERIZATION ASSISTANCE PROGRAM SOFTWARE SUITE

DEVELOPED BY **NEXUS OPTIMISER**


ARIZONA DEPARTMENT OF HOUSING

TRAVIS EKENBERG
WEATHERIZATION PROGRAM MANAGER
TRAVIS.EKENBERG@AZHOUSING.GOV
602.771.1071

NEXUS/OPTIMISER LOGIN PAGE



 Username

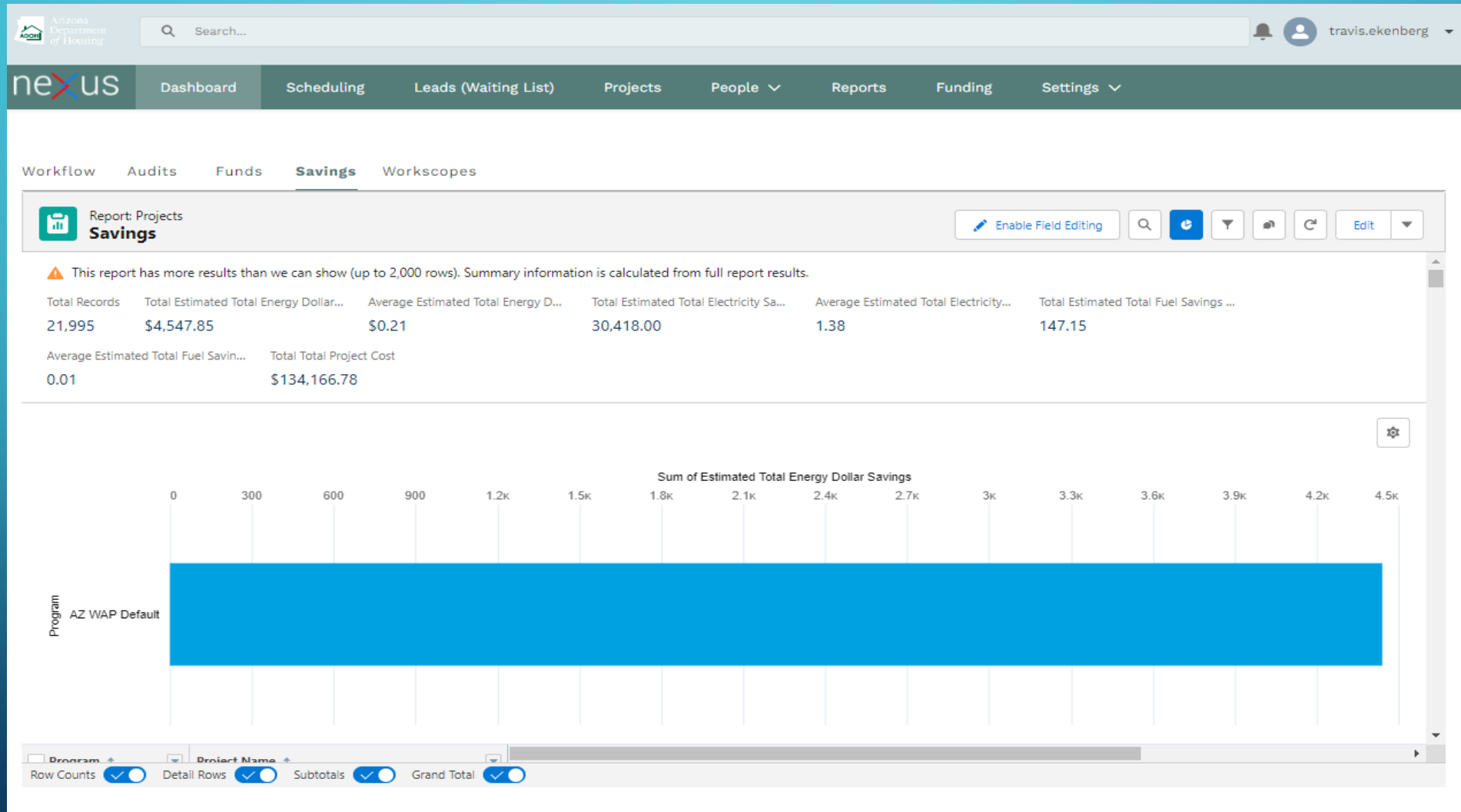
 Password

Log In

[Forgot your password?](#)

[Are you an employee? Login here.](#)

NEXUS/OPTIMISER DASHBOARD



INTAKE/CLIENT QUALIFICATION SECTION (NEXUS DATABASE/CLIENT FILE)

The screenshot shows the Nexus database interface for a project. At the top, there is a search bar and a user profile for Travis Ekenberg. The navigation menu includes Dashboard, Scheduling, Leads (Waiting List), Projects, People, Reports, Funding, and Settings. The main content area displays project details for 'Rogers@Phoenix 4120 East Roma Avenue'. A progress bar shows the current stage as 'Audit & Proposed Workscope'. Below this, there are tabs for Details, Activity, Occupants, Notes & Files, Feed, and Other. The Details tab is active, showing fields for Primary Contact (Buck Rodgers), Days Since Audit (92), Key (P-11966), Program (AZ WAP Default), Project Owner (Travis Ekenberg), Created By (Travis Ekenberg), Comments (Back Bedroom is hot in the Summer), Auditor Account / Agency (Arizona Department of Housing), Project Status (Active), Status Reason, Project Status Notes, External ID (AZ12182023), Primary Campaign Source, Prevent Task Notifications, Contractors Paid, and Subgrantee Reimbursed.

Arizona Department of Housing

Search...

travis.ekenberg

nexus Dashboard Scheduling Leads (Waiting List) Projects People Reports Funding Settings

Project Rogers@Phoenix 4120 East Roma Avenue

+ Follow Forms Optimiser Workscope

Account Name: Rogers@Phoenix 4120 East Roma Avenue
Estimated Completion Date: 12/31/2023
Amount: \$29,839.00
Project Owner: Travis Ekenberg

Audit & Proposed Workscope Workscope Approval Installation Final Inspection / QC Funding Allocation Job Completion Review Complete

Details Activity Occupants Notes & Files Feed Other

Primary Contact: Buck Rodgers
Days Since Audit: 92
Key: P-11966
Program: AZ WAP Default
Project Owner: Travis Ekenberg [Change]
Created By: Travis Ekenberg, 12/18/2023 10:14 AM
Comments: Back Bedroom is hot in the Summer

Auditor Account / Agency: Arizona Department of Housing
Project Status: Active
Status Reason
Project Status Notes
External ID: AZ12182023
Primary Campaign Source
Prevent Task Notifications
Contractors Paid
Subgrantee Reimbursed

▼ Audit

AUDIT AND IMPROVEMENTS SECTION, FINAL AND QCI SECTION, INCLUDING IN-PROCESS ENERGY MODELING, ASHRAE CALCULATION, AND HVAC SIZING BASED OFF OF HEATING AND COOLING LOADS

OptiMiser

Calculate

Customer

Agency Info

Building

Multi-Family

Window Type

Exterior Door

Refrigerator

Freezer

Dishwasher

Clothes Washer

Kitchen/Range

Dryer

Bathroom

Thermostat

HVAC

Delivery

Room Pressure Test

Rodgers@Phoenix 4120 East Roma Avenue

Data Sync

Base Building Health & Safety Improvements Notes Photos Test-Out QC

HVAC

* HVAC Type ⓘ
Heating & Cooling Upgraded Together

Heating System

% Heating ⓘ
100

* Heating Fuel ⓘ
Gas

* Heating System Type ⓘ
Furnace

Heating System ⓘ
Generic 1992-2007

Inverter/VSD ⓘ

Capacity Unit ⓘ
kBtu/h

Heating Capacity ⓘ
65

Efficiency Unit
AFUE

Heating Efficiency ⓘ
78

Calibrate Efficiency? ⓘ

Heating System Condition
Poor

Cooling System

% Cooling ⓘ
100

Cooling System Type ⓘ
Central Air Conditioner

Cooling System ⓘ
Generic 1992-2005

Inverter/VSD ⓘ

ENERGY MODELING/IMPROVEMENT ANALYSIS TABLE WITH MULTIPLE INFORMATION AND DATA OPTIONS

OptiMiser

Calculate

- Customer
- Agency Info
- Building
- Multi-Family
- Window Type
- Exterior Door
- Refrigerator
- Freezer
- Dishwasher
- Clothes Washer
- Kitchen/Range
- Dryer
- Bathroom
- Thermostat
- HVAC
- Delivery

📍 Rodgers@Phoenix 4120 East Roma Avenue Tables ▾ ↕ Sync ⋮

Cost Table ▾

Show 25 entries Search:

Improvements	Base	Improved	Selected Energy Improvements	CO2 Saved MT/Yr	% CO2 Saved	Cost	Life (Yrs)	SIR	Other
Insulate attic	R=5.0	R=0.0	Increase attic insulation and coverage to save energy and increase comfort.	-1.2	-10.2%	\$3,800	30	<0	
Air seal / vent	1545 CFM	1468 CFM	Reduce air leaks and weatherstrip doors to save energy and increase comfort.	-0.4	-3.4%	\$500	10	<0	
Doors	U=0.52	U=0.52	Add storm door(s) or install new door(s) to save energy and increase comfort.	-	-	\$2,402	20	.0	
Windows	U=1.10, SHGC=.75	U=1.10, SHGC=.75	Add storm windows or install new windows to save energy and increase comfort.	0.5	4.1%	\$1,350	10	2.7	
Duct/Pipe Eff	Eff=68%	Eff=87%	Seal or insulate your ducts or boiler pipes to save energy.	1.6	13.6%	\$2,600	19	4.3	
Heating + Cooling	78% Eff, 10 SEER	80% Eff, 16 SEER2	Improve the efficiency of your heating and cooling system to save energy.	2	0	\$11,407	18	.9	
Lighting	0 CFLs, 0 LEDs	0 CFLs, 10 LEDs	Replace incandescent lights with CFLs or LEDs to save energy and replacement costs.	0.2	2.1%	\$70	12	14.8	
Refrigerator	5,475 kWh	460 kWh	Replace your old refrigerator(s) with more efficient refrigerator(s) to save energy.	2.9	24.5%	\$2,460	15	6.4	
Hot water temp /			Lower your hot water temperature to reduce energy losses and						

Showing 1 to 18 of 18 entries Previous 1 Next

Columns: - Rank - **Improvements** - **Base** - **Improved** - **Selected Energy Improvements** - Fuel Therm Saved - % Therm Saved - Elec kWh / Yr - kWh Saved - % kWh Saved - Energy Saved MBtu - % Energy Saved - **CO2 Saved MT/Yr** - **% CO2 Saved** - **Cost** - Incentive #1 - Incentive #2 - Incentive #3 - Incentive #4 - Incentive #5 - Net Cost - Save Year 1 - Cash Flow - Monthly Cash Flow - Pay Back Year - **Life (Yrs)** - **SIR** - Fuel Save / Yr (\$) - Electric Save / Yr (\$) - Cost Save / Yr (%) - Heating kWh Saved (kWh/Yr) - Cooling kWh Saved (kWh/Yr) - Heating Elec \$ Saved (\$/Yr) - Cooling Elec \$ Saved (\$/Yr) - **OtherCost** - CustomRowHide

FUNDING ALLOCATION WITH ADJUSTED SIRS AND CO-LEVERAGING OF MULTIPLE FUND STREAMS INCLUDED

Arizona Department of Housing

travis.ekenberg

nexus
Dashboard
Scheduling
Leads (Waiting List)
Projects
People
Reports
Funding
Settings

Project Workscope for Rodgers@Phoenix 4120 East Roma Avenue

Funding Accounts

Non-ECM
 ECM

Funds Only

All
 LIHEAP + ...
 CDBG
 DOE, LIHE...

Edit Filters

LIHEAP
 DOE BIL H&S
 DOE BIL PROG
 SRP H&S
 SRP PROG
 SRP R&R
 SWG
 SWG H&S

Elec Utility: SRP Fuel Utility: SWG Total Cost: 29,839.00 Total Funded Cost: 29,839.00

Measure	Unit	Qty	SIR	Adj S...	Est ...	Cost	Fund...	LIHE...	DOE ...	DOE ...	SRP ...	SRP ...	SRP ...	SWG...	SWG...
Agency Info			-	-	2200....	2200....	2200....	0.00	-	2139.49	-	53.08	-	7.43	-
Windows			1.29	1.29	1350.00	1350.00	1350.00	0.00	-	1289.92	-	60.08	-	-	-
Exterior Doors			-	-	2402....	2402....	2402....	2402....	-	-	-	-	-	-	-
Refrigerator			5.26	5.30	2460....	2460....	2460....	0.00	-	2333.21	-	108.68	18.11	-	-
Dryer			-	-	258.00	258.00	258.00	0.00	231.07	-	24.05	-	-	-	2.88
HVAC			0.29	1.01	11407....	11407....	11407....	8098....	-	3118.24	-	145.25	24.21	20.33	-
Delivery			1.91	1.92	2600....	2600....	2600....	0.00	-	2468....	-	115.00	-	16.10	-
CAZ Pressures			-	-	200.00	200.00	200.00	0.00	179.12	-	18.64	-	-	-	2.24
Infiltration			<0	-	500.00	500.00	500.00	500.00	-	-	-	-	-	-	-
Ventilation			<0	-	860.00	860.00	860.00	0.00	770.22	-	80.17	-	-	-	9.61
DHW			999.00	-	1514.00	1514.00	1514.00	0.00	1495.35	-	-	-	-	-	18.65
Smoke & CO Detectors			-	-	218.00	218.00	218.00	0.00	195.24	-	20.32	-	-	-	2.44
Attics			2.20	2.21	3800....	3800....	3800....	0.00	-	3608....	-	168.08	-	23.53	-
Lighting			12.32	12.32	70.00	70.00	70.00	0.00	-	66.88	-	3.12	-	-	-
Total						29,83...	29,83...	11,00...	2,871...	15,02...	143.18	653.29	42.32	67.39	35.82

DEFERRAL REPORTS AND TRACKING

Arizona Department of Housing | Search... | travis.ekenberg

nexus | Dashboard | Scheduling | Leads (Waiting List) | Projects | People | Reports | Funding | Settings

Report: Leads with converted lead information
DQ and Abandoned Leads and Projects | Enable Field Editing | Add Chart | Edit

Total Records: 10

	Created Date	Last Modified Date	Converted Date	Oppt Close Date	First Name	Last Name	Single Line Address	Apartment/Unit/Lot	Lead Owner	Auditor
1	12/10/2023	12/11/2023	-	-	Travis	Ekenberg	1110 W Washington Street, Suite 280 Phoenix AZ 85007	-	Travis Ekenberg	Arizona
2	12/19/2023	12/19/2023	-	-	[REDACTED]	[REDACTED]	[REDACTED]	-	mayra.armenta	PIMA C
3	1/19/2024	1/19/2024	-	-	Johnny	Rocket Test	4120 East Sells Drive Phoenix AZ 85018	-	Travis Ekenberg	Arizona
4	2/12/2024	2/12/2024	-	-	Travis	Ekenberg	4125 East Sells Drive Phoenix AZ 85018	-	Travis Ekenberg	Arizona
5	2/21/2024	2/21/2024	-	-	Ryan	Moore	44 Grove Street Kennebunk ME 04043	-	andy	Arizona
6	4/16/2024	4/16/2024	-	-	Johnny	Test	1111 South Plaza Way 5 Flagstaff AZ 86001	5	andy	Arizona
7	4/25/2024	4/25/2024	-	-	[REDACTED]	[REDACTED]	[REDACTED]	-	ztrimble	FSL Tuc
8	4/25/2024	4/25/2024	-	-	[REDACTED]	[REDACTED]	[REDACTED]	-	ztrimble	FSL Tuc
9	4/25/2024	4/25/2024	-	-	[REDACTED]	[REDACTED]	[REDACTED]	-	ztrimble	FSL Tuc
10	4/29/2024	4/29/2024	-	-	[REDACTED]	[REDACTED]	[REDACTED]	-	ztrimble	FSL Tuc



Report: Leads with converted lead information

DQ and Abandoned Leads and Projects

Enable Field Editing



Add Chart



Edit

	Auditor Account / Agency	Lead Status	Status Reason	Status Notes	Project Status	Status Reason	Project Status Notes
1	Arizona Department of Housing	Abandoned	Unresponsive	Income qualification: household annual income=\$150000, qualification limit=\$49720	-	-	-
2	PIMA COUNTY	Disqualified	-	Income qualification: household annual income=\$70,000; qualification limit=\$29,160	-	-	-
3	Arizona Department of Housing	Disqualified	-	-	-	-	-
4	Arizona Department of Housing	Disqualified	-	Income qualification: household annual income=\$20,000; qualification limit=\$	-	-	-
5	Arizona Department of Housing	Disqualified	-	Income qualification: household annual income=\$10,000; qualification limit=\$	-	-	-
6	Arizona Department of Housing	Disqualified	-	-	-	-	-
7	FSL Tucson	Disqualified	Failed income qualification	Income qualification: household annual income=\$35,381.57; qualification limit=\$30,120	-	-	-
8	FSL Tucson	Disqualified	Failed income qualification	Income qualification: household annual income=\$69,511.68; qualification limit=\$51,640	-	-	-
9	FSL Tucson	Disqualified	Failed income qualification	Income qualification: household annual income=\$32,486.66; qualification limit=\$30,120	-	-	-
10	FSL Tucson	Disqualified	-	-	-	-	-



Lead Johnny Test

- + Follow
- Forms
- Create Project
- New Note

Address	Apartment/Unit/Lot	Phone	Created By	Electric Utility	Fuel Utility
1111 South Plaza Way Flagstaff, AZ 86001 United States	5		andy, 4/16/2024 6:49 AM	APS	



DETAILS OCCUPANTS NOTES/FILES ACTIVITY HISTORY FEED

Workflow Management

Auditor Account / Agency
Arizona Department of Housing

Lead Owner
andy

Comments

Lead Status
Disqualified

Status Reason

Status Notes

External ID

Customer

Name
Johnny Test

Phone
777-818-2242

Secondary Phone

Primary Language
English

Email
jtest@test.com

Email Opt Out

EXTENSIVE AD-HOC REPORTS



Search...

travis.ekenberg



- Dashboard
- Scheduling
- Leads (Waiting List)
- Projects
- People
- Reports
- Funding
- Settings

Reports

Recent

7 items

Search recent reports...

New Report



REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	DQ and Abandoned Leads ar		Nexus	Admin	4/29/2024, 6:29 AM	
Created by Me	Monthly Projects Review		Nexus	Admin	4/29/2024, 9:19 AM	
Private Reports	Travis' Project Report		Private Reports	Travis Ekenberg	12/12/2023, 10:27 AM	
All Reports	Savings		Nexus	Admin	4/8/2017, 4:49 PM	
FOLDERS	AFA with Total of Measure/P		Nexus	Admin	12/27/2023, 6:28 AM	
All Folders	IFA with Total of Measure / F		Nexus	Admin	11/29/2023, 5:02 AM	
Created by Me	Work Order / Application Su	All current work orders with related project and contact info.	Nexus		11/7/2019, 1:09 PM	
Shared with Me						
FAVORITES						
All Favorites						



Report: Projects

Monthly Projects Review

Enable Field Editing



Add Chart



Edit



Total Records

1

<input type="checkbox"/> Auditor Account / Agency ↑	Project Name	Amount	Created Date	Last Modified Date	Stage Name ↓	Zeus URL
<input type="checkbox"/> Arizona Department of Housing (1)	RodgersTravisTest@Phoenix 4120 East Roma Avenue	\$0.00	12/18/2023	4/29/2024	Job Completion Review	Launch Zeus
Subtotal						
Total (1)						

Row Counts



Detail Rows



Subtotals



Grand Total



Project RodgersTravisTest@Phoenix 4120 East Roma Avenue

+ Follow Forms Optimiser Workscope

Account Name: Rodgers@Phoenix 4120 East Roma Avenue
Estimated Completion Date: 12/31/2023
Amount: \$0.00
Project Owner: Travis Ekenberg



Details Activity Occupants Notes & Files Feed Other

Primary Contact: Buck Rodgers
Days Since Audit: 95
Key: P-11966
Program: AZ WAP Default
Project Owner: Travis Ekenberg
Created By: Travis Ekenberg, 12/18/2023 10:14 AM
Comments: Back Bedroom is hot in the Summer

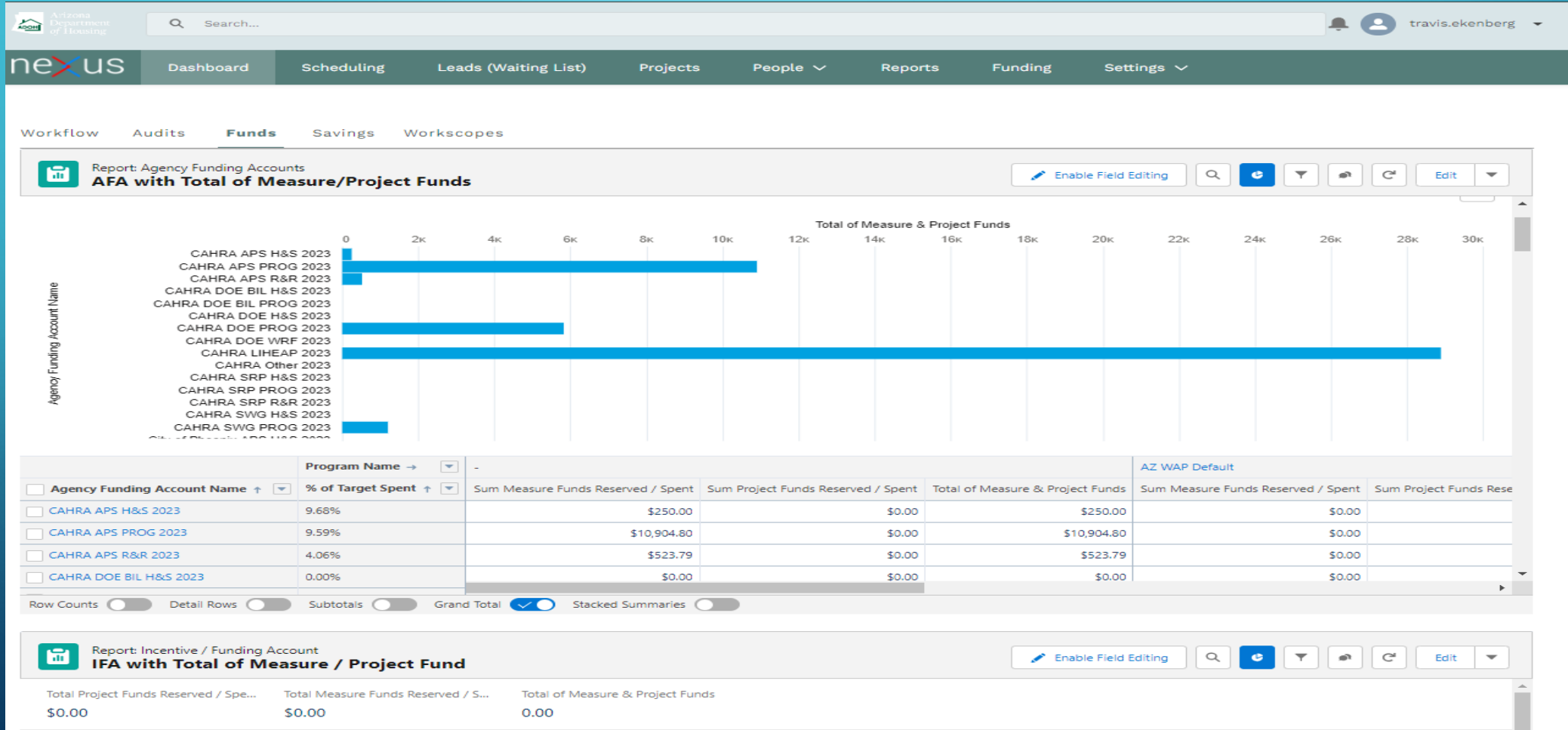
Auditor Account / Agency: Arizona Department of Housing
Project Status: Active
Status Reason
Project Status Notes
External ID: AZ12182023
Primary Campaign Source
Prevent Task Notifications
Contractors Paid
Subgrantee Reimbursed

Audit

Audit Date/Time: 1/25/2024 10:00 PM

Auditor: Travis Ekenberg

DASHBOARD/REAL-TIME PERFORMANCE TRACKING





Auditor Performance

As of Apr 29, 2024 4:02 PM-Viewing as Travis Ekenberg

+ Follow | Refresh

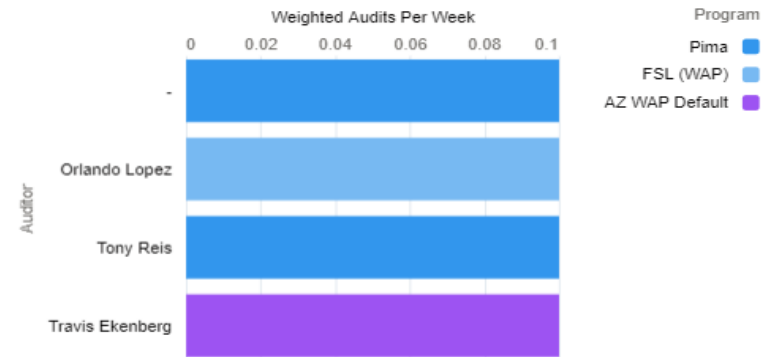
Audit Date/Time: All | Auditor: All

Audits By Auditor By Date Period

Audit Date Period	Auditor	Record Count
-	George Arambula	1
	Orlando Lopez	1
	Rosemarie Deck	1
	Tony Reis	1
	Subtotal	4
(1) Last 7 Days	Chris Minyard	1
	Subtotal	1
(3) This Calendar Year	-	1
	Orlando Lopez	2
	Tony Reis	1
	Travis Ekenberg	1
	Subtotal	5
Total		10

[View Report \(Audits By Auditor By Date Period\)](#)

Audits / Week To Date This Calendar Year



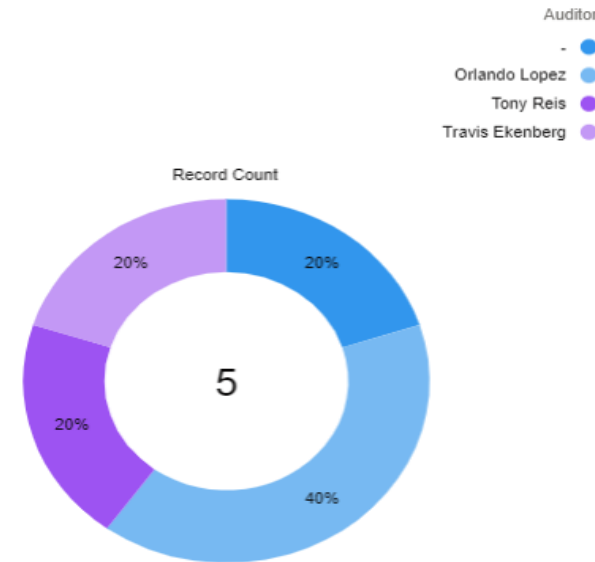
[View Report \(Audits By Auditor with Audits / Week\)](#)

Closeouts (jobs terminated at audit)

We can't draw this chart because there is no data.

[View Report \(Closeouts \(jobs terminated at audit\)\)](#)

Audits By Auditor This Calendar Year



[View Report \(Audits By Auditor with Audits / Week\)](#)



Report: Workscopes with Project

Work Order / Application Summary

All current work orders with related project and contact info.

Enable Field Editing



Add Chart



Edit



⚠ This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records	Total Total Cost	Total Project: Fuel Annual Consum...	Total Project: Electric Total Annual ...	Total Fuel Savings (Therms)	Total Electricity Savings (kWh)
10,764	\$8,454.38	0.00	0.00	9.16	14,806

Workscope: Work Order ID ↓ Project: Project Name ↓ Status ↓ Project: Program ↓ Project: Primary Contact ↓ Project: Primary Phone ↓ Project: Primary Contact Email ↓ F

USER MANUAL IN HELP SECTION AND REAL-TIME ERROR REPORTING





Questions



Thank you

- Webinar will be loaded [here](#)
- [Toni Broome-Smith](#)
- [Phil Crow](#)
- [Travis Ekenberg](#)
- [Jonathan Ballew](#)

