AUDIT DATA COLLECTION FORM

Client Name:	HH#
Address: City:	Phone 1: Phone 2:

Audit Date:	Auditor:	Temp In:	Out:

Dwelling characteristics

Year Built:	# Conditioned Stories:	Total square feet:
Comments:		

1. Year Dwelling Constructed	
2. Any remodeling? Where? What year?	
3. # people living in home?	
4. Daytime Tstat setting?	
5. Nighttime Tstat setting?	
6. Existing setback?	
7. Setback properly used?	
8. Client comfort, list cold room, warm rooms, etc.	
9. Supply/returns in cold rooms?	
10. Basement used as living space?	
11. Basement temp during winter?	
12. Attic use: Living, storage, etc.	
13. Will attic use affect insulation?	
14. Rooms closed off during winter?	
15. Age of furnace/boiler?	
16. Describe repairs in last 3 years.	
17. Routine maintenance? Yes/no	
18. Describe routine maintenance.	
19. Do you change filters? How often?	
20. How old is your water tank?	
21. Routine maintenance? Yes/no	
22. Icicles or ice dams in winter? Explain.	
23. Water in basement/crawlspace?	
24. Evidence of moisture/mold?	
25. Freezing pipes?	
26. Recurring headaches, itching/burning eyes?	
27. Roof leaks?	
28. Plans for remodeling?	
29. Homeschooled children? Daycare?	
30. Crawlspace used for storage?	
31. Other problems?	
32. Area of most concern that could possibly be addressed?	

Building Shell-Walls

Wall Type 1

Wall Type:	Stud Size:	Exterior Type:	Exposed to:	Existing Insul:
☐ Balloon	☐ 2x2	☐ Wood	☐ Outside	☐ Cell Blown
☐ Platform	☐ 2x3	☐ Metal/Vinyl	☐ Buffered	☐ FG Blown
☐ Masonry	☐ 2x4	☐ Stucco		☐ Rockwool
☐ Block	☐ 2x6	☐ Brick/Stone	**Existing R-Value:**	☐ Batts FG
☐ Other	☐ 2x8	☐ Other		☐ Polystyrene
				☐ Other

Wall Codes & Area *(break out 1st and 2nd fl):*		**Added Insulation:**
North	***East***	☐ **Blown cellulose** ☐ **Cellulose-interior** ☐ **Cellulose-wood** ☐ **Cellulose-slate/vinyl** ☐ **Cellulose-steel/alum** ☐ **Cellulose-stucco** Additional Costs (i.e. LSWP):
South	***West***	

Comments:

Wall Type 2

Wall Type:	Stud Size:	Exterior Type:	Exposed to:	Existing Insul:
☐ Balloon	☐ 2x2	☐ Wood	☐ Outside	☐ Cell Blown
☐ Platform	☐ 2x3	☐ Metal/Vinyl	☐ Buffered	☐ FG Blown
☐ Masonry	☐ 2x4	☐ Stucco		☐ Rockwool
☐ Block	☐ 2x6	☐ Brick/Stone	**Existing R-Value:**	☐ Batts FG
☐ Other	☐ 2x8	☐ Other		☐ Polystyrene
				☐ Other

Wall Codes & Area *(break out 1st and 2nd fl):*		**Added Insulation:**
North	***East***	☐ **Blown cellulose** ☐ **Cellulose-interior** ☐ **Cellulose-wood** ☐ **Cellulose-slate/vinyl** ☐ **Cellulose-steel/alum** ☐ **Cellulose-stucco** Additional Costs (i.e. LSWP):
South	***West***	

Comments:

Building Shell-Attic

Attic 1

Attic Code: **Joist Spacing:** ☐ 16in ☐ 24in **Area (sq ft):**	**Attic Type:** ☐ Floored ☐ Unfloored ☐ Cathedral or Flat ☐ Outer Ceiling Joist ☐ Collar Beam ☐ Kneewall ☐ Roof Rafter	**Existing Insulation:** ☐ Cellulose Blown ☐ FG Blown ☐ Rockwool ☐ Batts FG ☐ Other: **Existing Depth (in):**

Comments: *(include information on bypasses, notable features, etc.)*

Added Insulation	Additional Costs	
☐ **Blown cellulose**	☐ **Access fee-Interior**	☐ **Hatch-horizontal**
☐ **Below Floor-Cellulose**	☐ **Access fee-Roof**	☐ **Hatch-vertical**
☐ **Slants-Side Attic Method**	☐ **Bypass sealing: # hours ____**	☐ **Hatch-WS ONLY**
☐ **Slants-Drill/Blow/Patch**	☐ **Flue Shielding**	☐ **Knob & Tube**
☐ **FG Batt R22**	☐ **Vent Chutes: # chutes_____**	☐ **Other:**
☐ **Other:**		

Attic 2

Attic Code: **Joist Spacing:** ☐ 16in ☐ 24in **Area (sq ft):**	**Attic Type:** ☐ Floored ☐ Unfloored ☐ Cathedral or Flat ☐ Outer Ceiling Joist ☐ Collar Beam ☐ Kneewall ☐ Roof Rafter	**Existing Insulation:** ☐ Cellulose Blown ☐ FG Blown ☐ Rockwool ☐ Batts FG ☐ Other: **Existing Depth (in):**
Comments: *(include information on bypasses, notable features, etc.)*		

Added Insulation	Additional Costs	
☐ **Blown cellulose**	☐ **Access fee-Interior**	☐ **Hatch-horizontal**
☐ **Below Floor-Cellulose**	☐ **Access fee-Roof**	☐ **Hatch-vertical**
☐ **Slants-Side Attic Method**	☐ **Bypass sealing: # hours ____**	☐ **Hatch-WS ONLY**
☐ **Slants-Drill/Blow/Patch**	☐ **Flue Shielding**	☐ **Knob & Tube**
☐ **FG Batt R22**	☐ **Vent Chutes: # chutes_____**	☐ **Other:**
☐ **Other:**		

Attic 3

Attic Code: **Joist Spacing:** ☐ 16in ☐ 24in **Area (sq ft):**	**Attic Type:** ☐ Floored ☐ Unfloored ☐ Cathedral or Flat ☐ Outer Ceiling Joist ☐ Collar Beam ☐ Kneewall ☐ Roof Rafter	**Existing Insulation:** ☐ Cellulose Blown ☐ FG Blown ☐ Rockwool ☐ Batts FG ☐ Other: **Existing Depth (in):**
Comments: *(include information on bypasses, notable features, etc.)*		

Added Insulation	Additional Costs	
☐ **Blown cellulose**	☐ **Access fee-Interior**	☐ **Hatch-horizontal**
☐ **Below Floor-Cellulose**	☐ **Access fee-Roof**	☐ **Hatch-vertical**
☐ **Slants-Side Attic Method**	☐ **Bypass sealing: # hours ____**	☐ **Hatch-WS ONLY**
☐ **Slants-Drill/Blow/Patch**	☐ **Flue Shielding**	☐ **Knob & Tube**
☐ **FG Batt R22**	☐ **Vent Chutes: # chutes_____**	☐ **Other:**
☐ **Other:**		

Attic 4

Attic Code: **Joist Spacing:** ☐ 16in ☐ 24in **Area (sq ft):**	**Attic Type:** ☐ Floored ☐ Unfloored ☐ Cathedral or Flat ☐ Outer Ceiling Joist ☐ Collar Beam ☐ Kneewall ☐ Roof Rafter	**Existing Insulation:** ☐ Cellulose Blown ☐ FG Blown ☐ Rockwool ☐ Batts FG ☐ Other: **Existing Depth (in):**
Comments: *(include information on bypasses, notable features, etc.)*		

Added Insulation	Additional Costs	
☐ **Blown cellulose**	☐ **Access fee-Interior**	☐ **Hatch-horizontal**
☐ **Below Floor-Cellulose**	☐ **Access fee-Roof**	☐ **Hatch-vertical**
☐ **Slants-Side Attic Method**	☐ **Bypass sealing: # hours ____**	☐ **Hatch-WS ONLY**
☐ **Slants-Drill/Blow/Patch**	☐ **Flue Shielding**	☐ **Knob & Tube**
☐ **FG Batt R22**	☐ **Vent Chutes: # chutes_____**	☐ **Other:**
☐ **Other:**		

Building Shell-Foundation

Foundation 1

Foundation Code:

Type:
- ☐ Conditioned
- ☐ Non Conditioned
- ☐ Vented Non Conditioned
- ☐ Unintentionally Conditioned
- ☐ Slab Uninsulated
- ☐ Insulated Slab

Floor Area:

Joist size (in):
☐ 4 ☐ 6 ☐ 8 ☐ 10 ☐ 12

Wall Height:

Total Perimeter:

Height Exposed:

Existing R-Value (walls):

Add Sill Insulation
- ☐ **2 Part Foam**
- ☐ **Rigid Board**

Perimeter to Insulate:

Add Wall Insulation
- ☐ **2 Part Foam**
- ☐ **Rigid Board**

Total sq ft:

Comments:

☐ **Vapor Barrier Needed**

Total sq ft (include walls):

☐ **Seal ducts in crawlspace**

Foundation 2

Foundation Code:

Type:
- ☐ Conditioned
- ☐ Non Conditioned
- ☐ Vented Non Conditioned
- ☐ Unintentionally Conditioned
- ☐ Slab Uninsulated
- ☐ Insulated Slab

Floor Area:

Joist size (in):
☐ 4 ☐ 6 ☐ 8 ☐ 10 ☐ 12

Wall Height:

Total Perimeter:

Height Exposed:

Existing R-Value (walls):

Add Sill Insulation
- ☐ **2 Part Foam**
- ☐ **Rigid Board**

Perimeter to Insulate:

Add Wall Insulation
- ☐ **2 Part Foam**
- ☐ **Rigid Board**

Total sq ft:

Comments:

☐ **Vapor Barrier Needed**

Total sq ft (include walls):

☐ **Seal ducts in crawlspace**

Heating

Heating System 1

General Information

Heating Code:

Equipment Type:
- ☐ Gravity Furnace
- ☐ Forced Air Furnace
- ☐ Hot Water Boiler
- ☐ Fixed Electric Resistance
- ☐ Vented Space Heater
- ☐ Other

Fuel:
- ☐ Natural Gas
- ☐ Oil
- ☐ Electricity
- ☐ Other _____

Location:
- ☐ Heated Space
- ☐ Unconditioned Space
- ☐ Unintentionally Heated

Heat Supplied:
- ☐ 100%
- ☐ Other _____

Manufacturer:

Model #:

Input:

Output:

AFUE:

Age:

Condition:
- ☐ Good
- ☐ Fair
- ☐ Poor (but working)

Programmable T-Stat:
- ☐ Yes

Automatic Vent Damper:
- ☐ Present

Pilot Light/IID:
- ☐ IID
- ☐ Pilot ☐ On in summer

Power Burner:
- ☐ Yes

Replacement System:
- ☐ **Evaluate Replacement**
- ☐ **Tune-up Mandatory**
- ☐ **Replace w/High Efficiency**
- ☐ **Replace w/Standard**

Cabinet size:

☐ **Install EC motor upgrade**

☐ **New Slot** ☐ **New Cover**

Additional Costs:
- ☐ **Cond. Pump-New**
- ☐ **Cond. Pump-Replace Line**

Seal Ductwork
- ☐ **HVAC contractor**
- ☐ **WX contractor**

Combustion Air:
- ☐ **New**
- ☐ **Remove from return**
- ☐ **J trap only**

☐ **Remove humidifier**

Other:

Comments:

Damper Type:	Damper Condition:	Chimney Type:	Chimney Condition:
☐ None Found	☐ Good	☐ Masonry-Lined	☐ Good
☐ Electric	☐ Fair	☐ Masonry-Unlined	☐ Fair
☐ Thermal	☐ Poor (working)	☐ Metal	☐ Poor (working)
☐ Barometric	☐ Broken	☐ None	☐ Broken
☐ None-Recommended	☐ Broken-Replace	☐ Other	☐ None
☐ Other	☐ N/A		☐ N/A

Flue Type:	Flue Condition:	Flue Diameter (in):	Combustion Air:
☐ Metal-Single Wall	☐ Good		☐ Adequate
☐ Metal-Double Wall	☐ Fair		☐ Present-Inadequate
☐ PVC	☐ Poor (working)	**Combustion System:**	☐ None
☐ Other	☐ Broken	☐ Sealed	☐ Other
	☐ N/A	☐ Unsealed	

Inspections:	Elec. Service Switch:	*Thermostat:*	Daytime Setting:
☐ Cracked heat exchanger ☐ Insufficient Clearance ☐ Gas Leak Present ☐ Fuel Shutoff Valve MISSING ☐ Drip Leg MISSING ☐ Any Other Problems	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken ☐ None ☐ N/A	**Thermostat Type:** ☐ Bimetal ☐ Mercury Bulb ☐ Elec-(no setback) ☐ Elec-Setback ☐ Powerpile	**Nighttime Setting:** **Anticipator Setting:** ☐ **Relocate** ☐ **Adjustment Needed**

Furnace Components:

☐ Adjustable Control Settings Fan On: | Fan Off: |High Limit: | ☐ Limit not working

Burner Type:	Burner Condition:	Pilot Type:	Blower Type:	Belt Condition:
☐ Ribbon ☐ Power ☐ Upshot ☐ Flame Retention ☐ Other	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken ☐ None ☐ N/A	☐ On in Summer ☐ Off in Summer ☐ Hot Surface ☐ IID ☐ Other	☐ Direct ☐ Belt **Blower Condition** ☐ Clean ☐ Dirty ☐ Plugged	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken ☐ None ☐ N/A
Humidifier:	**Elect Air Cleaner**	**AC Coil:**	**Filter Size:**	**Filter Condition:**
☐ Good ☐ Fair ☐ Poor (working) ☐ Broken ☐ None	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken ☐ None	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken ☐ None		☐ Clean ☐ Fair ☐ Dirty ☐ Plugged ☐ None

Boiler Components: ☐ ASBESTOS PRESENT ☐ **REMOVAL REQUIRED**

System Type:	Xtank Condition:	Drain Valve Condition:	General Condition:
☐ Gravity ☐ Pump **Pump Location:** ☐ Supply ☐ Return	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken

☐ **T/P Valve Present** **Pressure Reading:** ☐ Low Water Cutoff **AquaStat Setting:**	**Convector Type:** ☐ Radiator ☐ Baseboard ☐ Both ☐ Operable in Each Room ☐ Operable in Unconditioned Space ☐ Client knows how to use Radiator Key ☐ Zone Valves Present	**Zone Valve Type/Model:** **Zone Valve Condition:** ☐ Good ☐ Fair ☐ Poor (working) ☐ Broken

Comments:

Baseloads

Water Heating

General Information	**Location:**	*Inspections*
Manufacturer:	☐ Heated Space ☐ Unconditioned Space ☐ Unintentionally Heated	☐ Insufficient Clearance ☐ Gas Leak Present ☐ Fuel Shutoff Valve MISSING ☐ Drip Leg MISSING
Model #:	**Size (gallons):** ☐ 30 ☐ 40 ☐ 50 ☐ 75	**Elec. Service Switch:** ☐ Good ☐ Fair ☐ Poor (working) ☐ Broken ☐ None ☐ N/A
Fuel: ☐ Natural Gas ☐ Oil ☐ Electricity ☐ Other	☐ Water heater wrap present ☐ Pipe wrap present	
Input:	**Original Tank Insulation (in):**	**Hot Water Temp:**
Age:	**Insulation Type:** ☐ Fiberglass ☐ Polyurethane	☐ Temp adjustment Needed ☐ Relief Piping Needed ☐ Water Leak Present

Damper Type:	**Damper Condition:**	**Chimney Type:**	**Chimney Condition:**
☐ None Found ☐ Electric ☐ Thermal ☐ Barometric ☐ None-Recommended ☐ Other	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken ☐ Broken-Replace ☐ N/A	☐ Masonry-Lined ☐ Masonry-Unlined ☐ Metal ☐ None ☐ Other	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken ☐ None ☐ N/A

Flue Type:	**Flue Condition:**	Replacement System:
☐ Metal-Single Wall ☐ Metal-Double Wall ☐ PVC ☐ Other	☐ Good ☐ Fair ☐ Poor (working) ☐ Broken ☐ N/A	☐ **Replace with PV unit** ☐ **Replace with Atmospheric** ☐ **Re-vent to 4”** ☐ **Fix Venting Issues:**

Flue Diameter:	**Combustion Air:**	**Combustion Air:**	☐ **PV Exists-Needs GFI**
	☐ Adequate ☐ Present-Inadequate ☐ None ☐ Other	☐ **New** ☐ **Remove from return** ☐ **J trap only**	☐ **Other:**

Comments:

Heating Plant	
Flue Gas Analysis	
Inlet temp:	
Flue Gas Temp:	
Net Stack Temp:	
% Oxygen:	
% CO2:	
Smoke #:	
SSE:	
Carbon Monoxide	
CO in flue (ppm):	
CO free air (ppm):	
Heat Rise Test	
Return:	
Supply:	
Heat Rise:	
Rated Heat Rise:	

Multi Chamber Heating Plant					
Inlet temp:					
Flue Gas:					
Net Stack:					
% Oxygen:					
% CO2:					
SSE:					
CO in Flue:					
CO Free Air:					

DHW	
Flue Gas Analysis	
Inlet temp:	
Flue Gas Temp:	
Net Stack Temp:	
% Oxygen:	
% CO2:	
Smoke #:	
SSE:	
Carbon Monoxide	
CO in flue (ppm):	
CO free air (ppm):	

Comments:

Refrigerator

General Information			
Manufacturer:	**Model:**		☐ **Replace -- Other funding source** ☐ **Replace – Evaluate w/DOE**
Size (cu ft): ☐ 14 ☐ 15 ☐ 16 ☐ 17 ☐ 18 ☐ 21 ☐ Other: **Location:** ☐ Heated Space ☐ Unconditioned Space ☐ Unintentionally Heated	**Style:** ☐ Top Freezer ☐ Bottom Freezer ☐ Side by Side ☐ Single Door ☐ Single Door w/ Freezer ☐ Other **Defrost:** ☐ Auto ☐ Manual	**Age:** ☐ < 5 ☐ 10-15 ☐ 5-9 ☐ >15 **Comments:**	**Door Seal:** ☐ Good ☐ Fair ☐ Poor

Health and Safety

Smoke/CO Alarms

SMOKE ALARM			CO ALARM		
Location	**Working** < 5 years	**Install New**	**Location**	**Working** < 5 years	**Install New**
	☐	☐		☐	☐
	☐	☐		☐	☐
	☐	☐		☐	☐
	☐	☐		☐	☐
	☐	☐		☐	☐
	☐	☐		☐	☐
	☐	☐		☐	☐
	☐	☐		☐	☐
COMBO SMOKE/CO ALARM			**Total Smoke to Install:** **Total CO to Install:** **Total COMBO Smoke/CO:**		
	☐	☐			
	☐	☐	**Comments:**		
	☐	☐			
	☐	☐			

Equipment

☐ **Wood Stove/Fireplace is present**
- ☐ Improper venting
- ☐ Combustion air is inadequate

☐ **Clothes Dryer improper venting**

Exhaust Fans

Bathroom

☐ Missing
☐ Not Operational
☐ Improper Vent

Kitchen

☐ Missing
☐ Not Operational
☐ Improper Vent
☐ **Air-to-Air Exchanger Exists**

Fan measurements on "Blower Door Testing Form"

CO Measurement Oven:
LF Burner 1:
LR Burner 2:
RF Burner 3:
RR Burner 4:
Gas Leak Present ☐

Comments:

☐ **Dryer Venting VENT ONLY**
☐ **Dryer Venting HOOD ONLY**
☐ **Dryer Venting VENT AND HOOD**

☐ **Clean/Tune Oven**
☐ **Clean/Tune Stove Top Burners**
☐ **Repair Gas Leak At Cook Stove**

Install Exhaust Fan(s)

Location:
- ☐ **Motion** ☐ **Switch** ☐ **Low Profile**
- ☐ **w/Light**
- ☐ **Range Hood (standard)**
- ☐ **Range Hood (Venmar)**

Accessible Attic Above? ☐ **Yes** ☐ **No** ☐ **N/A**

Possible Venting Locations:
- ☐ **Gable** ☐ **Roof** ☐ **Other:**

Additional Instructions:

☐ **Revent Existing Fan(s)**
Location(s):

☐ **Service Existing Fan**
Location(s):

☐ **Install 2nd Fan** *(list instructions in "Comments")*
☐ **Other:**

Attic

☐ **Recessed Lights Present**
☐ **Chimney/Flue Shielding**
☐ **Wiring Problems**
☐ **Ventilation Inadequate**
☐ **Water Leaks Present**
☐ **Moisture/Mold Evident**
☐ **Vermiculite Present**

Other Problems:

Walls

☐ **Wiring Problems**
☐ **Water Leaks Present**
☐ **Moisture/Mold Evident**
☐ **Lead Base Paint is Likely**
☐ **Asbestos in Siding is Likely**

Other Problems:

Basement/Crawlspace

☐ **Vapor Barrier Needed**
☐ **Wiring Problems**
☐ **Water Leaks Present**
☐ **Plumbing Leaks Present**
☐ **Moisture/Mold Evident**

Other Problems:

Comments:

Building Shell-Windows

Jalousie **W**ood **S**ingle Pane **F**ixed **A**wning **Sl**ider **Sk**ylight	**M**etal **W**ood or Vinyl **I**mproved Metal	**M**etal **S**torm/Single **F**ixed **B**ad Storm/Single **Do**or window **D**ouble Pane	**V**ery Tight **T**ight **M**edium **L**oose **Q**uite Loose	**Comments:**

Code(s)	Type	Leakiness	Width	Height	Wall	#	Repair
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
		VT / T / M / L / QL					☐
							☐

Building Shell-Doors

Code(s)	Type	Leakage	Storm	W	H	#/Wall	
	HCW WSC IS SPSG DPSG	**T / M / L**	**A D N**				**W/S Sweep**
	HCW WSC IS SPSG DPSG	**T / M / L**	**A D N**				**W/S Sweep**
	HCW WSC IS SPSG DPSG	**T / M / L**	**A D N**				**W/S Sweep**
	HCW WSC IS SPSG DPSG	**T / M / L**	**A D N**				**W/S Sweep**