Current WAP System

- eHEAT
  - Grant
  - Budgets
  - Eligibility
  - WAP event

- WA
  - Energy modeling
  - Work orders
  - Inspection/statuses
  - Reports

- eHEAT
  - Cash Requests
  - FSR
  - Reports
Current WAP System

- Allocation NFA
- Obligated funds tracking

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  - FSR
  - Reports

- **SWS details**
  - State monitoring
  - Issue resolution
  - Statewide reporting

- **Pictures**
  - Client forms
  - SHPO
  - Audit notes

- **Obligated funds tracking**

- **Allocation**
  - NFA

- **Waitlist**
  - Deferral lists
  - Previously weatherized list
  - Pre-audit data
Current WAP System

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We can do better!!
Transition

Allocation
NFA

Obligated funds tracking

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Issue resolution
Statewide reporting

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Deferral lists
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Pre-audit data

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Audit notes

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mn.gov/commerce
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Obligated funds
- tracking
- All Reports

eHEAT
- • Eligibility

WA
- • Energy modeling

mn.gov/commerce
New WAP System

FACS Pro

- Budget Pro
  - Allocation
  - NFA
  - Grants
  - Budgets
  - Cash Requests
  - FSR
  - Eligibility (copy)

- WX Pro
  - SWS details
  - State monitoring
  - Issue resolution
  - Pictures
  - Client forms
  - Work orders
  - WAP event

- Report Module
  - Obligated funds tracking
  - All Reports

eHEAT
- Eligibility

Audit data collection tool

Only if no access to internet at audit

mn.gov/commerce
Household info from eHEAT
WX Pro has lots of functions in one place
WX Pro has lots of functions in one place:

Previously weatherized list
WX Pro has lots of functions in one place:

Wait lists
Deferrals
Production/process lists
Budget Pro also has lots of functions in one place.
The Reports tab offers new functionality.
The System Setup tab contains lots of settings and libraries
Live demo today

**FACS Pro**

**Budget Pro**
- Allocation
- NFA
- Grants
- Budgets
- Cash Requests
- FSR
- Eligibility (copy)

**WX Pro**
- SWS details
- State monitoring
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- Client forms
- Work orders
- WAP event

**Report Module**
- Obligated funds tracking
- All Reports

**eHEAT**
- Eligibility

**Audit data collection tool**

**WA**
- Energy modeling

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Areas of focused feedback for today

**FACS Pro**
- **Budget Pro**
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  - **Budgets**
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  - FSR
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**eHEAT**
- Eligibility

**Audit data collection tool**

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- Energy modeling

Only if no access to internet at audit
FACSPro Audit Process
With FACSPro

• eHEAT for client eligibility

• FACSPro—Customer Intake Section
  • Eligible clients will automatically go from eHEAT to FACSPro

• WAP Event—Service Providers will move customers within FACSPro to WXPRO

Currently

• eHEAT for client eligibility

• eHEAT—Client information
  • EAP App

• WAP Event—Customer information currently goes from eHEAT to WA
FACSPRO Audit Process

• Moving Client Coyote Moon into WXPRO
  • Click find in upper left hand corner
    • Search for coyote under first name
    • Double click on client Coyote Moon
  • Click on Programs
    • Select Weatherization
    • Click on create interaction
• WXPro
  • Click on Weatherization Application
    • Coyote Moon will appear because they are already selected in FACSPro
  • Click on the weatherization application
FACSPro Audit Process

• WXPro

  • Select “Update Status/ Movement”
    • Select “Blank NEAT IWC”
    • Select Pre Inspection
    • Select Scheduling—add scheduled audit
    • Select Inspection
FACSPro Audit Process

- WXPro
  - Select “Import/ Update Inspection Sheet”
  - Select New
  - Import IWC called “test”
  - You can go forward through audit information by pressing the arrows or by selecting a section from the menu on the left
  - Select “export work order” and the work order will connect to WA
• WXPro
  • Select “Import Work Order” in WXPro
  • A few things in WA will have to be filled in
  • Run WA Audit
  • Import work order to FACSPRO
  • Go out of WxPro and then back in
  • Add actual quantity and unit price, comments, statuses, any change orders
• WXPro
  • Add Cost Center Information or
  • Review cost center information from another customer
FACSPro Audit Process

- WXPro
  - Review Action Plan
  - Review Documents
  - Review Utility Usage
FACSPro Audit Process

• WXPro—Weatherization Application
  • Review Action Plan
  • Review Documents
  • Review Utility Usage
• WXPro
  • Review Queue
  • Review Scheduling
  • Review Utility Usage
Thank You!

Benjamin Tucker

Benjamin.tucker@state.mn.us

651-539-1860
Work Orders/ Libraries/ Measures

Jake McAlpine | WAP Coordinator
Current WAP System

- **eHEAT**
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  - Budgets
  - Eligibility
  - WAP event

- **WA**
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  - Reports

- **eHEAT**
  - Cash Requests
  - FSR
  - Reports
Weatherization Assistant

- Supply Library
- Setup Library
- Work Orders
- Reports
- Energy Model
- MHEA
- NEAT
Areas of focused feedback for today

FACS Pro

Budget Pro
- Allocation
- NFA
- Grants
- Budgets
- Cash Requests
- FSR
- Eligibility (copy)

WX Pro
- SWS details
- State monitoring
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- Client forms
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- WAP event

WA
- • Energy modeling

eHEAT
- • Eligibility

Audit data collection tool

Only if no access to internet at audit

Report Module
- Obligated funds tracking
- All Reports
At your table discuss and record answers to the following:

1. Do the current work orders in WA function well? Why?
2. If we create a new work orders, what minimum info do we need to include?
3. What measure details do you include in work orders at your office?
4. Do you use the notes section to communicate with contractors/crews?
5. How many User Defined Measures in WA do you frequently use?
At your table discuss and record answers to the following:

1. Do you typically have to change the name of measures once a work order has been made?
At your table discuss and record answers to the following:

1. How many people at your office work on updating libraries?
2. How often are libraries updated?
3. Do your libraries include measure notes?
4. Do your libraries include material/labor splits?
1. Are there common measures that your contractors or crews have issues installing and would benefit from a visual step by step guide?
Budgets

Jake McAlpine | WAP Coordinator
Budget Pro

FACS Pro

Budget Pro
- Allocation
- NFA
- Grants
- Budgets
- Cash Requests
- FSR

Eligibility (copy)

WX Pro
- SWS details
- State monitoring
- Issue resolution
- Pictures
- Client forms
- Work orders
- WAP event

WA
- Issues resolution
- Pictures
- Client forms
- Work orders
- WAP event

Report Module
- Obligated funds tracking
- All Reports

eHEAT
- Eligibility

Audit data collection tool

Only if no access to internet at audit
Budget Pro

FACS Pro

- Allocation
- NFA
- Grants
- Budgets
- Cash Requests
- FSR

WX Pro

- SWS details
- State monitoring
- Issue resolution
- Pictures
- Deferral lists
- SHPO
- Audit notes
- Inspection/statuses

Report Module

- Obligated funds tracking
- All Reports

- Under Construction

EHEAT
- Eligibility

Audit data collection tool

WA
- Energy modeling

Only if no access to internet at audit
1. Grant (statewide)
   • Ex. DOE, EAP/WX A2108, Propane

2. Funds (statewide)
   • Ex. Admin, Program, T&TA

3. Sub funds (SP specific)
   • Ex. Health & Safety, Program Support
   • Some of these categories have “sub sub funds”

   • For each SP, all their Sub funds must add up to their allocated Fund amount
   • Statewide all SP Funds must add up to the total Grant amount
1. Grant (statewide)
   Contains
   • Year
   • total dollar amount for each grant
   Notes
   • Entered by State staff.
   • Ensures that allocations, cash requests, and reported spending do not exceed total grant amount
2. Funds (statewide)
   Contains
   • total dollar amount for each fund
   Notes
   • Entered by State staff.
   • Ensures that allocations, cash requests, and reported spending do not exceed total fund amount
   • Funding formula break statewide amounts into SP specific amounts on each NFA.

SP Grant Agreement
Contains
• All current SP names and the date of official contract
• Allows SP to receive allocations
Notes
• Entered by State staff
3. Sub funds (SP Budget/plan)
Contains
• SP’s breakdown of allocated funds into sub-funds for each grant and fund
• Plan portion
  • contains about 12 narrative questions (DOE only)
  • Quarterly production estimates for each grant
Notes
• Entered by SP staff
• Reviewed and approved by State staff
• Required before cash request of FSR submittal
• FSR’s are based on these sub fund breakdowns
<table>
<thead>
<tr>
<th>GRANT</th>
<th>FUND</th>
<th>SUB FUND</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 DOE</td>
<td>1.1Admin</td>
<td>n/a</td>
</tr>
<tr>
<td></td>
<td>1.2Program</td>
<td>1.2.1 Program Support</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1.2.2 Direct Service</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1.2.2.1 Health &amp; Safety</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1.2.2.2 Incidental Repair</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1.2.2.3 Energy Conservation</td>
</tr>
<tr>
<td></td>
<td>1.3 T &amp; TA</td>
<td>n/a</td>
</tr>
</tbody>
</table>

| 2 EAPWX A2108 | 2.1 Admin | 2.1 Program |
|               | 2.2.1 Audit Event | |
|               | 2.2.2 Standalone Event | |
|               | 2.2.1.1 Program Support | 2.2.1.2 Direct Service |
|               | 2.2.1.2.1 Health & Safety | 2.2.1.2.2 Incidental Repair |
|               | 2.2.1.2.3 Energy Conservation | |
|               | 2.2.2.1 Program Support | 2.2.2.2 Direct Service |

| 3 Propane     | 3.1 Admin | 3.1 Program |
|               | 3.2 Audit Event | |
|               | 3.2.2 Standalone Event | |
|               | 3.2.1.1 Program Support | 3.2.1.2 Direct Service |
|               | 3.2.1.2.1 Health & Safety | 3.2.1.2.2 Incidental Repair |
|               | 3.2.1.2.3 Energy Conservation | |

Current fields in one SP’s budget

We are using this as a template to modify FACS Pro
Production plan
Contains narrative questions:

1. Please list your quarterly goals for all DOE production. Make your most realistic estimate.

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Dates</th>
<th>Goal Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Quarter</td>
<td>Jul 1, 2016 - Sep 30, 2016</td>
<td></td>
</tr>
<tr>
<td>Second Quarter</td>
<td>Oct 1, 2016 - Dec 31, 2016</td>
<td></td>
</tr>
<tr>
<td>Third Quarter</td>
<td>Jan 1, 2017 - Mar 31, 2017</td>
<td></td>
</tr>
<tr>
<td>Fourth Quarter</td>
<td>Apr 1, 2017 - Jun 30, 2017</td>
<td></td>
</tr>
</tbody>
</table>

2. Please list the order in which you will serve the following priority households:
   - Elderly
   - Handicapped
   - High consumer
   - Children under 15

3. Describe how you will assure that priority households are served before non-priority households.

4. Indicate how you will ensure that weatherization activities are provided to eligible households within ninety days or less, from audit to final inspection.

5. Describe how you will coordinate weatherization services with local EAP Providers and/or other home rehab programs.

6. List all staff positions that are paid entirely or partly by USDOE funds. For each position, list the percent of time that is charged to DOE.
Production plan
Contains narrative questions:

1. Please indicate the number of crews and/or contractors you will use to complete building shell and mechanical activities in client’s homes.

<table>
<thead>
<tr>
<th>Crews</th>
<th>Building Shell</th>
<th>Mechanical</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. List any vehicles or other equipment you plan to purchase and the date by which you plan to have completed the purchase.

3. If DOE vehicles/equipment are used by other programs or used to generate income, describe how costs will be shared, and how any income will be returned to the DOE describe weatherization program.

4. Please use this space to make any other comments you feel will help us in understanding and evaluating your DOE work plan.

Please list the Training and Technical Assistance activities and/or expenses you have planned for the coming year. For each item described that is not in the list above, explain its purpose or benefit. Also indicate how or how many will participate. Also include the amount of DOE and other dollars for each activity.

<table>
<thead>
<tr>
<th>Item/Description</th>
<th>DOE Funds Used</th>
<th>Other Funds Used</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What else should we consider including?

Budget
CIP funds?
  what would add value?

Production plan
Production autofill and adjustment based on total fund amount?
Auto fill averages from previous year:
  total unit cost?
  H&S, ECM, IRM?
Actual quarterly production?

Cash Requests
Goal is to mirror eHEAT next gen
Likely will change to fund specific

FSR
Goal is to mirror eHEAT next gen
Auto-fill direct service from completed work orders?
Questions?

Vikings 29 – Saints 24