



MANAGING YOUR PROGRAM USING
eHEAT & WA DATA

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INTRODUCTION

- **GOAL:** To provide Service Providers with information and tools for better program management and compliance.
- **Focus:** Selected Weatherization Assistant (WA) and eHEAT reports.

REPORTS ARE TOOLS

- Achieve and maintain compliance.
 - Limit or eliminate findings in monitoring reports
 - Avoid questioned or disallowed costs
 - Determine whether program is on track to meet its goals
 - Provide data for use in program management and decision-making

SERVICE PROVIDERS ARE RESPONSIBLE

- For entering complete/accurate data into WA and eHEAT
- For Creating /implementing internal quality control processes for WA and eHEAT data entry.

COMMERCE REPORT REVIEW

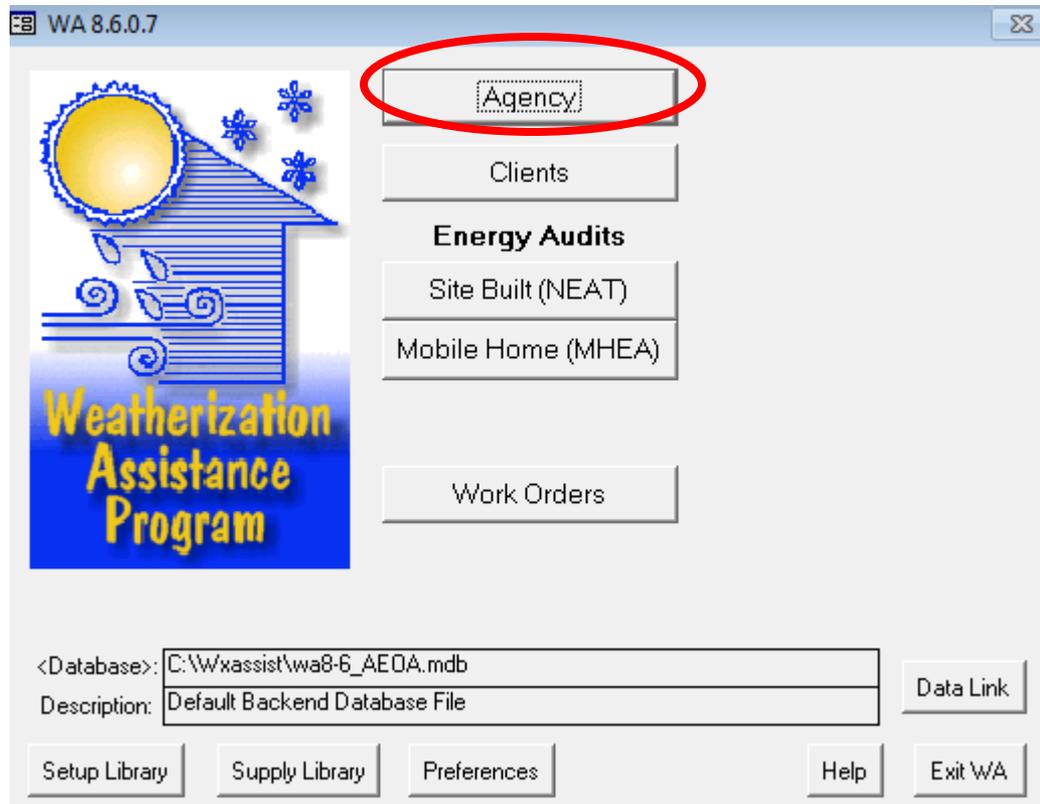
- Commerce reviews selected reports and sends monthly Error Reports
- Be proactive
 - Make time to review reports prior to uploading data to Commerce.
 - Correct errors BEFORE uploading WA data to Commerce.

RED FLAGS

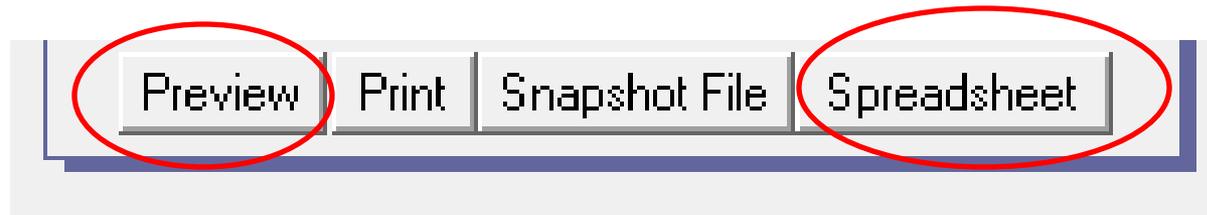
- Missing or clearly erroneous data
- Data outside acceptable ranges
- Varying costs for the same measure from one job to the next

FINDING WA REPORTS

- Click on the Agency Tab



FINDING WA REPORTS



➤ Preview view

- Formatted as a report with some summary information
- Can be printed in report format

➤ Spreadsheet view

- Allows re-arrangement of data
- Sometimes contains more data than is available in the Preview.
- Calculations

REPORTS AVAILABLE

- Use the Report dropdown to select a report

Description	#
All Events Client Summary	1
All Events Cost Center Summary	3
Audit Events Cost Center Summary	5
Audit Event Completions - Federal	7
Audit Status - Jobs In Progress	9
Audit Status - All Jobs	11
Audit Events Job SIR Summary	15
Job SIRs Less Than 1	17
Measure SIRs Less Than 1	20
Invalid Audit Events	21
Health and Safety Measure Costs	23
General Repair Measure Costs	25
Standalone Measure Details	27
Measure Costs - Non-Federal Cost Centers	28
CO and Draft Tests - Heating System	29
CO and Draft Tests - Water Heater	31
Blower Door Reduction	33
ARRA Audit Demographics	35
DOE Audit Demographics	37
Other Cost Center Demographics	39
Audit Jobs In Progress	41
Scheduled Audits	43
Open Work Orders	45
All Client List	47
Potential Problem Records	49

REPORT

Select Report: **Job SIRs Less Than 1**

Preview Print Snapshot File Spreadsheet

Clients 0 selected

WORKFLOW MANAGEMENT (WA)

- Audit Status – All Jobs
- Audit Status – Jobs in Progress
 - Status dates and elapsed time
 - Summary data: percent over/under 90 days
- Open Work Orders report shows
 - Current status by name and elapsed time
 - Date the status was set
 - Should be no open work orders on locked jobs

WORKFLOW RED FLAGS

- Too many or too few
 - Completed jobs over 90 days
 - In progress jobs over 60 days
 - Open work orders

COST MANAGEMENT (WA)

- All Events Cost Center Summary
 - Costs for each household by fund
 - Separates cost into four categories and totals
 - Doesn't include program support costs
- Special purpose reports (Health/Safety and Repairs)
 - Show what was done (measure name)
 - Cost of the measure
- Red Flag: Too many high or low costs

OTHER HANDY WA REPORTS

- All Events Cost Center Totals (Coming Soon!)
 - Fund source and total expenditure
 - Units completed
- Audit Event Completions
 - By household and which funds were used
 - Summary data
- All Events Client Summary
 - Lists all clients by event type
 - Unduplicated count

eHEAT REPORTS

- You should be able to see
 - Allocation
 - FSR with Budget

The screenshot displays the eHEAT web application interface. At the top left is the logo for eHEAT (Electronic Household Energy Automated Technology) and the Minnesota Department of Commerce logo. A navigation bar contains the following links: Home, Client Services, Payment Services, Grant Services (highlighted), Admin Services, Help / Manuals, Dashboard, System Admin Services, Reports, and Logout. Below this is a secondary menu with links: Allocate Fund, EAP Plan, Cash Request, FSR, WAP Plan, Maintain Budget, and PreBuy. The main content area features a 'Select Year' section with a 'Help' link on the right. It includes three dropdown menus: '* Service Provider: -Select-', '* Year: -Select-', and '* Program: -Select-'. Below these are five buttons: 'View Allocation', 'Maintain Allocation', 'Maintain Grant Agreement Status', 'View Grant Agreement Status', and 'View Allocation History Report', followed by a 'Clear' button. A red asterisk indicates '* Required Fields'. At the bottom, there is an 'Upload' section with the text 'Upload File for Allocation (Excel File):' and an 'Upload' button.

eHEAT REPORTS (continued)

- You should be able to see
 - FSR with quarterly breakout (no budget in this view)

The screenshot shows the eHEAT website interface. At the top, the logo reads "eHEAT Electronic Household Energy Automated Technology". Below the logo is a horizontal navigation bar with links: Home, Client Services, Payment Services, Grant Services, Admin Services, Help / Manuals, Dashboard, System Admin Services, Reports, and Logout. The "Reports" link is highlighted in blue. Below this bar is a secondary navigation bar with tabs for EAP, WAP, Grant, and Others. The "Grant" tab is selected. Underneath, a "Grant Reports" section is expanded, displaying a list of report types: EAP Fund Usage Report, EAP FSR Submission Status Report, FSR Expenditure Report, and WAP FSR Submission Status Report. Two red arrows are present: one pointing to the "Reports" link in the top navigation bar, and another pointing to the "FSR Expenditure Report" link in the expanded list.

IF YOU CAN'T SEE

- Ask your local eHEAT administrator for access to view

eHEAT AND WA TOGETHER

- Dollar amounts will not be identical.
- Type of funds (cost centers) should agree in both eHEAT and WA.
- Red Flag: Major differences between eHEAT and WA data.
- Using an un-funded cost center

SUMMARY

- Make reports work for you for

- Use them frequently and regularly for
 - Compliance
 - Program management/decision making

QUESTIONS?

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