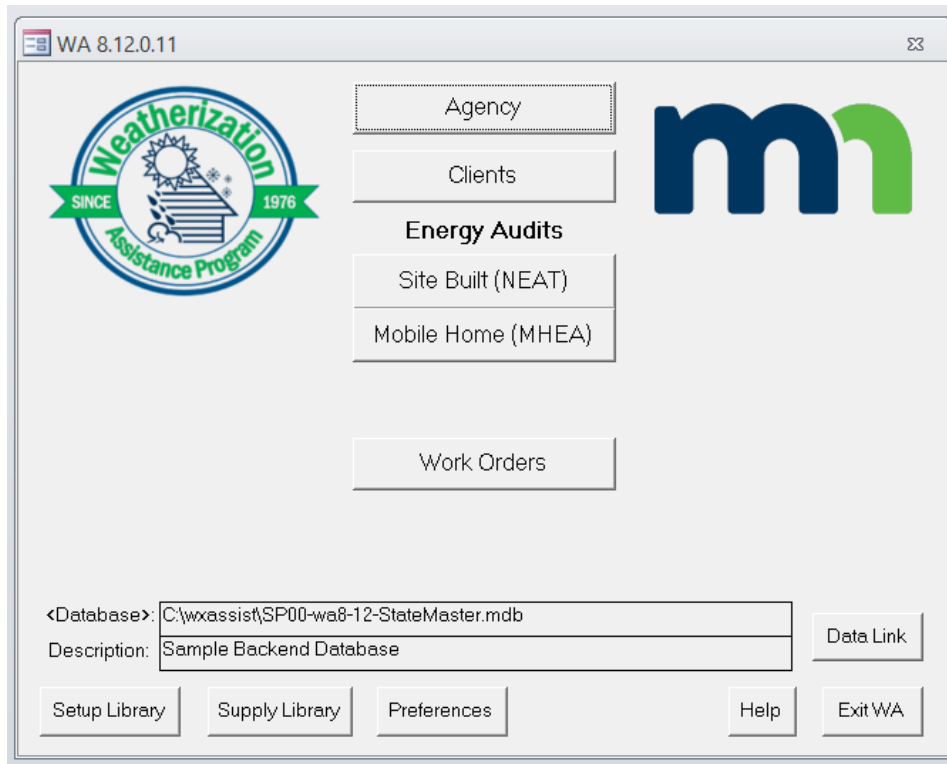
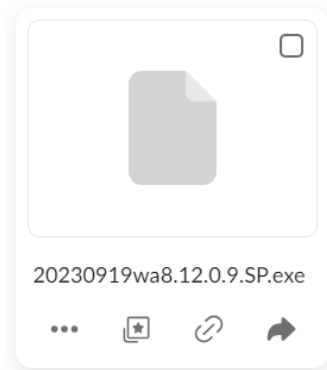


WA 8.12.0.11 User Interface and Program Updates



Download Instructions:

1. Log into Box.com site and continue to find your WA installer and download.




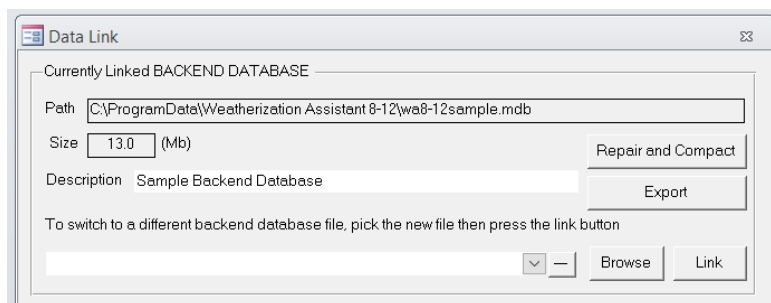
2. Go to your location of your downloads.



3. If your file downloads as Unconfirmed XXXXX.crdownload, rename file to 8.12.0.11.exe, accept change, and then double click to open. Follow prompts to install user interface.
4. Go back to Box.com and download your revised database. You will download and unzip the file that has been posted to Box. Unzip backend database into the path where your original production database came from (likely a shared path). Note, you can rename the backend to whatever makes sense before doing the linking. Each 8.12.0.11 workstation or VM will need to be linked in this way.



5. Open new WA v8.12, login, and click  on the main page.
6. Click browse for BACKEND DATABASE and find your database and then press Link.



7. Verify that you are using the latest Reporting File (ex. SP_8_12_6 as of 10.30.23)

Changes to Cost Centers:

Naming conventions are being phased out with the new 8.12 cost center setup. Cost Center Name can be entered as to what the SP feels would be appropriate for their agency and process. What is now required is Cost Center Type – both Funding Level and Program Level.

ACTION ITEM: Each SP’s will need to go in and fill out required fields that are still blank after the transfer. You can select the Cost Center drop list and see what is missing.

COST CENTER		
by Cost Center Name		
Cost Center Name	Active	Type
CostCenter (2)	Yes	MISSING
EAP/WX	Yes	State
		SubType
		NA
		Program

Agency Information | Contacts (2) | **Cost Centers (1)** | Surveys (0) | Clients (4) | Audits (4) | Work Orders (4) | Libraries

Cost Center Name Active

Cost Center Type

Program Year

Description

Access ID

Program	
Carryover (inactive)	Actual
BIL	
Wx Readiness (WRF)	
EI WIRE	
SERC/WRAP	
SERC-2	
CSPP	
ARRA (inactive)	
Other	

Agency Information | Contacts (2) | **Cost Centers (1)** | Surveys (0) | Clients (4) | Audits (4) | Work Orders (4) | Libraries

Cost Center Name Active

Cost Center Type

Program Year

Description

EAP/WX Program	
EAP/WX Carryover	Actual
Healthy AIR State	
Propane	
Oil (inactive)	
EAP/WX ARPA (inactive)	
Other	

Agency Information | Contacts (2) | **Cost Centers (1)** | Surveys (0) | Clients (4) | Audits (4) | Work Orders (4) | Libraries

Cost Center Name Active

Cost Center Type

Program Year

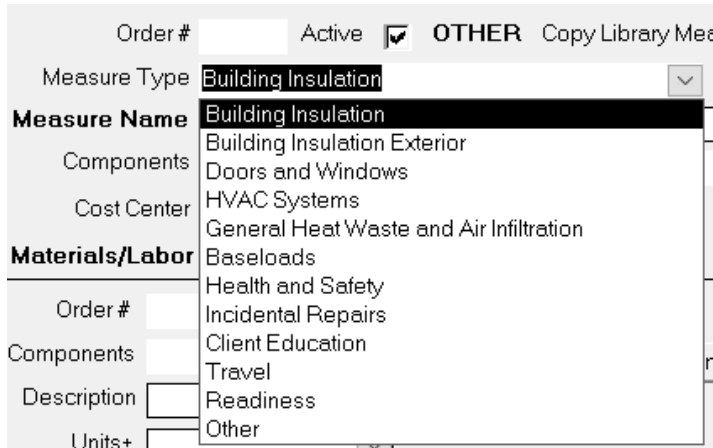
Description

Healthy AIR CIP	
MERC (inactive)	Actual
Other	

Changes to Measure Types and Sub Measure Types:

ACTION ITEM: SP's will need to review current PY files to see if there are any missing Measure Types or Sub Measure Types that were not able to be mapped.

Measure Type Drop List - Added: Building Insulation Exterior (for WRAP) and Readiness



Order # Active OTHER Copy Library Measure

Measure Type **Building Insulation**

Measure Name Building Insulation

Components Building Insulation Exterior
Doors and Windows

Cost Center HVAC Systems
General Heat Waste and Air Infiltration

Materials/Labor Baseloads
Health and Safety
Incidental Repairs

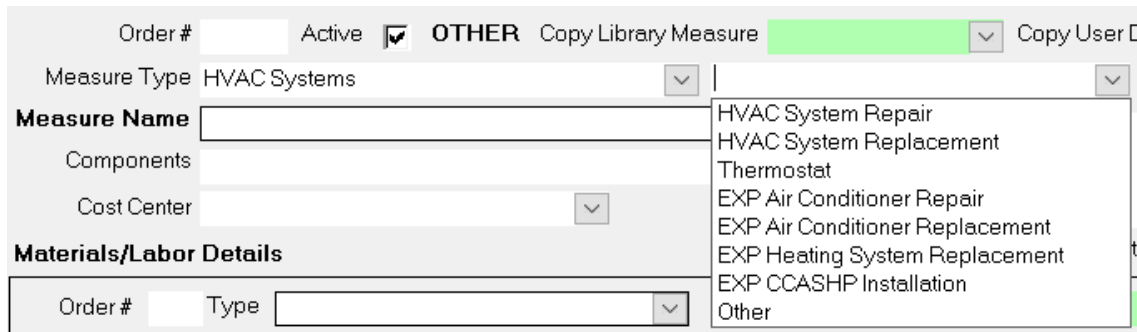
Order # Components

Description Travel
Readiness
Other

Units+

Added Sub Measure Types under a variety of Measure Types:

Added Sub Measure Types in HVAC:



Order # Active OTHER Copy Library Measure Copy User C

Measure Type HVAC Systems

Measure Name

Components

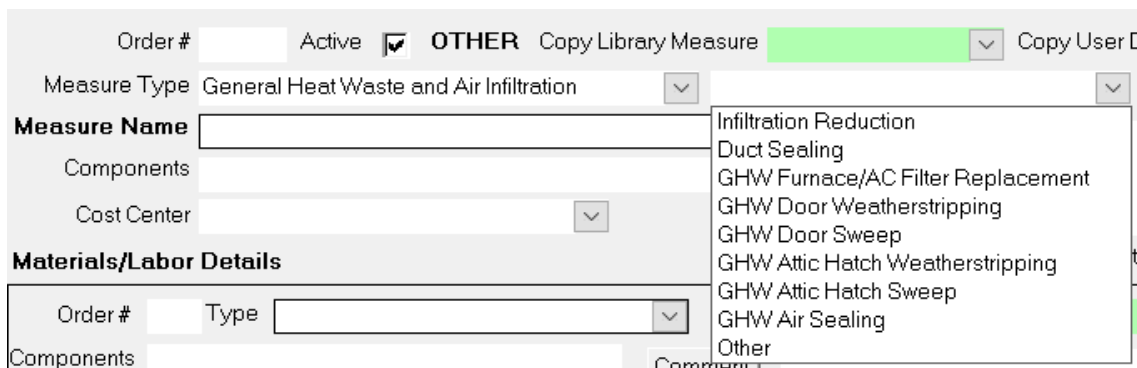
Cost Center

Materials/Labor Details

Order # Type

HVAC System Repair
HVAC System Replacement
Thermostat
EXP Air Conditioner Repair
EXP Air Conditioner Replacement
EXP Heating System Replacement
EXP CCASHP Installation
Other

Added Sub Measure Types in General Heat Waste and Air Infiltration:



Order # Active OTHER Copy Library Measure Copy User C

Measure Type General Heat Waste and Air Infiltration

Measure Name

Components

Cost Center

Materials/Labor Details

Order # Type

Infiltration Reduction
Duct Sealing
GHW Furnace/AC Filter Replacement
GHW Door Weatherstripping
GHW Door Sweep
GHW Attic Hatch Weatherstripping
GHW Attic Hatch Sweep
GHW Air Sealing
Other

Components

Added Sub Measure Types in Baseloads:

Order # Active OTHER Copy Library Measure Copy User

Measure Type Baseloads

Measure Name

Components

Cost Center

Materials/Labor Details

Order # Type

Components

Description

Units+

- LED Bulb Replacement
- Tank Insulation
- Pipe Insulation
- Water Heater Replacement
- Low Flow Showerheads
- Refrigeration
- EXP LED Bulb Replacement
- EXP Water Heater Replacement
- Solar PV
- Other

Note: Due to mapping issues, H&S DWH replacements should be Measure Type – Health and Safety and Sub Measure Type Other.

Added Sub Measure Types in Health and Safety:

Order # Active HSM Copy Library Measure Copy User

Measure Type Health and Safety

Measure Name

Components

Cost Center

Materials/Labor Details

Order # Type

Components

Description

Units+

- Smoke or CO Detector
- Mechanical Ventilation
- Air Sealing
- HVAC System Repair
- HVAC System Replacement
- Cookstove Repair
- Vermiculite Abatement
- EXP Cookstove Repair
- EXP Cookstove Replacement
- EXP Air Conditioner Repair
- EXP Air Conditioner Replacement
- EXP Mold and Moisture Remediation
- Other

Note: Due to mapping issues, H&S DWH replacements should be Measure Type – Health and Safety and Sub Measure Type Other.

Added Sub Measure Types in Readiness:

Order # Active OTHER Copy Library Measure Copy User

Measure Type Readiness

Measure Name

Components

Cost Center

Materials/Labor Details

Order # Type

Components

Description

Units+

- Mold and Moisture
- Mobile Home Skirting
- Interior or Exterior Wall Repair
- Ceiling or Floor Repair
- Plumbing or Sewer Repair
- Electrical Repair or Upgrade
- Crawl Space Accessibility
- Remediate Excessive Clutter or Hoarding
- Chimney Liner Repair or Replacement
- Integrated Pest Management
- Radon Mitigation
- Other

Changes to Work Order:

Additions to the Work Order Type includes Priority List and Callback.

Work Order Type	Priority List
	Weatherization
	Re-Weatherization
	Standalone
	Callback
	Response to Client Request
	Priority List
	Other

WORK ORDER

And adding Expansion Measures under Standalone and are now required fields.

Work Order Type	Standalone
Standalone Type	
	Emergency
	Non-Emergency
	Non-Specified
	Expansion Measures

Work Order Type will have an abbreviated reference in a black box which will be used for reporting purposes. Example:

Event Type	Wx
Work Order Type	Weatherization

Event Type	RWx
Work Order Type	Re-Weatherization

Event Type	S-E
Work Order Type	Standalone
Standalone Type	Emergency

Event Type	S-NE
Work Order Type	Standalone
Standalone Type	Non-Emergency

Event Type	S-EXP
Work Order Type	Standalone
Standalone Type	Expansion Measures

Event Type	CB
Work Order Type	Callback

Event Type
 Work Order Type

You will now notice that the Work Order Economic Summary is different. We have added estimated and actual costs, both material and labor, for various categories for a convenient snapshot of the work order.

Work Order Economic Summary 18 Measures				
	Est Material	Est Labor	Act Material	Act Labor
ECM	\$1,663.69	\$513.92	\$1,663.69	\$513.92
HSM	\$500.00	\$750.00	\$500.00	\$750.00
IRM	\$50.00	\$25.00	\$50.00	\$25.00
OTHER	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00
TOTALS	\$3,713.69	\$2,788.92	\$3,713.69	\$2,788.92
	\$6,502.61		\$6,502.61	

This is also carried through to the work order for contractors to see.

TOTALS	Estimated		Actual	
	Material	Labor	Material	Labor
ECM	\$3,525.66	\$575.17		
HSM				
IRM	\$50.00			
OTHER				
TOTAL	\$3,575.66	\$575.17		
	\$4,150.83			

Client Name: Doe, John Client ID: lund Alt. Client ID:
 Work Order (ReportID 16) SP Version 8.12.04 Run 9/19/2023 Page 11 of 12

When you navigate to the Measures Tab, you will notice some additional changes and new features.

You will now see quick references for Measure Types in bold abbreviations – **IRM**, **HSM**, **ECM**, and **OTHER**.

Order # Active **IRM**
 Measure Type

Order # Active **HSM**
 Measure Type

Order # Active **ECM**
 Measure Type

Order # Active **OTHER** Copy Library Mea
 Measure Type

You will also notice each measure/sub measure type will have an abbreviated reference in a black box which will be used for reporting purposes. Example:

Measure Type Baseloads EXP Water Heater Replacement EXP-DWH-Rep

Changes to the bottom right corner of the work order has changed to include a breakdown of material and labor for both estimate and actual costs.

	Estimated	Actual
Material	\$15.69	\$15.69
Labor	\$2.97	\$2.97
Total	\$18.66	\$18.66
SIR	13.9	13.9

As you navigate to the bottom left under the Measures drop list, you will find additional details available as a snapshot of the work order. You will see the categories of all the measures under **Group – IRM, HSM, ECM, and OTHER**. You will also be able to tell if anything is **MISSING** under Measure Type, Sub Measure Type, or Cost Center. If it does not apply, you will see an **NA**.

MEASURES
 by Measure Name [dropdown]
 [Navigation icons] 3 of 18 [New] [Copy] [Del]

Order	Name	Active	Group	Measure Type	Sub Type	Cost Center
1	General Air Sealing	Yes	ECM	MISSING	NA	MISSING
2	Lighting Replacements	Yes	ECM	Baseloads	LED Bulb Replacement	MISSING
3	Lighting Replacements	Yes	ECM	Baseloads	MISSING	MISSING
4	Add Shade Screens	Yes	ECM	Doors and Windows	NA	MISSING
5	DWH Pipe Insulation	Yes	ECM	Baseloads	Pipe Insulation	MISSING
6	DWH Tank Insulation	Yes	ECM	Baseloads	MISSING	MISSING
7	Refrigerator Replacement	Yes	ECM	Baseloads	Refrigeration	MISSING
8	Setback [heating]	Yes	ECM	HVAC Systems	Thermostat	MISSING
9	Glass Storm Windows	Yes	ECM	Doors and Windows	NA	MISSING
10	Window Sealing	Yes	ECM	Doors and Windows	NA	MISSING
11	Window Sealing	Yes	ECM	Doors and Windows	NA	MISSING
12	Roof Cellulose Loose [Addition]	Yes	ECM	Building Insulation	NA	MISSING
13	Tune Cooling System	Yes	ECM	HVAC Systems	HVAC System Repair	MISSING
14	Replace Doors Mandatory	Yes	ECM	Doors and Windows	NA	MISSING
15	Repair door	Yes	IRM	Incidental Repairs	NA	MISSING
16	Repair flue	Yes	IRM	Incidental Repairs	NA	MISSING
17	Dryer Venting	Yes	HSM	Health and Safety	Mechanical Ventilation	MISSING
18	DWH	Yes	OTHER	Baseloads	EXP Water Heater Rep	MISSING

Lastly, you will now get notifications if you are missing Measure Types, Sub Measure Types, or Cost Centers when you change payment statuses of work orders to **Invoice Approved On** or **Invoice Paid On**. You will also get these notifications when you change the audit to **Audit Complete and Locked On**.

