

Job Data

Program: _____ Service Date: _____ Service Time: _____

Contact Information

First Name: _____ Last Name: _____ Email: _____

Phone: _____ Address 1: _____ Address 2: _____

City: _____ State: _____ Zip: _____ ☐ Owner ☐ Renter

Building Information

Year Built: _____ Conditioned Area (Sq/Ft): _____ Area Incl. Basement?: ☐ Yes ☐ No Average Wall Height: _____

House Length: _____ House Width: _____ Floors Above Grade: _____ # of Occupants: _____ # of Bedrooms: _____

Type of Home: ☐ Apartment ☐ Condominium ☐ Single Family Detached Orientation: N / NE / E / SE / S / SW / W / NW

☐ Single Family Attached (Duplex) ☐ Mobile # of Units in Building (multi-family only): _____

Tuck-under Garage: ☐ Yes ☐ No # of cars: _____ Shielding: ☐ Well-Shielded ☐ Normal ☐ Exposed

Utility Account Info

Electric Utility Provider Name: _____

Fuel Utility Provider Name: _____

Electric Account #: _____

Fuel Account #: _____

Utility Bills - Detailed

Electric Bill Units: ☐ Dollars ☐ kWh

Start Bill Date: _____

End Bill Date: _____ Amount: _____

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

7 _____

8 _____

9 _____

10 _____

11 _____

12 _____

Primary Heating Fuel Type:

☐ Electricity ☐ Fuel Oil ☐ Natural Gas

☐ Propane ☐ Solar ☐ Pellets ☐ Wood

Fuel Bill Units: ☐ Dollars ☐ Gallons ☐ Therms

Start Bill Date: _____

End Bill Date: _____ Amount: _____

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

7 _____

8 _____

9 _____

10 _____

11 _____

12 _____

Utility Bills - Simple

Electric Bill in the last 12 months:

Highest monthly summer electric bill (\$): _____ Lowest monthly electric bill when not on vacation (\$): _____

Heating Bill in the last 12 months (If heating fuel type is Natural Gas or Electric):

Highest monthly winter heating bill (\$): _____ Lowest monthly fuel bill when not on vacation (\$): _____ (blank if all electric)

If fuel type is Fuel Oil or Propane:

Gallons of used in the last 12 months: _____ - OR - Dollars spent in the last 12 months (\$): _____

If fuel type is Wood or Pellets: Price: _____ Total cost in the last 12 months: _____ ☐ If fuel type is Solar

Thermostat Set-points (°F)

Programmable: ☐ Yes ☐ No Heating (at home) _____ Heating (not home) _____ Cooling (at home) _____ Cooling (not home) _____

HVAC System 1

System Equipment Type:

Heating:

- ☐ Boiler
- ☐ Furnace with standalone ducts
- ☐ Electric Resistance
- ☐ Direct Heater
- ☐ Stove or Insert
- ☐ Solar Thermal

Cooling:

- ☐ Central AC with standalone ducts
- ☐ Room AC
- ☐ Evaporative Cooler - Direct
- ☐ Evaporative Cooler - Ducted

Both Heating and Cooling:

- ☐ Ductless Heat Pump
- ☐ Central Heat Pump (shared ducts)
- ☐ Furnace / Central AC (shared ducts)

Upgrade action:

- ☐ Replace with a newer model
- ☐ Keep an existing system as is
- ☐ Remove a system permanently
- ☐ Install a new non-existing system

Heating Energy Source: ☐ Electricity ☐ Natural Gas ☐ Propane ☐ Fuel Oil ☐ Pellets ☐ Wood ☐ Solar

HEATING

Total Load %: _____ **Capacity:** _____ **Model Year:** _____ **System Efficiency (AFUE):** _____

Output Capacity(BTU/h): _____ **Manufacturer:** _____ **Model #:** _____

COOLING

Total Load %: _____ **Capacity:** _____ **Model Year:** _____ **System Efficiency (SEER):** _____

Output Capacity(BTU/h): _____ **Manufacturer:** _____ **Model #:** _____

System 1 Duct Work

Duct Location:

- ☐ Attic (unconditioned)
- ☐ Basement (unconditioned)
- ☐ Intentionally Conditioned Space
- ☐ Crawlspace (unconditioned)
- ☐ 50/50 Attic / Basement (both unconditioned)
- ☐ 50/50 Attic (unconditioned) / Conditioned Space
- ☐ 50/50 Attic / Crawlspace (both unconditioned)
- ☐ 50/50 Basement (unconditioned) / Conditioned Space
- ☐ 50/50 Crawlspace (unconditioned) / Conditioned Space
- ☐ 70/30 Conditioned Space / Garage (unconditioned)

Duct Sealing:

- ☐ 30% - Very leaky
- ☐ 15% - Somewhat leaky
- ☐ 6% - Well sealed
- ☐ 3% - Very tight
- ☐ Measured (cfm25)

Duct Leakage (CFM25):

Duct Insulation:

- ☐ None
- ☐ Duct board 1"
- ☐ Duct board 1.5"
- ☐ Duct board 2"
- ☐ Fiberglass 1.25"
- ☐ Fiberglass 2"
- ☐ Fiberglass 2.5"
- ☐ Reflective bubble wrap

Duct R-Value:

HVAC System 2

System Equipment Type:

Heating:

- ☐ Boiler
- ☐ Furnace with standalone ducts
- ☐ Electric Resistance
- ☐ Direct Heater
- ☐ Stove or Insert
- ☐ Solar Thermal

Cooling:

- ☐ Central AC with standalone ducts
- ☐ Room AC
- ☐ Evaporative Cooler - Direct
- ☐ Evaporative Cooler - Ducted

Both Heating and Cooling:

- ☐ Ductless Heat Pump
- ☐ Central Heat Pump (shared ducts)
- ☐ Furnace / Central AC (shared ducts)

Upgrade action:

- ☐ Replace with a newer model
- ☐ Keep an existing system as is
- ☐ Remove a system permanently
- ☐ Install a new non-existing system

Heating Energy Source: ☐ Electricity ☐ Natural Gas ☐ Propane ☐ Fuel Oil ☐ Pellets ☐ Wood ☐ Solar

HEATING

Total Load %: _____ **Capacity:** _____ **Model Year:** _____ **System Efficiency (AFUE):** _____

Output Capacity(BTU/h): _____ **Manufacturer:** _____ **Model #:** _____

COOLING

Total Load %: _____ **Capacity:** _____ **Model Year:** _____ **System Efficiency (SEER):** _____

Output Capacity(BTU/h): _____ **Manufacturer:** _____ **Model #:** _____

System 2 Duct Work

Duct Location:

- ☐ Attic (unconditioned)
- ☐ Basement (unconditioned)
- ☐ Intentionally Conditioned Space
- ☐ Crawlspace (unconditioned)
- ☐ 50/50 Attic / Basement (both unconditioned)
- ☐ 50/50 Attic (unconditioned) / Conditioned Space
- ☐ 50/50 Attic / Crawlspace (both unconditioned)
- ☐ 50/50 Basement (unconditioned) / Conditioned Space
- ☐ 50/50 Crawlspace (unconditioned) / Conditioned Space
- ☐ 70/30 Conditioned Space / Garage (unconditioned)

Duct Sealing:

- ☐ 30% - Very leaky
- ☐ 15% - Somewhat leaky
- ☐ 6% - Well sealed
- ☐ 3% - Very tight
- ☐ Measured (cfm25)

Duct Leakage (CFM25):

Duct Insulation:

- ☐ None
- ☐ Duct board 1"
- ☐ Duct board 1.5"
- ☐ Duct board 2"
- ☐ Fiberglass 1.25"
- ☐ Fiberglass 2"
- ☐ Fiberglass 2.5"
- ☐ Reflective bubble wrap

Duct R-Value:

HVAC System 3

System Equipment Type:

Heating:

- ☐ Boiler
- ☐ Furnace with standalone ducts
- ☐ Electric Resistance
- ☐ Direct Heater
- ☐ Stove or Insert
- ☐ Solar Thermal

Cooling:

- ☐ Central AC with standalone ducts
- ☐ Room AC
- ☐ Evaporative Cooler - Direct
- ☐ Evaporative Cooler - Ducted

Both Heating and Cooling:

- ☐ Ductless Heat Pump
- ☐ Central Heat Pump (shared ducts)
- ☐ Furnace / Central AC (shared ducts)

Upgrade action:

- ☐ Replace with a newer model ☐ Keep an existing system as is
☐ Remove a system permanently ☐ Install a new non-existing system

Heating Energy Source: ☐ Electricity ☐ Natural Gas ☐ Propane ☐ Fuel Oil ☐ Pellets ☐ Wood ☐ Solar

HEATING

Total Load %: _____ **Capacity:** _____ **Model Year:** _____ **System Efficiency (AFUE):** _____

Output Capacity(BTU/h): _____ **Manufacturer:** _____ **Model #:** _____

COOLING

Total Load %: _____ **Capacity:** _____ **Model Year:** _____ **System Efficiency (SEER):** _____

Output Capacity(BTU/h): _____ **Manufacturer:** _____ **Model #:** _____

System 3 Duct Work

Duct Location:

- ☐ Attic (unconditioned)
☐ Basement (unconditioned)
☐ Intentionally Conditioned Space
☐ Crawlspace (unconditioned)
☐ 50/50 Attic / Basement (both unconditioned)
☐ 50/50 Attic (unconditioned) / Conditioned Space
☐ 50/50 Attic / Crawlspace (both unconditioned)
☐ 50/50 Basement (unconditioned) / Conditioned Space
☐ 50/50 Crawlspace (unconditioned) / Conditioned Space
☐ 70/30 Conditioned Space / Garage (unconditioned)

Duct Sealing:

- ☐ 30% - Very leaky
☐ 15% - Somewhat leaky
☐ 6% - Well sealed
☐ 3% - Very tight
☐ Measured (cfm25)

Duct Leakage (CFM25):

Duct Insulation:

- ☐ None
☐ Duct board 1"
☐ Duct board 1.5"
☐ Duct board 2"
☐ Fiberglass 1.25"
☐ Fiberglass 2"
☐ Fiberglass 2.5"
☐ Reflective bubble wrap

Duct R-Value:

Appliances

Range Fuel: ☐ Natural Gas ☐ Electric ☐ Propane ☐ None

Oven Fuel: ☐ Natural Gas ☐ Electric ☐ Propane ☐ None

Energy Star Clothes Washer?: ☐ Yes ☐ No

Dishwasher Installed?: ☐ Yes ☐ No

Energy Star Dishwasher?: ☐ Yes ☐ No

Freezer 1: _____

Freezer 2: _____

Freezer 3: _____

Energy Star? ☐ Yes ☐ No

Energy Star? ☐ Yes ☐ No

Energy Star? ☐ Yes ☐ No

Refrigerators

Refrigerator # 1 **Age:** ☐ 0-14 ☐ 15-21 ☐ 22-24 ☐ 25-26 ☐ 27-30 ☐ 31-34 ☐ 35-42 ☐ 42+

Size: ☐ 1-5 ☐ 6-12 ☐ 13-15 ☐ 16-18 ☐ 19-21 ☐ 22+

Energy Star: ☐ Yes ☐ No

Refrigerator # 3 **Age:** ☐ 0-14 ☐ 15-21 ☐ 22-24 ☐ 25-26 ☐ 27-30 ☐ 31-34 ☐ 35-42 ☐ 42+

Size: ☐ 1-5 ☐ 6-12 ☐ 13-15 ☐ 16-18 ☐ 19-21 ☐ 22+

Energy Star: ☐ Yes ☐ No

Lighting

% CFLs or LEDs: ☐ 0% ☐ 1-25% ☐ 26-50% ☐ 51-75% ☐ 76-99% ☐ 100%

Total # of Bulbs: _____

Doors

Door 1 Type:

- ☐ Steel, hollow ☐ Steel, hollow with storm ☐ Steel, insulated ☐ Steel, insulated with Storm ☐ Wood ☐ Wood with Storm
☐ Fiberglass ☐ Fiberglass with Storm ☐ 1/2-Lite Steel, insulated ☐ 1/2-Lite Steel, insulated with Storm ☐ 1/2-Lite Wood
☐ 1/2-Lite Wood with Storm ☐ 1/2-Lite Fiberglass ☐ 1/2-Lite Fiberglass with Storm

Door 2 Type:

- ☐ Steel, hollow ☐ Steel, hollow with storm ☐ Steel, insulated ☐ Steel, insulated with Storm ☐ Wood ☐ Wood with Storm
☐ Fiberglass ☐ Fiberglass with Storm ☐ 1/2-Lite Steel, insulated ☐ 1/2-Lite Steel, insulated with Storm ☐ 1/2-Lite Wood
☐ 1/2-Lite Wood with Storm ☐ 1/2-Lite Fiberglass ☐ 1/2-Lite Fiberglass with Storm

Exterior Walls

% Walls Shared (multi-family): North wall: _____ East wall: _____ South wall: _____ West wall: _____

Wall 1 Insulated? ☐ Well ☐ Poorly ☐ Yes ☐ No

Wall 1 Siding: ☐ Brick veneer ☐ Metal/vinyl siding ☐ Shingle/Composition ☐ Stone veneer
☐ Stucco ☐ Wood/Fiber Cement siding ☐ Other

Wall 1 Construction: ☐ Concrete Block ☐ Full Brick ☐ 2x4 Frame ☐ 2x6 Frame ☐ Log ☐ Straw Bale

Wall 2 Insulated? ☐ Well ☐ Poorly ☐ Yes ☐ No

Wall 2 Siding: ☐ Brick veneer ☐ Metal/vinyl siding ☐ Shingle/Composition ☐ Stone veneer
☐ Stucco ☐ Wood/Fiber Cement siding ☐ Other

Wall 2 Construction: ☐ Concrete Block ☐ Full Brick ☐ 2x4 Frame ☐ 2x6 Frame ☐ Log ☐ Straw Bale

Attic / Vault

% of Ceilings Shared (multi-family): _____

Attic 1 Insulation depth (in): ☐ 0 ☐ 1-3 ☐ 4-6 ☐ 7-9 ☐ 10-12 ☐ 13-15 ☐ 16+

Attic 1 Insulation type: ☐ Fiberglass or Rockwool (batts or blown) ☐ Cellulose ☐ Spray foam **Vault 1 Insulated?** ☐ Well ☐ Poorly ☐ Yes ☐ No

Attic 2 Insulation depth (in): ☐ 0 ☐ 1-3 ☐ 4-6 ☐ 7-9 ☐ 10-12 ☐ 13-15 ☐ 16+

Attic 2 Insulation type: ☐ Fiberglass or Rockwool (batts or blown) ☐ Cellulose ☐ Spray foam **Vault 2 Insulated?** ☐ Well ☐ Poorly ☐ Yes ☐ No

Attic/Vault %: Attic 1 _____ Attic 2 _____ Vault 1 _____ Vault 2 _____

Foundation

Makeup: Basement _____ % Crawl _____ % Slab _____ % **Above grade height (Ft):** _____ **% of floors shared w/below:** _____

Basement Wall Insulation:

- ☐ None or Bare Walls
☐ Fiberglass blanket
☐ Unfinished frame wall with fiberglass batts
☐ Finished wall without Insulation
☐ Finished wall with Insulation

Basement Heating:

- ☐ Intentional
☐ Intentional w/ continuous circulation
☐ Incidental-Desired (e.g. leaky ducts)
☐ None or Undesired Incidental

Basement Cooling:

- ☐ Intentional
☐ Intentional w/ continuous circulation
☐ Incidental-Desired (e.g. leaky ducts)
☐ None or Undesired Incidental

Crawlspace Insulation:

- ☐ Crawlspace has insulation installed on the exterior wall area
☐ Crawlspace has insulation installed under only the living space floor
☐ Crawlspace is uninsulated

Crawlspace Type:

- ☐ Unvented - Unconditioned Crawl
☐ Vented - Year Round
☐ Vented - Summer Only
☐ Conditioned Crawl

Windows

Skylights Area(ft²): _____

Window System 1	Type:	Frame:	Window Venting Used: <input type="checkbox"/> Yes <input type="checkbox"/> No	Window Area %:	Overhang Depth(Ft):
	<input type="checkbox"/> Single pane	<input type="checkbox"/> Metal		North : _____	North : _____
	<input type="checkbox"/> Single pane + storm	<input type="checkbox"/> Vinyl		East : _____	East : _____
	<input type="checkbox"/> Double pane	<input type="checkbox"/> Wood or metal clad		South : _____	South : _____
	<input type="checkbox"/> Double pane + low e			West: _____	West: _____
	<input type="checkbox"/> Triple pane + low e				
Window System 2	Type:	Frame:		Window Area %:	Overhang Depth(Ft):
	<input type="checkbox"/> Single pane	<input type="checkbox"/> Metal		North : _____	North : _____
	<input type="checkbox"/> Single pane + storm	<input type="checkbox"/> Vinyl		East : _____	East : _____
	<input type="checkbox"/> Double pane	<input type="checkbox"/> Wood or metal clad		South : _____	South : _____
	<input type="checkbox"/> Double pane + low e			West: _____	West: _____
	<input type="checkbox"/> Triple pane + low e				

Air Leakage

Blower Door Test Performed: ☐ Tested ☐ Estimate Base CFM50 (depressurized leakage to outside): _____

Hot Water (DHW)

WATER HEATER 1

Fuel Type:	System Type:	% of Total DWH Load: _____
<input type="checkbox"/> Electricity	<input type="checkbox"/> Standard Tank	Age: <input type="checkbox"/> 0-5 <input type="checkbox"/> 6-10 <input type="checkbox"/> 11-15 <input type="checkbox"/> 16-20 <input type="checkbox"/> 21-25 <input type="checkbox"/> 26-30 <input type="checkbox"/> 31-35 <input type="checkbox"/> 36+
<input type="checkbox"/> Natural Gas	<input type="checkbox"/> Tank with extra insulation	Location: <input type="checkbox"/> Indoors and within heated area
<input type="checkbox"/> Fuel Oil	<input type="checkbox"/> Heat Pump	<input type="checkbox"/> Garage or Unconditioned Space
<input type="checkbox"/> Propane	<input type="checkbox"/> Tankless (on-demand)	<input type="checkbox"/> Outbuilding
<input type="checkbox"/> Solar	<input type="checkbox"/> Sidearm Tank (set EF manually)	Settings: <input type="checkbox"/> Low (120-130° F) <input type="checkbox"/> Medium (130-140° F)
		<input type="checkbox"/> High (140-150° F) <input type="checkbox"/> Very High (150°+ F)

WATER HEATER 2

Fuel Type:	System Type:	% of Total DWH Load: _____
<input type="checkbox"/> Electricity	<input type="checkbox"/> Standard Tank	Age: <input type="checkbox"/> 0-5 <input type="checkbox"/> 6-10 <input type="checkbox"/> 11-15 <input type="checkbox"/> 16-20 <input type="checkbox"/> 21-25 <input type="checkbox"/> 26-30 <input type="checkbox"/> 31-35 <input type="checkbox"/> 36+
<input type="checkbox"/> Natural Gas	<input type="checkbox"/> Tank with extra insulation	Location: <input type="checkbox"/> Indoors and within heated area
<input type="checkbox"/> Fuel Oil	<input type="checkbox"/> Heat Pump	<input type="checkbox"/> Garage or Unconditioned Space
<input type="checkbox"/> Propane	<input type="checkbox"/> Tankless (on-demand)	<input type="checkbox"/> Outbuilding
<input type="checkbox"/> Solar	<input type="checkbox"/> Sidearm Tank (set EF manually)	Settings: <input type="checkbox"/> Low (120-130° F) <input type="checkbox"/> Medium (130-140° F)
		<input type="checkbox"/> High (140-150° F) <input type="checkbox"/> Very High (150°+ F)

Pools and Hot Tubs

Swimming Pool: <input type="checkbox"/> Yes <input type="checkbox"/> No	Hot Tub: <input type="checkbox"/> Yes <input type="checkbox"/> No
Pump Type: <input type="checkbox"/> Single Speed <input type="checkbox"/> Two Speed <input type="checkbox"/> Variable Speed <input type="checkbox"/> No Pump	
Pump Horsepower: <input type="checkbox"/> 0.5 <input type="checkbox"/> 0.75 <input type="checkbox"/> 1 <input type="checkbox"/> 1.5 <input type="checkbox"/> 2 <input type="checkbox"/> 3	Pump Speed Turnover: _____

PV

Array Size(kW): _____ Array Slope(°): _____ Array Orientation(°): _____ Year Modules Manufactured: _____