Audit Report Documentation
EmPCalc 5.3.4

Model your proposed measures as you normally would in EmPCalc on the specific measure tabs. When ready to build your audit report, navigate to the Cover tab.

Cover

Changes to the Cover tab:

To the right of the "Measure Proposed" selection, there are now "Package Assignment" columns that allow you to assign a measure to specific Audit Package. There are up to three Audit Package options (P1, P2, P3). Measures are assigned a package by selecting the box next to the appropriate package.

In the example below, P1 (Package 1) includes the LED Lightbulbs measure, P2 (Package 2) includes the LED Lightbulbs measure and the Refrigerator Replacement measure, and P3 (Package 3) includes the LED Lightbulbs measure, the Refrigerator Replacement measure, and the Freezer Replacement measure.

Once you have selected the measures you wish to propose on each package, navigate to the Audit Report tab.

Audit Report

To begin working on your Audit Report click the "Prepare Audit Report Template" button to the left of the editable Audit Report Template. This will push the information entered throughout EmPCalc to the Audit Report Template.
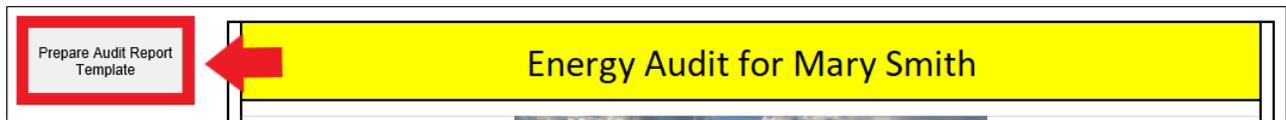

How the Audit Report Template Works:

The Audit Report Template has been populated with default language and images. You are free to use these defaults but are encouraged to personalize the Audit Report to fit your company and customer needs.

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All <mark>highlighted</mark> cells throughout the report are editable.

To prevent a cell that has been edited from being overridden by the defaults, should you have to make changes to the Audit Report, fill the cell with "No fill".
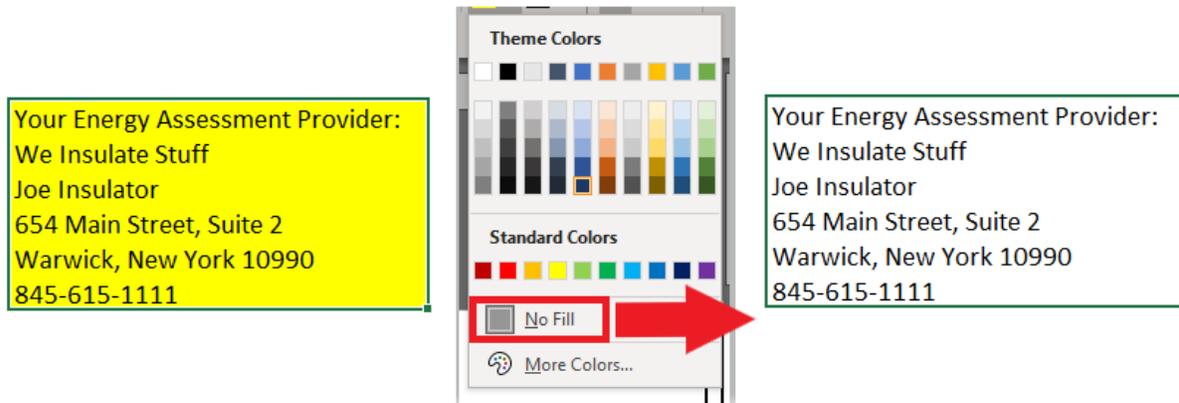
To upload images unique to your company or the customer click into the box around the default images.

Sections of the Audit Report:

Customer and Contractor contact information
- o The Customer's information will populate from the Cover tab.
- o The Contractor information will partially populate from the Cover tab.
- o Contractor logo can be added to this section to the right of the Contractor information.
- o This section also includes legal language that cannot be removed from the Audit Report.

Solutions for the Customer Residence
- o Each measure that was proposed is outlined in this section.
- o Each section populates with default language detailing the benefits of each measure as part of a package.
- o Each section includes a default image related to the measure.
- o Some of the sections also include a "Did you know?" fact that provides the customer with information that can empower them to make small changes to their daily life to conserve energy.

Measure Details for the Customer Residence
- o This section displays a table with each measure's cost, kWh reduced, MMTUB reduced, and Annual Savings.
- o This section also includes legal language that cannot be removed from the Audit Report.

Package Selection
- o This section lays out each proposed package (P1, P2, and P3.)
- o Each package includes a list of measures being proposed, dollar savings, kWh savings, Savings (in heating fuel of home), SIR, and cost.
- o The Contractor Note is a place for you to describe the benefits of choosing each package to the customer.

- o The "Your Impact" section quantifies the package in an easy to understand way for the customer.
- o The Customer Note section is a place for the customer to add any questions or comments they have regarding each package.
- o The "This package best suits my/our needs" is a place where the customer can provide a level of commitment to one of the packages.

Next Steps
- o This section provides the customer with the follow-up steps to selecting a package, if they haven't at the time of the audit, and having work completed.
- o There is also a place for Contractor contact information to be added so that the customer has contact information at the beginning and end of the Audit Report.
- o This section also includes legal language that cannot be removed from the Audit Report.
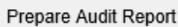
Your Home
- o This section pulls data from EmPCalc regarding the current home, such as age of the home and the number of occupants.
- o Below the current home data there is additional space to add pictures and picture descriptions of the home.

Preparing the Final Audit Report

The "Prepare Audit Report" button is used to create the Final Audit Report.

After pressing the "Prepare Audit Report" button you'll have a preview of your Final Audit Report before printing so that you can make any final changes to the Audit Report Template. If any changes are needed, make them to the Audit Report Template and then push over to the Audit Report again for the changes to stamp down.
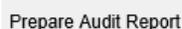
Creating the Audit Report PDF

The "Create Audit Report PDF" button will create a PDF printable version of the Audit Report for distribution to your customer.