

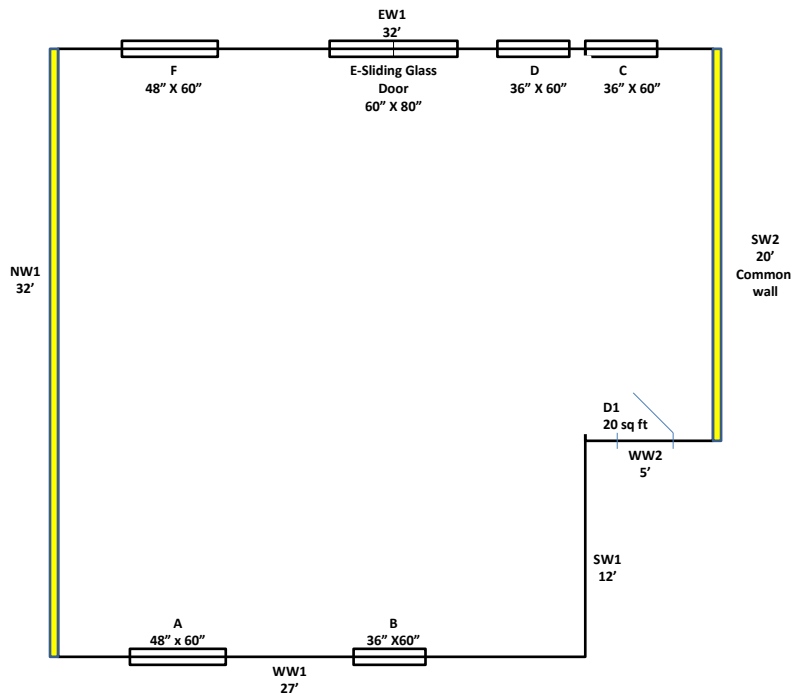
Best Practice – NEAT Copy Function for Multifamily

Date: Revised January 5, 2017

Subject: Speeding up the audit process on Multifamily Housing (MFH) projects.

Problem or Question: I am working on a MFH project and would like to know how to copy an audit in NEAT so that I don't have to repeat entries for units that have identical floor plans.

Discussion: Using the “copy” function in NEAT can save you hours of data input time on MFH projects! It takes a little practice, but follow the step-by-step guide below and you will have it down in no time. Place all identical floor plan units together. It is often easiest to place the assessor's house map on top for a visual identification. Don't worry about the unit's orientation; just make sure the square footage and exterior layout are identical (walls, window, doors). It is helpful to highlight walls that are common to neighboring units. Remember these are NOT entered into NEAT.



Do one floor plan at a time. Enter one client with audit into NEAT. Assess the quality of the audit. Are repairs, energy-saving measures, and Health & Safety items entered correctly? When you are satisfied with this audit---then you can begin to use the copy function.

1. Go to the home page and hit the “CLIENTS” tab (bottom left “CLIENT” box). Find the client information for the first unit that you entered, under this floor plan.
 - a. Hit the “Copy” button and change the following information:
 - i. Client ID
 - ii. Client Name
 - iii. Apartment number
 - iv. Occupant information

- b. Go to the “Contacts” tab and complete the information
 - c. DO NOT go to the “Audit” tab to start this audit! Close this screen out.
2. You should now be back at the “Home Page” of NEAT. Select the “Site Built (NEAT)” tab. Make sure you are on the audit for the first unit of this floor plan that you completed. (Apt 100 in screen shot)
 - a. Hit the “Copy” button and change the following information:
 - i. Client ID number
 - ii. If you used the apartment complex name with unit number in the “Audit Name” box—change the apartment number. (Apt 106 in screen shot)
 - iii. Verify the “fuel cost library”; in some areas, the fuel costs vary per client; not service area.
 - iv. When you go to the “Shell” tab you will receive a prompt that says, “This will assign the Audit to the selected Client record. Press “OK.” Notice that the client name and ID in the header are from the previous entry, until you select “OK” — then the name will change to the next client’s information. SUCCESS!

NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT

Audit Name **Audit (5)** Client ID 11LS1234 Client Name Brent, Scott Alt. Client ID Brent

Audit Information | Status | Shell | Heating (1) | Cooling (1) | Ducts/Infiltration | Baseloads | Health & Safety | Itemized Costs (2) | Utility Bills (0) | Photos (0) | Measures (0)

Audit Name East Hills Apt 106 Conditioned Stories 2
Client ID 11LS1235 Floor Area (sq ft) 964
 <Agency Name> Tumbleweed CAP
 Agency State TX Comment 2-STORY BUILDING. USED 17.8 N-FACTOR
 Auditor

Libraries and Other Options
 <Setup Library> Sample Setup Library
 <Fuel Cost Library> .16 ELECTRIC
 <Supply Library> Sample Supply Libr...
 Weather File AUSTINTX.WX
 Billing Adjustment
 Impute Cooling

Weatherization Assistant
 This will assign the Audit to the selected Client record.
 If this is what you intend, press OK, otherwise press Cancel then the ESC key.
 OK Cancel

AUDIT
 by Audit Name by Client ID
 by Client Name by Alternate Client ID
 1 of 5 New Copy Del

REPORT
 Select Report Recommended Measures
 Preview Print Snapshot File

NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT

Audit Name **East Hills Apt 106** Client ID 11LS1235 Client Name Hamilton, Joe Alt. Client ID Hamilton

Audit Information | Status | Shell | Heating (1) | Cooling (1) | Ducts/Infiltration | Baseloads | Health & Safety | Itemized Costs (2) | Utility Bills (0) | Photos (0) | Measures (0)

Audit Name East Hills Apt 106 Conditioned Stories 2
Client ID 11LS1235 Floor Area (sq ft) 964
 <Agency Name> Tumbleweed CAP
 Comment 2-STORY BUILDING. USED 17.8 N-FACTOR

3. Now go tab-by-tab through the audit making the necessary adjustments to the following:
 - a. Start with the “Shell.” Change the wall names, orientation, can insulation as needed. It is easiest to change wall information using the “subform datasheet.” Simply right mouse click and hit prompt.
 - i. Before changing the wall names, you must first number them 1, 2, 3, 4...etc. then rename them as on the house map; otherwise you will receive an error message for ‘duplicate’ names.

Code	Stud Size	Exterior	Exposed To	Orientation	(sq ft)	Measure #	Exist Insl.	Exist R	Add Insl
WW1	2 x 4	Wood	Outside (L	West	256	1	None		Blown Cellulose
NW1	2 x 4	Wood	Outside (L	South	96	1	None		Blown Cellulose
3	2 x 4	Brick o	Outside (L	North		1	None		Blown Cellulose
4	2 x 4	Wood	Outside (L	South		1	None		Blown Cellulose
*	2 x 4			East					
				West					

4. When finished with the walls, go onto windows. Typically, you will need to change the Interior Shading, Exterior Shading (%), and Leakiness for individual windows. However, if there are other differences make changes again using the “subform datasheet” for windows.

Code	Glazing Type	Interior Shading	Exterior Shading (%)	Leakiness	Width (ir	Height
A	Single Pane	Blinds or Shac	25	Medium	48	60
B	Single Pane	Blinds or Shac	25	Medium	36	60
C	Single Pane	Blinds or Shac	25	Medium	36	60
D	Single Pane	Blinds or Shac	50	Loose	36	60
E	Single Pane	Blinds or Shac	50	Very Tight		
F	Single Pane	Blinds or Shac	50	Tight		
*				Medium		
				Loose		
				Very Loose		

5. Repeat process for doors.
6. If different, make changes to the “Attic” and/or “Foundation” entries.
7. Change any “Heating” or “Cooling” data. Apartment complexes tend to change these units out individually as each unit needs. Consequently, you may find various levels of equipment.
8. Under “Ducts/Infiltration,” enter the blower door reading and the Target for After Weatherization. Change the “Duct Blower Measurements.” Make changes to the air infiltration directions in the “Comments” box, and change the “Costs” accordingly.
9. Go through each “Baseload” measure and make changes to Water Heater, Shower Heads, Refrigerator (especially “Metered Consumption” data), and Lighting.
10. Lastly, delete or add “Itemized Costs” measures that are applicable to each individual unit.
11. Hit “Run Audit.”

When copying units in these situations mistakes (disallowed cost) can be multiplied. This could be disastrous for a Subrecipient and WAP in general. Be sure to implement a Quality Control process over these audits.

BELOW IS AN EXAMPLE OF THE RESULTS FROM CHANGES IN MEASURES FROM ONE APARTMENT TO THE NEXT:

FIRST APARTMENT:

Energy Saving Measure Economics

<i>Index</i>	<i>Recommended Measure</i>	<i>Components</i>	<i>Measure Savings (\$/yr)</i>	<i>Measure Cost (\$)</i>	<i>Measure SIR</i>	<i>Cumulative Cost (\$)</i>	<i>Cumulative SIR</i>
1	Infiltration Redctn		172	550	2.6	550	2.6
2	Low Flow Showerheads		572	40	171.9	590	14.1
3	DWVH Pipe Insulation		25	15	17.6	605	14.2
4	DWVH Tank Insulation		25	40	6.5	645	13.7
5	Lighting Retrofits	L1	88	80	6.5	725	12.9
6	Wall Insulation	EW1,SW1,WW1,WW2	192	474	6.1	1199	10.2
7	Sun Screen, Louvered	A,B,C,D,E,F	246	710	4.2	1909	8.0
8	Attic Ins. R-30	A1	201	868	3.5	2777	6.6
9	Smart Thermostat	H1	21	75	3.4	2852	6.5
10	Refrigerator Rplcmnt		108	700	1.8	3552	5.6
11	Install/Replace Heatpump	H1,AC1	331	2400	1.7	5952	4.0
12	Fix Improper Venting of Bathroom Exhaust Fan		0	100	0.0	5503	0.0
13	Smoke Detector is Needed		0	15	0.0	5518	0.0

SECOND APARTMENT:

Energy Saving Measure Economics

<i>Index</i>	<i>Recommended Measure</i>	<i>Components</i>	<i>Measure Savings (\$/yr)</i>	<i>Measure Cost (\$)</i>	<i>Measure SIR</i>	<i>Cumulative Cost (\$)</i>	<i>Cumulative SIR</i>
1	Infiltration Redctn		163	500	2.7	500	2.7
2	Low Flow Showerheads		286	40	86.0	540	8.9
3	DWVH Pipe Insulation		25	15	17.6	555	9.1
4	DWVH Tank Insulation		25	40	6.5	595	9.0
5	Lighting Retrofits	L1	88	80	6.5	675	8.7
6	Wall Insulation	EW1,EW2,NW1,WW1	185	474	5.9	1149	7.5
7	Smart Thermostat	H1	26	75	4.1	1224	7.3
8	Sun Screen, Louvered	A,B,C,D,E,F	224	710	3.8	1934	6.0
9	Attic Ins. R-30	A1	203	868	3.6	2802	5.3
10	Install/Replace Heatpump	H1,AC1	333	2400	1.7	5202	3.6
11	Refrigerator Rplcmnt		60	700	1.0	5902	3.3
12	Fix Wiring Problems (Attic)		0	50	0.0	5952	0.0
13	Smoke Detector is Needed		0	15	0.0	5967	0.0

Recommendation Summary: Utilize the process identified above to “copy” audits for similar multifamily units. Make sure your NEAT has all relevant and specific information inputted in for each individual unit to allow for the most cost-effective results. Contact Department program staff if you have any questions or need additional clarification.