

# IBA HEC IBAEnergy.org Step By Step User Guide For Auditors

## Job Status

- Auditor Assigned (Initial Audit) = Auditor to perform and submit initial audit.
- Deferred (mold, etc.) = House is pending resolution of deferral.
- Initial audit/W.O. Submitted = Production team to review, modify and approve initial forms and work order.
- Initial audit/W.O. Incomplete or Redo = Job pending as production team is waiting on auditor for additional information/forms.
- Initial W.O. Approved = Kim to assign job to contractors.
- Sub-contractor work in progress = HVAC, Plumbing, and Electrical subcontractors to perform work.
- Sub-contractor work submitted = HVAC, Plumbing, and Electrical subcontractors completed work and submitted forms on-line. IBA will approve and notify auditor to perform interim audit.
- Auditor to perform Interim Audit = Auditor to perform and submit interim audit.
- Interim Audit – Failed = IBA will review and notify appropriate subcontractor of necessary re-work.
- Interim audit completed / Shell work in progress = Shell contractor to perform work.
- Shell contractor work submitted = Shell contractor completed work and submitted forms on-line. IBA will approve and notify auditor to perform final audit.
- Auditor to perform final audit = Auditor to perform and submit final audit.
- Final audit submitted = County Energy Managers review and approve final audit.
- Final Audit – Failed - IBA will review and notify appropriate contractor of necessary re-work.
- Final Job Approval = Job completed and approved by IBA.

## Accept or Decline Jobs

- Go to [www.ibaenergy.org](http://www.ibaenergy.org), enter your User Name and Password
- Go to “Job Assignments” to see list of jobs to either accept or decline
- Select Job Number
- Either Accept or Decline Job

## Upload and Enter Forms

- Go to [www.ibaenergy.org](http://www.ibaenergy.org), enter your User Name and Password
- Go to Review JobSites
- Enter the Client ID number in the Job Number location click “Search” Or At View Mode, use the drop down menu, select Jobs by Status, Days in Status to view your clients grouped by job status, find the client ID you want from the list and click on the “Job Number”
- Confirm you have selected the correct client, address & county
- Click on Forms at the top of the page
- Under New Forms: Complete all appropriate information on the Dwelling Info and Building Specifications Form and the Blower Door Testing Results Forms
- When complete Click “Save the form as completed”
- If you need to edit the form after saving click “Edit” located next to the form
- Click “Upload” at the top of the page and upload the following for Initial Audits:
  - A. Signed Moisture Assessment (must be uploaded individually) (Use PDF Format)
  - B. Other forms and documentation (client consent, furnace, water heater, gas cook stove, daily safety test-out/worst case draft testing, 7-10 jpg pictures, sketch of residence, etc.) (Use PDF Format)
  - E. Initial Audit Invoice (PDF Format)
  - F. Other documentation as needed

- Type a description for the items to be uploaded
- Select type of files: PDF, Pictures or Other
- You may see a display saying “This page contains both secure and nonsecure items. Do you want to display the nonsecure items?” Click “Yes”
- Click “Add Files”
- Select items located on your computer to upload
- Select “Upload Files”
- Once all items are uploaded click “Return to original page”

### **Create a New Work Order**

- Go to [www.ibaenergy.org](http://www.ibaenergy.org), enter your User Name and Password
- Go to Review JobSites
- Enter the Client ID number in the Job Number location click “Search” Or At View Mode, use the drop down menu, select Jobs by Status, Days in Status to view your clients grouped by job status, find the client ID you want from the list and click on the “Job Number”
- Confirm you have selected the correct client, address & county. You’ll see across the top; Return to Job Selection, Forms, & Upload. You’ll also notice that W.O. Site Type & W.O Print are not highlighted or available. You will need to create the work in step #5 in order to input data.
- Scroll down, at the “Job Site Type” box select either site built, mobile home, or multi-family
- Scroll to the bottom of the page at “Action to take” select “Update” and click “Take Action”
- Work Order and W.O. Print are now available for you to select.

### **Enter Data Into A Work Order**

- Go to [www.ibaenergy.org](http://www.ibaenergy.org), enter your User Name and Password
- Go to Review JobSites
- Enter the Client ID number in the Job Number location click “Search” Or At View Mode, use the drop down menu, select Jobs by Status, Days in Status to view your clients grouped by job status, find the client ID you want from the list and click on the “Job Number”
- Confirm you have selected the correct client, address & county.
- Select Work Order
- Quantity requirements such as each, lineal feet, square feet, etc are located next to the material cost, and vary from item to item, please use the correct measure of quantity.
- Include descriptions, instructions & notes under each item to help contractors in ordering materials and completing the job.
- Scroll to the bottom or hit “End of Page” located under work order notes
- Job costs are listed and totaled by:
  - Health and Safety (average \$865 per home)
  - Base Costs includes Other but not H&S avg. per home \$3,000-3,500
  - Other (not to exceed \$500)
  - Shell, HVAC, Plumbing, & Electrical Totals
  - Work Order Total
  - \*Hitting “Refresh W.O.” will compute costs.
- Move to the “next section” with the button, or by using the drop down menu and Hitting “Go to Section”
- Directions for using Special Circumstance Section:
  - At Action By, use drop down menu to select which contractor is needed to perform your desired item.
  - At the Job Section drop down menu, place your item in the desired Category ie. Health & Safety, Furnace Tune Up, etc.
  - Enter quantity, your recommended material cost and labor costs for item or job.

- Included on the drop down menu under the Go to Section located at the bottom of each section are 5 other items, Electrical Contractor, HVAC Contractor, Plumbing Contractor, Shell Contractor, and Combined Contractor. Use these selections to quickly see the work order you are creating minus all items with zeros or view work orders for a specific contractor.
- Additional Work Order Notes can be entered at the top of section and will be printed on each work order.
- Review and confirm you have your work order the way you want it.
- Once your work order is completed hit “Save W.O. and Return”
- Complete and upload all necessary forms.
- Scroll to the bottom of the page at “Action to take” select “Submit Initial Work Order” and hit “Take Action”
- Your Work Order has been submitted to IBA for Approval & Review.

### **Print Work Order:**

- Go to [www.ibaenergy.org](http://www.ibaenergy.org), enter your User Name and Password
- Go to Review JobSites
- Enter the Client ID number in the Job Number location click “Search” Or At View Mode, use the drop down menu, select Jobs by Status, Days in Status to view your clients grouped by job status, find the client ID you want from the list and click on the “Job Number”
- Confirm you have selected the correct client, address & county.
- Select “W.O.Print”
- Select the view you would like to see or print
- Answer “Open” When prompted if you would like to Save or Open this file
- Select Print
- “Return to Job” Will take you back to the Client’s Main Page

### **Defer A Client:**

- Go to [www.ibaenergy.org](http://www.ibaenergy.org), enter your User Name and Password
- Go to Review JobSites
- Enter the Client ID number in the Job Number location click “Search” Or find the client ID you want from the list and click “Select” Confirm you have the correct client, address & county.
- Click on Forms at the top of the page
- Under New Forms, Select IBA Home Energy Conservation Program Health & Safety Inspection / Deferral Checklist
- Complete Form then click “Save the form as completed”
- If you need to edit the form after saving click “Edit” located next to the form
- Click “Upload” at the top of the page and upload the following required documentation.
  - Signed Moisture Assessment (Use PDF Format)
  - 3 to 5 pictures showing reasons deferred (JPEG or TIFF)
  - Other documentation as needed to support deferral
- Type a description for the items to be uploaded
- Select type of files: PDF, Pictures or Other
- You may see a display saying “This page contains both secure and nonsecure items. Do you want to display the nonsecure items?” Click “Yes”
- Click “Add Files”
- Select items located on your computer to upload
- Select “Upload Files”
- Once all items are uploaded click “Return to original page”

- Scroll to the bottom of the page at the “Action to take” drop down tab select “Defer Job” and click “Take Action”

### **Review Contractor Completion Forms Prior to Interim or Final Inspections**

- Go to [www.ibaenergy.org](http://www.ibaenergy.org), enter your User Name and Password
- Go to Review JobSites
- Enter the Client ID number in the Job Number location click “Search” Or At View Mode, use the drop down menu, select Jobs by Status, Days in Status to view your clients grouped by job status, find the client ID you want from the list and click on the “Job Number”
- Confirm you have selected the correct client, address & county
- Click on Forms at the top of the page
- Existing Uploads & Existing Forms: View uploaded contractor completion forms, DSTO’s, Blower Doors etc. relevant to the job, print forms as needed.
- Prior to performing interim and final audit print new work order and this will identify all items completed by contractor. You will also note any actual quantity differences identified by contractor. If you disagree with any identified contractor changes, please contact contractor to re-work prior to going on final audit.

### **Mark Auditor Inspection Boxes for Interim and Final Audits**

- Prior to performing interim and final audits print new work order and this will identify all items completed by contractor. Note any actual quantity differences identified by contractor. If you disagree with any identified contractor changes, please contact contractor to re-work prior to going on interim or final audit.
- At time of submitting interim or final audit, you will need to select “Work Order”.
- Check “Inspect” on all items completed by contractor.
- When finished you will select “Save W.O. & Return”.

### **Passing/Failing Interim and Final Audits**

- Auditors have the ability to pass or fail their interim and final audits.
- Status must be in “Auditor to perform interim audit” or “Auditor to perform final audit”
  - If you have a passed or failed an interim or final audit and the status is **not** “Auditor to perform interim or final audit”, you must call or email Kim Cunningham at 800-377-6334 ext 215 or [kim@builddindiana.org](mailto:kim@builddindiana.org) with the client # and name and request a status change.

### **Submitting Interim and Final Audits:**

- Review Job Sites
- Click on client number
- Go to the bottom of the screen and click on the drop down arrow, this will give you the ability to approve or reject the contractor work
  - If the interim/final was approved you would select “Approve contractor work” then click take action
  - If the interim/final was failed you would select “Reject contractor work” then click take action

Notes: If you have a failed final, please check the “Fail” box on the client completion sign off and list the specific details as to what items were failed and why. Do not have the client sign the failed completion sign off form, client only needs to sign this form when the final has passed.