

SEND Home Energy Conservation Program Client/Job Information

CLIENT INFORMATION

Client/Job Application ID: (excel import)

Client County: (excel import)

Client Full Name: (excel import)

Client First Name: (computer generate)

Client Last Name: (computer generate)

Client Middle Initial: (computer generate)

Client Address: (excel import)

Client City: (excel import)

Client State: (computer generate)

Client Zipcode: (excel import)

Client Phone Number: (excel import)

Client Application Date: (excel import)

Client Renewal Date: (computer generate)

Client Ownership: (excel import)

Client Status: (excel import)

Family Type:

CLIENT/JOB FILE

Client Downloaded into IBA System:

Client Application: Downloaded

Client 1st Letter Date Sent:

Client Renew Application Letter Date Sent:

Client Landlord Rental Agreement Client Letter Date Sent:

Client Renew Application/Rental Agreement Client Letter Date Sent:

Signed Rental Landlord Agreement Date Received:

Landlord Confirmation Call Date:

Client Call-in Date:

Client Submitted for Audit Date:

Client Assigned Auditor Date:

Auditor:

Auditor Number:

Heating Contractor:

Heating Contractor Number:

Plumbing Contractor:

Plumbing Contractor Number:

Shell Contractor:

Shell Contractor Number:

Health & Safety Inspection/Deferral Checklist Info Submitted Date:

Moisture Assessment Findings Info Submitted Date:

Deferral Recommended: Yes No

Deferral Approved: Yes No (If yes, generate invoice for deferral payment to auditor)

Deferral Approval Date:

Client Sent Deferral/Appeal Notification Letter Date:

Client Education Provided: Yes No

Client Education Provided by:

Signed Client Consent Form Submitted Date:

Dwelling Information and Building Specifications Form Info Submitted Date:

Electric Furnace Initial Audit Form Info Submitted Date:

Electric Furnace Heating Contractor Completion Form Info Submitted Date:

Electric Furnace Interim Audit Form Info Submitted Date:
 Heat Pump Initial Audit Form Info Submitted Date:
 Heat Pump Heating Contractor Completion Form Info Submitted Date:
 Heat Pump Interim Audit Form Info Submitted Date:
 Gas Appliance Initial Audit Form Info Submitted Date:
 Gas Appliance Heating Contractor Completion Form Info Submitted Date:
 Gas Appliance Interim Audit Form Info Submitted Date:
 Gas Cook Stove Initial Audit Form Info Submitted Date:
 Gas Cook Stove Contractor Completion Form Info Submitted Date:
 Gas Cook Stove Interim Audit Form Info Submitted Date:
 Water Heater Initial Audit Form Info Submitted Date:
 Water Heater Contractor Completion Form Info Submitted Date:
 Water Heater Interim Audit Form Info Submitted Date:
 Heating Load Calculation Sheet Info Submitted Date:
 New Furnace Installation Inspection Form Heating Contractor Info Submitted Date:
 New Furnace Installation Inspection Form Auditor Info Submitted Date:
 Blower Door Initial Audit Testing Results Info Submitted Date:
 Blower Door Interim Audit Testing Results Info Submitted Date:
 Blower Door Contractor Testing Results Info Submitted Date:
 Blower Door Final Audit Testing Results Info Submitted Date:
 Daily Safety Test Out Form Info – Initial Audit Submitted Date:
 Daily Safety Test Out Form Info – Interim Audit Submitted Date:
 Daily Safety Test Out Form Info – Final Audit Submitted Date:
 Daily Safety Test Out Form Info – Contractor Submitted Date:
 Daily Safety Test Out Form Info – Contractor Submitted Date:
 Daily Safety Test Out Form Info – Contractor Submitted Date:
 Auditor Work Order Info Submitted Date:
 Initial Audit Information Approved: Yes No (if yes, generate invoice for initial audit payment to auditor)
 Initial Audit Information Approved Date:
 SEND Work Order Revisions Made and Approved for Heating Contractor Date:
 Work Order Revisions Made and Approved for Plumbing Contractor Date:
 Work Order Revisions Made and Approved for Shell Contractor Date:
 Date SEND Approved Work Order Sent to Heating Contractor:
 Date SEND Approved Work Order Sent to Plumbing Contractor:
 Heating Contractor Completed Work Order Info Submitted Date:
 Heating Contractor Completion Information Approved: Yes No
 Heating Contractor Completion Information Approval Date:
 Plumbing Contractor Completed Work Order Info Submitted Date:
 Plumbing Contractor Completion Information Approved: Yes No
 Plumbing Contractor Completion Information Approval Date:
 Date Auditor Contacted for Interim Audit:
 Auditor Interim Audit Info Submitted Date:
 Interim Audit Information Approved: Yes No (if yes, generate invoice for initial audit payment to auditor)
 Interim Audit Information Approved Date:
 Heating Contractor Invoice Received Date:
 Heating Contractor Invoice Approved: Yes No (if yes, generate invoice for initial audit payment to auditor)
 Heating Contractor Invoice Approved Date:
 Plumbing Contractor Invoice Received Date:

Plumbing Contractor Invoice Approved: Yes No (if yes, generate invoice for initial audit payment to auditor)

Plumbing Contractor Invoice Approved Date:

SEND Approved Work Order Sent to Shell Contractor Date:

Shell Contractor Completed Work Order Info Submitted Date:

Shell Contractor Completion Information Approved: Yes No

Shell Contractor Completion Information Approval Date:

Auditor Contacted for Final Audit Date:

Final Inspection Client Sign-off Form Submitted Date:

Auditor Final Audit Info Submitted Date:

Final Audit Information Approved: Yes No (if yes, generate invoice for initial audit payment to auditor)

Final Audit Information Approved Date:

Client Completed Reported to IHCD A Date:

SEND Quality Control Inspection Date Pulled:

IHCD A Quality Control Inspection Date Pulled:

DOE Quality Control Inspection Date Pulled: