

### Clipboard Audit Template

\*\* For the Affordable Solar added incentive applications, installers are required to confirm that lighting and electric hot water efficiency measures have been implemented in the residence.

Audit Check Point	Yes	No	Quantity	N/A	Notes	Recommendations for Efficiency Improvement	Home Owner Initials
<b>Lighting</b>							
<i>**Efficient lighting (LEDs and CFLs) are usually the lowest cost way to save the customer energy. Efficient lighting must be installed in high use areas following the accompanying instructions.</i>							
Are CFLs or LEDs installed in the high use rooms? If not, record which fixtures need efficient lighting and in which rooms (determine high use rooms based on information from the customer).							
Are CFLs or LEDs installed in high-use exterior lighting? If not, record which fixtures need high efficiency lighting.							
<b>Water Heating</b>							
<i>**Low-flow faucet aerators are the lowest cost way to save the customer energy costs on hot water heating. This is especially important for solar electric customers if the home's water heater is electric.</i>							
What fuel source is used to heat water in the home?							
Record quantity of low-flow sink aerators and low-flow shower heads. Identify location(s) of each.							
Check for leaking faucets and note location.							
What type of hot water heater is used?							
Where is the water heater located?							
What is set point for the water heater?							
If the residence uses a tanked water heater, is it insulated?							
Are hot water pipes insulated (if located in an unconditioned space)?							
<i>If customer has a tanked electric hot water heater, a heat pump water heater may be more efficient and provide dehumidification benefits as well.</i>							
<b>Appliances</b>							
Record the number of refrigerators. Also identify the age of the refrigerator(s), if known. If the customer uses a secondary refrigerator, identify the location and determine how often it is plugged in.							
Record the number of stand-alone freezers and identify the age of the appliance, if known.							
Does the home have a clothes washer and dryer? Identify the age of the appliances, if known. Also identify frequency of use.							
Does the home have a dishwasher? If so, identify the age, if known.							
Does the home have a dehumidifier? If so, identify the age if known and frequency of use.							
Does the home have a hot tub or pool? If so, identify the frequency of use of the hot tub or pool pump. Does the pool have heated water or lighting?							
<i>Based on the condition and age of appliances, recommend replacement with ENERGY STAR, ENERGY STAR Most Efficient or CEE Tier 2 and 3 rated appliances. If the home has a hot tub or pool, recommend an ENERGY STAR rated pump, lower water temperatures, use of timers, use of a thermal cover to keep water warm, and regular maintenance of the pump (cleaning filter).</i>							
<b>HVAC</b>							
What is the primary heating fuel used?							
What type of heating system is used?							

What is the distribution system? (Hydronic, ducted/forced air, etc.)								
What type of thermostat does the home have? What is the set point in the summer and winter?								
Does the home use supplemental heating sources, such as space heaters? If so, how many and what type? Note the rooms where space heaters are used. How many hours or what times of day are they used?								
Does the home have central air conditioning? If so, what is the typical thermostat setting and what times of day is it used?								
Check the filter condition and recommend regular maintenance. Replace the filter if dirty.								
If applicable, check the duct work for leaks and adequate insulation.								
Does the home use window air conditioners? If so: How many? What is the typical temperature setting and what times of day/how many hours is it used? What location(s) in the home?								
<i>If the home has central air conditioning, recommend duct sealing, insulation, duct testing, and regular system maintenance (tune ups and filter replacement) to ensure optimal performance of the system. If the heating system is forced air, recommend an ECM motor and programmable thermostat.</i>								
<b>Building Envelope</b>								
Does the home have rooms that are either too warm in the summer or cold in the winter? If so, which rooms?								
Are there drafty areas in the home? If so, where?								
Are windows and doors kept closed during cooling and heating seasons?								
Is weather-stripping adequate around doors and windows?								
If the home has window air conditioners, examine the installation and check the adequacy of air sealing around the perimeter. Recommend that the homeowner improve the installation/air sealing if it is deficient.								
<i>- If the home has a central air conditioning system, recommend that a home performance professional check the adequacy of insulation in the attic and install additional insulation, if necessary.</i>								
<b>Plug Load</b>								
Record the number of plug load devices. (Television, cable boxes, gaming consoles, computers, phone chargers, etc.)								
Does the home use smart strips? If so, record the number and provide detail on location and components plugged into it.								
<i>Recommend that the customer turn off or unplug appliances when not in use. Recommend ENERGY STAR rated units, especially for cable boxes. Recommend the use of a smart strip, in applicable scenarios (televisions with gaming consoles and stereo components, or esktop computers with peripherals) to control vampire load.</i>								