TRADE ALLY SOLUTIONS ASSESSMENT DATA

BUILDING PERFORMANCE INSTITUTE (BPI) ASSESSOR: _____ ASSESSMENT DATE: _____

1 General Information

Trade Ally Contractor:		Trade Ally Phone:		Trade Ally Email:	
BPI Certified Assessor Name / Company:		Assessor Phone:		Assessor Email:	
Homeowner Name:	Homeowner Phone:	Homeowner Email:			
Billing Address:		City:	State:	ZIP Code:	Renter or Owner?
County:		City:	State: **WI**	ZIP Code (WI):	

NOTES:

2 Building Information

Type of Home: ☐ Single Family ☐ Condo ☐ Attached	Year Built:	Orientation:	House Length:	House Width:	Floors Above Grade:	Wall Height:
A Inc. Basement?	Conditioned Area	# Occupants:	# Bedrooms:	# Units:	Shielding: ☐ Well ☐ Exposed ☐ Normal	Cantilevers (sq. ft./R-Value):
Electric Utility Provider:	Account #:		Gas Utility Provider:		Account #:	

NOTES:

Gas Leak Detector Present?	Carbon Monoxide (CO) Detector? Basement	Ground Floor	First Floor

3 Homeowner Concern (Reasons They Called)

NOTES:

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4 Heating & Cooling

System One: Heating Equipment Type:			**Upgrade Action:**		**Is Condensing:**
Furnace: ☐ with Central AC ☐ with Stand-Alone Ducts ☐ Boiler ☐ Central Heat Pump ☐ Electric Resistance ☐ Direct Heater			☐ Install New System ☐ Keep As Is ☐ Replace with Newer Model		☐ Yes ☐ No
Fuel Type: ☐ Natural Gas (NG) ☐ Elec ☐ Propane ☐ Fuel Oil	Load %:	Model Year:	Output Capacity in British Thermal Unit per Hour (BTU/h):	Manufacturer & Model #:	System Efficiency:
System One: Cooling Equipment Type: ☐ Central AC/Stand-Alone Ducts ☐ Room AC ☐ Evaporative Cooler ☐ Direct ☐ Indirect			**Upgrade Action:** ☐ Replace with Newer Model ☐ Keep As Is ☐ Install New System ☐ Remove Permanently		
Fuel Type: ☐ Electric ☐ Other:_____	Load %:	Model Year:	Output Capacity (BTU/h):	Manufacturer & Model #:	SEER:

Ducts:

Duct Location: ☐ Conditioned ☐ Unconditioned ☐ Basement ☐ Attic ☐ Crawlspace ☐ Other: _____

Duct Leakage: ☐ 30% ☐ 15% ☐ 6% ☐ 3% ☐ Measured Cubic Feet per Minute (CFM): _____

May submit only one level of improvement unless a duct blaster is used to test results. (i.e., 30% to 15% okay, 30% to 6% not okay unless duct blasted.)

Duct Insulation: Duct Board Inches: _____ Fiberglass Inches: _____ Thermal/Bubble Wrap Inches: _____ Other: _____ R-Value: _____

All duct sealing must be completed with R8 insulation.

System Two: Heating Equipment Type:			**Upgrade Action:**		**Is Condensing:**
Furnace: ☐ with Central AC ☐ with Stand-Alone Ducts ☐ Boiler ☐ Central Heat Pump ☐ Electric Resistance ☐ Direct Heater			☐ Install New System ☐ Keep As Is ☐ Replace with Newer Model		☐ Yes ☐ No
Fuel Type: ☐ NG ☐ Elec ☐ Propane ☐ Fuel Oil	Load %:	Model Year:	Output Capacity (BTU/h):	Manufacturer & Model #:	System Efficiency:
System Two: Cooling Equipment Type: ☐ Central AC/Stand-Alone Ducts ☐ Room AC ☐ Evaporative Cooler ☐ Direct ☐ Indirect			**Upgrade Action:** ☐ Replace with Newer Model ☐ Keep As Is ☐ Install New System ☐ Remove Permanently		
Fuel Type: ☐ Electric ☐ Other:_____	Load %:	Model Year:	Output Capacity (BTU/h):	Manufacturer & Model #:	SEER:

Ducts:

Duct Location: ☐ Conditioned ☐ Unconditioned ☐ Basement ☐ Attic ☐ Crawlspace ☐ Other: _____

Duct Leakage: ☐ 30% ☐ 15% ☐ 6% ☐ 3% ☐ Measured CFM25: _____

May submit only one level of improvement unless a duct blaster is used to test results. (i.e., 30% to 15% okay, 30% to 6% not okay unless duct blasted.)

Duct Insulation: Duct Board Inches: _____ Fiberglass Inches: _____ Thermal/Bubble Wrap Inches: _____ Other: _____ R-Value: _____

All duct sealing must be completed with R8 insulation.

NOTES:

5 Appliances/Refrigerators/Bulbs/Doors

Range Fuel Type: ☐ NG ☐ Elec ☐ Prop	Oven Fuel Type: ☐ NG ☐ Elec ☐ Prop	Dryer Fuel Type: ☐ NG ☐ Elec ☐ Prop	Clothes Washer Type: ☐ Front ☐ Top ☐ None	ENERGY STAR®? ☐ Yes ☐ No	Dishwasher: ☐ Yes ☐ No	ENERGY STAR? ☐ Yes ☐ No
Freezer Usage in Kilowatt-Hour per Year (kWh/Yr):	Manufacturer:		Model #:		Model Year:	ENERGY STAR? ☐ Yes ☐ No
Dishwasher Energy Factor:	Manufacturer:		Model #:		Model Year:	Improved? ☐ Yes ☐ No
Clothes Washer IMEF:	Manufacturer:		Model #:		Model Year:	Improved? ☐ Yes ☐ No
Refrigerator One Age: ☐ 0-14 ☐ 15-21 ☐ 22-24	Size: ☐ 13-15 ☐ 16-18 ☐ 19-21 ☐ 22+	ENERGY STAR? ☐ Yes ☐ No	Refrigerator Two Age: ☐ 0-14 ☐ 15-21 ☐ 22-24	Size: ☐ 13-15 ☐ 16-18 ☐ 19-21 ☐ 22+		ENERGY STAR? ☐ Yes ☐ No
Refrig Usage (kWh/yr):	Manufacturer:		Model #:		Model Year:	Improved? ☐ Yes ☐ No
Lighting Compact Fluorescent Lights (CFLs) or LEDs: ☐ 0% ☐ 1-25% ☐ 26-50% ☐ 51-75% ☐ 75-99% ☐ 100%			Total # Lightbulbs: CFL _____ LED _____ Incandescent _____ Total: _____			
Door One Type: ☐ Steel ☐ Wood ☐ Fiberglass ☐ Hollow ☐ Storm ☐ Insulated			Door Two Type: ☐ Steel ☐ Wood ☐ Fiberglass ☐ Hollow ☐ Storm ☐ Insulated			

Notes:

6 Walls

Shared (Multifamily Only): Includes attic spaces over multiple condos/apartments.	☐ Shared Basement ☐ Shared Attic	Front Wall %:	Back Wall %:		Right Wall %:	Left Wall %:
Wall One Insulated? ☐ Well ☐ Poorly ☐ No	Siding: ☐ Brick Veneer ☐ Metal/Vinyl ☐ Shingle ☐ Stone ☐ Stucco ☐ Wood/Fiber/Cement				Construction: ☐ Block ☐ Brick ☐ Frame ☐ Log	
Area One (sq. ft.):	R-Value: Cavity Continuous	Area Two (sq. ft.):	R-Value: Cavity Continuous	Area Three (sq. ft.):	R-Value: Cavity Continuous	Area Four (sq. ft.):	R-Value: Cavity Continuous
Wall Two Insulated? ☐ Well ☐ Poorly ☐ No	Siding: ☐ Brick Veneer ☐ Metal/Vinyl ☐ Shingle ☐ Stone ☐ Stucco ☐ Wood/Fiber/Cement				Construction: ☐ Block ☐ Brick ☐ Frame ☐ Log	
Area One (sq. ft.):	R-Value: Cavity Continuous	Area Two (sq. ft.):	R-Value: Cavity Continuous	Area Three (sq. ft.):	R-Value: Cavity Continuous	Area Four (sq. ft.):	R-Value: Cavity Continuous

Notes:

7 Attics/Vaults

Insulation Depth:	Insulation Type:	Area (sq. ft.):	R-Value:	Radiant Barrier: ☐ Yes ☐ No	Knee Wall: ☐ Yes ☐ No	Area (sq. ft.):	R-Value:	Roof:* ☐ Yes ☐ No *bright white
Insulation Depth:	Insulation Type:	Area (sq. ft.):	R-Value:	Radiant Barrier: ☐ Yes ☐ No	Knee Wall: ☐ Yes ☐ No	Area (sq. ft.):	R-Value:	Cool Roof:* ☐ Yes ☐ No *bright white

Vault Area:	Cavity Insulation R-Value:	Continuous Insulation R-Value:	Cool Roof:
Vault Area:	Cavity Insulation R-Value:	Continuous Insulation R-Value:	Cool Roof:

Exterior Exhaust Vents: ☐ Kitchen ☐ Dryer ☐ Bath ☐ Two	Roof Venting: ☐ Soffit ☐ Ridge ☐ Gable ☐ Pods ☐ Power	Attic Access: ☐ Scuttle ☐ Drop Down ☐ Wall Panel

Notes:

Attic %:

Vault %:

8 Foundation

Foundation Type: % Basement_____% Crawl_____% Slab_____	Ft. Above Grade	Basement Heating Model: ☐ Intentional ☐ Intentional with Continuous Circulation ☐ Incidental ☐ Desired ☐ Undesired		Basement Floor Area:
Basement Cooling Model: ☐ Intentional ☐ Intentional with Continuous Circulation ☐ Incidental - Desired ☐ None/Undesired Incidental	Wall Insulation:	Wall R-Value:	Perimeter Length:	Rim Joist Length:
Crawlspace: Wall Insulation:	Rim Joist Insulation:	Rim Joist (sq. ft.):	Floor: ☐ Slab ☐ Soil ☐ Gravel	

9 Windows

Window Type One: ☐ Single ☐ Single with Storm ☐ Double ☐ Triple ☐ Low-e	Window Frame Type One: ☐ Wood ☐ Vinyl ☐ Metal	Window Type Two: ☐ Single ☐ Single with Storm ☐ Double ☐ Triple ☐ Low-e	Window Frame Type Two: ☐ Wood ☐ Vinyl ☐ Metal	Skylight Area (sq. ft.):
Window Area Divided by Wall Area (Be Accurate):	North %	South %	East %	West %
Overhang Depth One:	North	South	East	West
Width of the Soffit/Eves/Roof Overhang	North	South	East	West

10 Air Leakage

Blower Door CFM@50 Pre-Test:	_____CFM	Blower Door CFM@50 Post Test:	_____CFM	Estimate homes with vermiculite/asbestos by asking your Regional Manager. DO NOT TEST.	
FANS Measured (CFM) Pre-Test:	Kitchen One: Operable Window?	Bath One: Operable Window?	Bath Two:	Bath Three:	Bath Four:
Measured (CFM) Post-Test:	Kitchen One: Operable Window?	Bath One: Operable Window?	Bath Two:	Bath Three:	Bath Four:

Notes:

11 Domestic Hot Water (DHW) Equipment

Primary Fuel: ☐ Nat. Gas ☐ Electricity ☐ Other		DHW Type: ☐ Atmospheric ☐ Power-Vented ☐ Indirect Tank ☐ Tankless		Age:	Location:	Temperature Settings: ☐ Low (120-130) ☐ Medium (130-140) ☐ High (140-150) ☐ Very High (150+)
Recovery Efficiency:			Must be .67 or higher to qualify for water heater rebate. Natural draft, natural gas units replaced with natural gas power-vented or on-demand units only.			
Swimming Pool: ☐ Yes ☐ No	Hot Tub? ☐ Yes ☐ No	Solar Array? ☐ Yes ☐ No	Size (kW):	Array Slope:	Orientation:	Module Year:

Notes:

12 Combustion Safety Testing

	Exterior Reading	Interior Reading
Highest Ambient Carbon Monoxide Observed:	_____ parts per million (ppm)	_____ ppm

Construction Appliance Zone (CAZ) Worst-Case Scenario
Not required for power-vented/on-demand water heaters with sealed combustion/condensing furnaces.

CAZ Location	☐ Basement ☐ Attic ☐ Garage ☐ Crawlspace ☐ Other_____

Combustion Safety Tests
(Fire smallest BTUh appliance first, then larger BTUh appliances, then combined)

Appliance	Warm Vent Spillage Pre-Test (Two Min)		Warm Vent Spillage Post-Test (Two Min)		Steady-State Air Free CO Pre-Test	Steady-State Air Free CO Post-Test	CAZ CO Pre-Test	CAZ CO Post-Test
	Pass	Fail	Pass	Fail				
DHW:								
	Cold Vent Spillage Pre-Test (Five Min)		**Cold Vent Spillage Post-Test (Five Min)**					
Heating System One:								
Heating System Two:								
Spillage Time (Seconds):					Oven CO (As Measured, 225 ppm Limit):			

_____Power-Vented/On-Demand Water Heater Present _____Sealed Combustion/Condensing Furnace Present

Commonly Vented Appliances
If any of the appliances fail spillage under worst-case conditions, re-test under natural conditions, and record the results below. Also re-test draft and CO.

CO detectors? (Required by the State): ☐ Yes ☐ No	☐ Ground Floor ☐ Upper Floor ☐ Lower Floor

Notes:

Any safety failures must be presented to the homeowners using a signed Combustion Safety Form.

SNUGG PRO DATA COLLECTION FORM REFERENCE MATERIAL

Combustion Safety
Carbon Monoxide & Spillage Reference
Action Levels (BPI-1200-S-201x Standard Practice for Basic Analysis of Buildings)

Annex D | Action Levels for Spillage and Carbon Monoxide in Combustion Appliances (Normative)

D.1 Spillage assessment and CO measurement results shall be based on the following criteria:

- CO measured at five minutes of main burner operation.
- Spillage assessed at two minutes of main burner operation for warm vent.
- Spillage assessed at five minutes of main burner operation for cold vent.
- CO level at or below threshold in Section 7.9.5, Table One for the appliance being tested is ACCEPTABLE.
- CO level exceeding threshold in Section 7.9.5, Table One for the appliance being tested is UNACCEPTABLE.

Table 7.9.5.1 Air Free CO Thresholds for Fossil-Fuel Fired Combustion Appliances

Appliance	Threshold Limit
Central Furnace (All Categories)	400 ppm air free
Boiler	400 ppm air free
Floor Furnace	400 ppm air free
Gravity Furnace	400 ppm air free
Wall Furnace (BIV)	200 ppm air free
Wall Furnace (Direct Vent)	400 ppm air free
Vented Room Heater	200 ppm air free
Unvented Room Heater	200 ppm air free
Water Heater	200 ppm air free
Oven/Broiler	225 ppm as measured
Clothes Dryer	400 ppm air free
Refrigerator	25 ppm as measured
Gas Log (Gas Fireplace)	25 ppm as measured in vent
Gas Log (Installed in Wood-Burning Fireplace)	400 ppm air free in firebox

Did you:

- Completely fill out the Whole Home Application (for assessments and installations submissions).
- Turn on the required pages in Snugg Pro.
- Fill out the HES and Certificate of Completion and turn them in.
- Send an email to Home Performance at homeperformance@focusonenergy.com to let them know the job is submitted.
- Contact Snugg Pro to assist with alerts.

CAZ Worst-Case Depressurization Worksheet (Optional)

Table D.1.A ACTION LEVELS FOR SPILLAGE IN COMBUSTION APPLIANCES

The following actions shall be taken when spillage occurs under the specific circumstances detailed below.

TEST RESULT	ACTION REQUIRED
Greatest CAZ depressurization occurs with the air handler on*	Conduct further analysis of the distribution system to determine if leaky ducts or other HVAC-induced imbalances are the cause of the spillage. If so, recommend distribution system repairs that will reduce or eliminate the CAZ depressurization.
Greatest CAZ depressurization occurs with door to CAZ closed, but is alleviated when door to CAZ is open*	Recommend measures to improve air transfer between the CAZ and the core of the house.
The cause of spillage has been traced to excessive exhaust** independent of CAZ door position, air handler, or a problem with the flue†	Verify that sufficient combustion air is available per American National Standards Institute Z223.1/National Fire Protection Association (NFPA) 54 for gas-fired appliances and NFPA 31 for oil-fired appliances or recommend verification by a qualified professional. AND/OR Recommend further evaluation/service by a qualified professional to address the venting/combustion air issues.

*In the case where both spillage and excessive CO are present, in addition to the specific actions required above, recommend that the appliance be shut down until it can be serviced by a qualified professional.

**Refers to exhaust caused by mechanical ventilation and/or other means of exfiltration.

†When a recommendation to replace atmospherically vented combustion equipment inside the pressure boundary is made, and when cost-effective, recommend replacement with direct-vented, or power-vented equipment (or non-combustion equipment, such as a heat pump), which is ENERGY STAR labeled.

Ranges and Ovens (Continually Monitor Ambient CO Levels During Test)

1	Remove any items/foil in or on oven/range top.
2	Turn to bake at 500°F. Make sure self-cleaning features are not activated.
3	Test oven in throat of oven exhaust before dilution of air.
4	Unacceptable CO level: Advise the homeowner/occupant that the appliance should be serviced immediately by a qualified professional.
	Acceptable CO level: No action required.

Acceptable Appliance Spillage Periods

Water Heater, Gravity Furnace, Boiler Always test water heaters as warm.	5.0	2.0
Space Heater	5.0	2.0
Forced Air Furnace	5.0	2.0

Ambient CO Action Levels:
70 ppm or greater: Terminate the inspection and notify all building occupants to evacuate the building. Notify emergency services.
36 ppm–69 ppm: Advise homeowner that elevated levels were detected, open windows and doors, and turn off CO source immediately.
9 ppm–35 ppm: Advise homeowner that CO has been detected and recommend all CO sources be checked and windows/doors opened.

Rebates are subject to change and cannot exceed project costs.

REDUCING ENERGY WASTE ACROSS WISCONSIN
FOCUS ON ENERGY®, Wisconsin utilities' statewide program for energy efficiency and renewable energy, helps eligible residents and businesses save energy and money while protecting the environment. Focus on Energy information, resources, and financial incentives help to implement energy efficiency and renewable energy projects that otherwise would not be completed.

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