

# Audit Template Quick Start Guide

50121 HOMES Template




# Overview

Audit Template is a web-based tool designed to collect, store, and report building energy audit data for compliance with energy efficiency programs, including energy audit ordinances. It enables energy efficiency program managers, as well as state and local governments, to create custom reporting templates that support compliance requirements. Users can enter data into the Audit Template to fulfill program reporting requirements and submit the audit report that compiles all entered data for submission to the relevant program or jurisdiction. The audit data is available to download in PDF, CSV, or BuildingSyncXML<sup>1</sup> file formats.

## How to Access and Input Data

To access the Audit Template, visit <https://buildingenergyscore.energy.gov>, create an account, and log in. To create and submit a building audit data report in Audit Template, the user should follow the seven steps outlined in this guide.

The data entry input fields available in the Audit Template follow the ANSI/ASHRAE/ACCA Standard 211-2018, Standard for Commercial Building Energy Audits. Additional data fields required by specific programs or jurisdictions are included where applicable. The icons below identify input categories on the data entry screens in the tool:


-  ASHRAE Standard 211 Level I or Level II inputs
-  Program or jurisdiction specific inputs
-  Fields required for program or jurisdiction reporting.

## Home Energy Rebate Program Reporting Template in Audit Template

The Home Energy Rebates program (HOMES) specifies a mandatory minimum set of reporting requirements. These mandatory requirements have been implemented in the Audit Template. For audit data reporting for the IRA HOMES program, select '**50121 HOMES Template**' from the '**Add Audit Report**' button drop down menu. This template will identify the mandatory reporting requirements for the HOMES program which corresponds to an ASHRAE Level II audit.

The tool verifies compliance with these requirements and alerts the user if any are not met. Once all mandatory requirements are satisfied, the audit report can be marked as complete. The auditor can then download the Audit Template report, including a BuildingSync file, for submission to the state or their program administrator. The submission process would be defined by the State the user is submitting the data to.

## Where to go for Help

To assist with data entry, each screen has a Help icon  that links to an associated module of an online Audit Template User Guide. The User Guide is connected to the Asset Score Help Desk, which may be used to submit a support ticket to request additional assistance.

- Audit Template User Guide:  
<https://help.buildingenergyscore.com/support/solutions/8000051362>

<sup>1</sup> The XML files follow the format of BuildingSync® XML developed by National Renewable Energy Laboratory. BuildingSync® is a standardized language for commercial building energy audit data that software developers may use to exchange data between audit tools. For information on BuildingSync, visit <https://buildingsync.net>.

# Audit Template Data Input Steps

Each of the data input steps mentioned below corresponds to a data entry screen accessible from the Audit Template toolbar:



- 1. Building Information**  
Select “**50121 HOMES Template**” from the drop-down menu and enter building name, year of construction, gross floor area, and location. Click the “**Create Building**” button to continue to the audit report data entry screens.
- 2. Contact Information and Audit Details**  
Complete sections that include audit details including audit completion dates, audit team and building staff contacts.
- 3. Facility Description**  
Complete sections related to information of the audited building, including building use types, building envelope characteristics and major installed equipment components such as HVAC, lighting, and service hot water systems.
- 4. Utility Data and Benchmarking**  
Specify energy supply sources and enter the monthly metered and delivered energy use data (or import through EnergyStar Portfolio Manager). An annual summary displaying average annual energy use and cost by energy supply source will be generated. Benchmarking data, including the building’s energy use intensity (EUI) and target energy savings may also be provided in this section.
- 5. Energy Use Breakdowns and QA/QC**  
Enter estimated building energy use by end use for all energy supply sources. Totals will be calculated and displayed in an ‘End Use Summary’ table. These will be used to verify that the estimated energy use by end use estimates align with annual energy use for each energy supply source.
- 6. Energy Savings Opportunity**  
Identify energy efficiency measures (EEMs) and group them into package of measures based on cost of implementation (i.e. low cost, no cost package of measures and potential capital EEMs). Provide energy and cost savings that have been manually calculated or generated by a third-party energy modelling software. Calculated net measure costs, ROI and payback years will be displayed.
- 7. Mark as Complete**  
Select the “Submit” button to mark data collection as complete and download the completed reports, along with the BuildingSync file. Users will also receive a confirmation email. The user is then required to follow the State’s guidelines for submitting the BuildingSync and/or Audit Template report.