Weatherization Assistant Version 8.4: Getting Started Guideline

Updated: November 25, 2008

This guideline outlines the initial steps you should follow after Version 8.4 of the Weatherization Assistant has been installed for the first time to set up your agency and configure the Setup and Supply Libraries. For new users of the Weatherization Assistant, this guideline also outlines how you can create a client and start an audit for that client. The document “Weatherization Assistant Version 8.4: Downloading and Installation Instructions” should be consulted for guidance on how to obtain and install the latest release of the Weatherization Assistant.

The first section of this guideline outlines a standard, manual method for setting up your agency and the Setup and Supply Libraries. If you previously used Version 8.2 or 8.3 of the Weatherization Assistant, the second section of this guideline describes an alternative setup method that imports all your agency information, selected clients and their audits (if desired), and Setup and Supply Library information from Version 8.2 or 8.3 into Version 8.4 (importing from Version 7.4 is not possible). This may be desired to reduce the time needed to reenter agency or Setup and Supply Library information compared to the manual method, and/or to maintain a contiguous set of clients and audits in your Version 8.4 database. You should decide on which setup method you want to use by carefully reading over the steps required before embarking on either approach. If you previously used Version 8.2 or 8.3 and are going to use the alternative setup method, do NOT implement any of the steps outlined in the standard setup method because agency or library names may be entered in Version 8.4 that are the same as in Version 8.2 or 8.3 which will cause confusion.

STANDARD SETUP METHOD

Enter the Installation ID

1. The first time you start the Weatherization Assistant after installation, you will be asked to enter an “Installation ID” (see Fig. 1). The entry requested is a brief name identifying this specific installation of the software. If this will likely be the only installation of the Weatherization Assistant in your agency, this entry is not vital and may be something such as the acronym of your agency (e.g., ORNL). However, if you plan to have multiple installations of the software on different computers within your agency, the Installation ID should *uniquely* identify this specific installation. For example, you might enter the last name or initials of the person who is responsible for this specific computer (e.g., MPT). If left blank, a default installation ID consisting of the time you installed the Weatherization Assistant will be assigned. After entering the Installation ID, select the “Done” button. You will see a “splash screen” identifying the program name, version number, release date, and brief credits to the organizations that developed NEAT and MHEA. This screen will automatically disappear in several seconds after the Weatherization Assistant is fully opened. You will then be presented with the Weatherization Assistant’s Main Menu (see Fig. 2). You can change the Installation ID at any time by selecting the “Preferences” button on the Weatherization Assistant’s Main Menu. See Chapters 3.3 and 11.1 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details on the Installation ID.

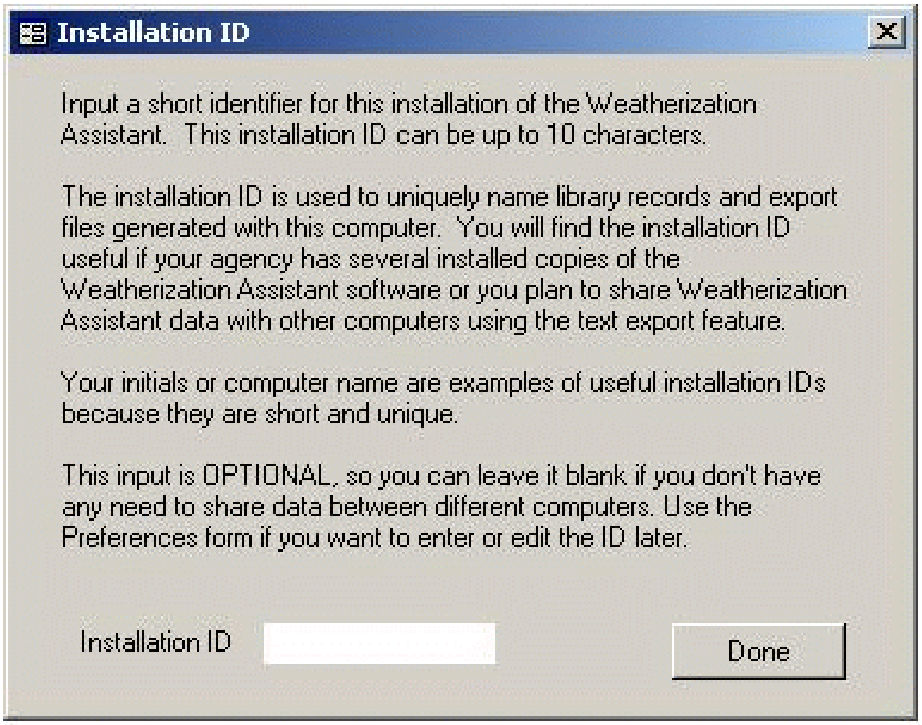

Figure 1. The Installation ID form.

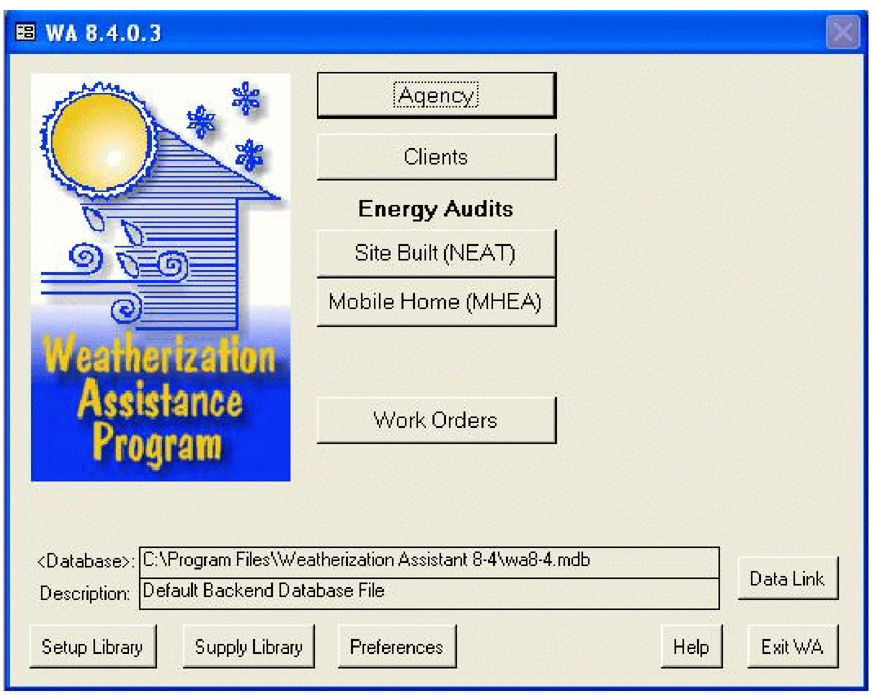

Figure 2. The Weatherization Assistant's Main Menu.

Initialize Your Agency Information

2. From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Agency" button to display the Agency Information form under the Agency Main Menu Item (see Fig. 3). Then do the following (see Chapter 5.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):
   A. If the name shown in the Agency Name field is not "Your Agency", use the combo box in the "Agency" record navigation block in the lower left corner of the Agency Information form to call up the agency with the name "Your Agency".
   B. Change the Agency Name from "Your Agency" to the actual name of your agency (the full name or perhaps an acronym). For example, Oak Ridge National Laboratory or ORNL. If there are multiple installations of the Weatherization Assistant on different computers within your agency, we recommend that you add a dash ("-") after the agency name you entered followed by the Installation ID you entered in Step 1 (e.g., ORNL - MPT).
   C. Change the State from "US" to your state using the combo box in the State field.
   D. Although not absolutely necessary, we recommend that you change the Agency Type from "Other" to the type that best describes your agency using the combo box in the Agency Type field and delete the "Agency comment" from the Comment field.
   E. Make sure the check box in front of "Default agency to associate with new Client, Work Order, ..." is checked.

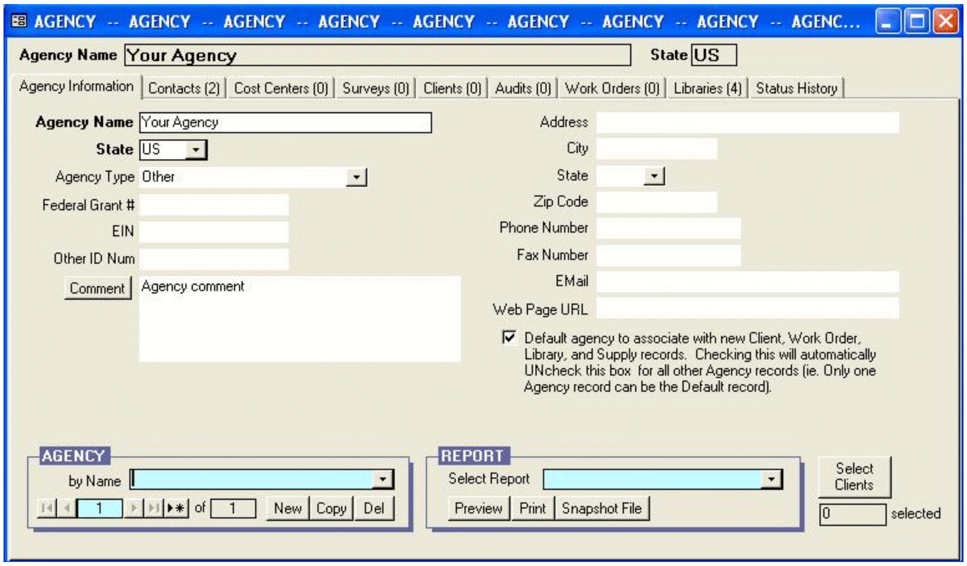

Figure 3. The Agency Information form under the Agency Main Menu Item.

3. While still under the Agency Main Menu Item, select the “Contacts” tab to display the Contacts form (see Fig. 4). Then do the following (see Chapter 5.2 of the “Weatherization Assistant Users Manual for Administrative Features” for more details):
   A. If the name shown in the Contact Name field is not “Admin, Your”, use one of the combo boxes in the “Agency Contact” record navigation block in the lower left corner of the Contacts form to call up a contact with the name of “Admin, Your” with User Name “YADM”.
   B. Change the Contact Name from “Admin, Your” to the actual name of a program administrator associated with your agency, change the User Name from “YADM” to a more appropriate selection (we recommend using the person’s initials or their first or last name), and make sure the Active check box is checked.
   C. A password of “Admin” (note the uppercase “A”) has already been assigned to the contact who replaced “Admin, Your” in Step 3B. If you want to use the Weatherization Assistant’s password feature to restrict who can open the software, you should change this password to a new one of your choice by selecting the “Change LogOn Group and Password” button, entering a new password, confirming the new password, confirming the old password of “Admin”, and then selecting the “Apply New Password” button (see Chapter 11.4 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details).
   D. Call up a contact with the name of “Auditor, Your” with User Name “YAUD” using one of the combo boxes in the “Agency Contact” record navigation block in the lower left corner of the Contacts form.
   E. Change the Contact Name from “Auditor, Your” to the actual name of an auditor in your agency, change the “YAUD” User Name, and make sure the Active and Auditor check boxes are checked. Also, change the password for this contact from “Auditor” to one of your choice if you want to use the password feature.

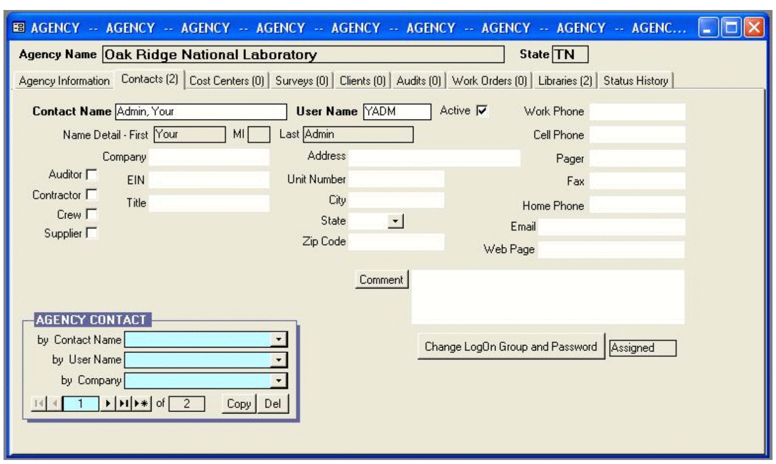

Figure 4. The Contacts form under the Agency Main Menu Item.

4. Exit the Agency Main Menu Item using the X-box in the upper right corner of the Agency Main Menu Item to return to the Weatherization Assistant’s Main Menu. The correct X-box is on the same row as “AGENCY -- AGENCY -- AGENCY” in Fig. 4.

Name Your Supply Library

5. From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Supply Library" button to display the General Information form under the Supply Library Main Menu Item (see Fig. 5). Then do the following (see Chapter 10.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):
   A. If the name shown in the Supply Name field is not "Your Supply Library [Installation ID]", where the [Installation ID] is the Installation ID you entered in Step 1 (or a "time stamp" if you did not enter an Installation ID), use the combo box in the "Supply" record navigation block in the lower left corner of the General Information form to call up "Your Supply Library [Installation ID]".
   B. Rename the Supply Name from "Your Supply Library [Installation ID]" to something more recognizable to you. We recommend that you enter the acronym of your agency in front of "Supply Library" (e.g., ORNL Supply Library). If you have more than one installation of the software within your agency, we recommend that you also retain the Installation ID in the name (e.g., ORNL Supply Library - MPT).
   C. Make sure the name of your agency (as named in Step 2) is listed in the Agency field. If not, use the combo box in the Agency field to select your agency.

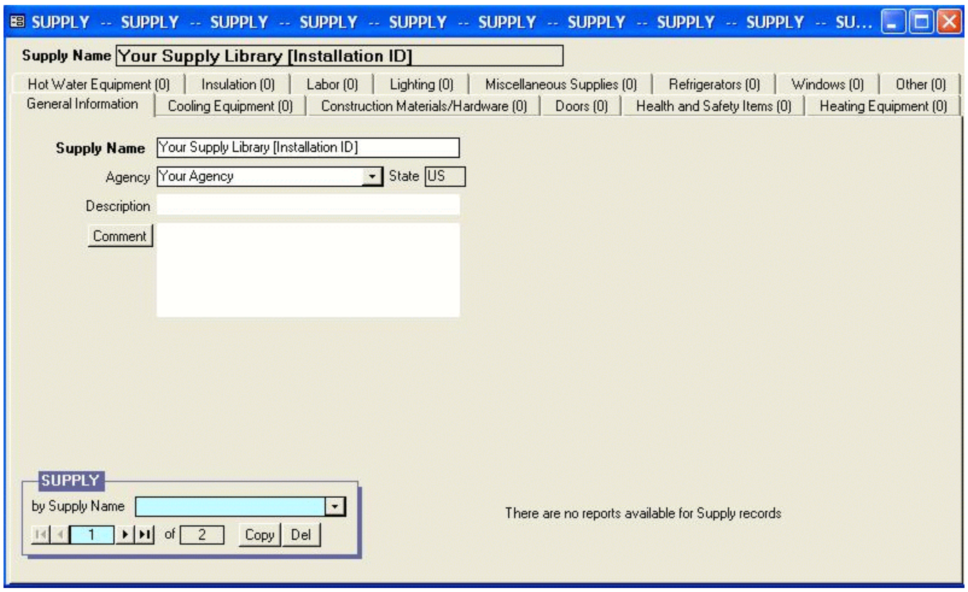

Figure 5. The General Information form under the Supply Library Main Menu Item.

6. Exit the Supply Library Main Menu Item using the X-box in the upper right corner of the Supply Library Main Menu Item (the X-box on the same row as "SUPPLY -- SUPPLY -- SUPPLY" as shown in Fig. 5) to return to the Weatherization Assistant's Main Menu.

Name Your Setup Library

7. From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Setup Library" button to display the Setup Library Information form under the Setup Library Main Menu Item (see Fig. 6). Then do the following (see Chapter 9.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):
   - A. If the name shown in the Library Name field is not "Your Setup Library [Installation ID], where the [Installation ID] is the Installation ID you entered in Step 1 (or a "time stamp" if you did not enter an Installation ID), use the combo box in the "Setup Library" record navigation block in the lower left corner of the Setup Library Information form to call up "Setup Library [Installation ID]".
   - B. Rename the Library Name from "Your Setup Library [Installation ID]" to something more recognizable to you. We recommend that you enter the acronym of your agency in front of "Setup Library" (e.g., ORNL Setup Library). If you have more than one installation of the software within your agency, we recommend that you also retain the Installation ID in the name (e.g., ORNL Setup Library - MPT).
   - C. Make sure the name of your agency (as named in Step 2) is listed in the Agency field. If not, use the combo box in the Agency field to select your agency.
   - D. Make sure the name of your supply library (as named in Step 5) is listed in the Supply Library field. If not, use the combo box in the Supply Library field to select your supply library.

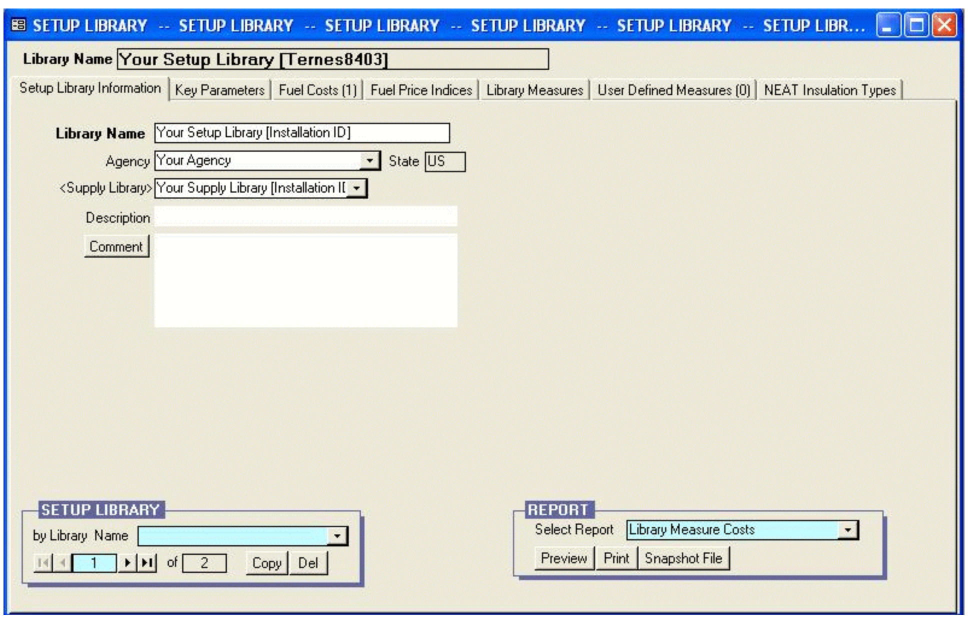

Figure 6. The Setup Library Information form under the Setup Library Main Menu Item.

8. Exit the Setup Library Main Menu Item using the X-box in the upper right corner of the Supply Library Main Menu Item (the X-box on the same row as "SETUP LIBRARY -- SETUP LIBRARY -- SETUP LIBRARY" as shown in Fig. 6) to return to the Weatherization Assistant's Main Menu.

Populate the Supply and Setup Libraries

Before entering a client and running an audit, data specific to your agency must be entered into the Setup Library such as your actual fuel costs, your actual costs for installing measures, and identifying which measures your agency can perform. Information needs to be entered into the Supply Library only if you replace refrigerators or water heaters, or if you will be using detailed material information in the optional work order feature.

If this is your first use of the Weatherization Assistant, it may take up to a week to compile the required information and then a day to enter it into the Weatherization Assistant. If you used a previous version of the Weatherization Assistant, it may take less than a day for you to manually reenter the data from the previous version into Version 8.4, although now might be a good time to take an extra day to update the information. If you were previously using Version 8.2.7.8 or 8.3 of the Weatherization Assistant, you can easily print out all the measure costs you had entered in the Setup Library by selecting the “Setup Library” button from the Weatherization Assistant’s Main Menu (see Fig. 2) to display the Setup Library Information form under the Setup Library Main Menu Item (see Fig.6), choosing the Library Measure Costs report using the combo box in the “Report” block in the lower right corner of the Setup Library Information form, and selecting the “Print” button in the “Report” block.

9. From the Weatherization Assistant’s Main Menu (see Fig. 2), select the “Setup Library” button to display the Setup Library Information form under the Setup Library Main Menu Item (see Fig. 6). Then do the following (see Chapter 9 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details):
    A. Ensure that the Library Name is the name of your setup library that you named and assigned to your agency in Step 7. If it isn’t, use the combo box in the “Setup Library” record navigation block in the lower left corner of the Setup Library Information form to call up your setup library.
    B. Use the tabs shown on the Setup Library Main Menu Item to enter data specific to your agency. The “Fuel Costs” tab (to enter current fuel costs) and the “Library Measures” tab (to select the measures your agency installs and enter the costs for these measures in the units specified) are of greatest importance. You may also look at the “Key Parameters” tab to see if any of these items need to be altered.
    C. Exit the Setup Library Main Menu Item using the X-box in the upper right corner of the Setup Library Main Menu Item (the X-box on the same row as “SETUP LIBRARY -- SETUP LIBRARY -- SETUP LIBRARY” as shown in Fig. 6) to return to the Weatherization Assistant’s Main Menu.

10. From the Weatherization Assistant’s Main Menu (see Fig. 2), select the “Supply Library” button to display the General Information form under the Supply Library Main Menu Item (see Fig. 5). Then do the following (see Chapter 10 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details):
    A. Ensure that the Supply Name is the name of your supply library that you named and assigned to your agency in Step 5. If it isn’t, use the combo box in the “Supply” record navigation block in the lower left corner of the General

Information form to call up your supply library.

B. If you plan on replacing refrigerators or water heaters, enter the replacement models you will use by selecting the “Refrigerator” or “Hot Water Equipment” tabs (see Chapter 10.3 of “The Weatherization Assistant User Manual for Administrative Features” for additional details).

C. If you plan on using the Weatherization Assistant’s optional work order feature, you may want to populate the supply library with common materials using the tabs shown on the Supply Library Main Menu Item (e.g., Insulation, Lighting).

D. Exit the Supply Library Main Menu Item using the X-box in the upper right corner of the Supply Library Main Menu Item (the X-box on the same row as “SUPPLY -- SUPPLY -- SUPPLY” as shown in Fig. 5) to return to the Weatherization Assistant’s Main Menu.

ALTERNATIVE SETUP METHOD FOR PREVIOUS USERS OF VERSION 8.2 OR 8.3

If you used Version 8.2 or 8.3 of the Weatherization Assistant, you can use this alternative setup method to import all your agency information, selected clients and their audits (if desired), and initial Setup and Supply Library information from Version 8.2 or 8.3 into Version 8.4.

11. Before starting Version 8.4 for the first time, start Version 8.2 or 8.3 to display the Weatherization Assistant’s Main Menu (see Fig. 2) and then select the “Data Link” button to display the Data Link form (see Fig. 7). Write down the path name of the database you are using (it will end with a “.mdb”) as shown in the Path field under “Currently Linked BACKEND DATA File” (you can click into this field and use the keyboard navigation buttons to see the entire path name if needed). Alternatively, you can use traditional Windows procedures (e.g., press the Ctrl-C key combination) after highlighting the entire path name to copy the name into your computer’s memory for pasting later. Exit Version 8.2 or 8.3 of the Weatherization Assistant when you are done.

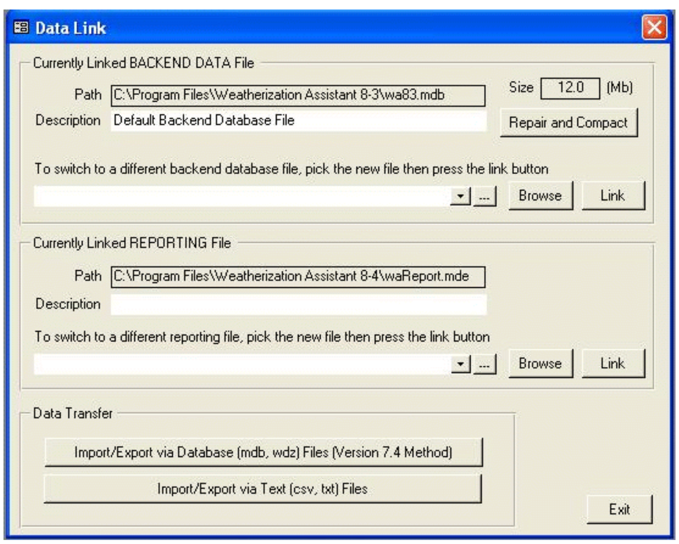

Figure 7. The Data Link form.

12. Start Version 8.4, and follow the same directions under Step 1 to enter the installation ID.

13. From the Weatherization Assistant's Main Menu (see Fig. 2), do the following:
   A. Select the "Data Link" button to display the Data Link form (see Fig. 7).
   B. Select the "Import/Export via Database (mdb, wdz) Files (Version 7.4 Method)" button to display a blank "Transfer Between Databases" form (see Fig. 8).

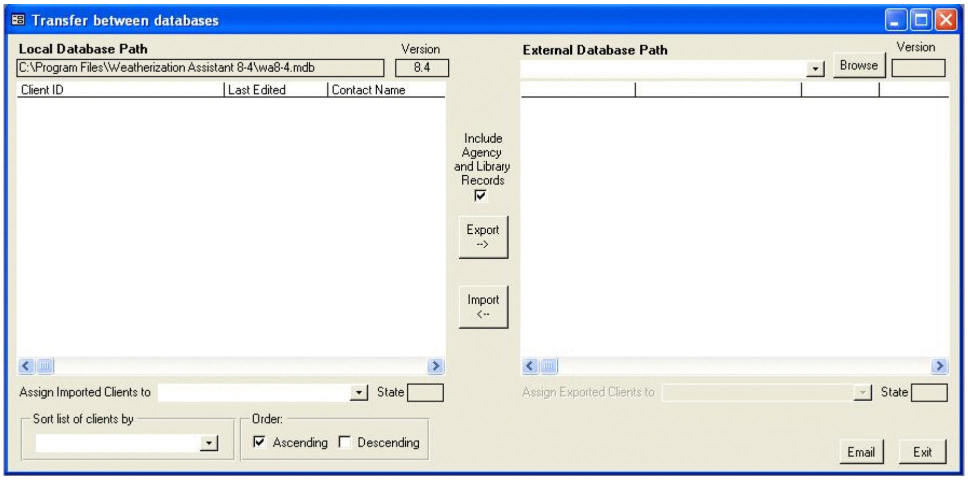

Figure 8. A blank Transfer Between Databases form.

   C. If you had copied the path name of your existing database into your computer's memory in Step 11, then click into the field beneath External Database Path, paste the path name into the field by pressing the Ctrl-V key combination, press the Enter key on your keyboard to display the clients in this data base (see Fig. 10), and proceed to Step 13F. Otherwise, select the "Browse" button to display the "Pick External Database for Import/Export" form (see Fig. 9).

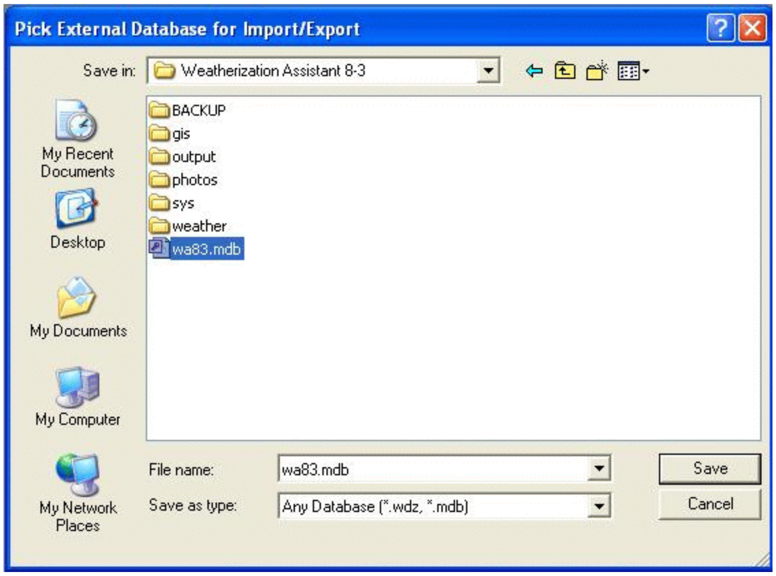

Figure 9. The Pick External Database for Import/Export form.

D. Use the combo box in the Save In field and the main display to find the database that you were using in Version 8.2 or 8.3 (refer to the path name you wrote down in Step 11). Click on the name of the database so that it is highlighted and its name appears in the File Name field, and then select the "Save" button.

E. You are brought back to the "Transfer Between Databases" form (see Fig. 10), where the path name for the database you were using in Version 8.2 or 8.3 is displayed next to the "Browse" button and the clients entered in this database are shown in the display window under "External Database Path."

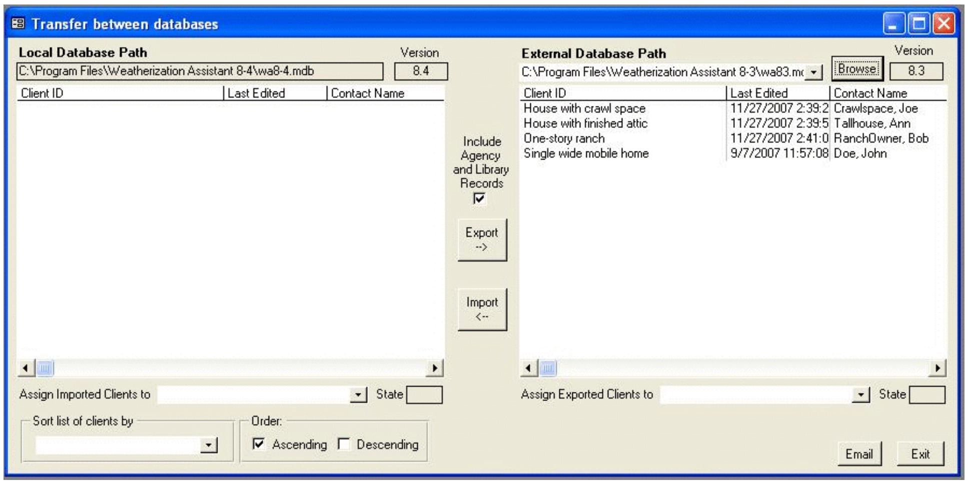

Figure 10. The Transfer Between Databases form with entries.

F. If you want to transfer one or more clients from Version 8.2 or 8.3 to Version 8.4 to create a contiguous Version 8.4 database, highlight the clients to be transferred by clicking on their Client IDs (more than one client can be highlighted by holding down the Ctrl or Alt keys). If not, select just one of your clients so that Agency and Setup and Supply Library information can be transferred (this client will be deleted from Version 8.4 in Step 15 once the transfer has occurred).

G. Once the clients have been highlighted, make sure that the "Include Agency and Library Records" check box is checked and then select the "Import <--" button to start the data transfer process, which may take several minutes depending on how many clients you highlighted. When the data transfer process is completed, the hour glass will not be displayed and the clients that you transferred will be listed on the left side of the form under "Local Database Path."

H. Select the "Exit" button to close the "Transfer Between Databases" form and return you to the "Data Link" form, and select the "Exit" button again to close the "Data Link" form and return you to the Weatherization Assistant's Main Menu.

14. From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Agency" button to display the Agency Information form under the Agency Main Menu Item (see Fig. 3). Then do the following:

A. If the name shown in the Agency Name field is not the name of the agency that you used in Version 8.2 or 8.3, use the combo box in the "Agency" record navigation block in the lower left corner of the Agency Information form to call up the agency with the name that you were using.

B. Make sure the check box in front of "Default agency to associate with new Client, Work Order, ..." is checked.

C. Verify that the number in parentheses on the "Clients" tab is the number of clients that you wanted to transfer from Version 8.2 or 8.3.

D. Exit the Agency Main Menu Item using the X-box in the upper right corner of the Agency Main Menu Item to return to the Weatherization Assistant's Main Menu. The correct X-box is on the same row as "AGENCY -- AGENCY -- AGENCY" as shown in Fig. 3.

15. If you transferred only one client so that the agency and Setup and Supply Library information could be transferred from Version 8.2 or 8.3 to Version 8.4 (see Step 13F), you should delete this client from the Version 8.4 database. Do this by:
    A. From the Weatherization Assistant's Main Menu, select the "Clients" button to display the Client Information form under the Client Main Menu Item (Fig. 11).
    B. If the name shown in the Client ID field is not the client to be deleted, use one of the combo boxes in the "Client" record navigation block in the lower left corner of the Client Information form to call up the client to be deleted.
    C. In the "Client" record navigation block in the lower left corner of the Client Information form, select the "Del" button and select "OK" when the warning box appears that says "This will cause CASCADING DELETES to occur in all tables associated with this Client record."
    D. Exit the Client Main Menu Item using the X-box in the upper right corner of the Client Main Menu Item (the X-box on the same row as "CLIENT -- CLIENT -- CLIENT" as shown in Fig. 11) to return to the Weatherization Assistant's Main Menu.

Even though this alternative setup method imports your Version 8.2 or 8.3 Setup Library into Version 8.4, now might be a good time to update the information in the Setup Library, especially the installation costs that can be found under the "Library Measures" tab and the fuel costs that can be found under the "Fuel Costs" tab.

An upgrade from Version 8.2 or 8.3 to Version 8.4 signifies a change in the database structure. If, in Version 8.2 or 8.3, you had entered your own "User Defined Insulation Types" in the Setup Library for NEAT, the alternative setup method will not be able to transfer these insulation types and their associated costs into Version 8.4 because the formats are different. Therefore, you should enter these insulation types manually into Version 8.4 by selecting the "Setup Library" button from the Weatherization Assistant's Main Menu (see Fig. 2) and then selecting the "NEAT Insulation Types" tab, and then enter the costs associated with these insulation types by selecting the "Library Measures" tab. If you transferred one or more clients from Version 8.2 or 8.3 to Version 8.4 to form a contiguous Version 8.4 database, you must check all the audit-related forms in Version 8.4 before rerunning these audits to make sure all the fields are filled in. Refer to the "Weatherization Assistant Update History" document to help identify these fields.

CREATE A CLIENT AND AUDIT

Before entering audit data for a client's home, you must first set up the client in the Weatherization Assistant and enter information related to the client.

16. From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Clients" button to display the Client Information form under the Client Main Menu Item (see Fig. 11). ***Do not be alarmed that a previously defined client is displayed. Do not type over any information for an existing client.*** Do the following (see Chapter 6.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):
    - A. Initiate a new client by clicking on the "New" button in the "Client" record navigation block in the lower left corner of the Client Information form. This will automatically present you with a blank client form assigned to your agency.
    - B. Change the Client ID from the default ID the Weatherization Assistant created for this new client (e.g., "Client (xx)") to an ID your agency uses for the new client, normally a job number (e.g., ORNL 2007-001).
    - C. Make sure the name of your agency (as named in Step 2) is listed in the Agency field. If not, use the combo box in the Agency field to select your agency.
    - D. Assign the Setup Library that you named in Step 7 to this client using the combo box in the Setup Library field.
    - E. Select the correct Dwelling Type for the client using the combo box in the Dwelling Type field.
    - F. Although not absolutely necessary, we recommend that you enter the number of occupants in this house in the Number of Occupants field because NEAT and MHEA will use this value instead of a default value in their calculations.
    - G. Enter any other information you desire for your new client in the other fields on this form.

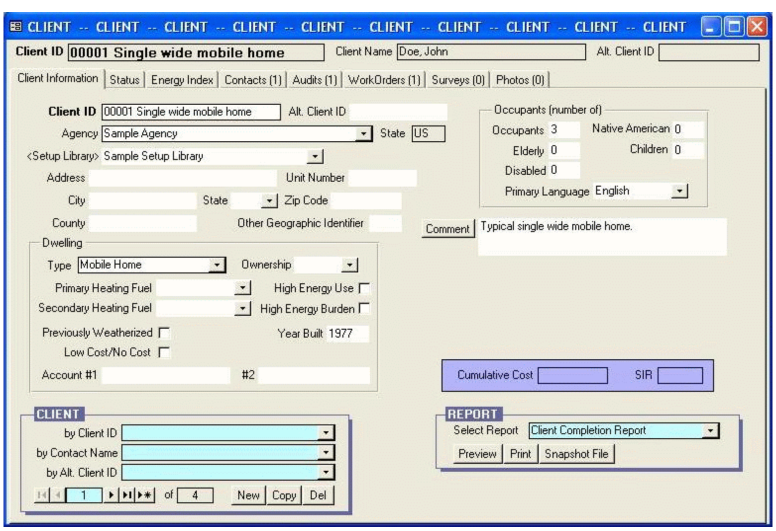

Figure 11. The Client Information form under the Client Main Menu Item.

17. While still under the Client Main Menu Item, select the "Contacts" tab to display the Contacts form (see Fig. 12). Then do the following (see Chapter 6.4 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):
    A. Enter the client's name in the Full Name field.
    B. Check the "Primary Applicant" check box.
    C. Ensure that the Contact Type is "Applicant/Person of Record". If not, use the combo box in the Contact Type field to select "Applicant/Person of Record."
    D. Enter any other information you desire for the client using the fields on this form. If you had entered address information for the client on the Client Information form in Step 16G, and if this address is the same address for this contact, then you can use the "Copy Client Addr" button to copy this address to the Contacts form.

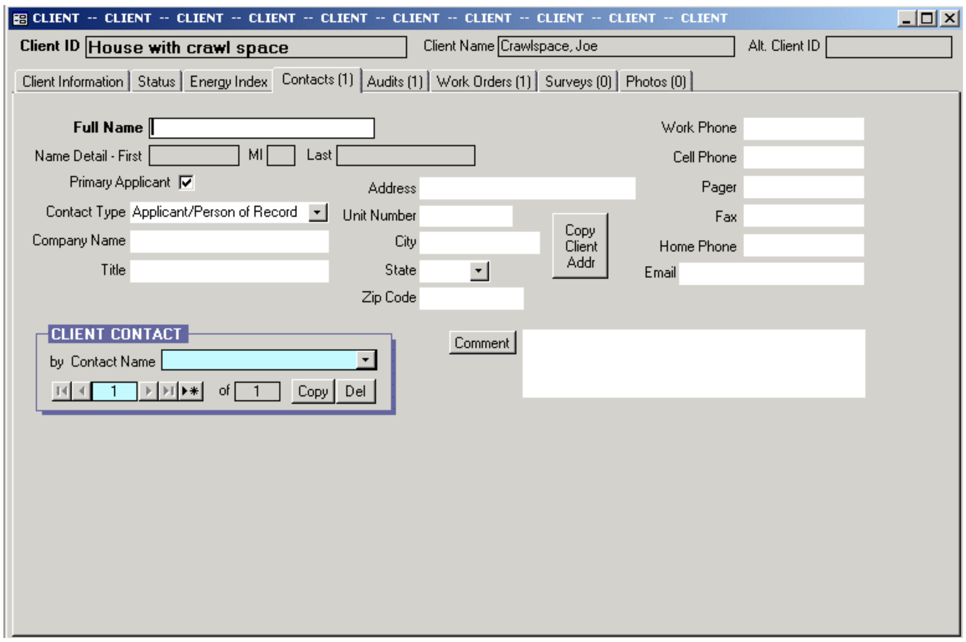

Figure 12. The Contacts form under the Client Main Menu Item.

Now that you have set up the client in the Weatherization Assistant, you are ready to describe the client's home in either of the audit programs (NEAT or MHEA), which will allow you to run the audit to develop a set of recommended energy measures. You may start a new audit from the Client Main Menu Item by following Step 18, or by returning to the Weatherization Assistant's Main Menu and selecting either the "Site Built (NEAT)" or "Mobile Home (MHEA)" buttons as outlined in Step 19. The advantage of following Step 18 and starting the audit from the Client Main Menu Item is that the Client ID is entered automatically, which eliminates a common error.

18. While still under the Client Main Menu Item, select the “Audits” tab to display the Audits form (see Fig. 13), and then select either the “Create New Site Built (NEAT) Audit” or “Create New Mobile Home (MHEA) Audit” button depending on which audit is applicable for the client’s house. This brings you to the Audit Information form under the NEAT or MHEA Main Menu Item (see Fig. 14). The Client ID field will already be filled in, as will the Agency Name and Agency State fields using information entered for the selected client in Step 16. Then do the following (see Chapter 7.1 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details):

    A. Change the Audit Name from the default name NEAT or MHEA created for this new audit (e.g., “Audit (xx)”) to a name conforming to the naming convention for clients and audits which you have developed. The new name may include some reference to the Client ID or client name, if you wish. For example, for a client named “Joe Crawlspace” with a Client ID of “ORNL 2007-001", you might enter “Crawlspace Audit 1" or “ORNL 2007-001 Audit 1" as the Audit Name to signify that this is the first (and probably only) audit you are creating for this client.
    B. Although not required, you may select the auditor to be assigned to this audit using the combo box in the Assigned To field. One such auditor was entered in Step 3.
    C. Select the Setup, Fuel Cost, and Supply Libraries to be assigned to this audit using the combo boxes in the Setup Library, Fuel Cost Library, and Supply Library fields, respectively. The Supply and Setup Libraries will be those that you named in Steps 5 and 7, respectively, and populated with updated information in Steps 9 and 10. The Fuel Cost Library is a sub-library found in the Setup Library. You should have updated this Fuel Cost Library and possibly created a second one as part of the process of updating and populating the Setup Library in Step 9. If you have not created more than one Setup, Fuel Cost, or Supply Libraries for your agency, then these entries will automatically be selected for you.
    D. Select a city close to the client that has similar weather to the client using the combo box in the Weather File field.
    E. Enter audit data on the house in the remaining fields on the Audit Information form.
    F. You may exit the NEAT or MHEA Main Menu Item (see Step 18H) and return later to enter remaining house audit data under other tabs on the NEAT or MHEA Main Menu Item (e.g., Shell, Heating, Cooling, Ducts/Infiltration, Baseloads, and Itemized Costs), or you can enter all house data now.
    G. When you are finished entering the audit data, you can run the audit by selecting the “Run Audit” button found in the upper right corner of each form under the NEAT or MHEA Main Menu Item. If you run the audit, a “Recommended Measures” report will be displayed. Exit this report using the “Close” button in the menu bar located at the top of the report.
    H. Exit the NEAT or MHEA Main Menu Item using the X-box in the upper right corner of the NEAT or MHEA Main Menu Item (the X-box on the same row as “NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT” as shown in Fig. 14 or equivalently for MHEA) to return to the Weatherization Assistant’s Main Menu.

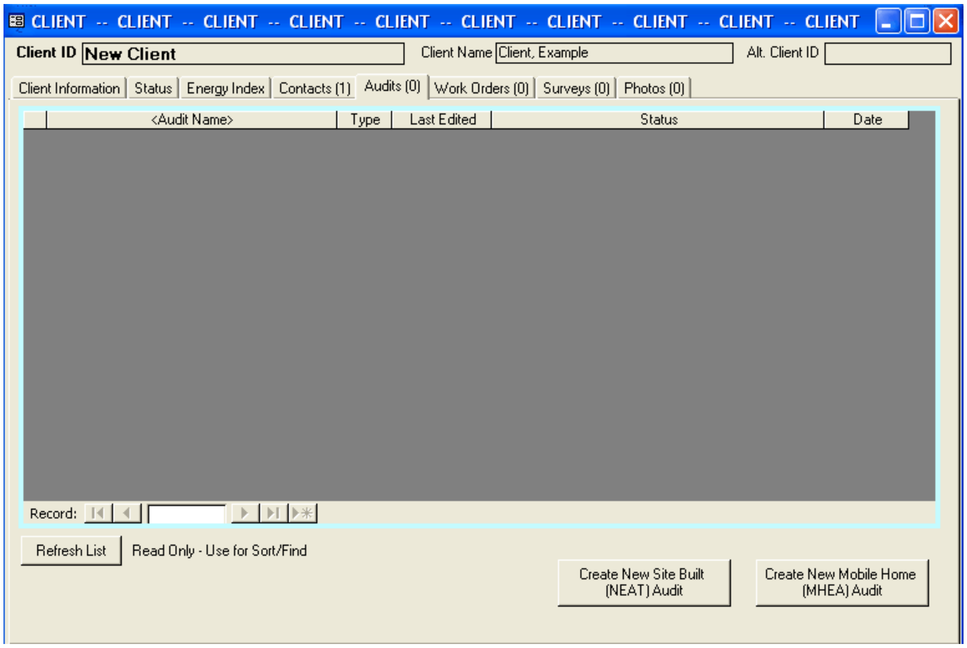

Figure 13. The Audits form under the Client Main Menu Item.

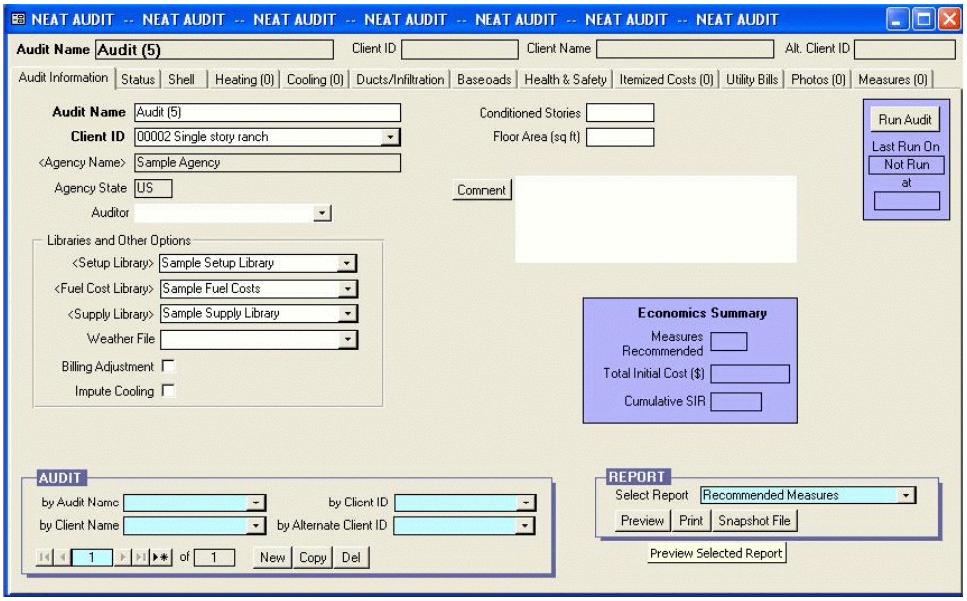

Figure 14. The Audit Information form under the NEAT Main Menu Item.

19. Picking up from the end of Step 17, do the following (see Chapter 7.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):

   A. Exit the Client Main Menu Item using the X-box in the upper right corner of the Client Main Menu Item (the X-box on the same row as "CLIENT -- CLIENT -- CLIENT" as shown in Fig. 12) to return to the Weatherization Assistant's Main Menu.

   B. Select either the "Site Built (NEAT)" or "Mobile Home (MHEA)" buttons on the Weatherization Assistant's Main Menu (see Fig. 2), depending on which audit is applicable for the client's house, to display the Audit Information form under the NEAT or MHEA Main Menu Item (see Fig. 14). ***Do not be alarmed that a previously entered audit is displayed. Do not type over any information for an existing audit.***

   C. Initiate a new audit by clicking on the "New" button in the "Audit" record navigation block in the lower left corner of the Audit Information form. This will automatically present you with a blank audit form.

   D. Select the client for this audit using the combo box in the Client ID field. The client information must have been previously entered as outlined in Steps 16 and 17. Select "OK" if a warning box appears that says "This will assign the Audit to a new Client record." The Agency Name and Agency State fields will be automatically filled in using information entered for the selected client in Step 16.

   C. Continue with Steps 18A-H.