



## Audit Worksheet

### Client Description

Client Name: \_\_\_\_\_  
Corporate Address : \_\_\_\_\_  
Number of Locations : \_\_\_\_\_  
Utility Company (s) : \_\_\_\_\_  
Electric Utility Rate (\$/kwh average) : \_\_\_\_\_  
Natural Gas Rate (\$/therm average) : \_\_\_\_\_  
Number of Locations : \_\_\_\_\_  
Location of Store (s) : \_\_\_\_\_  
States / Regions : \_\_\_\_\_

HVAC Service : \_\_\_\_\_ In House \_\_\_\_\_ or Outsourced \_\_\_\_\_  
If Outsourced Contractor Name : \_\_\_\_\_  
Desire Self Monitor / Control or Outsourced : \_\_\_\_\_  
Desire HVAC and Lighting Contractor Management : \_\_\_\_\_  
Desire Energy Usage Index Performance Indicator : \_\_\_\_\_

### Individual Facility Information

Building Name: \_\_\_\_\_  
Location: \_\_\_\_\_  
Is there a Static IP Address Available at the Store Location: Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, can it be used for EMS system remote monitoring: \_\_\_\_\_

**Individual HVAC Units if Available (If units are the same size indicate quantity)**

**Unit Number 1 Designation:** \_\_\_\_\_  
 Location of Existing Thermostat \_\_\_\_\_  
 Manufacturer: \_\_\_\_\_  
 Model: \_\_\_\_\_  
 Rated Cooling Tons: \_\_\_\_\_  
 Rated Heating BTU's: \_\_\_\_\_  
 System Type: Gas/Electric \_\_\_\_\_ Heat Pump \_\_\_\_\_  
                   Packaged \_\_\_\_\_ Split \_\_\_\_\_  
 Economizer Installed: Yes \_\_\_\_\_ No \_\_\_\_\_  
 HVAC Unit Electric Service Voltage: \_\_\_\_\_ Phase: 1 \_\_\_\_\_ 3 \_\_\_\_\_  
 Number of Cooling Stages: \_\_\_\_\_ Number of Heating Stages: \_\_\_\_\_  
 Hours / Day for Cooling \_\_\_\_\_ Hours per Day for Heating \_\_\_\_\_  
 Days / Year for Cooling \_\_\_\_\_ Days per Year for Heating \_\_\_\_\_

**A/C Cool (HVAC Air Conditioning Performance)**

Compressor 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Compressor 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Indoor Fan	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**G/E Heat (HVAC Gas / Electric Heating Performance)**

Gas Fuel Input 1 <sup>st</sup> Stage	BTU	_____						
Gas Fuel Input 2 <sup>nd</sup> Stage	BTU	_____						
Heat Output 1 <sup>st</sup> Stage	BTU	_____						
Heat Output 2 <sup>nd</sup> Stage	BTU	_____						
Combustion Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Combustion Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**H/P Heat (HVAC Heat Pump Heating Performance)**

Compressor 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Compressor 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Backup Strip Heat	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**Unit Number 2 Designation:** \_\_\_\_\_  
 Location of Existing Thermostat \_\_\_\_\_  
 Manufacturer: \_\_\_\_\_  
 Model: \_\_\_\_\_  
 Rated Cooling Tons: \_\_\_\_\_  
 Rated Heating BTU's: \_\_\_\_\_  
 System Type: Gas/Electric \_\_\_\_\_ Heat Pump \_\_\_\_\_  
                   Packaged \_\_\_\_\_ Split \_\_\_\_\_  
                   Yes \_\_\_\_\_ No \_\_\_\_\_  
 Economizer Installed: \_\_\_\_\_  
 HVAC Unit Electric Service Voltage: \_\_\_\_\_ Phase: 1 \_\_\_\_\_ 3 \_\_\_\_\_  
 Number of Cooling Stages: \_\_\_\_\_ Number of Heating Stages: \_\_\_\_\_  
 Hours / Day for Cooling \_\_\_\_\_ Hours per Day for Heating \_\_\_\_\_  
 Days / Year for Cooling \_\_\_\_\_ Days per Year for Heating \_\_\_\_\_

**A/C Cool (HVAC Air Conditioning Performance)**

Compressor 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Compressor 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Indoor Fan	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**G/E Heat (HVAC Gas / Electric Heating Performance)**

Gas Fuel Input 1 <sup>st</sup> Stage	BTU	_____						
Gas Fuel Input 2 <sup>nd</sup> Stage	BTU	_____						
Heat Output 1 <sup>st</sup> Stage	BTU	_____						
Heat Output 2 <sup>nd</sup> Stage	BTU	_____						
Combustion Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Combustion Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**H/P Heat (HVAC Heat Pump Heating Performance)**

Compressor 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Compressor 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Backup Strip Heat	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**Unit Number 3 Designation:** \_\_\_\_\_  
 Location of Existing Thermostat \_\_\_\_\_  
 Manufacturer: \_\_\_\_\_  
 Model: \_\_\_\_\_  
 Rated Cooling Tons: \_\_\_\_\_  
 Rated Heating BTU's: \_\_\_\_\_  
 System Type: Gas/Electric \_\_\_\_\_ Heat Pump \_\_\_\_\_  
                   Packaged \_\_\_\_\_ Split \_\_\_\_\_  
                   Yes \_\_\_\_\_ No \_\_\_\_\_  
 Economizer Installed: \_\_\_\_\_  
 HVAC Unit Electric Service Voltage: \_\_\_\_\_ Phase: 1 \_\_\_\_\_ 3 \_\_\_\_\_  
 Number of Cooling Stages: \_\_\_\_\_ Number of Heating Stages: \_\_\_\_\_  
 Hours / Day for Cooling \_\_\_\_\_ Hours per Day for Heating \_\_\_\_\_  
 Days / Year for Cooling \_\_\_\_\_ Days per Year for Heating \_\_\_\_\_

**A/C Cool (HVAC Air Conditioning Performance)**

Compressor 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Compressor 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Indoor Fan	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**G/E Heat (HVAC Gas / Electric Heating Performance)**

Gas Fuel Input 1 <sup>st</sup> Stage	BTU	_____						
Gas Fuel Input 2 <sup>nd</sup> Stage	BTU	_____						
Heat Output 1 <sup>st</sup> Stage	BTU	_____						
Heat Output 2 <sup>nd</sup> Stage	BTU	_____						
Combustion Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Combustion Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**H/P Heat (HVAC Heat Pump Heating Performance)**

Compressor 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Compressor 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Backup Strip Heat	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**Unit Number 4 Designation:** \_\_\_\_\_  
 Location of Existing Thermostat \_\_\_\_\_  
 Manufacturer: \_\_\_\_\_  
 Model: \_\_\_\_\_  
 Rated Cooling Tons: \_\_\_\_\_  
 Rated Heating BTU's: \_\_\_\_\_  
 System Type: Gas/Electric \_\_\_\_\_ Heat Pump \_\_\_\_\_  
                   Packaged \_\_\_\_\_ Split \_\_\_\_\_  
                   Yes \_\_\_\_\_ No \_\_\_\_\_  
 Economizer Installed: \_\_\_\_\_  
 HVAC Unit Electric Service Voltage: \_\_\_\_\_ Phase: 1 \_\_\_\_\_ 3 \_\_\_\_\_  
 Number of Cooling Stages: \_\_\_\_\_ Number of Heating Stages: \_\_\_\_\_  
 Hours / Day for Cooling \_\_\_\_\_ Hours per Day for Heating \_\_\_\_\_  
 Days / Year for Cooling \_\_\_\_\_ Days per Year for Heating \_\_\_\_\_

**A/C Cool (HVAC Air Conditioning Performance)**

Compressor 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Compressor 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Indoor Fan	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**G/E Heat (HVAC Gas / Electric Heating Performance)**

Gas Fuel Input 1 <sup>st</sup> Stage	BTU	_____						
Gas Fuel Input 2 <sup>nd</sup> Stage	BTU	_____						
Heat Output 1 <sup>st</sup> Stage	BTU	_____						
Heat Output 2 <sup>nd</sup> Stage	BTU	_____						
Combustion Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Combustion Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

**H/P Heat (HVAC Heat Pump Heating Performance)**

Compressor 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Compressor 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Backup Strip Heat	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 1 <sup>st</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____
Outdoor Fan 2 <sup>nd</sup> Stage	Volts	_____	Amps	_____	Phase	_____	KW	_____

# Lighting Systems

Number of Lighting Zones: \_\_\_\_\_  
Indoor Schedule: \_\_\_\_\_  
Outdoor Signage Schedule \_\_\_\_\_  
Outdoor Parking Schedule \_\_\_\_\_  
Outdoor Canopy Schedule \_\_\_\_\_

Existing lighting contactors available: Yes \_\_\_\_\_ No \_\_\_\_\_

How many lighting contactors available: \_\_\_\_\_

## Lighting Zone Descriptions

Description of Zone #1: \_\_\_\_\_

Circuit #1      Volts    \_\_\_\_\_    Amps    \_\_\_\_\_    Phase    \_\_\_\_\_    KW    \_\_\_\_\_

Description of Zone #2: \_\_\_\_\_

Circuit #2      Volts    \_\_\_\_\_    Amps    \_\_\_\_\_    Phase    \_\_\_\_\_    KW    \_\_\_\_\_

Description of Zone #3: \_\_\_\_\_

Circuit #3      Volts    \_\_\_\_\_    Amps    \_\_\_\_\_    Phase    \_\_\_\_\_    KW    \_\_\_\_\_

Description of Zone #4: \_\_\_\_\_

Circuit #4      Volts    \_\_\_\_\_    Amps    \_\_\_\_\_    Phase    \_\_\_\_\_    KW    \_\_\_\_\_

Description of Zone #5: \_\_\_\_\_

Circuit #5      Volts    \_\_\_\_\_    Amps    \_\_\_\_\_    Phase    \_\_\_\_\_    KW    \_\_\_\_\_

Description of Zone #6: \_\_\_\_\_

Circuit #6      Volts    \_\_\_\_\_    Amps    \_\_\_\_\_    Phase    \_\_\_\_\_    KW    \_\_\_\_\_

Description of Zone #7: \_\_\_\_\_

Circuit #7      Volts    \_\_\_\_\_    Amps    \_\_\_\_\_    Phase    \_\_\_\_\_    KW    \_\_\_\_\_

Description of Zone #8: \_\_\_\_\_

Circuit #8      Volts    \_\_\_\_\_    Amps    \_\_\_\_\_    Phase    \_\_\_\_\_    KW    \_\_\_\_\_

# Submetering

## Submetering Channel Description

Channel	Meter Name	Yes / No	If Yes is Pulse Output Available?
1	Electric	_____	_____
	Pulse Conversation Factor	_____	Watts / Pulse _____
	Electric Submeter Point:	Voltage _____	_____
		Amperage _____	_____
		Phase _____	_____
		Wye or Delta Circuit _____	_____
		Location of Submeter _____	_____
2	Natural Gas	_____	_____
	Pulse Conversation Factor (Therms / Pulse)	_____	_____
	Natural Gas Submeter Point:	Line Size _____	_____
		Pressure _____	_____
		Location of Submeter _____	_____
3	Water	_____	_____
	Pulse Conversation Factor (Gallons / Pulse)	_____	_____
	Water Submeter Point:	Line Size _____	_____
		Pressure _____	_____
		Location of Submeter _____	_____
4	_____	_____	_____
5	_____	_____	_____
6	_____	_____	_____

## Digital Points to be Monitored / Measured

Channel	Parameter Name	Description On	Description Off	Alarm Delay	Alarm Condition
1	Electric Submeter				
2	Natural Gas Submeter				
3	Water Submeter				
4	_____	_____	_____	_____	_____
5	_____	_____	_____	_____	_____
6	_____	_____	_____	_____	_____
7	_____	_____	_____	_____	_____
8	_____	_____	_____	_____	_____



## Analog Points to be Monitored / Measured

Channel	Parameter Name	Units	Low Cond	High Cond	Alarm Delay	Conv. Low	Conv. High
1	Air Compressor	PSIG	_____	_____	_____	_____	_____
	Location of Sensor	_____			Type of Sensor	_____	
2	_____	_____	_____	_____	_____	_____	_____
	Location of Sensor	_____			Type of Sensor	_____	
3	_____	_____	_____	_____	_____	_____	_____
	Location of Sensor	_____			Type of Sensor	_____	
4	_____	_____	_____	_____	_____	_____	_____
	Location of Sensor	_____			Type of Sensor	_____	
5	_____	_____	_____	_____	_____	_____	_____
	Location of Sensor	_____			Type of Sensor	_____	
6	_____	_____	_____	_____	_____	_____	_____
	Location of Sensor	_____			Type of Sensor	_____	
7	_____	_____	_____	_____	_____	_____	_____
	Location of Sensor	_____			Type of Sensor	_____	
8	_____	_____	_____	_____	_____	_____	_____
	Location of Sensor	_____			Type of Sensor	_____	