BUILDING ENERGY
AUDIT
TEMPLATE
U.S. DEPARTMENT OF ENERGY

Audit Template Quick Start Guide

For Auditors

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Overview

This guide provides users (auditors, assessors, energy managers) with step-by-step instructions for using the Audit Template (AT), from registration to report submission. It covers getting started with an audit report, audit data entry, and available support resources to streamline the audit data reporting process.

What is Audit Template?

Audit Template is a **web-based tool** that may be used to collect, store and report building energy and water audit data. The tool provides **custom reporting templates** for programs or jurisdictions utilizing Audit Template for collecting audit data.

A user can select the template based on the program that they are reporting data for and after entering building audit data into the tool, users may generate an audit report which lists all the data entered along with calculated tables and charts and submit the building report to the program or jurisdiction. The audit data is available to download in PDF, Microsoft Excel, CSV, and BuildingSync XML* file formats by the user.

> ***Note***:
>
> *The data entry input fields available in the Audit Template and the audit data report follow the ANSI/ASHRAE/ACCA Standard 211-2018 (RA 2023), 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 Level 1 or 2 audit inputs*
> *Program or jurisdiction specific inputs.*
> ★*Fields required for program or jurisdiction reporting.*
>
> *Users may gather data pertaining to an ANSI/ASHRAE/ACCA Standard 211 (RA 2023), Standard for Commercial Building Energy Audit separately prior to using the tool or may enter data directly into the tool.*

* 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.

Getting Started

1. Initial Setup: Registering to Use the Tool

To get started, users must first create an account on the Audit Template website.

- To create an account, visit https://buildingenergyscore.energy.gov.
- Click the "**Register**" button (Figure 1) and fill in the required information, including your email address, which will be used for verification purposes.
- A confirmation email will be sent to your inbox. Click the link in the email to verify your email address and log in using your credentials, once verified.

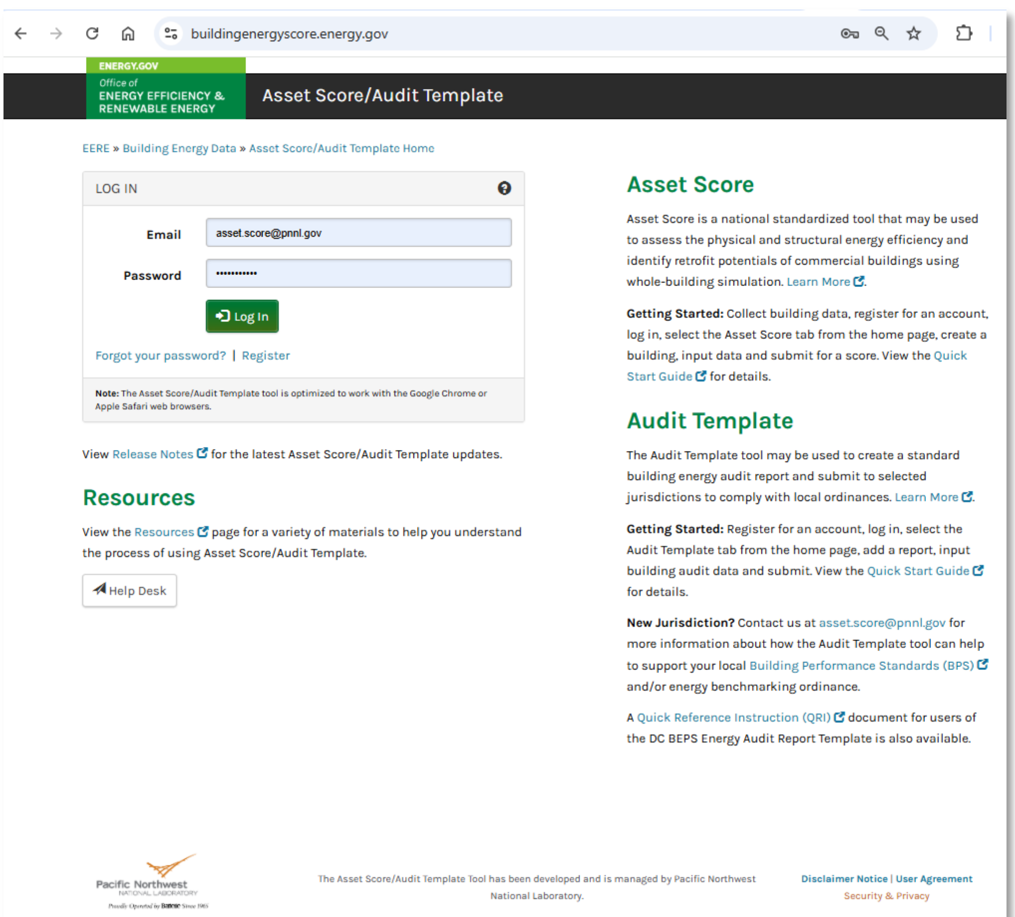

Figure 1. Registration Screen

https://buildingenergyscore.energy.gov/

2. Creating a New Audit Report

Ensure you are in the Audit Template screen. To create a new audit report, follow the steps below:

- Select "**Add Audit Report**".
- Select the appropriate report type from the dropdown. The selected report will identify mandatory reporting requirements and additional optional data points for the program or jurisdiction the user is reporting data to.
- Enter the Building Information requested in the dialogue box. Click the "**Create Building**" button to continue to the audit report data entry screens.

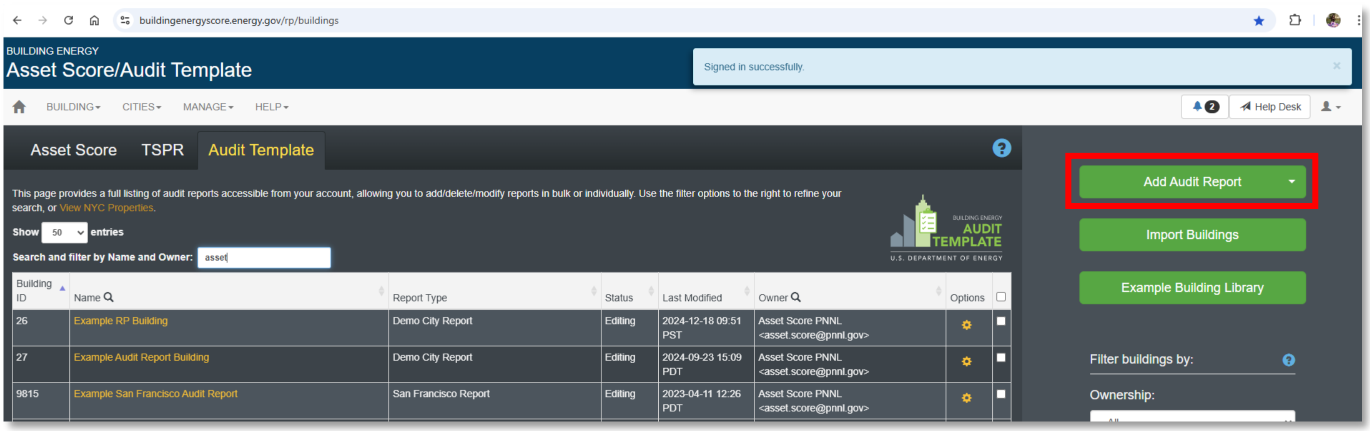

Figure 2. Create a new audit report.

3. Entering Audit Data

Next, proceed to enter audit data across all the visible screens. Each screen captures specific details necessary for the audit report. Detailed instructions for completing each screen are provided below.

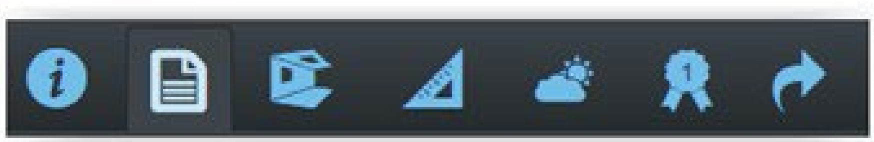

Figure 3: Icons to navigate through different screens

Input Basic Building Information

Enter Building Name, Year Completed, Gross Floor Area, and Location. The data entered when creating a new audit report is available to view and/or edit in this section.

Contact Information and Audit Details

Complete sections that include audit details, including audit completion dates, audit team and building staff contacts.

Facility Description

Provide detailed information about the audited building, including building use types, building envelope characteristics, and major installed equipment components such as HVAC, lighting, and service hot water systems. The information may be based on on-site observations, review of architectural drawings and specifications, measurements, or engineering calculations.

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. Reporting requirements might include metering and energy systems configuration. Benchmarking data, including the building's Energy Use Intensity (EUI) and target energy savings, may also be provided in this section.

Energy Use Breakdown and QA/QC

Enter estimated building energy use by end use for all energy supply sources. Totals will be calculated and displayed in a "**Building End Use Summary**" table. These will be used to verify that the estimated energy use by end-use estimates aligns with annual energy use for each energy supply source.

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.

Submit

Resolve any validation errors shown after clicking "**Validation Errors**" button in the top-right corner. Select the "**Submit Audit Report**" button to mark data collection as complete and download the completed reports, along with the BuildingSync XML file. Users will receive a confirmation email. Some programs might receive submitted reports through Audit Template directly. The user is required to follow their program or jurisdiction's guidelines for meeting submission requirements.

Help Resources

If you need assistance while using Audit Template, several resources are available to guide you:

a) Interactive Help Icons

Throughout the interface, you'll fine "**?**" icons. Click them to go to relevant sections of the online Audit Template User Guide, that provides detailed instructions for the specific feature or content you're viewing.

b) Help Desk Search

Click the "**Help Desk**" button in the top menu to open the support window. Use the "**Got questions?**" search bar to quickly find articles, guides, and resources. You can also visit – Audit Template User Guide to access the detailed user guide.

c) Contact Support

For project-specific support, click "**Contact us**" to submit a support request. This creates a ticket for the Audit Template Help Desk, who will review your issue and respond directly.

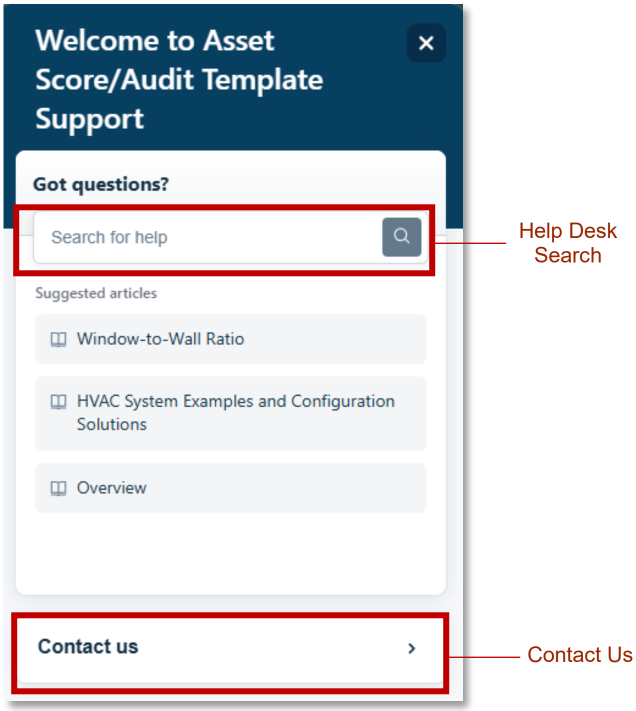

Figure 4: Help Desk and Contact Us