



## ECOS Weatherization

ECOS<sup>®</sup> Weatherization is an Enterprise Software Solution that includes all administrative, financial and operational functions required to support WAP and Utility Energy Efficiency programs. ECOS ties the network together in one common database with secure role-based access. Key features and attributes include:

- ✓ Eligibility & Waiting List
- ✓ Integrated Energy Audit
- ✓ Job Management
- ✓ QCI & Monitoring
- ✓ Vendor Management
- ✓ Energy Assistance Network
- ✓ Budgeting & Billing
- ✓ Customize Program Features
- ✓ Program Management
- ✓ Multi-Grant Management
- ✓ Milestones & Monitoring
- ✓ Document Management
- ✓ Secure Network
- ✓ Data Validation
- ✓ State & Federal Reporting
- ✓ Interoperability
- ✓ Notification System
- ✓ Maintenance & Support Services

## Supporting the Weatherization Assistance Program since 2006

### ECOS Benefits

- PROGRAM INTEGRITY
- OPERATIONAL EFFICIENCIES
- ACCOUNTABILITY & COMPLIANCE
- PERFORMANCE MEASUREMENT
- STANDARDIZED SERVICES
- ADAPTABLE TO CHANGING PRIORITIES
- REAL TIME INFORMATION
- MORE HOUSEHOLDS SERVED
- STATE PLAN SUPPORT
- REDUCED IT COSTS



*Weatherization  
Works*

### Information and Sales

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# ECOS Weatherization

## Features and Attributes

Feature	Description
<b>Eligibility and Waiting List</b>	<ul style="list-style-type: none"> <li>• Eligibility determination based on income and DOE criteria</li> <li>• Import eligible clients from other databases</li> <li>• Rank eligible client on client waiting list</li> <li>• Provide services by area or priority ranking</li> <li>• Customize priority list criteria</li> </ul>
<b>Integrated Energy Audit</b>	<ul style="list-style-type: none"> <li>• DOE Approved and WAP Compliant</li> <li>• Time saving energy audit templates</li> <li>• Intelligent user guidance</li> <li>• Mechanical load sizing and system replacements</li> <li>• ASHRAE compliant with recommendations</li> <li>• Program compliance with task categories</li> </ul>
<b>Job Management</b>	<ul style="list-style-type: none"> <li>• Job costing for crews and contractors</li> <li>• Flexible job costing methods; fixed or variable pricing</li> <li>• Provides task and category SIR's</li> <li>• Customizable work order with integrated SWS</li> <li>• Invoice management</li> <li>• Notification of waivers with comments and history tracking</li> </ul>
<b>QCI and Monitoring</b>	<ul style="list-style-type: none"> <li>• Reconcile estimated versus installed measures</li> <li>• Validate compliance to SWS</li> <li>• Document safety and diagnostic testing</li> <li>• Evaluate contractor performance</li> </ul>
<b>Vendor Management</b>	<ul style="list-style-type: none"> <li>• Contractor and Energy Vendor access</li> <li>• Review and update account information</li> <li>• Procurement of annual bids</li> <li>• Document staff roles, rates and training</li> <li>• Manage fuel delivery types and prices</li> </ul>
<b>Energy Assistance Network</b>	<ul style="list-style-type: none"> <li>• Integrate all agencies in one common platform</li> <li>• Secure limited access to agency data</li> <li>• Centralized program data</li> </ul>
<b>Budgeting and Billing</b>	<ul style="list-style-type: none"> <li>• Network and agency specific budgets</li> <li>• Agency billing to Grantee or funding source</li> <li>• Client Direct, Program Support and Additional Costs</li> <li>• Budgeting and billing history</li> <li>• Expenditures tracked by grants and funding sources</li> </ul>
<b>Customize Program Features</b>	<ul style="list-style-type: none"> <li>• Grantee and Sub-grantee administrative rights</li> <li>• Agency or network wide configuration for program delivery</li> <li>• Documented business rules and processes</li> <li>• 150+ customizable preference settings</li> </ul>
<b>Program Management</b>	<ul style="list-style-type: none"> <li>• Centralized program management and delivery</li> <li>• Connects network of agencies in one unified database</li> <li>• Efficient and transparent program delivery</li> </ul>



<b>Multi-Grant Management</b>	<ul style="list-style-type: none"> <li>• Create and manage multiple funding sources</li> <li>• Set program specific budgets, rules and limits</li> <li>• Customize reports by funding source</li> </ul>
<b>Milestones &amp; Monitoring</b>	<ul style="list-style-type: none"> <li>• Real-time data dashboards of program milestones</li> <li>• Customer, vendor and agency transaction history</li> <li>• Benefit payment and refund tracking</li> <li>• Tracking of client benefits and vendor payments</li> <li>• Tracking program expenditures and budgets</li> </ul>
<b>Document Management</b>	<ul style="list-style-type: none"> <li>• Manage and access program delivery forms and files</li> <li>• Real-time access to required forms</li> <li>• Client, audit, job, billing and agency documents</li> <li>• Backup documentation for program integrity monitoring</li> </ul>
<b>Secure Network</b>	<ul style="list-style-type: none"> <li>• Web based application with remote access</li> <li>• Role based security access</li> <li>• Data encryption</li> <li>• Microsoft Azure Cloud or on premise client hosting</li> </ul>
<b>Data Validation</b>	<ul style="list-style-type: none"> <li>• Intelligent user guidance</li> <li>• Validation of data entry for duplication and compliance</li> </ul>
<b>State &amp; Federal Reporting</b>	<ul style="list-style-type: none"> <li>• Provide all required state and federal reports</li> <li>• Common and customizable reporting</li> <li>• Agency specific or network wide reporting</li> <li>• SQL Server Reporting Services</li> </ul>
<b>Interoperability</b>	<ul style="list-style-type: none"> <li>• Import of existing records (Legacy Data)</li> <li>• Two-way data transfer with flexible format option</li> <li>• Flexible API or XML data transfer</li> </ul>
<b>Notification System</b>	<ul style="list-style-type: none"> <li>• System generated notifications of program events</li> <li>• User generated notifications</li> <li>• Program delivery message board</li> <li>• Notifications integrated with scheduling process</li> </ul>
<b>Maintenance &amp; Support Services</b>	<ul style="list-style-type: none"> <li>• On-demand help desk</li> <li>• Dedicated support by experienced staff</li> <li>• System maintenance and upgrades</li> <li>• Project Oversight including Status, Issue and Management</li> </ul>
<b>Online Application</b>	The customer can initiate an application online and agency staff are notified in ECOS and can review the submission.