

ATAC TAS Checklist

ATAC:

Project ID:

TAS Report Checklist - Required		
1	EEMs/RCxs savings in TAS should approximately match the proposal.	
2	Project uses the current TAS report template. (ODOE projects should use the ODOE template)	
3	Summary table values in the report match the values in the detail EEMs table.	
4	EUL table is included at the end of the report, and the EUL used in measures match that in the EUL table. For example, most RCx will have a 5-year EUL. Supporting information is required if a different value is used. Note that in the case of standard projects where measures have been combined because their scopes cannot be separated, the EULs are weighted based on energy savings per component. The EUL is weighted based on cost for school projects.	
5	School projects should include the most recent 2 years utility data and other projects should include the most recent 3 years utility data.	
6	All relevant existing equipment quantities are documented. For example, if the measure is a boiler upgrade and it does not affect the HVAC system, the ATAC does not need to provide information about the HVAC system or it's parameters but should include any adjacent systems to the boiler that would be affected by the measure.	
7	All relevant existing equipment parameters are documented. For example, AHU upgrade specifications should include: capacity, cooling/heating efficiency, temperature setpoints, CV or VAV, OSA reset (if applicable), economizers (if applicable), etc.	
8	All relevant existing equipment schedules are documented. All non-standard schedules have supporting documentation.	
9	A modified baseline is used If the equipment age is beyond the EUL, if there is fuel change, or if the existing equipment is inoperable.	
10	A table focusing discrepancies/improvements/adjustments between baseline and proposed conditions is included. Note that this should be detailed enough to prevent needing to go to the model or calculation to understand existing and proposed conditions and build a verification plan.	
11	Documentation is included to support the claimed baseline and EEM measure costs. Please note that if the reasoning for a cost is experience with a prior project of a similar nature, the actual cost information (such as a quote or receipt) of the project needs to be provided.	
12	Energy Trust blended utility rates are used to estimate ETO cost savings for the proposed EEMs	

TAS Report Checklist - Conditional		
13	If the TAS includes RCx measures, RCx measures naming start with "RCx - ".	
14	If the model includes all equipment represented by the metered utility data, the energy model calibration is included. Note that with a modified baseline, an energy model calibration based on the existing equipment is still required for whole building models.	
15	If there is an energy model calibration, the modeled monthly energy usage is within 20% and the annual energy usage is within 10% of the site's historical utility data usage. Clarification is included if there is a discrepancy.	
16	If Commercial Buildings Energy Consumption Survey (CBECS) energy end use breakdown is provided, the modeled usage represents the system/building type being modeled.	
17	If the EEM includes equipment replacement, the age of existing equipment is provided.	
18	If a modified baseline is used, the model uses the minimum equipment specifications outlined in Oregon Energy Efficiency Specialty Code (OEESC) or ASHRAE 90.1.	
19	If Non-Energy Benefits (NEBs) are claimed, the supporting documents or explanations are included to detail the benefits	
20	If the study uses an existing baseline, the maintenance savings are encouraged to be claimed. Note that if the study has used a modified baseline, then NEBs cannot be claimed for maintenance of the existing system.	
21	If there is a dependency between measures, an implementation sequence description is included and a corresponding rolling baseline utilized. For example, EEM2 will not be implemented until EEM1 is implemented. <u>If the analysis has not used a rolling baseline</u> , make a note that it will need to be appropriately updated at the PIV stage and ensure the 110C Form contains a note that the max incentive will be lower than what is displayed.	

TAS Calculations		
22	If the calculations are performed using spreadsheets, they are unlocked.	
23	All calculations are clear and transparent.	
24	All calculations use standard engineering methodologies and list data sources where relevant.	
25	All hard-coded values note sources. All values in the spreadsheet must be linked back to their source. That source must be an engineering calculation or hard-coded value with a comment noting its source.	
26	Equipment and system variables (load factor, affinity law exponent, etc.) follow ATAC guidelines. Different values may be used if supporting information was provided.	
27	The calculation inputs match the measures outlined in the report.	
28	The calculation parameters for the baseline and EEM equipment match what was outlined in the report.	
29	Conditional - If the site is under ventilated, the modified baseline complies with code minimum (ASHRAE 90.1) ventilation requirements.	