

IBA HEC IBAEnergy.org Step By Step User Guide For Contractors

Job Status

- Auditor Assigned (Initial Audit) = Auditor to perform and submit initial audit.
- Deferred (mold, etc.) = House is pending resolution of deferral.
- Initial audit/W.O. Submitted = Production team to review, modify and approve initial forms and work order.
- Initial audit/W.O. Incomplete or Redo = Job pending as production team is waiting on auditor for additional information/forms.
- Initial W.O. Approved = Kim to assign job to contractors.
- Sub-contractor work in progress = HVAC, Plumbing, and Electrical subcontractors to perform work.
- Sub-contractor work submitted = HVAC, Plumbing, and Electrical subcontractors completed work and submitted forms on-line. IBA will approve and notify auditor to perform interim audit.
- Auditor to perform Interim Audit = Auditor to perform and submit interim audit.
- Interim Audit – Failed = IBA will review and notify appropriate subcontractor of necessary re-work.
- Interim audit completed / Shell work in progress = Shell contractor to perform work.
- Shell contractor work submitted = Shell contractor completed work and submitted forms on-line. IBA will approve and notify auditor to perform final audit.
- Auditor to perform final audit = Auditor to perform and submit final audit.
- Final audit submitted = County Energy Managers review and approve final audit.
- Final Audit – Failed - IBA will review and notify appropriate contractor of necessary re-work.
- Final Job Approval = Job completed and approved by IBA.

Accept or Decline Jobs

- Go to www.ibaenergy.org, enter your User Name and Password
- Go to “Job Assignments” to see list of jobs to either accept or decline
- To View Work Order Go to Review JobSites
- Select Job Number
- Select W.O. Print
- Select Combined Work Order to view entire job
- Select Individual Contractor Work Orders to view separate work orders
- Answer “Open” When prompted if you would like to Save or Open this file
- Print Your Individual Work Orders
- “Return to Job” Will take you back to the Client’s Main Page
- Select Job Assignments
- Select Job Number
- Either Accept or Decline Job

Print Work Order

- Go to www.ibaenergy.org, enter your User Name and Password
- Go to Review JobSites
- Enter the Client ID number in the Job Number location click “Search” Or At View Mode, use the drop down menu, select Jobs by Status, Days in Status to view your clients grouped by job status, find the client ID you want from the list and click on the “Job Number”
- Confirm you have selected the correct client, address & county.
- Select “W.O.Print”
- Select the view you would like to see or print
- Answer “Open” When prompted if you would like to Save or Open this file

- Select Print
- “Return to Job” Will take you back to the Client’s Main Page

View and Print Forms

- Go to www.ibaenergy.org, enter your User Name and Password
- Go to Review JobSites
- Enter the Client ID number in the Job Number location click “Search” Or At View Mode, use the drop down menu, select Jobs by Status, Days in Status to view your clients grouped by job status, find the client ID you want from the list and click on the “Job Number”
- Confirm you have selected the correct client, address & county
- Click on Forms at the top of the page
- Existing Uploads: Shell Contractors Print Moisture Assessment Form, sign after shell work is completed and re upload with your added signature.
- Existing Uploads & Existing Forms: View uploaded pictures, and other documents relevant to the job, print forms as needed.

Upload Forms and Submit Work as Complete

- Confirm you have selected the correct client
- Select Forms at the top of the page
- If you need to edit an existing form, click “Edit” located next to the form. When finished editing, click “Save”.
- Click “Upload” at the top of the page and upload the following documentation.
 - A. Shell Contractor Signed Moisture Assessment (must be individually uploaded) (Use PDF Format)
 - B. Contractor invoice must match online work order (PDF Format)
 - C. Other documentation as needed (furnace, new furnace installation, water heater, gas cook stove, DSTO, blower door, etc.) (Use PDF Format)
- Type a description for the items to be uploaded
- Select type of files: PDF, Pictures or Other
- You may see a display saying “This page contains both secure and nonsecure items. Do you want to display the nonsecure items?” Click “Yes”
- Click “Add Files”
- Select items located on your computer to upload
- Select “Upload Files”
- Once all items are uploaded click “Return to original page”
- Select “Work Order”
 - Contractor will need to check each item completed
 - Contractor will need to enter the Quantity amount if different then amount on present work order
 - When you have finished marking all items and quantities, you will need to go to bottom of page and select “Save W.O. & Return”.
- Scroll to the bottom of the page to “Action to Take”
- From the drop down menu, select “Submit W.O. Contractor Work Complete”
- Click “Take Action”