

City of Portland Home Energy Score Assessor Participation Agreement

Completed City of Portland Home Energy Score Assessor Participation Agreement must be printed and SIGNED, then scanned and sent electronically to: pdxhes@earthadvantage.org

Direct questions to the email above, or call Earth Advantage at [503-468-3482](tel:503-468-3482)

For a complete guide on how to become an authorized City of Portland Home Energy Score Assessor, please contact pdxhes@earthadvantage.org.

Required Information

Home Energy Assessor Name _____

Company Name _____

Current CCB License #
(Numbers only, no dashes) _____

USDOE Home Energy Score Assessor ID _____

Company Address
(Street No., Street Name, City, State, Zip) _____

Company Phone
(10-digit number, no dashes) _____

Home Energy Assessor Cell
(10-digit number, no dashes) _____

Company Email Address _____

Company Website _____

1. Introduction

This Home Energy Score Assessor Participation Agreement (Agreement) is entered into by and between Earth Advantage, Inc. (Earth Advantage), the city of Portland's designated City of Portland Home Energy Score Program Quality Assurance Provider, and _____ (Home Energy Assessor).

By signing below, Home Energy Assessor agrees to register with Earth Advantage for Quality Assurance services related to the City of Portland Home Energy Score program and abide by the *City of Portland Administrative Rules for Residential Energy Performance Rating and Disclosure*, *Earth Advantage's City of Portland Home Energy Score Quality Assurance Protocol (Appendix A)*, *Earth Advantage's Customer Dispute Protocol (Appendix B)*, and the Terms and Conditions contained herein.

Home Energy Assessor understands that registration with Earth Advantage does not constitute an endorsement of any kind on the part of Earth Advantage or the city of Portland. Home Energy Assessor shall not state or imply any such endorsement, either directly or indirectly, and shall not claim association with Earth Advantage or the City of Portland in any capacity other than as an independent home energy assessor authorized to provide the approved City of Portland Home Energy Score. Home Energy Assessor shall be solely responsible for all representations made to customers regarding the City of Portland Home Energy Score Program or work performed for a customer under the City of Portland Home Energy Score Program.

2. Home Energy Assessor Obligations

Home Energy Assessor acknowledges that it has the necessary qualifications, licensing, insurance, competence, and experience required to fulfill their respective responsibilities in providing the services and deliverables detailed in program standards.

Home Energy Assessor agrees to:

- a. Train internal staff, as applicable, to field customer inquiries about the City of Portland Home Energy Score Program;
- b. Correct, without charge, any requests for correction from Earth Advantage related to any failure to abide by program standards, such as insufficient or untimely reporting of assessment results, within five (5) working days of the request;
- c. Repair, without charge, damage to a customer's property resulting from an assessment or other action or inaction arising under or related to providing Home Energy Assessor services as part of the City of Portland Home Energy Score Program;
- d. Immediately report to Earth Advantage at pdxhes@earthadvantage.org, all customer complaints or conflicts that are not resolved to customer's full satisfaction.
- e. Copy Earth Advantage staff at pdxhes@earthadvantage.org on all customer complaint resolution communications.
- f. Prior to or immediately following an assessment, provide customer with a written statement via email, customer contract, invoice or payment receipt that stipulates that the Home Energy Score Report and any associated information will not be treated as confidential by the City of Portland and will be made publicly available. The following statement is provided as template language and can be used by Assessor in customer documents:

"Individual consent: In accordance with Portland City Code Chapter 17.108 (adopted by Ordinance No. 188413 and effective January 1, 2018), Home Energy Scores produced in Portland will be made publicly available through real estate listings. Thus, these scores and any associated information will not be treated as confidential. The customer hereby consents to allow the Home Energy Score Report to be collected and stored in order to be disclosed through accepted and secure methods of data transportation, for the specific purpose of publishing it on a database which will auto-populate or otherwise be uploaded to the Regional Multiple Listing Service (RMLS) and/or similar real estate listing services and be identifiable to homeowner's property on the listing service."

Home Energy Assessor shall provide the form customer agreement to Earth Advantage for its review prior and approval prior to using the agreement with any homeowner.

- g. Presentations conducted for the purposes of providing information on the City of Portland Home Energy Score Program to real estate agents, brokers, appraisers, and lenders, will be conducted using approved slides from the presentation template provided by Earth Advantage (in PowerPoint format) and/or a summary overview provided by Earth Advantage. Home Energy Assessor will provide Earth Advantage with participant contact list if continuing education credits are to be provided as part of the delivery by Home Energy Assessor or employees of Home Energy Assessor of the approved City of Portland Home Energy Score Program presentation.

3. Earth Advantage Obligations

Earth Advantage shall:

- a. Authorize Home Energy Assessor to participate in the City of Portland Home Energy Score Program within the geographic boundary of the city of Portland, Oregon. Nothing in this agreement shall be construed as an assignment or a grant to Home Energy Assessor of any right, title, or interest in, or to the ownership of any materials or software provided by Earth Advantage under this Agreement or to the energy score data acquired by Home Energy Assessor, it being understood that all ownership rights relating to energy score data are reserved by Earth Advantage except for rights granted to the Home Energy Assessor as specified in this Agreement.
- b. Provide required program orientation, mentorship, and on-going quality assurance sessions to Home Energy Assessor, for the fees outlined below.
- c. Maintain a quality control system related to the Home Energy Assessor's performance.
- d. Provide continuing education credits upon request for delivery of approved City of Portland Home Energy Score Program presentations to real estate agents, brokers, appraisers, and lenders.

4. Indemnification

Home Energy Assessor acknowledges that the city of Portland has developed the City of Portland Home Energy Score Ordinance solely for the purpose of promoting energy efficiency assessments and improvements, and that neither the city of Portland nor Earth Advantage have responsibility of any kind for, and shall have no liability arising out of the performance of, any service, installation, operation, or maintenance of services provided by Home Energy Assessor.

Home Energy Assessor agrees to release, defend, indemnify, and hold harmless Earth Advantage and the city of Portland, including their officers, directors, employees and agents, from and against any claims, actions, demands, costs, damages or lawsuits, arising out of or connected with Home Energy Assessor providing assessments related to the City of Portland Home Energy Score Program.

5. Changes in Terms; Severability

Earth Advantage reserves the right to alter the *City of Portland Home Energy Score Quality Assurance Protocol* and *Customer Dispute Protocol* at any time with 30 days prior notice. Current versions of these documents will be made available upon request by emailing pdxhes@earthadvantage.org.

If any provision of this Agreement, the *City of Portland Home Energy Score Quality Assurance Protocol*, or the *Customer Dispute Protocol* are determined to be unlawful, void, or for any reason unenforceable, then that provision shall be deemed severable and shall not affect the validity or enforceability of any remaining provisions.

6. Dispute Resolution

Any controversy or claim arising out of the Agreement, or the breach, termination, or invalidity of the Agreement shall be settled by attempting mediation, then arbitration in the event a mediated settlement cannot be reached. Any mediation or arbitration shall take place in Oregon. Any award, order, or

judgment made pursuant to such arbitration shall be deemed final and shall be entered and enforced in any court of competent jurisdiction.

7. Governing Law

The Agreement will be governed by the laws of the State of Oregon.

8. Termination

Either party may terminate the Agreement upon 1 day written notice to the other party. The termination takes effect immediately and Home Energy Assessor shall stop any and all work performed under the Agreement. Upon termination of this Agreement, Home Energy Assessor will no longer be authorized to carry-out any Home Energy Score Assessments or provide City of Portland Home Energy Score Reports.

Earth Advantage may terminate this Agreement for cause under the following conditions:

1. Home Energy Assessor breaches any provision of the Agreement; or
2. In the event the Home Energy Assessor fails or refuses to abide by modifications as provided for in this Agreement; or
3. Home Energy Assessor neglects obligations pursuant to this Agreement; or
4. Home Energy Assessor defames, slanders, or libels the City of Portland Home Energy Score Program, Earth Advantage, or other program representatives; or
5. Proof of fraud on the part of the Home Energy Assessor, including:
 - a. Submission of false information
 - b. Gross negligence
 - c. Willful misconduct
 - d. Misrepresentation or false advertising

If Earth Advantage believes that any of the conditions above have been met, the following termination process will be followed:

- A recommendation for termination letter will be issued and sent to both the Assessor's email and physical address provided above.
- Assessor will then have 30 days to appeal the recommendation to Earth Advantage and the City of Portland, Bureau of Planning and Sustainability.
- Based on the appeal, Earth Advantage will make a final recommendation to the City of Portland, Bureau of Planning and Sustainability.
- The City of Portland, Bureau of Planning and Sustainability will have final authority on termination.

Home Energy Assessor agrees, in the event of termination for cause, to waive any claim for damages, including loss of anticipated revenue and profit of any assessment, resulting from termination.

9. Term

The agreement shall be effective from the date of execution of the Agreement until June 30, 2020. The parties may extend this Agreement by mutual written consent annually thereafter.

10. Fees for Services

- \$25 per generated City of Portland Home Energy Score, whether initial or final (to be paid by Home Energy Assessor to Earth Advantage);
- Fees to be paid monthly, net 30 days, with 18% annual interest applied to outstanding balances;
- Fees to be paid whether or not the Home Energy Assessor charges or collects a fee for the performance of the service.

Additional one-time fees of \$75 for program orientation session and \$150 per assessor mentoring session are also to be paid by Home Energy Assessor to Earth Advantage under the Agreement, net 30 days of receipt of the service, with 18% annual interest applied to outstanding balances.

Failure to pay any fees within 60 days of invoicing shall be deemed a material breach of the Agreement and shall entitle Earth Advantage to:

- Impose an interest charge on any such unpaid amounts at the highest rate allowed by law; and/or
- Immediately terminate the Agreement.

The Home Energy Assessor is solely responsible for payment of all fees charged by Earth Advantage for services rendered to Home Energy Assessor and/or Home Energy Assessor's company on behalf of Home Energy Assessor.

At any time during the term of the Agreement, Earth Advantage may propose a change in the fees noted above. Any fee change must be made with at least sixty days written notice given to the Home Energy Assessor and approval in writing by the City of Portland Bureau of Planning and Sustainability.

The amount Home Energy Assessor charges a customer to perform an assessment as part of the City of Portland Home Energy Score Program shall be determined by the Home Energy Assessor.

11. Insurance Requirements

Home Energy Assessor shall name Earth Advantage as additionally insured under Home Energy Assessor's insurance and provide Earth Advantage with insurance documentation attesting to this status prior to gaining authorization to participate in the City of Portland Home Energy Score program.

Name _____

Title _____

Signature _____

Date _____

Appendix A: QUALITY ASSURANCE PROTOCOL

Introduction

Part 1: Terms

Part 2: Agreement

Part 3: Earth Advantage / Mentor Responsibilities

Part 4: Enrollment/Training/Qualifications for home energy assessor

Part 5: Mentoring Process

Part 6: Quality Assurance Process

Part 7: Maintaining home energy assessor status

Introduction:

Earth Advantage is the sole Quality Assurance Provider working on behalf of the City of Portland Bureau of Planning and Sustainability, to implement quality assurance requirements for the City of Portland Home Energy Score program and policy. Earth Advantage verifies home energy assessor qualifications, mentoring, performs in-field Quality Assurance Rescoring and data analysis to ensure that home energy assessors report data accurately and that home energy scores are generated in accordance with United States (US DOE) and Oregon Department of Energy (ODOE) participation requirements and guidelines.

Part 1: Terms:

City of Portland Home Energy Score policy – The Portland City Council adopted the PCC 17.108 which requires sellers of single-family homes to obtain a home energy report, including a home energy score, from a licensed home energy assessor and disclose the score and the report prior to listing a home publicly for sale in Portland on or after January 1, 2018.

City of Portland Home Energy Score program - The program will administer the City of Portland Home Energy Score policy.

Home energy assessor - Authorized assessors verified by the City of Portland Home Energy Score program to do walk-through assessments to produce the home energy score and home energy report.

Earth Advantage - Sole quality assurance provider working on behalf of the City of Portland Home Energy Score program.

Mentor - The City of Portland designated Earth Advantage to appoint mentors to provide required mentoring on first program walk through and home energy score.

Home energy report - City of Portland Home Energy Score branded and compliant report, which includes home energy score and information about the home's current conditions and upgrade opportunities.

Home energy score - Like a miles-per-gallon rating for a car, the home energy score is an easy-to-produce rating designed to help homeowners and homebuyers gain useful information about a home's energy performance. Based on an in-home assessment, the home energy score lets a homeowner understand how efficient the home is and how it compares to others.

Part 2: Agreement:

Agreement between home energy assessor and Earth Advantage (Quality Assurance Provider).

By signing the home energy assessor participation agreement, the home energy assessor agrees to the terms of the Quality Assurance Protocol. The agreement between home energy assessor and Earth Advantage is a mutual understanding between a home energy assessor and Earth Advantage. As a condition of performing home energy scores, US DOE requires that each home energy assessor enter into this agreement with Earth Advantage in order to receive quality assurance in accordance with these standards. The Quality Assurance Protocol describes these standards.

Part 3: Earth Advantage / Mentor Responsibilities:

Mentor Responsibilities

- Mentors must be designated by US DOE, City of Portland and Earth Advantage.
- Earth Advantage will assign new home energy assessors to Mentors.
- Implement in-field walk through together of the home energy assessor candidate's first home score.
- Ensure corrections are implemented if results for the same home differ by more than one point during a mentoring session.

Earth Advantage (QA Provider) Responsibilities:

- Implement in-field QA re-scoring on 5% of all home energy scores in the City of Portland Home Energy Score program.
- Randomly select homes to re-score to ensure home data is entered correctly.

- Ensure corrections are implemented if results for the same home differ by more than one point

Part 4: Enrollment/Training/Qualifications for home energy assessor:

Program Application and Enrollment Process:

The program administrators will provide interested home energy assessor candidates with a home energy assessor Roadmap, which outlines requirements to become an authorized City of Portland Home Energy Score home energy assessor, and will gather the necessary information about each applicant. The program administrators will ensure that each applicant completes the program enrollment and training requirements, and has obtained their Home Energy Score - Assessor ID before the applicant is officially enrolled in the program. The program administrators will regularly communicate with applicants any missing or incorrect information that is needed during the enrollment process.

Qualifications:

An authorized home energy assessor in the City of Portland Home Energy Score program is trained, certified, and actively qualified in accordance with the US DOE Home Energy Score protocol, ODOE Home Energy Score Systems requirements, and has completed City of Portland requirements such as Orientation and compliant home energy report generator software training. Required qualifications outlined in more details in the home energy assessor Roadmap.

Orientation Process:

After an Assessor has completed the enrollment process, program administrators will hold a mandatory session to ensure that home energy assessors have access and understand the home energy score, accompanying home energy report, promotional tools, and the quality assurance requirements. Program administrators will also coordinate with Assessors to arrange for their on-site mentoring session, and ensure that they are prepared for the session.

Data collection and home energy reports:

Each home energy assessor is responsible for collecting the building data necessary to generate a compliant home energy report for the City of Portland Home Energy Score program. The compliant report is produced through a software tool called the Green Building Registry. The program will provide home energy assessors a data collection form and instructions that consist of the required input fields for generating a report. For assessments where the home energy assessor has not provided a compliant home energy report, adequate information, or appears to rely on default information in cases

where home-specific data should be known, the program administrators may request additional information or corrections.

Part 5: Mentoring Process:

- The first Home Energy score conducted by an home energy assessor candidate will be a mentored session.
- During the mentored session, the Mentor and home energy assessor will do a walk through together.
- Home energy assessor candidate is encouraged to communicate with the mentor through the walkthrough so that the mentor can offer guidance on best practices, share their experience and correct the new home energy assessor candidate should there be any misunderstandings of data collection, measurements, and assumptions.
- If home energy assessor attended an Earth Advantage guided US DOE Simulation training, then a group mentoring session will be available to fulfill this mentoring requirement.
- Once a home energy score and home energy report is generated, the home energy assessor will need to correct any errors or deficiencies related to the home energy reports.
- If significant quality assurance assistance is needed during the mentored home energy score, the home energy assessor candidate's second assessment will be mentored. During the second mentored assessment, if significant quality assurance assistance is needed, Mentor to require home energy assessor candidate to complete additional training courses before further home energy reports can be provided.
- If the mentored scoring session format is one-on-one and provided by Earth Advantage, this counts towards the 5% quality assurance re-score.
- If the mentored scoring session format is one-on-one and is not Earth Advantage, this does not count towards the 5% quality assurance re-score.
- If the mentored scoring session format is a group format, this does not count towards the 5% Quality Assurance Re-Scores, but it will satisfy the Mentor requirements.

Part 6: Quality Assurance Process:

- Earth Advantage will contact the home energy assessor to coordinate a time to meet on-site and do a Quality Assurance Re-score walk through of the home.
- In this visit, Earth Advantage and home energy assessor do not need to do the walk through side by side. Earth Advantage and home energy assessor must not

discuss the walk through and calculations until after each has completed data entry and produced a home energy score.

- Discussion between Earth Advantage and home energy assessor is recommended after the independent re-score of the home is completed to identify differences in interpretation or measurement and agree on a preferred approach going forward.
- The house must be in similar condition during both walk throughs and use the same level of data.
- If a blower door test was performed by the home energy assessor during the walk through, then it must be done during the Earth Advantage re-score as well.
- The home energy scores of the home energy assessor and the Earth Advantage must be comparable.
 - If the results for the same home differ by more than one point (on the 10-point scale), another re-score of the home may be required as determined by the QA Provider.
 - If a home energy assessor produces three of five consecutive home energy scores that are not comparable with quality assurance re-scores, re-training is required and must be completed before the home energy assessor can score more homes. Earth Advantage will monitor and identify these QA issues and will report them to the DOE.
- Besides in-field quality assurance described above, US DOE and Earth Advantage will be doing aggregate data review at minimum on a quarterly basis. During the first year of this program, aggregate review will typically occur more frequently. If significant potential errors are discovered, Earth Advantage will communicate any necessary follow-up to the home energy assessor. The home energy assessor may need to re-score the home.

Part 7: Maintaining authorized home energy assessor status:

Authorized status: The candidate home energy assessor cannot be an authorized home energy assessor until they have written approval from Earth Advantage.

In addition to obtaining the program's qualifications requirements, each home energy assessor must do the following maintain authorization:

Assessors need to score homes on a consistent basis in order to maintain an authorized status; each home energy assessor must produce an official home energy score for at least one home every six months (180 days) in order to be considered authorized.

- Any home energy assessor who has not scored a home in 180 days will lose their authorized status and be changed to unauthorized. Earth Advantage or US DOE will send an email to notify the assessor if status has been changed to unauthorized.
- Unauthorized home energy assessors will be required to complete a training refresher exercise on the Sim training and testing site in order to be re-authorized.
- The home energy assessor's status will be re-authorized once they have successfully completed the exercise correctly in the Sim Tool. Once Sim tool access has been provided, the home energy assessor can train and test at any time – no direct oversight is required to complete the Sim refresher training exercise.
- Earth Advantage or US DOE will email you to notify you that your status is re-authorized.

Any home energy assessor participating in the City of Portland Home Energy Score program may have their authorization suspended or removed in any of the following circumstances:

- Failure to take corrective action - a home energy assessor has failed to follow the requirements as established by these standards.
- Submission of false information
- Gross negligence
- Willful misconduct
- Misrepresentation or false advertising by the home energy assessor in relation to authorization status or with respect to any service provided by the home energy assessor
- Not abiding by the Quality Assurance Protocol
- Failure to disclose and resolve a conflict of interest
- Home energy assessor goes out of business
- Home energy assessor does not maintain active status of qualifying credentials and/or licenses referenced in the City of Portland Home Energy Score home energy assessor Roadmap.
- Inappropriate claiming of addresses in the Green Building Registry.

Earth Advantage shall follow due process procedures in relation to suspension or decertification actions against a home energy assessor. Earth Advantage may, at its discretion, initiate a suspension or decertification action against an authorized home energy assessor by providing a written notice of the action. The City of Portland Bureau of Planning and Sustainability will have final jurisdiction over suspension or removal decisions.

Appendix B: Customer Dispute Resolution Protocol

This City of Portland Home Energy Score Customer Dispute Resolution Protocol describes how and under what circumstances disputed home energy scores or other potential customer complaints will be evaluated by Earth Advantage and the city of Portland. The City of Portland Home Energy Score Dispute Resolution Protocol contains a process that includes:

- **Triggers:** Circumstances in which the City of Portland Home Energy Score Dispute Resolution Protocol would be initiated;
- **Resolutions:** Actions taken by the home energy assessor, Earth Advantage, City of Portland, or other parties to resolve an issue, dispute, or complaint;
- **Penalties:** If applicable, the steps taken by Earth Advantage, City of Portland or other parties in cases where a home energy assessor has been found to be in error or in non-compliance with *City of Portland Administrative Rules for Residential Energy Performance Rating and Disclosure* and/or *Earth Advantage's City of Portland Home Energy Score Quality Assurance Protocol* or the Terms and Conditions of the City of Portland Home Energy Score Assessor Participation Agreement.

Trigger: Customer complaint/dispute is lodged directly with home energy assessor.

Resolution steps:

- Step 1: Home energy assessor resolves customer's complaint to full satisfaction. If this is not successful then;
- Step 2: Home energy assessor reports customer complaint to Earth Advantage with two (2) business days.
- Step 3: Earth Advantage conducts review of relevant home energy score and associated data. Depending on the homeowner concern and information gathered during desk review, a follow-up in- field assessment with the home energy assessor may be needed.
- Step 4: If Earth Advantage identifies errors:
Earth Advantage instructs home energy assessor to correct the home energy score or take other corrective action. Earth Advantage will inform the home energy assessor in writing when QA re-score is ready and can be sent to the homeowner. The home energy assessor must copy Earth Advantage in correspondence of resolution with homeowner with QA re-score. If not copied, Earth Advantage reserves the right to follow-up with the homeowner directly to confirm the resolution.

If Earth Advantage does not identify errors:

Earth Advantage provides home energy assessor in writing QA re-score and report to provide customer confirming accuracy of score. The home energy assessor must copy Earth Advantage in correspondence with homeowner with QA re-score. If not copied, Earth Advantage reserves the right to follow-up with the home owner directly to confirm the resolution.

Trigger: Customer complaint/dispute is lodged with city of Portland

Resolution steps:

- Step 1: City of Portland emails customer complaint/dispute to Earth Advantage.

Step 2: Earth Advantage sends notice of complaint to home energy assessor. Home energy assessor reviews customer file and resolves customer's complaint to full satisfaction. If this is not successful then;

Step 3: Earth Advantage conducts review of relevant home energy score. Depending on the homeowner concern and information gathered during desk review, a follow-up in- field assessment with the home energy assessor may be needed.

Step 4: If Earth Advantage identifies errors:
Earth Advantage instructs home energy assessor to correct the home energy score or take other corrective action. Earth Advantage will inform the home energy assessor in writing when QA re-score is able to be sent to the homeowner. The home energy assessor must copy Earth Advantage in correspondence of resolution with homeowner with QA re-score.

If Earth Advantage does not identify errors:
Earth Advantage provides home energy assessor in writing QA re-score and report to provide customer confirming the accuracy of the score. The home energy assessor must copy Earth Advantage in correspondence with homeowner with QA re-score. If not copied, Earth Advantage reserves the right to follow-up with the home owner directly to confirm the resolution.

Trigger: Earth Advantage / US DOE QA screening determines potential scoring error

Resolution steps:

Step 1: If Earth Advantage or US DOE identifies errors during data screening, Earth Advantage instructs home energy assessor to correct the home energy score or take other corrective action in writing.

Step 2: The home energy assessor must copy Earth Advantage in correspondence of resolution with homeowner, including correspondence with a corrected home energy score. If not copied, Earth Advantage reserves the right to follow-up with the home owner directly to confirm the resolution.

Trigger: Earth Advantage / US DOE QA screening determines pattern of potential scoring errors

Resolution steps:

Step 1: If Earth Advantage or US DOE identifies errors during data screening, Earth Advantage instructs home energy assessor to correct the home energy score or take other corrective action in writing. Corrective action may include re-training and must be completed before the home energy assessor can produce home energy scores for more homes.

Step 2: The home energy assessor must copy Earth Advantage in correspondence of resolution with homeowner, including correspondence with a corrected home energy score. If not copied, Earth Advantage reserves the right to follow-up with the home owner directly to confirm the resolution.

To: Authorized City of Portland Home Energy Assessors
From: MacKenzie Winchel, Earth Advantage
Date: 12/20/2017

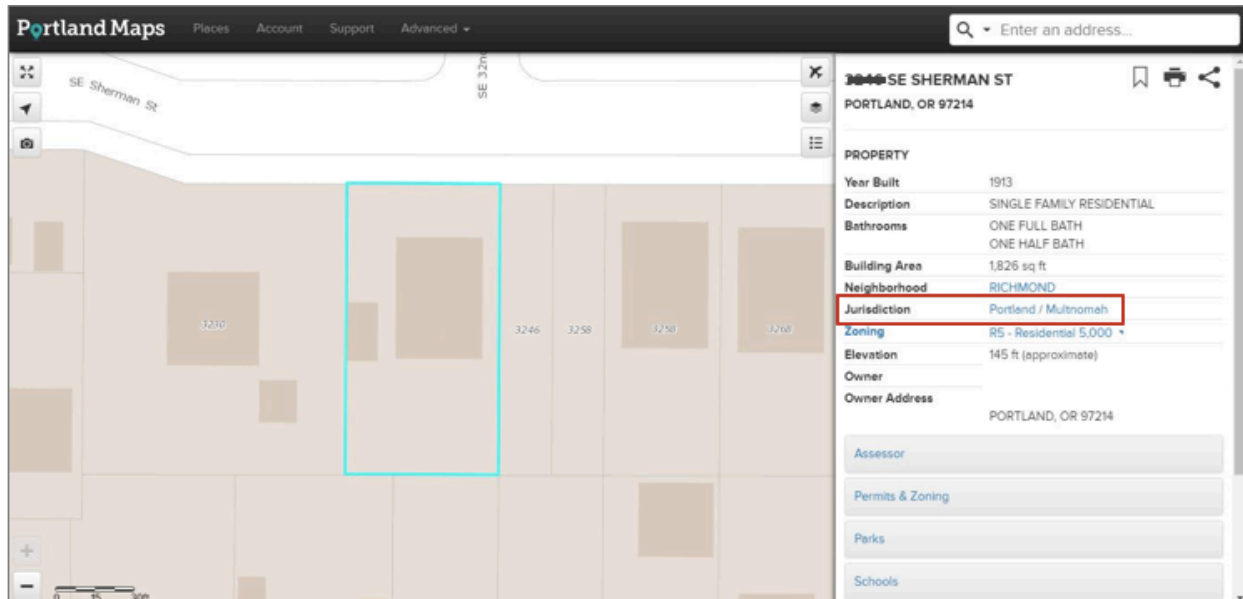
Protocol for Claiming Addresses in Green Building Registry

The process of “claiming” addresses in Green Building Registry ensures that only one assessor at a time is able to generate a City of Portland Home Energy Report for any given home. After discussions with a number of recently authorized City of Portland Home Energy Assessors, Earth Advantage has clarified and formalized the process for “claiming” addresses as part of use of the Green Building Registry. The intent of an address “claiming” protocol is to help support a positive customer experience with the City of Portland Home Energy Score program and to ensure that the assessor’s use of the Green Building Registry is as efficient as possible.

The following protocol will go into effect as of 12/20/2017:

- If the assessment is being done using an on-line tool, addresses should be claimed by the assessor only when that assessor has **physically arrived at the property and has gained access to the home to begin the assessment.**
 - Addresses **should not** be claimed prior to the assessor physically arriving at the property where the assessment will be conducted.
- If the assessment is being done off-line using the paper [Home Energy Score Data Collection Form](#), the address can be claimed in Green Building Registry **after the physical assessment has been completed** and the assessor is back on-line.
- A claimed address will remain claimed for 24 hours.

An assessor can confirm an address is within the Portland jurisdictional boundary at any time prior to the assessment by visiting portlandmaps.com and look up the site address for the property in question. The “Jurisdiction” field can be found in the Property details. See example below:



If an assessor who has **physically arrived at the property and has gained access to the home** determines that an address has for some reason already been claimed, that assessor should report this issue immediately to Earth Advantage at (503) 468-3482 and/or pdxhes@earthadvantage.org. Earth Advantage staff will review which assessor has erroneously claimed the address and take appropriate action.

Non-compliance with Claiming Protocol

The following statement describing the penalty for non-compliance with the Claiming Protocol has been added to the City of Portland Home Energy Score Quality Assurance Protocol:

Part 7: Maintaining authorized home energy assessor status:

Any home energy assessor participating in the City of Portland Home Energy Score program may have their authorization suspended or removed in any of the following circumstances:

- Inappropriate claiming of addresses in the Green Building Registry.