



Roadmap: Becoming an Authorized Portland Home Energy Score Program Assessor



Outlined below are the **required** steps to become an authorized home energy assessor with the Portland Home Energy Score program. This entire process is estimated to take a minimum of four weeks and \$625 to complete. To complete the process, you must hold an Oregon CCB license for residential contractor, residential specialty contractor license, or residential restricted Home Energy Performance Score Contractor.

STEP 1: Obtain and verify qualifying credentials.

STEP 2: Complete Home Energy Score Simulation training.

STEP 3: Obtain and verify home energy assessor CCB certificate.

STEP 4: Complete the home energy assessor participation agreement.

STEP 5: Attend mandatory orientation.

STEP 6: (Optional) Obtain Pre-Construction assessor designation.

STEP 7: Successfully complete required mentoring session.

STEP 8: Authorization.

STEP 1: Complete at least one of the following US Department of Energy (US DOE) qualifying credentials listed on the ODOE - Home Energy Assessor Training Certification Form (found [HERE](#)). **Please email the form and direct questions about completing credentials to ODOE.HEPS@oregon.gov.**

Note: If you have yet to complete the US DOE Home Energy Score Simulation Training, disregard the "US DOE online simulation training" field on the form.

Estimated cost: varies by market rates

Estimated time frame: varies by training provider

STEP 2: US DOE will email you access to the Simulation Training. This is a self-paced training process where **you will conduct virtual home walk throughs designed to show a variety of situations you might encounter**, in order to learn how to produce an accurate Home Energy Score. Once complete, US DOE will email you to confirm you passed a series of test homes and a multiple choice exam.

Estimated cost: Free (unguided)

Estimated time frame: 12+ hours, usually over a few weeks

STEP 3: Submit approved and completed Home Energy Assessor Training Certification Form from Step 1 to CCB, **WITH the [CCB Home Energy Assessor Certification Application](#) AND your CCB license application, unless you are associating with a pre-existing license.** Upon approval, CCB will mail you a certificate and CCB number.

Email certificate and CCB number to: PDXHES@earthadvantage.org

Ways to submit applications to CCB: Fax or regular mail only. For security reasons, applications are not accepted by email.

Please direct CCB questions to: laurie.hall@ccb.state.or.us

Note: Your Home Energy Assessor certification cannot be issued without a CCB residential general contractor license, residential specialty contractor license, or residential restricted Home Energy Performance Score Contractor license – see [CCB Endorsements](#) for descriptions.

Estimated cost: \$100 Application Fee + \$100 One-Year Certification Fee. Ongoing annual renewal fee is \$100.

Estimated time frame: 5 - 7 business days

STEP 4: Complete the home energy assessor participation agreement (Download form [HERE](#)). **Submit agreement to Earth Advantage – at PDXHES@earthadvantage.org**

Estimated cost: None

Estimated time frame: 2 - 4 business days to process

Turn over for more details on steps to become an authorized home energy assessor with the Portland Home Energy Score program >>

Version: 2019.03.12

STEP 5: Attend mandatory orientation. Learn about specific local program requirements and messaging to homeowners about the Home Energy Report. Click [HERE](#) to find the next assessor orientation and sign up.

Estimated cost: \$75

Estimated time frame: 2 hr Orientation session

STEP 6: (Optional) Obtain Pre-Construction assessor designation. This training is intended for assessors that will be scoring new homes before construction is complete. Learn protocol to do a Pre-Construction assessment via floor plans. Click [HERE](#) to register for this online on-demand training.

Estimated cost: Free

Estimated time frame: 1 - 2 hours

STEP 7: As required by US DOE, **you must schedule and score your first home accompanied by a mentor designated by Earth Advantage.** Click [HERE](#) to find the next assessor mentoring session and sign up.

Estimated cost: \$100

Estimated time frame: 2 hr field visit + 2 hr data entry and energy modeling

STEP 8: You are now authorized to conduct City of Portland Home Energy Score assessments and generate the Home Energy Report! Earth Advantage will send you an authorization email to confirm.

Estimated cost: \$25/score quality assurance fee

Estimated time frame: 1.5 hr/home - field assessment, energy modeling, Portland home energy report generation

Program Entity Roles

- **US Department of Energy (US DOE)** – Manages the Home Energy Score rating protocol, training requirements and quality assurance guidelines.
- **Oregon Department of Energy (ODOE)** – Manages compliance to Oregon-specific Home Energy Performance Scores requirements – Training credentials, CCB licensing, scorecard utility rates.
- **City of Portland, Bureau of Planning & Sustainability** – Manages the Portland Home Energy Score program and is the official Home Energy Score Partner to US DOE.
- **Earth Advantage** – Implements program quality assurance on behalf of the City of Portland.

Home Energy Score Modeling Tools:

Beyond use of the US DOE Home Energy Score modeling tool, a number of other third-party software providers have successfully integrated with the Home Energy Score API to allow Assessors to produce the Home Energy Score Report along with the other outputs the software produces.

Click [HERE](#) and scroll to see the current list of approved third-party software providers available for the Portland program. Licensing may be required between the Assessor and software provider.

Estimated cost: Varies.

US DOE's Home Energy Score software tool is free.

Other third-party software providers may charge licensing fees for use.

For More Information:

If you have further questions related to becoming an authorized home energy assessor for the Portland Home Energy Score program, please contact:

Mackenzie Winchel, Program Manager / Quality Assurance Provider

PDXHES@earthadvantage.org

(503) 468-3482