



Roadmap: Becoming an Authorized Oregon Home Energy Score Program Assessor

Outlined below are the **required** steps to become an authorized home energy assessor with the Oregon 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.** If you are already have an active HES Assessor ID you can contact Earth Advantage to get more details on needed steps.

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: Successfully complete required mentoring session

STEP 7: 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 walkthroughs 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. 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

Upon approval, CCB will mail you a certificate and CCB number.

Upon receipt, email certificate and CCB number to Earth Advantage: oregonhes@earthadvantage.org

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. Annual renewal fee \$100.

Estimated time frame: 5 - 7 business days

STEP 4: Complete the home energy assessor participation agreement (Download at: earthadvantage.org/orhes.html). Submit agreement to Earth Advantage – at: oregonhes@earthadvantage.org

Estimated cost: *None*

Estimated time frame: *2 - 4 business days to process*

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. Assessors operating outside of Portland Metro will also get training related to Remote QA requirements.

Estimated cost: *None*

Estimated time frame: *1-2 hr Orientation session*

STEP 6: As required by US DOE, you must schedule mentoring designated by Earth Advantage.

1. If you will be conducting Home Energy Scores *inside* the Portland Metro area, register for in-field mentoring of your first Home Energy Score. Please find more information and registration [HERE](#).

Estimated cost: \$150 (Travel costs may be added for areas outside of PDX Metro)

Estimated time frame: 2 hr field visit + 1 hr data entry and energy modeling

2. If you will be conducting Home Energy Scores *outside* the Portland Metro area and are unable to attend an in-field mentoring, register for remote mentoring. Please find more information and registration [HERE](#)

Estimated Cost: \$150

Estimated time frame: 1.5 hr field visit + 1 hr data entry + 1 hour remote mentoring session.

STEP 7: You are now authorized to conduct ODOE Energy Score assessments and generate the Home Energy Report! Earth Advantage will send you an authorization email to confirm.

1. Inside Portland Metro area: (In Field QA): This is the QA process for HES scores conducted within the Portland Metro area (see the [Oregon Home Energy Score Quality Assurance Protocol](#) for geographic qualifications)

Estimated cost: \$25/score quality assurance fee

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

2. Outside Portland Metro area (Remote QA)

Estimated cost: \$25/score quality assurance fee

Estimated time frame: 1.5 hr/home - field assessment, energy modeling, Oregon home energy report generation, Remote QA Photo Systems.

HES Scores conducted outside of PDX Metro operate under the Remote QA process. During orientation you will learn more about those requirement and relevant steps for your area. A Remote QA Form is required to be filled out for every HES assessment conducted and will be submitted to the QA Team.

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. Manages the ODOE program and is the official Home Energy Score Partner to US DOE.

Earth Advantage

Implements program quality assurance on behalf of the Oregon Department of Energy.

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 Oregon program. Licensing may be required between the Assessor and software provider.

Estimated software costs

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 ODOE Home Energy Score program, please contact: oregonhes@earthadvantage.org