

Home (1-4 Units) Energy Assessor Quick Guide Building Energy Saving Ordinance (BESO)

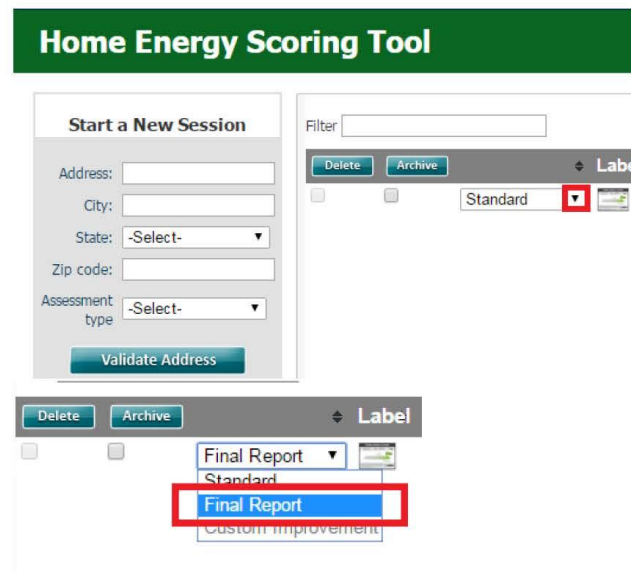
1. [Refer to Assessment Requirements Chart](#): This chart summarizes all Energy Assessment and Assessor qualification requirements for all building types. Available in Appendix D of the [BESO Administrative Regulations](#).
2. Check the [Property Status List](#) available on the [BESO website](#) for compliance status of building.
3. Verify requirements for building:
 - a. *Is an assessment required?* Not if the building or unit is less than 600 sf or less than 10 years old
 - b. *Is the building eligible for Home Energy Score?* Only if it is a single detached structure or a side-by-side townhome style
4. Complete appropriate assessment:
 - a. For Home Energy Score reports:
 - i. Use HEScore software to create PDF report. Make sure to exclude second score. For specific instructions, see attached instructions or contact homeenergyscore@bki.com.
 - ii. Complete all fields of the supplemental Recommendations Sheet. For a copy of this file, please email beso@cityofberkeley.info.
 - iii. Upload assessment to private Dropbox folder shared with BKi and await approval before sending to the City or client. Follow any correction instructions given by BKi, if needed. For access to Dropbox, please email homeenergyscore@bki.com.
 - b. For SnuggPro & Optimiser users ONLY:
 - i. The Home Energy Score should be a one-page output within your report. If using Optimiser, you may include the second score with recommendations. If using SnuggPro, please continue to omit second score using attached instructions or contact homeenergyscore@bki.com.
 - ii. In available space within the report, include client contact information, including name, email, phone number, and label (buyer, seller, agent).
 - iii. In available space within the report, identify whether assessment is advanced or basic.
 - iv. Upload assessment to private Dropbox folder shared with BKi and await approval before sending to the City or client. Follow any correction instructions given by BKi, if needed. For access to Dropbox, please email homeenergyscore@bki.com.
 - v. Include paid, itemized invoice.
5. Reporting to the City: Reporting to the City: Please note compliance will not be complete without the Energy Report, [BESO application](#), and associated filing fee (the latter two may be completed by either the building owner or assessor). When submitting an Energy Assessment, please attach all of the following in an email to building owner, and cc beso@cityofberkeley.info:
 - Energy Assessment (PDF)
 - Supplemental Recommendations Sheet (PDF) (*unless using Optimizer*)
 - Invoice (*if needed, please include when using Optimizer*)

How to generate a Home Energy Score Report without recommendations

1. After creating a Score, return to the Dashboard by clicking "Back to Dashboard"



2. Once you are on your dashboard, click on dropdown menu next to the address you need the report without recommendation for and select "Final Report"



3. Finally, click on the report icon, which will launch the Score Report without Recommendations.

