HOME ENERGY ASSESSMENT / 01

MAP THE ASSESSMENT GOALS

Describe observations and context without diagnosing causes or exposing private property information.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Property A / broad type / approximate age band / no address

Area A / comfort pattern or energy concern / when observed

Available bill or usage information category / date range only

System or equipment category / known recent change / no serials

Occupancy or schedule pattern category / no person details

Desired outcome / report question / priority for comparison

HOME ENERGY ASSESSMENT / 02

DEFINE ACTIVITIES AND OUTPUTS

Let each provider describe appropriate methods, preparation, limits and deliverables for the shared goals.

Proposed assessment activities / purpose / provider explanation

Requested access and preparation / private details shared later

Observation, measurement or data categories / handling approach

Known limitation, inaccessible area or assumption / report treatment

Report format / images or data / plain-language discussion

Follow-up conversation / unresolved question / next-step boundary

Preparation only. Confirm scope and terms with the professional.

HOME ENERGY ASSESSMENT / 03

CHECK THE ASSESSMENT HANDOFF

Tick what is organized. These checks do not approve a method, diagnose a condition or promise savings.

- [ ] The same property and goals brief will go to every provider
- [ ] Observations are separated from unverified causes
- [ ] Address, access and account details remain private
- [ ] Each provider defines proposed activities and preparation
- [ ] Measurements, assumptions and limitations will be documented
- [ ] Report format and follow-up are described
- [ ] Savings, eligibility and upgrade decisions remain unresolved
- [ ] Optional work and specialist referrals are separated

Scheduling and authorized access contact / neutral role label

Deliverable acceptance / follow-up contact / question window

Open safety, program, code or specialist question / owner

Preparation only. Confirm scope and terms with the professional.

HOME ENERGY ASSESSMENT / 04

QUESTIONS FOR THE ENERGY ASSESSOR

Record the provider's answer and where it appears in the proposal or assessment plan.

Approach: what activities do you propose for these goals, and why?

Access: what preparation and available records would you request?

Evidence: how are observations, measurements and limits documented?

Deliverable: what report, images or data will we receive?

Discussion: how will findings and next questions be explained?

Terms: what is included, optional, excluded and available afterward?

Preparation only. Confirm scope and terms with the professional.

HOME ENERGY ASSESSMENT / 05

COMPARE THE SAME PROPERTY BRIEF

Use Provider A and B. Clarify unlike methods, deliverables or assumptions before comparing proposals.

Provider A / B / consultation dates / shared Property A brief

Proposed activities, access and preparation - A / B

Documentation, limitations, report and follow-up - A / B

Included, optional and excluded work / next-step boundary - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start an Energy Assessments request. Share a non-sensitive property, goals and deliverables brief so participating pros can compete with proposals. Compare proposed activities, access, documentation, limitations, report format, follow-up, exclusions and fit. Never include an address, access code, utility account or occupant identity in the request.

One request. Every pro's best offer.

Start a request

Participation varies. A planning conversation may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/energy-assessments

U.S. Department of Energy: Consumer Guide to Home Energy Assessments (official reference)

U.S. Department of Energy: Home Energy Score (official reference)