



# Snugg Pro Contractor Guide

FUNDING A CLEAN ENERGY FUTURE FOR FRONTLINE  
COMMUNITIES

VERSION 20250121

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## DOCUMENT OVERVIEW

Energy Friendly Homes Program participating contractors will use Snugg Pro to complete home energy assessments, develop scopes of work, model energy savings, and submit projects to Quality Assurance Provider (QAP) for approval. This guide is intended for participating contractors needing guidance on using Snugg Pro for their projects.

## QUALITY ASSURANCE (QA) PROCESS

The assigned project Energy Specialist will introduce the contractor to the assigned QA Provider who will be responsible for evaluating and approving the scope of work and final installation.

Refer to the [Contractor Handbook](#) to review the Quality Assurance Process.

## SNUGG PRO TRAINING & SUPPORT RESOURCES

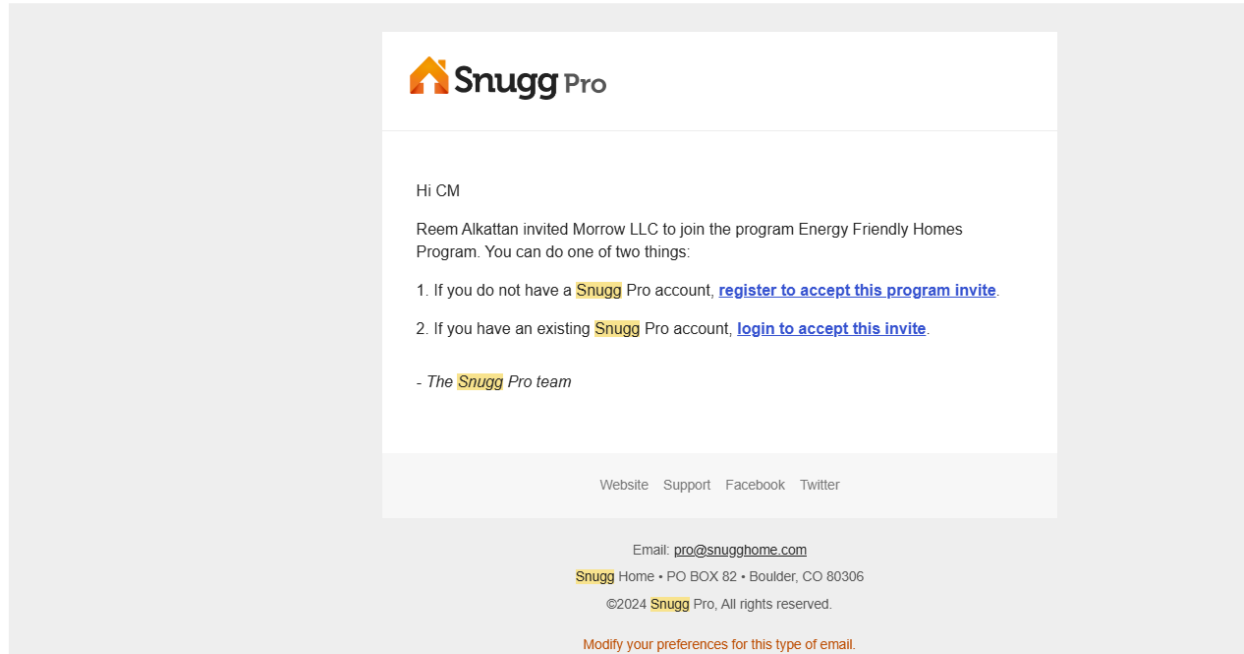
- Snugg Pro Training Videos:
  - <https://snuggpro.com/webinars/training>
  - Training series eligible for BPI CEUs
- Earth Advantage Snugg Pro Webinar:
  - [Webinar recording](#)
  - [Webinar slides](#)
- Snugg Pro Support:
  - <https://snuggpro.com/support-section>
  - [Pro@snugghome.com](mailto:Pro@snugghome.com)
- Energy Friendly Homes [Eligible Measures](#)
- [PCEF Installation Checklists](#)
- Energy Friendly Homes [QA Support](#)

## SNUGG PRO STARTUP

1. The BPI Professional contractor will receive a Snugg Pro invitation from "Snugg Pro Support" to access the program. The invite is sent by the program team. The contractor has 30 days to accept the invitation. The recommendation is to accept the invitation as soon as it is received.

Snugg Pro Support <pro@snuggpro.com>  
to me ▾

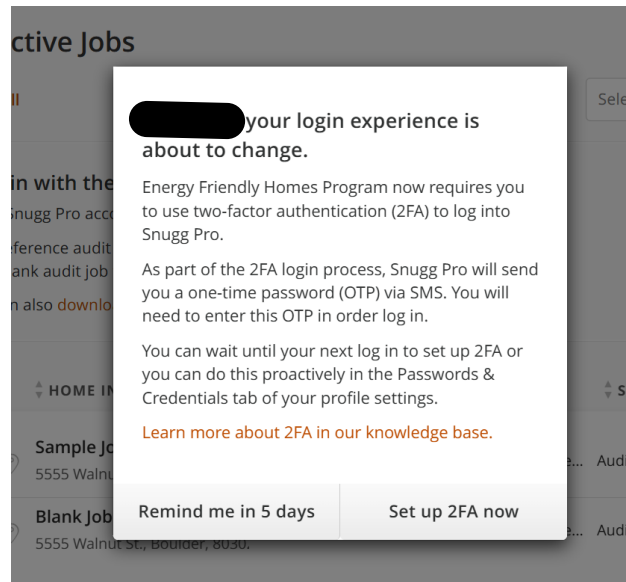
2:11PM (0 minutes ago)



2. After accepting the invitation, if the contractor does not have an existing Snugg Pro account, it will ask to create a password.

The screenshot shows the "Create a new company" registration form on the Snugg Pro website. At the top is the Snugg Pro logo. Below the logo is the heading "Create a new company" and a question "Did you mean to [log in as an existing user](#) ?". The form contains four input fields: "New company name", "First name", "Last name", and "Email". Each of the first three fields has a black redaction mark over the text entered. The "Email" field is empty.

3. You are required to use two factor authentication while using Snugg Pro



4. After completing all registration steps, the contractor will have access to create jobs within the Energy Friendly Homes Program.
5. Contractors can invite members of their internal team who are working on Energy Friendly Homes projects.
  - a. Members can also be admin staff who help with the day-to-day support of projects
  - b. At least one member must be a BA-Professional who is responsible for the project assessment, modeling and scope development. This member may be the contractor, a member of their staff or a subcontractor.
6. There are **NO FEES** to contractors when creating new jobs.

**NOTE:** Contractors will only have access to jobs for programs that they are associated with, If a contractor is associated with multiple PCEF-funded programs, it is very important to ensure that they are creating jobs in the **correct program**.

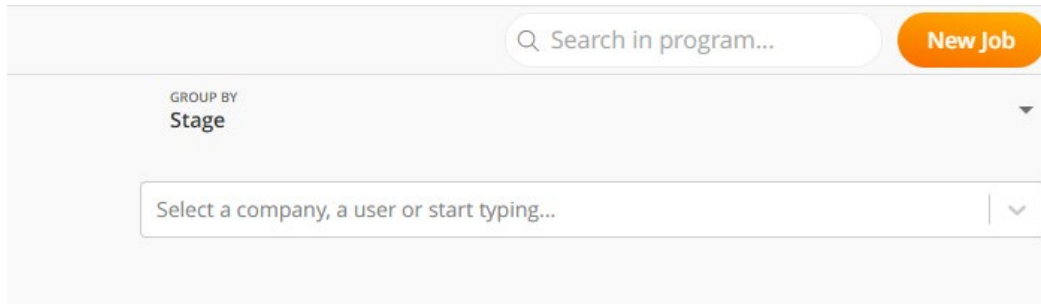
## STEP- BY- STEP HOME RETROFIT PROCESS

### 1. COMPLETE ENERGY ASSESSMENT

- A BPI Building Analyst Professional schedules and performs the energy assessment and communicates the scheduled time with the program team including the Client Navigator, Energy Specialist, and Project Coordinator.
- Contractors communicates what to expect during the assessment and retrofit process with the household. After completing the assessment, the BPI Professional logs the findings in Snugg Pro, described in detail below.

## 1.1 CREATING A JOB

To create a job, click “Jobs” in the upper left-hand corner. Then, in the upper right-hand corner, click “New Job”.



On the “Create a Job” page, populate required fields in Job Details, Customer Contact Info, Property Address, and Additional Information.

- Select Program: “Energy Friendly Homes Program”.
  - *Note: If you neglect to select the program, you will not be able to select it after creating the job.*
- Company Name: Enter your company name
- For the stage, click “Audit”
- For Template, select “Energy Friendly Homes **Template**”

**1. Job Details**

**Program:**  
Energy Friendly Homes Program

**Company:**  
Capital R Construction

**Assign To Account:**  
Reem Alkattan

**Note To Assignee:**

**Stage:**  
Audit

**Start With:**

**Template**  
Energy Friendly Homes Template

- Enter the address and client details

**3. Property Address**

**Address 1**  
1234 N CFM50 St

**Address 2**  
Apt or unit # if any

**City**                      **State**                      **Zip**  
Portland                      OR                      97203

**Rent or Own**                      **Household Income**  
Renter                         Any

- For Strict BPI-2400 Calibration, most projects will want to select "No".

- (Note: a “Yes” response requires user to input utility bills. BPI-2400 calibration is required for projects that plan to obtain funding through the HOMES program, but not through PCEF.)

**4. Additional Information**

Alternate Job Id

Use Strict BPI-2400 Calibration

Yes  No

[About BPI-2400 calibration](#)

[Review on next step >](#)

## 1.2 INPUT STAGE

Use “Input” stage to log audit findings. Contractors must enter all known data at the “Input” stage, including areas like attic, crawl space, windows areas, R-Values, equipment efficiency ratings. If you can’t collect certain data points (e.g., closed cavity vaulted attic, inaccessible wall cavity), you may use the defaults from Snugg Pro. Refine these inputs in the Refine section when making recommendations as part of the scope of work.

To log audit data/findings, click “Input” on the left sidebar. Refer to the table below that outlines all the required data entry for the Energy Friendly Homes Program.

The screenshot shows the 'Input' screen for a building in the Snugg Pro software. The left sidebar lists various components that can be input, including Concerns, Utility Bills, Thermostat, HVAC, Appliances, Refrigerators, Lighting, Doors, Walls, Attic, Foundation, Windows, Air Leakage, Hot Water (DHW), Pools, PV, Misc Electric Loads, Health & Safety, and CAZ. The main area is titled 'Building' and contains several input fields: Year Built (with a '#' symbol), Conditioned Area (with a 'ft²' symbol), Area Includes Basement (with 'Yes' and 'No' radio buttons), Average Wall Height (with a 'ft' symbol), House Length (with a 'ft' symbol), House Width (with a 'ft' symbol), Floors Above Grade (with a '#' symbol), Number of Occupants (with a '#' symbol), and Number of Bedrooms.

For components that you upgrade, enter all actual pre- and post- data on both the **Input Screen** and **Now and Goals** sections. The most accurate modeling will be produced by entering actual pre- and post- measurements or ratings for each of the following components. Then **Model** the job to review the preliminary savings before any recommendations are added.

Tip: Snugg Pro's [Energy Audit Field Sheet](#) is helpful for data collection.

Refer to the table on the following two pages for guidance to populate findings in Snugg Pro.

Measure	Energy Friendly Homes Guidance
<b>Building</b>	Enter all building data points. Shielding is optional.
<b>Concerns</b>	Interview home occupants and identify their main concerns. Detail concerns in the report.
<b>Utility Bills</b>	<ul style="list-style-type: none"> <li>Entering actual utility bill data will provide the most accurate fuel usage and savings estimates for the customer.</li> <li>If you do have access to utility bills, enter the monthly data and run the basic calibration.</li> </ul>

Measure	Energy Friendly Homes Guidance
	<ul style="list-style-type: none"> <li>• BPI-2400 is the most restrictive utility bill calibration and is only needed if you are working with the HOMES program.</li> <li>• Utility bill calibration is currently optional for PCEF projects.</li> </ul>
<b>Thermostat</b>	Do not adjust the thermostat setting.
<b>HVAC</b>	<ul style="list-style-type: none"> <li>• Enter HVAC type, fuel and distribution details for each HVAC system.</li> <li>• Enter the % of the conditioned area served by each system, not to exceed 100% total.</li> <li>• Enter actual system efficiency ratings (AFUE, SEER, HSPF). Find system specifications by looking up the model number on the manufacturer’s website, distributor’s documents or <a href="#">AHRI directory</a>, or refer to efficiency ratings are on the Energy Guide adhered to the unit.</li> <li>• Specify if gas or propane HVAC systems are condensing by clicking on the system type.</li> <li>• If efficiency ratings are unavailable, enter the system type and use Snugg Pro’s auto default.</li> </ul>
<b>Ducts</b>	<ul style="list-style-type: none"> <li>• Enter duct location for central, ducted distribution systems. Otherwise, SnuggPro will default to attic only.</li> <li>• Record measured CFM from duct blaster test or estimated percentage leakage from pressure pan tests. Upload list of pressure pan readings at each register If the pressure pan test option was selected.</li> </ul>
<b>Appliances</b>	<p>Enter oven and range fuel type, dryer fuel type, and whether or not there is a dishwasher.</p> <p>Enter clothes washer type and whether it is Energy Star rated.</p> <p>Enter refrigerator size and whether it is Energy Star rated.</p>
<b>Lighting</b>	<ul style="list-style-type: none"> <li>• Enter percentage of CFL and LED bulbs.</li> </ul>
<b>Doors</b>	<ul style="list-style-type: none"> <li>• Enter the type for each exterior door.</li> </ul>
<b>Walls</b>	<ul style="list-style-type: none"> <li>• Enter the length and width of home, # of stories, and average ceiling height of each building section. Snugg Pro will auto calculate the wall area.</li> <li>• Enter existing wall insulation levels, framing type and other wall details. There is an option to refine the wall area sq ft in the recommendation or Now and Goal sections.</li> </ul>
<b>Attic</b>	<ul style="list-style-type: none"> <li>• Complete attic type and R-value on Input Screen for each attic section.</li> <li>• If there are two or more attics, indicate the % of each, not to exceed 100%.</li> <li>• Enter attic kneewall and vault details in the <i>Attic</i> and <i>Vault Now and Goal</i> section.</li> </ul>

Measure	Energy Friendly Homes Guidance
	<ul style="list-style-type: none"> <li>• There is an option to refine the attic details, such as attic areas and R values in the Now and Goal refine phase. There is an option to enter knee wall sections and make upgrade recommendations in the refine details.</li> </ul>
<b>Foundation (includes rim joists, crawlspaces?)</b>	<ul style="list-style-type: none"> <li>• Enter the % of each foundation type, not exceed 100% total.</li> <li>• Select the correct base and improved foundation type otherwise SnuggPro will default to unvented crawl.</li> <li>• Update area, R values and other details for each area in the Now and Goal section. Tip: To enter rim joists, click the basement refine button and select Separately under Basement Rim Joist Treatment. Continuous insulation refers to exterior foam board added to new home construction.</li> </ul>
<b>Windows</b>	<p>Enter frame and window type. If the home has multiple window types, enter the two highest percentage window types.</p> <p>Measure window and determine total sq ft on each side of the home.</p> <p>In the input section, enter the percentage of window area on each side of the home. For the most accurate modeling, complete the next step in refine.</p> <p>In the refine section, enter actual sq ft of windows on each side of home. This step is <u>required when recommending window upgrades</u>, and the information will be necessary for creating heating &amp; cooling load calcs.</p> <p>Tip: A standard sliding glass door is about 40 sf and should be counted in the total window area for that side of the home.</p> <p>Tip: Examples of overhang are eaves, soffits.</p>
<b>Air leakage</b>	<p>The Snugg Pro default often overestimates air leakage measurements for our region. If upgrading any part of the envelope, you must conduct a blower door test during the initial audit when any part of the home envelope is upgraded.</p> <p>If a blower door test cannot be run when a unique scenario exists (e.g., friable asbestos, mold, no access, missing drywall) the default may be used along with the following:</p> <ul style="list-style-type: none"> <li>Input utility bill data when possible, to improve the modeling accuracy.</li> <li>Run post-remediation test prior to beginning weatherization work to determine the baseline air leakage.</li> </ul> <p>If the retrofit included air sealing, re-test and enter the post-retrofit air leakage test results in the air sealing Refine details.</p>
<b>Hot water</b>	<p>Enter water heater type, fuel type, size and location.</p> <p>Enter efficiency factor (EF or UEF).</p> <p>System specifications can be found on the manufacturer website, distributor spec sheets or the <a href="#">AHRI directory</a>.</p>

Measure	Energy Friendly Homes Guidance
	<p>If specifications are unavailable, the SnuggPro defaults may be used.</p> <p>All water heater details are required when a water heater is upgraded.</p> <p>Enter the correct replacement system type. Note that if the existing system is gas, SnuggPro will default to a gas tankless recommendation which is not eligible for PCEF funding.</p>
<b>Pools</b>	<ul style="list-style-type: none"> <li>Complete relevant data if the home has a pool or hot tub.</li> </ul>
<b>PV</b>	<p>Enter Solar PV system data (i.e., Size (kw), orientation, tilt, year installed, shading details).</p> <p>Request these details from the homeowner documentation or from the electric permit.</p>
<b>Misc electric data</b>	<p>Enter EV charger, when applicable.</p> <p>Enter total amperage of electrical panel and available breakers. This is important if heat pump upgrades are recommended and required for panel replacements.</p>
<b>Health and safety</b>	<p>Enter all relevant Health &amp; Safety details.</p> <p>If diagnostic testing was not performed, select "Not Tested"</p> <p>If a safety test fails or an unsafe condition exists, select "Failed".</p> <p>If the condition is concerning, select "Warning".</p> <p>Any health and Safety issue identified should be addressed in the recommendations.</p> <p>Provide details in the notes about what needs to be addressed or has failed.</p> <p>Provide combustion safety test results for any remaining combustion appliances.</p>
<b>CAZ</b>	<p>Combustion Appliance Zone (CAZ) testing is required when combustion appliances are present in the home. Provide details of any failed diagnostic tests in the notes section.</p>

## 2. DEVELOP SCOPE OF WORK

### 2.1 REFINE STAGE

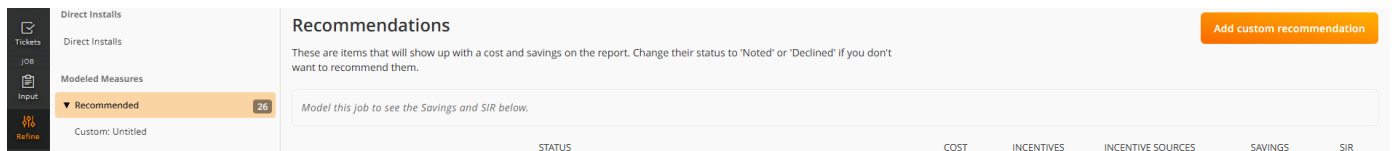
After entering the basic inputs, click on “model it” to model the job to generate cost and savings estimates. You can model a job as many times as necessary.

Develop project scope recommendations in accordance with the [Energy Friendly Homes Program Eligible Measures](#). Contractors may use [PCEF Installation Checklists](#), or other specification manuals and field guides if they meet or exceed the standards on [PCEF Installation Checklists](#), including:

- [NREL Standard Work Specifications](#)
- [Energy Trust of Oregon – Specifications Manual](#)
- [Low Income Weatherization Assistance Program - Field Guide & Standards](#)

To enter scope of work recommendations, click **Refine** on the left sidebar.

To add custom recommendations, click the orange **Add custom recommendation** button in upper right corner.



Select one of three options for each measure:

- **“Recommend”** if you would like to recommend an upgrade.
- **“Note”** if you would like to flag as a consideration for *future* work.
- **“Decline”** if you do NOT recommend an upgrade for this measure.

### 2.2 MEASURES, INCENTIVES AND COSTS

There are four (4) types of costs that need to be entered into Snugg Pro before you can submit your work order:

- **Energy saving measures and costs**
- **Energy Trust of Oregon incentives**
- **Critical repair measures and costs**
- **Contingency costs**

## 2.2.1 ENERGY SAVING MEASURES RECOMMENDATIONS

### Energy Saving Measure Exceptions:

Custom measures are typically critical repairs that fall into the 30% non-energy saving project budget allowance. But according to the PCEF Eligible Measures some may be included in the 70% energy saving project budget (e.g. radon test, electrical panel upgrade, one time pest extermination.) It is always good practice to review the list of Eligible Measures while building your scope of work.

For each recommended **energy saving measure**, click the row to detail the scope. The measure refine window will open.

-----

These are items that will show up with a cost and savings on the report. Change their status to them.

This job has unmodeled changes and may not be accurate. Please model it for best results.

	STATUS
<input type="checkbox"/> Upgrade Heating System Heating System	<input type="button" value="Recommend"/> <input type="button" value="Note"/> <input type="button" value="Decline"/>
<input type="checkbox"/> Upgrade Cooling System Cooling System	<input type="button" value="Recommend"/> <input type="button" value="Note"/> <input type="button" value="Decline"/>
<input type="checkbox"/> Insulate Attic Attic	<input type="button" value="Recommend"/> <input type="button" value="Note"/> <input type="button" value="Decline"/>
<input type="checkbox"/> Insulate Vault Vaulted Ceiling	<input type="button" value="Recommend"/> <input type="button" value="Note"/> <input type="button" value="Decline"/>
<input type="checkbox"/> Insulate Crawl Space Crawl Space	<input type="button" value="Recommend"/> <input type="button" value="Note"/> <input type="button" value="Decline"/>
<input type="checkbox"/> Seal Air Leaks	<input type="button" value="Recommend"/> <input type="button" value="Note"/> <input type="button" value="Decline"/>

Provide detailed line-item pricing for each component of the measure:

- Adjust the Title, if you would like.
- To enter costs, select **“Detailed”** and click **“Add a line item”**.

Heating System

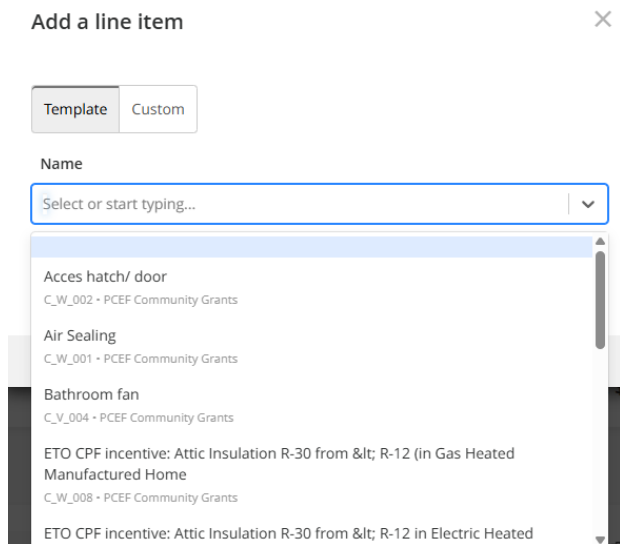
Title

Upgrade Heating System  
Suggested title: Upgrade Heating System | 32 chars max. 10 left.

Costs

Total: \$ 0

A popup will appear. Select **“Template”** and then click on the dropdown list arrow.



Select the components included in that recommended measure.

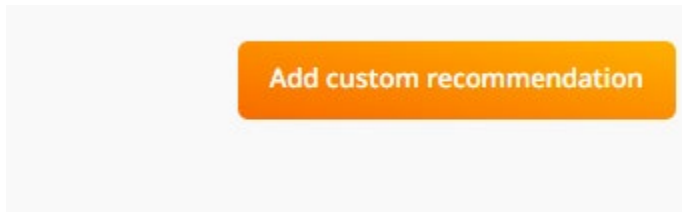
- Complete the "Cost" and "Quantity" details and click "Confirm" to exit.
- You can change quantity unit type by clicking "Optional Fields"

To finalize the scope,

- Add photos from project audit.
- Add notes to homeowner if desired.
- Populate the Base and Improved fields under each recommendation.
- For scopes that require blower door testing, change BASE entry from "Estimate" to "Tested".

To add an energy saving measure that is not listed in Snugg Pro as an energy saving improvement measure, you should add them as a custom recommendation.

- Click on "Add Custom Recommendation"



- Under the "Program Measure Code dropdown, click on "Energy Saving Improvement"

Program Measure Code

Energy Savings Improvement

- Asbestos remediation
- Electrical hazard mitigation
- Electrical panel upgrade
- Energy Savings Improvement**
- Exhaust ventilation and/or venting
- Gutter repair or replacement
- Knob & tube wiring mitigation
- Mold mitigation
- Oil tank decommissioning
- Other: Please describe
- Pest control
- Radon mitigation
- Roof repair

- Under “Costs” click on “Detailed” and add a new line item
- Search for the measure in the template dropdown and add the cost

## 2.2.2 ENERGY TRUST OF OREGON INCENTIVES

Contractors should be applying for Energy Trust of Oregon incentives for all qualifying jobs. The incentives are built into Snugg Pro cost templates for the Energy Friendly Homes Program for your convenience. Work with your Energy Specialist for training on submitting to the Energy Trust for incentives for your projects.

After adding your list of recommendations and modeling the job, you can start to add incentives. Follow these steps:

**Step 1:** click on “Refine” and access the recommended measures that you modeled

**Step 2:** Click on a recommended measure. Under “costs” select “Detailed”.

**Step 3:** From the “template” dropdown menu, select the incentive associated with that measure. Each Energy Trust incentive begins with “ETO” and has a negative cost associated with it. This will be summed up in your Work Order to give you a total of the potential incentives on your project.

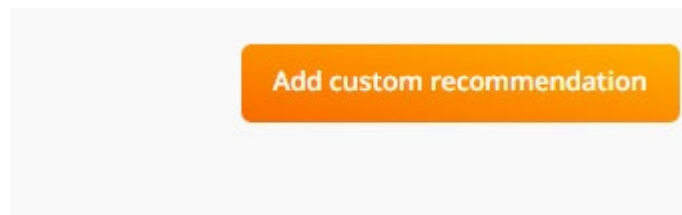
Costs Simple Detailed

DESCRIPTION	QTY	RATE	AMOUNT	
Heat Pump C_HC_001	1	\$ 6,000.00	\$ 6,000.00	
ETO CPF Incentive: Ext Capacity Heat Pump Displacing Gas C_HC_013 • Follow Energy Trust incentive requirements	1	\$ -2,000.00	\$ -2,000.00	
Add a line item				
			<b>Total: \$ 4,000.00</b>	

**Step 4:** After adding all applicable incentives, model the job again and review your work order report, you should notice a change in totals.

### 2.2.3 CRITICAL REPAIR MEASURES RECOMMENDATIONS

For each recommended **critical repair measure**, click on “add custom recommendation”



Name the custom recommended measure (e.g. radon mitigation). Then, choose a program measure through the dropdown. If it is not listed, click on “other”.

## Program Measure Code

Asbestos remediation  
Electrical hazard mitigation  
Electrical panel upgrade  
Exhaust ventilation and/or venting  
Gutter repair or replacement  
Knob & tube wiring mitigation  
Mold mitigation  
Oil tank decommissioning  
Other: Please describe  
Pest control  
Radon mitigation  
Roof repair

To enter costs, select **“Detailed”** and click **“Add a line item”**.

- Click on “custom” and add a title.
- Complete the “Cost” and “Quantity” details and click “Confirm” to exit.
- You can change quantity unit type by clicking “Optional Fields”.

To finalize the scope:

- Add photos from project audit.
- Add notes to homeowner if desired.
- Populate the Base and Improved fields under each recommendation.
- For scopes that require blower door testing, change BASE entry from “Estimate” to “Tested”.

## 2.2.4 CONTINGENCY COSTS

Contractors should build in 10% reserve into their SOW costs. This reserve is intended to cover unforeseen costs that arise during the installation of retrofit projects or

corrections identified in the quality assurance process, ensuring program continuity and fiscal responsibility.

Contingency reserves can be used **for unanticipated, eligible project expenses** that were not foreseeable at the time of project scoping or budgeting. Final project cost must adhere to 70/30 cost split requirements as outlined in the Eligible Measures.

- Change orders that exceed the maximum funding level for each Program Tier are not allowed; the program will never pay project costs above the maximum funding level for each Program Tier.
  - Tier 1 max = \$50,000
  - Tier 2 max = \$30,000
  - Tier 3, 4, 5 max = \$15,000

Choose the custom template for contingency costs and add your estimated cost.

**Add custom recommendation**

CONTINGENCY COST				\$ 5,000.00
CONTINGENCY COST	#CONTINGENCY_COST	1	job	\$ 5,000.00
<small>This amount is being held in reserve for contingencies or unforeseen costs. Change orders are not allowed. In no circumstances will the Energy Friendly Homes Program provide or approve payment or funding in excess of the maximum allowed funding for the Client's Tier, funding that exceeds the critical repair allowance, or funding in excess of 100% of the total project cost. Project costs must meet all other Program requirements.</small>				

**Note:** Change orders are not allowed and the Program will not provide or approve funding above the maximum allowable for the Client's eligibility Tier.

### 2.3 "MODEL IT" STAGE

## Model Project & Analyze Savings

Click "Model It" on the left sidebar.

Review modeling on the recommendations page, in upper right corner.

The project must show at least 10% savings in order to receive funds from PCEF.

Activity	Tickets	Alerts	Metrics	Export
Costs	Yr. Savings	Savings	SIR	MIRR
\$ 20,572.47	\$387	54%	0.3	-4%

## 3. COMPLETE SCOPE OF WORK & REPORT


### 3.1 REPORT TAB

Snugg Pro creates a custom report that can be shared with the client via email

To customize a report, click "Report" on the left sidebar.

- You can add photos, comments, or other custom details.
- To hide report pages, click the "Pages" tab at top of report, just above page title.

Energy Friendly Homes Program has customized Snugg Pro work order to show the breakdown of the Energy Savings Improvements and Critical Repair Improvements and ETO incentives.

Energy Saving Improvements 	\$ 36,400.00
Critical Repair Improvements	\$ 11,379.50
Energy Trust CPF Incentives	\$ -3,440.00

### 3.2 REQUEST SCOPE OF WORK APPROVAL FROM QA PROVIDER

Click the job name in the upper left corner. A pop-up will appear.

Change the "Stage" drop down to "Bid Proposed".

## Job #296068



Created on November 20, 2024 • PCEF • Portland Clean Energy Fund

Stage:

Audit ▾

**Active Jobs**

- Lead
- Audit
- Bid Proposed**
- Bid Approved

Upload required additional documents. (i.e. heating and cooling load calc)

- Click the "Tickets" button at top right of page to display the "Tickets for This Job" dropdown.
- Click on "Scope of Work Submittal"

### BURCH ENERGY SERVICES QA WORKFLOW



#### Scope of Work Submittal

Submitted for Review

21 days ago

- Upload your files
- Click "comments" to add a note for the QA provider.
- Click "Submit for Review" to submit the project to QA provider for scope review.

## Scope of Work Submittal

4. Submit for review

Submit for Review

Test Test

# 325704

Capital R Construction

### In Energy Friendly Homes Program

1001 Oregon 213  
Portland, OR 97220  
Phone: (303) 565-9887  
Email: test@gmail.com

Bid Proposed

Job Report Map

### Reem Alkattan

Office: None provided  
Mobile: None provided  
Email: reemalkattan11@gmail.com

### Description

Submit your Scope of Work (SOW) to Burch Energy Quality Assurance Provider to be approved.

### Comments

File Uploads 0 of 15 Other Tickets

2. Contractor will upload their SOW and any other supporting documents

### Comments

Snugg Bot a few seconds ago  
Reem created this ticket

3. Leave a comment for QA Provider. This is where Burch will also respond to contractor about SOW changes or issues.

Write a comment

QA provider will review the scope within 5 days. You will receive an email from "Snugg Pro Workflow", notifying you that that your scope of work is approved or that changes are requested. If the QA provider recommends changes to the scope, they will provide comments in Snugg Pro.

If QA Provider has additional notes, they will submit their SOW review notes and requested changes in a separate document in Snugg Pro.

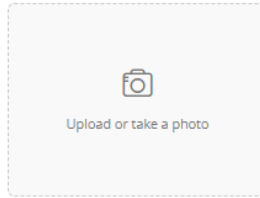
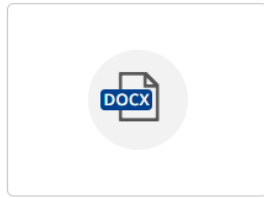
## Files

### SCOPE OF WORK

Contractor SOW

REQUIRED

Burch SOW Review



Add caption or notes...

Make requested changes and resubmit scope for review:

- Click "Tickets" in upper right corner and then select the Scope of Work Submittal workflow for the job. Upload any documents and provide any clarification notes. Then click "Submit for Review" again.

When the QA provider approves the scope, they will change the project status to "Bid Approved". You will receive an email from "Snugg Pro Workflow" informing you that your scope of work has been approved.

## 3.3 REQUEST SCOPE OF WORK APPROVAL FROM CLIENT

After the scope of work is approved by the QA Provider, contractor must also get client approval on the scope of work. All contractors must have an active contract in place with their client before starting any work under the program. The contractor is responsible for submitting proof of the client's approval or signatures such as a signed contract or written confirmation to the program team. This documentation must be received and by the program before any installation or down payment can proceed.

## 4. COMPLETE RETROFIT

### 4.1 POPULATE CHECKLIST

For each type of energy upgrade, PCEF has a [contractor checklist](#), available in English and Spanish. Contractors should complete these checklists as they complete each upgrade:

[PCEF air sealing](#)

[PCEF duct sealing and insulation](#)

[PCEF HVAC balanced HRV-ERV](#)

[PCEF crawlspace floor insulation-vented](#)

[PCEF ducted heat pump checklist](#)

[PCEF ductless heat pump checklist](#)

[PCEF insulation basement wall](#)

[PCEF insulation walls masonry](#)

[PCEF insulation and air sealing - attic unvented](#)

[PCEF insulation and air sealing - attic vented](#)

[PCEF insulation and air sealing - crawlspace unvented](#)

[PCEF insulation walls framed](#)

[PCEF ventilation - exhaust fan kitchen](#)

[PCEF ventilation - exhaust fan bathroom](#)

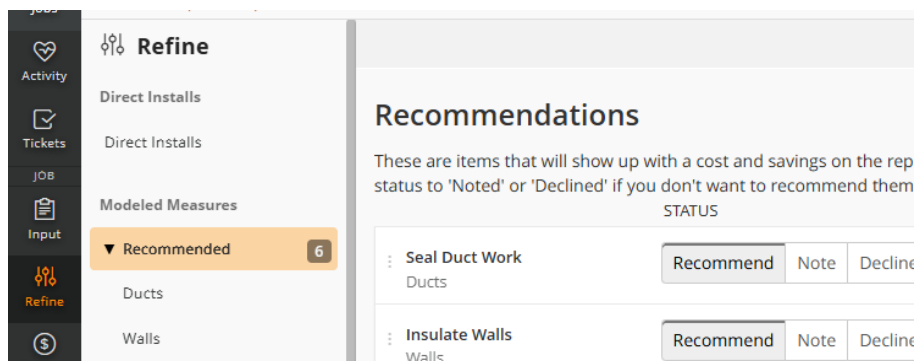
[PCEF water heater - heat pump](#)

[PCEF window replacement](#)

## 4.2 POST-RETROFIT INFORMATION

When work is complete, the contractor can conduct a site visit and confirm installed upgrades. It is encouraged to combine this visit with the QA Provider visit to verify the installations. The contractor records findings in Snugg Pro and makes any changes to reflect the upgrades completed.

To log final values, click "Refine" on the left toolbar.



Click through each recommended measure. Add photos documenting the final installation and scroll down to the "Now and Goal" section. Update the "IMPROVED" section to reflect the actual values. For scopes that require blower door testing, change IMPROVED entry from "Estimate" to "Tested".

The screenshot shows a sidebar on the left with a 'Refine' header and a list of measures under 'Modeled Measures', including 'Recommended' (8 items), 'Custom: Asbestos mitig...', 'Custom: Attic knob & tu...', and 'Ducts'. The main content area is titled 'Now and Goal:' and contains two sections: 'Blower Door Test Performed' and 'Blower Door Reading'. Each section has 'BASE' and 'IMPROVED' columns. In the 'Blower Door Test Performed' section, the 'IMPROVED' column has 'Tested' selected. In the 'Blower Door Reading' section, the 'BASE' column has '4,200' and 'CFM50', and the 'IMPROVED' column has '2,430' and 'CFM50'.


### 4.3 QA FINAL INSPECTION


To submit the project for final QA inspection, click the job name in the upper left corner. A pop-up will appear. Click the "Stage" drop down and select "Retrofit Complete".

The screenshot shows a job pop-up for 'Job #296068' created on November 20, 2024, by PCEF (Portland Clean Energy Fund). The 'Stage' dropdown menu is open, showing options: 'Retrofit In Progress', 'Active Jobs', 'Lead', 'Audit', 'Bid Proposed', 'Bid Approved', 'Retrofit In Progress', 'Retrofit Complete' (highlighted in blue), 'QA', and 'Uncategorized'. A 'Delete job' button is visible at the bottom right.

To submit additional required documents, go to the top right button called "Tickets" and click on "Final QA - Retrofit Complete".

## BURCH ENERGY SERVICES QA WORKFLOW

 **Scope of Work Submittal**  
Submitted for Review 21 days ago

 **Final QA - Retrofit Complete**  
Create this ticket


Go to “File Uploads” to upload documents


Comments **File Uploads 0 of 2** Other Tickets

**Files**

**RELATED FILES**

Final Invoice **REQUIRED** Supplemental Documentation

 Upload or take a photo

 Upload or take a photo

Add comments if needed in the “Comments” section.

Click “Submit for Review” to submit the documents for final Quality Assurance inspection. Documents could include but are not limited to:

- Lead safe work documentation
- ASHRAE calculator
- Diagnostic sheets
- Permits
- Photos
  - Include photos and/or sketches per the recommend [Photo Checklist](#).

If changes are requested or when your Ticket is approved, you’ll receive an email from Snugg Pro Workflow.

The QA Provider will review final paperwork and perform the site visit. If corrections are needed, the QA provider will provide guidance and inform contractors of next steps to finalize the project.

- Requested corrections shall be completed within 30 days. QA Provider will reinspect to confirm corrections are complete.

Once QA is complete, QA Provider will change the project status to "Archived Won". The project is complete!

## JOB REASSIGNMENT IN SNUGG PRO

In cases where client has requested a 2<sup>nd</sup> bid from a different contractor, the first contractor will be notified that the job will be reassigned, and program team will archive the job in Snugg Pro as "Archived Lost". The second contractor will create their own job and perform the home assessment to build their scope of work. (See Contractor Handbook for details on reassignment).