



## Data Collection Form

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### Location Information

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Assessment Type: **Initial / Final / QA / Alternative EEM** (Energy Efficiency Measures) / **Test / Corrected / Mentor / Preconstruction**

Assessment Date: \_\_\_\_\_ Assessor: \_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Home Details

Year Built: \_\_\_\_\_ # of Bedrooms: **1 / 2 / 3 / 4 / 5 / 6 / 7 / 8 / 9 / 10** # of Stories Above Grade: **1 / 2 / 3 / 4**

Average Ceiling Height (ft): **6 / 7 / 8 / 9 / 10 / 11 / 12** Conditioned Floor Area (sq ft): \_\_\_\_\_

Direction Faced by Front of House: **N / NE / E / SE / S / SW / W / NW**

### Air Tightness

Was a Blower Door test conducted on this house?: **Yes / No**

Air Leakage rate: \_\_\_\_\_ cfm50 Has the house been professionally air sealed?: **Yes / No**

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**Roof / Attic 1** Attic 1 Area (sq ft): \_\_\_\_\_

Roof Construction: **Standard Roof / with Radiant Barrier / with Rigid Foam Sheathing**

Exterior Finish: **Composition Shingles or Metal / Wood Shakes / Clay Tile / Concrete Tile / Tar & Gravel**

Insulation Level (applied to roof): **R-0 / R-11 / R-13 / R-15 / R-19 / R-21 / R-27 / R-30**

Roof Color: **White / Light / Medium / Medium Dark / Dark / Cool Color: \_\_\_\_\_** (reflectivity)

Attic or Ceiling Type: **Unconditioned Attic / Conditioned Attic / Cathedral Ceiling**

Attic Floor Insulation: **R-0 / R-3 / R-6 / R-9 / R-11 / R-19 / R-21 / R-25 / R-30 / R-38 / R-44 / R-49 / R-60**

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**Roof / Attic 2**

Attic 2 Floor Area (sq ft): \_\_\_\_\_

Roof Construction: **Standard Roof / with Radiant Barrier / with Rigid Foam Sheathing**

Exterior Finish: **Composition Shingles or Metal / Wood Shakes / Clay Tile / Concrete Tile / Tar & Gravel**

Insulation Level (applied to roof): **R-0 / R-11 / R-13 / R-15 / R-19 / R-21 / R-27 / R-30**

Roof Color: **White / Light / Medium / Medium Dark / Dark / Cool Color:** \_\_\_\_\_ (reflectivity)

Attic or Ceiling Type: **Unconditioned Attic / Conditioned Attic / Cathedral Ceiling**

Attic Floor Insulation: **R-0 / R-3 / R-6 / R-9 / R-11 / R-19 / R-21 / R-25 / R-30 / R-38 / R-44 / R-49 / R-60**

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**Foundation 1**

Foundation 1 Area (sq ft): \_\_\_\_\_

Type: **Slab-on-Grade / Unconditioned Basement / Conditioned Basement / Unvented Crawlspace / Vented Crawlspace**

Floor Insulation over Basement or Crawlspace: **R-0 / R-11 / R-13 / R-15 / R-19 / R-21 / R-25 / R-30 / R-38**

Foundation Wall Insulation: **R-0 / R-5 (slab only) / R-11 (bsmt/crawl wall) / R-19 (bsmt/crawl wall)**

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**Foundation 2**

Foundation 2 Area (sq ft): \_\_\_\_\_

Type: **Slab-on-Grade / Unconditioned Basement / Conditioned Basement / Unvented Crawlspace / Vented Crawlspace**

Floor Insulation over Basement or Crawlspace: **R-0 / R-11 / R-13 / R-15 / R-19 / R-21 / R-25 / R-30 / R-38**

Foundation Wall Insulation: **R-0 / R-5 (slab only) / R-11 (bsmt/crawl wall) / R-19 (bsmt/crawl wall)**

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**Walls**

Is this home a Townhouse or Duplex?: **Yes / No**

Position of Unit: **Middle / Right / Left**

Wall Characteristics: **Front or All** (circle one)

Construction: **Wood Frame / Wood Frame with rigid foam sheathing / Wood Frame with Optimum Value Engineering (OVE) / Structural Brick / Concrete Block or Stone / Straw Bale**

Exterior Finish: **Wood Siding, Fiber Cement, Composite Shingle or Masonite Siding / Stucco / Vinyl Siding / Aluminum Siding / Brick Veneer / none**

Wall Insulation: **R-0 / R-3 / R-6 / R-7 / R-11 / R-13 / R-15 / R-19 / R-21 / R-27 / R-33 / R-38**

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**Skylights: Yes or No (circle one):**

Total Skylight Area (sq. ft.): \_\_\_\_\_ Number of Panes: **Single-pane / Double-pane / Triple-pane**

Frame Type: **Aluminum / Aluminum with Thermal Break / Wood or Vinyl**

Glazing Type: **Clear / Tinted / Solar-control low-E / Solar-control low-E, argon gas fill / Insulating low-E / Insulating low-E, argon gas fill**

**-OR-** Actual window specifications = U-Factor (from 0.01 – 5.00): \_\_\_\_\_ SHGC (from 0.0 – 1.0): \_\_\_\_\_

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**Window Area (sq. ft.):**

Front: \_\_\_\_\_ Back: \_\_\_\_\_ Right Side: \_\_\_\_\_ Left Side: \_\_\_\_\_

**Window Characteristics: Front or All (circle one)** Solar Screens: **Yes / No**

Panes: **Single-pane / Double-pane / Triple-pane**

Frame Type: **Aluminum / Aluminum with Thermal Break / Wood or Vinyl**

Glazing Type: **Clear / Tinted / Solar-control low-E / Solar-control low-E, argon gas fill / Insulating low-E / Insulating low-E, argon gas fill**

**-OR-** Actual window specifications = U-Factor (from 0.01 – 5.00): \_\_\_\_\_ SHGC (from 0.0 – 1.0): \_\_\_\_\_

>BACK<

**Wall Characteristics: Back**

Construction: **Wood Frame / Wood Frame with Rigid Foam Sheathing / Wood Frame with Optimum Value Engineering (OVE) / Structural Brick / Concrete Block or Stone / Straw Bale**

Exterior Finish: **Wood Siding, Fiber Cement, Composite Shingle or Masonite Siding / Stucco / Vinyl Siding / Aluminum Siding / Brick Veneer**

Wall Insulation: **R-0 / R-3 / R-6 / R-7 / R-11 / R-13 / R-15 / R-19 / R-21 / R-27 / R-33 / R-38**

**Window Characteristics: Back** Solar Screens: **Yes / No**

Panes: **Single-pane / Double-pane / Triple-pane**

Frame Type: **Aluminum / Aluminum with Thermal Break / Wood or Vinyl**

Glazing Type: **Clear / Tinted / Solar-control low-E / Solar-control low-E, argon gas fill / Insulating low-E / Insulating low-E, argon gas fill**

**-OR-** Actual window specifications = U-Factor (from 0.01 – 5.00): \_\_\_\_\_ SHGC (from 0.0 – 1.0): \_\_\_\_\_

>RIGHT SIDE<

**Wall Characteristics: Right Side (facing house)**

Construction: Wood Frame / Wood Frame with Rigid Foam Sheathing / Wood Frame with Optimum Value Engineering (OVE) / Structural Brick / Concrete Block or Stone / Straw Bale

Exterior Finish: Wood Siding, Fiber Cement, Composite Shingle or Masonite Siding / Stucco / Vinyl Siding / Aluminum Siding / Brick Veneer

Wall Insulation: R-0 / R-3 / R-6 / R-7 / R-11 / R-13 / R-15 / R-19 / R-21 / R-27 / R-33 / R-38

**Window Characteristics: Right Side (facing house)**

Solar Screens: Yes / No

Panes: Single-pane / Double-pane / Triple-pane

Frame Type: Aluminum / Aluminum with Thermal Break / Wood or Vinyl

Glazing Type: Clear / Tinted / Solar-control low-E / Solar-control low-E, argon gas fill / Insulating low-E / Insulating low-E, argon gas fill

-OR- Actual window specifications = U-Factor (from 0.01 – 5.00): \_\_\_\_\_ SHGC (from 0.0 – 1.0): \_\_\_\_\_

>LEFT SIDE<

**Wall Characteristics: Left Side (facing house)**

Construction: Wood Frame / Wood Frame with Rigid Foam Sheathing / Wood Frame with Optimum Value Engineering (OVE) / Structural Brick / Concrete Block or Stone / Straw Bale

Exterior Finish: Wood Siding, Fiber Cement, Composite Shingle or Masonite Siding / Stucco / Vinyl Siding / Aluminum Siding / Brick Veneer

Wall Insulation: R-0 / R-3 / R-6 / R-7 / R-11 / R-13 / R-15 / R-19 / R-21 / R-27 / R-33 / R-38

**Window Characteristics: Left Side (facing house)**

Solar Screens: Yes / No

Panes: Single-pane / Double-pane / Triple-pane

Frame Type: Aluminum / Aluminum with Thermal Break / Wood or Vinyl

Glazing Type: Clear / Tinted / Solar-control low-E / Solar-control low-E, argon gas fill / Insulating low-E / Insulating low-E, argon gas fill

-OR- Actual window specifications = U-Factor (from 0.01 – 5.00): \_\_\_\_\_ SHGC (from 0.0 – 1.0): \_\_\_\_\_

**System 1**      % of floor area served: \_\_\_\_\_

**Heating (System 1)**

Type of Heating 1 System: **None / Central gas furnace / Room (through-the-wall) gas furnace / Gas boiler / Propane (LPG) central furnace / Propane (LPG) wall furnace / Propane (LPG) boiler / Oil furnace / Oil Boiler / Electric furnace / Electric heat pump / Electric baseboard heater / Ground coupled heat pump / Minisplit (ductless) heat pump / Electric boiler / Wood Stove / Pellet Stove**

**Heating System 1 Efficiency:**      Do you know the actual heating system efficiency?: **Yes / No\***

\*You can use the Assessor Calculator to determine the approximate efficiency!

Efficiency Value (AFUE or HSPF): \_\_\_\_\_ **OR** Year Installed: \_\_\_\_\_

**Cooling (System 1)**

Type of Cooling 1 System: **None / Central air conditioner / Room air conditioner / Electric heat pump / Minisplit (ductless) heat pump / Ground coupled heat pump / Direct evaporative cooling**

**Cooling System 1 Efficiency:**      Do you know the actual cooling system efficiency?: **Yes / No\***

\*You can use the Assessor Calculator to determine the approximate efficiency!

Efficiency Value (SEER or EER): \_\_\_\_\_ **OR** Year Installed: \_\_\_\_\_

**Duct (System 1)**

Duct Location 1 (#1): **Conditioned Space / Unconditioned basement / Vented crawlspace / Unvented crawlspace / Unconditioned attic**

Percentage of Ducts in this location: \_\_\_\_\_ Are ducts sealed?: **Yes / No** Are ducts insulated?: **Yes / No**

Duct Location 1 (#2): **Conditioned Space / Unconditioned basement / Vented crawlspace / Unvented crawlspace / Unconditioned attic**

Percentage of Ducts in this location: \_\_\_\_\_ Are ducts sealed?: **Yes / No** Are ducts insulated?: **Yes / No**

Duct Location 1 (#3): **Conditioned Space / Unconditioned basement / Vented crawlspace / Unvented crawlspace / Unconditioned attic**

Percentage of Ducts in this location: \_\_\_\_\_ Are ducts sealed?: **Yes / No** Are ducts insulated?: **Yes / No**

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**System 2**      % of floor area served: \_\_\_\_\_

**Heating (System 2)**

Type of Heating 2 System: **None / Central gas furnace / Room (through-the-wall) gas furnace / Gas boiler / Propane (LPG) central furnace / Propane (LPG) wall furnace / Propane (LPG) boiler / Oil furnace / Oil Boiler / Electric furnace / Electric heat pump / Electric baseboard heater / Ground coupled heat pump / Minisplit (ductless) heat pump / Electric boiler / Wood Stove / Pellet Stove**

**Heating System 2 Efficiency:** Do you know the actual heating system efficiency?: Yes / No\*

\*You can use the Assessor Calculator to determine the approximate efficiency!

Efficiency Value (AFUE or HSPF): \_\_\_\_\_ **OR** Year Installed: \_\_\_\_\_

**Cooling (System 2)**

Type of Cooling 2 System: **None / Central air conditioner / Room air conditioner / Electric heat pump / Minisplit (ductless) heat pump / Ground coupled heat pump / Direct evaporative cooling**

**Cooling System 2 Efficiency:** Do you know the actual cooling system efficiency?: Yes / No\*

\*You can use the Assessor Calculator to determine the approximate efficiency!

Efficiency Value (SEER or EER): \_\_\_\_\_ **OR** Year Installed: \_\_\_\_\_

**Duct (System 2)**

Duct Location 2 (#1): **Conditioned Space / Unconditioned basement / Vented crawlspace / Unvented crawlspace / Unconditioned attic**

Percentage of Ducts in this location: \_\_\_\_\_ Are ducts sealed?: Yes / No Are ducts insulated?: Yes / No

Duct Location 2 (#2): **Conditioned Space / Unconditioned basement / Vented crawlspace / Unvented crawlspace / Unconditioned attic**

Percentage of Ducts in this location: \_\_\_\_\_ Are ducts sealed?: Yes / No Are ducts insulated?: Yes / No

Duct Location 2 (#3): **Conditioned Space / Unconditioned basement / Vented crawlspace / Unvented crawlspace / Unconditioned attic**

Percentage of Ducts in this location: \_\_\_\_\_ Are ducts sealed?: Yes / No Are ducts insulated?: Yes / No

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**Hot Water:**

Water Heater Type: **Electric Storage / Natural Gas Storage / LPG Storage / Oil Storage / Electric Instantaneous / Gas Instantaneous / Propane Instantaneous / Electric Heat Pump**

**Hot Water System Efficiency:** Do you know the actual water heater energy factor?: Yes (EF) / Yes (UEF) / No\*

\*You can use the Assessor Calculator to determine the approximate energy factor (EF)!

Energy Factor (between 0.0 – 1.0): \_\_\_\_\_ **OR** Year Installed: \_\_\_\_\_

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**Photovoltaic (PV) System**

Year Installed: \_\_\_\_\_ Direction Panels Face: **N / NE / E / SE / S / SW / W / NW**

# of Panels: \_\_\_\_\_ **or** DC Capacity: \_\_\_\_\_

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**Notes:**

## Assessment Checklist

### General Info:

- Year
- # of bedrooms
- Blower door test?
- Professionally air sealed?
- Window specs?

### Outside

- House Orientation
- # of stories
- Roof: Predominant exterior finish
  - Color
- Walls: Same type on all sides?
  - Construction type
  - Exterior finish
- Windows: Same on all sides?
  - Panes
  - Frame
  - Glazing

### Inside

- Attic
  - Roof Construction
  - Insulation type & amount
  - Air sealed?
  - Air handler present? Type and year
  - Ducts?: Insulated? Sealed?

- Upper Floor
  - Square feet
  - Ceiling Height
  - Skylights?
  - Windows
- Main Floor
  - Square feet
  - Ceiling Height
  - Skylights?
  - Windows
  - Walls & insulation
- Crawlspace - insulation type & amount
  - Ducts?: Insulated? Sealed?
- Basement – Conditioned?
  - Square feet
  - Ceiling Height
  - Windows
  - Walls & insulation
- HVAC Equipment
  - Type?
  - Year or SN?
- Water Heater
  - Type?
  - Year or SN?
- PV
  - Age
  - Orientation
  - # of Panels or Capacity

Window Dimensions:

Front	Back	Right	Left

Layout:

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