

SET YOUR
HOME  FOR
ENERGIZE!

WHY APPLY?

- Improve Your Home's Comfort
- Increase Your Home's Value
- Hedge Against Rising Energy Prices
- Energy Savings May Partially Offset Loan Payment



WHY
NOT?

“I don't have the
money right now.”



“I don't know where to
start or who to trust?”

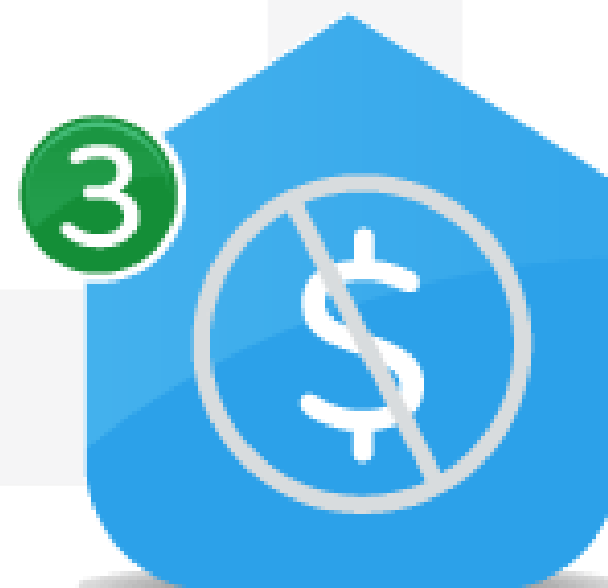
HOW IT WORKS



APPLY
Customer



ASSESS
Contractor
and
Energy
Advisor



FINANCE
Financial
Institution



TRANSFORM
Contractor
and
Energy
Advisor




1. APPLY

A screenshot of the 'HOMEOWNER APPLICATION' form on the Clean Energy Works Oregon website. The form is titled 'HOMEOWNER APPLICATION' and includes a progress bar showing 'Step 1' as the active step. The form contains a privacy notice, an 'Instant Rebate Code' field with the value 'LGPDXS2', and several other input fields: 'Street Address', 'City', 'State', 'Zip Code', 'First Name', 'Last Name', 'Phone Number', 'Email Address', and 'Confirm Email Address'. A navigation menu at the top includes 'HOME', 'APPLY NOW', 'OUR BLOG', 'YOUR PROJECT', 'HOW IT WORKS', and 'ABOUT US'. The Clean Energy Works Oregon logo is in the top-left corner of the page.


YOUR PROJECT








HOME
APPLY NOW
OUR BLOG
NEW
YOUR PROJECT
HOW IT WORKS
ABOUT US

YOUR PROJECT

1

APPLY


2

ASSESS

3

FINANCE

4

TRANSFORM

STEP	A. Apply Online	B. Application Complete	C. Approved
STATUS	Congratulations, your application has been approved! Welcome to Clean Energy Works Oregon!		


NEXT STEPS



Scheduling Your Home Energy Assessment

Our customer service team will be calling you shortly to schedule your free Home Energy Assessment - the first step on your way to a more comfortable and energy efficient home.

WHAT TO EXPECT




CEWO 101



Kicking off your project starts with a phone call. We'll schedule your free Home Energy Assessment, pair you with your contractor and Energy Advisor and run through the process with you. We aim to make you as comfortable as possible, right from the start. [Learn more >>](#)

APPLY FAQs

- + Am I eligible for Clean Energy Works Oregon?
- + Can I also apply for the cash incentives offered through the Energy Trust of Oregon?
- + Can I take the rebates as cash back instead of applying them to my loan?
- + Do I get to choose my contractor?
- + Do I have to finance my CEWO Home Energy Remodel or can I pay cash?

SHARE YOUR PROJECT



-  Upload a photo of your project to our Flickr page
-  Follow us on Twitter

Loan Calculator
What can you afford?

Your Team

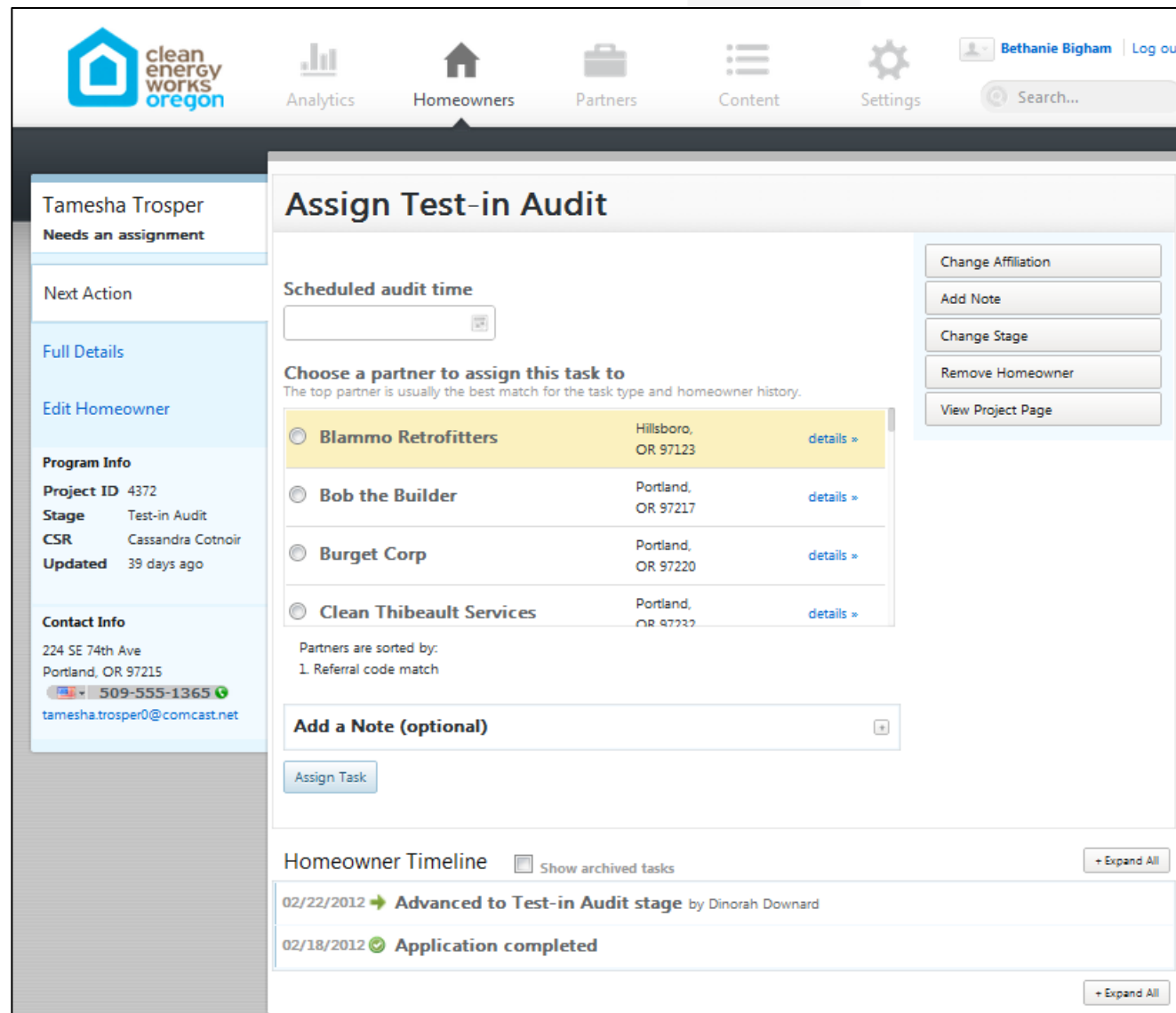
Project Docs (0)

Master Schedule

Your To-Do List



2. ASSESS



The screenshot displays the 'Assign Test-in Audit' interface. On the left, a sidebar shows the user profile for Tamesha Trospier, who needs an assignment. The main content area includes a 'Scheduled audit time' field, a list of partner options, and a 'Homeowner Timeline' section.

Assign Test-in Audit

Scheduled audit time:

Choose a partner to assign this task to
The top partner is usually the best match for the task type and homeowner history.

<input checked="" type="radio"/> Blammo Retrofitters	Hillsboro, OR 97123	details >
<input type="radio"/> Bob the Builder	Portland, OR 97217	details >
<input type="radio"/> Burget Corp	Portland, OR 97220	details >
<input type="radio"/> Clean Thibeault Services	Portland, OR 97222	details >

Partners are sorted by:
1. Referral code match

Add a Note (optional)

Assign Task

Homeowner Timeline Show archived tasks [Expand All](#)

- 02/22/2012 → Advanced to Test-in Audit stage by Dinorah Downard
- 02/18/2012 ✓ Application completed [Expand All](#)

- Online task assignments
- Test-in Audit = Home Energy Assessment with high-tech diagnostics



2. ASSESS

Daniele Doane

Next Action

Full Details

Program Info

Project ID 3827

Stage Bid Preparation

Updated 41 days ago

Contact Info

3409 NE Glisan St
Portland, OR 97232

360-555-3316

daniele.doane0@comcast.net

Complete Bid Preparation

6 days past due

Assigned Feb. 20, 2012 [Jump to Timeline](#)

Due date: **March 26, 2012**

Extend Due Date This task can not be completed

Add Note

View Project Page

Last update by: Bob Builder

Bid template

Choose File No file chosen

Bid

Choose File No file chosen

Bid amount (\$)

Estimated energy savings (percentage)

Measures covered

Wall insulation

Attic insulation

Floor insulation

Furnace or heat pump

Duct work

Air sealing

Water heater

Windows

Contingency measures

attic insulation

Do you attest that the measures covered by the bid are in compliance with SHPO?

Yes

No

[Download programmatic agreement](#)


SHPO exception clearance form and SHPO case number are required if bid is not in compliance.

SHPO exception clearance form

- Assessment Report/Custom Bid:
 1. Contractor uploads
 2. Energy Advisor verifies
 3. Your Project displays


3. FINANCE






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1 APPLY ✓



2 ASSESS ✓



3 FINANCE



4 TRANSFORM

STEP

A. Choose a Loan

B. Loan Application



C. Loan Documents

STATUS

Congratulations, you've signed your bid! Your Instant Rebates have been reserved and will be waiting for you once you sign your loan documents.

NEXT STEPS

It's time to select the right loan for your Home Energy Remodel. Choose from the options below.

Umpqua	Craft3
	
<p>Unsecured loan \$5,001 to \$20,000</p> <p>Ideal for:</p> <p>Larger projects or projects that include non-energy related upgrades (up to 49% the project cost).</p> <p>Rate and APR Annual Percentage Rate as low as 6.25%. Rate fixed for term of loan.</p> <p>Term Up to 10 years (120 months).</p> <p style="font-size: x-small;">VIEW DETAILS</p>	<p>Secured Loan up to \$30,000</p> <p>Ideal for:</p> <p>Homeowners that want a longer term in order to minimize monthly payment and the convenience of repayment through your heating utility bill.</p> <p>Rate and APR Annual Percentage Rate as low as 5.99%, Fixed Rate.</p> <p>Term Up to 20 years.</p> <p style="font-size: x-small;">VIEW DETAILS</p>
<div style="background-color: #0070c0; color: white; padding: 5px; width: 100px; margin: auto;">SELECT THIS LOAN</div>	<div style="background-color: #0070c0; color: white; padding: 5px; width: 100px; margin: auto;">SELECT THIS LOAN</div>

Loan Calculator 📱

What can you afford?

Loan Amount: \$

Term (years):

Interest Rate (APR): %

CALCULATE

Monthly Payment: \$

Your Team
+

Project Docs (4)
+

Master Schedule
+

Your To-Do List
+

SHARE YOUR PROJECT

3. FINANCE



Dashboard Homeowners Program Info Settings

Craft3 Bank | Log out

Search...

Don Darst

Next Action

Full Details

Program Info

Project ID 3129

Stage Loan Approval

Updated 35 days ago

Contact Info

7032 N Van Houten Ave
Portland, OR 97203

971-555-2811

don.darst0@hotmail.com

Complete Loan Approval 17 days past due

Assigned Feb. 27, 2012 Jump to Timeline ▾

Due date: March 15, 2012

Extend Due Date

This task can not be completed

Loan approved

Welcome letter (optional)

Choose File No file chosen

Send Now

Save & Send Later

Add Note

View Project Page

Signed bid: [Download File](#)

Last update by: Craft3 Bank

Homeowner Timeline Show archived tasks + Expand All

02/24/2012 ✔ **Loan Application** **Completed in less than a day** by Craft3

Loan Application Task History

02/24/2012 3:35 p.m.	Completed	by Karolyn Kornfeld
02/24/2012 3:08 p.m.	Opened	by Karolyn Kornfeld
02/24/2012 10:26 a.m.	Assigned	by Dinorah Downard

Last modified: 37 days ago by Craft3

Assigned on: Feb. 24, 2012

Closed on: Feb. 24, 2012

02/23/2012 🏠 **Loan Selected** (Craft3)

02/22/2012 ✔ **Bid Acceptance** **Completed in 7 days** by Primattech Enterprises

02/15/2012 ● **Bid Acceptance** **Assigned to Primattech Enterprises**

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Slide 10

4. TRANSFORM



HOME
APPLY NOW
OUR BLOG
NEW
YOUR PROJECT
HOW IT WORKS
ABOUT US

YOUR PROJECT

1
APPLY ✓

2
ASSESS ✓

3
FINANCE ✓

4
TRANSFORM

STEP
A. Work Begins
B. Quality Review
C. Invoice
D. Project Complete

STATUS Congratulations! Your CEWO Home Energy Remodel is complete, and you've officially Joined the Future!

NEXT STEPS

Share Your Story - Be A Star!

Keep making a difference! Refer a friend or tell us about your experience with CEWO. Your home may be a star feature in our marketing. Share your story >>

WHAT TO EXPECT

Welcome to your new, old home!

Now that your home's transformation is complete, enjoy a transformation yourself. No more bulky sweaters in winter and dripping sheets in summer. It's state-of-the-art, energy-efficient comfort year-round for you. You're going to love your home more than ever before!

TRANSFORM FAQs

- + Can I get multiple bids?
- + Can I use my own contractor?
- + Can't I do all of this on my own?
- + How long will this take?
- + Is Solar included?
- + What if I am unhappy with my contractor and want a different one?

Loan Calculator

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Your Team

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11

LOCAL & REPLICABLE

- Website, platform centrally managed/supported
- Co-branded marketing
- Partners are local



SET YOUR
HOME  FOR
ENERGIZE!

APPLY AT CEWO.ORG

