



CalCERTS

Registry User Manual



Version: October 14, 2019

www.calcerts.com

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Introduction

CalCERTS, Inc. is a Home Energy Rating System (HERS) Provider approved by the California Energy Commission. CalCERTS is governed by the [HERS Regulations](#), codified under Title 20 of the California Code of Regulations.

The CalCERTS Registry has been tested and approved by the California Energy Commission to register compliance documents for California's Building Energy Efficiency Standards for the 2005, 2008, 2013, 2016, and 2019 code cycles. The Building Energy Efficiency Standards are codified under [Title 24, Part 6 of the California Code of Regulations](#), and are updated every three years.

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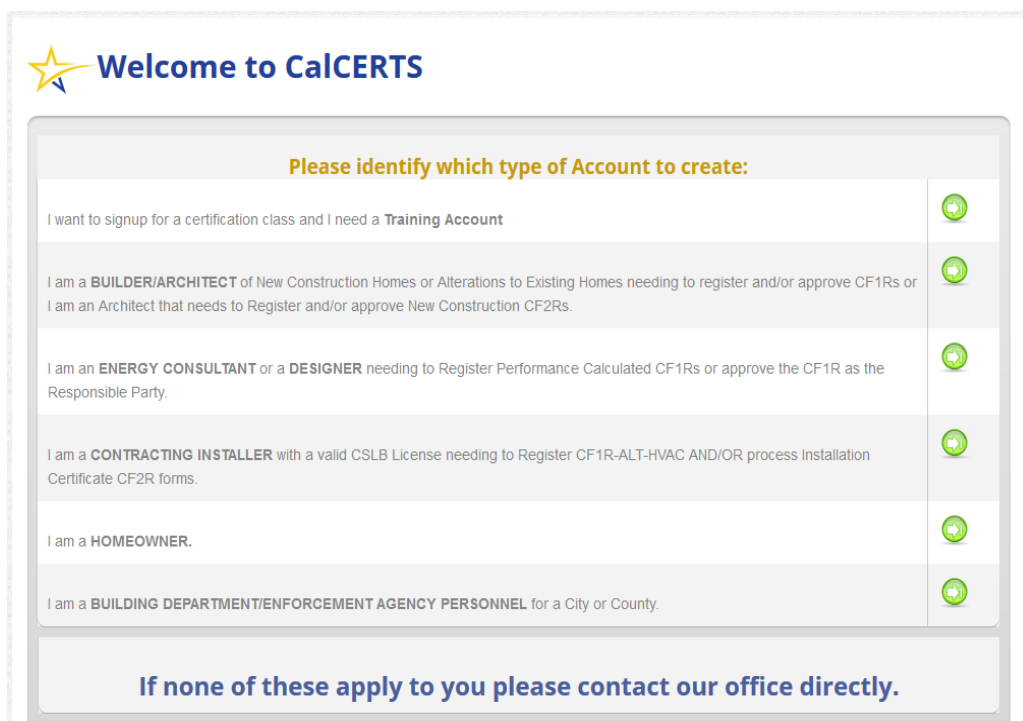
Registry Overview

User Registration


- To create an account as a user within the CalCERTS registry go to www.calcerts.com and select **Create An Account** 




- The registration process differs depending on the type of user. Select the appropriate process based on user type.

The screenshot shows the "Welcome to CalCERTS" registration page. It features a heading "Please identify which type of Account to create:" followed by a list of six options, each with a green radio button. The options are: "I want to signup for a certification class and I need a Training Account", "I am a BUILDER/ARCHITECT of New Construction Homes or Alterations to Existing Homes needing to register and/or approve CF1Rs or I am an Architect that needs to Register and/or approve New Construction CF2Rs.", "I am an ENERGY CONSULTANT or a DESIGNER needing to Register Performance Calculated CF1Rs or approve the CF1R as the Responsible Party.", "I am a CONTRACTING INSTALLER with a valid CSLB License needing to Register CF1R-ALT-HVAC AND/OR process Installation Certificate CF2R forms.", "I am a HOMEOWNER.", and "I am a BUILDING DEPARTMENT/ENFORCEMENT AGENCY PERSONNEL for a City or County." At the bottom of the form, there is a blue button that says "If none of these apply to you please contact our office directly."


- **HERS Raters**

- HERS Raters may self-register by selecting the  link and inputting their contact information. They are linked to a training account while going through the training process.


- **Builder/Architect**

- Builder/Architects must register with CalCERTS to sign Certificates of Compliance (CF1Rs) and Certificates of Installation (CF2Rs) if needed.
- Builder/Architects may self-register by selecting the  link and inputting their company information through the three-step process. Once CalCERTS verifies the company information submitted, the Builder/Architect will be emailed a link to set their password and access the CalCERTS Registry.


- **Energy Consultant/Designer**

- Energy Consultants must register with CalCERTS in order to upload Certificates of Compliance (CF1Rs) files from EnergyPro, CBECC, or Wrightsoft.
- Energy Consultants may self-register by selecting the  link and inputting the required information, after which they will be emailed a link to set their password and access the CalCERTS Registry.


- **Contracting Installer**

- Installers must register with CalCERTS in order to start projects with CalCERTS or enter and sign Certificates of Installation (CF2Rs).
- Installers may self-register by selecting the  link and inputting the required information, which must include a valid CSLB license number. Once the information is received, the Contracting Installer will be emailed a link to set their password and access the CalCERTS Registry.



- **Homeowners**

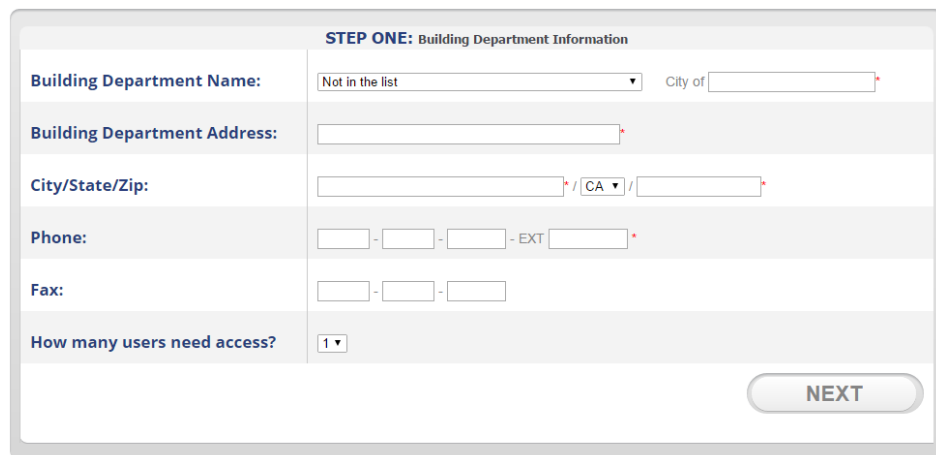
- Homeowners must register with CalCERTS to sign Certificates of Compliance (CF1Rs) and Certificates of Installation (CF2Rs) if needed.
- Homeowners may self-register by selecting the  link and inputting the required information, which includes a valid photo I.D. Once the I.D. has been verified the Homeowner will be emailed a link to set their password and access the CalCERTS Registry.

- **Building Departments**

- Building Departments must register with CalCERTS to view the Project Status Report and registered CF1Rs for their jurisdiction.
- Building Departments may self-register by selecting the  link and inputting their company information through the three-step process. Once CalCERTS verifies the information submitted, the Building Department will be emailed a link to set the password and access the CalCERTS Registry.

- **Building Department Self-Registration Process**

- Visit www.calcerts.com
- Click **Create An Account**  located in the upper right of our home page.
- Click the **Register** icon  located to the right of
I am a **BUILDING DEPARTMENT/ENFORCEMENT AGENCY PERSONNEL** for a City or County.
- Input the required information for **Step One** and Click **NEXT**:
- **Note:** You can register as many users needed within your Building Department.

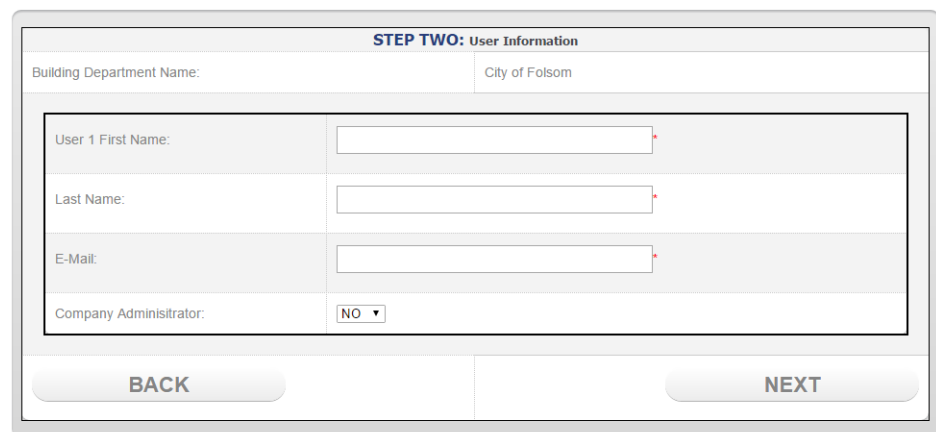


STEP ONE: Building Department Information

Building Department Name:	<input type="text" value="Not in the list"/>	City of <input type="text"/>
Building Department Address:	<input type="text"/>	
City/State/Zip:	<input type="text"/> / <input type="text" value="CA"/> / <input type="text"/>	
Phone:	<input type="text"/> - <input type="text"/> - <input type="text"/> - EXT <input type="text"/>	
Fax:	<input type="text"/> - <input type="text"/> - <input type="text"/>	
How many users need access?	<input type="text" value="1"/>	

NEXT

- Input the required information for **Step TWO** and Click **NEXT**:



STEP TWO: User Information

Building Department Name:	City of Folsom
---------------------------	----------------

User 1 First Name:	<input type="text"/>
Last Name:	<input type="text"/>
E-Mail:	<input type="text"/>
Company Administrator:	<input type="text" value="NO"/>

BACK **NEXT**

- Verify the information is accurate, input the required message for the **THIRD and FINAL** step and Click **REGISTER**:

STEP THREE: FINAL CONFIRMATION

Building Department Info:

City of Folsom 31 natoma Folsom, CA 95630 916-985-5555

User 1:

John BDepartment jbd@department.com HAS ADMINISTRATOR PERMISSIONS

Please verify you are a real person by typing the numbers and letters you see:

M8 K N M C

BACK REGISTER

- Once you have registered your Building Department, CalCERTS will verify the account and process the request. Once the request has been processed CalCERTS will email the users a login and password creation link.

Importance of Unique Registry Login

The CalCERTS Registry allows users to certify and register documents in accordance with California's Building Code. The registration process verifies each user's qualifications to certify documents and assigns each user a unique login to ensure the user's signature is protected. Once a user assigns his or her signature to a registered document the user is legally accountable for any consequences arising from the application of their signature.

To protect your signature, do not share your user name or password with anyone.

CalCERTS issues unique login information to Documentation Authors, support staff, and data entry personnel in addition to Responsible Parties. To request a unique username and password contact support@calcerts.com

All CalCERTS Raters and Registry Subscribers are required to protect their login and password, pursuant to the terms of their Subscriber Agreement. "Subscriber will be issued a secure login and password to the Registry. Subscriber may not provide their login and password to any person including, without limitation, a fellow employee or their employer. Subscriber shall report any unauthorized use of their login or password to CalCERTS immediately upon discovery."

Key Terms

- **Authorized Representative:** A representative designated by a Responsible Person that agrees to sign and register certificates on behalf of the Responsible Person.
- **Documentation Author:** The person who enters information on any compliance form becomes the Documentation Author for that form. Anyone with a registry account and with whom the project has been shared may act as the Document Author. There are no licensing or training requirements. The Documentation Author's signature signifies the truth and accuracy of information they have entered but it does not certify/register the document. The Responsible Person must review and sign the completed document before it will be certified/registered.
- **Responsible Person:** The person who certifies that the project (or trade) complies with all applicable requirements of the Building Energy Efficiency Standards
- **Certificate of Compliance (CF1R):** The CF1R is required at the time of permit application and certifies that the project as designed will comply with all applicable requirements of the Building Energy Efficiency Standards. Additionally, the CF1R documents the minimum efficiency specifications for building components and systems that must be installed. The CF1R is certified/registered by the Responsible Person for the project.
- **Certificate of Installation (CF2R):** CF2Rs are completed during the construction process and certify that the 'as-built' condition meets or exceeds the minimum efficiency specification documented on the CF1R and other applicable code requirements. Each installer should act as the Responsible Person for the CF2R form applicable to their trade though the Builder/General Contactor may also act as the Responsible Person.
- **Certificate of Verification (CF3R):** CF3Rs represent HERS verified measures that may have been triggered by the project work-scope and/or requirements of the CF1R. HERS verifications are conducted when installation of the associated building assembly or system has been completed. Only the HERS rater that performed the testing may act as the Responsible Person to certify/register a CF3R.




Feature Updates

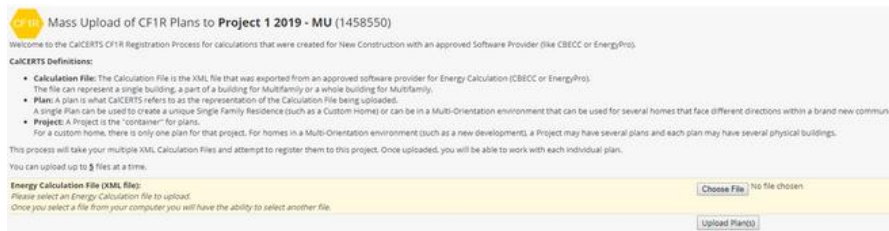
CF-1R Mass Upload.

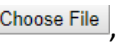

CalCERTS has implemented a feature to help users upload multiple CF-1Rs simultaneously; the process will take your multiple XML Calculation Files and process them at one time. Once uploaded, you will be able to work with each individual plan.

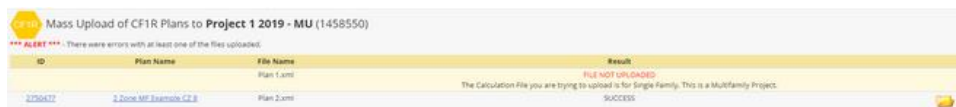
This feature is available for all code cycles in our registry and is located within New Construction Projects and the CF-1R Registration Bin.

To use this feature within a New Construction Project:



1. Access your project within www.calcerts.com
2. Click , located at the top of your Project Home page
3. Click , located towards the upper right of the Plans page
4. Click  Mass Upload
5. Here you can upload up to 5 CF-1Rs at a time:



6. Click , selecting one file at a time
7. Once all of your files have been chosen, Click 
8. You will be directed to the Mass Upload confirmation page. Here you can view the status of all files uploaded, both successful and unsuccessful uploads. A reason will display for any unsuccessful plans. You can click Actions, then click Mass Upload if needing to re-upload the correct file. (If only one file is uploaded, you will be directed to the home page of that plan.)



ID	Plan Name	File Name	Result
1234567	2 Zone MF Example CF 1	Plan 1.xml	FILE NOT UPLOADED The Calculation File you are trying to upload is for Single Family. This is a Multifamily Project.
		Plan 2.xml	SUCCESS

9. Click  to access the plan or use the navigation bar  to access other available sections of the project.

Compliance Forms

The California Energy Commission maintains the up-to-date list of all compliance forms for Residential and Nonresidential Building Projects. The list is located on the Commission's website at <http://www.energy.ca.gov>. The below hyperlinks are linked to the Commission's list of compliance forms.

- [2019 Residential Compliance Forms](#)
 - [Certificates of Compliance – CF1R Forms](#)
 - [Certificates of Installation – CF2R Forms](#)
 - [Certificates of Verification – CF3R Forms](#)
- [2016 Residential Compliance Forms](#)
 - [Certificates of Compliance – CF1R Forms](#)
 - [Certificates of Installation – CF2R Forms](#)
 - [Certificates of Verification – CF3R Forms](#)
 - [Alteration and Addition Forms](#)
- [2016 Nonresidential Compliance Forms](#)
 - [Certificates of Verification – NRCV Forms](#)
- [2013 Residential Compliance Forms](#)
 - [Certificates of Compliance – CF1R Forms](#)
 - [Certificates of Installation – CF2R Forms](#)
 - [Certificates of Verification – CF3R Forms](#)
 - [Alteration and Addition Forms](#)
- [2013 Nonresidential Compliance Forms](#)
 - [Certificates of Verification – NRCV Forms](#)

Setting Signature

- Registry users sign documents electronically. To sign documents, users must record their electronic signature. There are three options to record a signature: 1) Choose a Font Style; 2) Use Website Capture; or 3) Upload a Scanned Image of the Signature.
- Once a signature is recorded the user may proceed with signing documents.
- To record a signature, select the user's name located in the top right hand corner of the screen.



- Select the **My User Profile** link.
- Click **Settings**: select the **Click Here** link to the right of **My Signature**.

Your signature file has been approved.
To work with your signature: [\[Click Here\]](#)

- Next, select one of the three Signature Options: Font Style; Website Capture; or Scanned Image.

- **Option 1: Font Style**

A screenshot of a web form titled 'Signature Option: Font Style'. It contains a 'Name:' field with 'Johnny Rater' and a prompt 'Please select one of the following fonts:'. Below this are three radio button options, each with a sample signature: 'A: Johnny Rater', 'B: Johnny Rater' (which is selected), and 'C: Johnny Rater'. A 'Save Choice' button is located to the right of the options. At the bottom, a preview area shows 'Your APPROVED Signature looks like this:' followed by a large, stylized cursive signature of 'Johnny Rater'.

- Select your preferred Font Style and click **Save Choice**.

- **Option 2: Website Capture**

- Using the mouse, draw your signature in the website capture box.

The screenshot shows a web form titled "Signature Option: Website Capture". It includes a "Name:" field with the value "Johnny Rater". Below the name field is a large rectangular box for drawing a signature. Inside this box, the text "Using your mouse, draw your signature below:" is visible. A handwritten signature "Johnny Rater" is shown in the box. At the bottom left of the signature box, there are two buttons: "Clear" and "Save".

- Once completed, select **Save**.

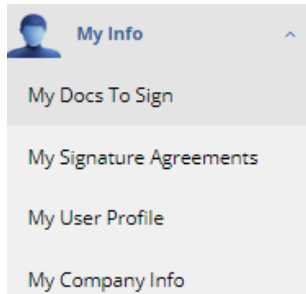
- **Option 3: Scanned Image**

- Upload a scanned copy of your signature. The scanned image must be a JPG file with a resolution of 72 DPI. Please note: this option must be manually reviewed and approved by CalCERTS. Turnaround time can take up to one business day.

The screenshot shows a web form titled "Signature Option: Scanned Image". It includes a "Name:" field with the value "Johnny Rater". Below the name field is a list of instructions: 1. [Download] Signature Form, 2. Scan your signature and save it as a JPG file (700 pixels wide by 200 pixels high and a resolution of 72 DPI), and 3. Upload it below. At the bottom, there is an "Upload File:" section with a "Choose File" button and the text "No file chosen". Below the "Choose File" button is an "Upload File" button.

Signature Agreements

- Signature Agreements allow users to delegate signature authority to Authorized Representatives. Under the 2008, 2016, and 2019 Standards, Responsible Persons may select Authorized Representative to sign and register certificates on their behalf. Agreements are kept on file to manage this delegated authority.
- To manage Signature Relationships, select **My Signature Agreements** from the **My Info** menu.



- **To Delegate Signature Authority**
 - Select **My Signature Agreements**.
 - Next, select the applicable Building Standards.

MY SIGNATURE AGREEMENTS

Signature Agreements allow users to delegate signature authority to Authorized Representatives. Under the 2008 and 2016 Standards, Responsible Persons may select Authorized Representatives to sign and register certificates on their behalf. Agreements are kept on file to manage this delegated authority

For what YEAR STANDARDS do you want to manage your Signature Agreements?

[2019 Code Standards](#)

[2016 Code Standards](#)

[2008 Code Standards](#)

- Select **Assign Signature Agreements**.

MY SIGNATURE AGREEMENTS

Signature Agreements allow users to delegate signature authority to Authorized Representatives. Under the 2008 and 2016 Standards, Responsible Persons may select Authorized Representatives to sign and register certificates on their behalf. Agreements are kept on file to manage this delegated authority

[\[Start Over\]](#)

2019 YEAR STANDARDS

Installation Certificate Signature Agreements:

CalCERTS Customer that can sign/approve on your behalf:

NONE

Users that have given YOUR COMPANY (DEV INSTALLERS &) permission to sign off/approve:

NONE

WHAT NEXT?

[Assign Signature Agreement](#)

- Input the customer identification number for the company that authority is to be delegated.

MY SIGNATURE AGREEMENTS

Signature Agreements allow users to delegate signature authority to Authorized Representatives. Under the 2008 and 2016 Standards, Responsible Persons may select Authorized Representatives to sign and register certificates on their behalf. Agreements are kept on file to manage this delegated authority

[\[START OVER\]](#) \ [\[Overview\]](#)

2019 YEAR STANDARDS

To give a Customer Signature Authority, please provide us with the Customer's ID at CalCERTS, Inc.

Customer ID:

Note: If you do not know the Customer number of the Authorized Representative, please contact them directly to obtain the number. CalCERTS cannot disclose Customer IDs.

- *If customer ID is not known, contact the customer directly. Each company has their own unique ID. The number is located under **My Info** then **My Company Info**. The ID is located at the top of the **My Company Info** page.*
- Select **GIVE AUTHORITY**.
- Next, review the Signature Authority Agreement.

MY SIGNATURE AGREEMENTS

Signature Agreements allow users to delegate signature authority to Authorized Representatives. Under the 2008 and 2016 Standards, Responsible Persons may select Authorized Representatives to sign and register certificates on their behalf. Agreements are kept on file to manage this delegated authority

[\[START OVER\]](#) \ [\[Overview\]](#)

2019 YEAR STANDARDS

CF-2R Signature Agreement

I, **Johnny Installer**, agree to allow **John Rater's HVAC in Folsom (CA)** to act as my Authorized Representative with delegated signature authority.

- I acknowledge that my Authorized Representative may sign Certificates of Installation (CF2Rs) on my behalf.
- I acknowledge that the legal responsibility for construction or installation in the applicable classification for the scope of work specified on the Certificate of Installation document(s) remains with me.
- I acknowledge that it is my responsibility to keep current my list of Authorized Representatives for which I have delegated signature authority.

☐ Check this box to agree.

***** ALERT ***** - A primary user for **John Rater's HVAC** MUST accept this request by confirming the following:

John Rater's HVAC agrees to act as an Authorized Representative with signature authority for **Johnny Installer**.

- I affirm that I have been authorized by **John Rater's HVAC** to enter into this agreement on behalf of **John Rater's HVAC**.
- I affirm that **John Rater's HVAC** agrees to act as an Authorized Representative.
- I acknowledge that it is responsibility of **John Rater's HVAC** to keep current the list of Responsible Parties for which **John Rater's HVAC** has accepted signature authority.

- Check the box to Agree.
- Select **GIVE AUTHORITY**.
- Next, an email will be sent to the targeted company to respond to the delegation of authority.

Signature Authority Request has been made. You will be notified when this is processed.

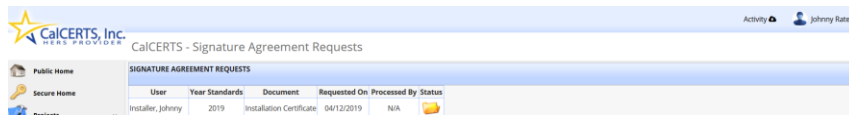
■ To Accept Signature Authority

- If a user has been delegated Signature Authority the user will receive an Alert Message.

YOU HAVE ALERTS

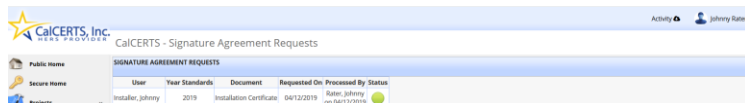
- You need to upload a Rater Card Photo. [Click Here](#)
- There are 2 Signature Authority Request(s) needing approval. [Click Here](#) to view.
- You have 9 requested Project transfer(s). [Click Here](#) to view.

- Select the **Click Here** link in the Alert Message to view delegated authority requests.
- Next, select the folder associated with the active request.



- Click **ACCEPT** or **DECLINE**.

- Once **Accepted** or **Declined**, a confirmation page will display the date the agreement was requested and processed.





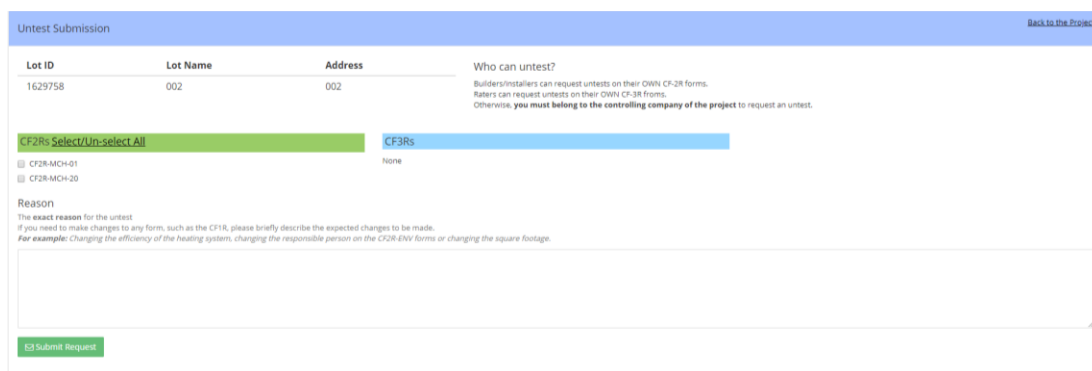
- Once completed, a PDF copy of the Signature Authority Agreement will be mailed to the parties of the Agreement.

My Industry Partners


- **My Industry Partners** are used to manage a user's relationships with other authorized users. Using **My Industry Partners** allows users to identify associated Builders/Architects, Energy Consultants/Designers, Installing Contractors, and/or Raters, so that projects can be easily shared or transferred. Certificates can be easily shared with users designated under **My Lists**.
- **Important:** The drop-down menus used to assign Responsible Parties to signature blocks are populated by the **My Lists** designations.
 - **My Builders/Architects** - This list contains Builders that may be assigned to projects or plans to complete CF1Rs and CF2Rs for new construction projects.
 - **My Energy Consultants/Designers** - This list contains Energy Consultants that may share or transfer projects and plans to complete CF1Rs.
 - **My Installers** - This list contains Installers that may be assigned projects to complete CF1Rs and CF2Rs for alterations and additions.
 - **My Raters** – This list contains Raters that may share or transfer projects and plans to complete the CF3Rs.

Making Corrections


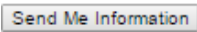
- To correct a form there are three options depending on the forms used and the type of correction needed. The three options are: **Edit**, **Untest**, or **Resubmit**.
 - To correct information on the Address or Permit Number or Building Department, the correction must be made by the company controlling the project by going to the project homepage and selecting the **Edit** link .
 - To correct information on a Certificate of Compliance (CF1R) when there are Certificates of Installation (CF2Rs) and/or Certificates of Verification (CF3Rs) on file, the correction must be an **Untest**.
 - Only the company controlling the project can submit an Untest.
 - To submit an **Untest**, Open the applicable CF1R, lot or address and select **Actions** then select **Submit Untest** .
 - Select the form to Untest and input the required information such as the reason for the Untest then select **Submit Request**.



The screenshot shows the 'Untest Submission' form. At the top, there's a blue header with 'Untest Submission' and a 'Back to the Project' link. Below the header is a table with columns: Lot ID, Lot Name, Address, and Who can untest?. The table contains one row with Lot ID 1629758, Lot Name 002, and Address 002. To the right of the table, there's a section titled 'Who can untest?' with instructions: 'Builders/installers can request untests on their OWN CF-2R forms. Raters can request untests on their OWN CF-3R forms. Otherwise, you must belong to the controlling company of the project to request an untest.' Below the table, there are two tabs: 'CF2Rs Select/Un-select All' (active) and 'CF3Rs'. Under the 'CF2Rs Select/Un-select All' tab, there are two checkboxes: 'CF2R-MCH-01' and 'CF2R-MCH-20'. Under the 'CF3Rs' tab, there is a 'none' option. Below the tabs, there's a 'Reason' section with a text area for input. At the bottom, there is a green 'Submit Request' button.

- To correct Certificates of Installation (CF2Rs) or Certificates of Verification (CF3Rs) use the **Resubmit** process. Select the **Resubmit** icon  next to any measure that needs correction, fill in the correct information, provide the reason for the resubmission, and select **Submit**.

Recover or Reset Password

- Visit www.calcerts.com
- Click **Forgot Login** 
- Input your email address or Username.
- Click **Send Me Information** 
- *If you have forgotten the email address you registered with or no longer have access to that email address please contact support@calcerts.com directly.*
- Click **OK** to confirm a reset key has been emailed to you. *Depending on your browser you should see a similar confirmation below.*

www.calcerts.com says:

A reset key has been e-mailed to you. Please check your e-mail. If you do not receive the e-mail in 15 minutes, check your SPAM folder.

OK

- *The email will display Your Username and provide a Password Reset link.*
- Click the link to proceed with creating a new password.

Dear John Smith,

You are receiving this e-mail because either you or CalCERTS has initiated a new password request.

Your Username: **JSmith**

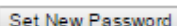
Please click on the link below to register your password.

Click This Link:

https://www.calcerts.com/login_reset.cfm?pk=2141&reset=%2FhT9mDs%2FmDfOksezt%3D

If clicking on the link does not work, copy and paste it into your browser.

- Follow the password requirements listed.
- Input your new password. Verify the new password and Click **Set New Password**



Reset Password

Your Username: **JSmith**

Password Requirements:

- * 5 to 20 characters in length
- * At least one letter AND one number
- * No Spaces are allowed
- * Is not similar to your Login or name

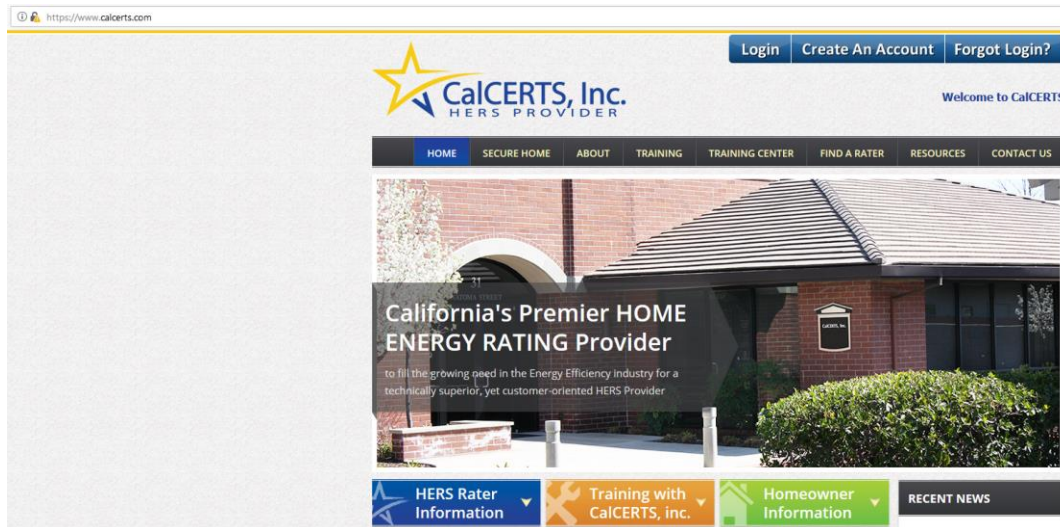
New Password:

Verify New Password:

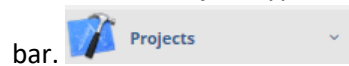


Getting Started

- To begin a project, select **Login** to access the CalCERTS Registry through the CalCERTS Website.



- Once within the Registry, choose a **Project Type** and a set of **Standards**
 - To choose a Project Type select the **Projects** Dropdown located on the left side menu

























- Next select the Project Type from the drop down menu.
 - Project Types Include:
 - **New Construction – Residential**
 - **New Construction - Non-Residential**
 - **Alterations – Residential**
 - **Alterations Non-Residential**
 - **Home Energy Ratings**



New Construction – Residential Projects:

- Select the **New Project** icon 
- Select the **New Project** icon  once more to indicate what Standards you are working with.

Project Type	Year Standards				
	2005	2008	2013	2016	2019
- Single Family Residence (SFR) - Multi-Orientation (Subdivision, Planned Neighborhood, etc) <i>Performance Calculation File ONLY</i> ?					
- Single Family Residence (SFR) - SINGLE ADDRESS (Custom Home - Single Orientation, Single Lot, etc) <i>Performance Calculation File or Prescriptive CF1R-NCB-01</i> ?					
- Single Family Residence (SFR) - SINGLE ADDRESS ADDITION ONLY <i>Performance Calculation File or Prescriptive CF1R-ADD-01</i> ?	N/A	N/A			
- Multi-Family Residence (MFR) <i>Performance Calculation File ONLY</i> ?					
- Multi-Family Residence (MFR) - SINGLE BUILDING PRESCRIPTIVE ONLY <i>Prescriptive CF1R-NCB-01 OR CF1R-ADD-01</i> ?	N/A	N/A			

- For Additions under this Project Type, Select the **New Project** icon  for project type **SFR – SINGLE ADDRESS ADDITION ONLY**.
- Next, input the required information.

New 2019 New Construction SINGLE FAMILY RESIDENCE SINGLE ADDRESS Project

Project Name:

Project Type:


Zip Code: Required before ANY CF1R can be issued.

Default Gas Utility:

Default Electric Utility:

- Select Create Project

Alterations – Residential Projects

- Select the **New Project** Icon  under the appropriate year standards.
- Next, select the option that applies to you:

Create Alteration Project

In order to get you to the right place, we need to know if you have a permit already or not. The date you start a permit determines the Energy Standards Code Year, which in turn dictates what rules and forms apply.

IF YOU HAVE A PERMIT ALREADY

What is your PERMIT ISSUE DATE?
04/17/2019

Note: dates before 07-01-2014 fall under the 2008 Energy Standards Code Year

IF YOU DO NOT HAVE A PERMIT ALREADY

QUICK LINKS

[\[CLICK HERE\] for 2019 Energy Standards Code Year](#)
[\[CLICK HERE\] for 2016 Energy Standards Code Year Using Fast-Track](#)
[\[CLICK HERE\] for 2016 Energy Standards Code Year](#)
[FAST-TRACK USER'S GUIDE](#)
[\[CLICK HERE\] for 2013 Energy Standards Code Year](#)

- Any permit dates after 1/1/2020 will fall under the 2019 Code Standards.

Create Alteration Project

2019 Standards
***** ATTENTION ***** Check with your local code enforcement agency for what Standards to be using.
The effective date for 2019 Code Standards is 1/1/2020.

Project Type	2019 Code Standards	Fast Track Process
- Prescriptive Residential Alterations CF1R-ALT-01 (Whole House)		
- Prescriptive Residential Alterations (Space Conditioning Systems) CF1R-ALT-02 <i>This is the most common project type for HVAC systems Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.</i>		
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to New Construction .		
- Consumer Certificate (Only for HERS Verification - DO NOT USE THIS OPTION IF YOU NEED A CF1R OR NEED TO REGISTER CF2Rs)		

- Select the **Residential Alterations** icon once more to indicate the Project Type.
- The most common Project Type under Residential Alterations is **Prescriptive Residential Alterations** which uses the ALT-02. Select this Project Type for Alterations, Replacements or Change-outs of HVAC systems in an existing building.

- Prescriptive Residential Alterations (Space Conditioning Systems)
CF1R-ALT-02
*This is the most common project type for HVAC systems
Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.*

- For Prescriptive Residential Alterations under this Project Type, Select the **New Project** icon for Prescriptive Residential Alterations CF1R-Alt-01 (Whole House.)
- Next, input the required project information.

Create New 2019 Prescriptive Approach Alteration Project

Project Name:

Street Address:

Zip Code: Must be a valid integer
Must be a valid zip code.

City:

Enforcement Agency / Building Department:


Project Type:

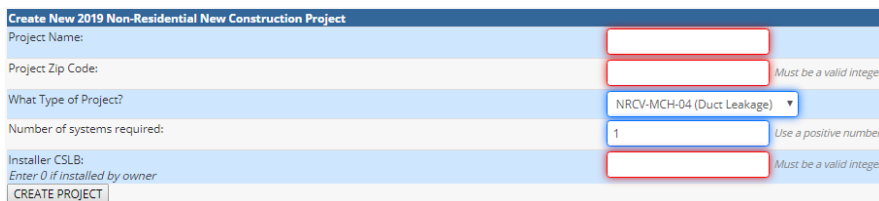
NOTE: For projects that consist of HVAC alterations/changeouts ONLY, and NO OTHER building alterations - use the [CF1R-ALT-02](#) form.

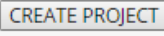
CREATE PROJECT

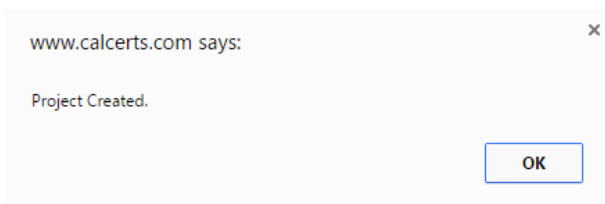
- Select **Create Project**.

New Construction – Non-Residential Projects


- Click the **New Project – Non-Residential** icon .
- Here you will input required information such as Project Name, Zip Code, and CSLB License.

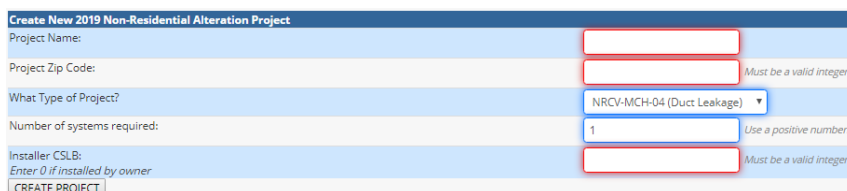


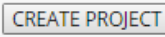
- Select **CREATE PROJECT** .
- Select **OK** to confirm your project has been created.

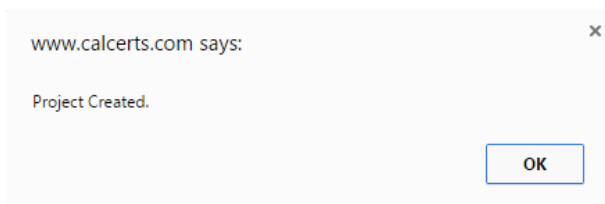


Alterations – Non-Residential Projects


- Click the **New Project – Non-Residential** icon .
- Here you will input required information such as a CSLB License number, Project Name, and Zip Code.

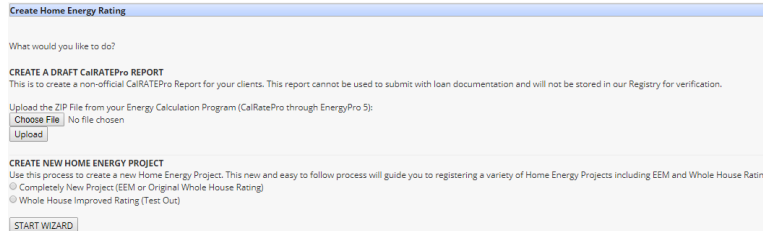


- Select **CREATE PROJECT** .
- Click **OK** to confirm your project has been created. *Depending on your browser you should see a similar confirmation below.*



Home Energy Ratings

- Click the **New Project Create Home Energy Rating** icon .
- Choose the option that applies to you



It is important to note the difference between Single Family Residential (SFR) projects and Multi-Family Residential (MFR) projects.


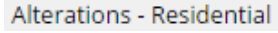

Single family homes, duplexes and townhouses shall be treated as Single Family Residential (SFR) for the purpose of compliance modeling and registry project types. Other low-rise residential buildings shall be treated as Multi-Family Residential (MFR).

For the performance compliance approach, the project scope and occupancy defined in the compliance model must be matched by the project type created in the registry to which you intend to upload those calculations.

- *A townhouse is a single-family dwelling unit constructed in a group of three or more attached units in which each unit extends from the foundation to roof and with open space on at least two sides. A townhouse may have common walls on either side but may not have common ceilings/floors. A duplex is a special case of a townhouse that may be configured to have a common wall or floor/ceiling.*
- *A duplex or townhome (an R-3 occupancy) must be modeled as multiple single-family buildings. Each dwelling unit will be a separate input file rather than modeling a building with multiple dwelling units.*

Sample Projects

Residential Alterations

- Click the **Projects** link  located on the left side menu bar.
- Click the **Alterations- Residential** link .
- Click the **New Alteration Project** icon .
- Note:** The icon will be located in the upper right of the screen. The green plus symbol is a universal icon for anything new within the section of the site you are accessing.
- Note:** You can hover over any of the icons in order for the verbiage of what the icon is to prompt.
- Select the option that applies to you:

Create Alteration Project

In order to get you to the right place, we need to know if you have a permit already or not. The date you start a permit determines the Energy Standards Code Year, which in turn dictates what rules and forms apply.



IF YOU HAVE A PERMIT ALREADY

What is your PERMIT ISSUE DATE?
09/26/2019 NEXT
Note: dates before 07-01-2014 fall under the 2008 Energy Standards Code Year


IF YOU DO NOT HAVE A PERMIT ALREADY

QUICK LINKS

2019 Energy Standards Code Year:
[CLICK HERE](#) for CF1R-ALT-01, CF1R-ALT-02, Consumer Certificate or Performance Alteration (E+A+A)





2016 Energy Standards Code Year:
[CLICK HERE](#) for CF1R-ALT-02 Using Fast-Track 
[CLICK HERE](#) for CF1R-ALT-01, CF1R-ALT-02, Consumer Certificate or Performance Alteration (E+A+A)
[FAST-TRACK USER'S GUIDE](#) 


2013 Energy Standards Code Year:
[CLICK HERE](#) for CF1R-ALT-01, CF1R-ALT-02, Consumer Certificate or Performance Alteration (E+A+A)

- Click the **New Project** icon  located to the right of **Prescriptive Residential Alterations CF1R-ALT-02** for Project Type.


Create Alteration Project

2019 Standards
***** ATTENTION ***** Check with your local code enforcement agency for what Standards to be using.
The effective date for 2019 Code Standards is 1/1/2020.

Project Type	2019 Code Standards
- Prescriptive Residential Alterations CF1R-ALT-01 (Whole House)	
- Prescriptive Residential Alterations (Space Conditioning Systems) CF1R-ALT-02 <i>This is the most common project type for HVAC systems</i> <i>Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.</i>	
- Performance Residential Existing with Addition/Alteration (EAA) <i>If you need an ADDITION ONLY project, please go to New Construction.</i>	
- Consumer Certificate <i>(Only for HERS Verification - DO NOT USE THIS OPTION IF YOU NEED A CF1R OR NEED TO REGISTER CF2Rs)</i>	

- Input the required information for Step 1 and Click **NEXT** link .

➤ STEP 1 / STEP 2 / STEP 3 / STEP 4

A. GENERAL INFORMATION 

Installer (This list comes from your [My Installers list](#))

Project Name

Street Address

Zip Code

City

Enforcement Agency / Building Department


Building Type


Square Footage

Climate Zone



Number of space conditioning (SC) systems

IF MORE THAN ONE SYSTEM, will ALL of these systems be IDENTICAL?



- Input the required information for Step 2 and Click **NEXT** link .

[STEP 1](#) / ➤ STEP 2 / STEP 3 / STEP 4

B. Space Conditioning (SC) System Information

SC System 1

01 System Name

02 System Area Served

03 Floor Area served by System

04 Is the SC system a ducted system?



05 Installing a refrigerant containing component?


06 Installing new SC System components?

07 Installing more than 40 feet of ducts
OR Installing ANY length of duct with a new or complete replacement SC system?



08 Installing entirely new duct system?

09 Installing entirely new SC system?

- Input the required System information for Step 3 and Click **NEXT** link .
- The information required on Step 3 varies from the Step 2 selections.*



[STEP 1](#) / [STEP 2](#) / ➤ STEP 3 / STEP 4


 

SYSTEM EXEMPT

01 SC System ID/Name

02 SC System Description of Area Served

- Visually confirm your information is accurate. Click the drop down to select the **Responsible Person** and **Company Name** for Step 4 and Click the **SUBMIT** link .

[STEP 1](#) / [STEP 2](#) / [STEP 3](#) / [STEP 4](#)

[BACK](#) [SUBMIT](#)

FINAL REVIEW

A. GENERAL INFORMATION

01 Installing Contractor:	DEV INSTALLERS & (137345)	02 Enforcement Agency:	City of CalCERTSville
03 Project Name:	Natoma Residence	04 Date Prepared:	2019-09-28
05 Project Location:	31 Natoma	06 Building Type:	SF
07 CA City:	CalCERTSville	08 Dwelling Unit Name:	Natoma Residence
09 Zip Code:	00000	09 Dwelling Unit CFA (R2):	1200
10 Climate Zone:	1	10 Number of SC Systems:	1

B. Space Conditioning Information

SC System	SC System Location or Area Served	CFA served by this SC System (R2)	Is the SC system a ducted system?	Installing a refrigerant containing component?	Installing new SC System components?	Installing more than 40 feet of ducts?	Installing entirely new duct system?	Installing entirely new SC system?	Alteration Type
System 1	Location 1	1200							System is exempt from the alteration requirements

AUTOMATICALLY TRANSFER TO A HERS RATER

If you would like to automatically send out a Transfer Request to a Rater upon registration of this project, please select from list:

[TBD](#)

DOCUMENTATION AUTHOR

Documentation Author Name: Johnny Installer
 Documentation Author Company Name: DEV INSTALLERS &
 CEAH/HERS Certification Identification (if applicable):

RESPONSIBLE PERSON

Responsible Company Name: DEV INSTALLERS &
 Responsible Designer Name: Installer, Johnny
 License: 123456

[BACK](#) [SUBMIT](#)

- Click the **PDF** icon to review the unofficial CF1R and close once it has been reviewed.
- Click the **check box** ☐ **Check to Select** to certify you have reviewed and approve the PDF document.

[Project Home \(ID: 1453101\)](#) / Prescriptive CF1R

Plan ID: 2741113
 CEC Registration #: 219-A020209117A

[Prescriptive CF1Rs](#)

Form Title	Form Name	CF1R Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
Alterations to SC	CF1R-ALT-02	Complete	DONE	Download 	<input type="checkbox"/> Check to Select	Johnny Installer (DEV INSTALLERS &)	Johnny Installer (DEV INSTALLERS &)
Hydronic Heating System Worksheet (System 1)	CF1R-PLB-01	Not Required	Not Required	Refresh PDF 			

***** ALERT ***** There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the "Check to Select" box, you are certifying that the content in the PDF is complete and accurate. Click "Approve PDFs" to approve all documents that you have selected with "Check to Select" box.

[Approve PDFs](#)

- Click **APPROVE PDFs** link [Approve PDFs](#).
- Note:** If the Responsible Person is different from the Documentation Author, both parties will have to log in and sign in order.


[Project Home \(ID: 1453101\)](#) / Prescriptive CF1R

Plan ID: 2741113
 CEC Registration #: 219-A020209117A

[Prescriptive CF1Rs](#)

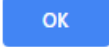
Form Title	Form Name	CF1R Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
Alterations to SC	CF1R-ALT-02	Complete	DONE	Download 	Signed	Johnny Installer (DEV INSTALLERS &) Signed 09-26-19	Johnny Installer (DEV INSTALLERS &) Signed 09-26-19
Hydronic Heating System Worksheet (System 1)	CF1R-PLB-01	Not Required	Not Required	Refresh PDF 			

- Click the **PDF** icon to access the official CF1R and close once complete.
- Click **Assign a HERS Rater** [Assign a HERS Rater](#) if you have not already assigned a HERS Rater for the project.
- Note:** If you do not yet know who your HERS Rater is you can skip this step until you are ready for the CF3Rs to be registered.

- Click the drop down to select a Rating Company and Click **SELECT** .




Select a Rater from your My List and click "Select" button:

Rater not in your list? [\[Click Here\]](#) to update your list

- Click **OK**  to confirm the request has been made.
- Note:** You have the option to **Assign a DIFFERENT HERS Rater** [Assign a DIFFERENT HERS Rater](#) up until the current Rating Company selected accepts the TRANSFER.

What's next?

- A request to assign project to CalCERTS, Inc. Exists. [Assign a DIFFERENT HERS Rater](#)
- [Navigate to the Project Home Page - ID: 1129925](#)



- Click **Navigate to the Project Home Page** [Navigate to the Project Home Page](#).
- Input the required Project Home information and Click **SAVE** .
 - Permit Number and Permit Date.
 - Home Owner's name and phone number.
- Click **OK**  to confirm the information has been Saved.
- Note:** The company controlling the project can Click **Edit**  if needing to modify the project home information available for edit.




- Click directly on the **CF2R** link located at the top of your Project Home page.
- Click the **Report Results** link [Report Results](#) for the CF2R-MCH-01b.




Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF3R Status
1453101	Natoma Residence	1716296	System 1	31 Natoma		T24: Working [View PSB]	T24: Complete [View PSB]

<div> <input type="button" value="Not Complete"/> <input type="button" value="Need Signature"/> <input type="button" value="Completed"/> </div>									
System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
		Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01	Not Started	Report Results				

- Input CF2R Results; Click **NEXT**  or **BACK**  to navigate through the pages.
- On the final page Click the drop down to select the **Responsible Builder/Installer Name** and **Company Name** and input the Position With Company.


RESPONSIBLE PERSON	
Responsible Builder/Installer Name	Installer, Johnny
Company Name	DEV INSTALLERS &
Position With Company:	

- Click the **SUBMIT** link [SUBMIT](#).
- Note:** Once you input the calculations for the CF2R-MCH-01-H the database takes that information provided and displays all the required documents.
- Note:** You can proceed with inputting the remaining CF2Rs by Clicking [Report Results](#) located to the right of the CF2R or Pay for the current CF2R-MCH-01-H on file by Clicking the Pay icon .

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF3R Status		
798135	Natoma Residence	890461	System 1	31 Natoma Street		T24: Working	T24: Working		
TAB VIEW 									
System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
1117535	System 1	Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01-H	PDF Needs Approval 	Payment Required			Johnny Installer (DEV INSTALLERS &) Needs to Sign	Johnny Installer (DEV INSTALLERS &) Needs to Sign
1117535	System 1	Duct Leakage	CF2R-MCH-20	Not Started	Report Results				

- Click the **Report Results** link [Report Results](#) located to the right of the CF2R you would like to access.
- Input CF2R Results; Click **NEXT** [NEXT](#) or **BACK** [BACK](#) to navigate through the pages.
- On the final page, Click the drop down to select the **Responsible Builder/Installer Name** and **Company Name** and input the Position With Company.

RESPONSIBLE PERSON	
Responsible Company Name	DEV INSTALLERS &
Responsible Builder/Installer Name	Installer, Johnny
Position With Company	Installer

 **QUICKPAY**
***** ALERT ***** The registration of this document will require payment before printing.
 There will be a \$1.00 charge for this registration.
 If you wish to **QUICKPAY** for this certificate, check this box:
 I, Johnny Installer, authorize CalCERTS to apply the total of \$1.00 against my DEV INSTALLERS & Account. ☐ No ☐ Yes


Charge Me Later: Charge per my CalCERTS Invoice Agreement:
CURRENT AGREEMENT: This transaction TOTAL will be added to your Batch Invoicing that will be automatically charged against your credit card on file at close of day.

***** ALERT ***** - CREDIT CARD NOT ON FILE!!! Please [register a Credit Card](#) in order to be able to use this option.

Pay on Account:
 Deduct total from the Credit Account of DEV INSTALLERS &. ☐

[BACK](#) [SAVE](#)

On Submission Go To:
 CF2R Launch Page

- Click the **Submit** link [SUBMIT](#).
- Click the **Pay** icon  located to the right of any of the CF2Rs.
- Follow the prompts in the shopping cart to proceed with payment.
- Choose the appropriate payment type.
- Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.

THANK YOU!!! [\[CLICK HERE\]](#) to return to the page you came from.


The transaction is completed.

An e-mail has been sent to jinstaller@calcerts.com. You may also print this page as a receipt.

A Payment of \$1.00 was charged against your Credit Account by Johnny Installer.

Credit Account Information	
Invoice Number:	2622669
Order Date:	4/23/2019 11:16 PST
Starting Balance:	\$4,080.00
Amount on Invoice:	\$1.00
New Balance:	\$4,079.00

Description	Unit Price	QTY	\$
Installation Certificate: 31 Natoma (PROJECT ID: 1384945 LOT ID: 1627599) (Space Conditioning Systems, Ducts and Fans)	\$1.00	1	\$1.00
TOTAL			\$1.00

- Click the [\[CLICK HERE\]](#) link to return to the page you came from.
- Note:** You can proceed with inputting the remaining CF2Rs by Clicking **Report Results** [Report Results](#) located to the right of the CF2R or Approve the current CF2Rs on file by Clicking the **check boxes** ☐ [Check to Select](#) and Clicking **Approve PDFs** [Approve PDFs](#).
- Note:** Click the **PDF** icon  to review any documents before approving them.
- Click the **check boxes** ☐ [Check to Select](#) to the right of the CF2Rs located under Document Status.

Project ID

Project Name

Lot ID

System

Address

Sample Group

Overall CF2R Status

Overall CF3R Status

1384945

Natoma Residence

1627599

System 1

31 Natoma

T24: Working [\[View PDF\]](#)

T24: Working [\[View PDF\]](#)





*** ALERT ***

There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the 'Check to Select' box, you are certifying that the content in the PDF is complete and accurate. Click 'Approve PDFs' to approve all documents that you have selected with 'Check to Select' box.

Select All PDF Documents to Sign

Approve PDFs

[\[Task View\]](#)


System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
		Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01	PDF Needs Approval 		<div><div>Download</div><div></div><div>Refresh PDF</div></div>	<input checked="" type="checkbox"/> Check to Select	Johnny Installer (DEV INSTALLERS &)	Johnny Installer (DEV INSTALLERS &)
4549269	System 1	Refrigerant Charge	CF2R-MCH-25	PDF Needs Approval 	CF3R	<div><div>Download</div><div></div><div>Refresh PDF</div></div>	<input checked="" type="checkbox"/> Check to Select	Johnny Installer (DEV INSTALLERS &)	Johnny Installer (DEV INSTALLERS &)

*** ALERT ***

There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the 'Check to Select' box, you are certifying that the content in the PDF is complete and accurate. Click 'Approve PDFs' to approve all documents that you have selected with 'Check to Select' box.

Select All PDF Documents to Sign

Approve PDFs

- Click **Approve PDFs** link [Approve PDFs](#).
- Note:** Next you can Sample if applicable. This is an optional step and only applies to projects needing Sampling.
- Click directly on the **Sample** link  located at the top of your Project Home page.
- Click the default ☐ **No** to ☒ **Yes** in order to select the projects you would like to associate.
- Note:** The current project you have open will automatically be included in the sample group.

Project ID	Project Name	Address	System Name	City	Zip	Group	Sample
371101	42031 VILLAGE 42	JEANNINE & STEVEN RYAN	SYSTEM 1	Camarillo	93012		<input type="button" value="Yes"/>
373990	850 COLD CANYON RD	LINDA KOVAR	SYSTEM 1	Calabasas	91302		<input type="button" value="No"/>

- Click the **NEXT** link .


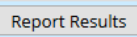


Project ID	Project Name	Address	System Name	City	Zip
371101	42031 VILLAGE 42	JEANNINE & STEVEN RYAN	SYSTEM 1	Camarillo	93012
769508	451 23rd Street	ANTHONY HEARN	System 1	Santa Monica	90402

- Click the **CREATE GROUP** link .

- Click **OK**  to confirm group has been created.

- Note:** Next the CF3Rs can be registered.



- Click directly on the **CF3R** link  located at the top of your Project Home page.
- Click the **Report Results** link  located to the right of the CF3R you would like to submit.
- Input CF3R Results; Click **NEXT**  or **BACK**  to navigate through the pages.
- On the final page, Click the drop down to select the **Responsible Rater Name** and **Company Name**.

RESPONSIBLE PERSON	
Responsible Rater Name	<input type="text" value="Rater, Johnny (USR999999)"/>
HERS Rater Company Name	<input type="text" value="CalCERTS, Inc."/>

- Click the **SUBMIT** link .
- Note:** Next you can input any remaining CF3Rs by Clicking **Report Results** .

CF3R

Please select the CF3Rs to complete below.

Project Systems being reported:

Project ID	Project Name	Lot ID	Address	Sample Group	Overall CF2R Status	Overall CF3R Status
767158	Mizo Residence	854160	31 Natoma St (System 1)		T24: Working	T24: Working

Linked Project(s)


Project ID	Project Name	System Name
726072	Mizo Residence	System 2


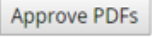

ITAB VIEW

?

Features of Project Systems being reported:


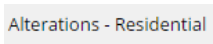

Tested Feature	Form Name	Tested System	CF2R Status	CF3R Status	Next Step	Untest	Document	Document Status	Documentation Author	Responsible RATER
Existing Conditions	CF3R-EXC-20	31 Natoma St (System 1)	N/A	Complete	Done		[Link To Data Array] SHOW XML Errors	Signed	Johnny Rater (CalCERTS, Inc.) Signed 03-30-16	Johnny Rater (CalCERTS, Inc.) Signed 03-30-16
							Download Refresh			
Duct Leakage	CF3R-MCH-20	31 Natoma St (System 1)	DONE	Not Started	Report Results	N/A				
IAQ and MV	CF3R-MCH-27	31 Natoma St (System 1)	REQUIRED	Not Started	Complete all CF2Rs first	N/A				

- Click the **Pay** icon .
- Follow the prompts in the shopping cart to proceed with payment.
- Choose the appropriate payment type.

- **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.
- Click the **check box**  [Check to Select](#) located under Document Status.
- Click **Approve PDFs** .
- **Note:** Click the **PDF** icon  to access the official registered CF3Rs.

Existing Buildings with Additions/Alterations

Note: Only certified Whole House HERS Raters can register a CF3R-EXC-20.

- Click the **Projects** link  located on the left side menu bar.
- Click the **Alterations - Residential** link .
- Click the **New Alteration Project** icon .
- Select the option that applies to you:

Create Alteration Project

In order to get you to the right place, we need to know if you have a permit already or not. The date you start a permit determines the Energy Standards Code Year, which in turn dictates what rules and forms apply.

IF YOU HAVE A PERMIT ALREADY

What is your PERMIT ISSUE DATE?
04/15/2019 [NEXT](#)


Note: dates before 07-01-2014 fall under the 2008 Energy Standards Code Year

IF YOU DO NOT HAVE A PERMIT ALREADY

[CLICK HERE](#)





QUICK LINKS

[\[CLICK HERE\]](#) for 2019 Energy Standards Code Year
[\[CLICK HERE\]](#) for 2016 Energy Standards Code Year Using Fast-Track
[\[CLICK HERE\]](#) for 2016 Energy Standards Code Year
[FAST-TRACK USER'S GUIDE](#)
[\[CLICK HERE\]](#) for 2013 Energy Standards Code Year

- Click the **New Project** icon  located to the right of the **Performance Residential Existing with Addition/Alteration (EAA)** Project Type.

Create Alteration Project

2019 Standards
***** ATTENTION ***** Check with your local code enforcement agency for what Standards to be using.
The effective date for 2019 Code Standards is 1/1/2020.

Project Type	2019 Code Standards
- Prescriptive Residential Alterations CF1R-ALT-01 (Whole House)	
- Prescriptive Residential Alterations (Space Conditioning Systems) CF1R-ALT-02 <i>This is the most common project type for HVAC systems Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.</i>	
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to New Construction .	
- Consumer Certificate (Only for HERS Verification - DO NOT USE THIS OPTION IF YOU NEED A CF1R OR NEED TO REGISTER CF2Rs)	

- Note:** If you need an ADDITION ONLY project, please register your project under **New Construction Residential**.
- Input the required project information:

Create New 2019 Performance Approach E+A Project

Project Name:


Street Address:

Zip Code: Must be a valid integer

Must be a valid zip code.

City:

Enforcement Agency / Building Department:

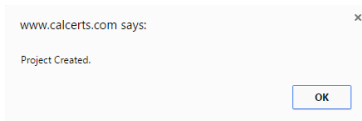
Project Type:  Single Family Per CEC, Multi-Family EAA projects must be calculated as Single Family Residence to comply.



NOTE: For projects that consist of HVAC alterations/changeouts ONLY, and NO OTHER building alterations - use the [CF1R-ALT-02 form](#).






NOTE: If this is an **ADDITION ONLY** Project, you must create it in [New Construction](#)

[CREATE PROJECT](#)


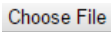

- Click **CREATE PROJECT** .
- Click **OK** to confirm the project has been created.



- Input the required Project Home information, this information must be input before the CF2Rs are started:
 - Click the **Edit** icon  in order to input the Contractor CSLB (If working with a Home Owner, select the check box).
 - Permit Number and Date.
 - Homeowner Name and Phone Number.
 - Click **SAVE** .
- Click **OK** to confirm the information has saved.

2016 Code Alterations Project	
Contractor:	DEV INSTALLERS & (137345) 
Project Type:	Single Family
Project Name:	Mizo Residence - System 1 (ID: 950512)
Project Address:	31 Natoma St 
Project City/State/Zip:	Folsom, CA 95630 
Company Controlling Project:	CalCERTS, Inc.
Building Department:	City of Folsom 
Permit Number/Date:	123456 - 01/31/2017 <small>Permit # and Permit Date is Required BEFORE CF-2Rs can be registered</small>
Status:	Active 
Homeowner Name:	Bob Owner
Homeowner Phone:	916-555-5555
Alternate Phone Number:	




- Click directly on the **CF1R** link  located at the top of your Project Home page.
- **Note:** The page will automatically default to the Energy Calculation File tab and the option of Choose File or Browse will depend on what browser you're using.
- Click the **Choose File** link  OR Click the **Browse** link .


Performance CF1R

Plan ID:	1153568
CEC Registration #:	216-A0100117A-000000000-0000

[Energy Calculation File](#)
[Tests](#)
[System Names](#)
[Sign Off](#)

 No file chosen

Please select an Energy Calculation file to upload.



- Locate the .xml file and Click the **Save Changes** link [Save Changes](#).
- Click **OK** to confirm your Plan has been uploaded.
- **Note:** The page will automatically default to the Sign Off tab and the option of Choose File or Browse will depend on what browser you're using.

If the Project requires a CF3R-EXC-20, the form must be completed by a HERS Rater before the CF1R can be finalized. The CF3R-EXC-20 is required to verify the values entered into the CF1R.

- **Note:** If the project WAS NOT created by the HERS Rater or NOT currently controlled by the HERS Rater you can **TRANSFER** the project to the HERS Rater by:
 - Click the **Actions** link [Actions](#) located in the upper right of the project.
 - Click **Transfer Project** [Transfer Project](#).
 - Click the drop down to select a Rating Company from your list.
 - **Note:** If you do not see the company in your list Click the **My Raters** [My Raters](#) link.
 - **Note:** The check box, in order to maintain shared access, will automatically be checked.
 - Click **Transfer** [Transfer](#).

- **Note:** Once you have transferred the project you will receive a confirmation page as shown below. The Transfer will not be complete until the receiving company logs in and ACCEPTS the TRANSFER.

Project Transfer Result:

Transfer Request Status:

Project: [Natoma Residence EAA \(ID: 1129984\)](#)

From: DEV INSTALLERS &

To: CalCERTS, Inc.

Request is still open. Waiting for [CalCERTS, Inc.](#) to accept.

To view any other Open Requests: [Click Here](#)

Return to the Project Home Page for Natoma Residence EAA [Click Here](#)

- Click on your project name highlighted in blue which will take you back to the project home page and use the Project Roadmap to navigate.



- Click directly on the **CF1R** link located at the top of your Project Home page.
- Click the [\[CLICK HERE\]](#) link to record the CF3R-EXC-20 under the Sign Off tab.
- Input the CF3R-EXC-20 Results; Click **NEXT** [NEXT](#) or **BACK** [BACK](#) to navigate through the pages.
- On the final page Click the drop down to select the **Responsible Rater Name** and **Company Name**.

RESPONSIBLE PERSON	
Responsible Rater Name	<input type="text" value="Rater, Johnny (USR999999)"/>
HERS Rater Company Name	<input type="text" value="CalCERTS, Inc."/>

- Click **SUBMIT** [SUBMIT](#).
- **Note:** Once the CF3R-EXC-20 has been submitted, the Registry will default to the CF3R page.

Please select the CF3Rs to complete below.

Project ID	Project Name	Lot ID	Address	Sample Group	Overall CF3R Status	Overall CF3R Status
787338	Mtso Residence	854188	31 Natoma St (System 1)		T24: Working	T24: Working


Project ID	Project Name	System Name
728078	Mtso Residence	System 2

Features of Project Systems being reported:

Tested Feature	Form Name	Tested System	CF3R Status	CF3R Status	Next Step	Document	Document Status	Documentation Author	Responsible Rater
Existing Conditions	CF3R-EXC-20	31 Natoma St (System 1)	N/A	Complete	Payment Required			Johnny Rater (CalCERTS, Inc.)	Johnny Rater (CalCERTS, Inc.)
WQ and MV	CF3R-MCH-27	31 Natoma St (System 1)	REQUIRED	Not Started	Complete all CF3Rs first				

- **Note:** The next step is to proceed with payment for the CF3R-EXC-20. Any users with access to the project may submit payment for any of the items available.
- Click the **Pay** icon .
- Follow the prompts in the shopping card to proceed with payment.
- **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.
- Click the [\[CLICK HERE\]](#) to return to the page you came from.

- **Note:** The next step is to sign the documents. First the Documentation Author must sign and then the Responsible Rater can sign.

 Please select the CF3Rs to complete below.

Project Systems being reported:

Project ID	Project Name	Lot ID	Address	Sample Group	Overall CF3R Status	Overall CF3R Status
727135	Mize Residence	854160	31 Natoma St (System 1)		T24: Working	T24: Working

Linked Project(s)

Project ID	Project Name	System Name
727023	Mize Residence	System 2

*** ALERT *** - PDF document that to be reviewed and approved. Please be sure to download the PDF, and review it. If the information is complete and accurate check the box of the PDF you approve and click the "Approve PDF" button below.

If the information is NOT correct, click on the RESUBMIT Link to correct the information. By checking each box, you certify that the content in the PDF is accurate and complete.

[Approve PDF](#)

[TAB VIEW](#)

Features of Project Systems being reported:

Tested Feature	Form Name	Tested System	CF3R Status	CF3R Status	Next Step	Document	Document Status	Documentation Author	Responsible RATER
Existing Conditions	CF3R-EXC-20	31 Natoma St (System 1)	N/A	Complete	PDF Needs Approval	LINK TO Data Array Download	<input type="checkbox"/>	Johnny Rater (CAICERTS, Inc.)	Johnny Rater (CAICERTS, Inc.)
IAQ and MV	CF3R-MCH-27	31 Natoma St (System 1)	REQUIRED	Not Started	Complete all CF3Rs first	Download	<input type="checkbox"/>		

*** ALERT *** - PDF document that to be reviewed and approved. Please be sure to download the PDF, and review it. If the information is complete and accurate check the box of the PDF you approve and click the "Approve PDF" button below.

If the information is NOT correct, click on the RESUBMIT Link to correct the information. By checking each box, you certify that the content in the PDF is accurate and complete.

[Approve PDF](#)

- Click the check box located under Document Status.
- Click **Approve PDF** [Approve PDF](#).
- **Note:** Next, the Certificate of Compliance must be signed and paid for.




- Click directly on the **CF1R** link located at the top of your Project Home page.
- Click the dropdown to the right of TBD (To Be Determined) to select the **Documentation Author and Company**.
- Click the dropdown to the right of TBD (To Be Determined) to select **the Responsible Designer and Company Name**.
- Input the Designer's License.
- **Note:** CEA/HERS Certification Identification is not a required field.
- **Note:** Designer's License is a required field. If they do not have a license number, input NA.

Performance CF1R

Plan ID: 2019853

CEC Registration #: 217-P0165628588-000-000-00000000-0000

DRAFT CF1R Document:  [CLICK HERE TO PAY](#)

[Energy Calculation File](#) [Tests](#) [System Names](#) [Sign Off](#)

DOCUMENTATION AUTHOR - Alert: Needs Signature

Documentation Author:

Documentation Author Company Name:

CEA/HERS Certification Identification:

RESPONSIBLE DESIGNER - Alert: Needs Signature

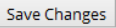

Responsible Designer Name:

Responsible Designer Company Name:

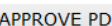
Designer's License: Required before PDF can be signed.

PROJECT REQUIRES CF3R-EXC-20 COMPLETION
Before the CF1R can become official, the CF3R-EXC-20 must be completed by a HERS Rater.
[CLICK HERE](#) to record the CF-3R-EXC-20.


[Save Changes](#)

- Click the **Save Changes** link .
- Click **OK** to confirm the Plan has been updated.
- **Note:** The Documentation Author and Responsible Designer can be two different users. The Documentation Author must sign off first then the Responsible Designer can sign off after the Documentation Author. If the user is listed as both the Documentation Author and Responsible Designer they can sign off for both signature blocks at the same time.
- Click the **PDF** icon  to review the Unofficial Certificate and close once complete
- Click the check box to **APPROVE the PDF**.

☐ I, Johnny Rater, APPROVE the above PDF file. 


- Click the **APPROVE PDF** link .
- Click **OK** to confirm the PDF has been signed.
- **Note:** Once the form has been approved it will display a date and time stamp.



Performance CF1R

Plan ID:	2019853
CEC Registration #:	217-P016562858B-000-000-0000000-0000
Official CF1R Document:	

[Energy Calculation File](#) | [Tests](#) | [System Names](#) | [Sign Off](#)

DOCUMENTATION AUTHOR - Signed	
Signed By:	Johnny Installer
Company:	DEV INSTALLERS &
CEA/HERS Certification Identification:	
Signed On:	2017-12-11 14:54:18
RESPONSIBLE DESIGNER - Signed REMOVE SIGNATURE	
Signed By:	Johnny Installer
Company:	DEV INSTALLERS &
Designer's License:	na
Signed On:	2017-12-11 14:54:18



- Click the **Pay** icon .
- **Note:** The database will automatically check the box of the current file you are in. If there are several items you can individually Click the check boxes to choose the specific items or Click the check box under Multi-Select to choose all of the items.
- Click **NEXT** .
- Follow the prompts in the shopping card to proceed with payment.
- **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.
- Click the [\[CLICK HERE\]](#) link to return to the page you came from.
- **Note:** The Next Step is to complete the required certificates of installation.



- Click directly on the CF2R link located at the top of your Project Home page.

- Click the **Report Results** link [Report Results](#) for the CF2R-MCH-01-H or the CF2R-ENV forms, if needed.

Please select the CF2Rs to complete below.

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF2R Status
1129964	Natoma Residence EAA	128431	System 1	31 Natoma Street		T26 Working View CF2R	T26 Complete View PDF

Linked Project(s)

Project ID	Project Name	System Name
1130125	Natoma Residence EAA	System 2
1130126	Natoma Residence EAA	System 3

[Cancel View\(s\)](#)

System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
		Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01-E	Not Started	Report Results				
		Fenestration Installation	CF2R-ENV-01	Not Started	Report Results				
		Insulation Installation	CF2R-ENV-03	Not Started	Report Results				
		SD HWS Distribution	CF2R-PLB-02	Not Started	Report Results				




- Input CF2R Results; Click **NEXT** [NEXT](#) or **BACK** [BACK](#) to navigate through the pages.
- On the final page Click the drop down to select the **Responsible Builder/Installer Name** and **Company Name** and input the Position With Company.

RESPONSIBLE PERSON

Responsible Builder/Installer Name

Company Name

Position With Company:



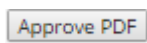

- Click **SUBMIT** [SUBMIT](#)
- Note:** Next you can input any remaining CF2Rs by Clicking **Report Results** [Report Results](#)
- Click the **Pay** icon .
- Follow the prompts in the shopping card to proceed with payment.
- Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.
- Click the [\[CLICK HERE\]](#) to return to the page you came from.
- Click the **PDF** icons  to review the Unofficial Certificate and close once complete.
- Click the check box located under Document Status.
- Click **Approve PDF** [Approve PDF](#).
- Click the **PDF** icons  to access the Official Certificate and close once complete.
- Note:** Next step is to input the CF3Rs.




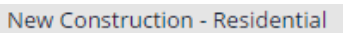



- Click directly on the **CF3R** link [CF3R](#) located at the top of your Project Home page.
- Click the **Report Results** link [Report Results](#) located to the right of the CF3R you would like to submit.
- On the final page click the drop down to select the **Responsible Rater Name** and **HERS Company Name** and input the Position With Company.






















- Click **SUBMIT** .

RESPONSIBLE PERSON	
Responsible Rater Name	Rater, Johnny (USR999999) ▼
HERS Rater Company Name	CalCERTS, Inc. ▼

- **Note:** Next you can input any remaining CF3Rs by Clicking [Report Results](#).
- Click the **Pay** icon .
- Follow the prompts in the shopping card to proceed with payment.
- **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.
- Click the [\[CLICK HERE\]](#) to return to the page you came from.
- Click the **PDF** icons  to review the Unofficial Certificate and close once complete.
- Click the check box located under Document Status.
- Click **Approve PDF** .
- Click the **PDF** icons  to access the Official Certificate and close once complete.

Residential New Construction

- Click the Projects link  located on the left side menu bar.
- Click the **New Construction - Residential** link .
- Click the **New Project** icon .
- Click the **New Project** icon  located below the Year Standards and to the right of **Single-Family Residence Multi Orientation or Single Address** for Project Type.
- Note:** To continue with a Single-Family Multi-Orientation Click .

Project Type	Year Standards				
	2005	2008	2013	2016	2019
- Single Family Residence (SFR) - Multi-Orientation (Subdivision, Planned Neighborhood, etc) <i>Performance Calculation File ONLY</i> ?					
- Single Family Residence (SFR) - SINGLE ADDRESS (Custom Home - Single Orientation, Single Lot, etc) <i>Performance Calculation File or Prescriptive CF1R-NCB-01</i> ?					
- Single Family Residence (SFR) - SINGLE ADDRESS ADDITION ONLY <i>Performance Calculation File or Prescriptive CF1R-ADD-01</i> ?	N/A	N/A			
- Multi-Family Residence (MFR) <i>Performance Calculation File ONLY</i> ?					
- Multi-Family Residence (MFR) - SINGLE BUILDING PRESCRIPTIVE ONLY <i>Prescriptive CF1R-NCB-01 OR CF1R-ADD-01</i> ?	N/A	N/A			

- Input the following information along with selecting the Default Utility:
 - Project Name
 - Project Type
 - Zip Code

New 2019 New Construction SINGLE FAMILY RESIDENCE SINGLE ADDRESS Project

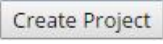
Project Name:

Project Type:

Zip Code: Required before ANY CF1R can be issued.

Default Gas Utility:

Default Electric Utility:

- Click the **Create Project** link .
- Click **OK** to confirm your project has been created.
- Input the Project Home information.
- You cannot move onto the CF2Rs until the Project Home page has been completely filled out and your CF1R has been approved and paid for.*
- If you do not see your Builder in the list you can add them by:*
 - Click My Industry Partners.

- Click My Builders/Architects.
- Click to select your Builder from the Master List and add them to your authorized list.
- Return to your project.

2019 New Construction SINGLE FAMILY Project	
Energy Standards Code Year:	2019
Company Controlling Project:	John Rater's HVAC
Project Name:	<input type="text" value="Test"/>
Project Type:	Single Family Residence
Builder:	--- SELECT FROM LIST --- <small>Required before ANY CF2R Certificate can be issued.</small>
Builder Contact Name:	<input type="text"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Builder Contact Phone:	<input type="text"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Zip Code:	95608 <small>Required before ANY CF1R can be issued.</small>
Project Address:	<input type="text"/> <small>Required before ANY CF1R can be issued.</small>
Project City:	--- SELECT FROM LIST --- <small>Required before ANY CF1R can be issued.</small>
Enforcement Agency / Building Department:	--- SELECT FROM LIST --- <small>Required before ANY CF1R can be issued.</small>
Permit Number:	<input type="text"/> <small>Required before any CF2R can be done.</small>
Default Gas Utility:	None
Default Electric Utility:	None
Project Superintendent:	<input type="text"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Contact Phone Number:	<input type="text"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Status:	Active
Save Changes	

- Click the **Save Changes** link [Save Changes](#).
- Click **OK** to confirm your data has been saved.



- Click directly on the **CF1R** link located at the top of your Project Home page.
- **Note:** Here you will have *two options*:

- **Upload a NEW CF1R.**



- Click the **New Plan** icon.
- Input a Plan Name.
- Select Utility.

New Plan (CF1R)

Plan Name:

Gas Utility:

SMUD

Electric Utility:

PG & E

OTHER PROVIDER REGISTRATION:

Check this box if this plan is being transferred from another HERS Provider:


☐ This Plan File is from another HERS Provider.

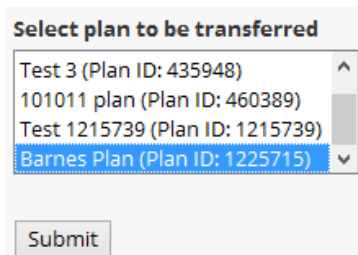
Registration Number:

Must be in proper format. For example: 114-N0000105A

Create Plan

- **Note:** **OTHER PROVIDER REGISTRATION** only applies if the plan is being transferred from another HERS Provider.
- Click the **Create Plan** link [Create Plan](#).

- Click the Performance CF1R: Click Here link.
PERFORMANCE CF1R: [\[CLICK HERE\]](#) in order to upload a new Energy Calculation file.
- Click the Choose File link [Choose File](#) OR Click Browse.
- Not: The option of Choose File or Browse will depend on what browser you're using.
- Locate your .xml you would like to work with.
- **Note:** We suggest storing the file in a location you can easily access such as your desktop or specific folder.
- Select a Plan Type, Multi-Plan or Standard Plan.
- **Note:** You can convert a Standard Plan to a Multi-Plan at any time but you can NEVER convert a Multi-Plan to a Standard Plan.
- Click the Upload File link [Upload File](#).
- **Note:** Each Plan generates its own unique Plan ID number and Registration Number.
- Click OK to confirm the file has been processed.
- Click on [\[CLICK HERE\]](#) and select the SIGN OFF tab to review the PDF document and sign.
- **Note:** After your CF1R has been uploaded the next step is to approve and pay for the CF1R. This is done within the CF1R on the SIGN OFF tab.
- **Transfer an existing plan from your bin to the project.**
 - Click the Transfer Plan From Bin icon .
 - Locate and Click on the Plan to highlight the Plan you would like to work with.
 - **Note:** Hold the ctrl key and Click to select multiple plans at once.




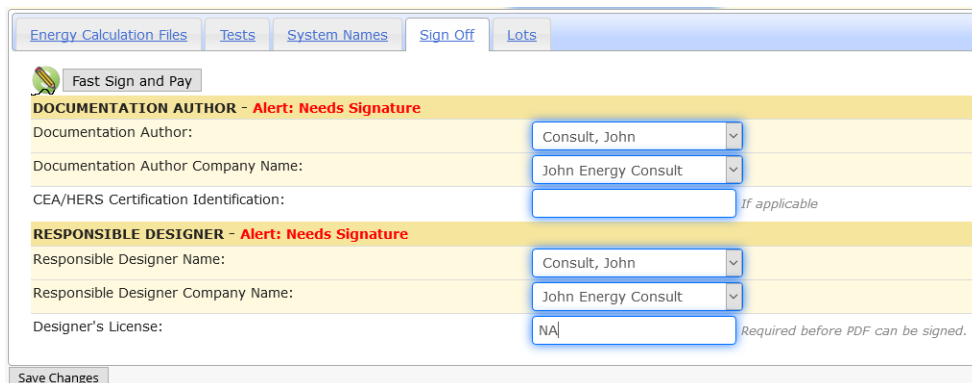
- Click the **SUBMIT** link [Submit](#).
- Click **OK** to transfer selected plans.

Press OK to transfer selected plans

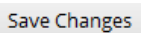


A small dialog box with a light gray background. It contains two buttons: 'OK' and 'Cancel', both with black text and a thin gray border.

- **Note:** You can ONLY access Plans within your BIN that are controlled by your company.
- Click the **Folder** Icon  in order to open the Plan you would like to access.
- **Note:** After your CF1R has been uploaded the next step is to approve and pay for the CF1R. This is done within the CF1R on the SIGN OFF tab.
- Click the dropdown to the right of TBD to select the Documentation Author and Company Name.
- Click the dropdown to the right of TBD to select the Responsible Designer and Company Name.
- Input the Designer's License.
- **Note:** CEA/HERS Certification Identification is not a required field.
- **Note:** Designer's License is a required field. If they do not have a license number input NA.



The image shows a software interface for the 'Sign Off' tab. At the top, there are five tabs: 'Energy Calculation Files', 'Tests', 'System Names', 'Sign Off' (which is active), and 'Lots'. Below the tabs is a 'Fast Sign and Pay' button. The main area is divided into two sections. The first section is titled 'DOCUMENTATION AUTHOR - Alert: Needs Signature' and contains three fields: 'Documentation Author:' with a dropdown menu showing 'Consult, John', 'Documentation Author Company Name:' with a dropdown menu showing 'John Energy Consult', and 'CEA/HERS Certification Identification:' with an empty text box and the note 'If applicable'. The second section is titled 'RESPONSIBLE DESIGNER - Alert: Needs Signature' and contains three fields: 'Responsible Designer Name:' with a dropdown menu showing 'Consult, John', 'Responsible Designer Company Name:' with a dropdown menu showing 'John Energy Consult', and 'Designer's License:' with a text box containing 'NA' and the note 'Required before PDF can be signed.' At the bottom left, there is a 'Save Changes' button.

- Click the Save Changes link .
- Click OK to confirm the plan has been saved.
- **Note:** The Documentation Author and Responsible Designer can be two different users. The Documentation Author must sign off first then the Responsible Designer can sign off after the Documentation Author. If the user is listed as both the Documentation Author and Responsible Designer they can sign off for both signature blocks at the same time.
- Click the Sign Off tab.


- Click the check box to acknowledge the Zone and System Count.

NOTE: 1 Zone(s) have been defined and are serviced by **1 Space Conditioning System(s)** Please be sure this is correct before proceeding.
☐ I, Joe Consultant, verify the above statement.

- Click the check box to **APPROVE the PDF**.

☐ I, Joe Consultant, APPROVE the above PDF file. **APPROVE PDF**

- Click the **APPROVE PDF** link **APPROVE PDF**

- Click **OK** to confirm PDF has been signed.
- Click the **NEED TO PAY** icon .
- Note: It is \$7.00 per upload.**
- Follow the prompts in the shopping card to proceed with payment.
- Choose the appropriate payment type.
- Note: Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.**

- Click the [\[CLICK HERE\]](#) to return to the page you came from.



- Click the **Lots** link located at the top of your page.



- Click the **NEW LOT** icon .

- Input the lot information.

Phase:	Phase 1	
Lot Label:		<i>This is typically the lot number.</i>
Address:		
Zip:	95630	
City:	Folsom	
State:	CA	
Permit Number:		<i>Required before any CF2Rs can be done.</i>
Number of Kitchens:	1	<i>Required before any CF2Rs can be done.</i>
Plan:	Select a Plan	
Gas Utility:	PG & E	
Electric Utility:	SMUD	
Add Lot		

- Click the **ADD LOT** link [Add Lot](#).
- Click **OK** to confirm Lot has been added.
- Select and fill in all of the required fields.
- Note:** If this lot is the Model Home for the plan Click the greyed out **NO** link [No](#) to switch to the green **YES** link [Yes](#).
- Note:** Model homes are needed when Sampling.

LOT ID:	1629757
Date Created:	4/28/2019
Phase:	Phase 1
Homeowner Packet:	Homeowner Packet
Lot Label:	001 <i>This is typically the lot number.</i>
Address:	001
Zip:	95630
City:	Folsom
State:	CA
Permit Number:	001 <i>Required before any CF2Rs can be done.</i>
Number of Kitchens:	1 <i>Required before any CF2Rs can be done.</i>
Plan:	Go To Plan 1storyExample2CathedralWHF
Gas Utility:	PG & E
Electric Utility:	SMUD
Default Rater:	Select Default Rater Manage Default Raters
Is this the Model Home for the plan (Initial Test)?	Yes
SUPPLEMENTAL CF2Rs	
Indicate which additional CF-2Rs are needed.	
CF2R-PLB-03	Pool and Spa
Save Information	

- Click the **Save Information** link [Save Information](#).
- Click **OK** to confirm your data has been saved.

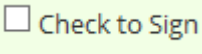
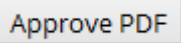


- Click the CF2R link located at the top of your page.




- Click **File Folder** icon to the right of the lot you want to open.

- Click the **Report Results** link [Report Results](#) to the right of the CF2R-MCH-01 for Space Conditioning Systems, Ducts and Fans.

- Input CF2R Results; click **Next** or **Back** to navigate through the pages.
- *Once the CF2R-MCH-01 is completed all required test measure will populate.*
- Click the check box to sign  next to all documents you want to approve.
- Scroll down and Click the **Approve PDF** link .
- **Submitting the Photovoltaic CF2R-PVB-01.**
 - Click [Report Results](#) located under Next Step, to the right of CF2R-PVB-01.
 - **Note:** Photovoltaic is required for all 2019 code New Construction projects. The information input into the CF2R-PVB-01 will determine if you need additional photovoltaic forms such as the CF2R-PVB-02.
- *Next you can Sample if applicable. This is an optional step and only applies to projects needing Sampling.*

- Click the **ProjectRoadmap** link  ProjectRoadmap ▼.

- Click the **Sample** link  located at the top of your page.
- *Sample Groups may be Closed or Open when created. Closed groups may include up to seven dwelling units. Open groups may be created with up to five dwelling units.*

○ **Create a Closed Sample Group.**

- To create a Closed Group, each of the seven dwelling units must have been installed and self-tested by the same contractor and must require the same HERS verifications and must be in the same subdivision or multifamily housing development.
- Click **CLOSED GROUP**.

Please select the sampling type to work with Barnes Residence



☐ **OPEN GROUP:** Sample Group cannot exceed 5. You may add lots to this group up to 180 days from the first CF-2R tested lot.

☒ **CLOSED GROUP:** Sample Group cannot exceed 7.

Would you like to test if you can sample to items together?

[\[CLICK HERE\]](#) for OPEN Groups

[\[CLICK HERE\]](#) for CLOSED Groups

- Click NEXT .
- **Note:** The Registry will list all dwelling units as lots available for sampling.
- Select the S icon  located to the right of any of the lots you would like to group together. The current lot you have open will automatically indicate YES in the Sample column.

ID	Lot Name	Phase	Plan	Permit	Address	City	Zip	Sample Group
783188	Lot 22	Phase 1	Plan 183	15-03386	489 Nelder Grove Court	Tulare	93274	
832291	Lot 31	Phase 1	Plan 1301	15-03385	489 Nelder Grove Court	Tulare	93274	
832292	Lot 32	Phase 1	Plan 1553	15-04072	472 Nelder Grove Court	Tulare	93274	
783189	Lot 33	Phase 1	Plan 204	15-04071	489 Nelder Grove Court	Tulare	93274	

- Click the default to in order to select the lots you would like to associate.

ID	Lot Label	Address	City	Zip	Group	Sample
783188	Lot 22	489 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>
832291	Lot 31	489 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>
832292	Lot 32	472 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>

- Click **NEXT** .
- Visually confirm these are the corrects lots and Click **CREATE GROUP**.

Tested Features:
 - Dust Leakage **544324** - CENTRAL AIR CONDITIONING (INC)
 - Refrigerant Charge **544324** - CENTRAL AIR CONDITIONING (INC)
 - Radon Equipment **544324** - CENTRAL AIR CONDITIONING (INC)
 - IAQ and MV **544324** - CENTRAL AIR CONDITIONING (INC)
 - Airflow **544324** - CENTRAL AIR CONDITIONING (INC)
 - Fan Efficiency **544324** - CENTRAL AIR CONDITIONING (INC)

The following addresses will be associated to the above group:

ID	Lot Label	Address	City	Zip
783188	Lot 22	489 Nelder Grove Court	Tulare	93274

- Click OK to confirm group has been created.
- Create an Open Sample Group.
 - To create the Open Group, each of the five dwelling units must have been installed and self-tested by the same contractor and must require the same HERS verifications and must be in the same subdivision or multifamily housing development. Lots may be added to the Open Group up to 180 days after the signature of the first CF2R registered lot.
 - Select OPEN GROUP and Click the **NEXT** link.

Please select the sampling type to work with Barnes Residence

☒ **OPEN GROUP:** Sample Group cannot exceed 5. You may add lots to this group up to 180 days from the first CF-2R tested lot.

☐ **CLOSED GROUP:** Sample Group cannot exceed 7.

Would you like to test if you can sample to items together?

[\[CLICK HERE\]](#) for OPEN Groups

[\[CLICK HERE\]](#) for CLOSED Groups

- Note:** The Registry will list all dwelling units as lots available for sampling.

- Select the **S** icon located to the right of any of the lots you would like to group together. The current lot you have open will automatically indicate YES in the Sample column.

ID	Lot Name	Phase	Plan	Permit	Address	City	Zip	Sample Group	Sample Size	Actions
83204	Lot 22	Phase 1	Plan 435 - Windsor	14-0485	2087 Emerald Bay	Tulane	93274	215-01485	4	Sample Link Resumed
710103	Lot 22	Phase 1	Plan 1204	15-04707	2037 Emerald Bay Avenue	Tulane	93274	215-02328	4	
78192	Lot 33	Phase 1	Plan 435 - Windsor	15-04845	2545 Emerald Bay Avenue	Tulane	93274			
78198	Lot 22	Phase 1	Plan 188	15-0558	455 Nelder Grove Court	Tulane	93274			
83209	Lot 22	Phase 1	Plan 1301	15-0558	455 Nelder Grove Court	Tulane	93274			
83202	Lot 22	Phase 1	Plan 1883	15-04872	472 Nelder Grove Court	Tulane	93274			

- Click the default to in order to select the lots you would like to associate.
- Click the **NEXT** link.

Tested Features:
 - Duct Leakage (544324 - CENTRAL AIR CONDITIONING INC)
 - Refrigerant Charge (544324 - CENTRAL AIR CONDITIONING INC)
 - Rated Equipment (544324 - CENTRAL AIR CONDITIONING INC)
 - IAQ and MV (544324 - CENTRAL AIR CONDITIONING INC)
 - Airflow (544324 - CENTRAL AIR CONDITIONING INC)
 - Fan Efficacy (544324 - CENTRAL AIR CONDITIONING INC)

Add To Sample Group (Associations):
 Select up to 4 Addresses you wish to add to this tested lot and click "NEXT"

ID	Lot Label	Address	City	Zip	Group	Sample
783188	Lot 22	469 Nelder Grove Court	Tulane	93274		<input type="button" value="No"/>
832291	Lot 31	469 Nelder Grove Court	Tulane	93274		<input type="button" value="No"/>
832292	Lot 32	472 Nelder Grove Court	Tulane	93274		<input type="button" value="No"/>

- Visually confirm these are the corrects lots and Click **CREATE GROUP**.

Tested Features:
 - Duct Leakage (544324 - CENTRAL AIR CONDITIONING INC)
 - Refrigerant Charge (544324 - CENTRAL AIR CONDITIONING INC)
 - Rated Equipment (544324 - CENTRAL AIR CONDITIONING INC)
 - IAQ and MV (544324 - CENTRAL AIR CONDITIONING INC)
 - Airflow (544324 - CENTRAL AIR CONDITIONING INC)
 - Fan Efficacy (544324 - CENTRAL AIR CONDITIONING INC)

The following addresses will be associated to the above group:

ID	Lot Label	Address	City	Zip
783188	Lot 22	469 Nelder Grove Court	Tulane	93274

- Click **OK** to confirm group has been created.




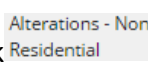

- Click the **CF3R** link located at the top of your page.
- Note:** The next step is to complete the CF3R forms used by the Rater for HERS Verification. These may include multiple CF3R-MCH, CF-3R-ENV, and CF3R-PLB forms.
- Note:** After all test information has been entered into any form, CF1R, CF2R, or CF3R, it must be signed before it can be completed. To review and sign multiple forms at once, use the Mass Signing Page for the selected form.
- The Mass Sign page for CF2Rs is available here:
https://www.calcerts.com/myinfo_docstosign.php?doctype=cf2r
- The Mass Sign page for CF3Rs is available here:
https://www.calcerts.com/myinfo_docstosign.php?doctype=cf3r



- Click the **Payment** link located at the top of your page.
- Note:** Once any form in the Registry is submitted and signed it can be processed for payment. Payment is required before the form can be printed. Payment may be made by any user who has access to the Project.

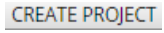

Non-Residential Alterations

Note: There are no CF1Rs or CF2Rs equivalents for Non-Residential projects on CalCERTS. The only forms certified through the registry are the NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, and NRCV-PLB-21. Either the **Installer** or the **HERS Rater** can create the project in the registry, but the **HERS Rater** must be the **Responsible Person** for the NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, and NRCV-PLB-21. If the **Installer** creates the project they must transfer the project to the **HERS Rater**.

- Click the **Projects** link  located on the left side menu bar.
- Click the **Alterations Non-Residential** link 
- Click the **New Project** icon 
- Input the required information such as the Project Name, Zip Code and the Installer CSLB.

Project Home (ID: 0)

Create New 2019 Non-Residential Alteration Project	
Project Name:	<input type="text" value="The Shop"/>
Project Zip Code:	<input type="text" value="95630"/> <small>Must be a valid integer</small>
What Type of Project?	<input type="text" value="NRCV-MCH-04 (Duct Leakage)"/>
Number of systems required:	<input type="text" value="1"/> <small>Use a positive number.</small>
Installer CSLB: <small>Enter 0 if installed by owner</small>	<input type="text" value="137345"/> <small>Must be a valid integer</small>
<input type="button" value="CREATE PROJECT"/>	

- Click the **CREATE PROJECT** link 
- Click **OK**  to confirm your project has been created.
- Input all of the Project Home information such as Project Address, Permit Number and Permit Date.

Project Information (Non-Res Alteration)	
Energy Standards Code Year:	2019
Company Controlling Project:	John Rater's HVAC
Project Name:	<input type="text" value="The Shop"/>
Zip Code:	<input type="text" value="95630"/>
Project Address:	<input type="text" value="31 Natoma Street"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project City:	<input type="text" value="Folsom"/>
Enforcement Agency / Building Department:	<input type="text" value="Folsom (City)"/>
Permit Number:	<input type="text" value="123456"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Permit Date:	<input type="text" value="04/23/2019"/> <small>Date must be no greater than today and is required before ANY NRCV Certificate can be issued.</small>
Utility - GAS:	<input type="text" value="SMUD"/>
Utility - ELECTRICITY:	<input type="text" value="PG & E"/>
Project Construction Manager:	<input type="text" value="Johnny Manager"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Contact Phone Number:	<input type="text" value="916-555-5555"/> <small>Required before ANY NRCV Certificate can be issued.</small>
NRCV-MCH Information	
NRCV-MCH Installer CSLB: <small>Enter 0 if installed by owner</small>	<input type="text" value="137345"/> <small>Must be a valid integer</small>
NRCV-MCH Installer Company Name:	DEV INSTALLERS &
Installer Contact Name:	<input type="text" value="Johnny Installer"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Installer Contact Phone:	<input type="text" value="916-444-4444"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project Status:	<input type="text" value="Active"/>
<input type="button" value="SAVE"/>	

- Click the **SAVE** link 

- Click the **Systems** link 

- Input the required information such as the HVAC System Identification, System Location, and System Type.

ID	HVAC System Identification or Name	System Location or Area Served	System Type	Action
1715499	System 001	1000	HVAC	

- Click the **Save Information** link 

- Click **Action**  to add addition Systems.

- Input how many Systems would you like to add

How many Systems would you like to add?



1

- Click **OK** 

- Note:** Here you have two options: **Sampling** or **100% Testing**.

- Sampling** → To choose Sampling

- Click the **Sampling** link 

- Click the **HVAC Systems** for the group by selecting  to 

Non-Res Abatement Sampling

Project Name:

The Shop (ID: 1402540)

Installing Contractor:

DEV INSTALLERS & (CSLB: 137345)

Tested Features:

NRCH/MCH/OA Dust Leakage

>>

Sample Group Worksheet

Create Sample Group (Associations)

Select the Systems you wish to group together and click "NEXT".


ID	System Name	System Location or Area Served	System Type	Group	Group Size	Select
1715499	System 001	1000	HVAC			<div>No</div>
1716652	System 002	1000	HVAC			<div>No</div>
1716653	System 003	1000	HVAC			<div>No</div>


NEXT


- Click the **NEXT** link 

- Note:** The current project you have open will automatically indicate YES in the Sample column.


Non-Res Abatement Sampling					
Project Name:		The Shop (ID: 1432540)			
Installing Contractor:		DEV INSTALLERS & (CLB: 137345)			
Tested Features:		NRCH MCH-OA Dust Leakage			
The following systems will be grouped (associated):					
ID	System Name	System Location or Area Served	System Type	Group	
1715499	System 001	1000	HVAC		
1716652	System 002	1000	HVAC		
1716653	System 003	1000	HVAC		
				Select Sample Group Number:	Create New Sample Group
BACK		SAVE GROUP			

- Confirm your selected group and Click the **SAVE GROUP** link 





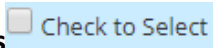
- Click **OK**  to confirm your group has been created.





- Click the **NRCV** link  for Non-Residential Certificates of Verification.
- Click the drop down to select the tested system.

Project ID	Project Name	Lot ID	Address	Sample Group	Project Info Complete
95121	The Shop	107040	31 National Street (System 1)		Yes
Features of Project Systems being reported:					
Tested Features	Form Name	Tested System	Status	Next Step	Unlink
Duct Leakage	NRCV-MCH-04	31 National Street (System 1)	Not Started	Report Results	N/A
Document	Document Status	Documentation Author	Responsible Person		

- Click **Report Results** 
- Input results and Click the drop down to select the **Responsible Rater Name** and **Company Name**.

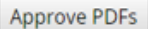

RESPONSIBLE PERSON	
Responsible Rater Name	Rater, Johnny (USR999999) ▼
HERS Rater Company Name	CalCERTS, Inc. ▼

- Click the **SUBMIT** link 
- Click **OK**  to confirm your NRCV form has been certified.
- Click the **Pay** icon 
- Follow the prompts in the shopping cart to proceed with payment.
- Choose the appropriate payment type.
- **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to Pay On Account.
- Click the [\[CLICK HERE\]](#) link to return to the page you came from.
- **Note:** Click the **PDF** icon  to review any documents before approving them.
- **Note:** Users must sign the NRCV form for each project.
- Click the **check boxes**  to the right of the NRCV-MCH-04 located under Document Status.


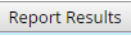
ID	System Name	Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
1715499	System 001	Duct Leakage	NRCV-MCH-04	(System 001)	Complete 	Done	 Download  Refresh PDF	 Check to Select	Johnny Rater (John Rater's HVAC)	Johnny Rater (John Rater's HVAC)

*** ALERT *** There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the 'Check to Select' box, you are certifying that the content in the PDF is complete and accurate. Click 'Approve PDFs' to approve all documents that you have selected with 'Check to Select' box.





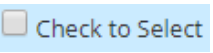
Select All PDF Documents to Sign
Approve PDFs





- Click **Approve PDFs** link 
- **Note:** Click the **PDF** icon  to access the official registered NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, or NRCV-PLB-21.

- **100% Testing** → To Choose 100% Testing

- Click the **NRCV**  for Non-Residential Certificates of Verification.
- Click the **Report Results** link 
- Input results and Click the drop down to select the **Responsible Rater Name** and **Company Name**.

RESPONSIBLE PERSON	
Responsible Rater Name	Rater, Johnny (USR999999) ▼
HERS Rater Company Name	CalCERTS, Inc. ▼

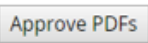

- Click the **SUBMIT** link 
- Click **OK**  to confirm your NRCV-MCH-04 has been certified.
- Click the **Pay** icon 
- Follow the prompts in the shopping cart to proceed with payment.
- Choose the appropriate payment type.
- **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.
- Click the [\[CLICK HERE\]](#) link to return to the page you came from.
- **Note:** Click the **PDF** icon  to review any documents before approving them.
- **Note:** Users must sign the NRCV form for each project.
- Click the **check boxes**  to the right of the NRCV form located under Document Status.

Project ID	Project Name	Lot ID	Address	Sample Group	Project Info Complete			
767665	The Shop	854035	31 Natoma (System 1)		Yes			
Features of Project Systems being reported:								
Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
Duct Leakage	NRCV-MCH-04	31 Natoma (System 1)	Completed 	Done	[LINK TO DATA SHEET] 8/2/2015 10:06 AM 	<input type="checkbox"/>	Johnny Rater (CalCERTS, Inc.)	Johnny Rater (CalCERTS, Inc.)
						Download 		
						Approve 		

***** ALERT ***** - PDF document that to be reviewed and approved. Please be sure to download the PDF, and review it. If the information is complete and accurate check the box of the PDF you approve and click the "Approve PDF" button below. If the information is NOT correct, click on the RESUBMIT Link to correct the information.


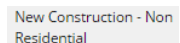

By checking each box, you certify that the content in the PDF is accurate and complete.

[Approve PDF](#)

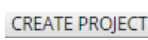

- Click **Approve PDFs** link 
- **Note:** Click the **PDF** icon  to access the official registered NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, or NRCV-PLB-21.

Non-Residential New Construction

There are no CF1Rs or CF2Rs equivalents for Non-Residential projects on CalCERTS. The only forms certified through the registry are the NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, and NRCV-PLB-21. Either the **Installer** or the **HERS Rater** can create the project in the registry, but the **HERS Rater** must be the **Responsible Person** for the NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, and NRCV-PLB-21. If the **Installer** creates the project they must transfer the project to the **HERS Rater**.

- Click the **Projects** link  located on the left side menu bar.
- Click the **New Construction – Non-Residential** 
- Click the **New Project** icon 
- Input the required information such as the Project Name, Zip Code and the Installer CSLB.

Create New 2019 Non-Residential New Construction Project	
Project Name:	<input type="text" value="The Garden"/>
Project Zip Code:	<input type="text" value="95630"/> <small>Must be a valid integer</small>
What Type of Project?	<input type="text" value="NRCV-MCH-04 (Duct Leakage)"/>
Number of systems required:	<input type="text" value="1"/> <small>Use a positive number.</small>
Installer CSLB: <small>Enter 0 if installed by owner</small>	<input type="text" value="137345"/> <small>Must be a valid integer</small>
<input type="button" value="CREATE PROJECT"/>	

- Click the **CREATE PROJECT** link 
- Click **OK**  to confirm your project has been created.
- Input all of the Project Home information such as Project Address, Permit Number and Permit Date.

Project Information (Non-Res New Construction)	
Energy Standards Code Year:	2019
Company Controlling Project:	John Rater's HVAC
Project Name:	<input type="text" value="The Garden"/>
Zip Code:	<input type="text" value="95630"/>
Project Address:	<input type="text" value="31 Natoma Street"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project City:	<input type="text" value="Folsom"/>
Enforcement Agency / Building Department:	<input type="text" value="Folsom (City)"/>
Permit Number:	<input type="text" value="123456"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Permit Date:	<input type="text" value="04/23/2019"/> <small>Date must be no greater than today and is required before ANY NRCV Certificate can be issued.</small>
Utility - GAS:	<input type="text" value="SMUD"/>
Utility - ELECTRICITY:	<input type="text" value="PG & E"/>
Project Construction Manager:	<input type="text" value="Johnny Manager"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Contact Phone Number:	<input type="text" value="916-555-5555"/> <small>Required before ANY NRCV Certificate can be issued.</small>
NRCV-MCH Information	
NRCV-MCH Installer CSLB: <small>Enter 0 if installed by owner</small>	<input type="text" value="137345"/> <small>Must be a valid integer</small>
NRCV-MCH Installer Company Name:	DEV INSTALLERS &
Installer Contact Name:	<input type="text" value="Johnny Installer"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Installer Contact Phone:	<input type="text" value="916-444-4444"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project Status:	<input type="text" value="Active"/>
<input type="button" value="SAVE"/>	

- Click the **SAVE** link 



- Click the **Systems** link
- Input the required information such as the HVAC System Identification, System Location, and System Type.

ID	HVAC System Identification or Name	System Location or Area Served	System Type	Action
1715499	System 001	1000	HVAC	

- Click the **Save Information** link

Save Information



- Click **Action** **Action** to add additional Systems.
- Input how many Systems would you like to add

How many Systems would you like to add?

- Click **OK**

OK

- Note:** Here you have two options: **Sampling** or **100% Testing**.

- Sampling** → To choose **Sampling**



- Click the **Sampling** link

- Click the HVAC Systems for the group by selecting ☐ **No** to ☒ **Yes**

Non-Recirculation Sampling

Project Name: The Shop (ID: 1432540)

Installing Contractor: DEV INSTALLERS & (CLB) 137345

Tested Features: NRCV-MCH-04 Duct Leakage

[Sample Group Worksheet](#)

Create Sample Group (Associations):
Select the Systems you wish to group together and click "NEXT".

ID	System Name	System Location or Area Served	System Type	Group	Sample Box	Select
1715499	System 001	1000	HVAC			<input type="checkbox"/>
1716552	System 002	1000	HVAC			<input type="checkbox"/>
1716553	System 003	1000	HVAC			<input type="checkbox"/>

NEXT

- Click the **NEXT** link

NEXT

- Note:** The current project you have open will automatically indicate **YES** in the **Sample** column.

Non-Recirculation Sampling

Project Name: The Shop (ID: 1432540)

Installing Contractor: DEV INSTALLERS & (CLB) 137345

Tested Features: NRCV-MCH-04 Duct Leakage

The following systems will be grouped (associated):

ID	System Name	System Location or Area Served	System Type	Group
1715499	System 001	1000	HVAC	
1716552	System 002	1000	HVAC	
1716553	System 003	1000	HVAC	



BACK

Select Sample Group Number: Create New Sample Group

SAVE GROUP

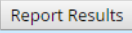
- Confirm your selected group and click the **SAVE GROUP** link

SAVE GROUP






- Click **OK**  to confirm your group has been created.
- Click the **NRCV** link  for Non-Residential Certificates of Verification.
- Click the drop down to select the Tested System.

Features of Project Systems being reported:

ID	System Name	Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
1716565	System 001	Duct Leakage	NRCV-MCH-04	System 001	Not Started	Report Results				

- Click the **Report Results** link .
- Input results and Click the drop down to select the **Responsible Rater Name** and **Company Name**.

RESPONSIBLE PERSON	
Responsible Rater Name	Rater, Johnny (USR999999)
HERS Rater Company Name	CalCERTS, Inc.

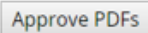

- Click the **SUBMIT** link .
- Click **OK**  to confirm your NRCV form has been certified.
- Click the **Pay** icon .
- Follow the prompts in the shopping cart to proceed with payment.
- Choose the appropriate payment type.
- **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.
- Click the [\[CLICK HERE\]](#) link to return to the page you came from.
- **Note:** Click the **PDF** icon  to review any documents before approving them.
- **Note:** Users must sign the NRCV form for each project.
- Click the check boxes  **Check to Select** to the right of the form name located under Document Status.

ID	System Name	Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
1716565	System 001	Duct Leakage	NRCV-MCH-04	(System 001)	Complete	Done	Download PDF	Check to Select	Johnny Rater (john.rater@HVAC)	Johnny Rater (john.rater@HVAC)



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[Select All PDF Documents to Sign](#)





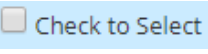
[Approve PDFs](#)




- Click **Approve PDFs** link .
- **Note:** Click the **PDF** icon  to access the official registered NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, or NRCV-PLB-21.

- **100% Testing** → To choose 100% Testing

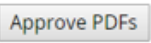

- Click the **NRCV** link  for Non-Residential Certificates of Verification.
- Click the **Report Results** link 
- Input results and Click the drop down to select the **Responsible Rater Name** and **Company Name**.

RESPONSIBLE PERSON	
Responsible Rater Name	Rater, Johnny (USR999999) ▼
HERS Rater Company Name	CalCERTS, Inc. ▼


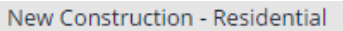


- Click the **SUBMIT** link 
- Click **OK**  to confirm your NRCV form has been certified.
- Click the **Pay** icon 
- Follow the prompts in the shopping cart to proceed with payment.
- Choose the appropriate payment type.
- **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.
- Click the [\[CLICK HERE\]](#) link to return to the page you came from.
- **Note:** Click the **PDF** icon  to review any documents before approving them.
- **Note:** Users must sign the NRCV form for each project.
- Click the **check boxes**  to the right of the form name located under Document Status.






















ID	System Name	Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
1715585	System 001	Duct Leakage	NRCV-MCH-04	(System 001)	Complete 	Done	 Download  Refresh PDF	<input type="checkbox"/> Check to Select	johnny Rater (john Rater's HVAC)	johnny Rater (john Rater's HVAC)

***** ALERT ***** There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the 'Check to Select' box, you are certifying that the content in the PDF is complete and accurate. Click 'Approve PDFs' to approve all documents that you have selected with 'Check to Select' box.

- Click **Approve PDFs** link 
- **Note:** Click the **PDF** icon  to access the official registered NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, or NRCV-PLB-21.

Multi-Family Project

- Click the **Projects** link  located on the left side menu bar.
- Click the **New Construction - Residential** link 
- Click the **New Project** icon 
- Click the **New Project** icon  located below the Year Standards and to the right of **Multi-Family Residence (MFR)** for Project Type.

Project Type	Year Standards				
	2005	2008	2013	2016	2019
- Single Family Residence (SFR) - Multi-Orientation (Subdivision, Planned Neighborhood, etc) <i>Performance Calculation File ONLY</i> ?					
- Single Family Residence (SFR) - SINGLE ADDRESS (Custom Home - Single Orientation, Single Lot, etc) <i>Performance Calculation File or Prescriptive CF1R-NCB-01</i> ?					
- Single Family Residence (SFR) - SINGLE ADDRESS ADDITION ONLY <i>Performance Calculation File or Prescriptive CF1R-ADD-01</i> ?	N/A	N/A			
- Multi-Family Residence (MFR) <i>Performance Calculation File ONLY</i> ?					
- Multi-Family Residence (MFR) - SINGLE BUILDING PRESCRIPTIVE ONLY <i>Prescriptive CF1R-NCB-01 OR CF1R-ADD-01</i> ?	N/A	N/A			

- Input the following information along with selecting the Default Utility:
 - Project Name
 - Project Type
 - Zip Code

New 2019 New Construction MULTI-FAMILY Multi-Orientation Project

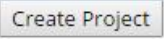

Project Name:

Project Type:

Zip Code: Required before ANY CF1R can be issued.

Default Gas Utility:

Default Electric Utility:

- Click the **CREATE PROJECT** link 
- Click **OK**  to confirm your project has been created.
- Input the Project Home information.
- Note:** You cannot move onto the CF2Rs until the Project Home page has been completely filled out and your CF1R has been approved and paid for.

2019 New Construction MULTI-FAMILY Project	
Energy Standards Code Year:	2019
Company Controlling Project:	John Rater's HVAC
Project Name:	Test
Region:	N/A
Project Type:	Multi Family Residence (Multi-Orientation)
Builder:	--- SELECT FROM LIST --- <small>Required before ANY Installation Certificate can be issued.</small>
Builder Contact Name:	<input type="text"/> <small>Required before ANY Installation Certificate can be issued.</small>
Builder Contact Phone:	<input type="text"/> <small>Required before ANY Installation Certificate can be issued.</small>
Zip Code:	95608
Project Address 1:	<input type="text"/>
Project Address 2:	<input type="text"/>
Project City:	--- SELECT FROM LIST ---
Enforcement Agency / Building Department:	--- SELECT FROM LIST ---
Default Gas Utility:	None
Default Electric Utility:	None
Project Superintendent:	<input type="text"/> <small>Required before ANY Installation Certificate can be issued.</small>
Contact Phone Number:	<input type="text"/> <small>Required before ANY Installation Certificate can be issued.</small>
Status ?	Active
Block MCH-25 Weigh-In Option for Entire Project? ?	No
Save Changes	

- Click the **Save Changes** link [Save Changes](#)
- **Note:** If you do not see your Builder in the list you can add them by:
 - Click **My Industry Partners**
 - Click **My Builders/Architects**
 - Click to select your Builder from the Master List and add them to your authorized list
 - Return to your project

- Click **OK** [OK](#) to confirm your data has been saved.




- Click the **CF1R** link
- **Note:** Here you will have two options:
 - **Upload a NEW CF1R**

- Click the **New Plan** icon
- Input a Plan Name
- Select Utility

New Plan (CF1R) for Test (1385364)	
Plan Name: (Please do not use double or single quotes in the name)	Plan 1
Gas Utility:	None
Electric Utility:	None
OTHER PROVIDER REGISTRATION:	<input type="checkbox"/> Check this box if this plan is being transferred from another HERS Provider. Registration Number: <input type="text"/> <small>Must be in proper format. For example: 116-P0100001054</small>
Create Plan	

- **Note: OTHER PROVIDER REGISTRATION** only applies if the plan is being transferred from another HERS Provider.
- Click the **Create Plan** link [Create Plan](#)

- Click **OK**  to confirm the plan has been created.
- Click the **Performance CF1R: Click Here** link
PERFORMANCE CF1R: [\[CLICK HERE\]](#) in order to upload a new Energy Calculation file.

Please provide a file to upload:
[Choose File](#) To file chosen

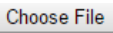

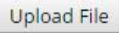


Since this is the first file to be uploaded to this plan, it will be recorded as the Compliance File.

What TYPE of plan do you want this to be?


MULTI-FILE PLAN: Use this option if you wish to upload a Single Compliance File now and may have a need on updating the plan with a new Energy Calculation File for the purpose of Energy Star, CxRP or NDRP later. This option gives you the flexibility to update your above code program Energy Calculation File later.

SINGLE-FILE PLAN: (Previously called Standard) If your calculation file **MEETS AT LEAST 10%** above standards AND you may be applying for Energy Star, CxRP and/or NDRP, you should use the SINGLE-FILE Plan Type to upload and manage a single calculation file. Once uploaded, you may modify it as often as you need to until any CDRs or CDRs are registered.


Note: You can convert a SINGLE-FILE PLAN to a MULTI-FILE PLAN at any time, but you can never convert a MULTI-FILE PLAN back to a SINGLE-FILE PLAN.
[Upload File](#)


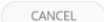
- Click the **Choose File** link  OR Click the **Browse** link 
- **Note:** The option of **Choose File** or **Browse** will depend on what browser you're using.
- Locate your .xml you would like to work with.
- **Note:** We suggest storing the file in a location you can easily access such as your desktop or specific folder.
- Select **MULTI-FILE PLAN**.
- **Note:** You can convert a Single-File Plan to a Multi-File Plan at any time but you can NEVER convert a Multi-File Plan to a Single-File Plan.
- Click all the check boxes for additional certificates applicable to the project.
- Click **Upload File** link 
- **Note:** Each Plan generates its own unique Plan ID number and Registration Number.
- Click **OK**  to confirm the file has been processed.
- Click the **Pay**  icon to pay for the certificate

Pay Option:

 **QUICKPAY**
*** ALERT *** The registration of this document will require payment before printing.

There will be a \$7.00 charge for this registration.

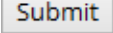


If you wish to QUICKPAY for this certificate, check this box:
I, **Johnny Rater**, authorize CalCERTS to apply the total of \$7.00 against my John Rater's HVAC Account. 

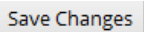

 

- **Note:** After your CF1R has been uploaded the next step is to approve and pay for the CF1R. This is done within the CF1R on the SIGN OFF tab.
- **Transfer an existing plan from your bin to the project**


- Click the **Transfer Plan From Bin** icon 

- Click the dropdown to select the plan you would like to transfer into this project from your CF1R Bin:

- Click the **Submit** link 
 - Click **OK**  to transfer selected plans.
 - **Note:** You can *ONLY* access Plans within your BIN that are controlled by your company.
 - Click the **Folder** Icon  in order to open the Plan you would like to work with.
 - **Note:** After your CF1R has been uploaded the next step is to approve and pay for the CF1R. This is done within the CF1R on the SIGN OFF tab.
- Click the dropdown to the right of TBD to select the Documentation Author and Company Name.
 - Click the dropdown to the right of TBD to select the Responsible Designer and Company Name.
 - Input the Designer's License.
 - **Note:** CEA/HERS Certification Identification is not a required field.
 - **Note:** Designer's License is a required field. If they do not have a license number input NA.

- Click the **Save Changes** link 
- Click **OK**  to confirm the plan has been saved.


- **Note:** The Documentation Author and Responsible Designer can be two different users. The Documentation Author must sign off first then the Responsible Designer can sign off after the Documentation Author. If the user is listed as both the Documentation Author and Responsible Designer they can sign off for both signature blocks at the same time.


- Click the **Sign Off** tab .
- Click the check box to acknowledge the Dwelling Units.

NOTE: 8 Dwelling Unit(s) have been defined. Please be sure this is correct before proceeding.


☐ I, Johnny Rater, verify the above statement.

As the Documentation Author AND Responsible Designer, please review the above PDF file. If the file is accurate and you wish to create an FINAL AND OFFICIAL CFIR, please check the box below and click the APPROVE PDF Button.

☐ I, Johnny Rater, APPROVE the above PDF file. 




- Click the check box to APPROVE the PDF.

☐ I, Johnny Rater, APPROVE the above PDF file. 

- Click the **SIGN PDF** link 

Energy Calculation Files **Sign Off** Buildings/Dwelling Units

 Fast Sign

DOCUMENTATION AUTHOR - Alert: Needs Signature

Documentation Author:

Documentation Author Company Name:

CEA/HERS Certification Identification: If applicable

RESPONSIBLE DESIGNER - Alert: Needs Signature

Responsible Designer Name:

Responsible Designer Company Name:

Designer's License: Required before PDF can be signed.


PDF DOCUMENT SIGN OFF


DRAFT CFIR PDF



NOTE: 8 Dwelling Unit(s) have been defined. Please be sure this is correct before proceeding.


☐ I, Johnny Rater, verify the above statement.

As the Documentation Author AND Responsible Designer, please review the above PDF file. If the file is accurate and you wish to create an FINAL AND OFFICIAL CFIR, please check the box below and click the APPROVE PDF Button.

☐ I, Johnny Rater, APPROVE the above PDF file. 



- Click **OK**  to confirm PDF has been signed.
- Click the **NEED TO PAY** icon 
- It is \$7.00 per upload and \$3.00 per additional above code files.
- Follow the prompts in the shopping card to proceed with payment.
- Choose the appropriate payment type.
- Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.

 **PAY AS YOU GO SHOPPING CART**

THANK YOU!!! [\[CLICK HERE\]](#) to return to the page you came from.

The transaction is completed.


An e-mail has been sent to **notification@calcerts.com**. You may also print this page as a receipt.

A Payment of \$7.00 was charged against your Credit Account by Joe Consultant.


Credit Account Information

Invoice Number: 906552
Order Date: 5/5/2016 11:01 PST
Starting Balance: \$4,979.00
Amount on Invoice: \$7.00
New Balance: \$4,972.00




Description	Unit Price	QTY	\$
CF-1R: Standard Plan Plan 1 - 216-N0166934A	\$7.00	1	\$7.00
TOTAL			\$7.00

- Click the **Click Here** link [\[CLICK HERE\]](#) to return to the page you came from.
- Click the **Buildings/Dwelling Units** tab [Buildings/Dwelling Units](#) within the CF1R page.
- Click the  icon to create the dwelling units.

[Energy Calculation Files](#) [Sign Off](#) [Buildings/Dwelling Units](#)

No dwelling units have been created for this calculation file. This file has **8 dwelling unit(s)** in the calculation.
If you wish to create a building with 8 dwelling unit(s) so you can record CF2R and CF3R information, click the PLUS icon. 

[Save Changes](#)

- Click **OK**  to confirm units have been created.
- *If you wish to create additional dwelling unit(s) so you can record CF2R and CF3R information Click the link once more.*
If you wish to create another 8 dwelling unit(s) so you can record CF2R and CF3R information, click the PLUS icon. 
- Click the **UNITS** link [UNITS](#)
Model Dwelling Unit has NOT been defined.To modify Dwelling Unit Information, go to the [UNITS](#) page.
- Click the **File Folder** icon  to the right of the Dwelling Unit you would like to model for the plan.
- Input the information on the Dwelling Unit and indicate yes on this being the model for the plan.

UNITS Edit Dwelling Unit for **Testing** (1452573)

Dwelling Unit Name:	1stFlrOneBR-(1/2)
Address:	31 Natoma Street
Zip:	00000
City:	CalCERTSville
State:	CA
Permit Number:	<input type="text"/> <small>Required before any CF2Rs can be done.</small>
Number of Kitchens:	1 <small>Required before any CF2Rs can be done.</small>
Plan:	Plan 1
Default Rater:	Select Default Rater
Block MCH-25 Weigh-In Option?	Use Project Default (NOT BLOC)
Is this the Model Unit for the plan (Initial Test)?	<input type="button" value="No"/>
<input type="button" value="Save Information"/>	

- Click the **Save Information** link

- Click **OK**

- You can now access the Unit page by:

- Click the **UNITS** link

- Click the **CF2R** link

- Click the **File Folder** icon to the right of the lot you want to open

- Click the **Report Results** link [Report Results](#) to the right of the CF2R-MCH-01 for Space Conditioning Systems, Ducts and Fans

- Input CF2R Results; click **Next** or **Back** to navigate through the page

- Once the CF2R-MCH-01 is completed all required test measure will populate.

- Click the **Check Box to Sign** ☐ Check to Sign next to all documents you want to approve

- Click **Approve PDFs** link

- Next you can Sample if applicable. This is an optional step and only applies to projects needing Sampling.

- Click the **Sample** link

- Sample Groups may be **Closed** or **Open** when created. Closed groups may include up to seven dwelling units. Open groups may be created with up to five dwelling units.

- **Create a Closed Sample Group**



- To create a Closed Group, each of the seven dwelling units must have been installed and self-tested by the same contractor and must require the same HERS verifications and must be in the same subdivision or multifamily housing development.
- Click **CLOSED GROUP**

Please select the sampling type to work with Barnes Residence



☐ **OPEN GROUP:** Sample Group cannot exceed 5. You may add lots to this group up to 180 days from the first CF-2R tested lot.

☒ **CLOSED GROUP:** Sample Group cannot exceed 7.


Would you like to test if you can sample to items together?
[CLICK HERE](#) for OPEN Groups
[CLICK HERE](#) for CLOSED Groups

- Click the **NEXT** link 
- *The Registry will list all dwelling units as lots available for sampling.*
- Select the **S** icon  located to the right of the lot you would like to add to the group. The current project you have open will automatically indicate **Yes** in the Sample column.

ID	Lot Name	Phase	Plan	Permit	Address	City	Zip	Sample Group	Actions
783188	Lot 22	Phase 1	Plan 105	15-00385	469 Nelder Grove Court	Tulare	93274		
832291	Lot 31	Phase 1	Plan 1001	15-00385	460 Nelder Grove Court	Tulare	93274		
832292	Lot 32	Phase 1	Plan 1053	15-04072	472 Nelder Grove Court	Tulare	93274		
783189	Lot 33	Phase 1	Plan 204	15-04071	460 Nelder Grove Court	Tulare	93274		

- Click the default  to  in order to select the lots you would like to associate.

ID	Lot Label	Address	City	Zip	Group	Sample
783188	Lot 22	469 Nelder Grove Court	Tulare	93274		
832291	Lot 31	460 Nelder Grove Court	Tulare	93274		
832292	Lot 32	472 Nelder Grove Court	Tulare	93274		

- Click the **NEXT** link 
- Visually confirm these are the corrects lots and Click **CREATE GROUP**

Tested Features:
 - Duct Leakage (544324 - CENTRAL AIR CONDITIONING (AC))
 - Refrigerant Charge (544324 - CENTRAL AIR CONDITIONING (AC))
 - Rated Equipment (544324 - CENTRAL AIR CONDITIONING (AC))
 - IAQ and MV (544324 - CENTRAL AIR CONDITIONING (AC))
 - Airflow (544324 - CENTRAL AIR CONDITIONING (AC))
 - Fan Efficiency (544324 - CENTRAL AIR CONDITIONING (AC))

The following addresses will be associated to the above group:

ID	Lot Label	Address	City	Zip
783188	Lot 22	469 Nelder Grove Court	Tulare	93274

- Click **OK**  to confirm group has been created.

○ Create an Open Sample Group

- To create the Open Group, each of the five dwelling units must have been installed and self-tested by the same contractor and must require the same HERS verifications and must be in the same subdivision or multifamily housing development. The group cannot be open for more than 180-days after the first dwelling unit is tested.
- Select **OPEN GROUP** and Click the **NEXT** link.

Please select the sampling type to work with Barnes Residence

☒ **OPEN GROUP:** Sample Group cannot exceed 5. You may add lots to this group up to 180 days from the first CF-2R tested lot.

☐ **CLOSED GROUP:** Sample Group cannot exceed 7.

NEXT

Would you like to test if you can sample to items together?
[\[CLICK HERE\]](#) for OPEN Groups
[\[CLICK HERE\]](#) for CLOSED Groups

- *The Registry will list all dwelling units as lots available for sampling.*
- Select the **S** icon located to the right of the lot you would like to add to the group. The open project will automatically indicate **Yes** in the Sample column.

ID	Lot Name	Phase	Plan	Permit	Address	City	Zip	Sample Group	Sample Size	Actions
852045	Lot 22	Phase 1	Plan 428 - Windsor	14-03903	2807 Emerald Bay	Tulare	93274	215-01450	5	Sample Limit Reached
712103	Lot 22	Phase 1	Plan 1301	15-04707	2807 Emerald Bay Avenue	Tulare	93274	215-02208	4	
783182	Lot 33	Phase 1	Plan 428 - Windsor	15-04945	2545 Emerald Bay Avenue	Tulare	93274			
783188	Lot 22	Phase 1	Plan 185	15-03365	469 Nelder Grove Court	Tulare	93274			
832291	Lot 31	Phase 1	Plan 1321	15-03365	469 Nelder Grove Court	Tulare	93274			
832292	Lot 32	Phase 1	Plan 1855	15-04972	472 Nelder Grove Court	Tulare	93274			

- Click the default **No** to **Yes** in order to select the lots you would like to associate.
- Click the **NEXT** link

Tested Features:
 - Duct Leakage (544324 - CENTRAL AIR CONDITIONING INC)
 - Refrigerant Charge (544324 - CENTRAL AIR CONDITIONING INC)
 - Rated Equipment (544324 - CENTRAL AIR CONDITIONING INC)
 - IQ and MV (544324 - CENTRAL AIR CONDITIONING INC)
 - Airflow (544324 - CENTRAL AIR CONDITIONING INC)
 - Fan Efficiency (544324 - CENTRAL AIR CONDITIONING INC)

Add To Sample Group (Associations)
 Select up to 4 addresses you wish to add to this tested lot and click "NEXT".

ID	Lot Label	Address	City	Zip	Group	Sample
783188	Lot 22	469 Nelder Grove Court	Tulare	93274		No
832291	Lot 31	469 Nelder Grove Court	Tulare	93274		No
832292	Lot 32	472 Nelder Grove Court	Tulare	93274		No

NEXT

- Visually confirm these are the corrects lots and Click **CREATE GROUP**

Tested Features:
 - Duct Leakage (544324 - CENTRAL AIR CONDITIONING INC)
 - Refrigerant Charge (544324 - CENTRAL AIR CONDITIONING INC)
 - Rated Equipment (544324 - CENTRAL AIR CONDITIONING INC)
 - IQ and MV (544324 - CENTRAL AIR CONDITIONING INC)
 - Airflow (544324 - CENTRAL AIR CONDITIONING INC)
 - Fan Efficiency (544324 - CENTRAL AIR CONDITIONING INC)

The following addresses will be associated to the above group:

ID	Lot Label	Address	City	Zip
783188	Lot 22	469 Nelder Grove Court	Tulare	93274

BACK **CREATE GROUP**

- Click **OK** to confirm group has been created.






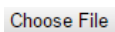

- Click the **CF3R** link
 - *The next step is to complete the CF3R forms used by the Rater for HERS Verification. These may include multiple CF3R-MCH, CF-3R-ENV, and CF3R-PLB forms.*
 - **Note:** *After all test information has been entered into any form, CF1R, CF2R, or CF3R, it must be signed before it can be completed. To review and sign multiple forms at once, use the Mass Signing Page for the selected form.*
 - The Mass Sign page for CF2Rs is available here
https://www.calcerts.com/myinfo_docstosign.php?doctype=cf2r
 - The Mass Sign page for CF3Rs is available here
https://www.calcerts.com/myinfo_docstosign.php?doctype=cf3r

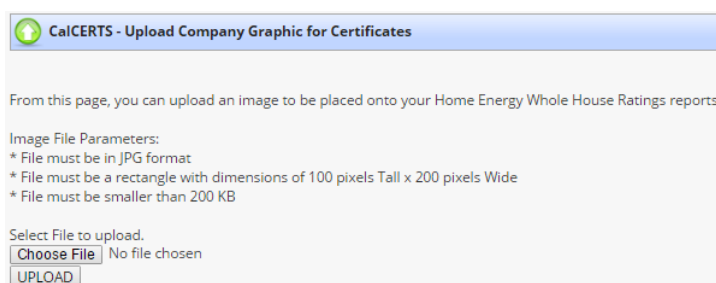





- Click the **Payment** link
- *Once any form in the Registry is submitted and signed it can be processed for payment. Payment is required before the form can be printed. Payment may be made by any user who has access to the Project.*

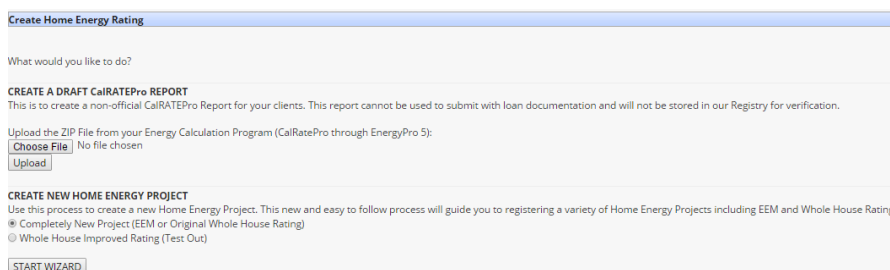
Home Energy Ratings

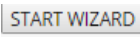
This walk through applies to both New Construction and Existing Homes.

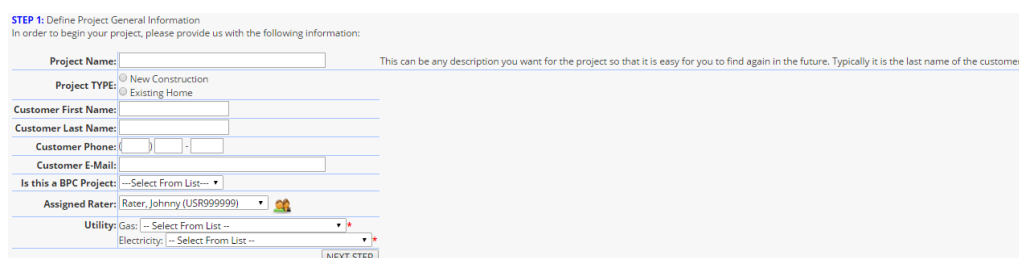
- Click the **Projects** link  Projects located on the left side menu bar.
- Click the **Home Energy Ratings** link 
- **Here you have an additional option before you create your project.**
 - Upload Company Graphic to be placed onto your Home Energy Whole House Rating Reports:
 - Click the **Upload Company Graphic for Certificates** link 
 - Click the **Choose File** link  OR Click the **Browse** link 
 - *The option of **Choose File** or **Browse** will depend on what browser you're using.*



- Click **UPLOAD** 
 - Click the **Back** link 
- Click the **Home Energy Rating Project** icon 
 - Click the option for **Completely New Project (EEM or Original Whole House Rating)**



- Click **START WIZARD** 
- Input the required project information



- Click **NEXT STEP** [NEXT STEP](#)
- Click the **Choose File** link [Choose File](#) OR Click the **Browse** link [Browse...](#)
- *The option of **Choose File** or **Browse** will depend on what browser you're using.*

STEP 2: Upload Calculation File
Upload Existing/Proposed Calculation File from EnergyPro (aka: Whole House Rating Results for upload to CalCERTS ZIP file).

Calculation File: [Choose File](#) No file chosen

This file can be JUST the Existing Rating of the house
OR
The Existing Rating of the house WITH Proposed Improvements

[NEXT STEP](#)

- Click **NEXT STEP** [NEXT STEP](#)
- *If the address is already registered in our database an Alert will prompt. **Here you have two options:***
 - Select the existing address and Click **Go to Matched Project** [Go To Matched Project](#)
 - **OR**
 - Click the [\[CLICK HERE\]](#) link to proceed as a Brand New Project.

***** ALERT *****

This address may already be in our registry. If this is a TEST OUT rating for one of the addresses below, please select the address below and upload the file to that project.

Project Name	Address	City	Zip	Test-In Company	Test-In Rater	Test-Out Company	Test-Out Rater	UPLOAD TO THIS PROJECT
Arch Residence	1234 Main St.	Sacramento	95814	John Rater's HVAC	Johnny Rater			<input type="radio"/>
Squirrel Hut	1234 Main St.	Sacramento	95814	CalCERTS, Inc.	Johnny Rater			<input type="radio"/>

[Go To Matched Project](#)

I DO NOT WANT TO USE THE PROJECT ABOVE!
[\[CLICK HERE\]](#) to proceed as a BRAND NEW Project.

- *This example is for a Brand New Project.*
- Click **Whole House Rating Report**.

STEP 3: Pay for Draft Reports
Johnny Rater can do EEM and/or Whole House Rating Reports.

Please select what you intend to use this report for.
If you plan on using it for both EEM and Whole House Rating, don't worry. Select one method now and you can add the other report later.

☐ EEM Report
☒ Whole House Rating Report

[Pay for Draft](#)

If you would like to select a different Rater for this job, select them here and click "Change Rater".

Rater, Johnny (USR999999) [Change Rater](#)

- *You have the option to change the HERS Rater by clicking the drop down and then Click **Change Rater** [Change Rater](#)*
- Click **Pay for Draft** [Pay for Draft](#)
- Choose the appropriate payment type.
- *Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.*

Johnny Rater logged in [\[Logout\]](#)
[\[Home\]](#) [\[Back\]](#) [\[Log Out\]](#)



Please verify the information below.

Qty	Item	Unit Price	Total
1	Home Energy Whole House Rating Draft	\$28.00	\$28.00
1	QA Surcharge	\$0.00	\$0.00
Total			\$28.00

Method To Pay:	<input checked="" type="radio"/> Credit Card <input type="radio"/> On Account (\$1,112.50 Balance)
----------------	---

[Check Out](#)

- Click **Check Out** [Check Out](#)
- Follow the prompts in the shopping cart to proceed with payment.

THANK YOU!!!


The transaction is completed.
You should receive a confirmation via e-mail as well. You may want to print this page for your records.

Billing Info

Invoice Number: OL-HE-00921487
Order Date: 5/16/2016 11:36
Amount Paid: \$28.00

QTY	Item	Unit Price	Total
1	Home Energy Whole House Rating Draft	\$28.00	\$28.00
1	QA Surcharge	\$0.00	\$0.00

To return to where you were before the Shopping Cart: [\[CLICK HERE\]](#)

- Click the [\[CLICK HERE\]](#) link to return to the page you came from.
- You have the option to **Edit Project Info** [EDIT PROJECT INFO](#) or **Replace File** [REPLACE FILE](#)
- You can Click the **PDF** icon(s)  to access the DRAFT ONLY versions for review.

STEP 4: Review, Pay for Final and Certify

Your DRAFT Report(s) are ready to review.

Project Name:	Arch Residence
Project Address:	1234 Main St. Sacramento, 95814
Customer Name:	Arty Arch
Customer Phone:	916-985-3400
Customer E-Mail:	artyarch@builderwest.com
Assigned Rater:	Johnny Rater (USR999999)
Utility:	Gas: No Utility Electricity: No Utility
Status:	Active
Invoice Info:	Whole House Rating Draft: Invoice #921487

[EDIT PROJECT INFO](#)

HOME ENERGY FILE UPLOAD FILE INFORMATION	
Climate Zone: 12	Orientation: 0
Conditioned Floor Area: 2519	Volume: 22671
Number of Stories: 1	REPLACE FILE

REPORTS

Pay for EEM: Would you like to purchase an EEM Report? [Pay for Draft](#)

Whole House Rating:

California Home Energy Audit Certificate: (DRAFT ONLY)	PDF Created
California Home Energy Rating Certificate: (DRAFT ONLY)	PDF Created
Narrative Explanation and Recommendations (DRAFT ONLY):	PDF Created
Data Input Summary (DRAFT ONLY):	PDF Created
Energy Consumption Analysis Report (DRAFT ONLY):	PDF Created
Energy Upgrade Recommendations (DRAFT ONLY):	PDF Created
CalRATEPro Cost Summary (DRAFT ONLY):	PDF Created
Print ALL Whole House Rating Reports (DRAFT ONLY):	PDF Created

[PAY FOR FINAL/OFFICIAL Report](#)

☐ I, Johnny Rater (USR999999), CERTIFY that the information uploaded to this registry is true and correct.

[CERTIFY Report](#)

- Click the **Check Box** to agree and CERTIFY that the information uploaded to this registry is true and correct.
- Click **CERTIFY Report** [CERTIFY Report](#)
- Click **PAY FOR FINAL/OFFICIAL Report** [PAY FOR FINAL/OFFICIAL Report](#)
- Choose the appropriate payment type.
- Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.*

Johnny Rater logged in [\[Logout\]](#)
[\[Home\]](#) [\[Back\]](#) [\[Log Out\]](#)

Please verify the information below.

Qty	Item	Unit Price	Total
1	Home Energy Whole House Rating Final	\$10.00	\$10.00
Total			<u>\$10.00</u>

Method To Pay:	<input checked="" type="radio"/> Credit Card <input type="radio"/> On Account (\$1,084.50 Balance)
-----------------------	---

[Check Out](#)

- Click **Check Out** [Check Out](#)
- Follow the prompts in the shopping cart to proceed with payment.

THANK YOU!!!

The transaction is completed.
You should receive a confirmation via e-mail as well. You may want to print this page for your records.

Billing Info

Invoice Number: OL-HE-00921610
Order Date: 5/16/2016 12:29
Amount Paid: \$10.00

QTY	Item	Unit Price	Total
1	Home Energy Whole House Rating Final	\$10.00	\$10.00

To return to where you were before the Shopping Cart: [CLICK HERE](#)







- Click the [CLICK HERE](#) link to return to the page you came from.

STEP 5: CERTIFIED AND COMPLETE

Your OFFICIAL Report(s) are ready to review.

Project Name:	Arch Residence
Project Address:	1234 Main St. Sacramento, 95814
Customer Name:	Arty Arch
Customer Phone:	916-985-3400
Customer E-Mail:	artyarch@builderwest.com
Assigned Rater:	Johnny Rater (USR999999)
Utility:	Gas: No Utility Electricity: No Utility
Status:	Active
Invoice Info:	Whole House Rating Draft: Invoice #921487 Whole House Rating Final: Invoice #921610

HOME ENERGY FILE UPLOAD FILE INFORMATION			
Climate Zone:	12	Orientation:	0
Conditioned Floor Area:	2519	Volume:	22671
Number of Stories:	1		


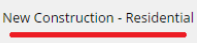



REPORTS	
Pay for EEM:	Would you like to purchase an EEM Report? Pay for Draft
Whole House Rating:	<div>California Home Energy Audit Certificate: </div> <div>California Home Energy Rating Certificate: </div> <div>Narrative Explanation and Recommendations: </div> <div>Data Input Summary: </div> <div>Energy Consumption Analysis Report: </div> <div>Energy Upgrade Recommendations: </div> <div>CalRATEPro Cost Summary: </div> <div>Print ALL Whole House Rating Reports: </div>

REGISTER TEST-OUT: Whole House Rating Improved: [REGISTER Whole House Rating Improved](#)



- You can Click the **PDF** icons  to access the FINAL versions.

Energy Start 3+

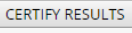
Energy Star 3/3.1/3.2 only applies to New Construction Residential Projects





- Log into www.calcerts.com
- Click **Projects**  located on the left side menu bar.
- Click **New Construction - Residential** .
- Click either the **Name** or the **Work with Project** icon  in order to open the project you would like to submit your Energy Star documents to.
- Click **Actions**  located in the upper right hand corner of the page.
- Click **Energy Star 3+**  Energy Star 3+
- Click step 1. Verify Dwelling Unit qualifies for Energy Star 3/3.1/3.2.
- Click the **Provide Bedroom Count** [\[Provide Bedroom Count\]](#) link for each lot.
- Input the bedroom count, check the box and Click **Save**.

004 Bedroom Count Verification:
Number of Bedrooms:
☐ By checking this box, I (Johnny Rater) verify that this building meets the ENERGY STAR HERS Index Target and qualifies for participation in the Energy Star program.


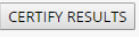




- Click the **Report Results** icon .
- Click **NEXT**  located to the right of the form needing to be filled out.
- Fill out the form by clicking the appropriate radio dial next to each item.
- Some items will also have text boxes used for data entry.

4.3 Condenser manufacturer & model:	<input type="text"/>
4.4 Evaporator / fan coil manufacturer & model:	<input type="text"/>
4.5 AHRI reference #: ²¹	<input type="text"/>

- Select the appropriate names from the drop-down menus near the bottom of the forms.
- Select whether or not it passed or failed. **FINAL TESTED RESULT:** ☒ Pass ☐ Fail
- Click **CERTIFY RESULTS**  to submit the form.

- Click the **Pay** icon 
- **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to Pay On Account or use QuickPay before you have submitted the form.
- Click on the **PDF** icon  in order to download each form.
- **Note:** The **Refresh PDF** icons  can be clicked to refresh the PDF document if something does not look correct. The **Resubmit** icon  can be used to resubmit the document if needed.





Inspected Lot	Status	Start	001 123 Test Way
123 Test Way (001)	Complete 		
123 Test Way (001)	Complete 		
123 Test Way (001)	Complete 		
123 Test Way (001)	Complete 		


- Click **NEXT**  under Energy Star FINAL Certificate for Revision 3+.
- As with the previous forms, fill out the information and click **CERTIFY RESULTS**  to submit.
- Click  to confirm the submission
- Click the  icon to pay for the certificate
- Select  and follow the steps for the payment option designated
- **Note:** Once the payment is completed, click the [CLICK HERE](#) hyperlink to return to the page you came from
- Click on the **PDF** Icon  for Energy Star Certificate in order to download.


Completing Projects

Signature Notifications

■ CF1Rs

- Within the CF1R Registration Bin
- Click **CF-1R Registration** 
- Select the year code for the bin you would like to access. This feature only applies to the 2013, 2016, or 2019 code.
- Open the CF1R you would like to access by clicking .
- Select the Documentation Author, Responsible Designer & Designer's License.
- Click **Save Changes** .
- If you are listed as the Documentation Author, you will need to sign before you move onto the next step.
- Click  to email the Responsible Person.

DOCUMENTATION AUTHOR - Alert: Needs Signature	
Documentation Author:	Consultant, Joe
Documentation Author Company Name:	Joe Consultant
CEA/HERS Certification Identification:	<input type="text"/> If applicable
RESPONSIBLE DESIGNER - Alert: Needs Signature  Check this box if you want to be included in e-mail to Responsible Person.	
Responsible Designer Name:	Consultant, Joe
Responsible Designer Company Name:	Joe Consultant
Designer's License:	na Required before PDF can be signed.

- 
- Click **OK** to confirm you would like to send the notification.
- Once the email has been sent the confirmation of who requested the notification will be displayed.

DOCUMENTATION AUTHOR - Alert: Needs Signature	
Documentation Author:	Consultant, Joe
Documentation Author Company Name:	Joe Consultant
CEA/HERS Certification Identification:	<input type="text"/> If applicable
RESPONSIBLE DESIGNER - Alert: Needs Signature  Johnny Rater has already made a request for a signature.	
Responsible Designer Name:	Builder, Johnny
Responsible Designer Company Name:	Builder One
Designer's License:	NA Required before PDF can be signed.



- Within a Project

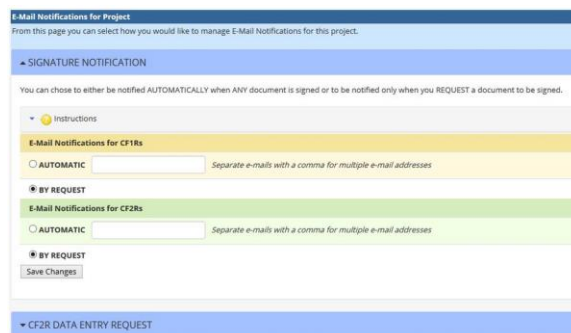
- o Open the New Construction Residential project you would like to work with.

- o Click **Actions**  located in the upper right.

- o Click **E-Mail Notifications**  

- o Input the email address you would like to use and select AUTOMATIC or BY REQUEST.

- **Automatic** - If you select AUTOMATIC, every time a document is signed (CF1R or CF2R), an e-mail will go to the address entered.
- **By Request** - If you select BY REQUEST, any user can click the E-Mail Icon requesting a signature. An e-mail will be sent to the Responsible Person requesting a signature. When that user signs the document (CF1R or CF2R) an automatic e-mail will be sent to the user who initiated the request.




- o Click the drop down for instructions for further details  (Optional.)

- o Click **Save Changes** 

- o Repeat the steps if you would like to receive notifications for both options.


- o Click **CF1R link** 

- o Open the CF1R you would like to work with by clicking .

- o Select the Documentation Author, Responsible Designer & Designer's License.

- o Click **Save Changes** 

- o **Note:** If you are listed as the Documentation Author, you will need to sign first before you move onto the next step.

- o Click  to email the Responsible Person.

Energy Calculation Files Tests System Names Sign Off Lots

DOCUMENTATION AUTHOR - Alert: Needs Signature

Documentation Author: Builder, Johnny

Documentation Author Company Name: Builder One

CEA/HERS Certification Identification: If applicable

RESPONSIBLE DESIGNER - Alert: Needs Signature Check this box if you want to be included in e-mail to Responsible Person.

Responsible Designer Name: Builder, Johnny

Responsible Designer Company Name: Builder One

Designer's License: na Required before PDF can be signed.

Save Changes

- o Click **OK** to confirm you would like to send the notification.
- o Once the email has been sent the confirmation of who requested the notification will be displayed.

Energy Calculation Files Tests System Names Sign Off Lots

DOCUMENTATION AUTHOR - Alert: Needs Signature

Documentation Author: Consultant, Joe

Documentation Author Company Name: Joe Consultant

CEA/HERS Certification Identification: If applicable

RESPONSIBLE DESIGNER - Alert: Needs Signature Johnny Rater has already made a request for a signature.




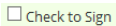


Responsible Designer Name: Builder, Johnny

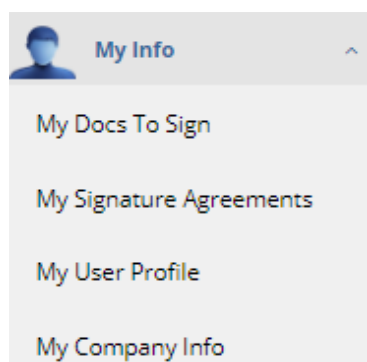
Responsible Designer Company Name: Builder One

Designer's License: NA Required before PDF can be signed.






Save Changes


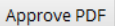
Signing Documents

- All forms must be signed by the **Documentation Author** and then the **Responsible Person** before they become final and ready for payment.
- Once all required information is entered into a form and reviewed the document is ready to be signed.
- Users may sign forms individually or may use the **My Docs to Sign** page to sign groups of documents.
 - o To sign a single form, select the form type from the **Project Roadmap** such as **CF1R**  or **CF2R**  or **CF3R**  then select the **Check to Sign**  .
 - o Next select the **PDF** icon  to review the unofficial document before approval.
 - o Next select **Approve PDF**  .
 - o To sign multiple forms at once use the **My Docs to Sign** page.
 - Select **My Info** from the left-hand side menu bar and select **My Docs to Sign**.






- The list of unsigned documents, categorized by type, will load.

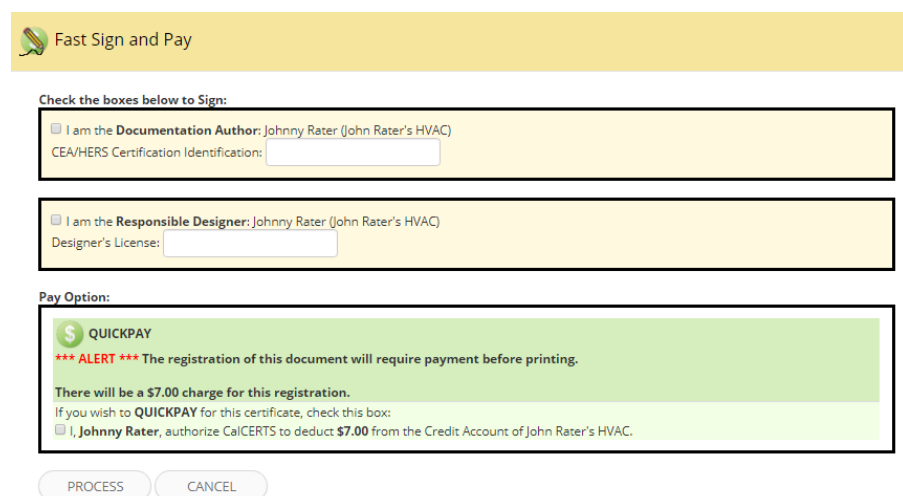
Document Type		
	CF1R Performance Documents	N/A
	CF1R Prescriptive Documents	Click To Sign Document(s)
	CF1R Supplemental Documents	N/A
	CF2R Documents	N/A
	CF3R Documents	N/A

- Next select **Click To Sign Document(s)** [Click To Sign Document\(s\)](#) .
- **Note:** The **Click To Sign Documents** will only appear if there are documents to sign for that document type.
- Next select the **PDF** icon  to review the unofficial document before approval.
- Next check all of the boxes for the forms you would like to approve.
- Next select **Approve PDF**  .

Payment

- Once a form in the registry is submitted and approved it may be processed for payment.
- Payment is required before the official form can be printed.
- To pay for a form within a specific section of the project select the **Pay** icon  and submit payment for the active form.
- To pay for a form and sign the document at the same time, you have the option to click the Fast Sign and Pay icon  

Note: All applicable check boxes and certification/license numbers will need to be completed prior to checking the box to authorize the charge, then click **Process**.




Fast Sign and Pay


Check the boxes below to Sign:

☐ I am the **Documentation Author**: Johnny Rater (John Rater's HVAC)
CEA/HERS Certification Identification:

☐ I am the **Responsible Designer**: Johnny Rater (John Rater's HVAC)
Designer's License:

Pay Option:

 **QUICKPAY**
***** ALERT ***** The registration of this document will require payment before printing.
There will be a \$7.00 charge for this registration.
If you wish to QUICKPAY for this certificate, check this box:
☐ I, **Johnny Rater**, authorize CalCERTS to deduct **\$7.00** from the Credit Account of John Rater's HVAC.

- To pay for forms from the Project Roadmap select the **Payment** link  and submit payment for selected forms.
- **Note:** Payment may be made by any user who has access to the project. Users with the additional permission of **View/Pay Invoice** and **Pay On Account** have the ability to place and use credits on the account.
- **Note:** Payments are typically processed as credit card payments; however, if there is a credit on the account, the user will see an option to **Pay On Account** to process the payment.
- **Requesting a Credit**
 - To request a credit from CalCERTS for deleted projects or certificates, please provide an invoice number to the CalCERTS Billing Department and information supporting the request for credit. The request should be sent to Billing@calcerts.com. Once the request is received, the Billing Department will verify the invoice and work with the user to initiate the credit.

Status Report

- **Project Status Report (PSR)**

- The Project Status Report (**PSR**) is a report available through the CalCERTS Registry that summarizes a project's history and allows for an expedited review of the project. Any user with access to the project can access the **PSR**. The **PSR** summarizes which HERS measures were required for the project and confirms that the measures were verified. The **PSR** was specifically designed to assist Building Officials with code compliance. To generate the **PSR**, the HERS Registry must verify all compliance information and summarize the status of the project to facilitate enforcement. The **PSR** lets Building Officials quickly determine whether final inspection of a project is warranted and allows Building Officials to access and review all of the required compliance forms, removing the need for voluminous paper submissions.
- Each **PSR** contains a QR code. Through the use of a QR Code, the **PSR** is easily accessible on mobile devices.

[illegible][illegible]

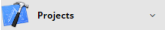
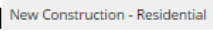
QR Code




Green = Complete

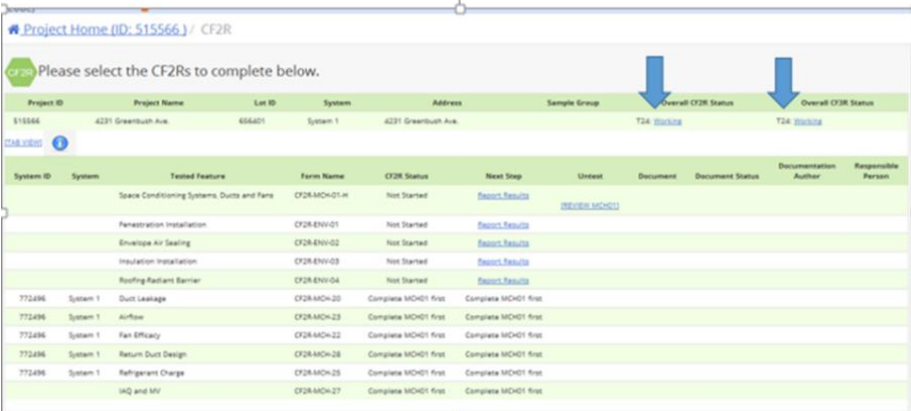
Red = Incomplete

- **PSR Access for Building Officials**
 - To access the PSR, Building Departments must be registered with CalCERTS. To create an account reference the User Registration section of the manual and select “I am a Building Department/Enforcement Agency Personnel for a City or County.”
 - Next, the Building Official should login into the Registry. Once in the Registry, the project lookup page will automatically load.

- The Building Official may search for projects in their jurisdiction using any of the following criteria:
 - The Permit Number
 - The CEC Registration Number
 - The CalCERTS Certificate Number
 - Street Address
 - The Name of the HERS Rater for the Project
 - The ID # of the HERS Rater for the Project

- Once a project is selected, the **PSR** page will be accessible.
- **PSR** access for Non-Building Officials:
 - Log into www.calcerts.com
 - Click **Projects**  located on the left side menu bar.
 - Click **New Construction - Residential** .


- Click the **Access Project** icon  located to the right of the selected project.
- Click the **CF2R** Link  OR Click the **CF3R** Link .
- Click the status link **Working** OR **Complete** (depending on the status) located under Overall CF2R Status OR Overall CF3R Status as shown below. Either link will take you to the **PSR**:



The screenshot shows the 'Project Home' interface for project ID 515566. It includes a summary table and a detailed table of CF2R items.

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF3R Status
515566	4231 Greenbush Ave.	656401	System 1	4231 Greenbush Ave.	T24	Working	Working

System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Linkset	Document	Document Status	Documentation Author	Responsible Person
		Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01-H	Not Started	Review Results					
		Penetration Installation	CF2R-ENV-01	Not Started	Review Results					
		Envelope Air Sealing	CF2R-ENV-02	Not Started	Review Results					
		Insulation Installation	CF2R-ENV-03	Not Started	Review Results					
		Roofing Radiant Barrier	CF2R-ENV-04	Not Started	Review Results					
772496	System 1	Duct Leakage	CF2R-MCH-20	Complete MCHD1 First	Complete MCHD1 First					
772496	System 1	Airflow	CF2R-MCH-23	Complete MCHD1 First	Complete MCHD1 First					
772496	System 1	Fan Efficacy	CF2R-MCH-22	Complete MCHD1 First	Complete MCHD1 First					
772496	System 1	Return Duct Design	CF2R-MCH-28	Complete MCHD1 First	Complete MCHD1 First					
772496	System 1	Refrigerant Charge	CF2R-MCH-25	Complete MCHD1 First	Complete MCHD1 First					
		IAQ and MV	CF2R-MCH-27	Complete MCHD1 First	Complete MCHD1 First					

- **Note:** Here you will see a quick view of the report.
- Click the **PDF** icon  to download the **PSR**.

■ Sampling Status Report (SSR)

- In addition to the Project Status Report, CalCERTS has the Sampling Status Report (**SSR**). The **SSR** is similar to the **PSR**, but is designed for projects verifying compliance through sampling. The **SSR** summarizes a project's history and allows for an expedited review of the project. Any user with access to the project can access the **SSR**. The **SSR** summarizes which HERS measures were required for the group, confirms which measures were verified, and confirms that a project is ready for final inspection. The **SSR** has been specifically designed by the California Energy Commission to assist Building Officials with code compliance.

and CF3R page for new construction projects. Builders can review the QSR to confirm all necessary compliance documents have been completed before scheduling a final inspection.


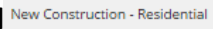




GENERAL INFORMATION		
Project Name Label Address		
Test Project 1 Lot 1 12345 Test Way		
CF2R INFORMATION - Certificate of Installation		
System	Form	Compliance
	CF2R-ENV-01 (Penetration Installation)	●
	CF2R-ENV-02 (Envelope Air Sealing)	●
	CF2R-ENV-03 (Insulation Installation)	●
	CF2R-MCH-01 (Space Conditioning Systems, Ducts and Fans)	●
System 1	CF2R-MCH-20 (Duct Leakage)	●
System 1	CF2R-MCH-23 (Airflow)	●
System 1	CF2R-MCH-22 (Fan Efficacy)	●
System 1	CF2R-MCH-25 (Refrigerant Charge)	●
	CF2R-MCH-27 (IAQ and MV)	●
	CF2R-LTG-01 (Lighting)	●
	CF2R-PLB-02 (SD HWS Distribution)	●
CF3R INFORMATION - Certificate of Verification		
System	Form	Compliance
System 1	CF3R-MCH-20 (Duct Leakage)	●
System 1	CF3R-MCH-23 (Airflow)	●
System 1	CF3R-MCH-22 (Fan Efficacy)	●
System 1	CF3R-MCH-25 (Refrigerant Charge)	●
	CF3R-MCH-27 (IAQ and MV)	●

GENERAL INFORMATION		
Project Name Label Address		
Test Project 1 Lot 4 1236 Test Way		
CF2R INFORMATION - Certificate of Installation		
System	Form	Compliance
	CF2R-ENV-01 (Penetration Installation)	●
	CF2R-ENV-02 (Envelope Air Sealing)	●
	CF2R-ENV-03 (Insulation Installation)	●
	CF2R-MCH-01 (Space Conditioning Systems, Ducts and Fans)	●
System 1	CF2R-MCH-20 (Duct Leakage)	●
System 1	CF2R-MCH-23 (Airflow)	●
System 1	CF2R-MCH-22 (Fan Efficacy)	●
System 1	CF2R-MCH-25 (Refrigerant Charge)	●
	CF2R-MCH-27 (IAQ and MV)	●
	CF2R-LTG-01 (Lighting)	●
	CF2R-PLB-02 (SD HWS Distribution)	●
CF3R INFORMATION - Certificate of Verification		
System	Form	Compliance
System 1	CF3R-MCH-20 (Duct Leakage)	●
System 1	CF3R-MCH-23 (Airflow)	●
System 1	CF3R-MCH-22 (Fan Efficacy)	●
System 1	CF3R-MCH-25 (Refrigerant Charge)	●
	CF3R-MCH-27 (IAQ and MV)	●

● Green = Complete

● Red = Incomplete

○ To access the **QSR**:

- Log into www.calcerts.com
- Click **Projects**  located on the left side menu bar.
- Click **New Construction - Residential** .
- Click the **Access Project** icon  located to the right of the selected project.
- Click the **CF2R** Link  or the **CF3R** Link .
- Click the **Quick Status** icon . Here you can quickly view the status as shown below:

GENERAL INFORMATION		
Project Name Label Address		
Test Project 1 Lot 1 12345 Test Way		
CF2R INFORMATION - Certificate of Installation		
System	Form	Compliance
	CF2R-ENV-01 (Penetration Installation)	●
	CF2R-ENV-02 (Envelope Air Sealing)	●
	CF2R-ENV-03 (Insulation Installation)	●
	CF2R-MCH-01 (Space Conditioning Systems, Ducts and Fans)	●
System 1	CF2R-MCH-20 (Duct Leakage)	●
System 1	CF2R-MCH-23 (Airflow)	●
System 1	CF2R-MCH-22 (Fan Efficacy)	●
System 1	CF2R-MCH-25 (Refrigerant Charge)	●
	CF2R-MCH-27 (IAQ and MV)	●
	CF2R-LTG-01 (Lighting)	●
	CF2R-PLB-02 (SD HWS Distribution)	●
CF3R INFORMATION - Certificate of Verification		
System	Form	Compliance
System 1	CF3R-MCH-20 (Duct Leakage)	●
System 1	CF3R-MCH-23 (Airflow)	●
System 1	CF3R-MCH-22 (Fan Efficacy)	●
System 1	CF3R-MCH-25 (Refrigerant Charge)	●
	CF3R-MCH-27 (IAQ and MV)	●

- **Note:** This report is only a quick view and there is no PDF to download.

CalCERTS Support Services

Registry Questions - Support@calcerts.com

The *CalCERTS Support Team* is available by phone and email to help with Registry related questions. Registry users may contact Support by emailing Support@calcerts.com, or by calling (916) 985-3400 ext. *.

CalCERTS also has a [Helpdesk](#) that addresses frequently asked questions (FAQs) from our Registry users. The Helpdesk is located at <https://calcerts.zendesk.com> and has up-to-date articles and FAQs addressing a variety of projects.

Compliance Questions – Support@calcerts.com

The *CalCERTS Compliance Team* is available by phone and email to help with questions related to California's Building Energy Efficiency Standards. Common questions received by our Compliance Team include questions related to Home Energy Rating System (HERS) requirements and compliance form registration. To reach the Compliance Team email Support@calcerts.com or call (916) 985-3400 ext *.

Training Questions – Training@calcerts.com

The *CalCERTS Training Team* is available by phone and email to help schedule training, answer training and certification questions, and to provide guidance and assistance to our students. To reach our Training Team email Training@calcerts.com or call (916) 985-3400 ext. 2013.

Quality Assurance Questions – QA@calcerts.com

The *CalCERTS Quality Assurance Team* is available by phone and email to answer questions related to quality assurance field reviews of CalCERTS Certified Raters. To reach our QA Team email QA@calcerts.com or call (916) 805-5238.

Billing Questions – Billing@calcerts.com

The *CalCERTS Finance Team* is available by phone and email to answer questions related to payments, billing, invoices, discounts, and credits. To reach our Finance Team email Billing@calcerts.com or call (916) 985-3400 ext. 2010.

General Questions – Info@calcerts.com

If none of the above options apply to your questions or comments, please contact us at info@calcerts.com.