



CalCERTS

Registry User Manual



Version: July 2017

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 and 2016 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.

CalCERTS was approved for the 2016 Code Cycle on October 19, 2016. Please see CEC Resolution No: 16-1019-5.

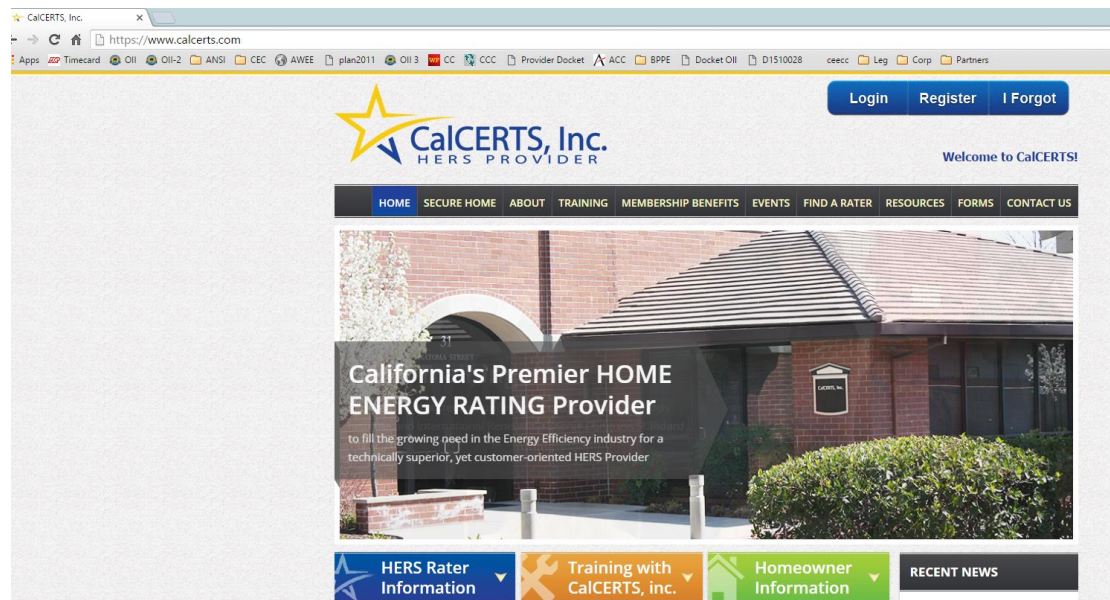
Registry Overview

User Registration

- To register as a user within the CalCERTS registry go to www.calcerts.com and select

Register

Register









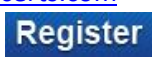
- The registration process differs depending on the type of user. Select the appropriate process based on user type.




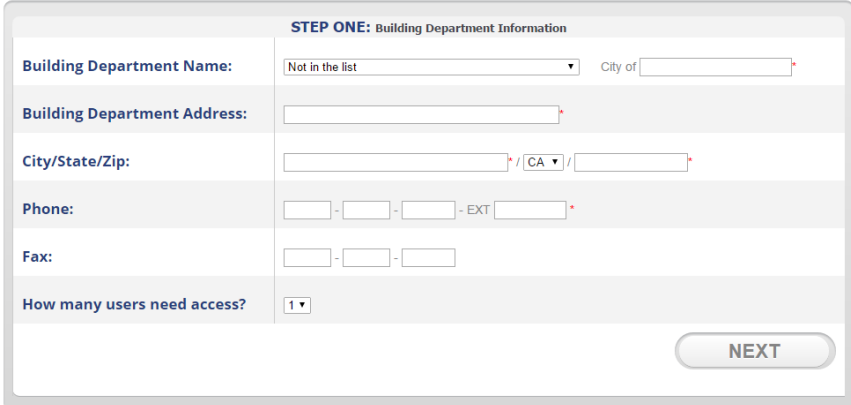
In order to get you to the correct Registration Process, please identify your business:

I want to signup for a certification class and I need a Training Account	
I am a BUILDER/ARCHITECT of New Construction Homes needing to register and/or approve CF1Rs	
I am an ENERGY CONSULTANT or a DESIGNER needing to Register CF1Rs for New Construction	
I am a CONTRACTING INSTALLER with a valid CSLB License needing to Register CF1R-ALT-HVAC AND/OR process Installation Certificate CF-6R or CF-2R forms.	
I am a HOME OWNER	
I am a BUILDING DEPARTMENT/ENFORCEMENT AGENCY for a City or County	

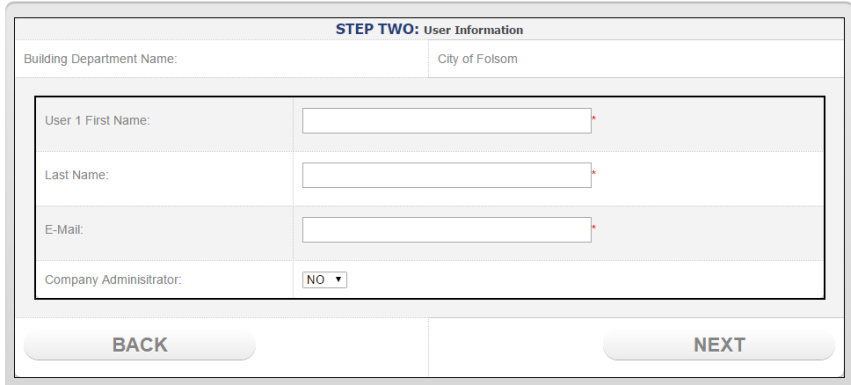
If none of these apply to you please contact our office directly.

- **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 **Register**  located in the upper right of our home page

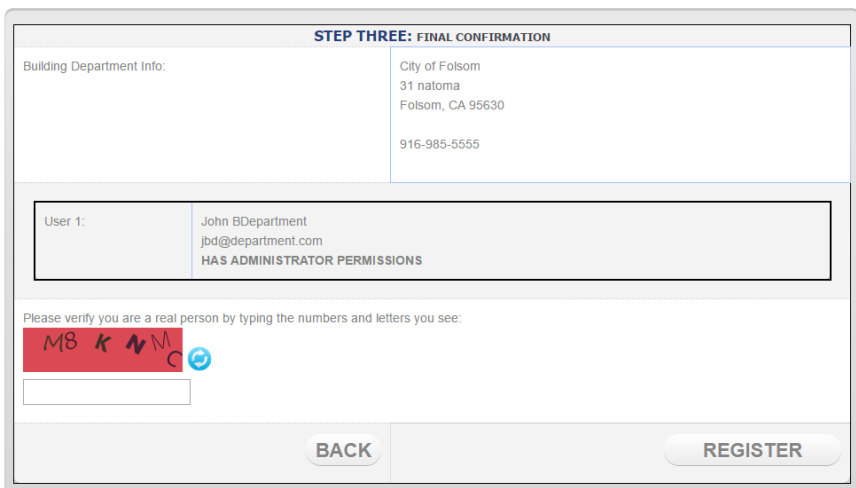
- Click the **Register** icon  located to the right of **I am a BUILDING-DEPARTMENT/ENFORCEMENT-AGENCY for a City or County**
- Input the required information for **Step One** and Click **NEXT**:
- – *You can register as many users needed within your Building Department.*



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



- Verify the information is accurate, input the required message for the **THIRD and FINAL** step and Click **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 tech@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.

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.

- [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 Info** link.
- Locate **My Signature:** in the information box, and select the **Click Here** link.

My Signature: Your signature file has been rejected, please provide a new one.
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**

Signature Option: Font Style

Name: Johnny Rater

Please select one of the following fonts:

☐ A: *Johnny Rater*

☒ B: *Johnny Rater*

☐ C: *Johnny Rater*

[Save Choice](#)

Your APPROVED Signature looks like this:

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.

Signature Option: Website Capture

Name: Johnny Rater

Using your mouse, draw your signature below:

Johnny Rater

Sign above

[Clear](#)

[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.

Signature Option: Scanned Image

Name: Johnny Rater

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)
3. Upload it below

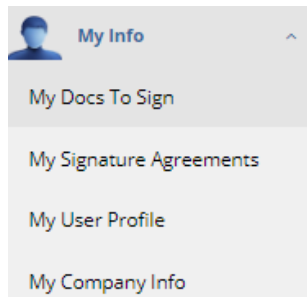
Upload File: To update your signature, select a file:

[Choose File](#) No file chosen

[Upload File](#)

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.
- 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?

[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

[\[Start Over\]](#)

2016 YEAR STANDARDS

Installation Certificate Signature Agreements:

CalCERTS Customer that can sign/approve on your behalf:

NONE

Users that have given YOU 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

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

2016 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 Presentative, 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

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

2016 YEAR STANDARDS

CE-28 Signature Agreement

John Rater's HVAC 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 (CFIRs) on my behalf.
- I acknowledge that the legal responsibility for construction or installation in the applicable jurisdiction 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 **John Rater's HVAC**.

- 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.

www.calcerts.com says:

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

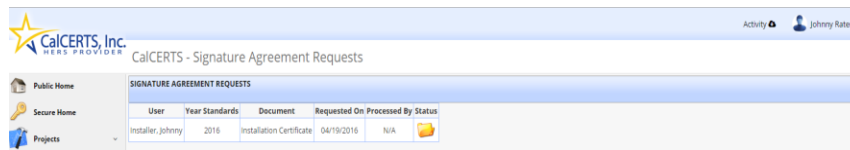
■ **To Accept Signature Authority**

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

YOU HAVE ALERTS

- There are 2 Signature Authority Request(s) needing approval. [Click Here](#) to view.
- You have 1 requested Project transfer(s). [Click Here](#) to view.
- You have 1 requested Plan (CF-1R) 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 requested as an **Untest**.
 - To request an **Untest**, Open the applicable lot or address and select **Actions** then select **Request Untest** .
 - Input the required information such as form name and the reason for the untest then select **Send Request**.

Untest Request For: Project "Simple ALT02":

Project Type:	Alterations Residential
Project:	922181 - Simple ALT02
Company Controlling the Project:	CalCERTS, Inc.
Address:	31 Natoma Suite 120, Folsom, CA 95630
Requestor:	Johnny Rater
Requesting Company:	CalCERTS, Inc.


Include ALL of the following information in the fields below:

1. **Exactly** which forms need to be untested (Example: All CF-3Rs, or Only Mech 20 CF-2R)
2. The **exact reason** for the untest

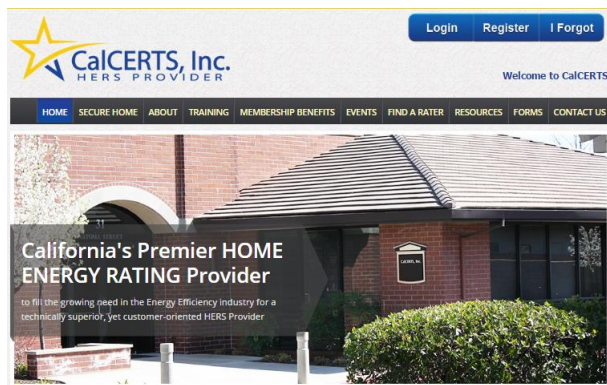
List ALL Forms to Untest:


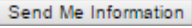
Exact Reason for Untest:

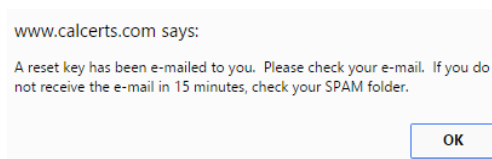
Send Request

- Once the Request has been submitted, Tech Support will review the request and submit a response via email once approved.
- 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**. If the **Resubmit** icon is grayed out on a CF2R form, then the form cannot be resubmitted until the CF3R has been untested.

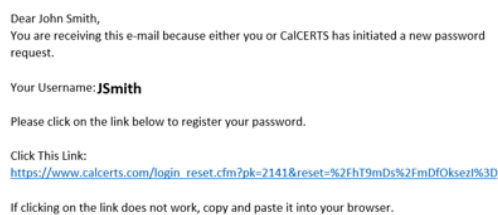
Recover or Reset Password



- Visit www.calcerts.com
- Click **I Forgot** 
- 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 Tech@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.*



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



- 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

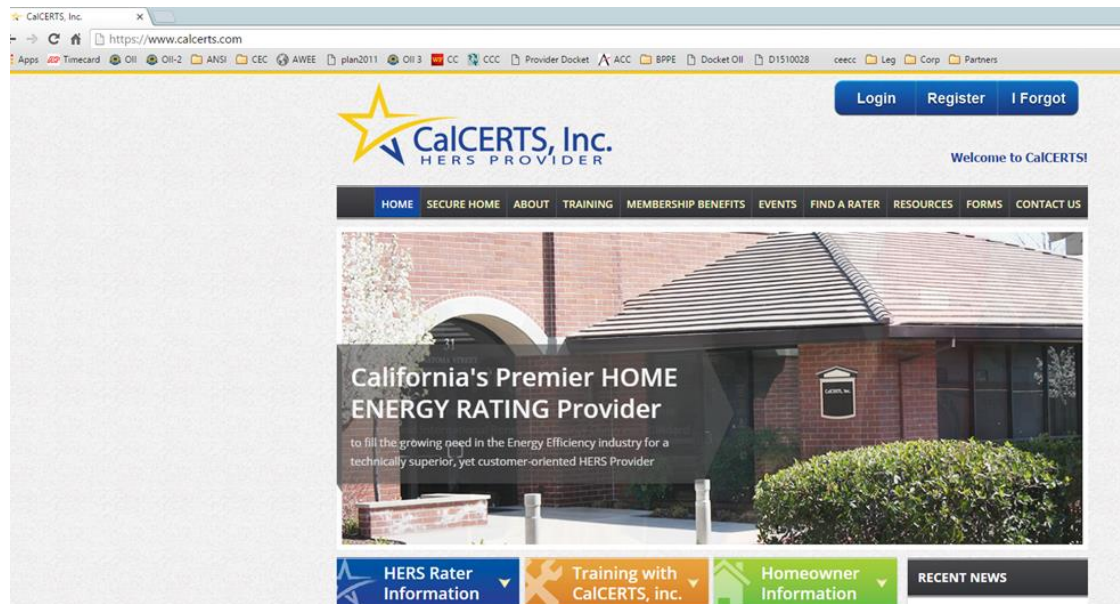
New Password:

Verify New Password:

Set 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 bar.
 - 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
- Single Family Residence (SFR) - Multi-Orientation (Subdivision, Planned Neighborhood, etc)				
- Single Family Residence (SFR) - SINGLE ADDRESS <i>CF1R-NCB-01 or Performance Calculation File</i>				
- Single Family Residence (SFR) - SINGLE ADDRESS ADDITION ONLY <i>CF1R-ADD-01</i>	N/A	N/A		
- Multi-Family Residence (MFR)				
- Multi-Family Residence (MFR) - SINGLE BUILDING PRESCRIPTIVE ONLY <i>New Construction (CF1R-NCB-01) OR Addition (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 2016 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 
- Next you can click directly on the [CLICK HERE](#) link for 2016 Code or Input the Permit Date if applicable.

If you have a permit number from a building department please enter the date the permit was issued. Otherwise please use today's date.

(*note dates before 07-01-2014 fall under the 2008 code standards)

OR

[\[CLICK HERE\]](#) for 2013 Code Standards Project

[\[CLICK HERE\]](#) for 2016 Code Standards Project

- Once you input the Permit Date or Click on the year standard, the applicable energy efficiency standards will be identified.

If you have a permit number from a building department please enter the date the permit was issued. Otherwise please use today's date.





01/01/2017


(*note dates before 07-01-2014 fall under the 2008 code standards)


2016 Standards

*** **ATTENTION** *** Check with your local code enforcement agency for what Standards to be using.

The effective date for 2016 Code Standards is 1/1/2017.

Project Type	2016 Code Standards
- Prescriptive Residential Alterations <i>CF1R-ALT-01 (Whole House)</i>	
- Prescriptive Residential Alterations (Space Conditioning Systems) <i>CF1R-ALT-02</i> <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) 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) <i>CF1R-ALT-02</i> <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>	
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- 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 2016 Prescriptive Approach Alteration Project	
Project Name:	<input type="text"/>
Street Address	<input type="text"/>
Zip Code:	<input type="text"/> <small>Must be a valid integer</small>
	<small>Must be a valid zip code.</small>
City	<input type="text"/>
Enforcement Agency / Building Department	<input type="text"/>
Project Type:	Single Family
<input type="button" value="CREATE PROJECT"/>	

- Select **Create Project** 

○ **New Construction – Non-Residential**

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

Create New 2016 Non-Residential New Construction Project		
Project Name:	<input type="text"/>	
Project Zip Code:	<input type="text"/>	<i>Must be a valid integer</i>
Number of NRCV-MCH-04s required:	<input type="text" value="1"/>	<i>Use a positive number.</i>
NRCV-MCH-04 Installer CSLB:	<input type="text"/>	<i>Must be a valid integer</i>
Will NRCV-PLB-22s be required for this project?	<input type="text" value="No"/>	
NRCV-PLB-22 Installer CSLB:	N/A	
<input type="button" value="CREATE PROJECT"/>		


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


www.calcerts.com says:


Project Created.

OK

○ **Alterations – Non-Residential**

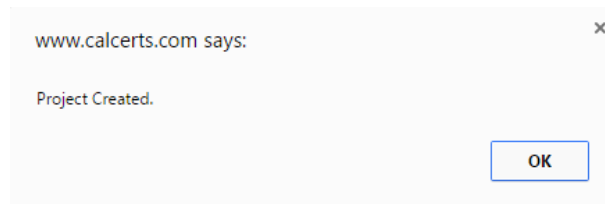
- Click the **New Project – Non-Residential** icon .
- Here you will input required information such as a CSLB License number, Project Name, and Zip Code.

 Project Home (ID: 0)


Create New 2013 Non-Residential Alteration Project		
Project Name:	<input type="text"/>	
Project Zip Code:	<input type="text"/>	<i>Must be a valid integer</i>
Number of NRCV-MCH-04s required:	<input type="text"/>	<i>Use a positive number.</i>
NRCV-MCH-04 Installer CSLB:	<input type="text"/>	<i>Must be a valid integer</i>
Is a NRCV-PLB-21s required?	<input type="text" value="No"/>	
NRCV-PLB-21 Installer CSLB:	N/A	
<input type="button" value="CREATE PROJECT"/>		

- 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

 A screenshot of a web form titled 'Create Home Energy Rating'. The form has three main sections:

- CREATE A DRAFT CalRATEPro REPORT**: Includes a description and an upload section for a ZIP file from the Energy Calculation Program (CalRatePro through EnergyPro 5). It has 'Browse...' and 'Upload' buttons.
- CREATE NEW HOME ENERGY PROJECT**: Includes a description and two radio button options: 'Completely New Project (EEM or Original Whole House Rating)' and 'Whole House Improved Rating (Test Out)'. It has a 'START WIZARD' button.
- CREATE NEW HOME ENERGY PROJECT FOR MULTI-FAMILY (PILOT PROGRAM)**: Includes a description and two radio button options: 'Completely New Multi-Family Whole House Rating Project (Test In)' and 'Multi-Family Whole House Improved Rating (Test Out)'. It has a 'START WIZARD' button.

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 [Alterations - Residential](#)
- 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 visiting.*
- Note: You can hover over any of the icons in order for the verbiage of what the icon is to prompt.*
- Input the date of when the Permit was issued:

If you have a permit number from a building department please enter the date the permit was issued. Otherwise please use today's date.


01/31/2017

(*note dates before 07-01-2014 fall under the 2008 code standards)

OR

[\[CLICK HERE\]](#) for 2013 Code Standards Project

[\[CLICK HERE\]](#) for 2016 Code Standards Project

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

If you have a permit number from a building department please enter the date the permit was issued. Otherwise please use today's date.





01/01/2017

(*note dates before 07-01-2014 fall under the 2008 code standards)

2016 Standards

***** ATTENTION ***** Check with your local code enforcement agency for what Standards to be using.

The effective date for 2016 Code Standards is 1/1/2017.

Project Type	2016 Code Standards
- Prescriptive Residential Alterations <i>CF1R-ALT-01 (Whole House)</i>	
- Prescriptive Residential Alterations (Space Conditioning Systems) <i>CF1R-ALT-02</i> <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) 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)	

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

► STEP 1 / STEP 2 / STEP 3 / STEP 4

A. GENERAL INFORMATION

Installer (This list comes from your My Installers list)

Project Name	DEV INSTALLERS & (137345)
Street Address	Natomas Residence
Zip Code	95630
City	Folsom
Building Department	Folsom (City)
Building Type	Single Family
Square Footage	1200
Climate Zone	12
Is this a system with a SINGLE OUTDOOR section and TWO OR MORE INDOOR sections? (for example a Multiple Split or VRF system)	<input type="button" value="No"/>
Number of space conditioning (SC) systems	1
IF MORE THAN ONE SYSTEM, will ALL of these systems be IDENTICAL?	<input type="button" value="No"/>

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

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

B. Space Conditioning (SC) System Information	
SC System 1	
01 System Name	System 1
02 System Area Served	Location 1
03 Floor Area served by System	1200
04 Is the SC system a ducted system?	<input checked="" type="radio"/> Yes
05 Installing a refrigerant containing component?	<input type="radio"/> No
06 Installing new SC System components?	<input type="radio"/> No
07 Installing more than 40 feet of ducts OR Installing ANY length of duct with a new or complete replacement SC system?	<input type="radio"/> No
08 Installing entirely new duct system?	<input type="radio"/> No
09 Installing entirely new SC system?	<input type="radio"/> No
BACK NEXT	

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


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

SYSTEM EXEMPT	
01 System Name	System 1
BACK NEXT	


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

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

FINAL REVIEW									
A. GENERAL INFORMATION									
Installing Contractor:		DEV INSTALLERS & (137345)		Enforcement Agency:		City of Folsom			
01 Project Name:		Natoma Residence		02 Date Prepared:		2016-05-10			
03 Project Location:		31 Natoma Street		04 Building Type:		SF			
05 CA City:		Folsom		06 Dwelling Unit Name:		Natoma Residence			
07 Zip Code:		95630		08 Dwelling Unit CFA (ft2):		1200			
09 Climate Zone:		12		10 Number of SC Systems:		1			
B. Space Conditioning Information									
SC System Identification or Name	SC System Location or Area Served	CFA served by this SC System (ft2)	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	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No Alteration Performed
DOCUMENTATION AUTHOR									
Documentation Author Name:				Johnny Installer					
Documentation Author Company Name:				DEV INSTALLERS &					
CEA/HERS Certification Identification (if applicable):									
RESPONSIBLE PERSON									
Responsible Builder/Installer Name:				Installer, Johnny					
Company Name:				DEV INSTALLERS &					
BACK SUBMIT									

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


Thank for registering your CF1R-ALT-02 with CalCERTS!

CF1R Registered Information:	
CEC Registration Number	216-A0173965A-000000000-0000
Project Information	Natoma Residence 31 Natoma Street Folsom, 95630
Number of Systems	1
Documentation Author	Johnny Installer DEV INSTALLERS &
Responsible Person	Johnny Installer DEV INSTALLERS &
Certificate of Compliance	Download 
PDF Needs Verification	<p>This document is NOT official until your electronic signature has been applied.</p> <p>PDF Document needs verification before it can be official. Please review the PDF document.</p> <p><input type="checkbox"/> By checking this box, I certify that I have reviewed and approve the PDF Document. Check the box and click "APPROVE" if you approve the PDF as being accurate.</p> <p>APPROVE</p>
What's next?	
<ul style="list-style-type: none"> Assign a HERS Rater Work with System 1 	

- Click **APPROVE**


- *Note: If the Responsible Person is different from the Documentation Author, both parties will have to log in and sign in order.*

Thank for registering your CF1R-ALT-02 with CalCERTS!

CF1R Registered Information:	
CEC Registration Number	216-A0173965A-000000000-0000
Project Information	Natoma Residence 31 Natoma Street Folsom, 95630
Number of Systems	1
Documentation Author	Johnny Installer DEV INSTALLERS & 2016-05-10 11:17:10
Responsible Person	Johnny Installer DEV INSTALLERS & 2016-05-10 11:17:10
Certificate of Compliance	Download 

What's next?

- [Assign a HERS Rater](#)
- [Work with System 1](#)


- Click the **PDF** icon  to access the official CF1R and close once complete.
- Click **Assign a HERS Rater** [Assign a HERS Rater](#)
- *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](#)

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.*

Thank for registering your CF1R-ALT-02 with CalCERTS!

CF1R Registered Information:	
CEC Registration Number	216-A0173965A-000000000-0000
Project Information	Natoma Residence 31 Natoma Street Folsom, 95630
Number of Systems	1
Documentation Author	Johnny Installer DEV INSTALLERS & 2016-05-10 11:17:10
Responsible Person	Johnny Installer DEV INSTALLERS & 2016-05-10 11:17:10
Certificate of Compliance	Download 

What's next?

- A request to assign project to CalCERTS, Inc. Exists. [Assign a DIFFERENT HERS Rater](#)
- [Work with System 1](#)

- Click **Work with System 1** [Work with System 1](#)
- Input the required information and Click **SAVE** [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 the **ProjectRoadmap** link located at the top of your Project Home page and



- Click the **CF2R** link
- Click the **Report Results** link [Report Results](#) for the CF2R-MCH-01-H.



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: Complete		
<div>TAB VIEW ⓘ</div>									
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	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	Installer, Johnny ▼
Company Name	DEV INSTALLERS & ▼
Position With Company:	<input type="text"/>

- Click **SUBMIT** [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 **Report Results** [Report Results](#) located to the right of the CF2R you would like to submit.
- 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	Installer, Johnny ▼
Company Name	DEV INSTALLERS & ▼
Position With Company:	<input type="text"/>

- Click **Submit** [SUBMIT](#)
- 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**.*

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


The transaction is completed.

An e-mail has been sent to general@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: 913284
Order Date: 5/10/2016 12:15 PST
Starting Balance: \$5,182.00
Amount on Invoice: \$1.00
New Balance: \$5,181.00

Description	Unit Price	QTY	\$
Installation Certificate: 31 Natoma Street (PROJECT ID: 798135 LOT ID: 890461) (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 and Clicking **Approve PDF** [Approve PDF](#)
- Note:** Click the **PDF** icon  to review any documents before approving them.
- Click the check boxes 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

798135

Natoma Residence

890461

System 1

31 Natoma Street

T24: [Working](#)

T24: [Working](#)


*** 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](#)



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 	Done	<div><div>Download</div><div></div><div>Refresh</div><div></div></div>	<input checked="" type="checkbox"/>	Johnny Installer (DEV INSTALLERS &) Needs to Sign	Johnny Installer (DEV INSTALLERS &) Needs to Sign
1117535	System 1	Duct Leakage	CF2R-MCH-20	PDF Needs Approval 	CF3R	<div><div>Download</div><div></div><div>Refresh</div><div></div></div>	<input checked="" type="checkbox"/>	Johnny Installer (DEV INSTALLERS &) Needs to Sign	Johnny Installer (DEV INSTALLERS &) Needs to Sign

*** 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 PDF** [Approve PDF](#)
- Note:** Next you can Sample if applicable. This is an optional step and only applies to projects needing Sampling.



- Click the **ProjectRoadmap** link



- Click the **Sample** link
- 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 checked="" type="radio"/> Yes
373990	850 COLD CANYON RD	LINDA KOVAR	SYSTEM 1	Calabasas	91302		<input type="radio"/> No

- Click **NEXT** [NEXT](#)

Project ID	Project Name	Address	System Name	City	Zip
371101	42031 VILLAGE 42	JEANNINE & STEVEN RYAN	SYSTEM 1	Camarillo	93012
769508	491 23rd Street	ANTHONY HEARN	System 1	Santa Monica	90402
BACK		CREATE GROUP			

- Click **CREATE GROUP** [CREATE GROUP](#)

- Click **OK** to confirm group has been created.
- *Note: Next The CF3Rs can be registered.*



- Click the **ProjectRoadmap** link



- Click the **CF3R** link
- 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 **Company Name**.

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

- Click **SUBMIT** [SUBMIT](#)
- *Note: Next you can input any remaining CF3Rs by Clicking **Report Results***

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
776079	Mizo Residence	System 2

[\[TAB VIEW\]](#) ⓘ

Features of Project Systems being reported:

Tested Feature	Form Name	Tested System	CF2R Status	CF2R 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 Download Refresh	Signed	Johnny Rater (CalCERTS, Inc.) Signed 03-30-16	Johnny Rater (CalCERTS, Inc.) Signed 03-30-16
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 located under Document Status.
- Click **Approve PDF** [Approve PDF](#)
- *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 [Projects](#) located on the left side menu bar.
- Click the **Alterations - Residential** link [Alterations - Residential](#)
- Click the **New Alteration Project** icon

- Input the date of when the Permit was issued:

If you have a permit number from a building department please enter the date the permit was issued. Otherwise please use today's date.

01/31/2017


(*note dates before 07-01-2014 fall under the 2008 code standards)

OR

[\[CLICK HERE\]](#) for 2013 Code Standards Project

[\[CLICK HERE\]](#) for 2016 Code Standards Project

- Click **NEXT**

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





If you have a permit number from a building department please enter the date the permit was issued. Otherwise please use today's date.

01/01/2017

(*note dates before 07-01-2014 fall under the 2008 code standards)

2016 Standards

***** ATTENTION ***** Check with your local code enforcement agency for what Standards to be using.
The effective date for 2016 Code Standards is 1/1/2017.

Project Type	2016 Code Standards
- Prescriptive Residential Alterations <i>CF1R-AL T-01 (Whole House)</i>	
- Prescriptive Residential Alterations (Space Conditioning Systems) <i>CF1R-AL T-02</i> <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) 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 2016 Performance Existing + Alteration/Addition 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 If this is an **ADDITION ONLY** Project, you must create it in [New Construction](#)

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

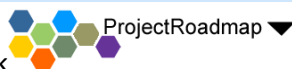
www.calcerts.com says:

Project Created.

- Input the required 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) Edit
Project Type:	Single Family
Project Name:	Mizo Residence - System 1 (ID: 950512)
Project Address:	31 Natoma St Edit
Project City/State/Zip:	Folsom, CA 95630 Edit
Company Controlling Project:	CalCERTS, Inc.
Building Department:	City of Folsom Edit
Permit Number/Date:	123456 - 01/31/2017 <small>Permit # and Permit Date is Required BEFORE CF2Rs can be registered</small>
Status:	Active ▼
Homeowner Name:	Bob Owner
Homeowner Phone:	916-555-5555
Alternate Phone Number:	



- Click the **ProjectRoadmap** link located at the top of your Project Home Page


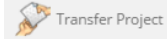




- Click the **CF1R** link
- Note: The page will automatically default to the Energy Calculation File tab and the option of Choose File or Browse will depend on what browser you're using.*
- Click the **Choose File** link [Choose File](#) OR Click the **Browse** link [Browse...](#)


Performance CF1R	
Plan ID:	1153568
CEC Registration #:	216-A0100117A-000000000-0000
Energy Calculation File Tests System Names Sign Off	
Choose File No file chosen	
Please select an Energy Calculation file to upload.	
Save Changes	

- Locate the .xml file and Click the **Save Changes** link [Save Changes](#)
- Click **OK** to confirm your Plan has been uploaded.
- Click the **Sign Off** tab.
- Note: 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.*

Performance CF1R	
Plan ID:	1153568
CEC Registration #:	216-A0100117B-000000000-0000
DRAFT CF1R Document:	
Energy Calculation File Tests System Names Sign Off	
DOCUMENTATION AUTHOR - Alert: Needs Signature	
Documentation Author:	Rater, Johnny ▼
Documentation Author Company Name:	CalCERTS, Inc. ▼
CEA/HERS Certification Identification:	If applicable
RESPONSIBLE DESIGNER - Alert: Needs Signature	
Responsible Designer Name:	Rater, Johnny ▼
Responsible Designer Company Name:	CalCERTS, Inc. ▼
Designer's License:	na 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	

- *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:*
 - Going back to the Project Home Page.
 - Click the **Actions** link  located in the upper right of the project.
 - Click **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***  *link.*
 - *Note: The check box, in order to maintain shared access, will automatically be checked.*
 - Click **Transfer** .

Project Transfer: Mizo Residence

 **Authorized Companies to Transfer:**

Select the Company you want to transfer this project to, then click the 'Transfer' button.

▼

☒ Check this box if after transfer, you wish to maintain shared view to project.

HERS RATER NOT ON THIS LIST? Add them here [My Raters](#)

- *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:

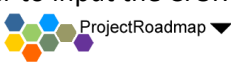

Project: [Mizo Residence](#)



From: CalCERTS, Inc.

To: CalCERTS, Inc.


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


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

- Click on your project name highlighted in blue which will take you back to the project home page and use the ProjectRoadmap to navigate.
- Here you will have two options in order to input the CF3R-EXC-20:
 - Click the **ProjectRoadmap** link 
 - Click the **CF3R** link 
 - Click **Report Results** [Report Results](#) located to the right of the CF3R-EXC-20
 - **OR**
 - Click the **ProjectRoadmap** link 
 - Click the **CF1R** link 
 - Click the [\[CLICK HERE\]](#) link to record the CF3R-EXC-20.

- Input the CF3R-EXC-20 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	Rater, Johnny (USR999999) 
HERS Rater Company Name	CalCERTS, Inc. 



- Click **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	Lat ID	Address	Sample Group	Overall CF3R Status	Overall CF3R Status
781158	Miss Residence	854100	31 Natomia St (System 1)		T2K Working	T2K Working

Linked Project(s)

Project ID	Project Name	System Name
228079	Miss 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 Natomia St (System 1)	N/A	Complete 	Payment Required			Johnny Rater (CalCERTS, Inc.)	Johnny Rater (CalCERTS, Inc.)

IAQ and MV

Form Name	Tested System	CF3R Status	CF3R Status	Next Step
CF3R-MCH-27	31 Natomia 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 ID	Project Name	Lat ID	Address	Sample Group	Overall CF3R Status	Overall CF3R Status
781158	Miss Residence	854100	31 Natomia St (System 1)		T2K Working	T2K Working



Linked Project(s)

Project ID	Project Name	System Name
228079	Miss 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.



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 Natomia St (System 1)	N/A	Complete 	PDF Needs Approval	[Link To Data Array] SHOW ALL 	<input type="checkbox"/>	Johnny Rater (CalCERTS, Inc.)	Johnny Rater (CalCERTS, Inc.)

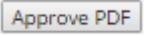
IAQ and MV

Form Name	Tested System	CF3R Status	CF3R Status	Next Step
CF3R-MCH-27	31 Natomia St (System 1)	REQUIRED	Not Started	Complete all CF3Rs first

*** 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.



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




- Click the **ProjectRoadmap** link



- Click the **CF1R** link
- 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: 1153568
CEC Registration #: 216-A0100117A-000000000-0000
DRAFT CF1R Document: 

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

DOCUMENTATION AUTHOR - Alert: Needs Signature

Documentation Author: TBD
Documentation Author Company Name: TBD
CEA/HERS Certification Identification: If applicable


RESPONSIBLE DESIGNER - Alert: Needs Signature

Responsible Designer Name: TBD
Responsible Designer Company Name: TBD
Designer's License: Required before PDF can be signed.

[Save Changes](#)

- Click the **Save Changes** link [Save Changes](#)

Performance CF1R

Plan ID: 1153568
CEC Registration #: 216-A0100117A-000000000-0000
DRAFT CF1R Document: 

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


DOCUMENTATION AUTHOR - Alert: Needs Signature

Documentation Author: Rater, Johnny
Documentation Author Company Name: CalCERTS, Inc.
CEA/HERS Certification Identification: If applicable

RESPONSIBLE DESIGNER - Alert: Needs Signature

Responsible Designer Name: Rater, Johnny
Responsible Designer Company Name: CalCERTS, Inc.
Designer's License: na Required before PDF can be signed.


[Save Changes](#)

- 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. [APPROVE PDF](#)

- Click the **APPROVE PDF** link 

Performance CF1R

Plan ID: 1153568
CEC Registration #: 216-A0100117A-00000000-0000
DRAFT CF1R Document: 

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

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.

DRAFT DOCUMENT SIGN OFF

DRAFT CF1R PDF



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 CF1R, please check the box below and click the APPROVE PDF Button.

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

[Save Changes](#)

- 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: 1153568
CEC Registration #: 216-A0100117A-00000000-0000
Official CF1R Document:  

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


DOCUMENTATION AUTHOR - Signed

Signed By: Johnny Rater
Company: CalCERTS, Inc.
CEA/HERS Certification Identification:
Signed On: 2016-03-16 11:21:41

RESPONSIBLE DESIGNER - Signed REMOVE SIGNATURE

Signed By: Johnny Rater
Company: CalCERTS, Inc.
Designer's License: na
Signed On: 2016-03-16 11:21:41

[Save Changes](#)

- 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*


CF-1R Payment Processing


Plans for Project: **Mizo Residence**

Select the Plans you wish to pay for:

ID	Project Name	Plan Name	CEC Registration	Plan Type	Pay
1153568	Mizo Residence	ADD Parent	216-A0100117A	Standard	<input checked="" type="checkbox"/>

[NEXT](#)

- 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 the **ProjectRoadmap** link 

CF2R

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

CF2R Please select the CF2Rs to complete below.

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF2R Status
767158	Miso Residence	854160	System 1	31 Natomia St	T24	Working	Working

Linked Project(s)

Project ID	Project Name	System Name
776079	Miso Residence	System 2

[TAB 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-H	Not Started	Report Results				
		Penetration Installation	CF2R-ENV-01	Not Started	Report Results				
		Envelope Air Sealing	CF2R-ENV-02	Not Started	Report Results				
		Insulation Installation	CF2R-ENV-03	Not Started	Report Results				
		IAQ and MV	CF2R-MCH-27	Complete MCH01 first	Complete MCH01 first				

- 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](#)

CF2R Please select the CF2Rs to complete below.

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF2R Status
767158	Miso Residence	854160	System 1	31 Natomia St	T24	Working	Working

Linked Project(s)

Project ID	Project Name	System Name
776079	Miso Residence	System 2

[TAB VIEW](#) ⓘ

System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Unseal	Document	Document Status	Documentation Author	Responsible Person
		Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01-H	Complete	Done	REVIEW MCH01	LINK TO Data Array SHOW XML Errors Download	Signed	Johnny Riser (CARCITE, Inc.) Signed 03-30-16	Johnny Installer (DEV INSTALLERS &) Signed 03-30-16
		Penetration Installation	CF2R-ENV-01	Not Started	Report Results					
		Envelope Air Sealing	CF2R-ENV-02	Not Started	Report Results					
		Insulation Installation	CF2R-ENV-03	Not Started	Report Results					
1067158	System 1	Duct Leakage	CF2R-MCH-20	Working	Report Results					
1067158	System 1	Ducts Located In Conditioned Space	CF2R-MCH-21	Not Required	Not Required					
1067158	System 1	Airflow	CF2R-MCH-23	Not Required	Not Required					
1067158	System 1	Fan Efficacy	CF2R-MCH-22	Not Required	Not Required					
1067158	System 1	Return Duct Design	CF2R-MCH-28	Not Required	Not Required					
1067158	System 1	Refrigerant Charge	CF2R-MCH-25	Not Required	Not Required					
1067158	System 1	Rated Equipment	CF2R-MCH-26	Not Required	Not Required					
1067158	System 1	IAQ and MV	CF2R-MCH-27	Not Started	Report Results					
1067158	System 1	Surface Area R-Value, Buried Ducts	CF2R-MCH-29	Not Required	Not Required					
1067158	System 1	Ventilation Cooling Credit	CF2R-MCH-30	Not Required	Not Required					

- 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

CF2R

Please select the CF2Rs to complete below.

PDF Merge (get all signed documents on this page in one file)

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

Linked Project(s)

Project ID	Project Name	System Name
776079	Miso Residence	System 2

TAB 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-M	Complete	Done	Show XML Errors Download	Signed	Johnny Rater (CalCERTS, Inc.) Signed 03-30-16	Johnny Installer (DEV INSTALLERS &) Signed 03-30-16
		Penetration Installation	CF2R-ENV-01	Not Started	Report Results	Show XML Errors Download			
		Envelope Air Sealing	CF2R-ENV-02	Not Started	Report Results				
		Insulation Installation	CF2R-ENV-03	Not Started	Report Results				
1067158	System 1	Duct Leakage	CF2R-MCH-20	Complete	CF3R	Show XML Errors Download	Signed	Johnny Installer (DEV INSTALLERS &) Signed 03-31-16	Johnny Installer (DEV INSTALLERS &) Signed 03-31-16
1067158	System 1	Ducts Located in Conditioned Space	CF2R-MCH-21	Not Required	Not Required				
1067158	System 1	Airflow	CF2R-MCH-23	Not Required	Not Required				
1067158	System 1	Fan Efficiency	CF2R-MCH-22	Not Required	Not Required				
1067158	System 1	Return Duct Design	CF2R-MCH-28	Not Required	Not Required				

- Note: Next step is to input the CF3Rs.



- Click the **ProjectRoadmap** link



- Click the **CF3Rs** link

- 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 Builder/Installer Name** and **Company Name** and input the Position With Company


- Click **SUBMIT** [SUBMIT](#)

RESPONSIBLE PERSON

Responsible Rater Name

HERS Rater Company Name

- Note: Next you can input any remaining CF3Rs by Clicking [Report Results](#)


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
776079	Mizo Residence	System 2


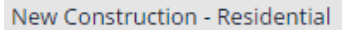



TAB VIEW

















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-EVC-20	31 Natoma St (System 1)	N/A	Complete	Done		[LINK TO Data Array] SHOW XML Errors <div>Download</div> <div>Refresh</div>	Signed	Johnny Rater (CalCERTS, Inc.) Signed 03-30-16	Johnny Rater (CalCERTS, Inc.) Signed 03-30-16
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 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.

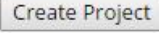
Residential New Construction

- Click the Projects link  Projects 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
- Single Family Residence (SFR) - Multi-Orientation (Subdivision, Planned Neighborhood, etc)				
- Single Family Residence (SFR) - SINGLE ADDRESS <i>CF1R-NCB-01 or Performance Calculation File</i>				
- Single Family Residence (SFR) - SINGLE ADDRESS ADDITION ONLY <i>CF1R-ADD-01</i>	N/A	N/A		
- Multi-Family Residence (MFR)				
- Multi-Family Residence (MFR) - SINGLE BUILDING PRESCRIPTIVE ONLY <i>New Construction (CF1R-NCB-01) OR Addition (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 2016 New Construction SINGLE FAMILY Multi-Orientation Project	
Project Name:	Barnes Residence
Project Type	Single Family Residence
Zip Code:	95630 <small>Required before ANY CF1R can be issued.</small>
Default Gas Utility:	SMUD
Default Electric Utility:	PG & E
<input type="button" value="Create Project"/>	

- 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 Lists**
 - Click **My Builders**
 - Click to select your Builder from the Master List and add them to your authorized list
 - Return to your project

2016 New Construction SINGLE FAMILY Multi-Orientation Project	
Company Controlling Project:	CalCERTS, Inc.
Project Name:	Barnes Residence
Project Type:	Single Family Residence
Builder:	Builder One <small>Required before ANY Installation Certificate can be issued.</small>
Builder Contact Name:	Johnny Builder <small>Required before ANY Installation Certificate can be issued.</small>
Builder Contact Phone:	916-985-3400 <small>Required before ANY Installation Certificate can be issued.</small>
Zip Code:	95630
Project Address 1:	31 Natoma St
Project Address 2:	
Project City:	Folsom
Building Department:	Folsom (City)
Default Gas Utility:	SMUD
Default Electric Utility:	PG & E
Project Superintendent:	Joe Super <small>Required before ANY Installation Certificate can be issued.</small>
Contact Phone Number:	916-555-5555 <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](#)
- Click **OK** to confirm your data has been saved.



- Click the **ProjectRoadmap** link



- 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)

Plan Name:

Barnes Plan

Gas Utility:

SMUD

Electric Utility:

PG & E

OTHER PROVIDER REGISTRATION:

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

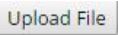

☐ This Plan File is from another HERS Provider.

Registration Number:

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

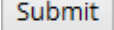
Create Plan

- 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 
 - *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.*


Select plan to be transferred

Test 3 (Plan ID: 435948)	▲
101011 plan (Plan ID: 460389)	
Test 1215739 (Plan ID: 1215739)	
Barnes Plan (Plan ID: 1225715)	▼

- Click the **SUBMIT** link 
- Click **OK** to transfer selected plans

Press OK to transfer selected plans

<input type="button" value="OK"/>	<input type="button" value="Cancel"/>
-----------------------------------	---------------------------------------

- *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.**

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:			<input type="text"/> If applicable	
RESPONSIBLE DESIGNER - Alert: Needs Signature				
Responsible Designer Name:			Consultant, Joe	
Responsible Designer Company Name:			Joe Consultant	
Designer's License:			NA Required before PDF can be signed.	
Save Changes				

- Click the **Save Changes** link [Save Changes](#)
- 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](#)

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:			<input type="text"/> If applicable	
RESPONSIBLE DESIGNER - Alert: Needs Signature				
Responsible Designer Name:			Consultant, Joe	
Responsible Designer Company Name:			Joe Consultant	
Designer's License:			NA Required before PDF can be signed.	
PDF DOCUMENT SIGN OFF				
DRAFT CFIR PDF				
NOTE: 1 Zone(s) have been defined and are serviced by 1 Space Conditioning System(s) Please be sure this is correct before proceeding.				
<input checked="" type="checkbox"/> I, Joe Consultant, 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 OFFICAL CFIR, please check the box below and click the APPROVE PDF Button.				
<input checked="" type="checkbox"/> I, Joe Consultant, APPROVE the above PDF file. APPROVE PDF				
Save Changes				

- 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**.**

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



- Click the **ProjectRoadmap** link



- Click the **LOTS** link



- Click the **NEW LOT** icon
- Input the lot information.

New Lot

Phase:

Lot Label: *This is typically the lot number.*

Address:

Zip:

City:

State:

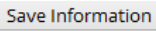




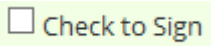



Gas Utility:



Electric Utility:

- Click the **ADD LOT** link
- Click **OK** to confirm Lot has been added.
- Input the Permit Number.
- Click the drop down to the right of Plan to select which Plan the lot should be linked to.
- Click the drop down to the right of Default Rater to select the Rater.
- Note: If this lot is the Model Home for the plan Click the greyed out **NO** link to switch to the green **YES** link*
- Note: Model homes are needed when Sampling.*


Edit Lot

Phase:	Phase 1	
Lot Label:	1	<small>This is typically the lot number.</small>
Address:	31 Natoma Street	
Zip:	95630	
City:	Folsom	
State:	CA	
Permit Number:	123456	<small>Required before any certifications are done.</small>
Plan: Go To Plan	Plan 1	
Gas Utility:	SMUD	
Electric Utility:	PG & E	
Default Rater:	Rater: Johnny (USR999999)	
Is this the Model Home for the plan (Initial Test)? <input checked="" type="checkbox"/> Yes		
SUPPLEMENTAL CF-2Rs		
Indicate which additional CF-2Rs are needed.		
CF2R-PLB-03	Pool and Spa	<input type="checkbox"/> No
Save Information		

- Click the **Save Information** link 
- Click **OK** to confirm your data has been saved.
- Click the **ProjectRoadmap** link 
- Click the **CF2R** link 
- Click **File Folder** icon  to the right of the lot you want to open
- Click the **Report Results** link  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 
- *Next you can Sample if applicable. This is an optional step and only applies to projects needing Sampling.*
- Click the **ProjectRoadmap** link 
- 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**


- 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.

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



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

- 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-testeded 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.

- *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
835495	Lot 22	Phase 1	Plan 435 - Windsor	14-03803	2807 Emerald Bay	Tulare	93274	215-01469	5	Sample Limit Reached
781023	Lot 27	Phase 1	Plan 1301	15-04707	2537 Emerald Bay Avenue	Tulare	93274	215-02025	4	
781022	Lot 27	Phase 1	Plan 435 - Windsor	15-04045	2545 Emerald Bay Avenue	Tulare	93274			
781028	Lot 22	Phase 1	Plan 105	15-05395	469 Nelder Grove Court	Tulare	93274			
832291	Lot 31	Phase 1	Plan 1301	15-05395	469 Nelder Grove Court	Tulare	93274			
832292	Lot 32	Phase 1	Plan 1052	15-04872	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:
 - Dust Leakage (544324 - CENTRAL AIR CONDITIONING INC)
 - Refrigerant Charge (544324 - CENTRAL AIR CONDITIONING INC)
 - Rated Equipment (544324 - CENTRAL AIR CONDITIONING INC)
 - IQ2 and MI (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
781018	Lot 22	469 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>
832291	Lot 31	469 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>
832292	Lot 32	472 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>

[NEXT](#)

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



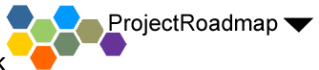

Tested Features:
 - Dust Leakage (544324 - CENTRAL AIR CONDITIONING INC)
 - Refrigerant Charge (544324 - CENTRAL AIR CONDITIONING INC)
 - Rated Equipment (544324 - CENTRAL AIR CONDITIONING INC)
 - IQ2 and MI (544324 - CENTRAL AIR CONDITIONING INC)
 - Airflow (544324 - CENTRAL AIR CONDITIONING INC)
 - Fan Efficiency (544324 - CENTRAL AIR CONDITIONING INC)

The following addresses will be associated to the above group:

ID	Lot Label	Address	City	Zip
781018	Lot 22	469 Nelder Grove Court	Tulare	93274


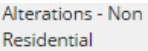

[BACK](#) [CREATE GROUP](#)

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

- Click the **ProjectRoadmap** link 
- Click the **CF3R** link 
- *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 **ProjectRoadmap** link 
- Click the **Payment** link 
- *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.*

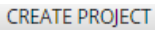
Non-Residential Alterations

*Note: There are no CF1Rs or CF2Rs equivalents for Non-Residential projects on CalCERTS. The only form certified through the registry is the NRCV-MCH-04. 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. 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 **Alterations Non-Residential** 
- 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 2016 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>
Number of NRCV-MCH-04s required:	<input type="text" value="1"/> <small>Use a positive number.</small>
NRCV-MCH-04 Installer CSLB:	<input type="text" value="137345"/> <small>Must be a valid integer</small>
Will NRCV-PLB-22s be required for this project?	<input type="text" value="No"/>
NRCV-PLB-22 Installer CSLB:	N/A
<input type="button" value="CREATE PROJECT"/>	

- Click **CREATE PROJECT** 
- 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	
Project Name:	<input type="text" value="The Shop"/>
Company Controlling Project:	CalCERTS, Inc.
Zip Code:	<input type="text" value="95630"/>
Project Address:	<input type="text" value="31 Natoma Street"/> <small>Required before ANY Certificate can be issued.</small>
Project City:	<input type="text" value="Folsom"/>
Building Department:	<input type="text" value="Folsom (City)"/>
Permit Number:	<input type="text" value="123456"/> <small>Required before ANY Certificate can be issued.</small>
Permit Date:	<input type="text" value="01/31/2017"/> <small>Date must be no greater than today and is required before ANY 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 Certificate can be issued.</small>
Contact Phone Number:	<input type="text" value="916-555-5555"/> <small>Required before ANY Certificate can be issued.</small>
NRCV-MCH Information	
NRCV-MCH Installer CSLB:	<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 Certificate can be issued.</small>
Installer Contact Phone:	<input type="text" value="916-985-3400"/> <small>Required before ANY Certificate can be issued.</small>
HVAC System Name:	<input type="text" value="System 1"/> <small>Required before ANY Certificate can be issued.</small>
HVAC System Location:	<input type="text" value="Attic"/> <small>Required before ANY Certificate can be issued.</small>
Status:	<input type="text" value="Active"/>
<input type="button" value="SAVE"/>	

- Click **SAVE** 
- Click **OK** to confirm your information has been saved.
- Click the **ProjectRoadmap** link 
- 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-Residential Sampling									
Project Name			The Shop (ID: 767065)						
Installing Contractor			DEV INSTALLERS & CLUB (137345)						
Tested Features			NRCV-MCH-04 (Batt Leakage)						
Create Sample Group (Associations)									
Select the HVAC system you wish to group together and click "NEXT".									
Project ID	Project Name	Address	System Name	File	File	File	File	File	Sample
356321	31 Natomia St	Multi - Natomia A1	System 1	File	File	File	File	File	<input type="button" value="No"/>
356322	31 Natomia St	Multi - Natomia A1	System 2	File	File	File	File	File	<input type="button" value="No"/>
356478	31 Natomia	Test Natomia A1	Test Natomia A1	File	File	File	File	File	<input type="button" value="No"/>
767065	31 Natomia	The Shop	System 1	File	File	File	File	File	<input type="button" value="Yes"/>

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

Non-Residential Sampling									
Project Name		The Shop (ID: 767065)							
Installing Contractor		DEV INSTALLERS & CLUB (137345)							
Tested Features		NRCV-MCH-04 Duct Leakage							
The following projects will be associated:									
Project ID	Project Name	Address	System Name	City	Zip				
326478	31 Natomia	Test Natomia A1	Test Natomia A1	Natomia	95010				
767065	31 Natomia	The Shop	System 1	Natomia	95010				
BACK	CREATE (ORD)								

- Confirm your selected group and Click **CREATE GROUP**
- Click **OK** to confirm your group has been created.



- Click



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

Project ID	Project Name	Unit ID	Address	Sample Group	Project Info
356321	The Shop	137345	31 Natomia Street (System 1)		Complete
Features of Project Systems being reported:					
Tested Features	Form Name	Tested System	Status	Next Step	Document
Batt Leakage	NRCV-MCH-04	31 Natomia Street (System 1)	Not Started	Report Results	Document Status

- Click **Report Results**
- Input results and 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**
- 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-MCH-04 located under Document Status.

Project ID	Project Name	Lot ID	Address	Sample Group	Project Info Complete
767065	The Shop	854035	31 Natoma (System 1)		Yes

Features of Project Systems being reported:

Tested Feature	Firm Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
Duct Leakage	NRCV-MCH-04	31 Natoma (System 1)	Complete	Done	Submit To Data Group SHOW DATA Errors Download Refresh	<input type="checkbox"/>	Johnny Rater (CACERTS, INC.)	Johnny Rater (CACERTS, INC.)

*** 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 PDF**
- *Note: Click the PDF icon to access the official registered NRCV-MCH-04.*

○ **100% Testing** → To Choose 100% Testing

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


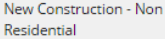

RESPONSIBLE PERSON	
Responsible Rater Name	Rater, Johnny (USR999999)
HERS Rater Company Name	CalCERTS, Inc.

- Click **SUBMIT**
- 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-MCH-04 located under Document Status.

- Click **Approve PDF**
- *Note: Click the PDF icon to access the official registered NRCV-MCH-04.*

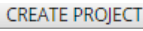
Non-Residential New Construction

There are no CF1Rs or CF2Rs equivalents for Non-Residential projects on CalCERTS. The only form certified through the registry is the NRCV-MCH-04. 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. 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.

Project Home (ID: 0)

Create New 2016 Non-Residential New Construction Project	
Project Name:	Main Street Inn
Project Zip Code:	95630 <small>Must be a valid integer</small>
Number of NRCV-MCH-04s required:	1 <small>Use a positive number.</small>
NRCV-MCH-04 Installer CSLB:	137345 <small>Must be a valid integer</small>
Will NRCV-PLB-22s be required for this project?	No
NRCV-PLB-22 Installer CSLB:	N/A
<input type="button" value="CREATE PROJECT"/>	

- Click **CREATE PROJECT** 
- 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	
Project Name:	Main Street Inn
Company Controlling Project:	CalCERTS, Inc.
Zip Code:	95630
Project Address:	31 Natoma Street <small>Required before ANY Certificate can be issued.</small>
Project City:	Folsom
Building Department:	Folsom (City)
Permit Number:	123456 <small>Required before ANY Certificate can be issued.</small>
Permit Date:	01/31/2017 <small>Date must be no greater than today and is required before ANY Certificate can be issued.</small>
Utility - GAS:	SMUD
Utility - ELECTRICITY:	PG & E
Project Construction Manager:	Johnny Manager <small>Required before ANY Certificate can be issued.</small>
Contact Phone Number:	916-555-5555 <small>Required before ANY Certificate can be issued.</small>
NRCV-MCH Information	
NRCV-MCH Installer CSLB:	137345 <small>Must be a valid integer</small>
NRCV-MCH Installer Company Name:	DEV INSTALLERS &
Installer Contact Name:	Johnny Installer <small>Required before ANY Certificate can be issued.</small>
Installer Contact Phone:	916-985-3400 <small>Required before ANY Certificate can be issued.</small>
HVAC System Name:	System 1 <small>Required before ANY Certificate can be issued.</small>
HVAC System Location:	Attic <small>Required before ANY Certificate can be issued.</small>
Status:	Active
<input type="button" value="SAVE"/>	

- Click **SAVE** 
- Click **OK** to confirm the information is saved.



- Click the **ProjectRoadmap** link
- 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-Residential Construction Sampling

Project Name

Installing Contractor

Tested Features

Create Sample Group (Associations)

The Shop (ID: 707005)

DEV INSTALLERS & (CLUB: 137345)

NRCV-MCH-04 Duct Leakage

Select the HVAC systems you wish to group together and click "NEXT"

Project ID	Project Name	Address	System Name	File	Size	Group	Sample
336431	31 Natoma St	Multi - NonRes A/E	System 1	Folium	\$5630		No
290522	31 Natoma St	Multi - NonRes A/E	System 2	Folium	\$5630		No
326478	31 Natoma	Test NonRes A/E	Test NonRes A/E	Folium	\$5630		No
707005	31 Natoma	The Shop	System 1	Folium	\$5630	YES	NEXT

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

Non-Residential Construction Sampling						
Project Name:		The Shop (ID: 707005)				
Installing Contractor:		DEV INSTALLERS & (CLUB: 137345)				
Tested Features:		NRCV-MCH-04 Duct Leakage				
The following projects will be associated:						
Project ID	Project Name	Address		System Name	File	Size
290522	31 Natoma St	Multi - NonRes A/E	System 1	Folium		\$5630
707005	31 Natoma	The Shop	System 1	Folium		\$5630
BACK						CREATE GROUP

- Confirm your selected group and Click **CREATE GROUP**
- Click **OK** to confirm your group has been created.




- Click 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				
548877	cyhry	678892	643743/Hy/Sr (System 1)		Yes				
Features of Project Systems being reported:									
Tested Feature	Farm Name	Tested System	Status	Next Step	Unitest	Document	Document Status	Documentation Author	Responsible Person
Duct Leakage	NRCV-MCH-04	643743/Hy/Sr (System 1)	Not Started	Report Results	N/A				

- Click **Report Results**
- Input results and 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**
- 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-MCH-04 located under Document Status.

Project ID	Project Name	Lot ID	Address	Sample Group	Project Info Complete
767065	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)	Complete 	Done	[LINK TO Data Array] SHOW XML Errors Download Reprint	<input type="checkbox"/>	Johnny Rater (CalCERTS, Inc.)	Johnny Rater (CalCERTS, Inc.)

***** 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.



- Click **Approve PDF**
- *Note: Click the **PDF** icon  to access the official registered NRCV-MCH-04.*

○ **100% Testing** → To choose 100% Testing



- Click the **NRCV** link for Non-Residential Certificates of Verification.
- 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 **SUBMIT**
- 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-MCH-04 located under Document Status.


Project ID	Project Name	Lot ID	Address	Sample Group	Project Info Complete
767065	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)	Complete	Done	LINK TO DATA Array SHOW XML Download Refresh	<input type="checkbox"/>	Johnny Rater (CACERTS, INC.)	Johnny Rater (CACERTS, INC.)

















***** 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.

- Click **Approve PDF**
- Note: Click the **PDF** icon  to access the official registered NRCV-MCH-04.

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
- Single Family Residence (SFR) - Multi-Orientation (Subdivision, Planned Neighborhood, etc)				
- Single Family Residence (SFR) - SINGLE ADDRESS CF1R-NCB-01 or Performance Calculation File				
- Single Family Residence (SFR) - SINGLE ADDRESS ADDITION ONLY CF1R-ADD-01	N/A	N/A		
- Multi-Family Residence (MFR)				
- Multi-Family Residence (MFR) - SINGLE BUILDING PRESCRIPTIVE ONLY New Construction (CF1R-NCB-01) OR Addition (CF1R-ADD-01)	N/A	N/A		

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

New 2016 New Construction MULTI-FAMILY Multi-Orientation Project	
Project Name:	<input type="text"/>
Project Type	Multi Family Residence <input type="button" value="v"/>
Zip Code:	<input type="text"/> <small>Required before ANY CF1R can be issued.</small>
Default Gas Utility:	None <input type="button" value="v"/>
Default Electric Utility:	None <input type="button" value="v"/>
<input type="button" value="Create Project"/>	

- 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.

 Project Home (ID: 951610)

2016 New Construction MULTI-FAMILY Project	
Company Controlling Project:	John Rater's HVAC
Project Name:	Amor Residence
Project Type:	Multi Family Residence
Builder:	Builder One <small>Required before ANY Installation Certificate can be issued.</small>
Builder Contact Name:	Johnny Builder <small>Required before ANY Installation Certificate can be issued.</small>
Builder Contact Phone:	916-555-5555 <small>Required before ANY Installation Certificate can be issued.</small>
Zip Code:	95630
Project Address 1:	31 Natoma Street
Project Address 2:	
Project City:	Folsom
Building Department:	Folsom (City)
Default Gas Utility:	SMUD
Default Electric Utility:	PG & E
Project Superintendent:	Johnny Super <small>Required before ANY Installation Certificate can be issued.</small>
Contact Phone Number:	916-985-3400 <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 Lists**
 - Click **My Builders**
 - Click to select your Builder from the Master List and add them to your authorized list
 - Return to your project
- Click **OK** to confirm your data has been saved.



- Click the **ProjectRoadmap** link



- 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)	
Plan Name: (Please do not use double or single quotes in the name)	Plan 1
Gas Utility:	SMUD
Electric Utility:	PG & E
OTHER PROVIDER REGISTRATION:	<input type="checkbox"/> Check this box if this plan is being transferred from another HERS Provider. <input type="checkbox"/> This Plan File is 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.

- Click the **Choose File** link [Choose File](#) OR Click the **Browse** link [Browse...](#)
 - *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 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
 - Click the dropdown to select the plan you would like to transfer into this project from your CF1R Bin:

- Click the Submit Link [Submit](#)

- 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.*

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:		<input type="text"/> If applicable		
RESPONSIBLE DESIGNER - Alert: Needs Signature				
Responsible Designer Name:		Consultant, Joe		
Responsible Designer Company Name:		Joe Consultant		
Designer's License:		NA Required before PDF can be signed.		
<input type="button" value="Save Changes"/>				

- 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 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**

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

Responsible Designer Name: Consultant, Joe

Responsible Designer Company Name: Joe Consultant

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

PDF DOCUMENT SIGN OFF

DRAFT CF1R PDF


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.

As the Documentation Author AND Responsible Designer, please review the above PDF file. If the file is accurate and you wish to create a FINAL AND OFFICIAL CF1R, please check the box below and click the APPROVE PDF Button.

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

Save Changes

- 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 **Buildings/Dwelling Units** [Buildings/Dwelling Units](#) within the CF1R page.
- Click the [\[CLICK HERE\]](#) 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 8 dwelling unit(s) so you can record CF2R and CF3R information, [\[CLICK HERE\]](#)


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, [\[CLICK HERE\]](#)


- Click **UNITS** [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.

Edit Dwelling Unit	
Dwelling Unit Name:	1stFirOneBR(1/2)
Address:	31 Natoma St
Zip:	95630
City:	Folsom
State:	CA
Permit Number:	123456 <small>Required before any certifications are done.</small>
Plan:	delete
Default Rater:	Rater, Johnny (USR999999)
Is this the Model Home for the plan (Initial Test)?	<input checked="" type="checkbox"/> Yes
Save Information	


- Click **Save Information** [Save Information](#)
- You can now access the Unit page by:

- Click the **ProjectRoadmap** link 

- Click the **UNITS** link 
- Click the **ProjectRoadmap** link 


- Click the **ProjectRoadmap** link

- Click the **CF2R** link 

- 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 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

- Scroll down and Click the **Approve PDF** link [Approve PDF](#)
- Next you can Sample if applicable. This is an optional step and only applies to projects needing Sampling.

- Click the **ProjectRoadmap** link 

- 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 **NEXT** 
- *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.

832188	783188	Lot 22	469 Nelder Grove Court	Tulare	93274	Yes
832291	832291	Lot 31	460 Nelder Grove Court	Tulare	93274	Yes
832292	832292	Lot 32	472 Nelder Grove Court	Tulare	93274	Yes

- 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		<input type="button" value="No"/>
832291	Lot 31	460 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:

- 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 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

- 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.

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
855245	Lot 22	Phase 1	Plan 435 - Windsor	14-03553	2887 Emerald Bay	Tulare	93274	215-01459	5	Sample Limit Reached
710103	Lot 27	Phase 1	Plan 120X	15-04707	2837 Emerald Bay Avenue	Tulare	93274	215-02328	4	
783182	Lot 33	Phase 1	Plan 435 - Windsor	15-04545	2545 Emerald Bay Avenue	Tulare	93274			
783188	Lot 32	Phase 1	Plan 155	15-05385	469 Nelder Grove Court	Tulare	93274			
832291	Lot 31	Phase 1	Plan 120X	15-05395	460 Nelder Grove Court	Tulare	93274			
832292	Lot 30	Phase 1	Plan 155G	15-04672	472 Nelder Grove Court	Tulare	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)
 - 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		<input type="button" value="No"/>
832291	Lot 31	460 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>
832292	Lot 32	472 Nelder Grove Court	Tulare	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)
 - 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


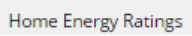

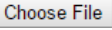

- Click **OK** to confirm group has been created.

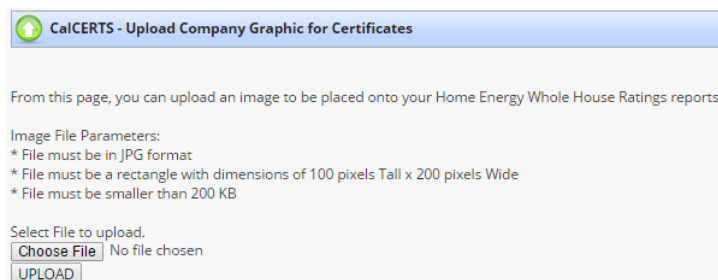
- Click the **ProjectRoadmap** link 
- Click the **CF3R** link 
 - The next step is to complete the CF3R forms used by the Rater for HERS Verification. These may include multiple CF3R-MCH, CF-3R-ENV, and CF3R-PLB forms.
 - NOTE After all test information has been entered into any form, CF1R, CF2R, or 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 **ProjectRoadmap** link 
- 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.

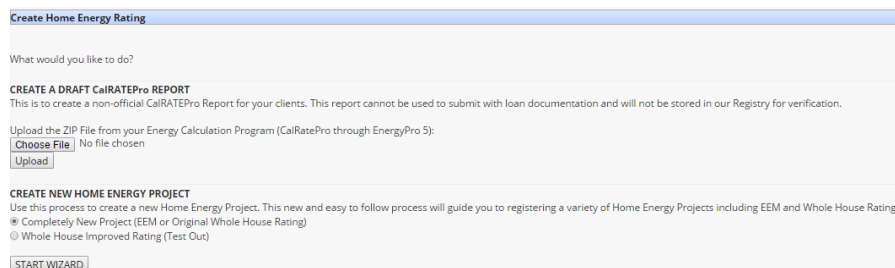
Home Energy Ratings

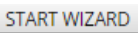
This walk through applies to both New Construction and Existing Homes.

- 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

STEP 1: Define Project General Information
In order to begin your project, please provide us with the following information:

Project Name: This can be any description you want for the project so that it is easy for you to find again in the future. Typically it is the last name of the customer.

Project TYPE: ☐ New Construction ☐ Existing Home

Customer First Name:

Customer Last Name:

Customer Phone: - -

Customer E-Mail:

Is this a BPC Project: Select From List

Assigned Rater: Rater, Johnny (USR999999)

Utility: Gas: Select From List Electricity: Select From List

[NEXT STEP](#)

- 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**.



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			<u>\$28.00</u>

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

[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			\$10.00

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

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

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

NSHP – Registering PV-1, PV-2 and PV-3s






Note: In order to Register PV-2 or PV-3 data for any building, a CF1R for Title 24 Compliance must already be uploaded to the Registry. For all building types except for Single Address, a lot must also be associated with the plan before you can proceed. PV-1 files may be uploaded to the Registry even if the Compliance CF1R hasn't been uploaded yet.

Lot ID	Lot Name	Address	Plan
907007	NSHP Test Lot	1234 Test Way	test plan

Plan (CF1R) for NSHP Test	
Plan ID:	1267851
CEC Registration #:	216-N0206976A-000000000-0000
Plan Name:	<input type="text" value="test plan"/>
Gas Utility:	<input type="text" value="None"/>
Electric Utility:	<input type="text" value="None"/>

Energy Calculation Files	
Compliance	[WORK WITH FILE]
Energy Star	[UPLOAD FILE]
CAHP	[UPLOAD FILE]
Photovoltaic (NSHP)	[WORK WITH FILE]

■ Getting Started

- 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 verify for NSHP documents.
- *A Builder must be indicated on your Project Home Page before proceeding.*
- Click **Actions**  located in the upper right hand corner of the page.
- Click **Solar Homes** 
- Select Version:
You can choose to work with the Flexible Installation verification process for sites utilizing the *NSHP Guidebook, Tenth Edition*, or with the previous verification process for projects subject to the *NSHP Guidebook, Ninth Edition* or earlier.

■ PV Calculator

- There will be several items to work with on the Solar Homes page. Not all steps will be applicable but you want to go through them in order.



Please select from the list below for what you want to do. Remember, Lots must already exist in the [Lots](#) section in order for you to work on them for Solar Homes.

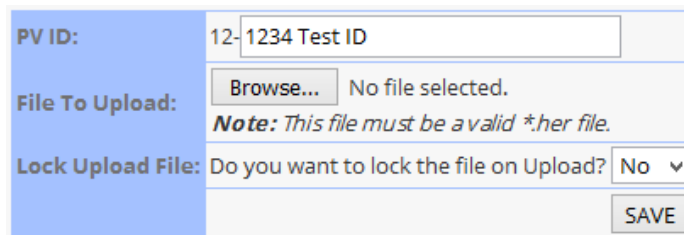
1. [Upload Calculation File \(NSHP-PV-1\) / Assign Address to PV](#) This starts the process. PV .HER file is uploaded here and units are assigned to PV.
2. [Assign Rater To Unit](#) This is where you would select which rater is to do the work.
3. [Submit NSHP-PV-2](#)
4. [Associate](#) (Group, Sample, etc)
5. [NSHP-PV-3 Checklist](#) This is what the rater would print to take as a checklist of what needs to be done.
6. [Register PDF of CF-3R Not in this project](#) If this unit has a CF-3R registered with a non-CalCERTS Registry or in a different project, upload the PDF file here.
7. [Register PDF of Additional Energy Features Not in this project](#) If this unit has Additional Energy Features registered with a non-CalCERTS Registry or in a different project, upload the PDF file here.
8. [Submit NSHP-PV-3 Results](#)

■ [NSHP Summary Page](#)

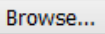
■ Uploading PV-1 Files and Assigning Raters


- Click on **Step 1. Upload Calculation File (NSHP-PV-1) / Assign Address to PV** to upload the .HER file.
- *Note: Any user has the availability to upload a .HER file. The .HER file is created by the CEC PV Calculator.*


- Select the **Upload New** icon  in order to create a new PV-1 file.
- Input the PV-1 ID. This ID is set by the user to refer to the project.
- Select the **Choose File/Browse** button to locate the .HER file from your computer.
- *OPTIONAL: Indicate if the file should be locked. Indicating the file as locked will prohibit anyone from replacing the file other than the individual who uploaded the file. Indicating the file as unlocked will allow anyone to replace the file if needed.*
- Click **SAVE** .




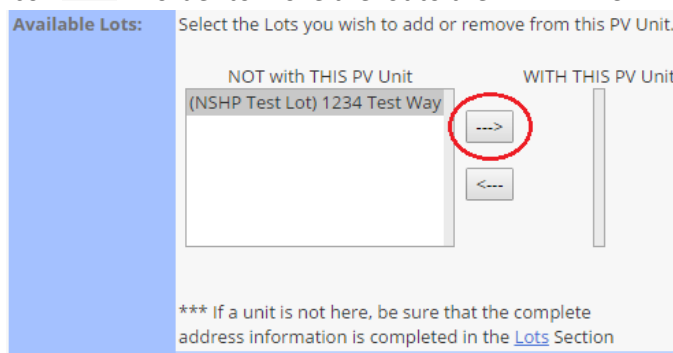
PV ID: 12-1234 Test ID

File To Upload:  No file selected.
*Note: This file must be a valid *.her file.*

Lock Upload File: Do you want to lock the file on Upload? No 



- The page will refresh. Next, in the **Available Lots** section, select which lot(s) should be attached to this PV-1 file by selecting the lot and clicking the **Shift** icon  in order to move the lot to the **WITH THIS PV Unit** section.




Available Lots: Select the Lots you wish to add or remove from this PV Unit.


NOT with THIS PV Unit
 (NSHP Test Lot) 1234 Test Way

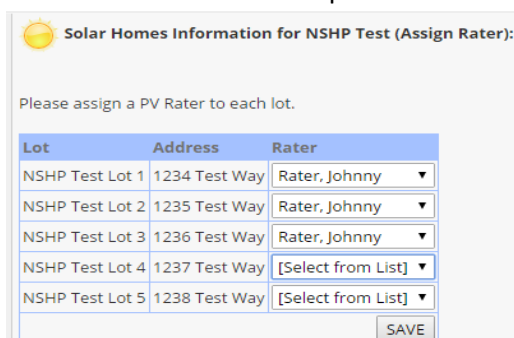
WITH THIS PV Unit


*** If a unit is not here, be sure that the complete address information is completed in the [Lots](#) Section

- Select the **Payment** icon  and follow through with the payment process.
- *Repeat the PV-1 upload steps for each .HER file that needs to be uploaded.*
- Once all of the .HER files have been uploaded, select the **Solar Homes** link to proceed to the next step.

[Project Home \(ID: 812098\)](#) / [Solar Homes](#) / [NSHP-PV-1](#) / [NSHP-PV-1 Detail](#)


- Next, select **Step 2. Assign Rater To Unit**. This is where a Rater is designated.
- Select a Rater from the dropdown list and Click **SAVE** .



 **Solar Homes Information for NSHP Test (Assign Rater):**

Please assign a PV Rater to each lot.


Lot	Address	Rater
NSHP Test Lot 1	1234 Test Way	Rater, Johnny
NSHP Test Lot 2	1235 Test Way	Rater, Johnny
NSHP Test Lot 3	1236 Test Way	Rater, Johnny
NSHP Test Lot 4	1237 Test Way	[Select from List]
NSHP Test Lot 5	1238 Test Way	[Select from List]

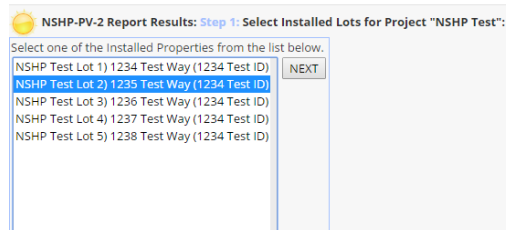


- Once this is done, click the **Solar Homes** link to proceed to the next step.


[Project Home \(ID: 812098\)](#) / [Solar Homes](#) / [NSHP-PV-1](#) / [NSHP-PV-1 Detail](#)

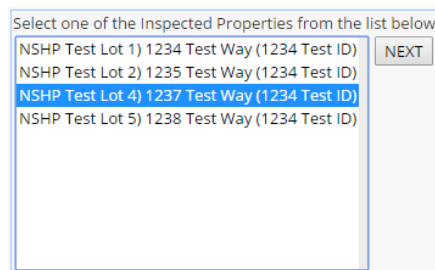
- Filling out the PV-2
 - *Note: The PV-2 is optional, but recommended. The Solar Rater or the Solar Installer can certify the PV-2.*
 - Click **Step 3. Submit NSHP-PV-2.**
 - Select the lot connected to the PV-2.

- Select **NEXT**  .
- [Solar Homes](#) / NSHP-PV-2




- Fill out the information on the form and select **Submit Results.**
- *Note: Once the PV-2s are filled out, you have the option of 100% testing or sampling for the PV-3s.*

- For 100% Testing
 - Go directly to **Step 8 Submit NSHP-PV-3 Results.**
 - Select the lot for the PV-3.
 - Click **NEXT**  .



- Fill out the information on the form and select **Submit Results.**
- *Note: Do this for each lot that has been tested.*
- For Sampling
 - *Note: A model test will NOT be necessary to complete before results can be entered for the group. No more than 15 systems may be assigned to a single group. However, a group may contain fewer should the group be “closed” prior to the assignment of the 15 systems. A sample group will be considered “open” once a system has been assigned to the group. A group will be automatically “closed” once six months has elapsed from the date the group was opened.*
 - Click on **Step 4. Associate.**
 - Select the lots that need to be grouped by checking the box next to the lot.


Lot Address	PVID	Group	Lot Address	PVID	Group	Lot Address
NSHP Test Lot 1 1234 Test Way	1234 Test ID	907007-19092 <input type="checkbox"/>	NSHP Test Lot 2 1235 Test Way	1234 Test ID	907007-19092 <input type="checkbox"/>	NSHP Test Lot 3 1236 Test Way
NSHP Test Lot 4 1237 Test Way	1234 Test ID	907007-19092 <input type="checkbox"/>	NSHP Test Lot 5 1238 Test Way	1234 Test ID	907007-19092 <input type="checkbox"/>	 Group

- Click Associate Checked Items, then confirm the group on the next page by clicking **Save Group**.


The following Lots will be associated as Group 907007.


Lot	Address	PVID
NSHP Test Lot 1	1234 Test Way - Carmichael, 95608	1234 Test ID
NSHP Test Lot 2	1235 Test Way - Carmichael, 95608	1234 Test ID
NSHP Test Lot 4	1237 Test Way - Carmichael, 95608	1234 Test ID



Save Group


- Once the group is created, click the **Solar Homes** link to proceed to the next step.
- Select the next step **Submit NSHP-PV-3 Results**.
- Click **NEXT** .

Select one of the Inspected Properties from the list below.

NSHP Test Lot 1) 1234 Test Way (1234 Test ID)	
NSHP Test Lot 2) 1235 Test Way (1234 Test ID)	
NSHP Test Lot 3) 1236 Test Way (1234 Test ID)	
NSHP Test Lot 4) 1237 Test Way (1234 Test ID)	
NSHP Test Lot 5) 1238 Test Way (1234 Test ID)	

NEXT 

- Click **Submit Results** once the information is filled out.
 - Note: You will be redirected to the NSHP Summary Page.*
 - Click **Needs NSHP-PV-3** on any of the lots in a group to begin reporting results for that group.
 - Select any of the lots in the group
 - Click **NEXT** .
 - Note: All lots in the group will then have their PV-3 submitted. You will be directed to the NSHP Summary Page.*
 - Click on the **Adobe PDF** icon  in order to download the Completion Certificate/PV-3 form.
 - Note: Only the tested lot in a group will have results recorded on the form. The certificates for all other lots in the group will not have results on the form but will indicate that it was part of a sample group and passed by association.*
- CF-3R EE Verified
 - Note: In order to submit the CF-3R EE Verified form, the lot must be attached to a CF1R with an XML file uploaded to the NSHP section. It is necessary to complete this step before a solar rebate can be received.*

Lot ID	Lot Name	Address	Plan
907007	NSHP Test Lot	1234 Test Way	

Plan (CF1R) for NSHP Test

Plan ID: 1267851
 CEC Registration #: 216-N0206976A-000000000-0000
 Plan Name: test plan
 Gas Utility: None
 Electric Utility: None

Energy Calculation Files

Compliance [WORK WITH FILE]
 Energy Star [UPLOAD FILE]
 CAHP [UPLOAD FILE]
 Photovoltaic (NSHP) [WORK WITH FILE]

Save Changes

- Note: Once this lot is attached to a PV-1 file, it will trigger the Additional Energy Features form located in the CF3R section of the project.

- Click **ProjectRoadmap** located at the top of the Project Home Page.

- Click **CF3R**

- Note: If there are multiple lots in the project, select the lot that needs the results reported.

- Click on **Report Results** to fill out the form. The **Additional Features** form will be located at the bottom of the list of CF3Rs.

Project Systems being reported:

Lot ID	Lot Name	Phase	Address	Plan	Sample Group
908314	NSHP Test Lot 6	Phase 1	1239 Test Way	test plan 2	

System ID	System	Tested Feature	Form Name	Tested Unit	CF2R Status	CF3R Status	Next Step
		QI-AIS-Batt, Loose Fill, and SPF	CF3R-ENV-21	1239 Test Way	REQUIRED	Not Started	Complete all CF2Rs first
		QI-Air Infiltration Sealing	CF3R-ENV-22	1239 Test Way	REQUIRED	Not Started	Complete all CF2Rs first
		QI-Installation	CF3R-ENV-23	1239 Test Way	REQUIRED	Not Started	Complete all CF2Rs first
1141482	System 1	Duct Leakage	CF3R-MCH-20	1239 Test Way	REQUIRED	Not Started	Complete all CF2Rs first
1141483	System 2	Duct Leakage	CF3R-MCH-20	1239 Test Way	REQUIRED	Not Started	Complete all CF2Rs first
1141482	System 1	Airflow	CF3R-MCH-23	1239 Test Way	REQUIRED	Not Started	Complete all CF2Rs first
1141483	System 2	Airflow	CF3R-MCH-23	1239 Test Way	REQUIRED	Not Started	Complete all CF2Rs first
1141482	System 1	Fan Efficacy	CF3R-MCH-22	1239 Test Way	REQUIRED	Not Started	Complete MCH23 First
1141483	System 2	Fan Efficacy	CF3R-MCH-22	1239 Test Way	REQUIRED	Not Started	Complete MCH23 First
1141482	System 1	Return Duct Design	CF3R-MCH-28	N/A	N/A	Not Started	Not Required
1141483	System 2	Return Duct Design	CF3R-MCH-28	N/A	N/A	Not Started	Not Required
1141482	System 1	Rated Equipment	CF3R-MCH-26	N/A	N/A	Not Started	Not Required
1141483	System 2	Rated Equipment	CF3R-MCH-26	1239 Test Way	N/A	Not Started	Complete all CF2Rs first
		IAQ and MLV	CF3R-MCH-27	1239 Test Way	REQUIRED	Not Started	Complete all CF2Rs first
		Additional Features	AdditionalEnergyFeatures	1239 Test Way		Not Started	Report Results

- Fill out the form, then select **Submit**.
- Click the **Payment** icon and follow through with the payment process.
- Go back to the CF3R page. Sign off on the form by
 - Clicking the **Check to Sign** box.
 - Click **Approve PDF** button located towards the bottom of the page.

*** ALERT *** - This the document contain

Approve PDF

- Go back to the **Solar Homes** section of the project.
- Click on the **NSHP Summary Page** link. The CF-3R EE Verified form will now be completed and can be downloaded by clicking on the **Adobe PDF** icon
- Note: The **NSHP Summary Page** is where you can view ALL NSHP documents on file for the project.

Solar Homes Information for NSHP Test:

ID	Lot Name	Rater	PVID	Address	City	State	Zip	NSHP-PV-2 Sampled	CF-3R EE Verified	Completion Certificate
907007-19092	NSHP Test Lot 1	Rater, Johnny	1234 Test ID	1234 Test Way	Carmichael	CA	95608			
907114-19092	NSHP Test Lot 2	Rater, Johnny	1234 Test ID	1235 Test Way	Carmichael	CA	95608			
907115-19092	NSHP Test Lot 3	Rater, Johnny	1234 Test ID	1236 Test Way	Carmichael	CA	95608			
907116-19092	NSHP Test Lot 4	Rater, Johnny	1234 Test ID	1237 Test Way	Carmichael	CA	95608			
907117-19092	NSHP Test Lot 5	Rater, Johnny	1234 Test ID	1238 Test Way	Carmichael	CA	95608			
908314-19092	NSHP Test Lot 6	Rater, Johnny	1234 Test ID	1239 Test Way	Carmichael	CA	95843			

- Additional NSHP Items
 - Step: NSHP-PV-3 Checklist
 - This document provides the Rater a checklist of what needs to be done. Print the document and use it as a checklist. Everything in the checklist is dependent on the PV-1. There may be multiple PV-3 forms for one address due to there being multiple PV-1 forms for each address.
 - Step: Register PDF of CF-3R Not in this project
 - If the unit has a CF-3R registered with a non-CalCERTS Registry or in a different project, upload the PDF file here.
 - Step: Register PDF of Additional Energy Features Not in this project
 - If the unit has Additional Energy Features registered with a non-CalCERTS Registry or in a different project, upload the PDF file here.

- FI Calculator (10th Edition)

- There will be several items to work with on the Solar Homes page. Not all steps will be applicable but you want to go through them in order.

Please select from the list below for what you want to do. Remember, Lots must already exist in the [Lots](#) section in order for you to work on them for Solar Homes.


1. [Upload Calculation File \(FI-1\) / Assign Address to PV](#) This starts the process. PV *.HUF file is uploaded here and units are assigned to PV.
2. [Assign Rater To Unit](#) This is where you would select which rater is to do the work.
3. [Submit FI-2](#)
4. [Associate](#) (Group, Sample, etc)
5. [Register PDF of Additional Energy Features NOT in this project \(OPTIONAL\)](#) If this unit has Additional Energy Features registered with a non-CalCERTS Registry or in a different project, upload the PDF file here.
6. [Submit FI-3 Results](#)

[NSHP Summary Page](#)


- Uploading FI-1 Files and Assigning Raters

- Click on **Step 1. Upload Calculation File (FI-1) / Assign Address to PV** to upload the .HUF file.
- *Note: Any user has the availability to upload a .HUF file.*
- Select the **Upload New** icon in order to create a new file.
- Input the PV-1 ID. This ID is set by the user to refer to the project.
- Select the **Choose File/Browse** button to locate the .HUF file from your computer.
- *OPTIONAL: Indicate if the file should be locked. Indicating the file as locked will prohibit anyone from replacing the file other than the individual who uploaded the file. Indicating the file as unlocked will allow anyone to replace the file if needed.*
- Click **SAVE**

PV ID:	12- 1234 Test ID
File To Upload:	<input type="button" value="Browse..."/> No file selected. <i>Note: This file must be a valid *.her file.</i>
Lock Upload File:	Do you want to lock the file on Upload? <input type="button" value="No"/> <input type="button" value="Yes"/>
<input type="button" value="SAVE"/>	

- The page will refresh. Next, in the **Available Lots** section, select which lot(s) should be attached to this file by selecting the lot and clicking the **Shift** icon  in order to move the lot to the **WITH THIS PV Unit** section.

Available Lots:	Select the Lots you wish to add or remove from this PV Unit.	
	NOT with THIS PV Unit (001) 001 <input type="button" value="--->"/>	WITH THIS PV Unit <input type="button" value="--->"/>
*** If a unit is not here, be sure that the complete address information is completed in the Lots Section AND Make sure that there is an NSHP Plan File uploaded for that unit.		

- Select the **Payment** icon  and follow through with the payment process.
- Repeat the FI upload steps for each .HUF file that needs to be uploaded.
- Once all of the .HUF files have been uploaded, select the **Solar Homes** link to proceed to the next step.

[Project Home \(ID: 812098\)](#) / [Solar Homes](#) / [NSHP-PV-1](#) / [NSHP-PV-1 Detail](#)

- Next, select **Step 2. Assign Rater To Unit**. This is where a Rater is designated.
- Select a Rater from the dropdown list and Click **SAVE** .

FI Calculator (10th Edition) Process

Please assign a PV Rater to each lot.


ID	Lot	PVID	Address	Rater
1015341-26961	001	20170510_Test1	001	<input type="text" value="Rater, Johnny"/>

- Once this is done, click the **Solar Homes** link to proceed to the next step.

[Project Home \(ID: 812098\)](#) / [Solar Homes](#) / [NSHP-PV-1](#) / [NSHP-PV-1 Detail](#)

■ Filling out the FI-2

- Note: The FI-2 is optional, but recommended. The Solar Rater or the Solar Installer can certify the FI-2.
- Click **Step 3. Submit FI-2**.
- Select the lot connected to the FI-2.
- Select **NEXT** .

 **FI-2 Report Results: Step 1: Select Installed Lots for Project "_SFR Acres - 2016":**

Select one of the Installed Properties from the list below.

- Fill out the information on the form and select **Submit Results**.
- *Note: Once the FI-2s are filled out, you have the option of 100% testing or sampling for the FI-3s.*

- For 100% Testing


- Go directly to **Submit FI-3 Results**.
- Select the lot for the FI-3.
- Click **NEXT** .

Select one of the Inspected Properties from the list below.

- Fill out the information on the form and select **Submit Results**.
- *Note: Do this for each lot that has been tested.*

- For Sampling

- *Note: A model test will NOT be necessary to complete before results can be entered for the group. No more than 15 systems may be assigned to a single group. However, a group may contain fewer should the group be “closed” prior to the assignment of the 15 systems. A sample group will be considered “open” once a system has been assigned to the group. A group will be automatically “closed” once six months has elapsed from the date the group was opened.*
- Click on **Associate**.

- Click the Sample icon  located to the right of the id you would like to work with.
- Click the default to in order to select the ID you would like to associate.

STEP 2: Select Systems in Group


ID	Label	PVID	Address	Rater	Sample Group	Sample Size	Days from Group Creation	Group Together
1015341-26961		20170510_Test1		Rater, Johnny				<input type="button" value="No"/>
1051800-26961		20170510_Test1		Rater, Johnny				YES

- Click **NEXT**



STEP 3: FINAL Confirmation
The following will be put in a group together

ID	Label	PVID	Address	Rater	Sample Group	Sample Size	Days from Group Creation	Group Together
1015341-26961		20170510_Test1		Rater, Johnny				YES
1051800-26961		20170510_Test1		Rater, Johnny				YES

Save


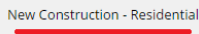



- Click **SAVE** .
- Click ok to confirm your group has been saved.
- Once the group is created, click the **Solar Homes** link to proceed to the next step.

[Project Home \(ID: 862262\)](#) / [Solar Homes](#) / Association

- Select the next step **Submit FI-3 Results**.
- Select the lot.
- Click **NEXT** .
- Click **Submit Results** once the information is filled out.
- Note: All lots in the group will then have their FI-3 submitted. You will be directed to the NSHP Summary Page.*
- Click on the **Adobe PDF** icon  in order to download the Completion Certificate FI-3 form.
- Note: Only the tested lot in a group will have results recorded on the form. The certificates for all other lots in the group will not have results on the form but will indicate that it was part of a sample group and passed by association.*

Energy Star 3.0

Energy Star 3.0 only applies to New Construction Residential Projects in www.calcerts.com

- 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 3.0 documents to.
- Click **Actions**  located in the upper right hand corner of the page.
- Click **Energy Star 3.0** .
- Click step 1. **Verify Lot qualifies for Energy Star 3.0** in order to assign the bedroom count to each lot.
- Click the **Provide Bedroom Count** [\[Provide Bedroom Count\]](#) link for each lot.
- Input the bedroom count, check the box and Click **Save**.

126 Test Way Bedroom Count Verification:

Number of Bedrooms:

☐ By checking this box, I (Bryan Villagomez) v

SAVE


- *Note: If the wrong number was input, it can be changed by clicking the number under the Bedrooms section. Re-enter the bedroom count and Click Save.*

- Click the **Report Results** icon .

- *Note: You can also begin submitting results by clicking the link for step 2 on the Energy Star Homepage, **Certify Energy Star 3.0**.*

1. [Verify Lot](#) qualifies for Energy Star 3.0.

➔ 2. [Certify Energy Star 3.0](#) This is where you process your Energy Star 3.0 Certification.

- Choose which revision you are submitting under.
- 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.

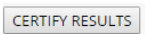




Must Correct	Builder Verified ¹	Rater Verified	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. High-Performance Fenestration
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	1.1 Prescriptive Path: Fenestration shall meet or exceed ENERGY STAR requirements ²
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	1.2 Performance Path: Fenestration shall meet or exceed 2009 IECC requirements ²









- Some items will also have text boxes used for data entry.


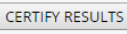

4.3 Condenser manufacturer & model:	<input type="text"/>
4.4 Evaporator / fan coil manufacturer & model:	<input type="text"/>
4.5 AHRI reference #: ²¹	<input type="text"/>



- Select the appropriate Rater and Builder names from the drop down menus near the bottom of the forms.

Pre-Drywall Rater: <input type="text" value="--- Select from list ---"/>	Date: <input type="text" value=""/>	(M/D/YYYY)
Final Inspection Rater: <input type="text" value="--- Select from list ---"/>	Date: <input type="text" value=""/>	(M/D/YYYY)
Builder Employee: <input type="text" value="--- Select from list ---"/>	Inspection Date: <input type="text" value=""/>	(M/D/YYYY)
Responsible Rater's Name <input type="text" value="Rater, Johnny"/>		
Responsible HERS Company Name: <input type="text" value="---SELECT HERS COMPANY---"/>		

- Select whether or not it passed or failed. **FINAL TESTED RESULT:** ☒ Pass ☐ Fail
- Click **CERTIFY RESULTS**  to submit the form.
- Repeat steps 14-19 for each form under the chosen revision.
- 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.*



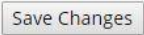

Forms Required for Revision 3.05	Inspected Lot	Status	Start	001 123 Test Way
Rater Field Checklist (Rev. 08)	123 Test Way (001)	Complete		
HVAC Commissioning Checklist (Rev. 08)	123 Test Way (001)	Complete		
HVAC Design Report (Rev. 08)	123 Test Way (001)	Complete		
Rater Design Review Checklist (Rev. 08)	123 Test Way (001)	Complete		

- *Note: Once ALL forms under the chosen revision are submitted the Energy Star Certificate will become available for submission.*
- Click **NEXT**  under Energy Star Certificate for Revision 3.00 and above for Energy Star Certified New Home.
- As with the previous forms, fill out the information and click **CERTIFY RESULTS**  to submit.
- Click on the **PDF** Icon  for Energy Star Certificate in order to download.

Energy Star Certificate for Revision 3.00 and above	Inspected Lot	Status	Start	001 123 Test Way
Energy Star Certified New Home *** ALERT *** This form needs to be completed in order to receive full EnergyStar Credit.	123 Test Way (001)	Complete		

Completing Projects

Signature Notification

- CF1Rs
 - Within the CF1R Registration Bin
 - Click **CF-1R Registration**  **CF-1R Registration** ▼
 - Select the year code for the bin you would like to access. This feature only applies to the 2013 or 2016 code.
 - Open the CF1R you would like to work with 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.



The screenshot shows a web interface with tabs: Energy Calculation Files, Tests, System Names, Sign Off, and Lots. The 'Sign Off' tab is active. Below the tabs, there are two sections with yellow backgrounds and red alerts. The first section is 'DOCUMENTATION AUTHOR - Alert: Needs Signature' and the second is 'RESPONSIBLE DESIGNER - Alert: Needs Signature'. Each section has input fields for Name, Company Name, and License, with dropdown menus for the first two. A 'Save Changes' button is at the bottom of the first section.

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	
Responsible Designer Name:	Builder, Johnny ▼
Responsible Designer Company Name:	Builder One ▼
Designer's License:	NA Required before PDF can be signed.

Save Changes

-
- 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.





This screenshot is similar to the previous one, but the 'RESPONSIBLE DESIGNER' section now includes a confirmation message: 'Johnny Rater has already made a request for a signature.' The 'Save Changes' button is still present at the bottom of the first section.

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.

Save Changes

Within a Project

- Open the New Construction Residential project you would like to work with.
- Click **Actions**  located in the upper right.
- Click **E-Mail Notifications** .
- 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

- Click the drop down for instructions for further details (Optional.)
- Click **Save Changes**
- Repeat the steps if you would like to receive notifications for both options.



- Click **ProjectRoadmap**



- Click **CF1R**



- Open the CF1R you would like to work with by clicking .
- Select the Documentation Author, Responsible Designer & Designer's License.

Save Changes

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



- Click to email the Responsible Person.


- 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.

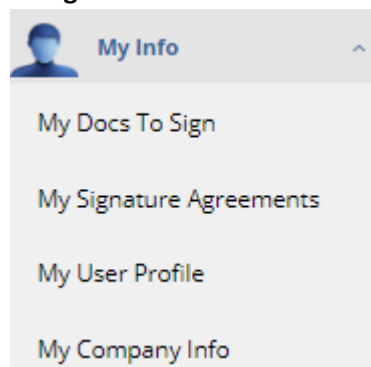
Signing Documents

- 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.






- To sign a single form select the form type from the **Project Roadmap**

 ProjectRoadmap ▼ such as **CF1R**  or **CF2R**  or **CF3R**  then select the **Check to Sign** ☐ Check to Sign .

- Next select the **PDF** icon  to review the unofficial document before approval.
- Next select **Approve PDF** .
- 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 forms from the ProjectRoadmap 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 Reports

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.

Project Status Report CalCERTS, Inc. 1 of 2

GENERAL INFORMATION

Code Year: 2013
 Project Name: New Construction
 Project Type: New Construction
 Address: 12345 Main St
 City / State / Zip: San Jose / CA / 95131
 Enforcement Agency: City of San Jose
 Permit Number: 12345
 Agency Email: info@calcerts.com

QR CODE

HERS MEASURES

System	Form	Registered Date	Registration Number	Status
System 1	Q 240-100-01	6/22/2016	22-HERS-01-000001-0001	Complete
System 1	Q 240-100-02	6/22/2016	22-HERS-01-000002-0001	Complete
System 1	Q 240-100-03	6/22/2016	22-HERS-01-000003-0001	Complete
System 1	Q 240-100-04	6/22/2016	22-HERS-01-000004-0001	Complete
System 1	Q 240-100-05	6/22/2016	22-HERS-01-000005-0001	Complete
System 1	Q 240-100-06	6/22/2016	22-HERS-01-000006-0001	Complete
System 1	Q 240-100-07	6/22/2016	22-HERS-01-000007-0001	Complete
System 1	Q 240-100-08	6/22/2016	22-HERS-01-000008-0001	Complete
System 1	Q 240-100-09	6/22/2016	22-HERS-01-000009-0001	Complete
System 1	Q 240-100-10	6/22/2016	22-HERS-01-000010-0001	Complete
System 1	Q 240-100-11	6/22/2016	22-HERS-01-000011-0001	Complete
System 1	Q 240-100-12	6/22/2016	22-HERS-01-000012-0001	Complete
System 1	Q 240-100-13	6/22/2016	22-HERS-01-000013-0001	Complete
System 1	Q 240-100-14	6/22/2016	22-HERS-01-000014-0001	Complete
System 1	Q 240-100-15	6/22/2016	22-HERS-01-000015-0001	Complete
System 1	Q 240-100-16	6/22/2016	22-HERS-01-000016-0001	Complete
System 1	Q 240-100-17	6/22/2016	22-HERS-01-000017-0001	Complete
System 1	Q 240-100-18	6/22/2016	22-HERS-01-000018-0001	Complete
System 1	Q 240-100-19	6/22/2016	22-HERS-01-000019-0001	Complete
System 1	Q 240-100-20	6/22/2016	22-HERS-01-000020-0001	Complete
System 1	Q 240-100-21	6/22/2016	22-HERS-01-000021-0001	Complete
System 1	Q 240-100-22	6/22/2016	22-HERS-01-000022-0001	Complete
System 1	Q 240-100-23	6/22/2016	22-HERS-01-000023-0001	Complete
System 1	Q 240-100-24	6/22/2016	22-HERS-01-000024-0001	Complete
System 1	Q 240-100-25	6/22/2016	22-HERS-01-000025-0001	Complete
System 1	Q 240-100-26	6/22/2016	22-HERS-01-000026-0001	Complete
System 1	Q 240-100-27	6/22/2016	22-HERS-01-000027-0001	Complete
System 1	Q 240-100-28	6/22/2016	22-HERS-01-000028-0001	Complete
System 1	Q 240-100-29	6/22/2016	22-HERS-01-000029-0001	Complete
System 1	Q 240-100-30	6/22/2016	22-HERS-01-000030-0001	Complete
System 1	Q 240-100-31	6/22/2016	22-HERS-01-000031-0001	Complete
System 1	Q 240-100-32	6/22/2016	22-HERS-01-000032-0001	Complete
System 1	Q 240-100-33	6/22/2016	22-HERS-01-000033-0001	Complete
System 1	Q 240-100-34	6/22/2016	22-HERS-01-000034-0001	Complete
System 1	Q 240-100-35	6/22/2016	22-HERS-01-000035-0001	Complete
System 1	Q 240-100-36	6/22/2016	22-HERS-01-000036-0001	Complete
System 1	Q 240-100-37	6/22/2016	22-HERS-01-000037-0001	Complete
System 1	Q 240-100-38	6/22/2016	22-HERS-01-000038-0001	Complete
System 1	Q 240-100-39	6/22/2016	22-HERS-01-000039-0001	Complete
System 1	Q 240-100-40	6/22/2016	22-HERS-01-000040-0001	Complete
System 1	Q 240-100-41	6/22/2016	22-HERS-01-000041-0001	Complete
System 1	Q 240-100-42	6/22/2016	22-HERS-01-000042-0001	Complete
System 1	Q 240-100-43	6/22/2016	22-HERS-01-000043-0001	Complete
System 1	Q 240-100-44	6/22/2016	22-HERS-01-000044-0001	Complete
System 1	Q 240-100-45	6/22/2016	22-HERS-01-000045-0001	Complete
System 1	Q 240-100-46	6/22/2016	22-HERS-01-000046-0001	Complete
System 1	Q 240-100-47	6/22/2016	22-HERS-01-000047-0001	Complete
System 1	Q 240-100-48	6/22/2016	22-HERS-01-000048-0001	Complete
System 1	Q 240-100-49	6/22/2016	22-HERS-01-000049-0001	Complete
System 1	Q 240-100-50	6/22/2016	22-HERS-01-000050-0001	Complete
System 1	Q 240-100-51	6/22/2016	22-HERS-01-000051-0001	Complete
System 1	Q 240-100-52	6/22/2016	22-HERS-01-000052-0001	Complete
System 1	Q 240-100-53	6/22/2016	22-HERS-01-000053-0001	Complete
System 1	Q 240-100-54	6/22/2016	22-HERS-01-000054-0001	Complete
System 1	Q 240-100-55	6/22/2016	22-HERS-01-000055-0001	Complete
System 1	Q 240-100-56	6/22/2016	22-HERS-01-000056-0001	Complete
System 1	Q 240-100-57	6/22/2016	22-HERS-01-000057-0001	Complete
System 1	Q 240-100-58	6/22/2016	22-HERS-01-000058-0001	Complete
System 1	Q 240-100-59	6/22/2016	22-HERS-01-000059-0001	Complete
System 1	Q 240-100-60	6/22/2016	22-HERS-01-000060-0001	Complete
System 1	Q 240-100-61	6/22/2016	22-HERS-01-000061-0001	Complete
System 1	Q 240-100-62	6/22/2016	22-HERS-01-000062-0001	Complete
System 1	Q 240-100-63	6/22/2016	22-HERS-01-000063-0001	Complete
System 1	Q 240-100-64	6/22/2016	22-HERS-01-000064-0001	Complete
System 1	Q 240-100-65	6/22/2016	22-HERS-01-000065-0001	Complete
System 1	Q 240-100-66	6/22/2016	22-HERS-01-000066-0001	Complete
System 1	Q 240-100-67	6/22/2016	22-HERS-01-000067-0001	Complete
System 1	Q 240-100-68	6/22/2016	22-HERS-01-000068-0001	Complete
System 1	Q 240-100-69	6/22/2016	22-HERS-01-000069-0001	Complete
System 1	Q 240-100-70	6/22/2016	22-HERS-01-000070-0001	Complete
System 1	Q 240-100-71	6/22/2016	22-HERS-01-000071-0001	Complete
System 1	Q 240-100-72	6/22/2016	22-HERS-01-000072-0001	Complete
System 1	Q 240-100-73	6/22/2016	22-HERS-01-000073-0001	Complete
System 1	Q 240-100-74	6/22/2016	22-HERS-01-000074-0001	Complete
System 1	Q 240-100-75	6/22/2016	22-HERS-01-000075-0001	Complete
System 1	Q 240-100-76	6/22/2016	22-HERS-01-000076-0001	Complete
System 1	Q 240-100-77	6/22/2016	22-HERS-01-000077-0001	Complete
System 1	Q 240-100-78	6/22/2016	22-HERS-01-000078-0001	Complete
System 1	Q 240-100-79	6/22/2016	22-HERS-01-000079-0001	Complete
System 1	Q 240-100-80	6/22/2016	22-HERS-01-000080-0001	Complete
System 1	Q 240-100-81	6/22/2016	22-HERS-01-000081-0001	Complete
System 1	Q 240-100-82	6/22/2016	22-HERS-01-000082-0001	Complete
System 1	Q 240-100-83	6/22/2016	22-HERS-01-000083-0001	Complete
System 1	Q 240-100-84	6/22/2016	22-HERS-01-000084-0001	Complete
System 1	Q 240-100-85	6/22/2016	22-HERS-01-000085-0001	Complete
System 1	Q 240-100-86	6/22/2016	22-HERS-01-000086-0001	Complete
System 1	Q 240-100-87	6/22/2016	22-HERS-01-000087-0001	Complete
System 1	Q 240-100-88	6/22/2016	22-HERS-01-000088-0001	Complete
System 1	Q 240-100-89	6/22/2016	22-HERS-01-000089-0001	Complete
System 1	Q 240-100-90	6/22/2016	22-HERS-01-000090-0001	Complete
System 1	Q 240-100-91	6/22/2016	22-HERS-01-000091-0001	Complete
System 1	Q 240-100-92	6/22/2016	22-HERS-01-000092-0001	Complete
System 1	Q 240-100-93	6/22/2016	22-HERS-01-000093-0001	Complete
System 1	Q 240-100-94	6/22/2016	22-HERS-01-000094-0001	Complete
System 1	Q 240-100-95	6/22/2016	22-HERS-01-000095-0001	Complete
System 1	Q 240-100-96	6/22/2016	22-HERS-01-000096-0001	Complete
System 1	Q 240-100-97	6/22/2016	22-HERS-01-000097-0001	Complete
System 1	Q 240-100-98	6/22/2016	22-HERS-01-000098-0001	Complete
System 1	Q 240-100-99	6/22/2016	22-HERS-01-000099-0001	Complete
System 1	Q 240-100-100	6/22/2016	22-HERS-01-000100-0001	Complete

HERS MEASURES

HERS MEASURE 1: 22-HERS-01-000001-0001 (Complete)

HERS MEASURE 2: 22-HERS-01-000002-0001 (Complete)

HERS MEASURE 3: 22-HERS-01-000003-0001 (Complete)

HERS MEASURE 4: 22-HERS-01-000004-0001 (Complete)

HERS MEASURE 5: 22-HERS-01-000005-0001 (Complete)

HERS MEASURE 6: 22-HERS-01-000006-0001 (Complete)

HERS MEASURE 7: 22-HERS-01-000007-0001 (Complete)

HERS MEASURE 8: 22-HERS-01-000008-0001 (Complete)

HERS MEASURE 9: 22-HERS-01-000009-0001 (Complete)

HERS MEASURE 10: 22-HERS-01-000010-0001 (Complete)

HERS MEASURE 11: 22-HERS-01-000011-0001 (Complete)

HERS MEASURE 12: 22-HERS-01-000012-0001 (Complete)

HERS MEASURE 13: 22-HERS-01-000013-0001 (Complete)

HERS MEASURE 14: 22-HERS-01-000014-0001 (Complete)

HERS MEASURE 15: 22-HERS-01-000015-0001 (Complete)

HERS MEASURE 16: 22-HERS-01-000016-0001 (Complete)

HERS MEASURE 17: 22-HERS-01-000017-0001 (Complete)

HERS MEASURE 18: 22-HERS-01-000018-0001 (Complete)

HERS MEASURE 19: 22-HERS-01-000019-0001 (Complete)

HERS MEASURE 20: 22-HERS-01-000020-0001 (Complete)

HERS MEASURE 21: 22-HERS-01-000021-0001 (Complete)

HERS MEASURE 22: 22-HERS-01-000022-0001 (Complete)

HERS MEASURE 23: 22-HERS-01-000023-0001 (Complete)

HERS MEASURE 24: 22-HERS-01-000024-0001 (Complete)

HERS MEASURE 25: 22-HERS-01-000025-0001 (Complete)

HERS MEASURE 26: 22-HERS-01-000026-0001 (Complete)

HERS MEASURE 27: 22-HERS-01-000027-0001 (Complete)

HERS MEASURE 28: 22-HERS-01-000028-0001 (Complete)

HERS MEASURE 29: 22-HERS-01-000029-0001 (Complete)

HERS MEASURE 30: 22-HERS-01-000030-0001 (Complete)

HERS MEASURE 31: 22-HERS-01-000031-0001 (Complete)

HERS MEASURE 32: 22-HERS-01-000032-0001 (Complete)

HERS MEASURE 33: 22-HERS-01-000033-0001 (Complete)

HERS MEASURE 34: 22-HERS-01-000034-0001 (Complete)

HERS MEASURE 35: 22-HERS-01-000035-0001 (Complete)

HERS MEASURE 36: 22-HERS-01-000036-0001 (Complete)

HERS MEASURE 37: 22-HERS-01-000037-0001 (Complete)

HERS MEASURE 38: 22-HERS-01-000038-0001 (Complete)

HERS MEASURE 39: 22-HERS-01-000039-0001 (Complete)

HERS MEASURE 40: 22-HERS-01-000040-0001 (Complete)

HERS MEASURE 41: 22-HERS-01-000041-0001 (Complete)

HERS MEASURE 42: 22-HERS-01-000042-0001 (Complete)

HERS MEASURE 43: 22-HERS-01-000043-0001 (Complete)

HERS MEASURE 44: 22-HERS-01-000044-0001 (Complete)

HERS MEASURE 45: 22-HERS-01-000045-0001 (Complete)

HERS MEASURE 46: 22-HERS-01-000046-0001 (Complete)

HERS MEASURE 47: 22-HERS-01-000047-0001 (Complete)

HERS MEASURE 48: 22-HERS-01-000048-0001 (Complete)

HERS MEASURE 49: 22-HERS-01-000049-0001 (Complete)

HERS MEASURE 50: 22-HERS-01-000050-0001 (Complete)

HERS MEASURE 51: 22-HERS-01-000051-0001 (Complete)

HERS MEASURE 52: 22-HERS-01-000052-0001 (Complete)

HERS MEASURE 53: 22-HERS-01-000053-0001 (Complete)

HERS MEASURE 54: 22-HERS-01-000054-0001 (Complete)

HERS MEASURE 55: 22-HERS-01-000055-0001 (Complete)

HERS MEASURE 56: 22-HERS-01-000056-0001 (Complete)

HERS MEASURE 57: 22-HERS-01-000057-0001 (Complete)

HERS MEASURE 58: 22-HERS-01-000058-0001 (Complete)

HERS MEASURE 59: 22-HERS-01-000059-0001 (Complete)

HERS MEASURE 60: 22-HERS-01-000060-0001 (Complete)

HERS MEASURE 61: 22-HERS-01-000061-0001 (Complete)

HERS MEASURE 62: 22-HERS-01-000062-0001 (Complete)

HERS MEASURE 63: 22-HERS-01-000063-0001 (Complete)

HERS MEASURE 64: 22-HERS-01-000064-0001 (Complete)

HERS MEASURE 65: 22-HERS-01-000065-0001 (Complete)

HERS MEASURE 66: 22-HERS-01-000066-0001 (Complete)

HERS MEASURE 67: 22-HERS-01-000067-0001 (Complete)

HERS MEASURE 68: 22-HERS-01-000068-0001 (Complete)

HERS MEASURE 69: 22-HERS-01-000069-0001 (Complete)

HERS MEASURE 70: 22-HERS-01-000070-0001 (Complete)

HERS MEASURE 71: 22-HERS-01-000071-0001 (Complete)

HERS MEASURE 72: 22-HERS-01-000072-0001 (Complete)

HERS MEASURE 73: 22-HERS-01-000073-0001 (Complete)

HERS MEASURE 74: 22-HERS-01-000074-0001 (Complete)

HERS MEASURE 75: 22-HERS-01-000075-0001 (Complete)

HERS MEASURE 76: 22-HERS-01-000076-0001 (Complete)

HERS MEASURE 77: 22-HERS-01-000077-0001 (Complete)

HERS MEASURE 78: 22-HERS-01-000078-0001 (Complete)

HERS MEASURE 79: 22-HERS-01-000079-0001 (Complete)

HERS MEASURE 80: 22-HERS-01-000080-0001 (Complete)

HERS MEASURE 81: 22-HERS-01-000081-0001 (Complete)

HERS MEASURE 82: 22-HERS-01-000082-0001 (Complete)

HERS MEASURE 83: 22-HERS-01-000083-0001 (Complete)

HERS MEASURE 84: 22-HERS-01-000084-0001 (Complete)

HERS MEASURE 85: 22-HERS-01-000085-0001 (Complete)

HERS MEASURE 86: 22-HERS-01-000086-0001 (Complete)

HERS MEASURE 87: 22-HERS-01-000087-0001 (Complete)

HERS MEASURE 88: 22-HERS-01-000088-0001 (Complete)

HERS MEASURE 89: 22-HERS-01-000089-0001 (Complete)

HERS MEASURE 90: 22-HERS-01-000090-0001 (Complete)


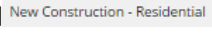




HERS MEASURE 91: 22-HERS-01-000091-0001 (Complete)

HERS MEASURE 92: 22-HERS-01-000092-0001 (Complete)

HERS MEASURE 93: 22-HERS-01-000093-0001 (Complete)

HERS MEASURE 94: 22-HERS-01-

- 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 **Work with Project** icon  located to the right of the selected project.
 - Click **ProjectRoadmap**  located at the top of the Project Home Page.
 - 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**:

Project Home (ID: 515566) / CF2R

Please select the CF2Rs to complete below.

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF2R 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	Unmet	Document	Document Status	Documentation Author	Responsible Person
		Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01-H	Not Started	Request Results					
		Penetration Installation	CF2R-ENVI-01	Not Started	Request Results					
		Envelope Air Sealing	CF2R-ENVI-02	Not Started	Request Results					
		Insulation Installation	CF2R-ENVI-03	Not Started	Request Results					
		Roofing Radiant Barrier	CF2R-ENVI-04	Not Started	Request Results					
772496	System 1	Duct Leakage	CF2R-MCH-20	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Airflow	CF2R-MCH-23	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Fan Efficiency	CF2R-MCH-22	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Return Duct Design	CF2R-MCH-28	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Refrigerant Charge	CF2R-MCH-25	Complete MCH01 first	Complete MCH01 first					
		HV and MV	CF2R-MCH-27	Complete MCH01 first	Complete MCH01 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.

Sample Group Status Report

Summary of CF2R Status

HERS Provider: CalCERTS, Inc.

Project Name: 4231 Greenbush Ave.

Project ID: 515566

Sample Group Type: T24

Sample Group Name: T24

System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Unmet	Document	Document Status	Documentation Author	Responsible Person
772496	System 1	Duct Leakage	CF2R-MCH-20	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Airflow	CF2R-MCH-23	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Fan Efficiency	CF2R-MCH-22	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Return Duct Design	CF2R-MCH-28	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Refrigerant Charge	CF2R-MCH-25	Complete MCH01 first	Complete MCH01 first					
		HV and MV	CF2R-MCH-27	Complete MCH01 first	Complete MCH01 first					

Sample Group Status Report

Summary of CF2R Status

HERS Provider: CalCERTS, Inc.

Project Name: 4231 Greenbush Ave.

Project ID: 515566

Sample Group Type: T24

Sample Group Name: T24

System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Unmet	Document	Document Status	Documentation Author	Responsible Person
772496	System 1	Duct Leakage	CF2R-MCH-20	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Airflow	CF2R-MCH-23	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Fan Efficiency	CF2R-MCH-22	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Return Duct Design	CF2R-MCH-28	Complete MCH01 first	Complete MCH01 first					
772496	System 1	Refrigerant Charge	CF2R-MCH-25	Complete MCH01 first	Complete MCH01 first					
		HV and MV	CF2R-MCH-27	Complete MCH01 first	Complete MCH01 first					


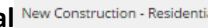




Green = Complete



Red = Incomplete


- To access the SSR:

- Log into www.calcerts.com
- Click **Projects**  located on the left side menu bar.
- Click **New Construction - Residential** .
- Click the **Work with Project** icon  located to the right of the selected project.
- Click **ProjectRoadmap**  located at the top of the Project Home Page.



- Click the **CF2R** Link .
- Click the Sample Number (Example 216-00110-T) located in the Group column.

Group
216-02784-O-T
216-02037-O
216-01553-O

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

▪ Quick Status Report (QSR)

- The Quick Status Report (QSR) was created in response to our Registry users who want to quickly check the overall status of new construction projects. The QSR provides a snapshot of the project and summarizes which forms and/or measures are still needed to ensure compliance. Viewing the QSR does not require verification of all compliance data and as a result the QSR can be generated quickly. The QSR is easily shared with anyone associated with the project and can facilitate project completion. The QSR is available on the CF2R 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 **Work with Project** icon  located to the right of the selected project.
 - Click **ProjectRoadmap**  located at the top of the Project Home Page.
 - 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 (Fenestration 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 - Tech@calcerts.com

The *CalCERTS Technical Support Team* is available by phone and email to help with Registry related questions. Registry users may contact Tech Support by emailing Tech@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. In order to create a login for the Helpdesk, users only need to provide an email address.

Compliance Questions – Field@calcerts.com

The *CalCERTS Field Support Team* is available by phone and email to help with questions related to California's Building Energy Efficiency Standards. Common questions received by our Field Team include questions related to Home Energy Rating System (HERS) requirements and compliance form registration. To reach the Field Team email Field@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) 985-3400 ext. 2009.

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.