CalCERTS Registry User Manual

2022 ENERGY CODE

Version: January 1, 2023

CalCERTS
HERS PROVIDER

Contents

Introduction 1
Registry Overview 2
User Registration 2
Importance of Unique Registry Login 5
Key Terms 6
Feature Updates 7
Compliance Forms 11
Setting Signature 12
Signature Agreements 14
My Industry Partners 18
Making Corrections 19
Recover or Reset Password 20
Getting Started 21
Sample Projects 28
Residential Alterations Fast-Track 28
Residential Alterations 34
Existing Buildings with Additions/Alterations 42
Residential New Construction 50
Non-Residential Alterations 59
Non-Residential New Construction 63
Multi-Family Project 68
Energy Home Ratings 76
Completing Projects 83
CF1R Signature Notifications 83
Signing Documents 85
Payment 87
Status Reports 88
CalCERTS Support Services 93

Introduction

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

The CalCERTS Registry has been tested and approved by the California Energy Commission to register compliance documents for California's Building Energy Efficiency Standards for the 2005, 2008, 2013, 2016, 2019 and 2022 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.

Copyright: ©2022 All Rights Reserved

This manual is the copyrighted intellectual property of CalCERTS, Inc. It may not be copied in whole or in part without express written consent from CalCERTS, Inc. It is intended for the sole use of CalCERTS, Inc. certified Raters and is the approved training manual for navigating the CalCERTS Registry.

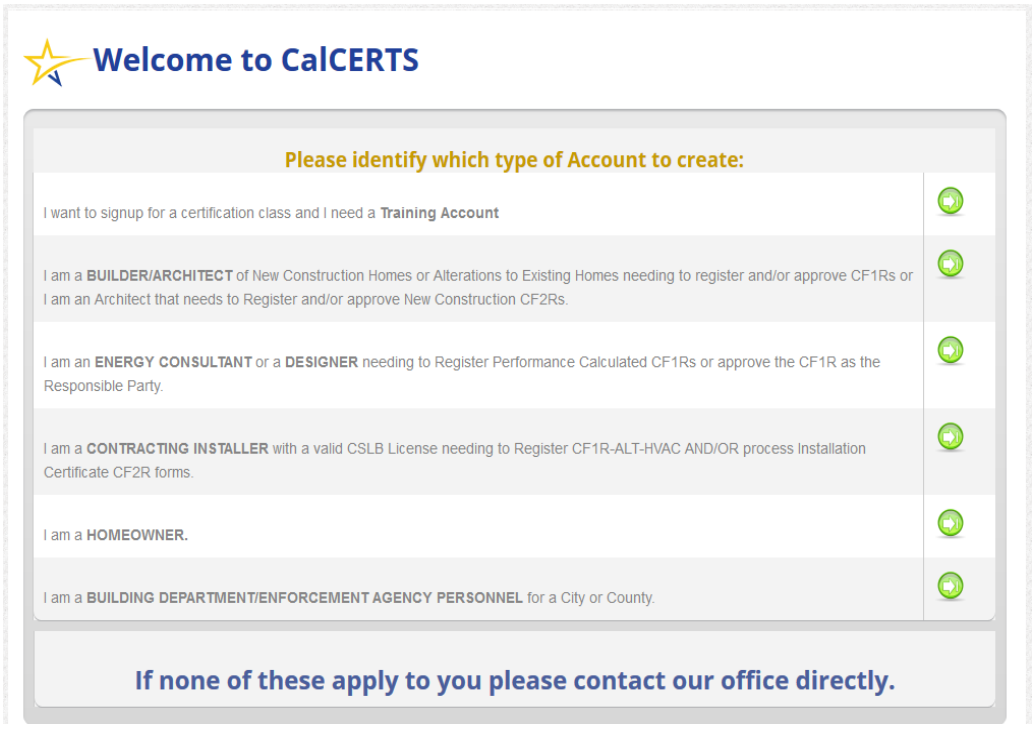
The content including text, graphics, and images is protected by copyright under United States law. It is unlawful to modify, reproduce, publicly perform, or distribute the material for the purpose of financial gain. CalCERTS, Inc. is not liable to any party for any direct, indirect, incidental, punitive, or consequential damages (including without limitation business losses; loss of revenue, income, profits or anticipated savings; loss of contracts or business relationships; or loss of reputation or goodwill) as a result of the use, application, or adaptation of materials included herein.

Registry Overview

User Registration

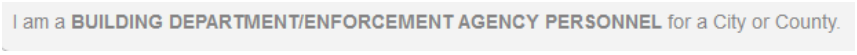
- To create an account as a user within the CalCERTS registry go to www.calcerts.com and select **Create An Account**

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

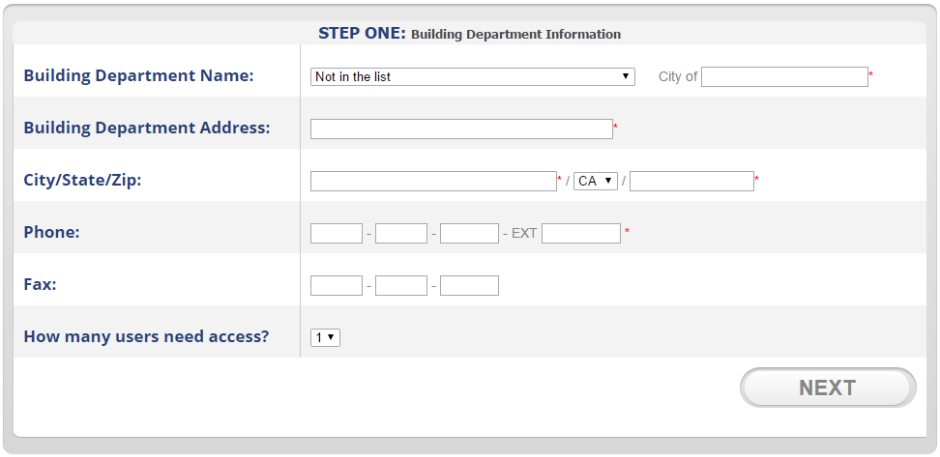


- **HERS Raters**
    - HERS Raters may self-register by selecting the link and inputting their contact information. They are linked to a training account while going through the training and verification process.
- **Builder/Architect**
    - Builder/Architects must register with CalCERTS to sign Certificates 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 for verification. Once the account has been verified, the Homeowner will be emailed a link to set their password and access the CalCERTS Registry.
- **Building Departments**
    - Building Departments must register with CalCERTS to view the Project Status Report and registered CF1Rs for their jurisdiction.
    - Building Departments may self-register by selecting the link and inputting their company information through the three-step process. Once CalCERTS verifies the information submitted, the Building Department will be emailed a link to set the password and access the CalCERTS Registry.

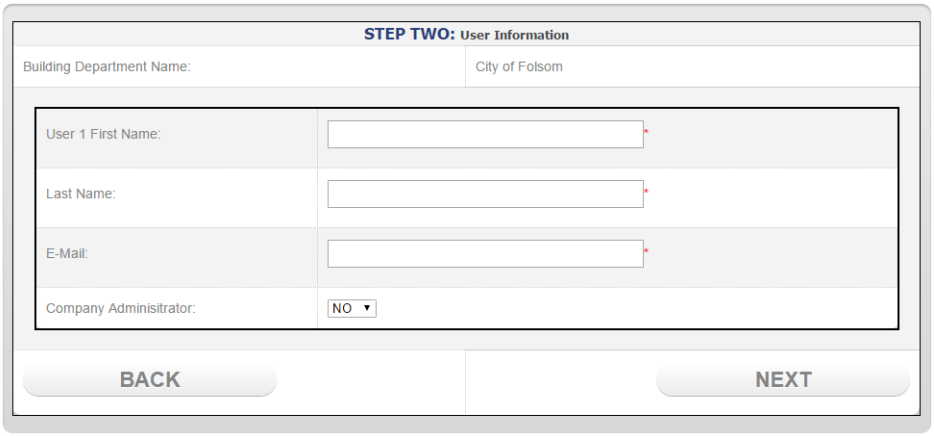
- **Building Department Self-Registration Process**
  - Visit www.calcerts.com
  - Click **Create An Account**

located in the upper right of our home page.
  - Click the **Register** icon located to the right of


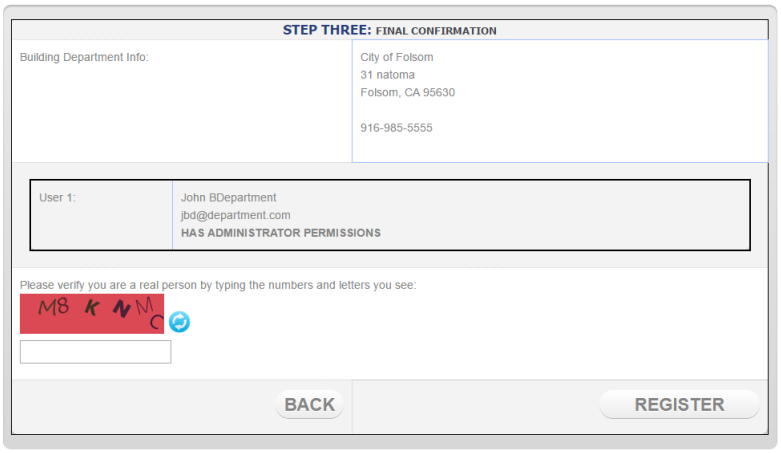
  - Click **No** if you have not had a CalCERTS account before.
  - Input the required information for Step ONE and Click **NEXT**:



  - ***Note**: You can register as many users as 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 support@calcerts.com.

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

Key Terms

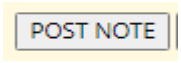
- **Authorized Representative**: A representative designated by a Responsible Person that agrees to sign and register certificates on behalf of the Responsible Person.
- **Documentation Author**: The person who enters information on any compliance form becomes the Documentation Author for that form.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

Feature Updates

Project Notes

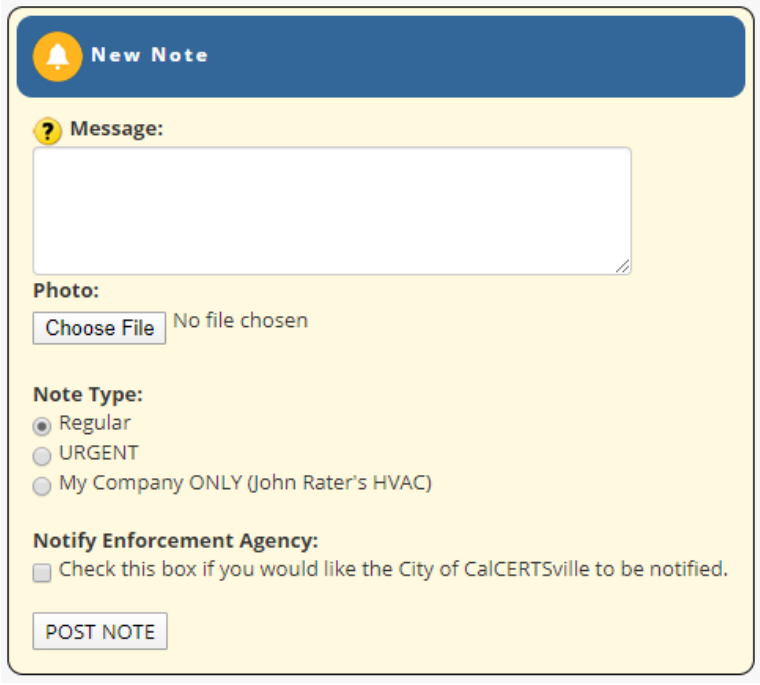
- **Project Notes give users the option to**

- Click the Project Notes

icon on the top of your 2016, 2019, or 2022 Standards Single Orientation or Alteration project to begin.
- Type the note you want to post in the message box.
    - Option to upload up to 10 JPG files and supporting documents.
- Select the note type, then
- Post the Note by clicking the 

icon.

    - **Regular:** This type of note will be visible to anyone who is shared with the project as well as the Enforcement Agency. An e-mail notification of the new Note will be sent to all subscribers.
    - **URGENT:** This is the same type of Note as a Regular Note, however, the e-mail notification will include the word "URGENT" in the subject. Also, the indicator for the new Note will indicate that it is urgent.
    - **My Company ONLY:** This type of Note will only be visible to users of your company and CalCERTS. Use this feature if you want to document information for personal reasons or for potential QA.
    - **Notify Enforcement Agency**: Indicate if you want to alert the Enforcement Agency. If you select this option, an e-mail will go out to the Enforcement Agency with instructions to visit the Project Notes page. Please be aware that Enforcement Agencies and CalCERTS will have visibility to all Project Notes.

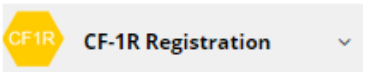


CF-1R Mass Upload

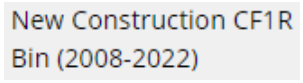
CalCERTS has implemented a feature to help users upload multiple CF1Rs simultaneously; the process will take your multiple XML Calculation Files and process them at one time. Once uploaded, you will be able to work with each individual plan.

This feature is available for all code cycles in our registry and is located within New Construction Projects and the CF1R Registration Bin.

To use this feature in the CF1R Registration Bin:

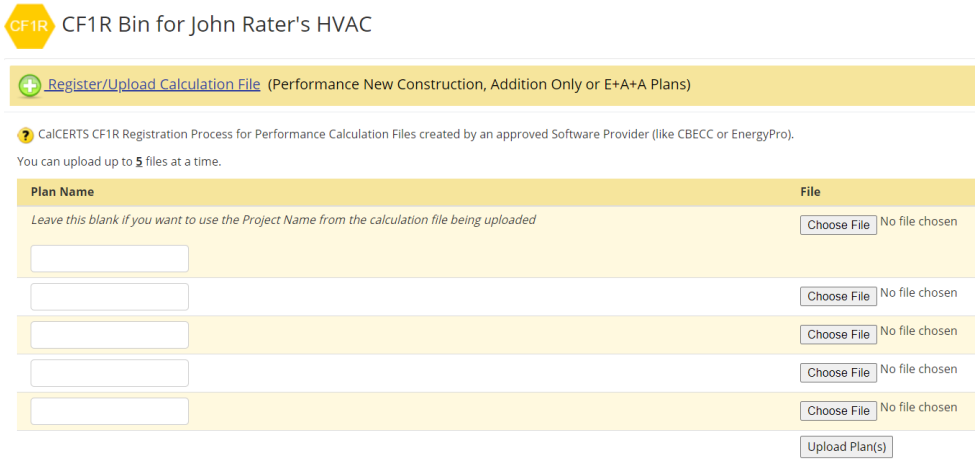
- Click 

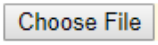
on the left menu.
- Select the following subcategories listed under CF1R Registration:

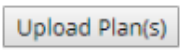


- Click the green add icon on the left located next to Register/Upload Calculation File.

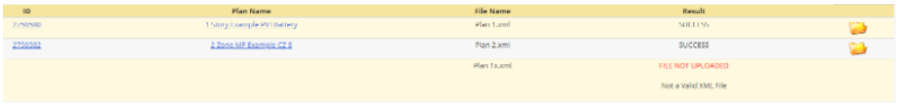
- Here up to 5 xml data files can be uploaded at one time. All code year mass upload bins will allow different code files (such as uploading a 2016 code xml into the 2019 code xml bin). Once uploaded the site will automatically categorize the xml into the appropriate code bin:



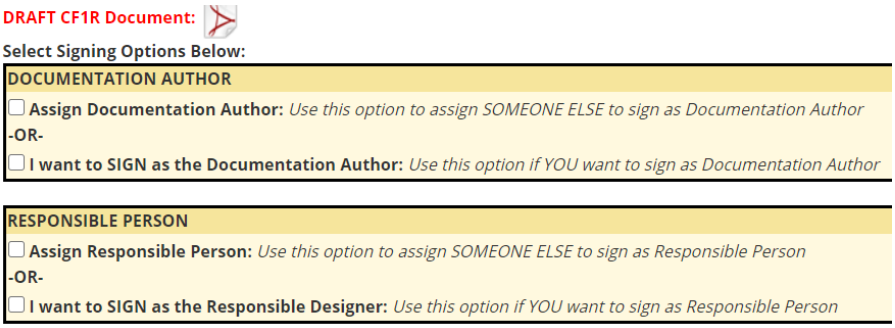
- Click 

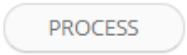
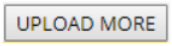
to select one xml data file at a time.
- Once all data files have been chosen, click 

. You will be directed to the Mass Upload confirmation page.
    - Here you can view the status of all data files uploaded, both successful and unsuccessful uploads.
    - A reason will display for any unsuccessful plans.
    - If only one data file is uploaded, you will be directed to the home page of that plan.



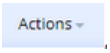
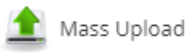
- Click to **Sign or Assign** the Documentation Author and Responsible Person.

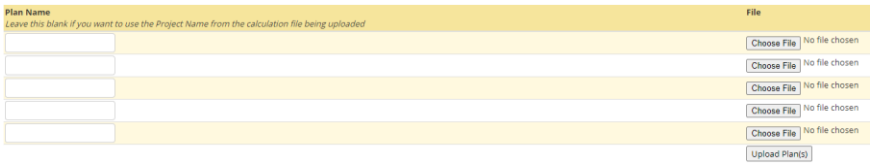


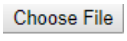
- Click Process  to proceed
- Click Folder icon to access the plan or click  to upload additional plans.

  Note: 2022 Energy Code Standards prohibit HERS Raters from signing as the Responsible Person on the Certificate of Compliance.

To use this feature within Single-Family Residence Multi-Orientation New Construction Projects:

- Access the project within www.calcerts.com.
- Click CF1R icon located in the project road map at the at the top page.
- Click Actions  dropdown located towards the upper right of the Plans page, then
- Select Mass Upload  .
- Here up to 5 xml data files can be uploaded at one time.



- Click  to select one xml data file at a time.

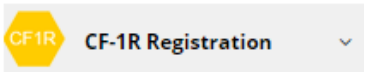
- Once all data files have been chosen, Click
- You will be directed to the Mass Upload confirmation page.
  - Here you can view the status of all data files uploaded, both successful and unsuccessful uploads.
  - A reason will display for any unsuccessful plans.
    - Click Actions, then click Mass Upload if needing to re-upload the correct file.

- If only one file is uploaded, you will be directed to the home page of that plan.

- Click Folder icon to access the plan or use the project road map

to access other available sections of the project.

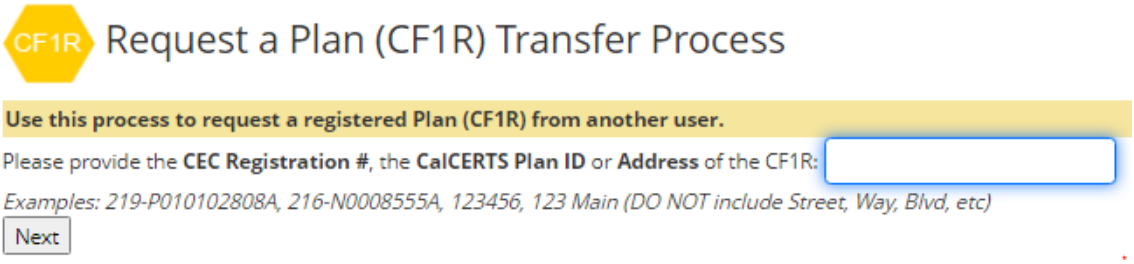
Request A Plan

- Click 

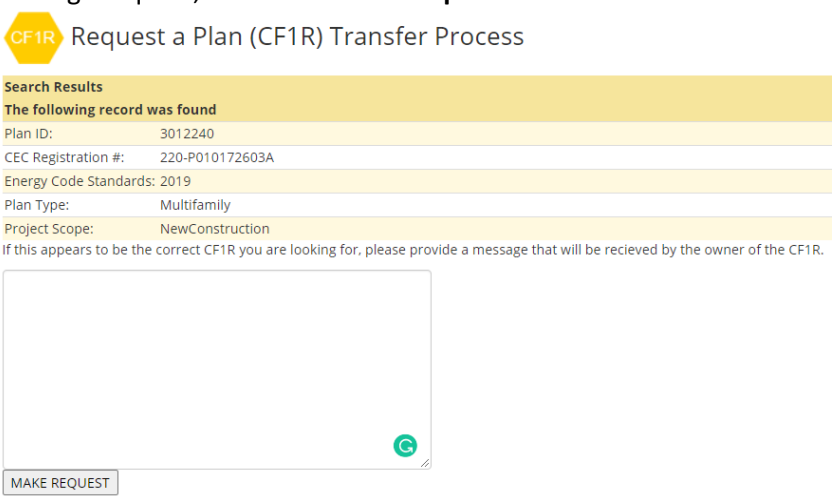
on the left menu.

- Select the following subcategories listed under CF-1R Registration dropdown:

- Enter the **CEC Registration Number**, the **CalCERTS Plan ID or Address of the CF1R**, then



- Click **NEXT**
- Enter a message request, then click **Make Request**.



- **Note:** Plan transfer request is only valid for CF1Rs uploaded in the **CF1R Bin** or **Single-Family** custom home projects.

Compliance Forms

The California Energy Commission in conjunction with Energy Code Ace maintains an up-to-date list of all compliance forms for Residential and Nonresidential Building Projects. The below hyperlinks will take you to the respective list of compliance forms.

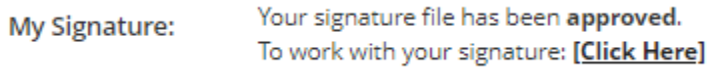
- 2022 Residential Compliance Forms
  - Certificates of Compliance – CF1R Forms
  - Certificates of Installation – CF2R Forms
  - Certificates of Verification – CF3R Forms
- 2022 Multi-Family Compliance Forms
  - Certificates of Compliance – LMCC Forms
  - Certificates of Installation – LMCI Forms
  - Certificates of Verification – LMCV Forms
- 2022 Nonresidential Compliance Forms
  - Certificates of Verification
- 2019 Residential Compliance Forms
  - Certificates of Compliance – CF1R Forms
  - Certificates of Installation – CF2R Forms
  - Certificates of Verification – CF3R Forms
- 2019 Nonresidential Compliance Forms
  - Certificates of Verification – NRCV Forms
- 2016 Residential Compliance Forms
  - Certificates of Compliance – CF1R Forms
  - Certificates of Installation – CF2R Forms
  - Certificates of Verification – CF3R Forms
  - Alteration and Addition Forms
- 2016 Nonresidential Compliance Forms
  - Certificates of Verification – NRCV Forms
- 2013 Residential Compliance Forms
  - Certificates of Compliance – CF1R Forms
  - Certificates of Installation – CF2R Forms
  - Certificates of Verification – CF3R Forms
  - Alteration and Addition Forms
- 2013 Nonresidential Compliance Forms
  - Certificates of Verification – NRCV Forms

Setting Signature

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

- Select the **My User Profile** from the dropdown menu.
- Click **My Settings** then,

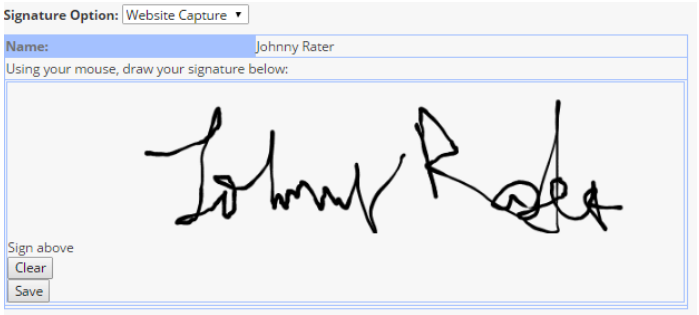
- Select the **Click Here** link to the right of **My Signature**.



- Next, select one of the three Signature Options: Font Style; Website Capture; or Scanned Image.
    - **Option 1**: Font Style

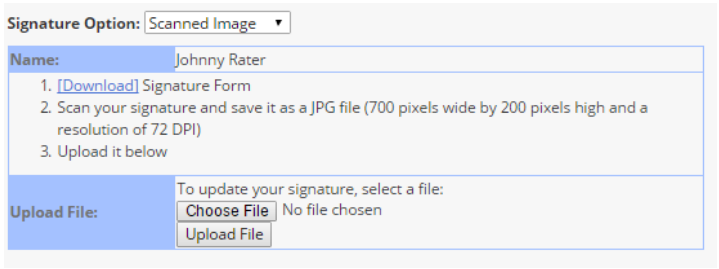
    - Select your preferred Font Style and click **Save Choice**.

- **Option 2**: Website Capture
    - Using the mouse, draw your signature in the website capture box.



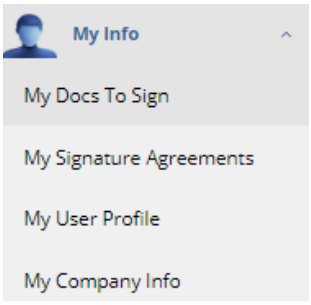
    - Once completed, select **Save**.

- **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.

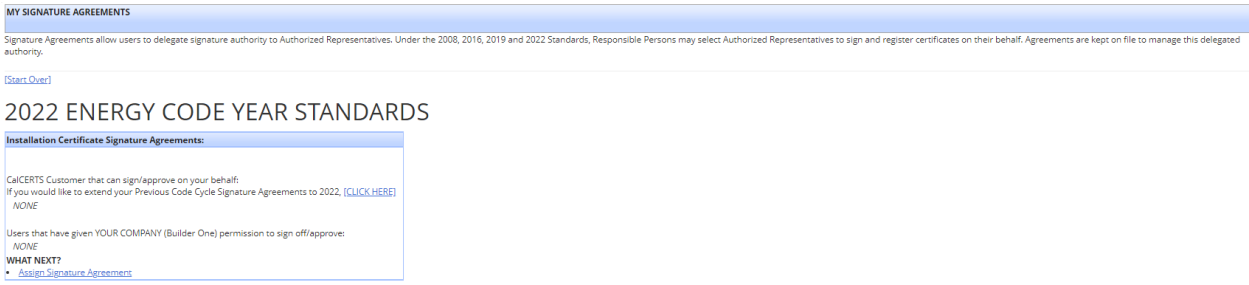


Signature Agreements

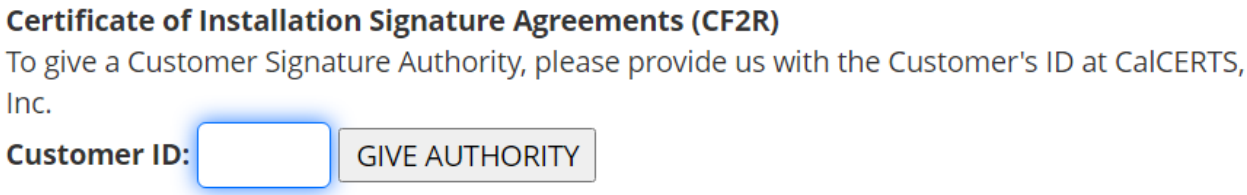
- Signature Agreements allow CSLB licensed Builders and Installers to delegate signature authority to Authorized Representatives. Under the 2008, 2016, 2019 and 2022 Standards, Responsible Persons may select Authorized Representatives to sign and register certificates on their behalf. Agreements are kept on file to manage this delegated authority.
- To manage Signature Relationships, select **My Signature Agreements** from the **My Info** menu.



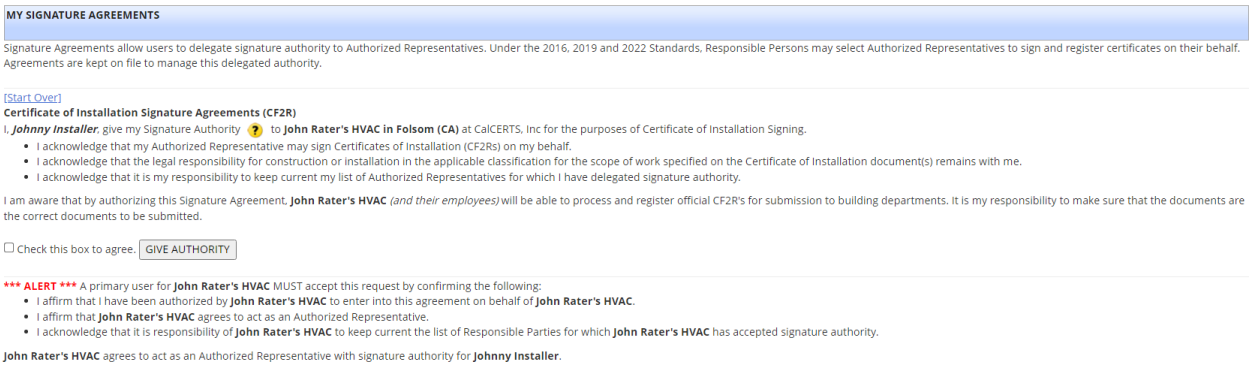
- **To Delegate Signature Authority**
  - Select **Assign Signature Agreements**.



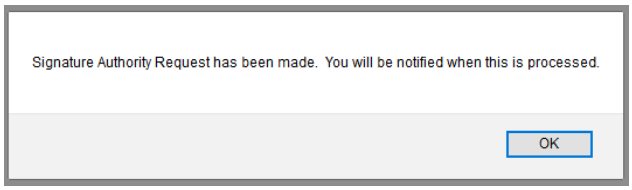
- Input the customer identification number for the company that authority is to be delegated.



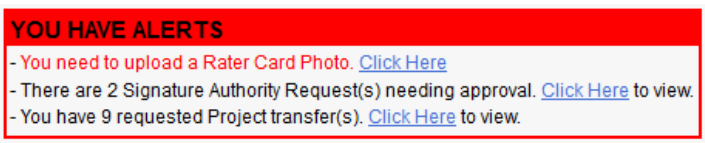
- *If the customer ID is not known, contact the customer directly. Each company has their own unique ID. The number is located under **My Info** then **My Company Info**. The ID is located at the top of the **My Company Info** page.*
- Select **GIVE AUTHORITY**.
- Next, review the Signature Authority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



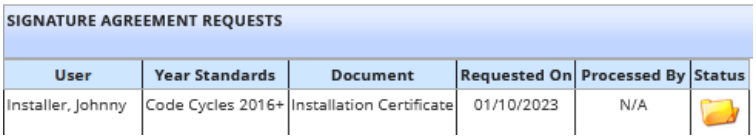
- Check the box to Agree.
- Select **GIVE AUTHORITY**.
- Next, an email will be sent to the targeted company to respond to the delegation of authority.



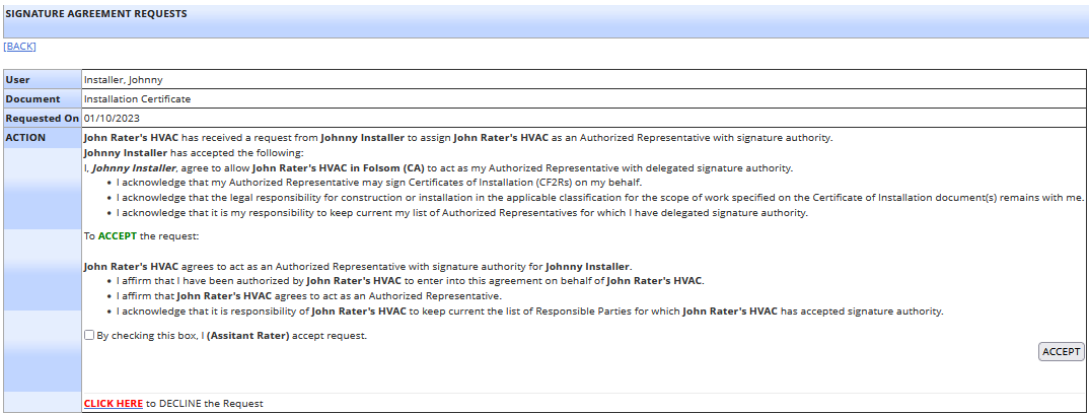
- **To Accept Signature Authority**
  - If a user has been delegated Signature Authority the user will receive an Alert Message.



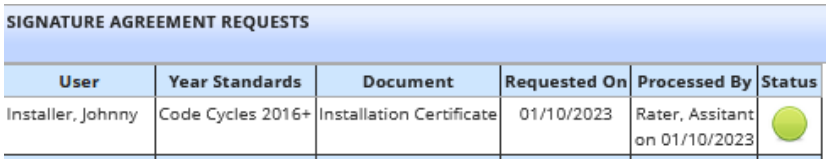
- Select the **Click Here** link in the Alert Message to view delegated authority requests.
- Next, select the folder associated with the active request.



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



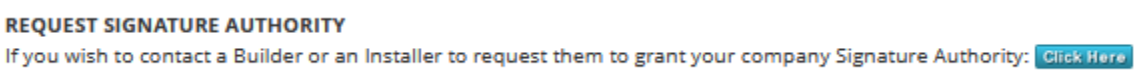
- Once **Accepted** or **Declined**, a confirmation page will display the date the agreement was requested and processed.



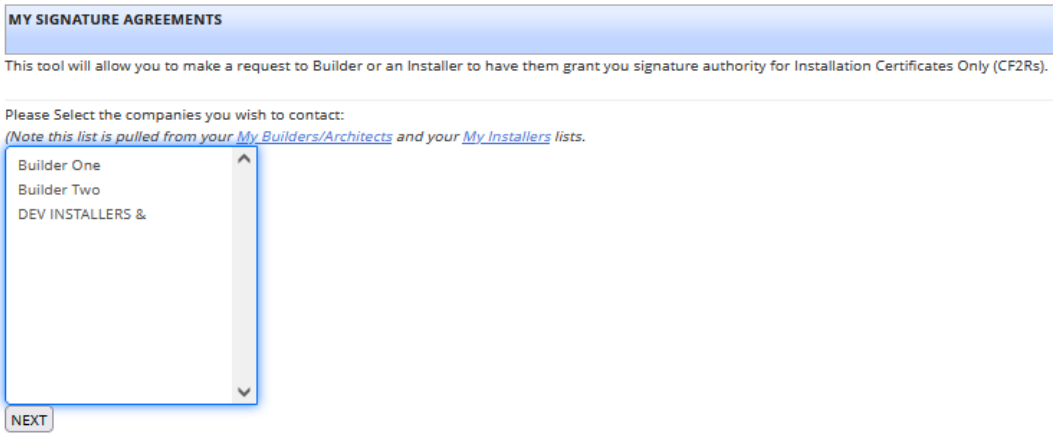
- Once completed, a PDF copy of the Signature Authority Agreement will be mailed to the parties of the Agreement.

- **To Request Signature Authority**
- Raters have the option to request signature authority under **My Signature Agreements**.

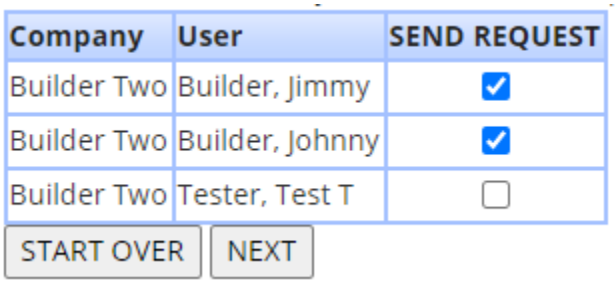
- Click the Click Here icon next to **Request Signature Authority**.



- Highlight the **Company Name** you are requesting signature authority from, then click **Next**.



- Check the individuals you would like to request signature authority from, then click **NEXT**.



- Click to send **E-Mail** request to the specified users.

  Note: Once the users confirm signature authority, you will receive an email notification.

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 CF1R, LMCC, NRCC and CF2R, LMCI, NRCI for new construction projects.
    - **My Energy Consultants/Designers** - This list contains Energy Consultants that may share or transfer projects and plans to complete CF1R, LMCC, NRCC.
    - **My Installers** - This list contains Installers that may be assigned projects to complete CF1R, LMCC, NRCC and CF2R, LMCI, NRCI for alterations and additions.
    - **My Raters** – This list contains Raters that may share or transfer projects and plans to complete the CF3R, LMCV, NRCV.

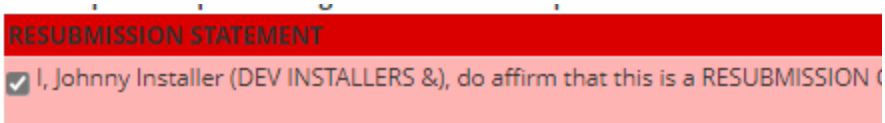
Making Corrections

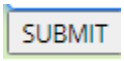
- To correct a form there are three options depending on the forms used and the type of correction needed. The three options are: **Edit**, **Untest**, or **Resubmit**.
    - To correct information in Alteration projects such as the Address, Permit Number or Building Department, the company controlling the project can make corrections by going to the project homepage and selecting the **Edit** link

.
    - To correct information on a Certificate of Compliance (CF1R, LMCC) when there are Certificates of Installation (CF2R, LMCI) and/or Certificates of Verification (CF3R, LMCV, NRCV) on file, the correction must be an **Untest**.
        - Only the company controlling the project can submit an Untest.
        - To submit an **Untest,** Open the applicable CF1R, LMCC, lot or address and select **Actions** then select **Request Untest**.

 from the dropdown.
        - To submit a CF2R, LMCI or CF3R, LMCV **Untest**, Select the form to Untest and input the required information such as the reason for the Untest then select **Submit Request**.

    - To correct information on Certificates of Installation (CF2R, LMCI) or Certificates of Verification (CF3R, LMCV, NRCV), use the **Resubmit** process.
        - To resubmit a form, Select the Resubmit icon next to any measure that needs correction, edit with the correct information, click the box and provide the reason for the resubmission, then select **Submit**.

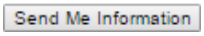




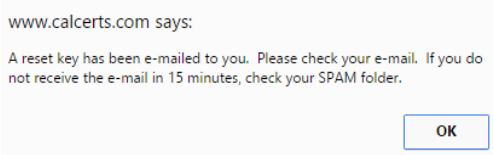
Note: Resubmitted certificates are identified by alphanumeric versions (A,B,C, etc.) at the end of the CEC registration number located on the bottom of each registered document.

Recover or Reset Password

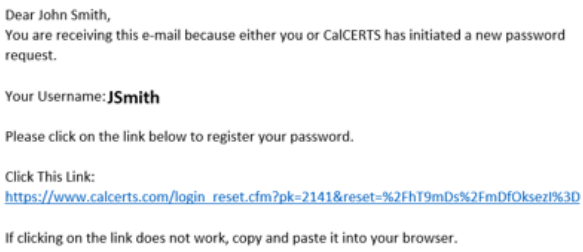
- Visit www.calcerts.com
- Click **Forgot Login**

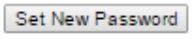
- Input your email address or Username.
- Click **Send Me Information** 

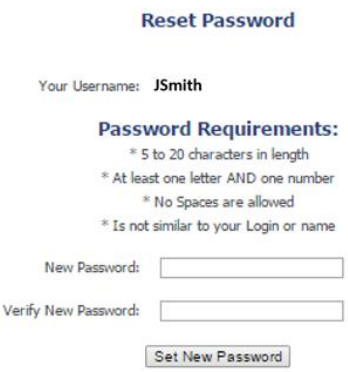
- *If you have forgotten the email address you registered with or no longer have access to that email address please contact support@calcerts.com directly.*
- Click **OK** to confirm a reset key has been emailed to you. *Depending on your browser you should see a similar confirmation below.*



- *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** 



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 **Standard Year.**
  - 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.

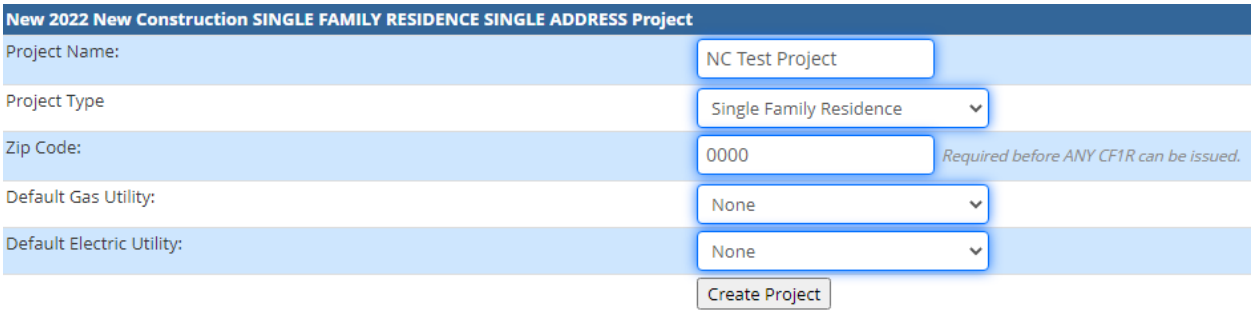
Note: Once the project type is selected, you will have additional options to further define the project on the next page.

New Construction – Residential Projects:

- Select the green add New Project icon to diplay a menu of **New Construction – Residential** Project Types, then
- Select the green add New Project icon next to the desired Project Type and respective Standards year.

Project Type	Year Standards					
	2005	2008	2013	2016	2019	2022
- Single Family Residence (**SFR**) - MULTIPLE BUILDINGS/DWELLINGS (Subdivision, Planned Neighborhood, etc) *Note - these type of projects ARE NOT FOR HOMEOWNERS. Performance Calculation File ONLY*	⊕	⊕	⊕	⊕	⊕	⊕
- Single Family Residence (**SFR**) - Custom Home - SINGLE BUILDING (Single Address, Single Orientation, Single Lot, etc) *Performance Calculation File or Prescriptive CF1R-NCB-01*	⊕	⊕	⊕	⊕	⊕	⊕
- Single Family Residence (**SFR**) - SINGLE ADDRESS **ADDITION ONLY** *Performance Calculation File or Prescriptive CF1R-ADD-01*	N/A	N/A	⊕	⊕	⊕	⊕

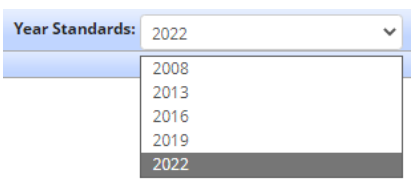
- Next, input the required information.



- Select Create Project

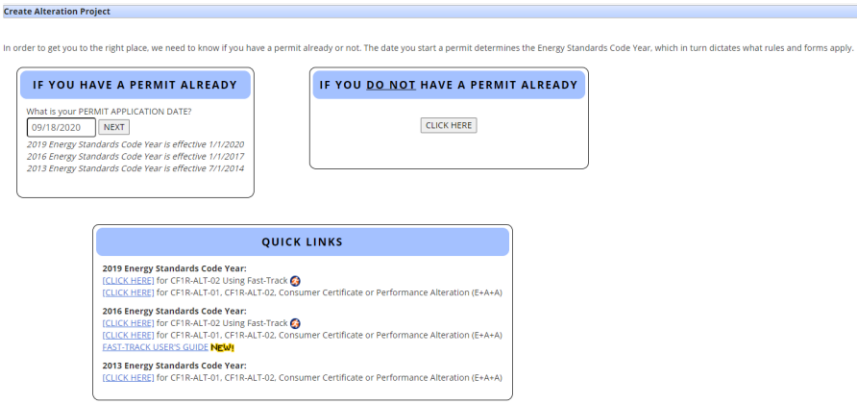
Alterations – Residential Projects

- Filter to the appropriate standards year, then Select the green add New Project icon.

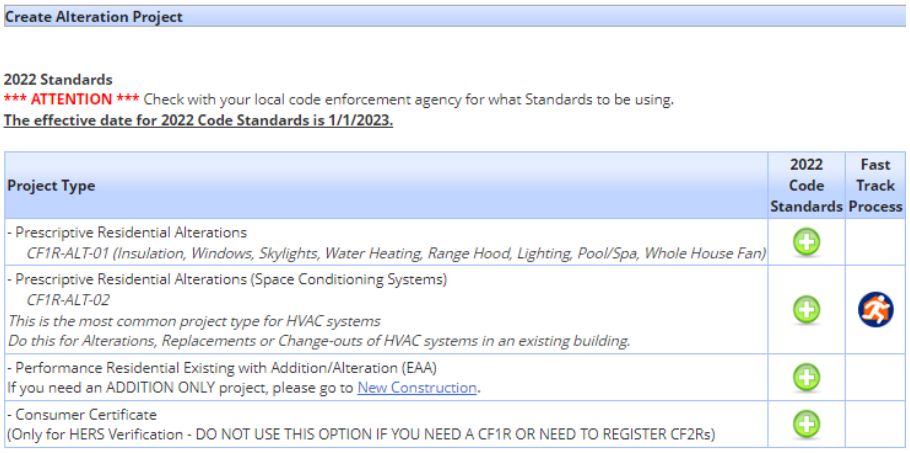


Note: Building Permit dates after 1/1/2023 will fall under the 2022 Code Standards.

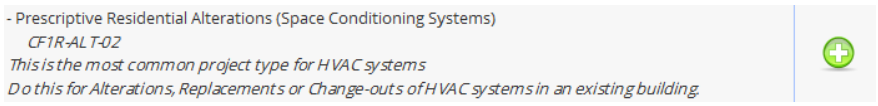
- Next, select the option that applies to you:



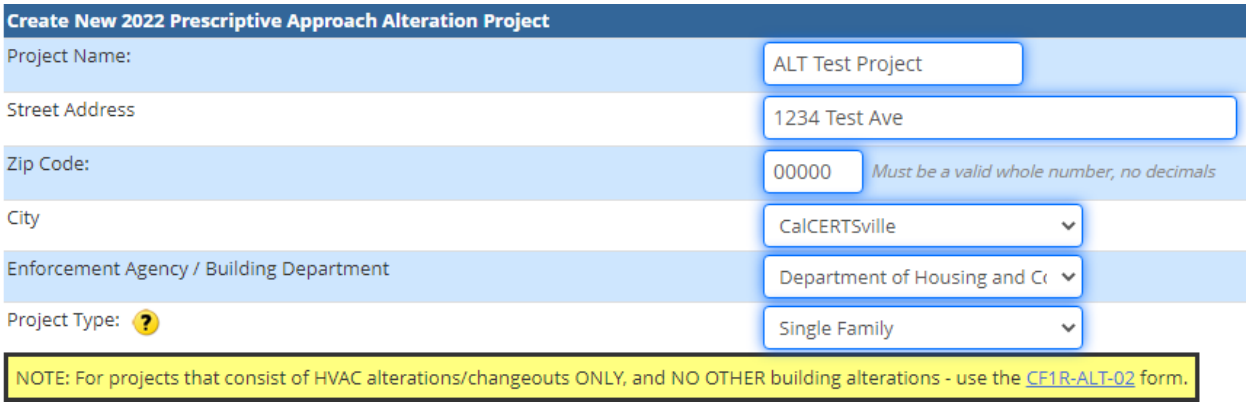
- Select the green add New Project icon to diplay a menu of **New Construction – Alteration** Project Types, then
- Select the green add New Project icon next to the desired Project Type.



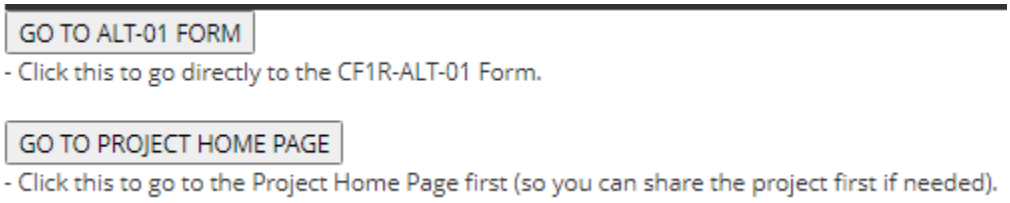
- Note: The most common Project Type under Residential Alterations is **Prescriptive Residential Alterations** which uses the **ALT-02.**
    - Select this Project Type for Alterations, Replacements or Change-outs of HVAC systems in an existing building.



- Next, input the required information.



- **Choose** to go directly to the CF1R-ALT-01 form *or* to the Project Home Page by clicking on the appropriate button. Either of these options will allow the user to complete the project **Creation** process.

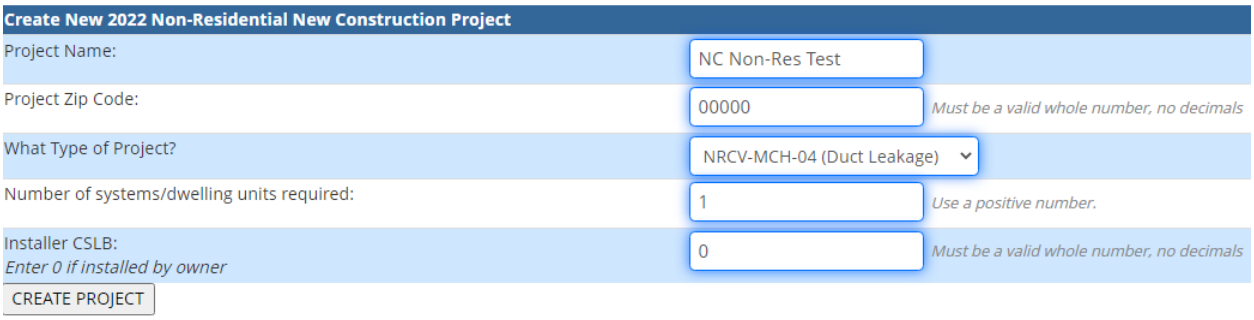


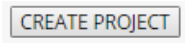
Non-Residential Project Types

- Select the green add New Project icon to diplay a menu of Non-**Residential** Project Types, then
- Select the green add New Project icon next to the desired Project Type and respective Standards year.

New Construction – Non-Residential Projects

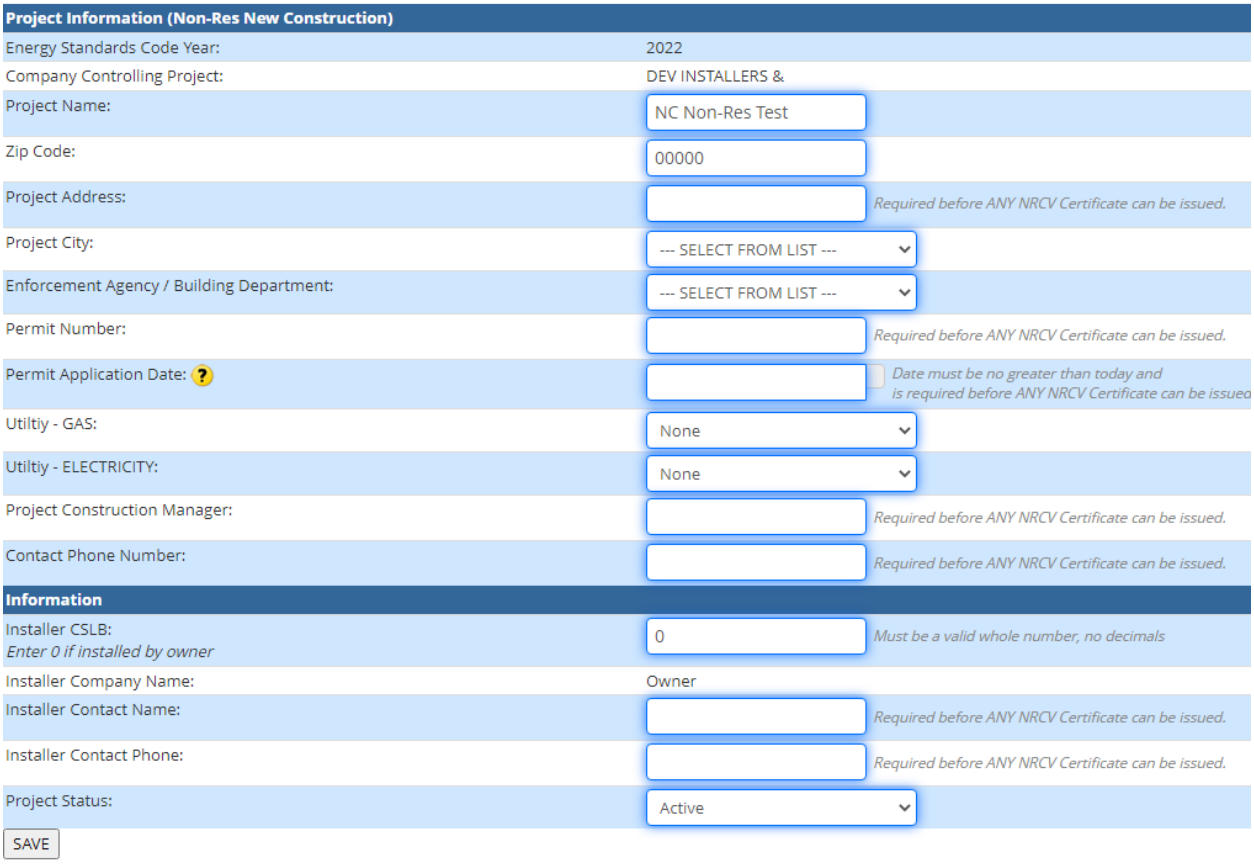
- Click the green add New Project – **Non-Residential** icon.
- Here you will input required information such as Project Name, Zip Code, and CSLB License.



- Select **CREATE PROJECT** 

.

- Once created, the Project Home Page will expand so the user can finish entering the remainder of information, then

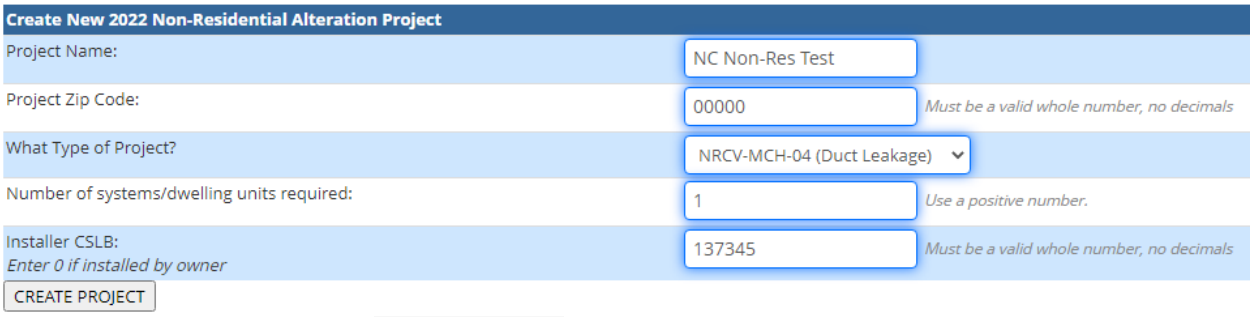


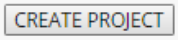
- Click **SAVE**

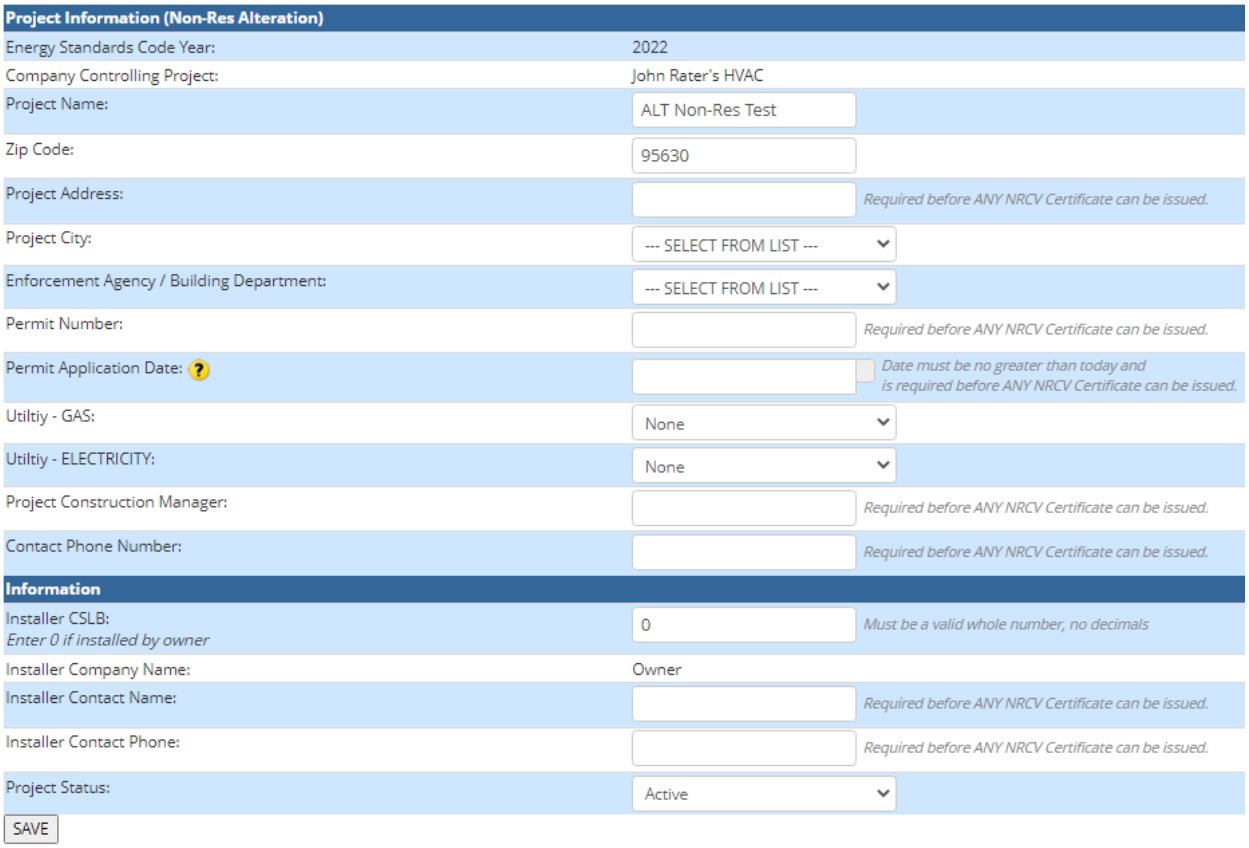
.

Alterations – Non-Residential Projects

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

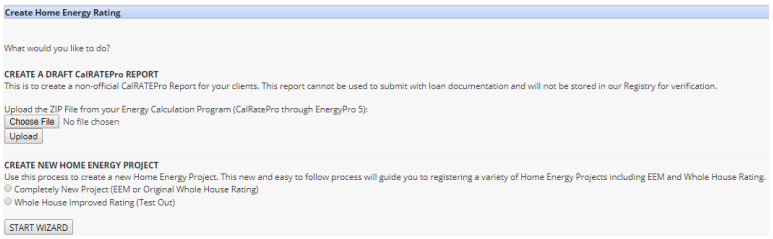


  - Select **CREATE PROJECT**  .
  - Once created, the Project Home Page will expand so the user can finish entering the remainder of information, then
  - Click **SAVE** .



Home Energy Ratings

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



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

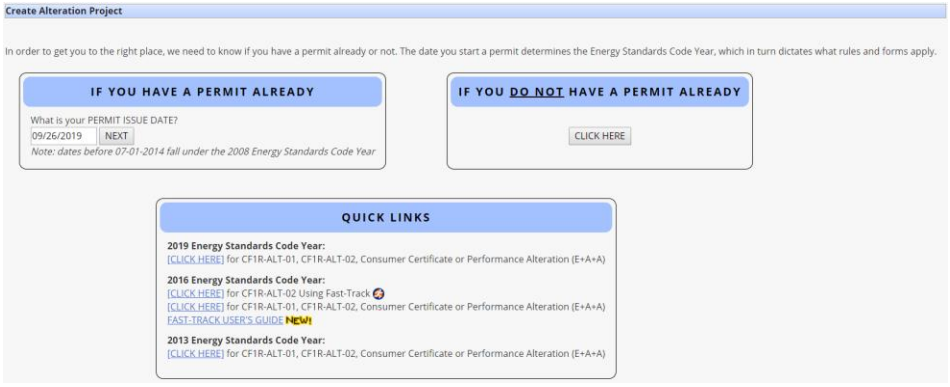
Sample Projects

Residential Alterations Fast-Track

- Click the **Projects** link

located on the left side menu bar.
- Click the **Alterations- Residential** link

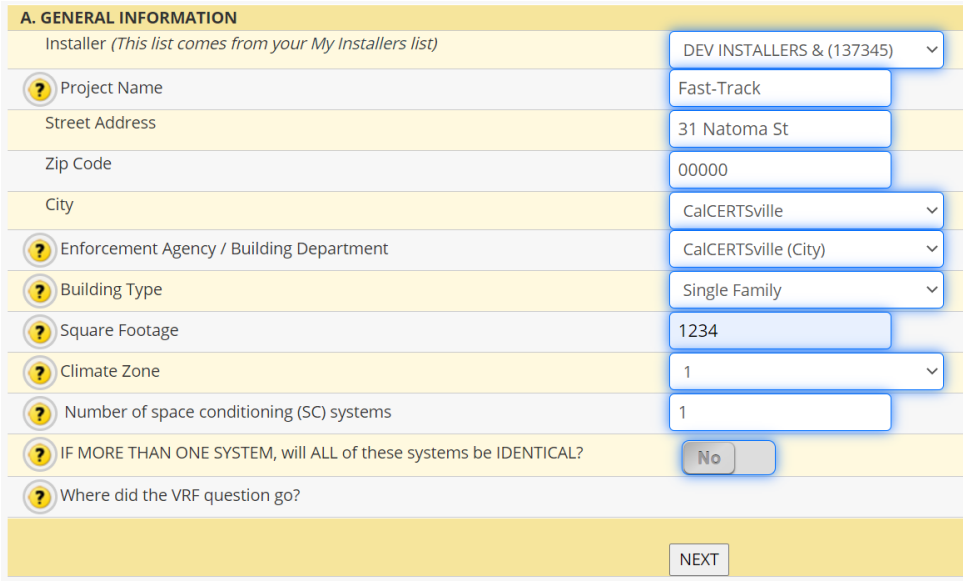
.
- Click the green add **New Alteration Project** icon.
    - ***Note**: The icon will be located in the upper right of the screen. The green plus symbol is a universal icon for anything new within the section of the site you are accessing.*
    - ***Note**: You can hover over any of the icons in order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



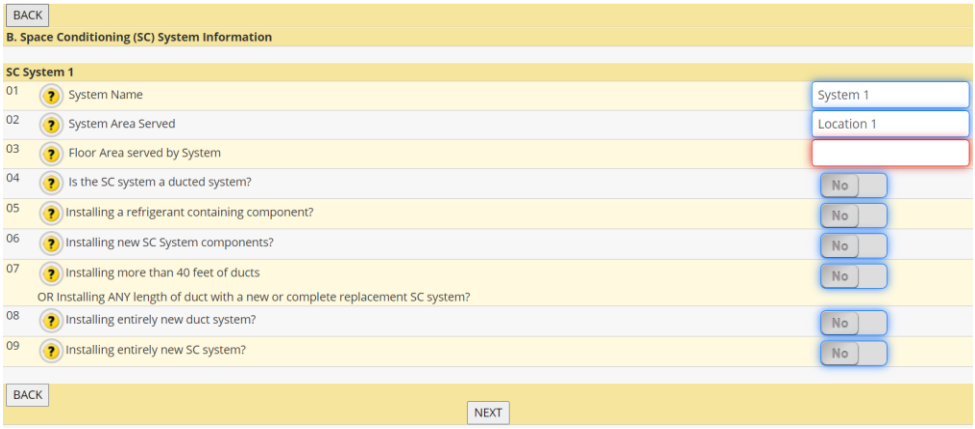
- Click the **New Project Fast Track** icon located to the right of **Prescriptive Residential Alterations CF1R-ALT-02** for Project Type.

Project Type	2022 Code Standards	Fast Track Process
- Prescriptive Residential Alterations *CF1R-ALT-01 (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan)*		
- Prescriptive Residential Alterations (Space Conditioning Systems) *CF1R-ALT-02* *This is the most common project type for HVAC systems* *Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.*		
- 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** link NEXT .

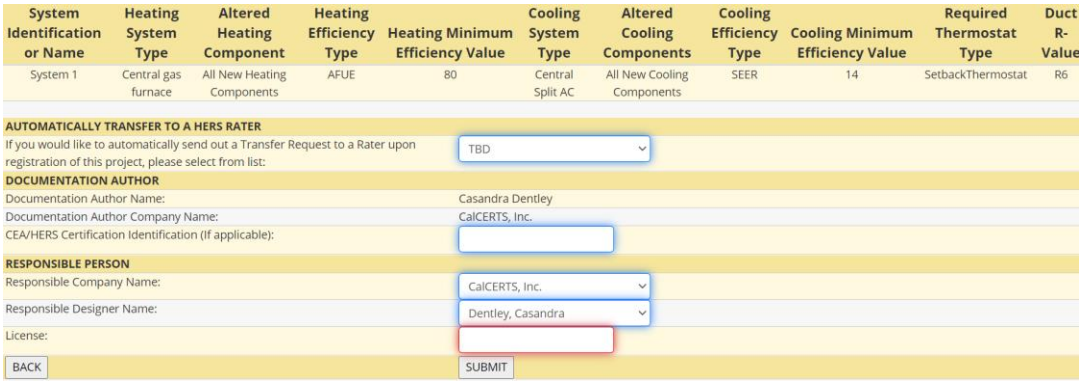


- Input the required information for Step 2 and Click **NEXT** link NEXT **.**



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

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



System Identification or Name	Heating System Type	Altered Heating Component	Heating Efficiency Type	Heating Minimum Efficiency Value	Cooling System Type	Altered Cooling Components	Cooling Efficiency Type	Cooling Minimum Efficiency Value	Required Thermostat Type	Duct R-Value
System 1	Central gas furnace	All New Heating Components	AFUE	80	Central Split AC	All New Cooling Components	SEER	14	SetbackThermostat	R6

AUTOMATICALLY TRANSFER TO A HERS RATER

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

DOCUMENTATION AUTHOR

Documentation Author Name: Casandra Dentley

Documentation Author Company Name: CalCERTS, Inc.

CEA/HERS Certification Identification (If applicable):

RESPONSIBLE PERSON

Responsible Company Name: CalCERTS, Inc.

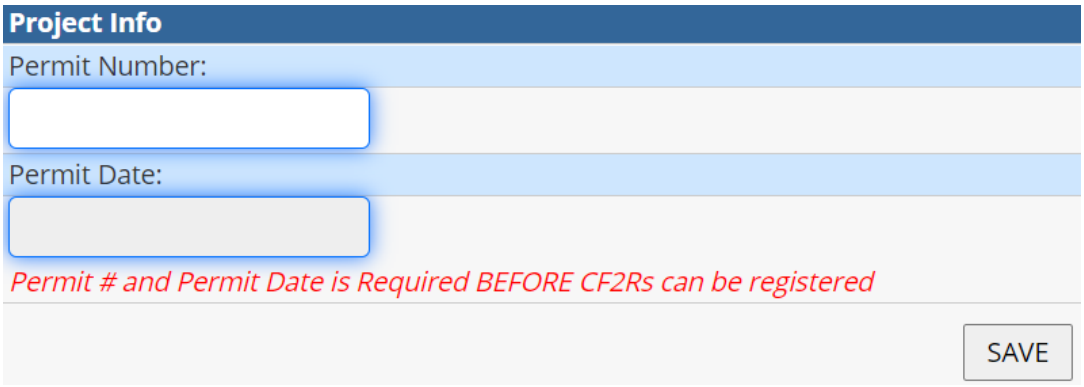
Responsible Designer Name: Dentley, Casandra

License:

BACK SUBMIT

Note: If you would like to automatically transfer the project to a HERS Rater, select the **Rater Name** from the drop-down.

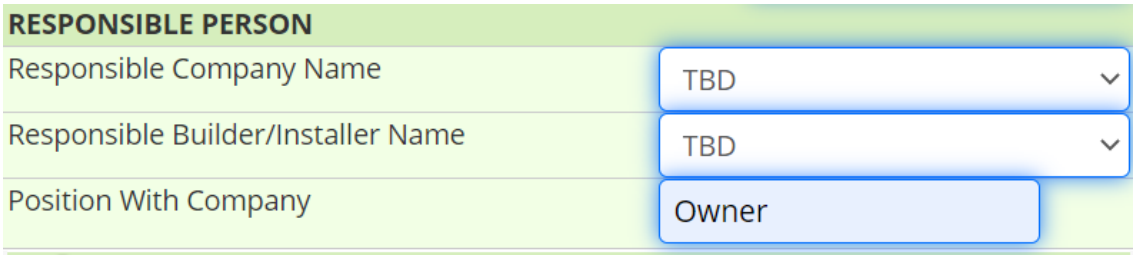
- Click the PDF icon to review the unofficial CF1R and close once it has been reviewed.
- Click the Pencil icon to certify you have reviewed and approve the PDF document.
- In order to proceed to the CF2Rs, you MUST first enter in the **Permit Number**, **Permit Date,** the click **SAVE**.



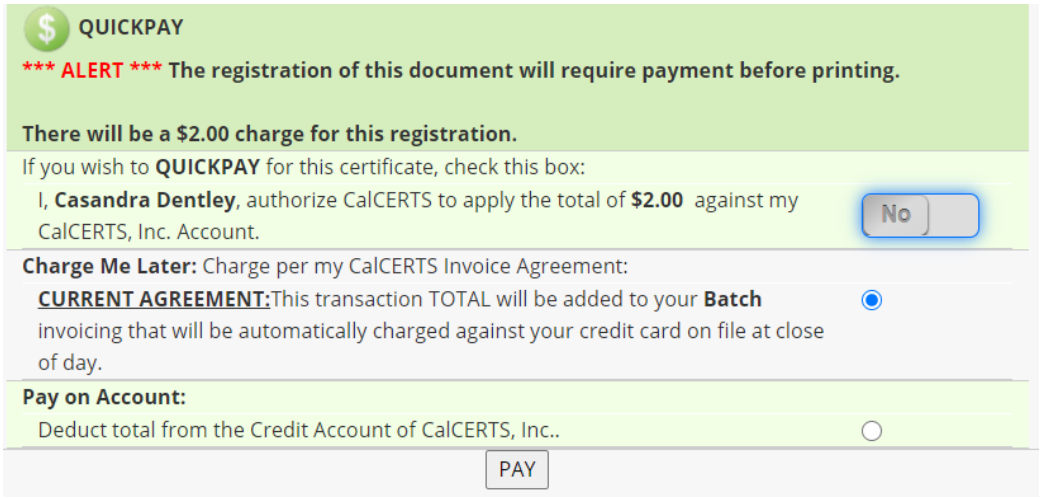
- Click the **Report Results** link Report Results for the CF2R-MCH-01b.

- 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.



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



    - ***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 Pencil icon.*
    - ***Note**: Click the PDF icon to review any documents before approving them.*
- Click the SIGN ALL icon to approve all completed CF2Rs.

- Next enter in the Homeowner Info, then click **SAVE**.

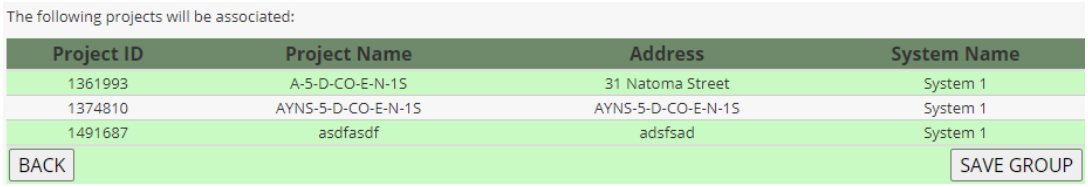
- If the project has not been transferred to the HERS Rater, please enter in the Rater's CalCERTS Rater ID Number, then click **Transfer**.

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

icon to begin assembling your sample groups.
- Click the default No

to Yes

in order to select the lots you would like to associated, then click **NEXT**.
- Verify the sample group, then click **SAVE GROUP**.



- *Next the CF3Rs can be registered.*
- Click the **Report Results** link

located to the right of the CF3R you would like to access.

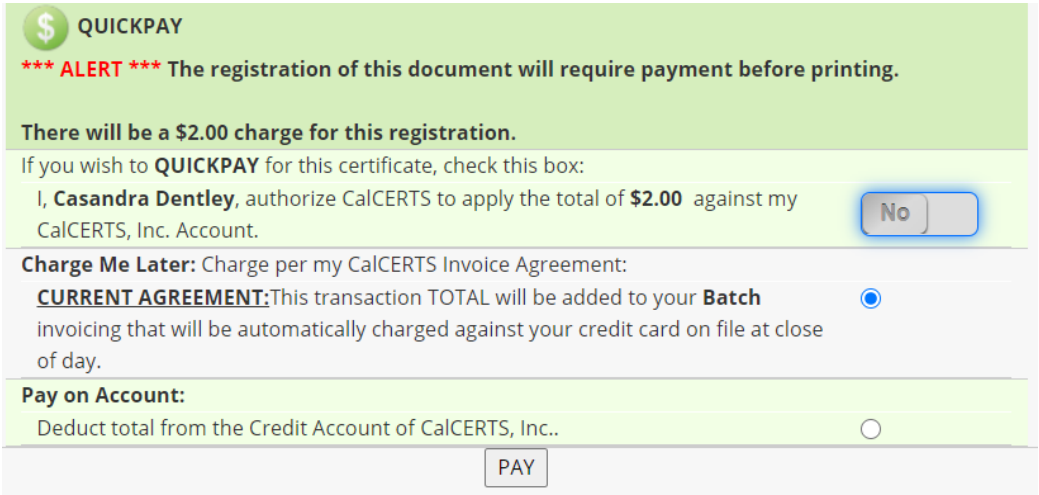
- Input CF2R Results; Click **NEXT**

or **BACK**

to navigate through the pages.

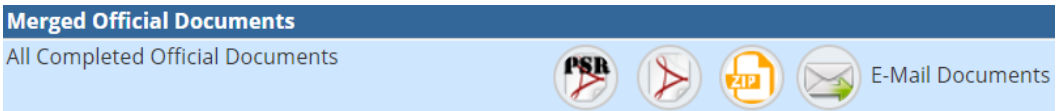
- On the final page, Click the drop down to select the **Responsible Builder/Installer Name** and **Company Name** and input the Position with Company.

- Click the **SUBMIT** link SUBMIT.
    - ***Note**: Next you can input any remaining CF3Rs by Clicking **Report Results*** Report Results.
- Click the Pay icon located to the left of any of the CF3Rs.
- 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**.*



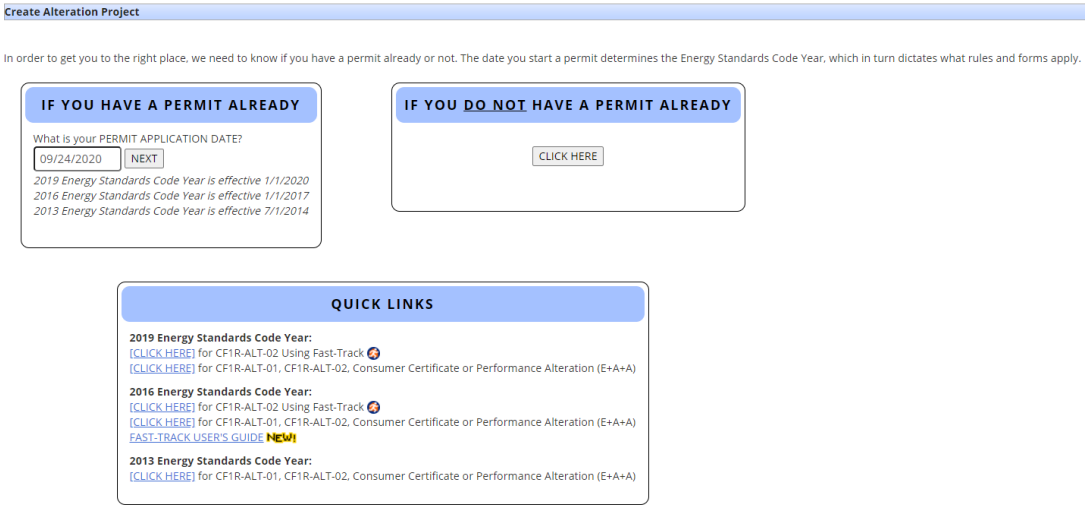
    - ***Note**: You can proceed with inputting the remaining CF2Rs by Clicking **Report Results*** Report Results *located to the right of the CF2R or Approve the current CF2Rs on file by Clicking the Pencil icon.*
    - ***Note**: Click the PDF icon to review any documents before approving them.*
- Click the SIGN ALL icon to approve all completed CF2Rs.

  All official documents will be displayed to download or email.



Residential Alterations

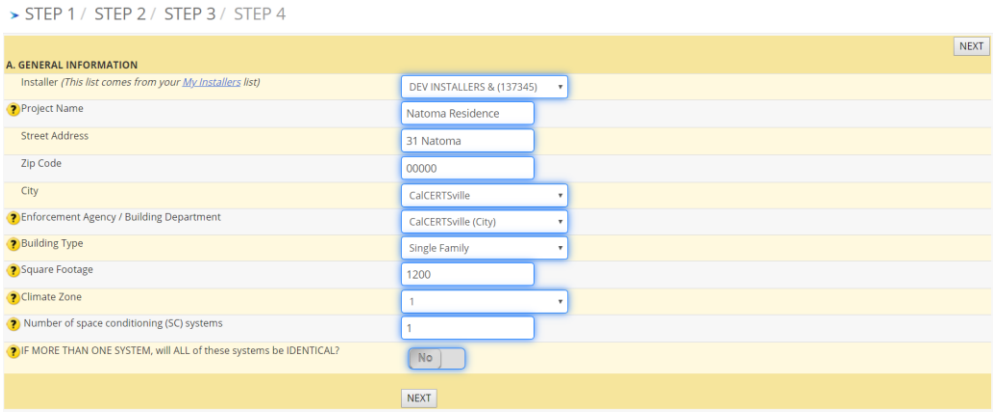
- Click the **Projects** located in the menu on the left.
- Click the **Alterations- Residential** from the dropdown.
- Click the green add **New Alteration Project** icon.
    - ***Note**: The icon will be located in the upper right of the screen. The green plus symbol is a universal icon for anything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



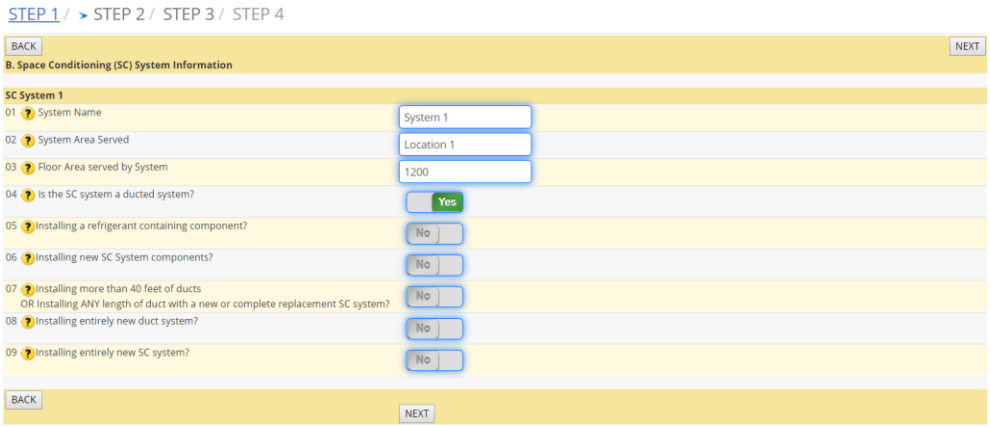
- Click the green add New Project icon located to the right of **Prescriptive Residential Alterations CF1R-ALT-02** for Project Type.

Project Type	2022 Code Standards	Fast Track Process
- Prescriptive Residential Alterations *CF1R-ALT-01 (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan)*		
- Prescriptive Residential Alterations (Space Conditioning Systems) *CF1R-ALT-02* *This is the most common project type for HVAC systems* *Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.*		
- 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)		

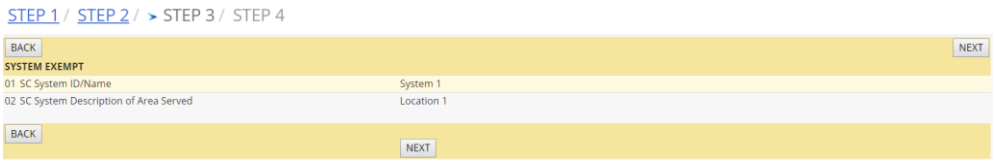
- Input the required information for Step 1 and Click **NEXT** link .



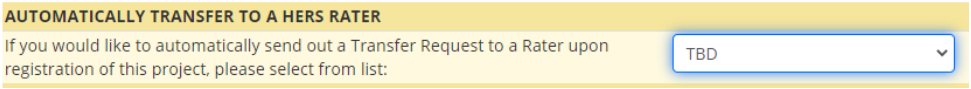
- Input the required information for Step 2 and Click **NEXT** link NEXT**.**



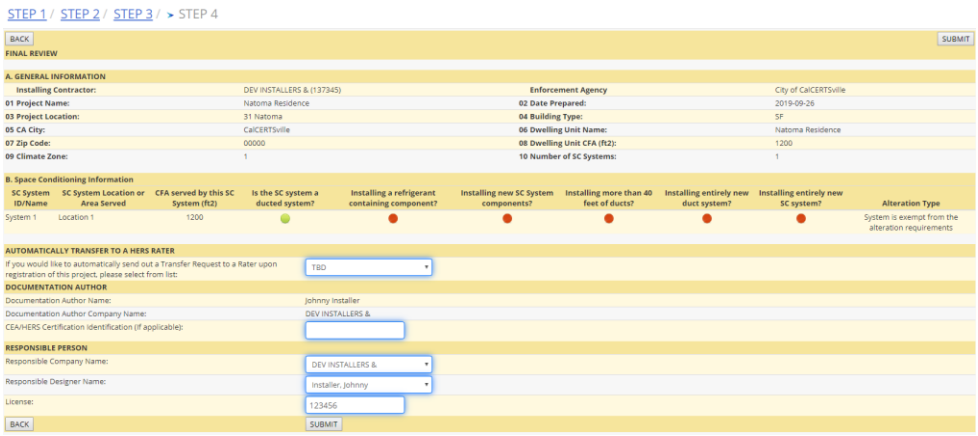
- Input the required System information for Step 3 and Click **NEXT** link NEXT.
- *The information required on Step 3 varies from the Step 2 selections.*



- Visually confirm your information is accurate.
  - **Note:** *If you already have a HERS Rater you can select the Rater from the drop-down to have the project* ***automatically transferred to the Rater****.*

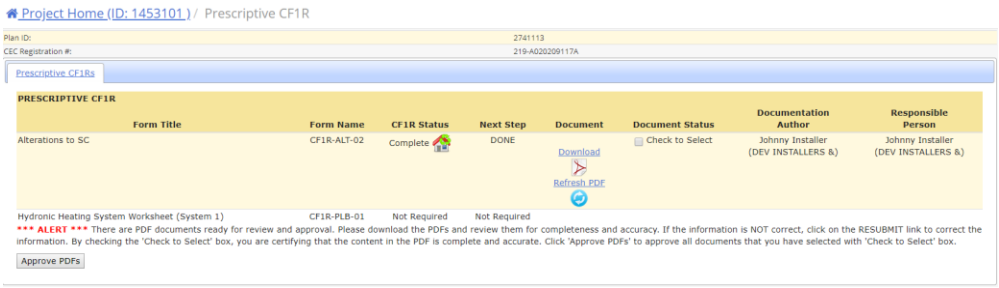


  - ***Note****: If you do not yet know who your HERS Rater is you can skip this step until you are ready for the CF3Rs to be registered.*
- Click the drop down to select the **Responsible Person** and **Company Name** for Step 4 and Click the **SUBMIT** link SUBMIT**.**

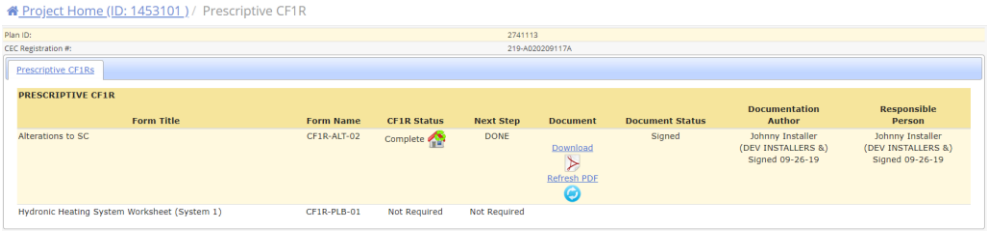


- Click the PDF icon to review the unofficial CF1R and close once it has been reviewed.

- Click the check box Check to Select to certify you have reviewed and approve the PDF document.



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

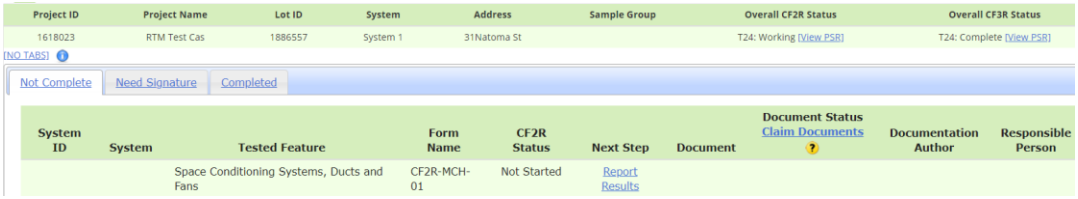


- Click the PDF icon to access the official CF1R.
    - ***Note**: In order to proceed to the CF2Rs, you must first enter in the **Permit Number**.*

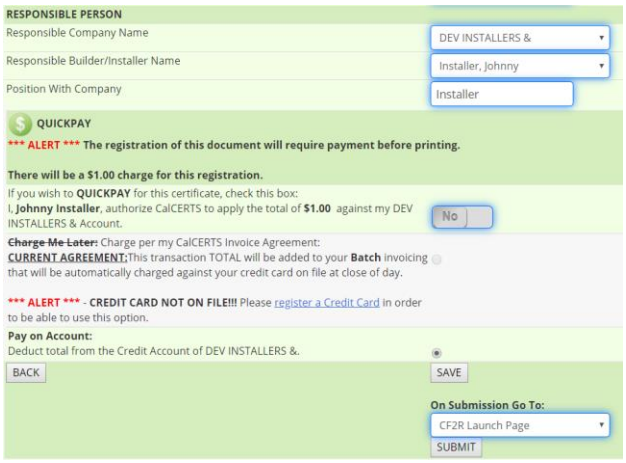
- Click Permit Number on the top of the screen next to the **What's Next** alert.

*** ALERT *** - **What's next?** Before you can move on to the CF2Rs, you need to provide the Permit Number information.

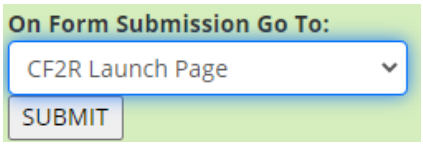
- Input the required Project Home information and Click **SAVE** SAVE.
  - Permit Number and Permit Date.
  - Home Owner's name and phone number.
- Click **OK** OK to confirm the information has been Saved.
  - ***Note**: The company controlling the project can Click **Edit** Edit if needing to modify the project home information available for edit.*
- Click directly on the CF2R CF2R icon located in the project road map at the top of the page.
- Click the **Report Results** link Report Results for the CF2R-MCH-01b.



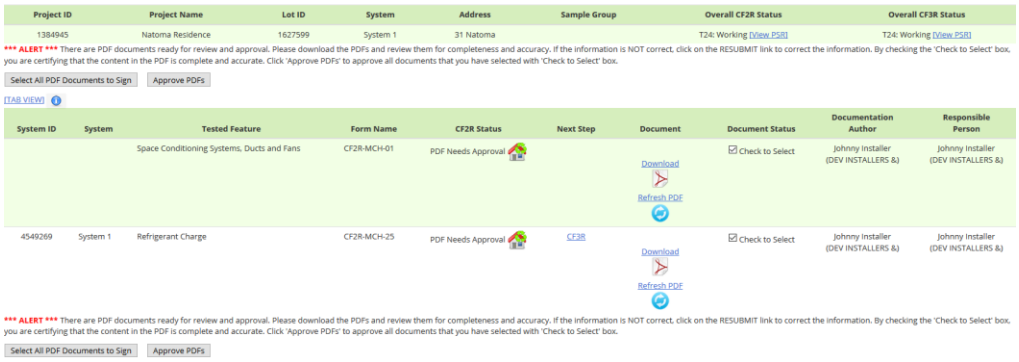
- Input CF2R Results; Click **NEXT** NEXT or **BACK** BACK to navigate through the pages.
- On the final page, Click the drop down to select the **Responsible Builder/Installer Name** and **Company Name** and input the Position With Company.



  - **Note**: *You can select one of the payment options now or wait to pay once the CF2R is certified.*
  - **Note**: *You have the option to **default the landing page** to the CF2R page or automatically go into the next CF2R to be completed.*

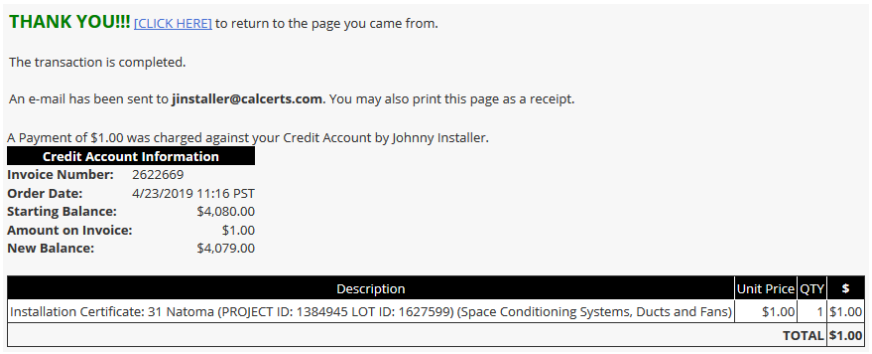


- Click the **Submit** link SUBMIT.
  - ***Note**: You can proceed with inputting the remaining CF2Rs by Clicking **Report Results** Report Results located to the right of the CF2R or Approve the current CF2Rs on file by Clicking the **check boxes** Check to Select and Clicking **Approve PDFs** Approve PDFs.*
  - ***Note**: Click the PDF icon to review any documents before approving them.*
- Click the **check boxes** Check to Select to the right of the CF2Rs located under Document Status.



- Click **Approve PDFs** link Approve PDFs.
- Click the Pay icon located to the right of any of the CF2Rs.
  - ***Note**: If you are in the tabs view, you will need to click Completed or click [NO TABS] in order to view the **Completed Documents**.*

- 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**: Next you can Sample if applicable. This is an optional step and only applies to projects needing Sampling that have **ALL CF2R completed**.*

- Click directly on the **Sample** link

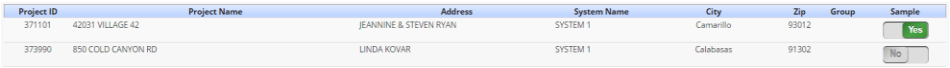
located at the top of your Project Home page.

- Click the default No

to Yes

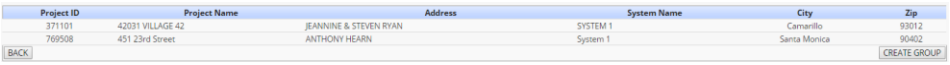
in order to select the projects you would like to associate.

  - ***Note**: The current project you have open will automatically be included in the sample group.*



- Click the **NEXT** link

.



- Click the **CREATE GROUP** link

.

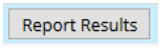
- Click **OK**

to confirm group has been created.

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

- Click directly on the **CF3R** link

located at the top of your Project Home page.

- Click the **Report Results** link 

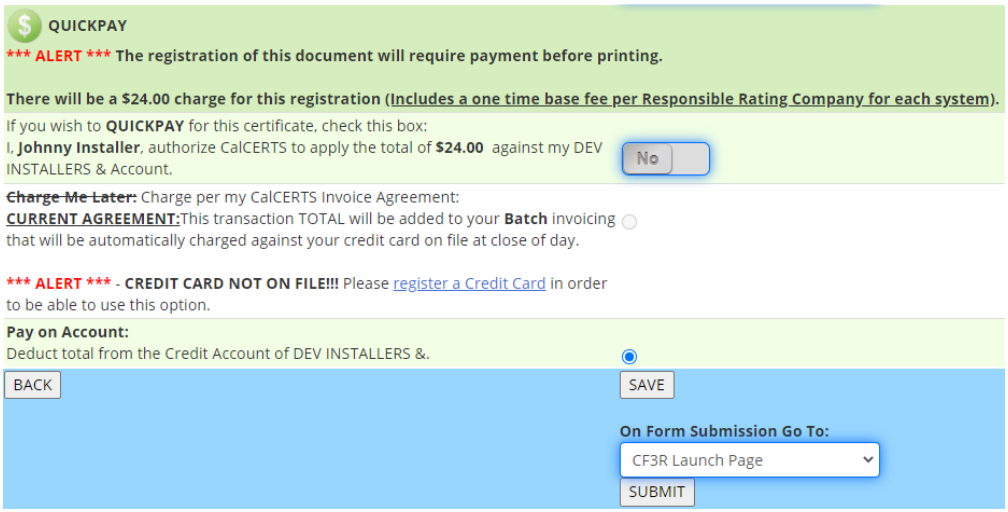
located to the right of the CF3R you would like to submit.

- Input CF3R Results; Click **NEXT**

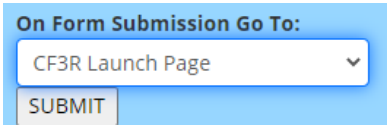
or **BACK**

to navigate through the pages.

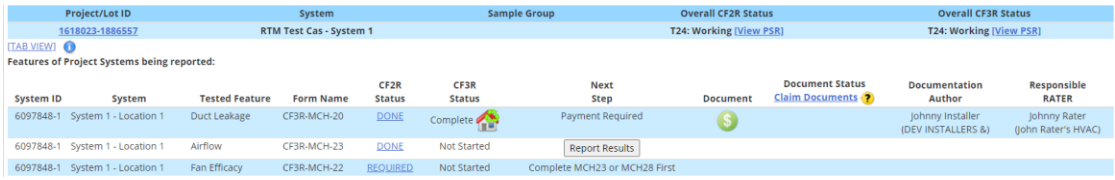
- On the final page, Click the drop down to select the **Responsible Rater Name** and **Company Name**.



- **Note:** *If there is not a HERS Rater defined on the project, you will first need to Transfer or Share the project with the Rater prior to submitting the CF3Rs.*
- **Note**: *You can select one of the payment options now or wait to pay once the CF3R is certified.*
- **Note**: *You have the option to **default the landing page** to the CF3R page or automatically go into the next CF3R to be completed.*



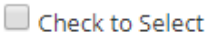
- Click the **SUBMIT** link SUBMIT.
  - ***Note**: Next you can input any remaining CF3Rs by Clicking **Report Results*** Report Results.

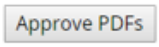


- **Note**: *If you are in the tabs view, you will need to click* Completed *or click* [NO TABS] *in order to view the **Completed Documents**.*

- 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** 

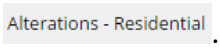
located under Document Status.
- Click **Approve PDFs** 

.
  - ***Note**: Click the PDF icon to access the official registered CF3Rs.*
  - ***Note**: All documents can be downloaded or emailed using the links at the top of the screen.*

Existing Buildings with Additions/Alterations

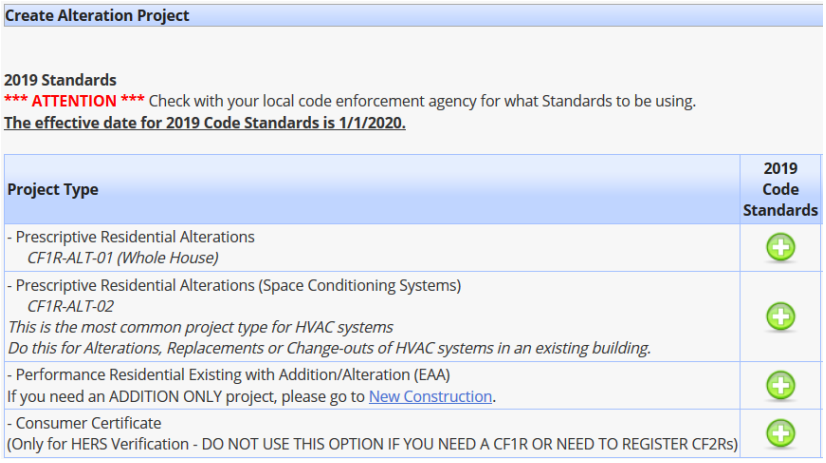
***Note**: Only certified Whole House HERS Raters can register a CF3R-EXC-20.*

- Click the **Projects** link

located on the left side menu bar.
- Click the **Alterations - Residential** link 

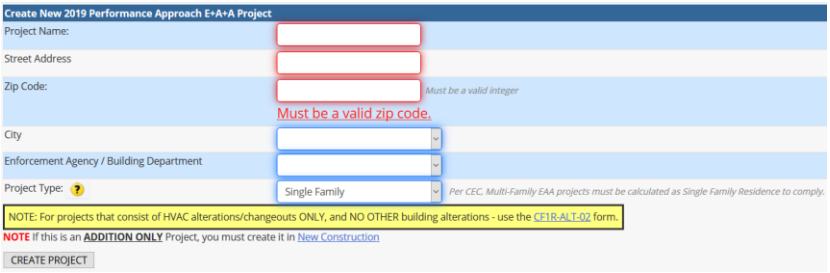
.
- Click the green add New Alteration Project icon.
- Select the option that applies to you:

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



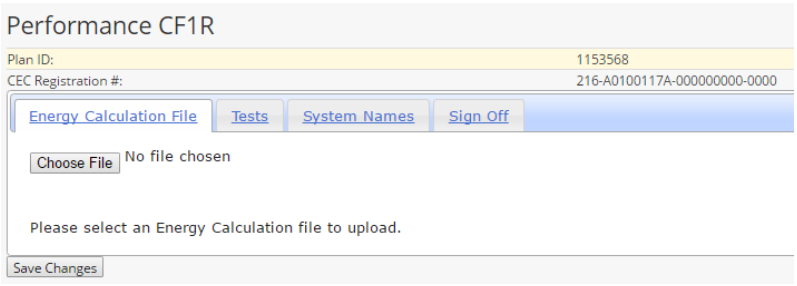
  - ***Note**: If you need an ADDITION ONLY project, please register your project under New Construction Residential.*

- Input the required project information:



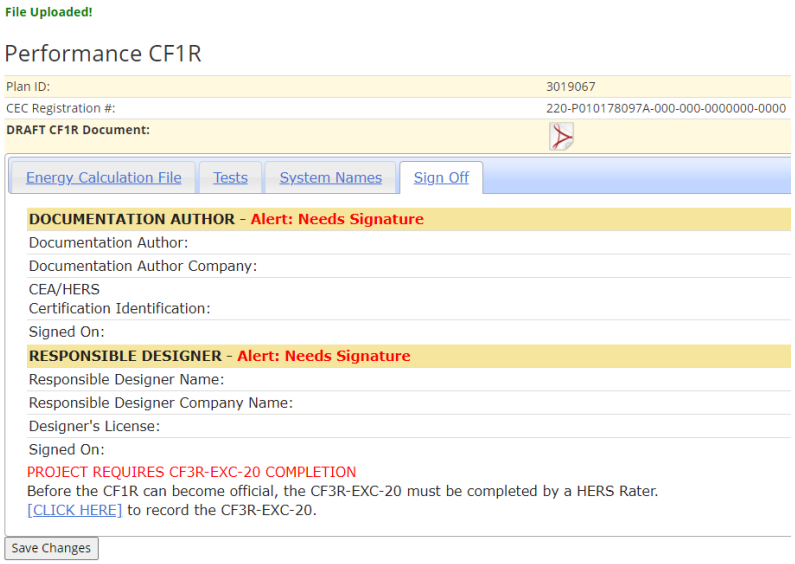
- Click **CREATE PROJECT** CREATE PROJECT .
- Click **OK** to confirm the project has been created.

- Click the **Choose File** link Choose File OR Click the **Browse** link Browse... .

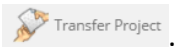


- Locate the .xml file and Click the **Save Changes** link Save Changes .
  - ***Note:*** *The page will automatically default to the Sign Off tab and the option of Choose File or Browse will depend on what browser you're using.*

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



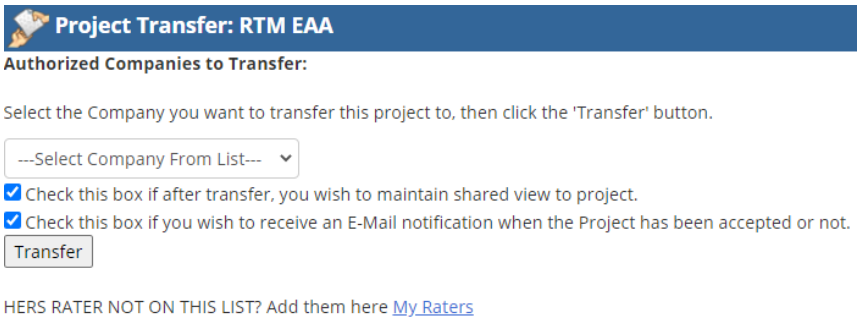
  - ***Note****: If the project WAS NOT created by the HERS Rater or NOT currently controlled by the HERS Rater you can* ***TRANSFER*** *the project to the HERS Rater by:*
- Click the **Actions** link Actions located in the upper right of the project.

- Click **Transfer Project** 

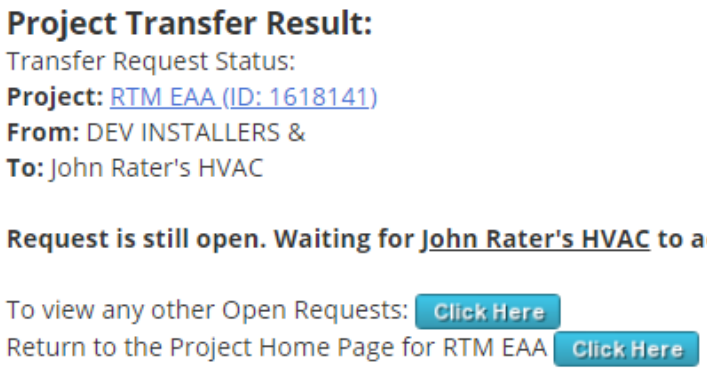
.
- Click the drop down to select a Rating Company from your list.
  - ***Note**: If you do not see the company in your list Click the **My Raters***

link.
  - ***Note**: The check box, in order to maintain shared access, will automatically be checked*.
- Click **Transfer**

.



- ***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.*



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

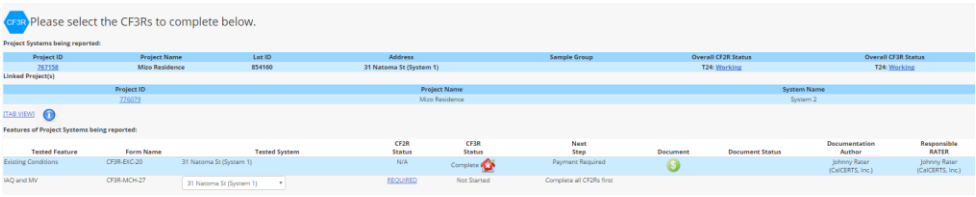
- Click directly on the **CF1R** link

located at the top of your Project Home page.
- Click the [CLICK HERE] link to record the CF3R-EXC-20 under the Sign Off tab.
- Input the CF3R-EXC-20 Results; Click **NEXT**

or **BACK**

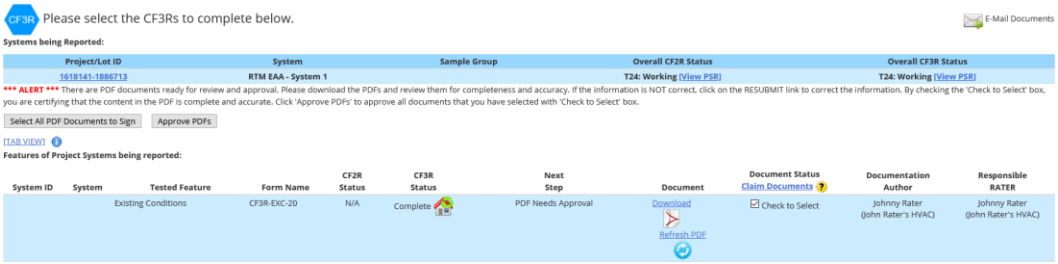
to navigate through the pages.
- On the final page Click the drop down to select the **Responsible Rater Name** and **Company Name**.

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

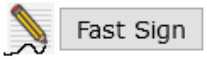


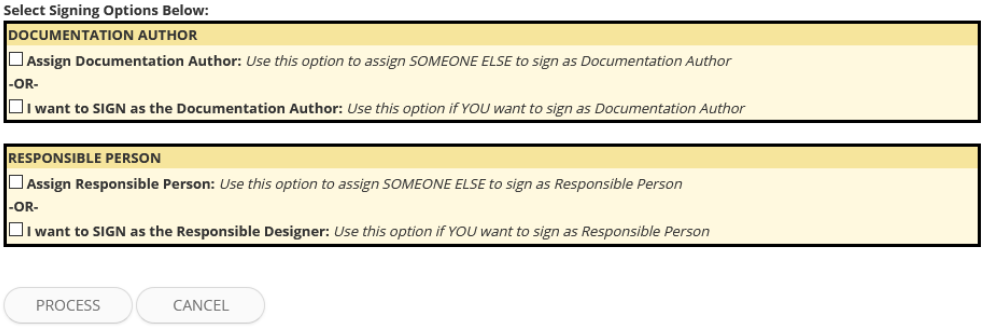
    - ***Note:** The next step is to proceed with payment for the CF3R-EXC-20. Any users with access to the project may submit payment for any of the items available.*

- Click the Pay icon.
- Follow the prompts in the shopping cart 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.*

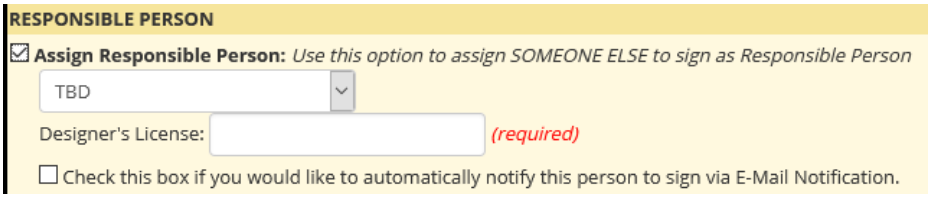


- Click the check box located under Document Status.
- Click **Approve PDF** Approve PDF.
  - ***Note:** Next, the Certificate of Compliance must be signed and paid for.*
- Click directly on the **CF1R** link CF1R located at the top of your Project Home page.

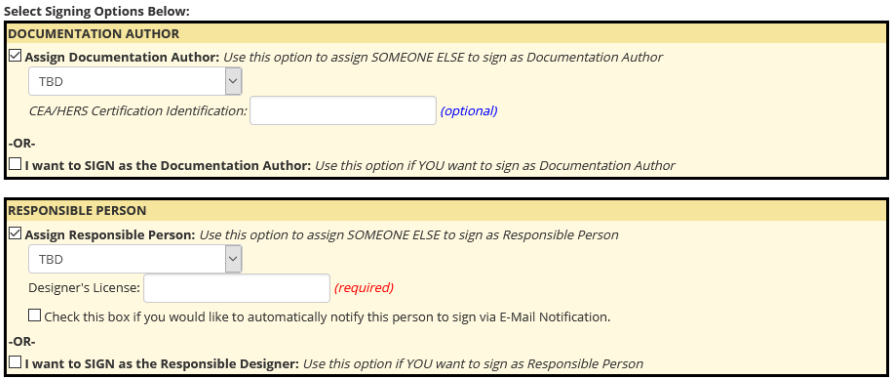
- Click the  icon to **Sign** or **Assign** the **Documentation Author and Responsible Person**.

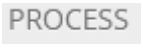


  - **Note**: *You can opt in to receive an **email notification** once the Responsible Person signs the CF1R by checking the box.*

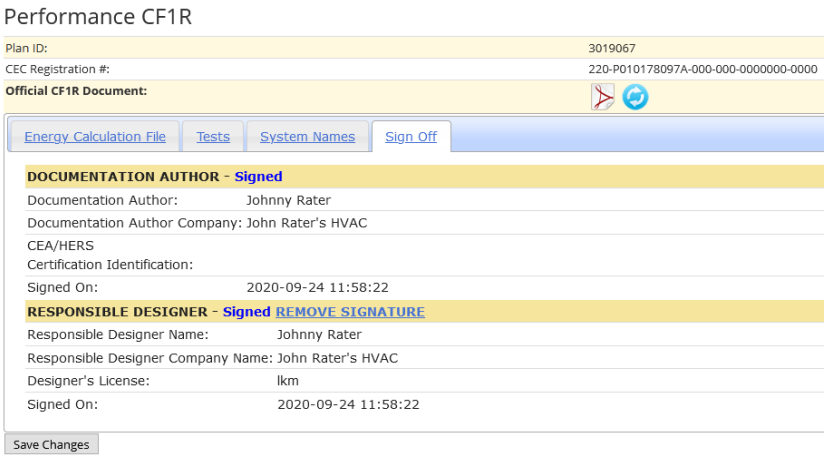


- Input the Designer's License.
  - ***Note:** CEA/HERS Certification Identification is not a required field.*
  - ***Note:** Designer's License is a required field. If they do not have a license number, input NA.*

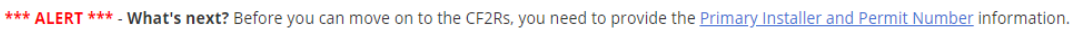


- Click the **Process** link  .

  - ***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.*
  - ***Note**: Once the form has been approved it will display a date and time stamp.*



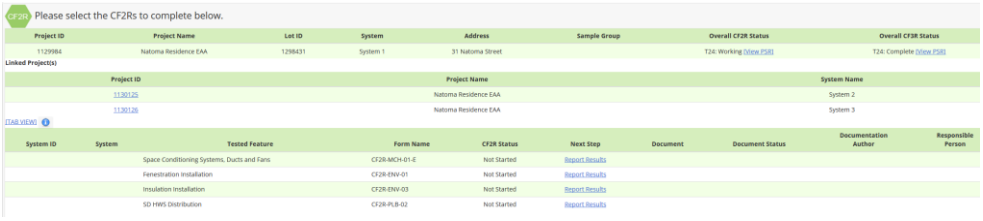
- ***If payment was not already made in previous steps,*** click the **Pay** icon .
    - ***Note:*** *The database will automatically check the box of the current file you are in. If there are several items you can individually Click the check boxes to choose the specific items or Click the check box under Multi-Select to choose all of the items.*
- Click **NEXT** NEXT.
- Follow the prompts in the shopping cart 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 link to return to the page you came from.
    - **Note**: *In order to proceed to the CF2Rs, you must first enter in the* ***Permit Number****.*
- Click ' Primary Installer and Permit Number hyperlink on the top of the screen next to the **What's Next** alert.



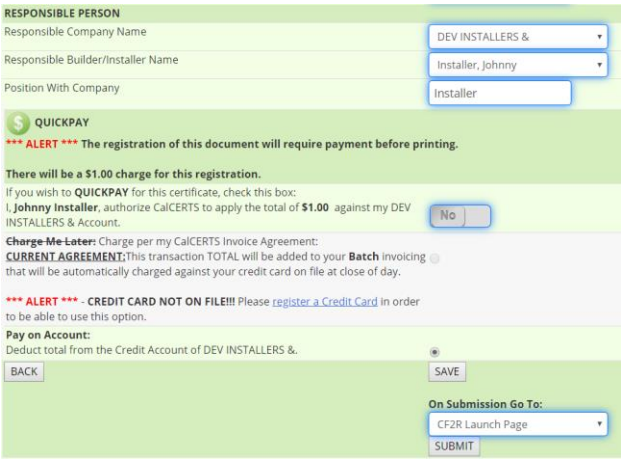
- Input the **Installer CSLB**, **Permit Number**, and **Permit Date**, then Click **SAVE**.

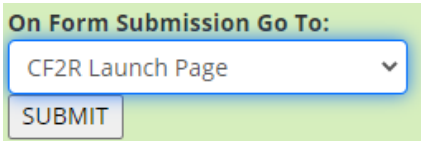
    - ***Note:*** *The Next Step is to complete the required certificates of installation.*
- Click directly on the CF2R link CF2R located at the top of your Project Home page.

- Click the **Report Results** link Report Results for the CF2R-MCH-01-H or the CF2R-ENV forms, if needed.

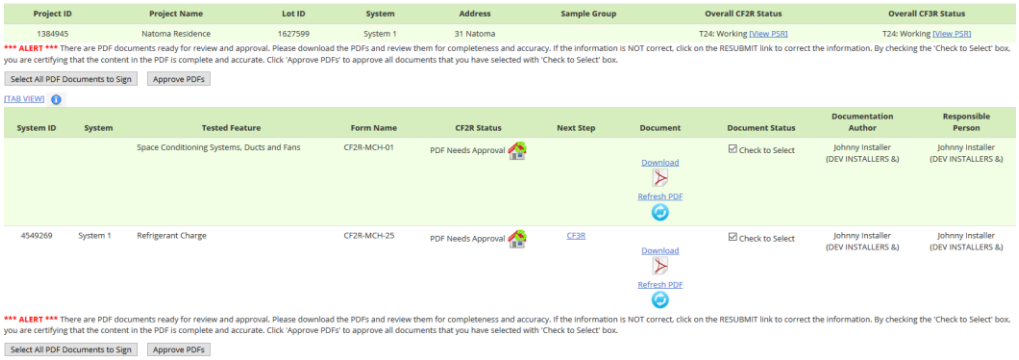


- Input CF2R Results; Click **NEXT** NEXT or **BACK** BACK to navigate through the pages.
- On the final page, Click the drop down to select the **Responsible Builder/Installer Name** and **Company Name** and input the Position With Company.



  - **Note**: *You can select one of the payment options now or wait to pay once the CF2R is certified.*
  - **Note**: *You have the option to **default the landing page** to the CF2R page or automatically go into the next CF2R to be completed.*
  - 

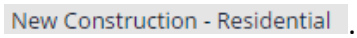
- Click the **Submit** link SUBMIT.
  - ***Note**: You can proceed with inputting the remaining CF2Rs by Clicking **Report Results*** Report Results *located to the right of the CF2R or Approve the current CF2Rs on file by Clicking the **check boxes*** Check to Select *and Clicking **Approve PDFs*** Approve PDFs.
  - ***Note**: Click the **PDF** icon* *to review any documents before approving them.*
- Click the **check boxes** Check to Select to the right of the CF2Rs located under Document Status.



- Click **Approve PDF** Approve PDF.
- Click the **PDF** icons to access the Official Certificate and close once complete.
    - ***Note:*** *Next step is to input the CF3Rs.*
- Click directly on the **CF3R** CF3R icon located at the top of the Project Home page.
- Click the **Report Results** link Report Results located to the right of the CF3R you would like to submit.
- On the final page click the drop down to select the **Responsible Rater Name** and **HERS Company Name** and input the Position with Company.
- Click **SUBMIT** SUBMIT.

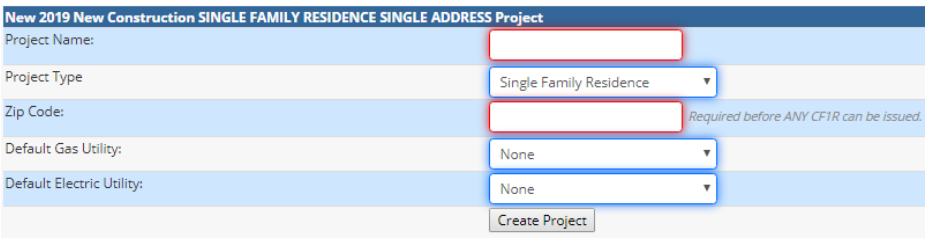
    - ***Note:*** *Next you can input any remaining CF3Rs by Clicking* Report Results.
- Click the **Pay** icon
- Follow the prompts in the shopping cart to proceed with payment.
    - ***Note:*** *Credit Card will typically be the main option but if you have previously placed a credit on your account you 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.

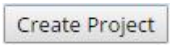
Residential New Construction

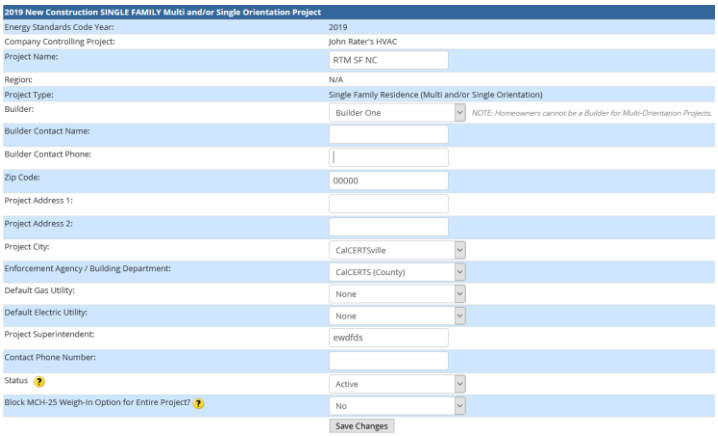
- Click the Projects link located on the left side menu bar.
- Click the **New Construction - Residential** link  .
- Click the green add **New Project** icon .
- Click the green add **New Project** icon located below the Year Standards and to the right of **Single-Family Residence Multi Orientation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

Project Type	Year Standards					
	2005	2008	2013	2016	2019	2022
- Single Family Residence (**SFR**) - MULTIPLE BUILDINGS/DWELLINGS (Subdivision, Planned Neighborhood, etc) *Note - these type of projects ARE NOT FOR HOMEOWNERS. Performance Calculation File ONLY*	+	+	+	+	+	+
- Single Family Residence (**SFR**) - Custom Home - SINGLE BUILDING (Single Address, Single Orientation, Single Lot, etc) *Performance Calculation File or Prescriptive CF1R-NCB-01*	+	+	+	+	+	+
- Single Family Residence (**SFR**) - SINGLE ADDRESS **ADDITION ONLY** *Performance Calculation File or Prescriptive CF1R-ADD-01*	N/A	N/A	+	+	+	+

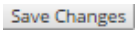
- Input the required information along with selecting the Default Utility:



- Click the **Create Project** link  .
- Input the Project Home information.

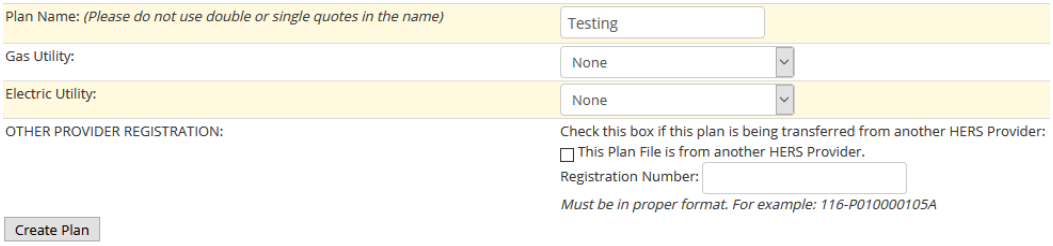


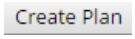
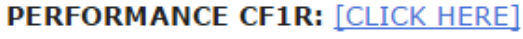
- ***Note**: If you do not see your Builder in the list you can add them by* clicking **My Industry Partners** on the left menu bar, **My Builders/Architects,** then selecting the Builder from the Master List and adding them to your **authorized list**.

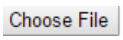
- Click the **Save Changes** link 
.
- Click **OK** to confirm your data has been saved.
    - ***Note**: You cannot move onto the CF2Rs until the Project Home page has been completely filled out and your CF1R has been approved and paid for.*

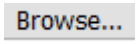
- Click directly on the CF1R

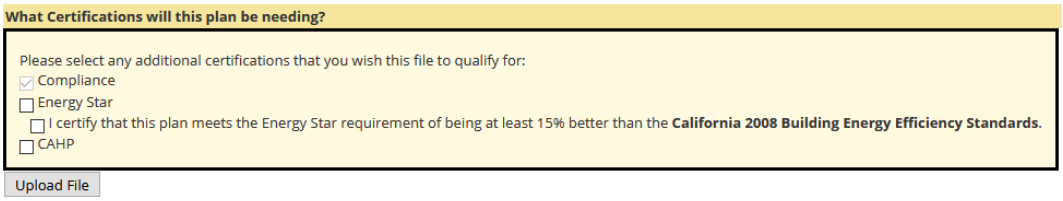
icon located at the top of the Project Home page.
    - ***Note**: Here you will have **two options**: Upload New data file or Transfer Existing file.*
    - **Upload a NEW CF1R.**
        - Click the green add **New Plan** icon.
        - Input a **Plan Name** and Select the **Utility** if applicable.



            - **Note**: ***OTHER PROVIDER REGISTRATION** only applies if the plan is being transferred from another HERS Provider.*
        - Click the **Create Plan** link 
.
        - Click the Performance CF1R: Click Here link. 

in order to upload a new Energy Calculation file.
        - Click the Choose File link 

OR Click 
.
        - Locate the .XML data file you are uploading, then click **Open**.
            - **Note**: *We suggest storing the file in a location that you can easily access such as your desktop or specific folder.*
        - If applicable, check all **Above Code Programs** the file qualifies for.



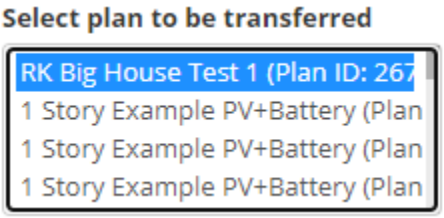
        - Click the Upload File link
.

- **Note**: Each Plan generates its own unique Plan ID number and Registration Number.

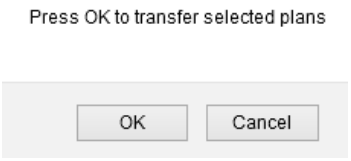
- Click OK to confirm the file has been processed.

- Click the PDF icon to review the CF1R document, then click Fast Sign to sign the CF1R.

- **Transfer an existing plan from your bin to the project.**
  - While in the bin, Click the Transfer Plan from Bin icon located next to the plan.
  - Click to highlight the plan you wish to transfer into the project.
    - **Note**: Hold the Ctrl key on your keyboard and select multiple plans if more than one plan will be uploaded.



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

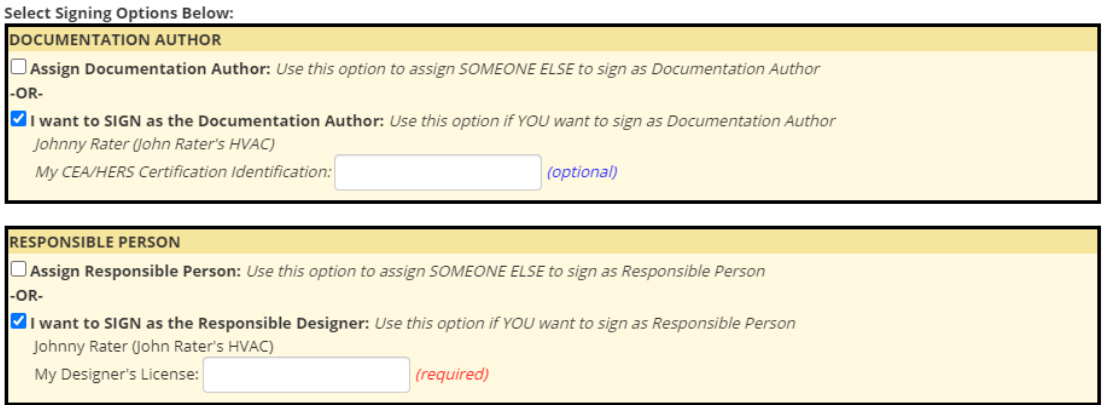


      - **Note**: You can ONLY access Plans within your CF1R Registration BIN that are controlled by your company.

    - Click the **Folder** icon to open the Plan you would like to access.

- Click the PDF icon to review the **DRAFT CF1R Document**.

- Click Fast Sign to **Assign** or **Sign** the CF1R.



- ***Note:*** *Designer's License is a required field. If they do not have a license number input NA.*

- Click PROCESS.

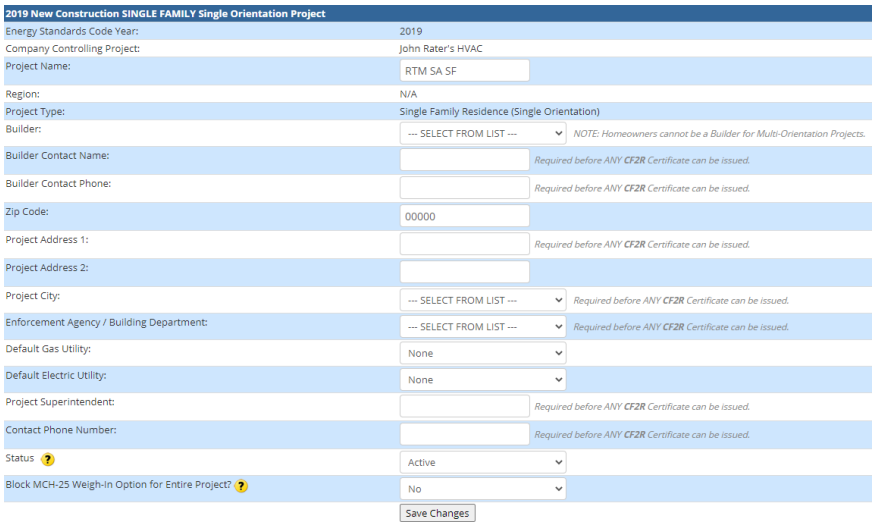
  - ***Note:*** *The Documentation Author and Responsible Designer can be two different users. The Documentation Author must sign off first then the Responsible Designer can sign off after the Documentation Author. If the user is listed as both the Documentation Author and Responsible Designer they can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

  - ***Note***: *2022 Energy Code Standards prohibit HERS Raters from signing as the Responsible Person on the Certificate of Compliance.*

- Click the hyperlink in the alert to identify the Building Department.

  *** ALERT *** - **What's next?** Building Department Needs to be Identified: Identify Building Department

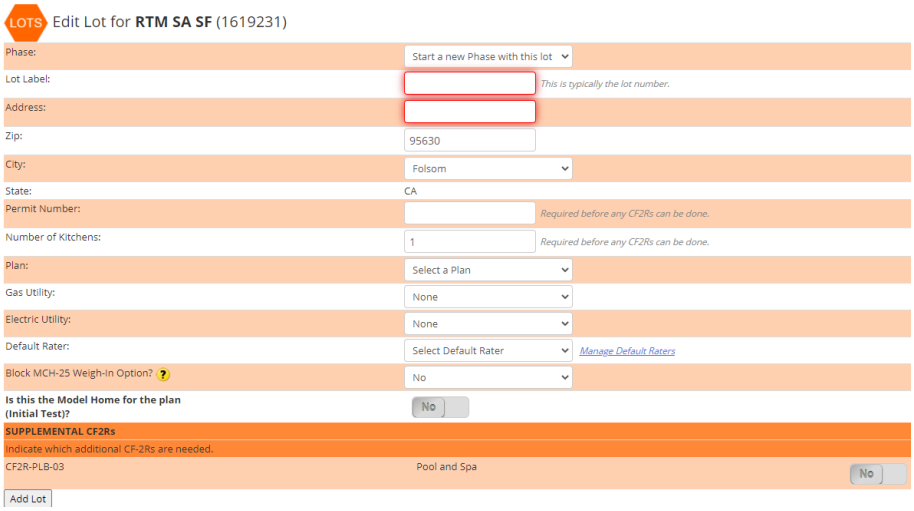
- Input all required project home information.

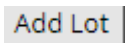


- Click the **Save Changes** link Save Changes

- Click **OK** to confirm your data has been saved.
  - ***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.*
  - ***Note**: If you do not see your Builder in the list you can add them by:*
    - Clicking **My Industry Partners, My Builders/Architects,** then selecting the Builder from the Master List and adding them to your authorized list. Once completed, return to the project.

- Click the Lots icon in the project road map located at the top of your page.
- Click the Folder icon to the right of the address you want to open.
- Click the green add icon to add lots.
- Input all Lot specific information.



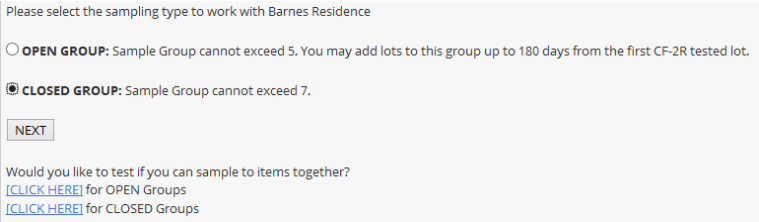
- Click  to save.
  - ***Note**: The **Lot Address**, **Permit Number**, **Permit Date**, and **Plan** are required before moving to the CF2Rs.*
- Click the CF2R icon in the project road map located at the top of your page.
- Click the Folder icon to the right of the lot address you will be completing CF2Rs for.

- Click the **Report Results** link Report Results to the right of the CF2R-MCH-01 for Space Conditioning Systems, Ducts and Fans.
- Input CF2R Results; click **Next** or **Back** to navigate through the pages.

    - **Submitting the Photovoltaic CF2R-PVB-01.**
        - Click Report Results located under Next Step, to the right of CF2R-PVB-01.
        - ***Note**: Photovoltaic is required for New Construction projects effective 2019 Standards forward. The information input into the CF2R-PVB-01 will determine if you need additional photovoltaic forms such as the CF2R-PVB-02.*
- *Once the CF2R-MCH-01 is completed all required test measures 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.
- Click the Pay icon.
- Follow the prompts in the shopping cart 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 icon 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 icon to access the Official Certificate and close once complete.
    - *Next you can Sample if applicable. This is an optional step and only applies to projects needing Sampling.*
- Click the Sample

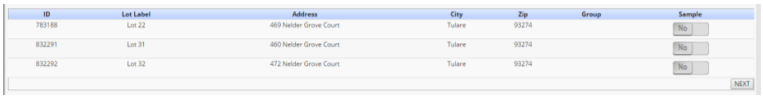
icon in the project road map located at the top of your page.
- *Sample Groups may be Closed or Open when created. Closed groups may include up to seven dwelling units. Open groups may be created with up to five dwelling units.*
    - **Create a Closed Sample Group.**
        - To create a Closed Group, each of the seven dwelling units must have been installed and self-tested by the same contractor, they require the same HERS verifications with one of each plan type inspected and registered as a model, and in the same subdivision or multifamily housing development.

- Click **CLOSED GROUP.**



- Click **NEXT** NEXT.
- ***Note**: The Registry will list all dwelling units as lots available for sampling.*
- Select the **S** 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 No No to Yes Yes in order to select the lots you would like to associate.

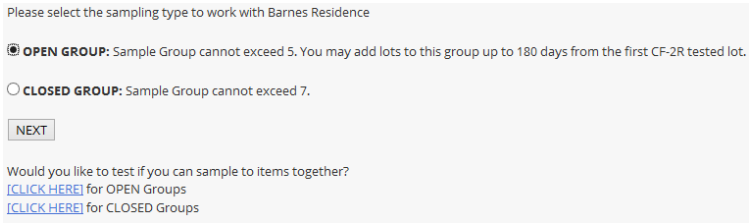


- Click **NEXT** .
- Visually confirm these are the corrects lots and Click **CREATE GROUP**.

- 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-tested by the same contractor, they require the same HERS verifications with one of each plan type inspected and registered as a model, and in the same subdivision or multifamily housing development. Lots may only be added to the Open Group up to 180 days after the signature of the first CF2R registered lot.

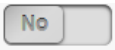
- Select **OPEN GROUP** and Click the **NEXT** link.



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

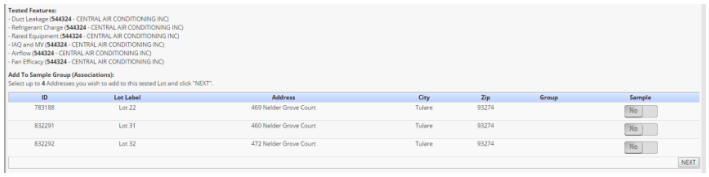
- Select the **S**

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.

- Click the default No 

to Yes

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



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

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

- 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. Do so by clicking the **CF3R**

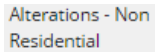
icon located in the project road map at the top of the page.

- After all test information has been entered into any form (Compliance, Installation and Verification) it must be signed before it can be completed.
- After 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.
    - Click the Payment icon in the project road map located at the top of the page.
    - Follow the prompts in the shopping cart 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****.*

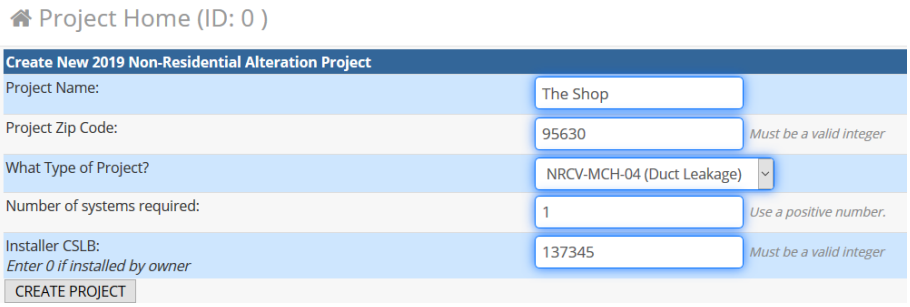
Non-Residential Alterations

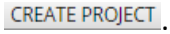
***Note**: There are no CF1Rs or CF2Rs equivalents for Non-Residential projects on CalCERTS. The only forms certified through the registry are the NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, and NRCV-PLB-21. Either the **Installer** or the **HERS Rater** can create the project in the registry,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

- Click Projects

located on the left side menu bar.
- Click **Alterations Non-Residential** 

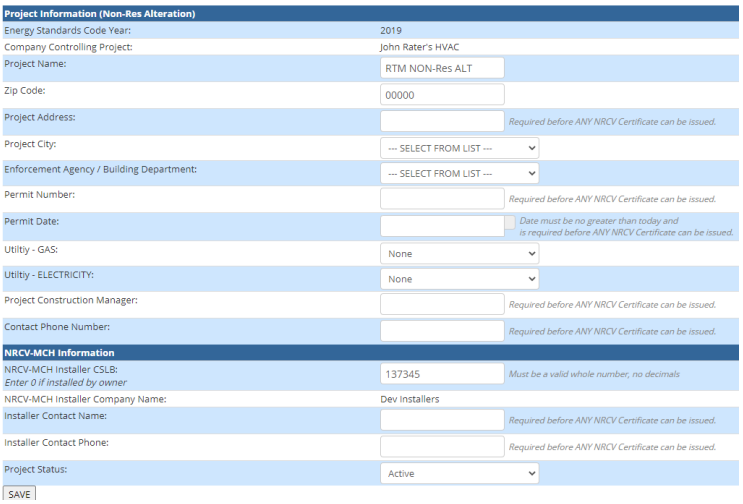
from the dropdown.
- Click the green add **New Project** icon.
- Input the required information such as the Project Name, Zip Code and the Installer CSLB.



- Click Create Project 

.
- Click OK

to confirm your project has been created.
- Input all Required information on the Project Home page such as **Project Address**, **Permit Number**, **Permit Date** and **Installer information**.

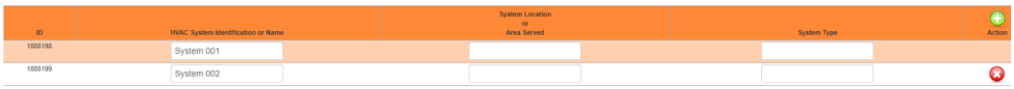


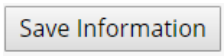
- Click SAVE

.

- Click Systems

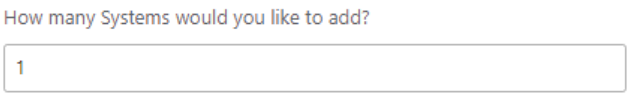
icon in the project road map located at the top of the page.
- Input the required information such as the **HVAC System Identification**, **System Location**, and **System Type**.



- Click Save Information 

- Click green add

icon to **Add Addition Systems**.
- Input how many Systems would you like to add



- Click OK

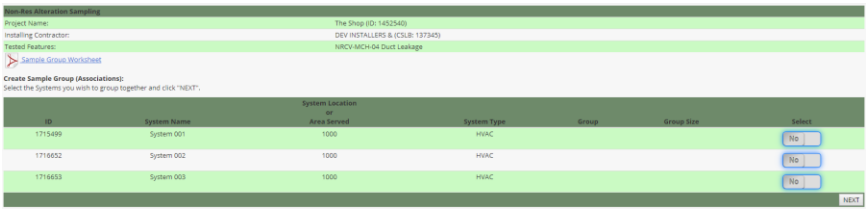
.
    - ***Note**: Here you have two options: **Sampling** or **100% Testing**.*
    - **Sampling** ⟶ Steps to choose Sampling
        - Click Sample

icon in the project road map located at the top of the page.
        - Click the **HVAC Systems** for the group by selecting default No

to Yes

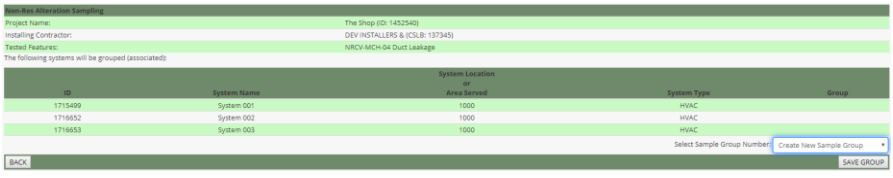
.

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



        - Click **NEXT**

.



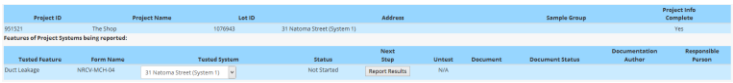
        - Confirm your selected group and Click the SAVE GROUP link

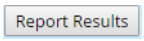
        - Click OK

to confirm your group has been created.

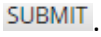
- Click the NRCV

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

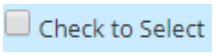


- Click **Report Results** 

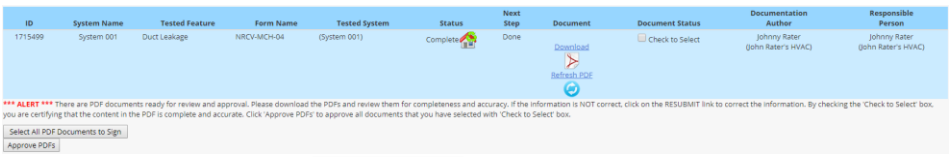
.
- Input results and Click the drop down to select the **Responsible Rater Name** and **Company Name**.

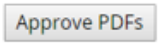
- Click SUBMIT 

.
- Click OK

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

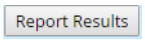
to the right of the NRCV-MCH-04 located under Document Status.

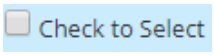


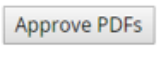
- Click **Approve PDFs** 

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

- **100% Testing** ⟶ Steps to Choose 100% Testing

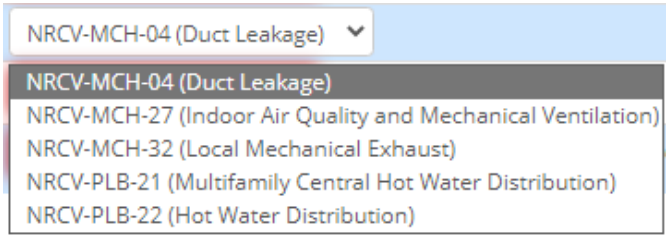
  - Click NRCV icon for Non-Residential Certificates of Verification.
  - Click the Report Results link 
  - Input results and Click the drop down to select the **Responsible Rater Name** and **Company Name.**

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

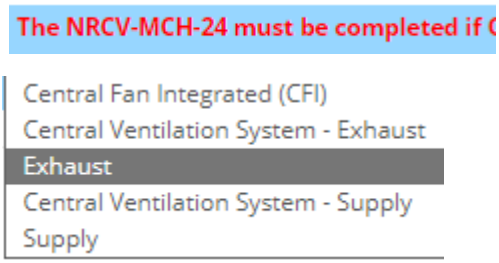
  - Click **Approve PDFs**  .
    - ***Note**: Click the **PDF** icon to access the official registered NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, or NRCV-PLB-21.*

Non-Residential New Construction

CalCERTS supports Non-Residential Verifications forms. The following NRCV forms are certified through the registry NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-21 and NRCV-PLB-22. These forms are listed as the type of project dropdown when creating the project.



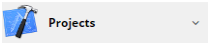
The NRCV-MCH-24 will populate when completing the NRCV-MCH-27 when anything other than a balanced exhaust system is selected.

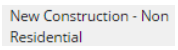


The NRCV-MCH-24 is accessed by clicking the link from inside the NRCV-MCH-27.

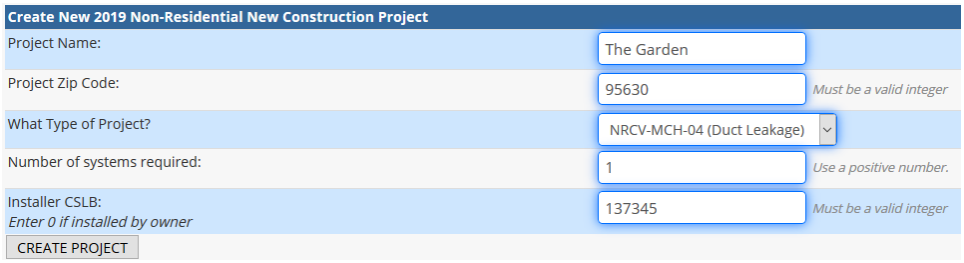
*Either the **Installer** or the **HERS Rater** can create the project in the registry, however the **HERS Rater** must be the **Responsible Person** for any verification forms.*

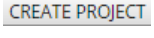
***NOTE**: If the **Installer** creates the project they must transfer the project to the **HERS Rater**.*

- Click Projects 

located on the left side menu bar.
- Click **New Construction – Non-Residential** 

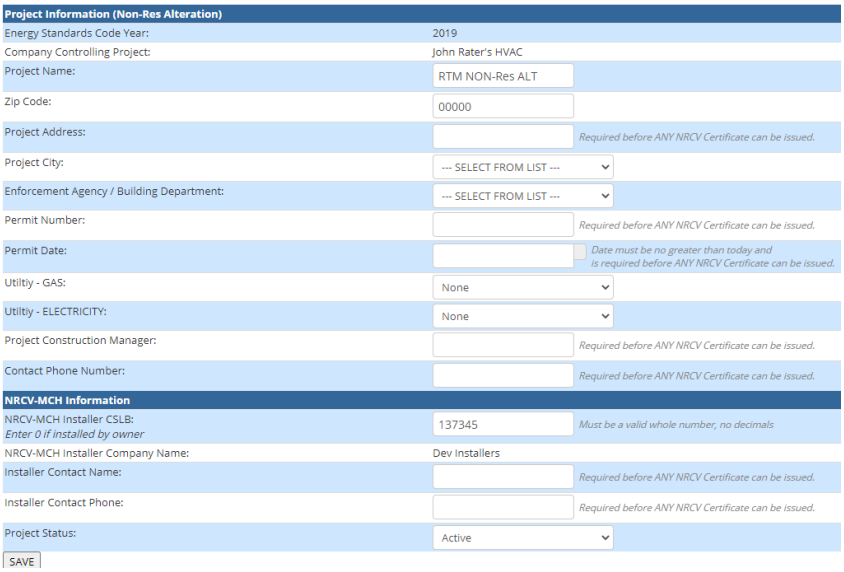
- Click the green add New Project icon.
- Input the required information such as the Project Name, Zip Code, Number of sytems and the Installer CSLB.



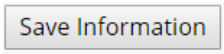
- Click CREATE PROJECT 

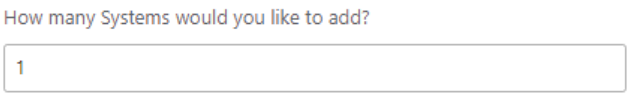
.

- Click **OK** to confirm your project has been created.
- Input all Required information on the Project Home page such as **Project Address**, **Permit Number**, **Permit Date** and **Installer information**.

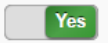


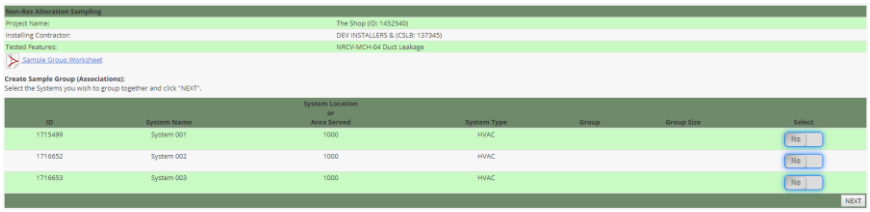
- Click SAVE .
- Click Systems .
- Input the required information such as the **HVAC System Identification, System Location,** and **System Type**.

- Click Save Information  .
- Click the green add icon to add addition Systems.
- Input how many Systems would you like to add

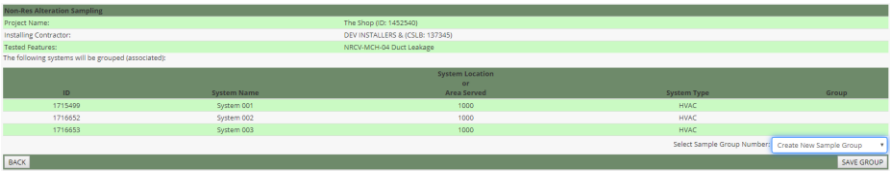


- Click OK .
- Here you have two options: **Sampling** or **100% Testing.**
    - **Sampling** ⟶ Steps to choose Sampling
        - Click the Sampling icon located in the project road map at the top of page.

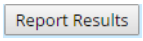
- Click the HVAC Systems for the group by selecting No to Yes 
  - ***Note**: The current project you have open will automatically indicate YES in the Sample column.*



. Click NEXT .



- Confirm your selected group and click SAVE GROUP .
- Click OK to confirm the group has been created.
- Click NRCV icon for Non-Residential Certificates of Verification.
- Click the drop down to select the Tested System.

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

- Click SUBMIT .
- Click OK to confirm your NRCV form has been certified.
- Click the Pay icon.
- Follow the prompts in the shopping cart to proceed with payment.
- Choose the appropriate payment type.

- ***Note**: Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.*

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

  - ***Note**: Click the **PDF** icon to review any documents before approving them.*

  - ***Note**: Users must sign the NRCV form for each project.*

- Click the check boxes Check to Select to the right of the form name located under Document Status.

- Click **Approve PDFs** link Approve PDFs

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

- **100% Testing** ⟶To choose 100% Testing

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

  - Click **SUBMIT** SUBMIT.
  - Click **OK** OK to confirm your NRCV form has been certified.
  - Click the **Pay** icon.
  - Follow the prompts in the shopping cart to proceed with payment.
  - Choose the appropriate payment type.

- ***Note**: Credit Card will typically be the main option but if you have previously placed a credit on your account you will see an additional option to **Pay On Account**.*

- Click the [CLICK HERE] link to return to the page you came from.
  - ***Note**: Click the **PDF** icon to review any documents before approving them.*
  - ***Note**: Users must sign the NRCV form for each project.*
- Click the **check boxes** Check to Select to the right of the form name located under Document Status.

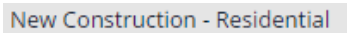
- Click **Approve PDFs** Approve PDFs **.**
  - ***Note**: Click the **PDF** icon to access the official registered NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, or NRCV-PLB-21.*

Multi-Family Project

At the time of this publishing, CalCERTS 2022 Multi-Family registry programming is in progress. Once complete, CalCERTS 2022 Multi-Family registry will reflect the updated energy codes that include Low-Rise New Construction and Low-Rise Alteration.

The following directions are applicable to energy code projects prior to 2022 code cycle.

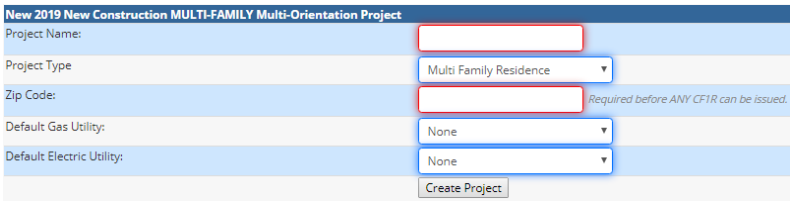
- Click Projects

from the menu on the left.
- Click **New Construction - Residential** 

from dropdown menu.
- Click the green add New Project icon.
- Click the green add New Project icon located below the Year Standards and to the right of **Multi-Family Residence (MFR)** for Project Type.

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

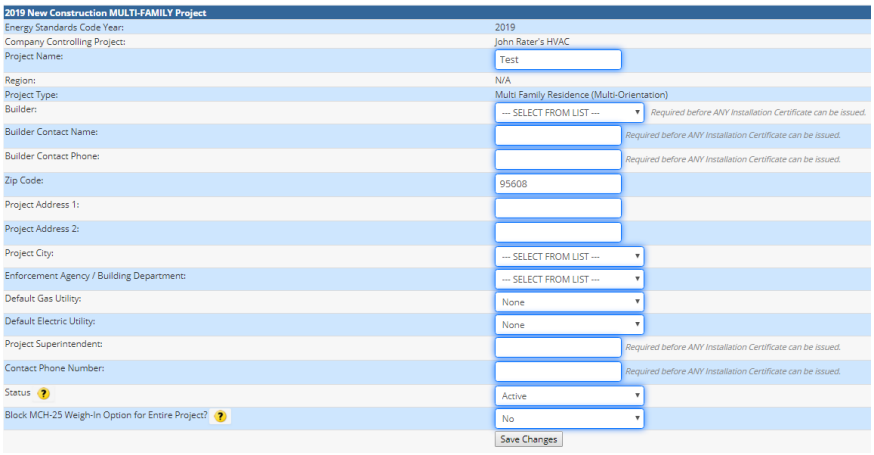
- Input all project specific information.



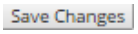
- Click CREATE PROJECT

- 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.*
- ***Note**: If you do not see your Builder in the list you can add them by:*
  - Clicking **My Industry Partners, My Builders/Architects,** then selecting the Builder from the Master List and adding them to your authorized list. Once completed, return to the project.

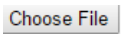
- Click the Save Changes link 

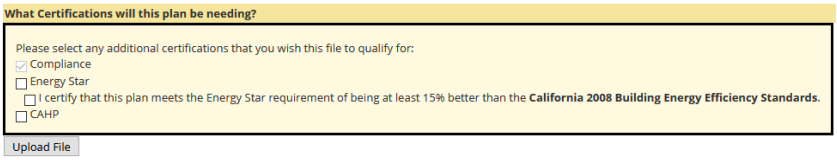
- Click OK

to confirm your data has been saved.
- Click the CF1R

icon located in the project road map at the top of the page.
- *Here there are two options: **Upload New or Transfer Existing***
  - **Upload a NEW CF1R**
    - Click the green add New Plan icon.
    - Input a Plan Name
    - Select Utility

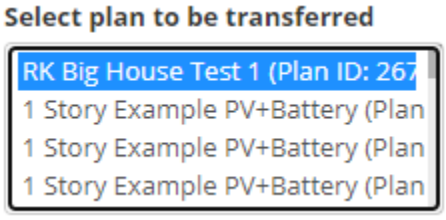
- ***Note**: **OTHER PROVIDER REGISTRATION** only applies if the plan is being transferred from another HERS Provider.*

- Click Create Plan .
- Click OK to confirm the plan has been created.
- Click the PERFORMANCE CF1R: [CLICK HERE] hyperlink in the **Energy Calculation File** tab in order to upload a new Energy Calculation file.
- Click Choose File  OR Click Browse... .
- Locate the .XML data file you are uploading, then click **Open**.
    - **Note**: *We suggest storing the file in a location that you can easily access such as your desktop or specific folder.*
- If applicable, check all **Above Code Programs** the file qualifies for.

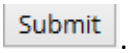


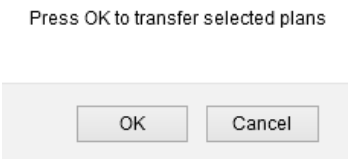
-
- Click the Upload File link .
    - **Note**: Each Plan generates its own unique Plan ID number and Registration Number.
- Click OK to confirm the file has been processed.
- Click the PDF icon to review the CF1R document, then click to **Sign** or **Assign** the CF1R signature.

- **Transfer an existing plan from your bin to the project**
- While in the bin, Click the Transfer Plan from Bin icon located next to the plan.
    - Click to highlight the plan you wish to transfer into the project.

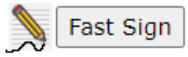


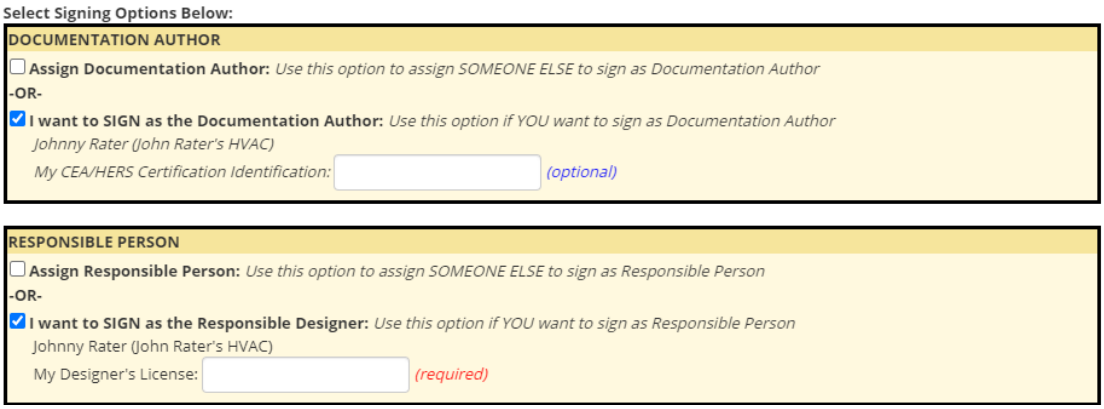
- ***Note**: Hold the Ctrl key on your keyboard and select multiple plans if more than one plan will be uploaded.*

    - Click SUBMIT  .
    - Click **OK** to transfer selected plans.



- ***Note**: You can ONLY access Plans within your CF1R Registration BIN that are controlled by your company.*

- Click the Folder icon to open the Plan you would like to access.
- Click PDF icon to review the **DRAFT CF1R Document**.
- Click  to **Assign** or **Sign** the CF1R.

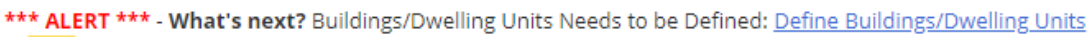


  - ***Note:** Designer's License is a required field. If they do not have a license number input NA.*

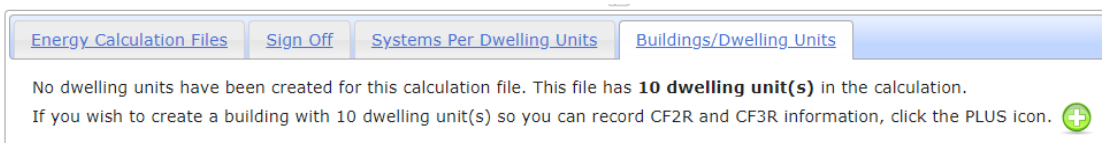
- Click .

  - ***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.*

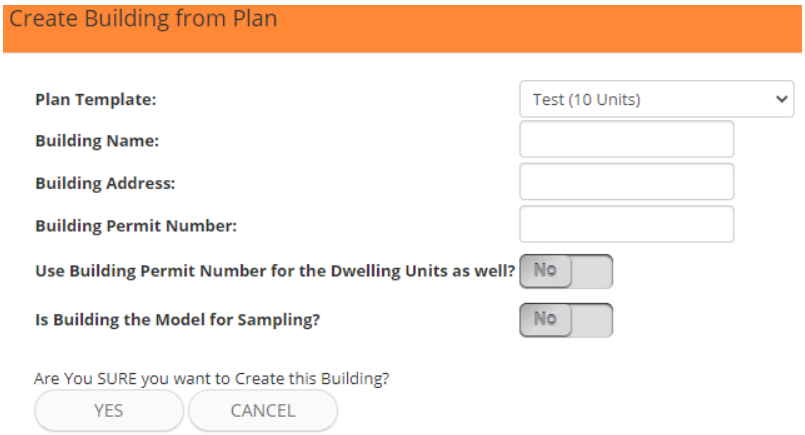
- Click the **Building/Dwelling Unit**s hyperlink at the top of the screen to define the dwelling units.



- Click the green add icon to create a building for the units modeled in the calculation file.



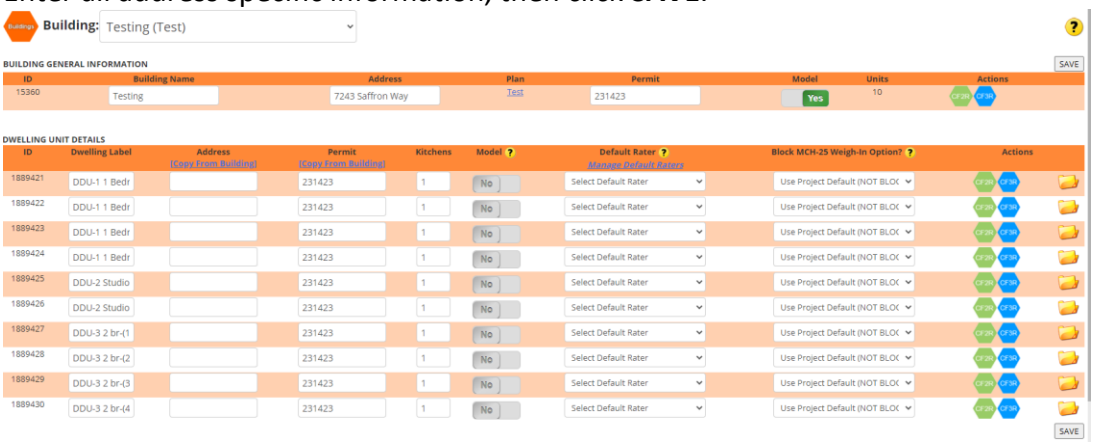
- Enter in the building specific information, then click **YES** to create the building.



***Note**: To create additional buildings from this plan, click the green add* *icon under the Building/Dwelling Units tab.*

- Click the **Building**

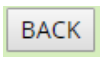
icon to begin identifying the addresses within the building.
- Enter all address specific information, then click **SAVE**.

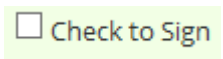


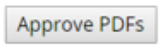
- Click the CF2R

icon located in the project road map at the top of the page to begin the CF2R data entry.
- 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 page
- *Once the CF2R-MCH-01 is completed all required test measures will populate*.
- Click the **Check Box to Sign** 

next to all documents you want to approve
- Click **Approve PDFs** link 

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

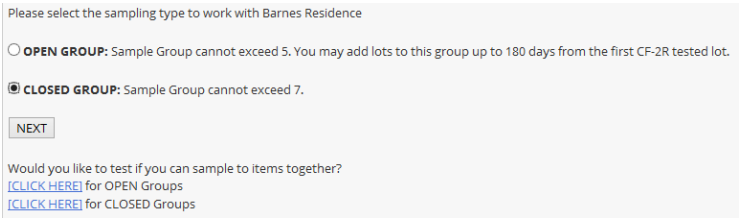
- Click the Sample

icon.

- *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, they require the same HERS verifications with one of each plan type inspected and registered as a model, and in the same subdivision or multifamily housing development.
    - Click **CLOSED GROUP**



    - Click the **NEXT** link

    - *The Registry will list all dwelling units as lots available for sampling.*
    - Select the **S** icon

located to the right of the lot you would like to add to the group. The current project you have open will automatically indicate **Yes** in the Sample column.

    - Click the default

to

in order to select the lots you would like to associate.

    - Click the **NEXT** link

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

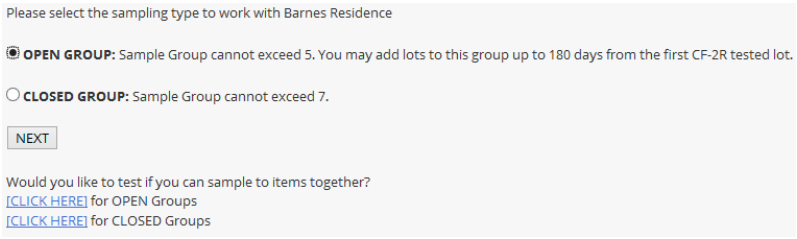
- Click **OK**

to confirm group has been created.

- Once the desired group has been crested, click the CF3R

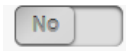
icon located in the project road map at the top of the page to complete the CF3R forms used by the Rater for HERS Verification.

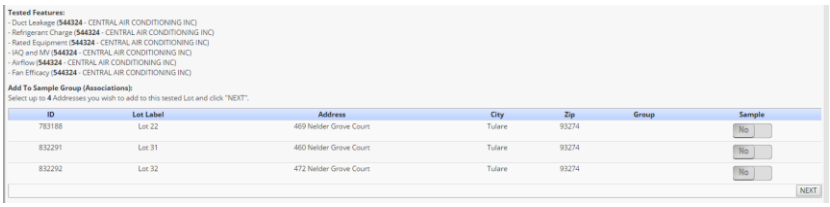
- After all test information has been entered, it must be signed before it can be completed. To review and sign multiple forms at once, use the Mass Signing Page for the selected form.
    - *Complete directions on how to sign Multiple forms is located in the Signing Forms section of this manual.*
- **Create an Open Sample Group**
    - To create the Open Group, each of the dwelling units must have been installed and self-tested by the same contractor, they require the same HERS verifications with one of each plan type inspected and registered as a model, and in the same subdivision or multifamily housing development. Lots may only 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.



    - *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.

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



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

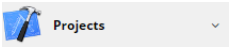
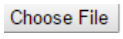
- Click **OK** to confirm the group has been created.

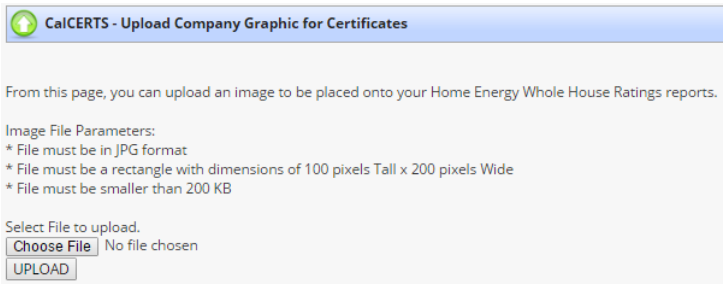
- Once the desired group has been crested, click the CF3R icon located in the project road map at the top of the page to complete the CF3R forms used by the Rater for HERS Verification.

- After all test information has been entered, 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.

Energy Home Ratings

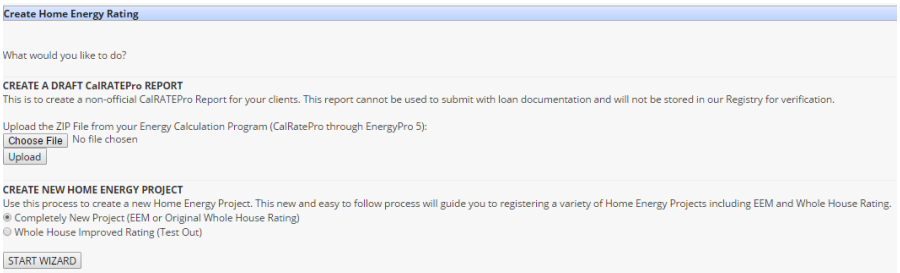
This walk through applies to both New Construction and Existing Homes.

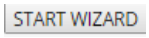
- Click the **Projects** link  located on the left side menu bar.
- Click the **Home Energy Ratings** link
- ***Here you have an additional option*** *before you create your project.*
    - Upload Company Graphic to be placed onto your Home Energy Whole House Rating Reports:
    - Click the **Upload 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 are using.*

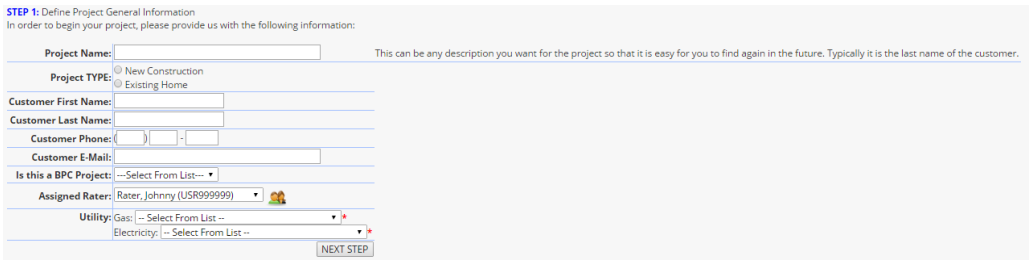


    - Click **UPLOAD**
    - Click the **Back** link

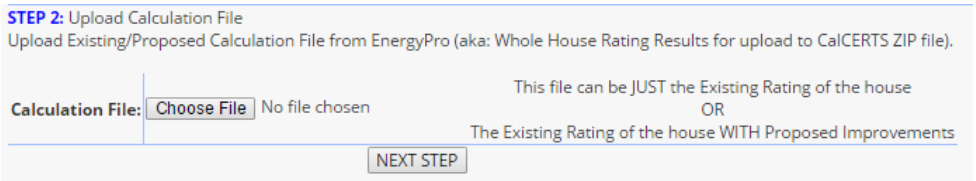
- Click the **Home Energy Rating Project** icon
- Click the option for **Completely New Project (EEM or Original Whole House Rating)**



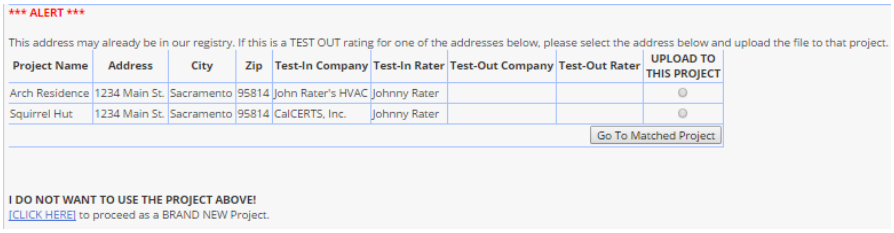
- Click **START WIZARD** 
- Input the required project information



- Click **NEXT STEP** NEXT STEP
- Click the **Choose File** link Choose File OR Click the **Browse** link Browse...
- *The option of **Choose File** or **Browse** will depend on what browser you are using.*

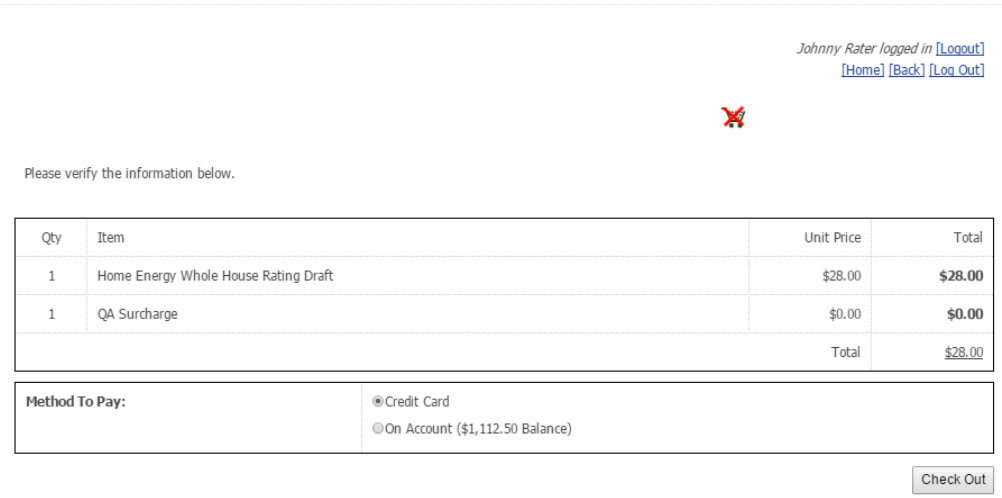


- Click **NEXT STEP** NEXT STEP
- *If the address is already registered in our database an Alert will prompt. **Here you have two options:***
    - Select the existing address and Click **Go to Matched Project** Go To Matched Project
    - ***OR***
    - Click the [CLICK HERE] link to proceed as a Brand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

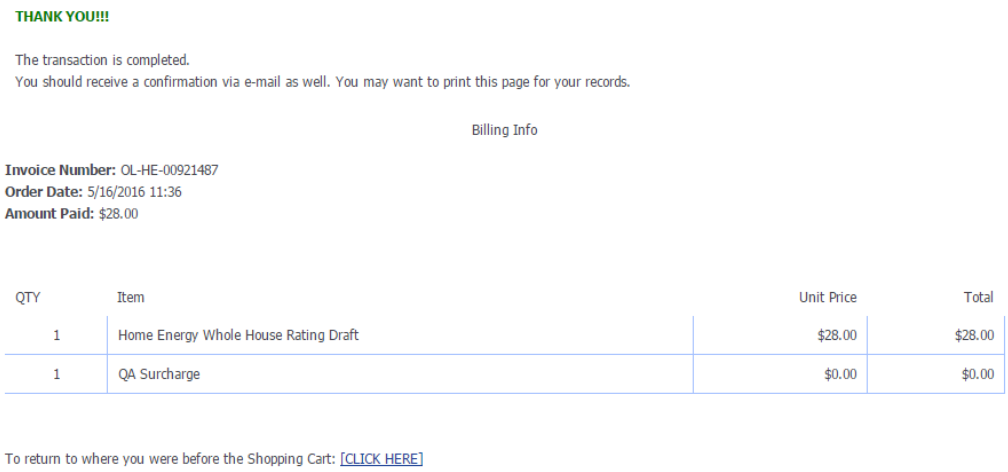


- *This example is for a Brand New Project.*
- Click **Whole House Rating Report**.

- *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.***

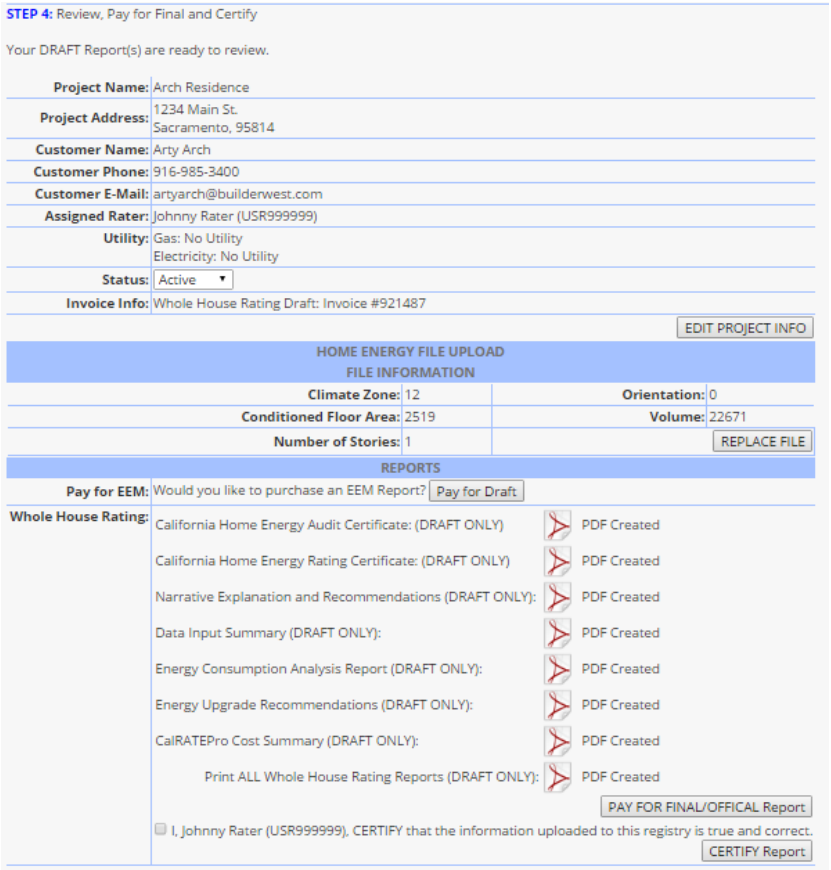


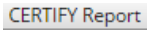
- Click **Check Out**
- Follow the prompts in the shopping cart to proceed with payment.

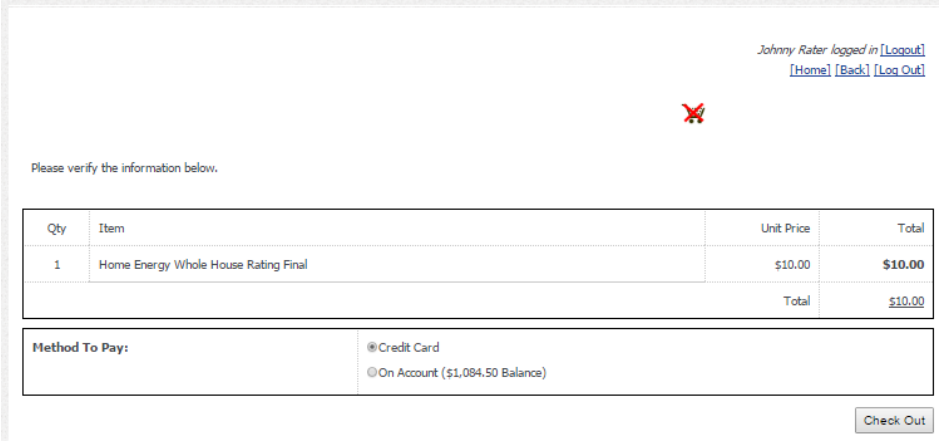


- Click the [CLICK HERE] link to return to the page you came from.
- You have the option to **Edit Project Info** EDIT PROJECT INFO or **Replace File** REPLACE FILE

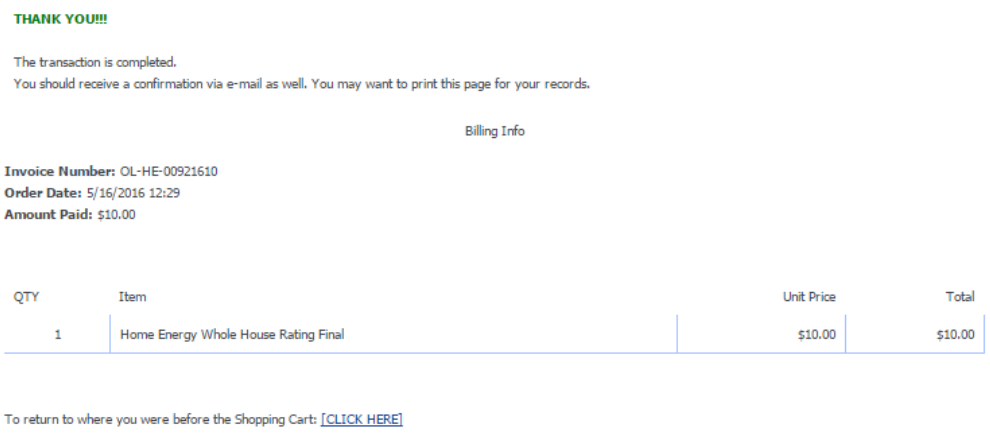
- You can Click the **PDF** icon(s) to access the DRAFT ONLY versions for review.



- Click the **Check Box** to agree and CERTIFY that the information uploaded to this registry is true and correct.
- Click **CERTIFY Report** 
- Click **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****.*



- 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.

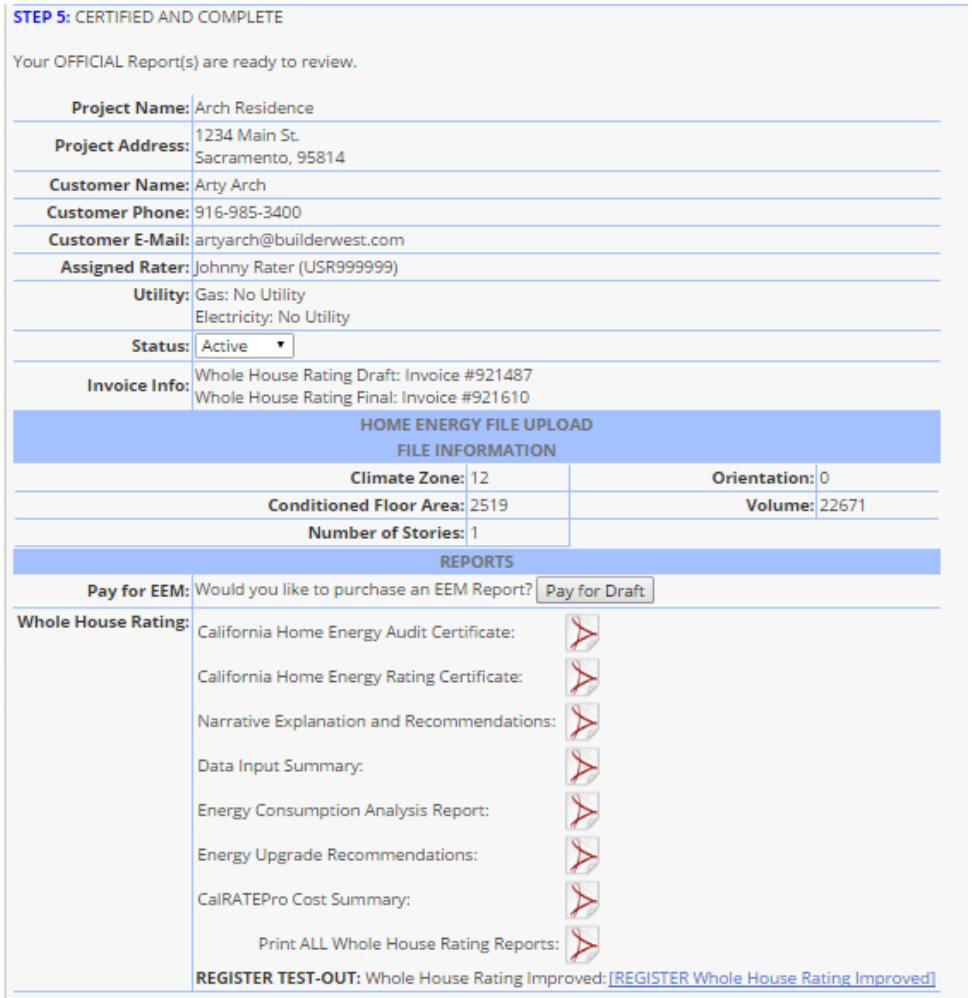
Billing Info

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		

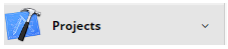
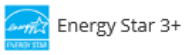
REPORTS

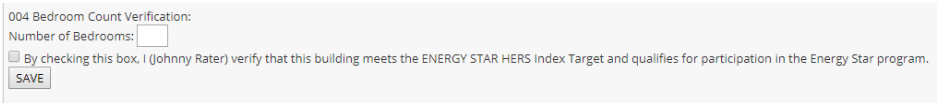
Pay for EEM:	Would you like to purchase an EEM Report? Pay for Draft
Whole House Rating:	California Home Energy Audit Certificate: California Home Energy Rating Certificate: Narrative Explanation and Recommendations: Data Input Summary: Energy Consumption Analysis Report: Energy Upgrade Recommendations: 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.

Energy Start 3+

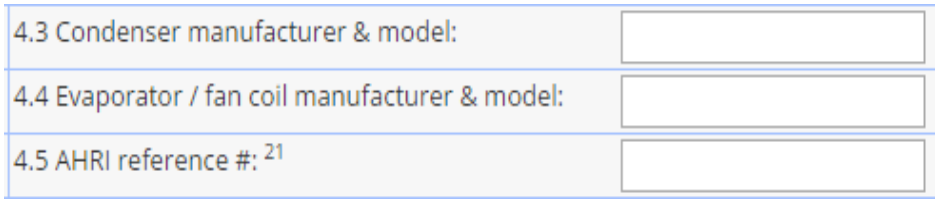
Energy Star 3/3.1/3.2 only applies to New Construction Residential Projects

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

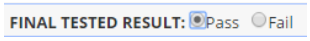


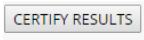
- Click the **Report Results** icon .
- Select the appropriate **Energy Star Version** from the drop-down.

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

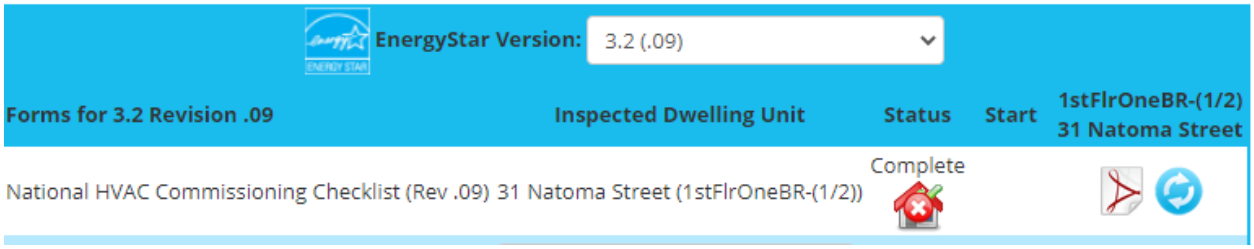


- Select the **Responsible Rater Name** and **Rating Company** from the drop-down.

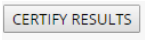
- Select whether or not it passed or failed. 

- Click **CERTIFY RESULTS** 

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



- Click **NEXT**

under Energy Star FINAL Certificate for Revision 3+.
- As with the previous forms, fill out the information and click **CERTIFY RESULTS** 

to submit.
- Click

to confirm the submission
- Click Pay icon to pay for the certificate.
- Select

and follow the steps for the payment option designated
- Once the payment is completed, click the

hyperlink to return to the page you came from
- Click on the **PDF** icon for Energy Star Certificate in order to download.

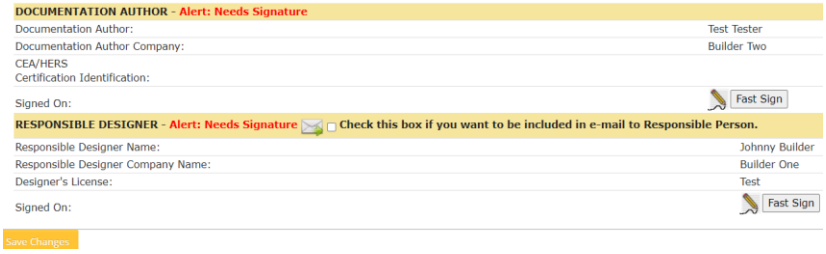
Completing Projects

CF1R Signature Notifications

- Within the CF1R Registration Bin
  - Click **CF-1R Registration**
  - Select the year code for the bin you would like to access. This feature only applies to the 2013, 2016, 2019 or 2022 Standards.
  - Open the CF1R you would like to access by clicking the Folder icon.
  - Assign the Documentation Author, Responsible Designer & Designer's License, and
  - Click **Save Changes** .

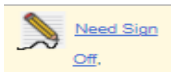
***Note**: If you are listed as the Documentation Author, you will need to sign before moving onto the next step.*

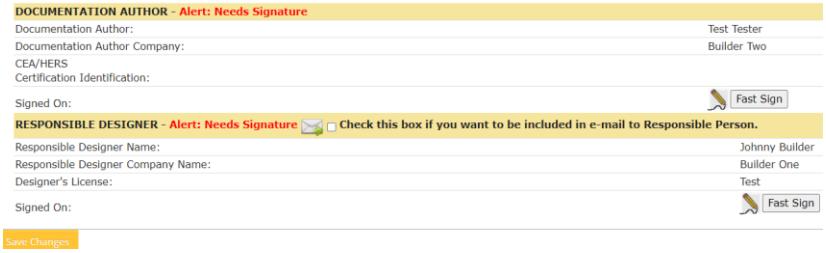
  - Click email icon to email the Responsible Person.



Note: 2022 Energy Code Standards prohibit HERS Raters from signing as the Responsible Person on the Certificate of Compliance.

  - 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.

- Within a Project
  - Log in and navigate to the **New Construction Residential** project, then
  - Click CF1R icon located in the project road map at the top of the page.
  - Open the CF1R you would like to access by clicking the Folder icon, or clicking the Need Sign Off  hyperlink.
  - Assign the Documentation Author, Responsible Designer & Designer's License.
  - Click **Save Changes** .
    - *If you are listed as the Documentation Author, you will need to sign first before moving onto the next step.*
  - Click email icon to email the Responsible Person.



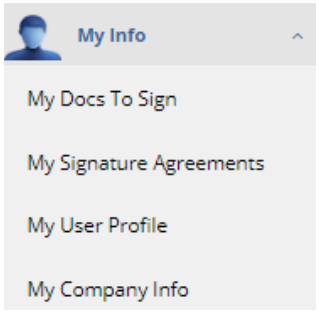
  - Click **OK** to confirm you would like to send the notification.
  - Once the email has been sent the confirmation of who requested the notification will be displayed.

Signing Documents

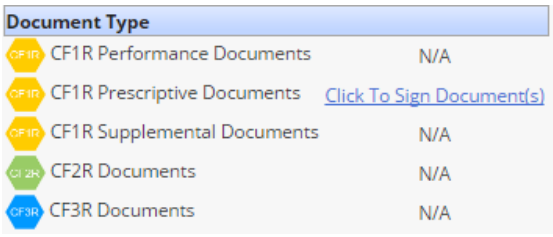
- All forms must be signed by the **Documentation Author** and then the **Responsible Person** before they become final and ready for payment.
- Once all required information is entered into a form and reviewed the document is ready to be signed.
- Users may sign forms individually or may use the **My Docs to Sign** page to sign groups of documents.

  - To sign a **Single** form such as CF2R or CF3R, navigate to the desired page.
    - Open the forms list by clicking the Folder icon of the desired lot.
    - Select the PDF icon to review the unofficial document before approval.
    - Click the Check to Selct Check to Select box to the right of the form name located under Document Status.
    - Click Approve PDF Approve PDF to apply signature.

  - To sign **Multiple** forms at once use the **My Docs to Sign** page by:
    - Click **My Info** from the menu on the left and select **My Docs to Sign** from the dropdown.



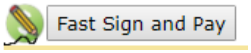
    - The list of unsigned documents, categorized by type, will load.



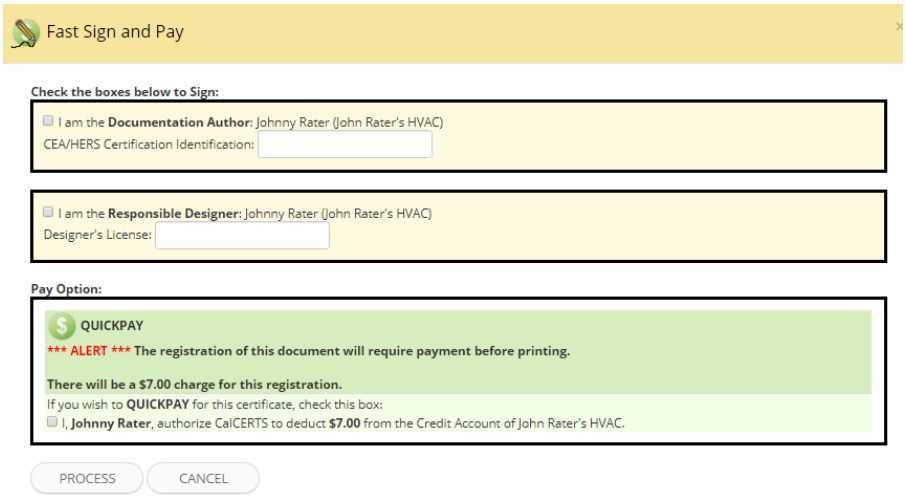
    - Select **Click To Sign Document(s)** Click To Sign Document(s).
      - ***Note**: The **Click To Sign Documents** will only appear if there are documents to sign for that document type.*
    - Click the PDF icon to review the unofficial document before approval.

- Check all of the boxes for the forms you would like to approve.
- Select **Approve PDF** Approve PDF.

Payment

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

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



- To pay for forms from the Project Roadmap, select the Payment icon to submit payment for selected forms.
- Follow the prompts in the shopping cart to proceed with payment.
    - ***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.

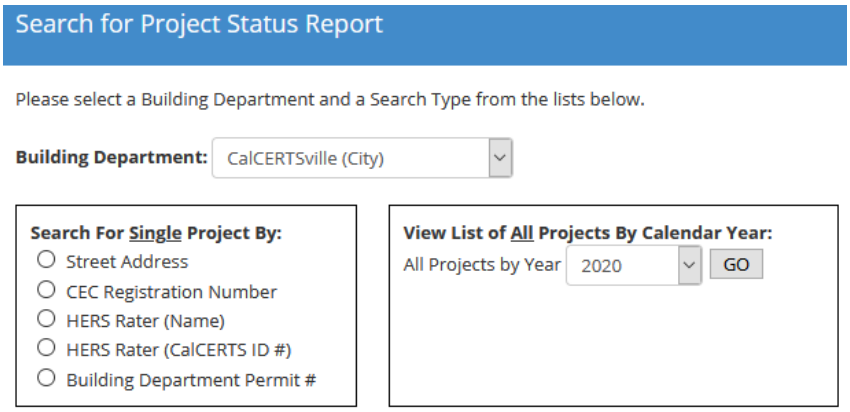
QR Code

Green = Complete

Red = Incomplete

- **PSR Access for Building Officials:**
  - To access the PSR, Building Departments must be registered with CalCERTS.
  - To create an account, reference the User Registration section of this manual and select "I am a Building Department/Enforcement Agency Personnel for a City or County."

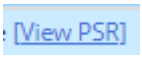
- Next, the Building Official should login into the Registry. Once in the Registry, the project lookup page will automatically load.

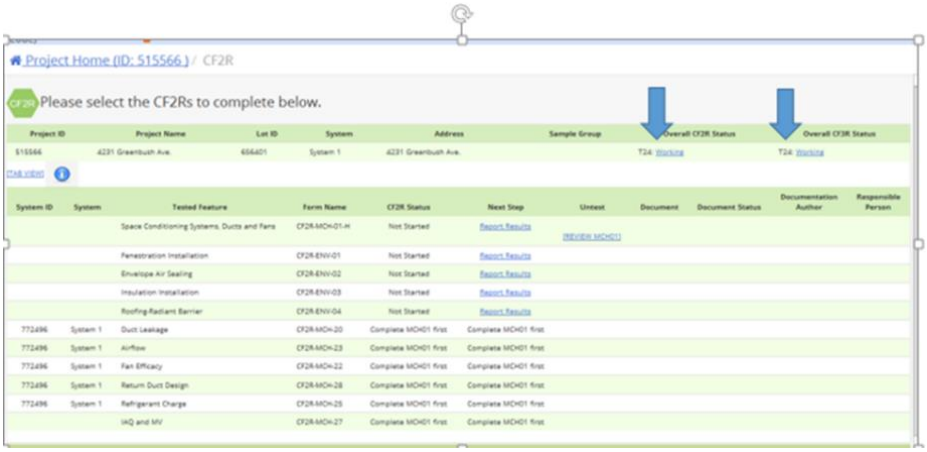


- The Building Official may search for projects in their jurisdiction using with project specific information or view a list of projects by calendar year.

- Once a project is selected, the **PSR** page will automatically display.

- If the project is outside of your jurisdiction, you have the option to click the email icon next to the project address to request access.

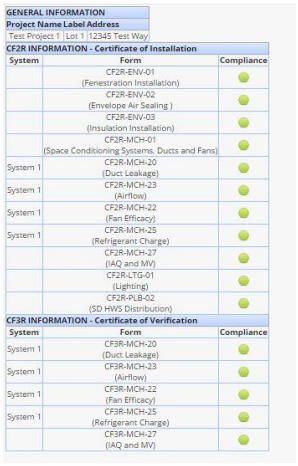
- **PSR Access:**
  - Log in and navigate to the project, then
  - Click either the CF2R OR the CF3R icon located in the project road map at the top of the page.
  - Locate the lot and click the Folder icon, then
  - Click the View PSR  hyperlink. Status will be either **Working** OR **Complete** (depending on the status) located under Overall CF2R Status OR Overall CF3R Status as shown below. Either link will take you to the **PSR**:



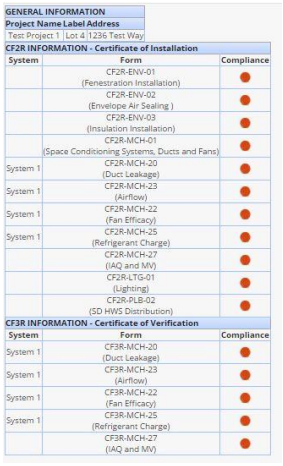
    - ***Note**: Here you will see a quick view of the report.*
  - Click the **PSR** icon located in the upper left corner to download the **PSR**.

- **Quick Status Report (QSR)**

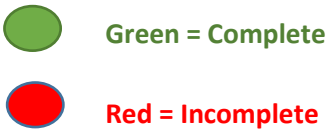
  - *The Quick Status Report (QSR) was created in response to our Registry users who want to quickly check the overall status of new construction projects. The QSR provides a snapshot of the project and summarizes which forms and/or measures are still needed to ensure compliance. Viewing the QSR does not 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 (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)	

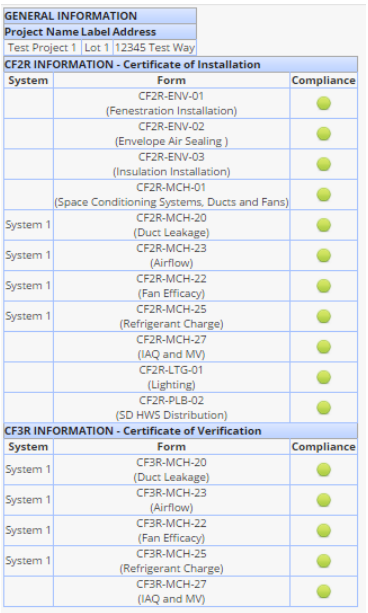


GENERAL INFORMATION		
Project Name Label Address		
Test Project 1 | Lot 4 | 1236 Test Way		
CF2R INFORMATION - Certificate of Installation		
System	**Form**	**Compliance**
	CF2R-ENV-01 (Fenestration Installation)	
	CF2R-ENV-02 (Envelope Air Sealing)	
	CF2R-ENV-03 (Insulation Installation)	
	CF2R-MCH-01 (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)	



- To access the **QSR**:

  - Log in and navigate to the project, then
  - Click either the CF2R OR the CF3R icon located in the project road map at the top of the page.
  - Locate the lot and click the Folder icon, then
  - Click the Quick Status icon to 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 - Support@calcerts.com

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

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

Compliance Questions – Support@calcerts.com

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

Training Questions – Training@calcerts.com

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

Quality Assurance Questions – QA@calcerts.com

The *CalCERTS Quality Assurance Team* is available by phone and email to answer questions related to quality assurance field reviews of CalCERTS Certified Raters. To reach our QA Team email QA@calcerts.com or call (916) 805-5235.

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.