

**DOCKETED**

<b>Docket Number:</b>	13-ATTCP-01
<b>Project Title:</b>	Acceptance and Training Certification
<b>TN #:</b>	266071
<b>Document Title:</b>	CALCTP AT Summary of Changes
<b>Description:</b>	Summary of changes made to CALCTP AT Handbook 2025
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<b>Organization:</b>	CALCTP
<b>Submitter Role:</b>	Applicant
<b>Submission Date:</b>	9/18/2025 3:18:59 PM
<b>Docketed Date:</b>	9/18/2025

## 2025 CALCTP AT Handbook - Summary of Updates

All pages:

- *Update* to code version and date in footer.

Pg 1:

- *Update in footer:* Removal of footer references to past standards
- *Update:* Change third-party reference from ICF to CalEnergy Corp.

Pg. 3:

- *Add text to include further details on the application process:* The application process begins when a qualified individual pays the application and records maintenance fee, submits an application, and supporting documentation to CALCTP. After CALCTP approval, the candidate will receive admission papers to enroll in the in-person CALCTP-AT Technician course.
- *Add text to include updated submission requirements and submittal process:* Pay the application and records maintenance fee (non-refundable). A completed application form. Supporting documentation for review and approval.
- *Add text to include recertification training requirement deadline and reinstatement fee for suspended ATTs:* A CALCTP-AT technician must complete the recertification training requirement by the first day of a new code cycle, or the technicians account will be suspended. A reinstatement fee of \$100.00 to \$150.00 will be required, and all recertification requirements must be fulfilled before reactivation. If a CALCTP-AT technician remains inactive for a full code cycle or more, the technician will be required to reapply, retake the in person CALCTP-AT training course, and pay all associated fees.

Pg. 4:

- *Update:* Under 1<sup>st</sup> paragraph removed ICF and replaced with CalEnergy Corp.

### **Summary of CALCTP-AT Program Changes**

CalEnergy Corporation has officially assumed administration of the CALCTP Acceptance Testing (CALCTP-AT) program from ICF. Going forward, CalEnergy Corp. will oversee all program management, certification, renewals, compliance reviews, and administrative functions.

#### **Key Updates:**

- **User Experience:** The forward-facing user experience for Acceptance Testing submissions will remain unchanged through the CALCTP website, ensuring continuity for ATTs and employers.
- **System Enhancements:** Minor adjustments will be made to the website's back-end functionality to support more comprehensive data collection and reporting to the California Energy Commission (CEC).
- **Compliance Oversight:** On-site and paper review audit rates will be increased to strengthen compliance efforts and, in turn, support California's energy efficiency goals.

- **Applications & Renewals:** Application and renewal fees will be adjusted to account for inflation and ongoing administrative maintenance costs.
- **Program Requirements:** Language around the responsibilities of Responsible Persons (RPs) and the required ratio of RPs to Acceptance Test Technicians (ATTs) has been refined to ensure proper employer oversight of field technicians.

These changes are designed to improve program accountability, enhance compliance, and ensure long-term sustainability of the CALCTP-AT program while supporting California's energy efficiency objectives.

- *Added text under Submission requirements (4) to strike ICF and add CalEnergy Corp.: Audit Agreement with third-party quality assurance auditor, ~~ICF~~ CalEnergy Corp.*

Pg. 5

- *Added new text under Essential Elements (e): Accredited companies must only assign the role of responsible person to individuals who hold a position that is mid-or-senior level management and completed the CALCTP-AT employer, or technician course.*
- *Added new text under Essential Elements (f): Accredited companies must maintain a ratio of no more than four (4) Acceptance Test Technicians (ATTs) per Responsible Person (RP). If the RP is also an active ATT, they are counted as one of the four ATTs. An office must meet this RP-to-ATT ratio before becoming eligible to add an additional RP.*
- *Added new text under Essential Elements (g): Accredited companies must assign an RP to each office employing ATT's and maintain the RP-to-ATT ratio.*
- *Update, under Essential Elements (h): Accredited companies must pay all audit invoices within 30 days of issuance.*
- *Added new text under Essential Elements (j): A CALCTP-AT employer must complete recertification training by the first day of each new code cycle. Failure to do so will result in suspension of the employer's account. A reinstatement fee of \$200 to \$300 will apply, and all recertification requirements must be satisfied before reactivation. Employers inactive for a full code cycle or longer must reapply, retake the CALCTP-AT employer training course, and pay all associated fees.*

Pg. 6

- *Add text under item 2: Submit all findings and forms to CALCTP administration within 48 hours of CALCTP-AT work completion using the CALCTP online web forms system; failure to do so will lead to in progress projects being deleted, suspension, and eventual expulsion from program.*
- *Update, remove items 12 and 13. Duplicate to items 10 and 11.*
- *Add text under item 17: maintain a comprehensive general liability insurance policy with a policy limit of at least \$1,000,000.00 per occurrence; and an aggregate limit of \$2,000,00.00.*

Pg. 7

- *Add new item 20: Keep all contact information relevant and updated. Office address(s), and accredited personnel contact information, name(s), E-mail(s), phone number(s) and website(s).*
- *Under Quality Assurance Program: Change from ICF to CalEnergy Corp.*

Pg. 8:

- *Add text under CALCTP-AT Employer Application, Records Maintenance, and Quality Assurance Fees: The CALCTP Board has established the following fee(s) for employers that want to become CALCTP-AT Employers. CALCTP does require that each CALCTP-ATE candidate submit an application and records maintenance fee along with an application to the program. CALCTP-AT employers must pay an annual maintenance fee.*

Pg. 9:

- *Updated 2025 Employer classification titles: Self-Employed/Owner Operator renamed to Owner-Operator. 1 Office renamed to Single Office. More Than 1 Office renamed to Multiple Offices.*
- *Updated 2025 Employer Initial Application Fees: Self-Employed with ATT cert from \$480 to \$995; 1 office from \$840 to \$1,195; multiple offices from \$1,140 to \$1,495*
- *Updated 2025 Employer recertification fees: Self Employed with ATT cert from split fee of \$420/\$210 (less than 50 projects over 3 years/more than 50 project over 3 years) to \$795 flat rate. One office from \$600/\$300 (less than 50 projects over 3 years/more than 50 project over 3 years) to \$995 flat rate. Recertification fee more than one office from \$750/\$460 (less than 50 projects over 3 years/more than 50 project over 3 years) to \$1,295 flat rate.*
- *Under 2nd paragraph removed ICF and replaced with CalEnergy Corp.*
- *Removal of paragraph: ~~Based on the program parameters, a percentage 20% of projects, chosen randomly, per employer will receive a paperwork “desk” review, or an and 10% of projects, chosen randomly, per employer will receive an onsite, in person, quality-assurance review. If an employer submits less than 5 projects per year than 1 “desk” review will be administered. If an employer submits between 5-9 projects per year than 1 “desk” review and 1 on site, in person, quality-assurance review will be administered. Each review will be based upon the following fee structure.~~*

Pg. 10:

- *New text:* Under **Project Review and Quality Assurance Policy:** In accordance with program requirements, CALCTP will conduct the following reviews on projects submitted by each employer: • **Desk Review:** 20% of projects per employer will undergo a documentation (“desk”) review. • **Onsite Quality Assurance Review:** 10% of projects per employer will be subject to an in-person, onsite quality assurance review.

For employers submitting fewer than five (5) projects annually, a minimum of one (1) desk review will be conducted. For employers submitting between five (5) and nine (9) projects annually, a minimum of one (1) desk review and one (1) onsite review will be conducted.

Desk reviews and onsite quality assurance reviews will be rounded up to the nearest whole percentage. At the end of each calendar year, CALCTP will assess the cumulative data and initiate audits based on the final rounded percentages.

All reviews are subject to the applicable fees listed in the current CALCTP fee schedule. Fees may change without notice. Invoices not paid within 30 days will result in suspension of the technician and/or employer’s account, and a reinstatement fee will be required.

- *Update:* Remove ICF and replaced with CalEnergy Corp.
- Update Desk audit review fee from \$300 to \$500 per Audit
- *Update* Site audit review fee from \$650 to \$1,000 per Audit

Pg. 12:

- *Add text under Application, Records Maintenance, and Training Exam Fees:* Invoices not paid within 30 days will result in suspension of the technician’s account, and a reinstatement fee will be required.
- *Update* initial Technician application/records maintenance fee from \$350 to \$495
- *Update* Annual Maintenance fee from \$165 to \$250
- *Add Reinstatement Late Fees:* Reinstatement Late Fee 30-180 Days - \$100, Reinstatement Late Fee After 6 Months - \$150.
- *Update:* Remove ICF and replaced with CalEnergy Corp.
- *Removal of text:* ~~The application and records maintenance fee is refundable with a written notice 2 weeks prior to the training date.~~
- *Update to text:* Because CALCTP is run by independent training centers, ~~some may charge~~ a training fee may be assessed ~~that is reasonable~~ to cover their expenses in operating the training.

Pg. 13:

- *Add new paragraph Training Attendance Policy:*
  - Application fees are non-refundable.
  - Rescheduling: Candidates unable to attend their scheduled training may register for a future session within one year of their scheduled training date.
  - Notice requirement: Candidates must provide at least two weeks’ written notice if they are unable to attend.
  - Fee for late notice: If proper notice is not given, the candidate must pay the training fee again to register for a future session
- *Update in footer:* Removal of footer references to past standards

Pg. 15:

- *Update:* Initial Application and Records Maintenance Fee Electronic/Paper for Alternative Pathway Applicants fee from \$350 to \$495
- *Update:* Annual Maintenance Fee from \$165 to \$250.
- *Add Reinstatement Late Fees:* Reinstatement Late Fee 30-180 Days - \$100, Reinstatement Late Fee After 6 Months - \$150.
- *Update:* Remove ICF and replaced with CalEnergy Corp.
- *Removal of text:* ~~The application and records maintenance fee is refundable with a written notice 2 weeks prior to the training date.~~
- *Update to text:* Because CALCTP is run by independent training centers, ~~some may charge~~ a training fee may be assessed ~~that is reasonable~~ to cover their expenses in operating the training.

Pg. 16:

- *Add new paragraph Training Attendance Policy:*
  - Application fees are non-refundable.
  - Rescheduling: Candidates unable to attend their scheduled training may register for a future session within one year of their scheduled training date.
  - Notice requirement: Candidates must provide at least two weeks' written notice if they are unable to attend.
  - Fee for late notice: If proper notice is not given, the candidate must pay the training fee again to register for a future session
- *Removal of text:* ~~Once the application is approved, the Applicant may pay by credit card through secure Web site.~~
- *Add text under Application Process:* Applications and supporting documents will not be reviewed until the application and records maintenance fee has been paid. Payment is made via electronic invoice and is non-refundable.

Pg. 17:

- *Add text under Notification of Eligibility or Ineligibility:* An Applicant applying for CALCTP-AT certification shall be notified of eligibility or ineligibility to sit for the certification course and examination no later than 2 weeks after the Application is submitted and the application and records maintenance fee has been paid.

Pg. 18:

- *Remove and add text from Refund Policy:* ~~The application and record maintenance fee is non-refundable with a written notice 2 weeks prior to the training date.~~
- *Add new paragraph Training Attendance Policy:*
  - Application fees are non-refundable.
  - Rescheduling: Candidates unable to attend their scheduled training may register for a future session within one year of their scheduled training date.
  - Notice requirement: Candidates must provide at least two weeks' written notice if they are unable to attend.
  - Fee for late notice: If proper notice is not given, the candidate must pay the training fee again to register for a future session

Pg. 24:

- *Remove #1 Lamp and Ballast Systems* under General Topic Areas of AT procedures and documentation test questions.
- *Update under #13: Measurement of illuminance* according to the Illuminating Engineering Society's measurement procedures as provided in the IESNA Lighting Handbook, 10th Edition, 2014, IES Lighting Library which are incorporated by reference.

Pg. 27:

- *Update to fee* under first paragraph for rescoring of exam from \$175 to \$225.

Pg. 28:

- *Update under Determination of Passing Score:* Remove ICF and replaced with CalEnergy Corp.

Pg. 29:

- *Update under Re-Scoring paragraph:* Update fee from rescoring exam from \$175 to \$225.

Pg. 30:

- *Update under Replacement Certificate paragraph:* Update fee from \$25 to \$100

Pg. 31:

- *Update under Replacement Identification Cards:* Update fee from \$25 to \$100

Pg. 32:

- *Add new paragraph under new heading, Project Submission Requirements, that contains the following sections:*

**Code Cycle Requirement**

- NRCA forms shall be produced strictly under the code cycle in effect at the time the building permit was applied for. The application date, as shown on the building permit, governs compliance and will be enforced without exception. Failure to comply will result in a failed desk review and enhanced oversight.

**Mandatory Documentation Submission**

- Applicants are required to submit complete and accurate NRCC and NRCI forms, together with a copy of the building permit, uploaded as supporting documentation. Incomplete, inaccurate, or missing documentation will result in a failed desk review and enhanced oversight.

**Project Submission Requirement**

- All projects must be submitted to CALCTP through the designated portal. Projects are prohibited from remaining in an "In Progress" state beyond forty-eight (48) hours from creation.

**Automatic Desk Review Enforcement**

- Any project not submitted within forty-eight (48) hours will be automatically subjected to a desk review. CALCTP Administration retains the authority to finalize and submit the project on behalf of the ATT/RP, regardless of the project's completion status at that time. Incomplete projects will result in a failed desk review and enhanced oversight.

### **Extension Requests**

- If an ATT/RP determines that a project cannot reasonably be completed within forty-eight (48) hours due to size or scope, a formal written request for extension must be submitted to CALCTP Administration for approval prior to the expiration of the forty-eight (48) hour period. Failure to obtain approval in advance will subject the project to desk review and enforcement action.

### **Precondition for Release of NRCA Forms**

- Completion and electronic submission of NRCA forms to CALCTP via the designated online portal is mandatory. Forms shall not be released for printing or download for submission to the applicable AHJ until CALCTP has received the electronic submission.

Pg. 35:

- *Update under Quality Assurance Program Description:* Remove ICF and replaced with CalEnergy Corp.
- *Update under How does Quality Assurance Work?* Remove ICF and replaced with CalEnergy Corp.
- *Update under Quality Assurance Procedures for CALCTP AT Employers, Submission Requirements:* Remove ICF and replaced with CalEnergy Corp.
- *Add new text under new heading: **Specific Requirements for Paperwork “Desk” Review Verification.***

CALCTP will perform Measurement and Verification (M&V) on approximately 20% of projects, selected at random based on a range of risk and performance factors. During these reviews, CALCTP will document any instances of non-conformance with CALCTP-AT standards.

In the event of a discrepancy between the verifier’s findings and the CALCTP-AT Technician documentation, the matter will be reviewed by CALCTP administration. All findings will be reported to the CALCTP-AT Employer and the CALCTP Board.

Pg. 36:

- *Add new text under new heading: **Specific Requirements for Paperwork “Desk” Review Verification.** (continued from Pg. 35)*

Additionally, CALCTP may share quality assurance findings with the California Energy Commission (CEC).

If a verified discrepancy is identified between the verifier and a CALCTP-AT Technician, the Employer will be subject to increased oversight. Specifically, the random sampling rate for their projects will increase to 30% until three (3) consecutive projects pass the paperwork desk review without issue. CALCTP may also initiate targeted audits to verify the accuracy and completeness of project documentation during this heightened oversight period.

In cases of recurring non-compliance, CALCTP reserves the right to take disciplinary action against the Employer and all CALCTP-AT Technicians under their supervision, up to and including revocation of credentials



- *Remove old and add new text under: Specific Requirements for Onsite Quality Assurance Review:*

~~CALCTP will conduct measurements and verification of a randomly determined percentage of projects based on a variety of determining factors. CALCTP records observations of work that are not in conformance with CALCTP-AT Standards. Any discrepancies between the records of the verifier and the CALCTP-AT contractor shall be reviewed by CALCTP administration. Information from these visits shall be reported directly to the CALCTP-AT employer and the CALCTP Board. Further, the information from quality assurance may also be shared with CEC.~~

~~If a discrepancy is observed between the verifier and the CALCTP-AT Technician, the CALCTP-AT Employer will have a number of sites retested to verify test results. If there is a reoccurring problem, the Employer and all CALCTP-AT Technicians working for said Employer may be punished, including up to revocation of credential.~~

CALCTP will conduct Measurement and Verification (M&V) on approximately 10% of projects, selected at random based on performance and risk-based criteria. During these site visits, CALCTP will document any instances of non-compliance with CALCTP-AT Standards.

If a discrepancy is identified between the verifier and a CALCTP-AT Technician, the Employer will be subject to increased oversight. Specifically, the random sampling rate for their projects will increase to 20% until two (2) consecutive projects pass the onsite quality assurance review without issue. CALCTP may also initiate targeted audits to verify the accuracy and completeness of project documentation during this heightened oversight period.

If a verifier is unable to gain access to a project site for a scheduled audit—despite proper notification via email to the CALCTP-AT Contractor, regardless of acknowledgment—the audit will be deemed inconclusive. In such cases, the CALCTP-AT Contractor will be assessed for a fee equal to 60% of the standard field verification rate, or \$600.00. The contractor will also be notified via email of a subsequent attempt to complete the audit. If access is again denied or unavailable, the audit will be recorded as a failed verification, the contractor will be assessed the full audit fee, and the contractor will be subject to increased oversight as outlined in the quality assurance procedures.

Pg. 37:

- *Add new text under: Specific Requirements for Onsite Quality Assurance Review (con't from Pg. 36):*

If a site has “sensitive” or “restricted access,” the CALCTP-AT contractor must provide CALCTP with a letter before the first or second audit attempt, and an alternate site will be selected. However, the above fee will still apply for any inconclusive visit.

In addition to M&V activities, CALCTP reserves the right to perform audits of CALCTP-AT Employer and Technician documentation, including but not limited to installation records, test results, and submittals. These audits may occur independently of scheduled site visits and can be initiated based on risk indicators, complaints, or observed trends in performance.

Discrepancies between verifier findings and contractor records will be reviewed by CALCTP Administration and reported to both the CALCTP-AT Employer and the CALCTP Board. Information may also be shared with the California Energy Commission (CEC), as necessary.

Repeated or ongoing non-compliance may result in disciplinary action against the Employer and all affiliated CALCTP-AT Technicians, up to and including credential revocation.

Pg. 39:

- *Update under heading Obtain Information and Ask Questions: Update to remove ICF address.*
- *Update under heading Change of Address or Name: Update to remove text: If a CALCTP-AT Technician has a change of address, employer, or other change, it is the CALCTP-AT Technician’s responsibility to notify CALCTP, as well as to provide required proof if a name change has occurred at any time. required proof if a name change has occurred, at any time. In addition, all Candidates will be given an opportunity to file a change of address at the examination site.*

Pg. 47:

- *Update under item d: Remove ICF and replaced with CalEnergy Corp.*

Pg. 53:

- *Update to contact information under A: Complaints against a CALCTP-AT Technician and/or Employer can be accepted ~~in writing~~ electronically to CALCTP at: info@calctp.org ~~or through CALCTP Administration at: CALCTP, c/o ICF, 555 W. Fifth Street, Suite 3100, Los Angeles, CA 90013.~~*

Pg. 55:

- *Under #2 Terms of Agreement, Notice of Breach, Suspension or Termination or Automatic Renewals, second paragraph, add and remove text as follows:* CALCTP will notify a CALCTP-AT Employer electronically and/or in writing when it is in breach of this agreement. Companies will be given fifteen (15) business days to correct the breach condition and provide evidence to (~~insert name of accreditation organization~~) CALCTP that the breach condition has been rectified and that the company's policies and procedures have been changed to prevent a similar violation in the future.
- *Under 2.1.1 remove the word written:* If CALCTP finds that the CALCTP-AT Employer is in breach of the terms of this agreement and the breach conditions are not corrected by the CALCTP-AT Employer within fifteen (15) business days of receiving ~~written~~ notice from CALCTP;

Pg. 55-56:

- *Under 2.1.5, Remove text as follows:* If the CALCTP-AT Employer fails to pay, when due, any amount payable under this agreement. ~~and such failure to pay shall continue for a period of thirty (30) CALCTP-AT Handbook Version 24 25 April May 2025 2022 2025 Code days after the date such payment is due. If the CALCTP Accredited organization fails to pay, when due, any amount payable under the Accreditation Agreement and such failure to pay shall continue for a period of fifteen (15) business days after the company has received a letter notice stating that it is in breach of this agreement for non-payment. Letters. Notices of breach of nonpayment will be sent out within thirty (30) days after the due date.~~

Pg. 56:

- *Under 2.2, added text as follows:* This agreement may be terminated by CALCTP upon thirty (30) days electronic and/or written notice from CALCTP to the CALCTP Accredited Company upon the occurrence of any of the following:
- *Under 4, Payment Terms, #4.1, added and removed text as follows:* Payments for services rendered shall be paid to CALCTP in accordance with the predetermined schedule of fees. The CALCTP-AT Employer shall remit payment to CALCTP, by way of a ~~check~~ ACH or credit card, per the terms noted on the invoice.

Pg. 57:

- *Under 9 Disciplinary Actions, 91., add and remove text as follows:* The parties acknowledge that disciplinary actions taken by CALCTP are to protect the integrity of the credentialing process and are always intended as a course of last resort when other conformance actions have failed. The CALCTP-AT Employer shall have a reasonable opportunity to return to conformance, after electronic and/or written warning and a specified period of time, prior to formal disciplinary action being taken by CALCTP. However, CALCTP may take appropriate disciplinary action against any individual or CALCTPAT Employer that willfully violates obligations of any agreement and fails to conform, after electronic and/or written warning, within the specified period of time. CALCTP shall use, but not be limited to, official ~~letters~~ notices of warning, ~~letters~~ notices of reprimand, financial penalties, suspensions, and terminations.