

**DOCKETED**

<b>Docket Number:</b>	22-HERS-01
<b>Project Title:</b>	2022 HERS Provider Applications for the 2022 Building Energy Efficiency Standards
<b>TN #:</b>	246236
<b>Document Title:</b>	Exhibit N - Registry User Manual
<b>Description:</b>	N/A
<b>Filer:</b>	Jennifer Brazell
<b>Organization:</b>	CalCERTS, Inc.
<b>Submitter Role:</b>	Applicant
<b>Submission Date:</b>	9/28/2022 12:16:56 PM
<b>Docketed Date:</b>	9/28/2022

# Exhibit N

Registry User Manual





# CalCERTS Registry User Manual



2022 ENERGY CODE

Version: January 1, 2023



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## Introduction

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

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


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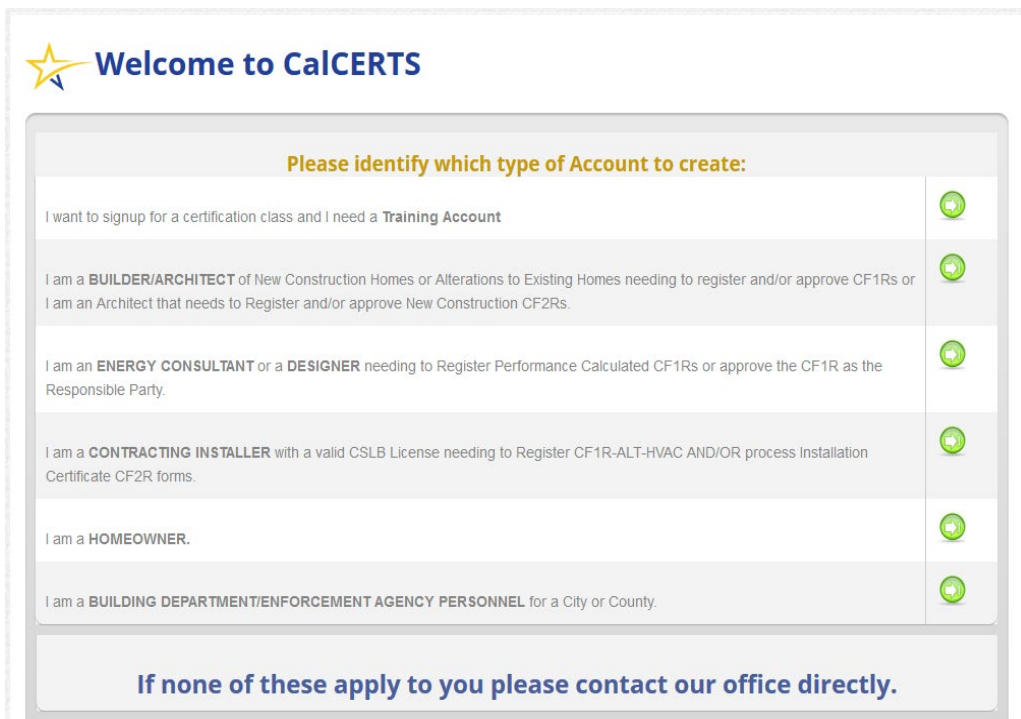
## Registry Overview

### User Registration

- To create an account as a user within the CalCERTS registry go to [www.calcerts.com](http://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.



**Welcome to CalCERTS**

**Please identify which type of Account to create:**

I want to sign up for a certification class and I need a **Training Account**

I am a **BUILDER/ARCHITECT** of New Construction Homes or Alterations to Existing Homes needing to register and/or approve CF1Rs or I am an Architect that needs to Register and/or approve New Construction CF2Rs.

I am an **ENERGY CONSULTANT** or a **DESIGNER** needing to Register Performance Calculated CF1Rs or approve the CF1R as the Responsible Party.

I am a **CONTRACTING INSTALLER** with a valid CSLB License needing to Register CF1R-ALT-HVAC AND/OR process Installation Certificate CF2R forms.


I am a **HOMEOWNER**.

I am a **BUILDING DEPARTMENT/ENFORCEMENT AGENCY PERSONNEL** for a City or County.


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




- **HERS Raters**

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

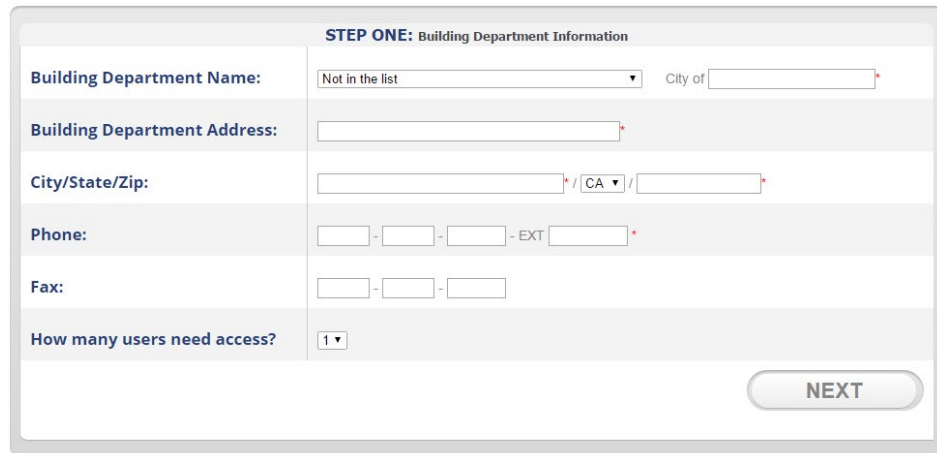
- Homeowners must register with CalCERTS to sign Certificates of Compliance (CF1Rs) and Certificates of Installation (CF2Rs) if needed.
- Homeowners may self-register by selecting the  link and inputting the required information for verification. Once the account has been verified, the Homeowner will 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.

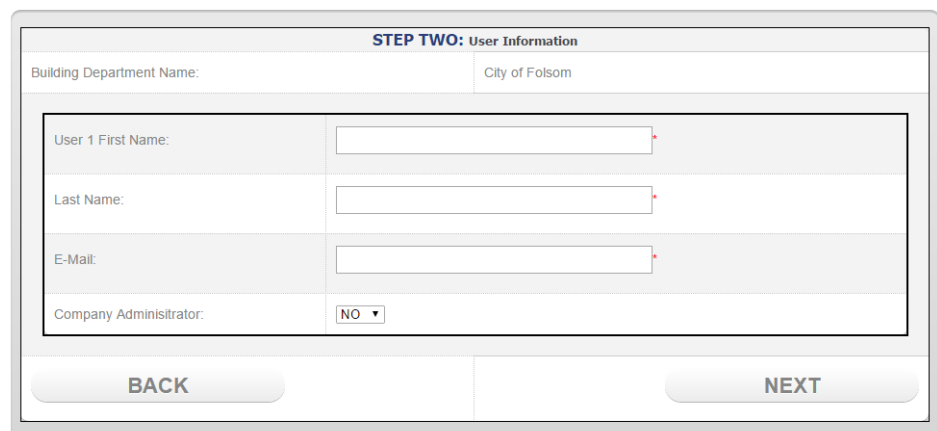
○ **Building Department Self-Registration Process**

- Visit [www.calcerts.com](http://www.calcerts.com)
- Click **Create An Account**  located in the upper right of our home page.
- Click the **Register**  icon located to the right of   
I am a **BUILDING DEPARTMENT/ENFORCEMENT AGENCY PERSONNEL** for a City or County.
- Click **No** if you have not had a CalCERTS account before.
- Input the required information for Step ONE and Click **NEXT**:



The screenshot shows a web form titled "STEP ONE: Building Department Information". It contains several input fields: "Building Department Name" (a dropdown menu with "Not in the list" selected and a "City of" dropdown), "Building Department Address" (a text box), "City/State/Zip" (a text box with a dropdown for state, currently showing "CA"), "Phone" (a text box with hyphens and an "EXT" field), "Fax" (a text box with hyphens), and "How many users need access?" (a dropdown menu with "1" selected). A "NEXT" button is located at the bottom right of the form.

- **Note:** You can register as many users as needed within your Building Department.
- Input the required information for **Step TWO** and Click **NEXT**:



The screenshot shows a web form titled "STEP TWO: User Information". It contains several input fields: "Building Department Name" (a dropdown menu with "City of Folsom" selected), "User 1 First Name" (a text box), "Last Name" (a text box), "E-Mail" (a text box), and "Company Administrator" (a dropdown menu with "NO" selected). "BACK" and "NEXT" buttons are located at the bottom of the form.



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

The screenshot displays a web form titled "STEP THREE: FINAL CONFIRMATION". It is divided into several sections:

- Building Department Info:** City of Folsom, 31 natoma, Folsom, CA 95630, 916-985-5555.
- User 1:** John BDepartment, jbd@department.com, HAS ADMINISTRATOR PERMISSIONS.
- Verification:** A prompt to verify the user is a real person by typing numbers and letters from a CAPTCHA image (M8 K N M C). Below the image is an empty input field.
- Navigation:** "BACK" and "REGISTER" buttons at the bottom.

- 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](mailto:support@calcerts.com).


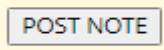
*All CalCERTS Raters and Registry Subscribers are required to protect their login and password, pursuant to the terms of their Subscriber Agreement. “Subscriber will be issued a secure login and password to the Registry. Subscriber may not provide their login and password to any person including, without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

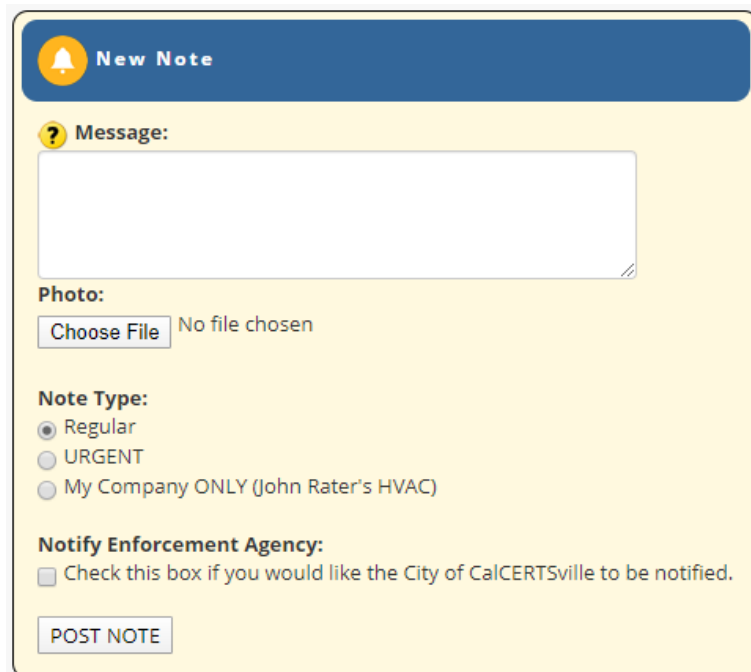
## Key Terms

- **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  [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.




The screenshot shows a 'New Note' form with a blue header bar containing a bell icon and the text 'New Note'. Below the header is a 'Message:' section with a question mark icon and a large text input area. Underneath is a 'Photo:' section with a 'Choose File' button and the text 'No file chosen'. The 'Note Type:' section has three radio button options: 'Regular' (selected), 'URGENT', and 'My Company ONLY (John Rater's HVAC)'. The 'Notify Enforcement Agency:' section has a checkbox and the text 'Check this box if you would like the City of CalCERTSville to be notified.'. At the bottom is a 'POST NOTE' button.

## 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  **CF-1R Registration** on the left menu.
- Select the following subcategories listed under CF1R Registration:

**New Construction CF1R Bin  
(2008-2019)**

- 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:

 CF1R Bin for John Rater's HVAC


 [Register/Upload Calculation File](#) (Performance New Construction, Addition Only or E+A+A Plans)


 CalCERTS CF1R Registration Process for Performance Calculation Files created by an approved Software Provider (like CBECC or EnergyPro).  
You can upload up to **5** files at a time.

Plan Name	File
<i>Leave this blank if you want to use the Project Name from the calculation file being uploaded</i>	<input type="button" value="Choose File"/> No file chosen
<input type="text"/>	<input type="button" value="Choose File"/> No file chosen
<input type="text"/>	<input type="button" value="Choose File"/> No file chosen
<input type="text"/>	<input type="button" value="Choose File"/> No file chosen
<input type="text"/>	<input type="button" value="Choose File"/> No file chosen
<input type="text"/>	<input type="button" value="Choose File"/> No file chosen
<input type="button" value="Upload Plan(s)"/>	

- 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.

ID	Plan Name	File Name	Result
2796640	1 1 Story 2 Bedroom PH - Bakery	Plan 1.xml	FILE UPLOADED
2796640	2 2 Story 3 BR Executive CH 2	Plan 2.xml	SUCCESS
		Plan 3.xml	FILE NOT UPLOADED
		Plan 4.xml	Not a Valid XML File

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

**DRAFT CF1R Document:** 

Select Signing Options Below:

**DOCUMENTATION AUTHOR**

Assign Documentation Author: Use this option to assign SOMEONE ELSE to sign as Documentation Author

-OR-




I want to SIGN as the Documentation Author: Use this option if YOU want to sign as Documentation Author

**RESPONSIBLE PERSON**




Assign Responsible Person: Use this option to assign SOMEONE ELSE to sign as Responsible Person

-OR-

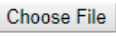

I want to SIGN as the Responsible Designer: Use this option if YOU want to sign as Responsible Person

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

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


- Access the project within [www.calcerts.com](http://www.calcerts.com).
- Click CF1R  icon located in the project road map 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.

Plan Name	File
<small>Leave this blank if you want to use the Project Name from the calculation file being uploaded</small>	<input type="button" value="Choose File"/> No file chosen
	<input type="button" value="Choose File"/> No file chosen
	<input type="button" value="Choose File"/> No file chosen
	<input type="button" value="Choose File"/> No file chosen
	<input type="button" value="Choose File"/> No file chosen
	<input type="button" value="Choose File"/> No file chosen
	<input type="button" value="Upload Plan(s)"/>



- 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.

ID	Plan Name	File Name	Result
2750472	2 Zone MF Example CE1	Plan 2.xml	FILE NOT UPLOADED The Calculation File you are trying to upload is for Single Family. This is a Multifamily Project. SUCCESS

- 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  **CF-1R Registration** 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


## Request a Plan (CF1R) Transfer Process

Use this process to request a registered Plan (CF1R) from another user.

Please provide the **CEC Registration #**, the **CalCERTS Plan ID** or **Address** of the CF1R:

Examples: 219-P010102808A, 216-N0008555A, 123456, 123 Main (DO NOT include Street, Way, Blvd, etc)

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

 Request a Plan (CF1R) Transfer Process

**Search Results**

The following record was found

Plan ID:	3012240
CEC Registration #:	220-P010172603A
Energy Code Standards:	2019
Plan Type:	Multifamily
Project Scope:	NewConstruction

If this appears to be the correct CF1R you are looking for, please provide a message that will be recieved by the owner of the CF1R.

- **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 - TBD
  - Certificates of Installation – CF2R Forms - TBD
  - Certificates of Verification – CF3R Forms - TBD
- 2022 Multi-Family Compliance Forms – TBD
  - Certificates of Compliance – LMCC Forms - TBD
  - Certificates of Installation – LMCI Forms - TBD
  - Certificates of Verification – LMCV Forms - TBD
- 2022 Nonresidential Compliance Forms – TBD
  - Certificates of Verification – NRCV Forms - TBD
- [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

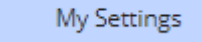
- Registry users sign documents electronically. To sign documents, users must record their electronic signature. There are three options to record a signature: 1) Choose a Font Style; 2) Use Website Capture; or 3) Upload a Scanned Image of the Signature.
- Once a signature is recorded the user may proceed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



### John Rater's HVAC

- My User Profile
- My Company Info
- My On-line Training
- My Tools

- Select the **My User Profile** from the dropdown menu.

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

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

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

- **Option 1: Font Style**

A screenshot of a web form for selecting a signature font. At the top, there is a dropdown menu labeled "Signature Option:" with "Font Style" selected. Below this is a text input field containing the name "Johnny Rater". Underneath, the text "Please select one of the following fonts:" is displayed. There are three radio button options, each followed by a sample of the signature "Johnny Rater" in a different font style: A: *Johnny Rater*, B: **B: Johnny Rater** (bold), and C: *Johnny Rater*. A "Save Choice" button is located at the bottom right of the form. Below the form, the text "Your APPROVED Signature looks like this:" is shown, followed by a large, stylized cursive signature "Johnny Rater".

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

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

Signature Option: Website Capture ▾

Name: Johnny Rater

Using your mouse, draw your signature below:

Sign above

Clear

Save

The screenshot shows a web form for the 'Website Capture' signature option. At the top, there is a dropdown menu set to 'Website Capture'. Below it is a text input field containing the name 'Johnny Rater'. A prompt asks the user to 'Using your mouse, draw your signature below:'. A large rectangular box contains a handwritten signature in black ink that reads 'Johnny Rater'. Below the signature box are two buttons: 'Clear' and 'Save'.

- Once completed, select **Save**.

- **Option 3: Scanned Image**
  - Upload a scanned copy of your signature. The scanned image must be a JPG file with a resolution of 72 DPI. Please note: this option must be manually reviewed and approved by CalCERTS. Turnaround time can take up to one business day.

Signature Option: Scanned Image ▾

Name: Johnny Rater

1. [\[Download\]](#) Signature Form
2. Scan your signature and save it as a JPG file (700 pixels wide by 200 pixels high and a resolution of 72 DPI)
3. Upload it below

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

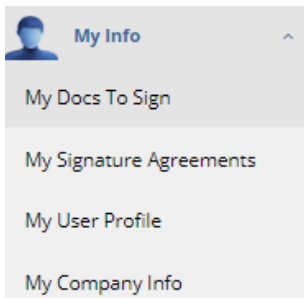
Choose File | No file chosen

Upload File

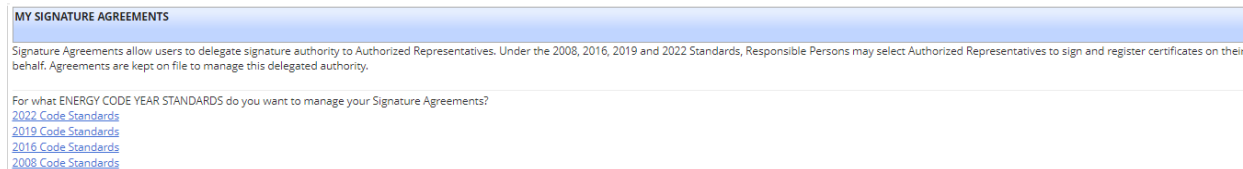
The screenshot shows a web form for the 'Scanned Image' signature option. At the top, there is a dropdown menu set to 'Scanned Image'. Below it is a text input field containing the name 'Johnny Rater'. A list of three instructions is provided: 1. '[Download] Signature Form', 2. 'Scan your signature and save it as a JPG file (700 pixels wide by 200 pixels high and a resolution of 72 DPI)', and 3. 'Upload it below'. Below the instructions is an 'Upload File' section with the text 'To update your signature, select a file:'. There are two buttons: 'Choose File' and 'Upload File'. The 'Choose File' button is highlighted, and the text 'No file chosen' is displayed next to it.

## Signature Agreements

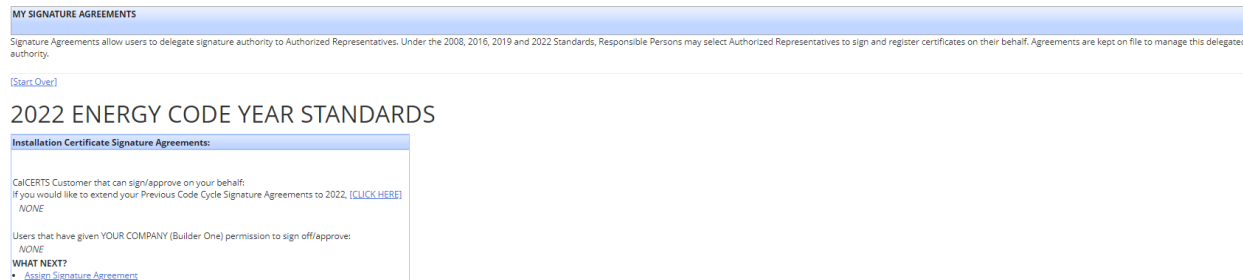
- Signature Agreements allow CSLB licensed Builders and Installers to delegate signature authority to Authorized Representatives. Under the 2008, 2016, 2019 and 2022 Standards, Responsible Persons may select Authorized Representatives to sign and register certificates on their behalf. Agreements are 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 the applicable Building Standards.



- **Select Assign Signature Agreements.**



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

**MY SIGNATURE AGREEMENTS**

Signature Agreements allow users to delegate signature authority to Authorized Representatives. Under the 2008, 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.

[\[Start Over\]](#) [\[Back\]](#)

## 2022 ENERGY CODE YEAR STANDARDS

**Certificate of Installation Signature Agreements (CF2R)**  
To give a Customer Signature Authority, please provide us with the Customer's ID at CalCERTS, Inc.

Customer ID:

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

- *If 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.


**MY SIGNATURE AGREEMENTS**

Signature Agreements allow users 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.

[\[Start Over\]](#) [\[Back\]](#)

## 2022 ENERGY CODE YEAR STANDARDS

**Certificate of Installation Signature Agreements (CF2R)**

I, **Johnny Builder**, give my Signature Authority  to **John Rater's HVAC in Folsom (CA)** at CalCERTS, Inc for the purposes of Certificate of Installation Signing.

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

I am aware that by authorizing this Signature Agreement, **John Rater's HVAC** (and their employees) will be able to process and register official CF2R's for submission to building departments. It is my responsibility to make sure that the documents are the correct documents to be submitted.

Check this box to agree.

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

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

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

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

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

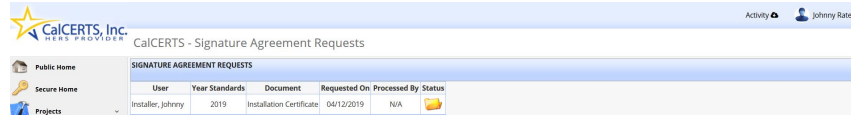
▪ **To Accept Signature Authority**

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

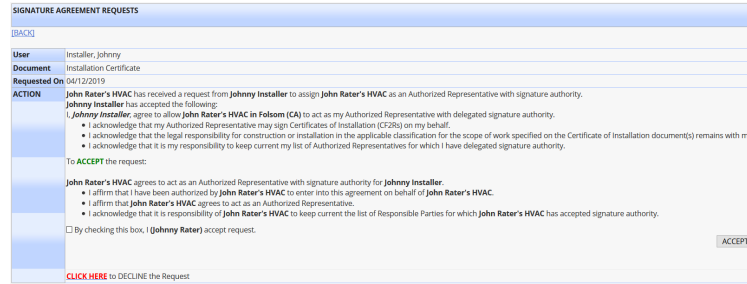
**YOU HAVE ALERTS**

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

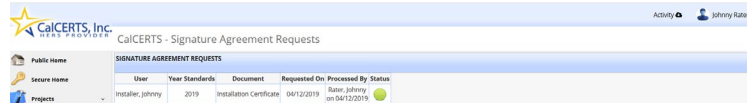
- Select the **Click Here** link in the Alert Message to view delegated authority requests.
- Next, select the folder associated with the active request.



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

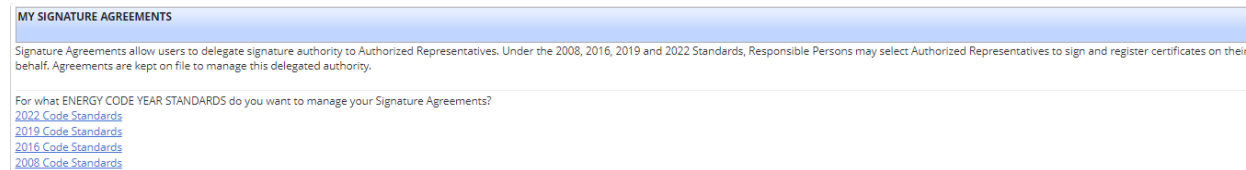


- Once **Accepted** or **Declined**, a confirmation page will display the date the agreement was requested and processed.

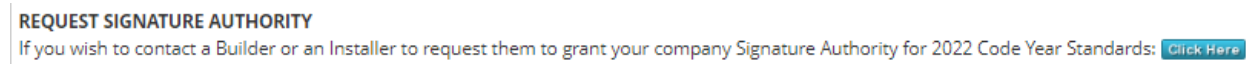


- Once completed, a PDF copy of the Signature Authority Agreement will be mailed to the parties of the Agreement.

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



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





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

**MY SIGNATURE AGREEMENTS**

This tool will allow you to make a request to Builder or an Installer to have them grant you signature authority for Installation Certificates Only (CF2Rs).

Please Select the companies you wish to contact:  
*(Note this list is pulled from your My Builders/Architects and your My Installers lists.*

Builder One  
**Builder Two**  
 DEV INSTALLERS &

NEXT

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

Company	User	SEND REQUEST
Builder Two	Builder, Jimmy	<input checked="" type="checkbox"/>
Builder Two	Builder, Johnny	<input checked="" type="checkbox"/>
Builder Two	Tester, Test T	<input type="checkbox"/>

START OVER    NEXT



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

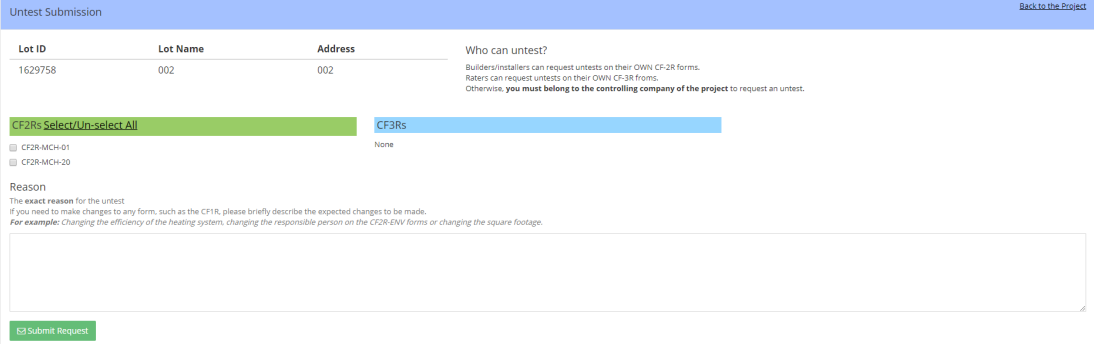
**Note:** Once the users confirm signature authority, you will receive an email notification.

## 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**.




Lot ID	Lot Name	Address	Who can untest?
1629758	002	002	Builders/installers can request untests on their OWN CF-2R forms. Raters can request untests on their OWN CF-3R forms. Otherwise, you must belong to the controlling company of the project to request an untest.

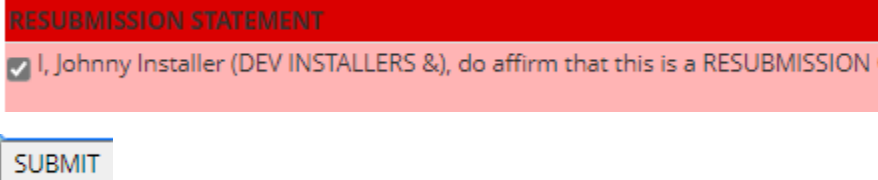
**CF2Rs Select/Un-select All** | **CF3Rs**

CF2R-MCH-01  
 CF2R-MCH-20

None

**Reason**  
The exact reason for the untest  
if you need to make changes to any form, such as the CF1R, please briefly describe the expected changes to be made.  
*For example: Changing the efficiency of the heating system, changing the responsible person on the CF2R-ENV forms or changing the square footage.*

- 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**.



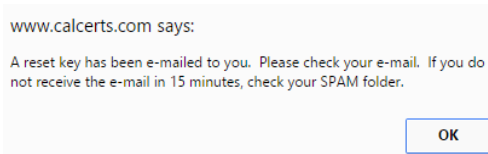
**RESUBMISSION STATEMENT**

I, Johnny Installer (DEV INSTALLERS &), do affirm that this is a RESUBMISSION

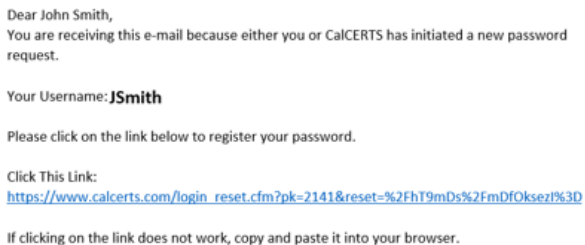
Note: Resubmitted certificates are identified by alphanumeric versions (A,B,C, etc.) at the end of the CEC registration number located on the bottom of each registered document.

## Recover or Reset Password

- Visit [www.calcerts.com](http://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](mailto: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**

**Reset Password**

Your Username: **JSmith**

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

New Password:

Verify New Password:

## Getting Started

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





- Once within the Registry, choose a **Project Type** and **Standardd Year**.
  - To choose a Project Type select the **Projects** Dropdown located on the left side menu






















- Next select the Project Type from the drop-down menu.
  - Project Types Include:
    - **New Construction – Residential**
    - **New Construction - Non-Residential**
    - **Alterations – Residential**
    - **Alterations Non-Residential**
    - **Home Energy Ratings**
    - **Multi-Family Low Rise New Construction – Residential (TBD)**
    - **Multi-Family Low Rise Alterations – Residential (TBD)**
    - **Multi-Family High Rise New Construction - Non-Residential (TBD)**
    - **Multi-Family High Rise Alterations Non-Residential (TBD)**



## New Construction – Residential Projects:

- Select the green add New Project  icon to display 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) <i>Note - these type of projects ARE NOT FOR HOMEOWNERS.</i> <i>Performance Calculation File ONLY</i> 						
- Single Family Residence (SFR) - Custom Home - SINGLE BUILDING (Single Address, Single Orientation, Single Lot, etc) <i>Performance Calculation File or Prescriptive CF1R-NCB-01</i> 						
- Single Family Residence (SFR) - SINGLE ADDRESS <b>ADDITION ONLY</b> <i>Performance Calculation File or Prescriptive CF1R-ADD-01</i> 	N/A	N/A				

- Next, input the required information.

**New 2022 New Construction SINGLE FAMILY RESIDENCE SINGLE ADDRESS Project**

Project Name:

Project Type:

Zip Code:  Required before ANY CF1R can be issued.

Default Gas Utility:

Default Electric Utility:

- Select Create Project



## Alterations – Residential Projects

- 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 display a menu of **New Construction – Alteration Project Types**, then

- Select the green add New Project icon next to the desired Project Type.


**2022 Standards**  
**\*\*\* ATTENTION \*\*\*** Check with your local code enforcement agency for what Standards to be using.  
**The effective date for 2022 Code Standards is 1/1/2023.**

Project Type	2022 Code Standards	Fast Track Standards Process
- Prescriptive Residential Alterations <i>CF1R-ALT-01 (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan)</i>		
- Prescriptive Residential Alterations (Space Conditioning Systems) <i>CF1R-ALT-02</i> <i>This is the most common project type for HVAC systems</i> <i>Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.</i>		
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to <a href="#">New Construction</a> .		
- Consumer Certificate (Only for HERS Verification - DO NOT USE THIS OPTION IF YOU NEED A CF1R OR NEED TO REGISTER CF2Rs)		

- 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.

- 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.*



- Next, input the required information.

**Create New 2022 Prescriptive Approach Alteration Project**

Project Name:

Street Address:

Zip Code:  Must be a valid whole number, no decimals

City:

Enforcement Agency / Building Department:

Project Type: ?

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

Zip Code is required and must be 5 digits  
 Select a City and Building Department

- **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.



[GO TO ALT-01 FORM](#)

- Click this to go directly to the CF1R-ALT-01 Form.

[GO TO PROJECT HOME PAGE](#)

- Click this to go to the Project Home Page first (so you can share the project first if needed).

### Non-Residential Project Types

- Select the green add New Project  icon to display 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.

**Create Non-Residential Project**

Please select the TYPE of Project you wish to create:

Project Type	Year Standards				
	2008	2013	2016	2019	2022
- New Construction Non-Residential					
- Alteration Non-Residential					

## 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.

**Create New 2022 Non-Residential New Construction Project**

Project Name:

Project Zip Code:  Must be a valid whole number, no decimals

What Type of Project?

Number of systems required:  Use a positive number.

Installer CSLB:  Enter 0 if installed by owner. Must be a valid whole number, no decimals

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

**Project Information (Non-Res New Construction)**

Energy Standards Code Year: 2022

Company Controlling Project: John Rater's HVAC

Project Name:

Zip Code:

Project Address:  Required before ANY NRCV Certificate can be issued.

Project City:

Enforcement Agency / Building Department:

Permit Number:  Required before ANY NRCV Certificate can be issued.

Permit Application Date:  Date must be no greater than today and is required before ANY NRCV Certificate can be issued.

Utility - GAS:

Utility - ELECTRICITY:

Project Construction Manager:  Required before ANY NRCV Certificate can be issued.

Contact Phone Number:  Required before ANY NRCV Certificate can be issued.

**Information**

Installer CSLB:  Enter 0 if installed by owner. Must be a valid whole number, no decimals


Installer Company Name: Owner

Installer Contact Name:  Required before ANY NRCV Certificate can be issued.

Installer Contact Phone:  Required before ANY NRCV Certificate can be issued.


Project Status:

## 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.

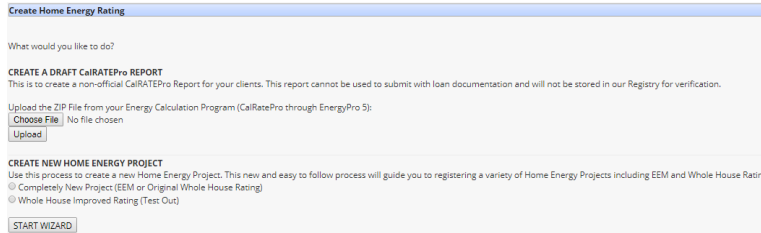
Create New 2022 Non-Residential Alteration Project	
Project Name:	<input type="text"/>
Project Zip Code:	<input type="text"/> <small>Must be a valid whole number, no decimals</small>
What Type of Project?	NRCV-MCH-04 (Duct Leakage) ▼
Number of systems required:	<input type="text"/> <small>Use a positive number.</small>
Installer CSLB: <small>Enter 0 if installed by owner</small>	<input type="text"/> <small>Must be a valid whole number, no decimals</small>
<input type="button" value="CREATE PROJECT"/>	

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

Project Information (Non-Res Alteration)	
Energy Standards Code Year:	2022
Company Controlling Project:	John Rater's HVAC
Project Name:	<input type="text" value="ALT Non-Res Test"/>
Zip Code:	<input type="text" value="95630"/>
Project Address:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project City:	--- SELECT FROM LIST --- ▼
Enforcement Agency / Building Department:	--- SELECT FROM LIST --- ▼
Permit Number:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Permit Application Date: 	<input type="text"/> <small>Date must be no greater than today and is required before ANY NRCV Certificate can be issued.</small>
Utility - GAS:	None ▼
Utility - ELECTRICITY:	None ▼
Project Construction Manager:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Contact Phone Number:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Information	
Installer CSLB: <small>Enter 0 if installed by owner</small>	<input type="text" value="0"/> <small>Must be a valid whole number, no decimals</small>
Installer Company Name:	Owner
Installer Contact Name:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Installer Contact Phone:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project Status:	Active ▼
<input type="button" value="SAVE"/>	

## Home Energy Ratings

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



The screenshot shows a web form titled "Create Home Energy Rating". It asks "What would you like to do?" and provides two main options:


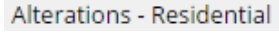

- CREATE A DRAFT CalRATEPro REPORT**: This is to create a non-official CalRATEPro Report for your clients. This report cannot be used to submit with loan documentation and will not be stored in our Registry for verification. It includes a file upload section for a ZIP file from an Energy Calculation Program (CalRatePro through EnergyPro 5), with a "CHOOSE FILE" button and an "Upload" button.
- CREATE NEW HOME ENERGY PROJECT**: Use this process to create a new Home Energy Project. This new and easy to follow process will guide you to registering a variety of Home Energy Projects including EEM and Whole House Rating. It includes radio buttons for "Completely New Project (EEM or Original Whole House Rating)" and "Whole House Improved Rating (Test-Out)".

At the bottom of the form is a "START WIZARD" button.

*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  Projects 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:

**Create Alteration Project**

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

**IF YOU HAVE A PERMIT ALREADY**

What is your PERMIT ISSUE DATE?

09/26/2019  NEXT


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

**IF YOU DO NOT HAVE A PERMIT ALREADY**


[CLICK HERE](#)






**QUICK LINKS**


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

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









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


- Click the **New Project 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 <i>This is the most common project type for HVAC systems Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.</i>		
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to <a href="#">New Construction</a> .		
- 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 










**A. GENERAL INFORMATION**


Installer <i>(This list comes from your My Installers list)</i>	DEV INSTALLERS & (137345) ▾
 Project Name	Fast-Track
Street Address	31 Natoma St
Zip Code	00000
City	CalCERTSville ▾
 Enforcement Agency / Building Department	CalCERTSville (City) ▾
 Building Type	Single Family ▾
 Square Footage	1234
 Climate Zone	1 ▾
 Number of space conditioning (SC) systems	1
 IF MORE THAN ONE SYSTEM, will ALL of these systems be IDENTICAL?	<input type="button" value="No"/>
 Where did the VRF question go?	


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

**B. Space Conditioning (SC) System Information**

**SC System 1**

01  System Name	System 1
02  System Area Served	Location 1
03  Floor Area served by System	
04  Is the SC system a ducted system?	<input type="button" value="No"/>
05  Installing a refrigerant containing component?	<input type="button" value="No"/>
06  Installing new SC System components?	<input type="button" value="No"/>
07  Installing more than 40 feet of ducts OR Installing ANY length of duct with a new or complete replacement SC system?	<input type="button" value="No"/>
08  Installing entirely new duct system?	<input type="button" value="No"/>
09  Installing entirely new SC system?	<input type="button" value="No"/>

- Input the required System information for Step 3 and Click **NEXT** link 
- 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 .



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:

**DOCUMENTATION AUTHOR**  
 Documentation Author Name: Casandra Dentley  
 Documentation Author Company Name: CalCERTS, Inc.  
 CEA/HERS Certification Identification (If applicable):

**RESPONSIBLE PERSON**  
 Responsible Company Name:   
 Responsible Designer Name:   
 License:

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**.

**Project Info**

Permit Number:

Permit Date:

*Permit # and Permit Date is Required BEFORE CF2Rs can be registered*

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

**CF2Rs**


CF2R-MCH-01


- Input CF2R Results; click **NEXT**  or **BACK**  to navigate through the pages.



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

RESPONSIBLE PERSON	
Responsible Company Name	TBD
Responsible Builder/Installer Name	TBD
Position With Company	Owner

- 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**.

 **QUICKPAY**

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

There will be a \$2.00 charge for this registration.




If you wish to **QUICKPAY** for this certificate, check this box:

I, **Casandra Dentley**, authorize CalCERTS to apply the total of **\$2.00** against my CalCERTS, Inc. Account.

**Charge Me Later:** Charge per my CalCERTS Invoice Agreement:

**CURRENT AGREEMENT:** This transaction TOTAL will be added to your **Batch**  invoicing that will be automatically charged against your credit card on file at close of day.

**Pay on Account:** Deduct total from the Credit Account of CalCERTS, Inc..

- 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**.

**Homeowner Info**

Homeowner Name:

Homeowner Phone:

Alternate Phone Number:


*Homeowner Information is Required BEFORE CF3Rs can be registered*

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

*Project must be transferred to a HERS Rater for completion.*

CalCERTS Rater ID Number:

- 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**.

The following projects will be associated:

Project ID	Project Name	Address	System Name
1361993	A-5-D-CO-E-N-15	31 Natoma Street	System 1
1374810	AYNS-5-D-CO-E-N-15	AYNS-5-D-CO-E-N-15	System 1
1491687	asdfasdf	adsfsad	System 1

- Next the CF3Rs can be registered.
- Click the **Report Results** link  located to the right of the CF3R you would like to access.


**CF3Rs**


CF3R-MCH-20 - System 1 - Location 1	<input type="button" value="Report Results"/>
CF3R-MCH-23 - System 1 - Location 1	<input type="button" value="Report Results"/>
CF3R-MCH-22 - System 1 - Location 1	Complete MCH23 First

- Input CF2R Results; Click **NEXT**  or **BACK**  to navigate through the pages.

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

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

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

 **QUICKPAY**

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

**There will be a \$2.00 charge for this registration.**




If you wish to **QUICKPAY** for this certificate, check this box:

I, **Casandra Dentley**, authorize CalCERTS to apply the total of **\$2.00** against my CalCERTS, Inc. Account.

**Charge Me Later:** Charge per my CalCERTS Invoice Agreement:

**CURRENT AGREEMENT:** This transaction TOTAL will be added to your **Batch**  invoicing that will be automatically charged against your credit card on file at close of day.



**Pay on Account:** Deduct total from the Credit Account of CalCERTS, Inc..

- Note:** You can proceed with inputting the remaining CF2Rs by Clicking **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.

Merged Official Documents	
All Completed Official Documents	    E-Mail Documents

## Residential Alterations

- Click the **Projects**  located in the menu on the left.
- Click the **Alterations- Residential** [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:

**Create Alteration Project**

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


**IF YOU HAVE A PERMIT ALREADY**


What is your PERMIT APPLICATION DATE?

2019 Energy Standards Code Year is effective 1/1/2020  
2016 Energy Standards Code Year is effective 1/1/2017  
2013 Energy Standards Code Year is effective 7/1/2014


**IF YOU DO NOT HAVE A PERMIT ALREADY**






**QUICK LINKS**

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

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

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

- 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 <i>CF1R-ALT-01 (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan)</i>		
- Prescriptive Residential Alterations (Space Conditioning Systems) <i>CF1R-ALT-02</i> <i>This is the most common project type for HVAC systems</i> <i>Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.</i>		
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to <a href="#">New Construction</a> .		
- 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  .

> STEP 1 / STEP 2 / STEP 3 / STEP 4

**A. GENERAL INFORMATION** NEXT

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

Project Name

Street Address

Zip Code

City

Enforcement Agency / Building Department

Building Type

Square Footage

Climate Zone

Number of space conditioning (SC) systems

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

NEXT

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

STEP 1 / > STEP 2 / STEP 3 / STEP 4

**B. Space Conditioning (SC) System Information** NEXT

**SC System 1**

01 System Name

02 System Area Served

03 Floor Area served by System

04 Is the SC system a ducted system?

05 Installing a refrigerant containing component?

06 Installing new SC System components?

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

08 Installing entirely new duct system?

09 Installing entirely new SC system?

BACK 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.

STEP 1 / STEP 2 / > STEP 3 / STEP 4

**SYSTEM EXEMPT** NEXT

01 SC System ID/Name

02 SC System Description of Area Served

BACK NEXT

- 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**.

**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:

- 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.

FINAL REVIEW SUBMIT

**A. GENERAL INFORMATION**

Installing Contractor:	DEV INSTALLERS & (137345)	Enforcement Agency:	City of CalCERTSville
01 Project Name:	Natomia Residence	02 Date Prepared:	2019-09-26
03 Project Location:	31 Natoma	04 Building Type:	SF
05 CA City:	CalCERTSville	06 Dwelling Unit Name:	Natomia Residence
07 Zip Code:	00000	08 Dwelling Unit CFA (ft2):	1200
09 Climate Zone:	1	10 Number of SC Systems:	1

**B. Space Conditioning Information**

SC System ID/Name	SC System Location or Area Served	CFA served by this SC System (ft2)	Is the SC system a ducted system?	Installing a refrigerant containing component?	Installing new SC System components?	Installing more than 40 feet of ducts?	Installing entirely new duct system?	Installing entirely new SC system?	Alteration Type
System 1	Location 1	1200	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	System is exempt from the alteration requirements

**AUTOMATICALLY TRANSFER TO A HERS RATER**  
If you would like to automatically send out a Transfer Request to a Rater upon registration of this project, please select from list:


**DOCUMENTATION AUTHOR**

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

**RESPONSIBLE PERSON**

Responsible Company Name:   
Responsible Designer Name:   
License:


BACK SUBMIT

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

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

Plan ID: 2741113  
CEC Registration #: 219-A020209117A

**Prescriptive CF1Rs**

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

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


[Approve PDFs](#)


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

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


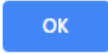

Plan ID: 2741113  
CEC Registration #: 219-A020209117A

**Prescriptive CF1Rs**

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

- 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** .
  - Permit Number and Permit Date.
  - Home Owner's name and phone number.
- Click **OK**  to confirm the information has been Saved.
  - Note:** The company controlling the project can Click **Edit**  if needing to modify the project home information available for edit.





- Click directly on the CF2R 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.

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF3R Status
1618023	RTM Test Cas	1886557	System 1	31Natoma St		T24: Working <a href="#">[View PSB]</a>	T24: Complete <a href="#">[View PSB]</a>

System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Document	Document Status <a href="#">Claim Documents</a>	Documentation Author	Responsible Person
		Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01	Not Started	<a href="#">Report Results</a>				

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

**RESPONSIBLE PERSON**

Responsible Company Name:

Responsible Builder/Installer Name:

Position With Company:

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**QUICKPAY**

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

There will be a \$1.00 charge for this registration.

If you wish to **QUICKPAY** for this certificate, check this box:  
 I, **Johnny Installer**, authorize CalCERTS to apply the total of **\$1.00** against my DEV INSTALLERS & Account.

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

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


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





On Submission Go To:


- 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.

**On Form Submission Go To:**

CF2R Launch Page

- Click the **Submit** link .
  - 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** .
  - Note:** Click the PDF  icon to review any documents before approving them.
- Click the **check boxes**  [Check to Select](#) to the right of the CF2Rs located under Document Status.

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF3R Status		
1354945	Natoma Residence	1627599	System 1	31 Natoma		T24- Working <a href="#">[View PDF]</a>	T24- Working <a href="#">[View PDF]</a>		
<p>*** ALERT *** There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the 'Check to Select' box, you are certifying that the content in the PDF is complete and accurate. Click 'Approve PDFs' to approve all documents that you have selected with 'Check to Select' box.</p> <p><input type="button" value="Select All PDF Documents to Sign"/> <input type="button" value="Approve PDFs"/></p> <p><a href="#">[TAB VIEW]</a></p>									
System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
		Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01	PDF Needs Approval 		<a href="#">Download</a>  <a href="#">Refresh PDF</a>	<input checked="" type="checkbox"/> Check to Select	Johnny Installer (DEV INSTALLERS &)	Johnny Installer (DEV INSTALLERS &)
4549269	System 1	Refrigerant Charge	CF2R-MCH-25	PDF Needs Approval 	<a href="#">CEIR</a>	<a href="#">Download</a>  <a href="#">Refresh PDF</a>	<input checked="" type="checkbox"/> Check to Select	Johnny Installer (DEV INSTALLERS &)	Johnny Installer (DEV INSTALLERS &)
<p>*** ALERT *** There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the 'Check to Select' box, you are certifying that the content in the PDF is complete and accurate. Click 'Approve PDFs' to approve all documents that you have selected with 'Check to Select' box.</p> <p><input type="button" value="Select All PDF Documents to Sign"/> <input type="button" value="Approve PDFs"/></p>									

- Click **Approve PDFs** link .
- 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**.

[\[NO TABS\]](#)

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



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

The transaction is completed.

An e-mail has been sent to [jinstaller@calcerts.com](mailto:jinstaller@calcerts.com). You may also print this page as a receipt.

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


**Credit Account Information**

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

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

- 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.

Project ID	Project Name	Address	System Name	City	Zip	Group	Sample
371101	42031 VILLAGE 42	JEANNINE & STEVEN RYAN	SYSTEM 1	Camarillo	93012		<input checked="" type="checkbox"/>
373990	850 COLD CANYON RD	LINDA KOVAR	SYSTEM 1	Calabasas	91302		<input type="checkbox"/>


- Click the **NEXT** link [NEXT](#).

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

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

- Click the **CREATE GROUP** link [CREATE GROUP](#).
- 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 [Report Results](#) located to the right of the CF3R you would like to submit.
- Input CF3R Results; Click **NEXT** [NEXT](#) or **BACK** [BACK](#) to navigate through the pages.
- On the final page, Click the drop down to select the **Responsible Rater Name** and **Company Name**.

**QUICKPAY**

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

There will be a **\$24.00 charge for this registration (Includes a one time base fee per Responsible Rating Company for each system)**.

If you wish to **QUICKPAY** for this certificate, check this box:  
 I, **Johnny Installer**, authorize CalCERTS to apply the total of **\$24.00** against my DEV INSTALLERS & Account.

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

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

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

**On Form Submission Go To:**  
 CF3R Launch Page

- **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.

**On Form Submission Go To:**

CF3R Launch Page

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

Project/Lot ID	System	Sample Group	Overall CF2R Status	Overall CF3R Status
1618023-1886557	RTM Test Cas - System 1		T24: Working (View PSR)	T24: Working (View PSR)

**[TAB VIEW]**



Features of Project Systems being reported:

System ID	System	Tested Feature	Form Name	CF2R Status	CF3R Status	Next Step	Document	Document Status	Documentation Author	Responsible RATER
6097848-1	System 1 - Location 1	Duct Leakage	CF3R-MCH-20	DONE	Complete	Payment Required	<input type="button" value="\$"/>	Claim Documents	Johnny Installer (DEV INSTALLERS &)	Johnny Rater (John Rater's HVAC)
6097848-1	System 1 - Location 1	Airflow	CF3R-MCH-23	DONE	Not Started	<input type="button" value="Report Results"/>				
6097848-1	System 1 - Location 1	Fan Efficacy	CF3R-MCH-22	REQUIRED	Not Started	Complete MCH23 or MCH28 First				

- **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**.

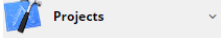
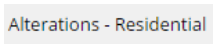

**[NO TABS]**

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

- **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account, you will see an additional option to **Pay On Account**.
- Click the **check box**  Check to Select located under Document Status.
- Click **Approve PDFs**  .
  - **Note:** Click the PDF  icon to access the official registered CF3Rs.
  - **Note:** All documents can be downloaded or emailed using the links at the top of the screen.   E-Mail Documents

## 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:

**Create Alteration Project**

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

**IF YOU HAVE A PERMIT ALREADY**

What is your PERMIT ISSUE DATE?  
04/15/2019  NEXT

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

**IF YOU DO NOT HAVE A PERMIT ALREADY**

[CLICK HERE](#)

**QUICK LINKS**

[CLICK HERE](#) for 2019 Energy Standards Code Year

[CLICK HERE](#) for 2016 Energy Standards Code Year Using Fast-Track

[CLICK HERE](#) for 2016 Energy Standards Code Year





[FAST-TRACK USER'S GUIDE](#)

[CLICK HERE](#) for 2013 Energy Standards Code Year

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

**Create Alteration Project**

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

Project Type	2019 Code Standards
- Prescriptive Residential Alterations <i>CF1R-ALT-D1 (Whole House)</i>	
- Prescriptive Residential Alterations (Space Conditioning Systems) <i>CF1R-ALT-D2</i> <i>This is the most common project type for HVAC systems</i> <i>Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.</i>	
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to <a href="#">New Construction</a> .	
- Consumer Certificate (Only for HERS Verification - DO NOT USE THIS OPTION IF YOU NEED A CF1R OR NEED TO REGISTER CF2Rs)	

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

**Create New 2019 Performance Approach E+A+A Project**


Project Name:

Street Address:

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

City:

Enforcement Agency / Building Department:

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

NOTE: For projects that consist of HVAC alterations/changeouts ONLY, and NO OTHER building alterations - use the [CF1R-ALT-D2 form](#).

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

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

www.calcerts.com says

Project Created.

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

Performance CF1R

Plan ID: 1153568

CEC Registration #: 216-A0100117A-00000000-0000

No file chosen

Please select an Energy Calculation file to upload.

- Locate the .xml file and Click the **Save Changes** link  .
  - **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.*

File Uploaded!

Performance CF1R

Plan ID: 3019067

CEC Registration #: 220-P010178097A-000-000-00000000-0000

DRAFT CF1R Document: 

**DOCUMENTATION AUTHOR - Alert: Needs Signature**

Documentation Author: \_\_\_\_\_

Documentation Author Company: \_\_\_\_\_

CEA/HERS Certification Identification: \_\_\_\_\_

Signed On: \_\_\_\_\_

**RESPONSIBLE DESIGNER - Alert: Needs Signature**

Responsible Designer Name: \_\_\_\_\_

Responsible Designer Company Name: \_\_\_\_\_

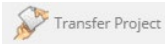

Designer's License: \_\_\_\_\_


Signed On: \_\_\_\_\_

**PROJECT REQUIRES CF3R-EXC-20 COMPLETION**

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

- **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  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** [My Raters](#) link.
  - **Note:** The check box, in order to maintain shared access, will automatically be checked.
- Click **Transfer** .

 **Project Transfer: RTM EAA**

**Authorized Companies to Transfer:**

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

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

Check this box if you wish to receive an E-Mail notification when the Project has been accepted or not.

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

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

**Project Transfer Result:**  
 Transfer Request Status:  
**Project:** [RTM EAA \(ID: 1618141\)](#)  
**From:** DEV INSTALLERS &  
**To:** John Rater's HVAC


**Request is still open. Waiting for [John Rater's HVAC](#) to accept.**

To view any other Open Requests:


Return to the Project Home Page for RTM EAA


- 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**.

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

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




 Please select the CF3Rs to complete below.

Project Systems being reported:						
Project ID	Project Name	Lot ID	Address	Sample Group	Overall CF2R Status	Overall CF3R Status
312338	Main Residence	824108	31 Nazama St (System 1)		T24: Working	T24: Working


  



Linked Project(s)						
Project ID	Project Name	System Name				
312338	Main Residence	System 2				

[TAB VIEW](#)

Features of Project Systems being reported:									
Tested Feature	Form Name	Tested System	CF2R Status	CF3R Status	Next Step	Document	Document Status	Documentation Author	Responsible RATER
Existing Conditions	CF3R-EXC-20	31 Nazama St (System 1)	N/A	Complete 	Payment Required			Johnny Rater (CalCERTS, Inc.)	Johnny Rater (CalCERTS, Inc.)

FAQ and MW: [CF3R-MCH-27](#) | [31 Nazama St \(System 1\)](#) | [RESUBMIT](#) | Not Started | Complete all CF2Rs first.

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



 Please select the CF3Rs to complete below. 

Systems being Reported:						
Project/Lot ID	System	Sample Group	Overall CF2R Status	Overall CF3R Status		
1818141-1886213	RTM EAA - System 1		T24: Working <a href="#">[View PSR]</a>	T24: Working <a href="#">[View PSR]</a>		

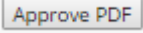

**\*\*\* ALERT \*\*\*** There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the "Check to Select" box, you are certifying that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

[Select All PDF Documents to Sign](#) | [Approve PDFs](#)

[TAB VIEW](#)

Features of Project Systems being reported:										
System ID	System	Tested Feature	Form Name	CF2R Status	CF3R Status	Next Step	Document	Document Status	Documentation Author	Responsible RATER
	Existing Conditions	CF3R-EXC-20	N/A	Complete 	PDF Needs Approval	<a href="#">Download</a>	<input checked="" type="checkbox"/> Check to Select	<a href="#">Claim Documents</a> 	Johnny Rater (john Rater's HVAC)	Johnny Rater (john Rater's HVAC)

[Refresh PDF](#)

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

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

Select Signing Options Below:

**DOCUMENTATION AUTHOR**

Assign Documentation Author: Use this option to assign SOMEONE ELSE to sign as Documentation Author

-OR-

I want to SIGN as the Documentation Author: Use this option if YOU want to sign as Documentation Author

**RESPONSIBLE PERSON**

Assign Responsible Person: Use this option to assign SOMEONE ELSE to sign as Responsible Person

-OR-

I want to SIGN as the Responsible Designer: Use this option if YOU want to sign as Responsible Person

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

**RESPONSIBLE PERSON**

Assign Responsible Person: Use this option to assign SOMEONE ELSE to sign as Responsible Person

TBD

Designer's License:  *(required)*

Check this box if you would like to automatically notify this person to sign via E-Mail Notification.

- 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.

Select Signing Options Below:

**DOCUMENTATION AUTHOR**

Assign Documentation Author: Use this option to assign SOMEONE ELSE to sign as Documentation Author

TBD

CEA/HERS Certification Identification:  *(optional)*

-OR-

I want to SIGN as the Documentation Author: Use this option if YOU want to sign as Documentation Author

**RESPONSIBLE PERSON**

Assign Responsible Person: Use this option to assign SOMEONE ELSE to sign as Responsible Person

TBD

Designer's License:  *(required)*

Check this box if you would like to automatically notify this person to sign via E-Mail Notification.

-OR-



I want to SIGN as the Responsible Designer: Use this option if YOU want to sign as Responsible Person


- 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.



## Performance CF1R

Plan ID:	3019067
CEC Registration #:	220-P010178097A-000-000-0000000-0000
Official CF1R Document:  	
<a href="#">Energy Calculation File</a>   <a href="#">Tests</a>   <a href="#">System Names</a>   <a href="#">Sign Off</a>	
<b>DOCUMENTATION AUTHOR - Signed</b>	
Documentation Author:	Johnny Rater
Documentation Author Company:	John Rater's HVAC
CEA/HERS Certification Identification:	
Signed On:	2020-09-24 11:58:22
<b>RESPONSIBLE DESIGNER - Signed REMOVE SIGNATURE</b>	
Responsible Designer Name:	Johnny Rater
Responsible Designer Company Name:	John Rater's HVAC
Designer's License:	lkm
Signed On:	2020-09-24 11:58:22
<a href="#">Save Changes</a>	

- **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.

**\*\*\* ALERT \*\*\*** - What's next? Before you can move on to the CF2Rs, you need to provide the [Primary Installer and Permit Number](#) information.

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

Item	Current	New
Installer CSLB:	Dev installers (137345)	137345 <input type="checkbox"/> Check this box if this is for a Homeowner installed Project
Project Name:	RTM EAA 2 - System 1 (ID: 1619208)	RTM EAA 2
Project Address:	31Natoma St	31Natoma St
Project City:	CalCERTSVille	CalCERTSVille
Project Zip:	00000	00000
Enforcement Agency / Building Department:	County of CalCERTS	CalCERTS (County)
Permit Number:	231423	231423
Permit Date:	06/06/2019	06/06/2019

[SAVE](#)

- **Note:** The Next Step is to complete the required certificates of installation.



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

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

Please select the CF2Rs to complete below.

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF2R Status
1130962	Natomia Residence EAA	128431	System 1	91 Natomia Street		T24-Working <a href="#">View PDF</a>	T24-Complete <a href="#">View PDF</a>

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

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

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

**RESPONSIBLE PERSON**

Responsible Company Name

Responsible Builder/Installer Name

Position With Company

---

**QUICKPAY**

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

There will be a \$1.00 charge for this registration.

If you wish to **QUICKPAY** for this certificate, check this box:  
 I, **Johnny Installer**, authorize CalCERTS to apply the total of **\$1.00** against my DEV INSTALLERS & Account.

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

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

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

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

On Submission Go To:


[SUBMIT](#)

- 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.

**On Form Submission Go To:**

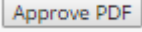

[SUBMIT](#)

- 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.



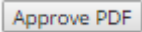

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF3R Status		
1384945	Natoma Residence	1627599	System 1	31 Natoma		T24: Working <a href="#">View PSR</a>	T24: Working <a href="#">View PSR</a>		
<p>*** ALERT *** There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the 'Check to Select' box, you are certifying that the content in the PDF is complete and accurate. Click 'Approve PDFs' to approve all documents that you have selected with 'Check to Select' box.</p> <p><a href="#">Select All PDF Documents to Sign</a> <a href="#">Approve PDFs</a></p> <p><a href="#">TAB VIEW</a></p>									
System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
		Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01	PDF Needs Approval		<a href="#">Download</a> <a href="#">Refresh PDF</a>	<input type="checkbox"/> Check to Select	Johnny Installer (DEV INSTALLERS &)	Johnny Installer (DEV INSTALLERS &)
4549269	System 1	Refrigerant Charge	CF2R-MCH-25	PDF Needs Approval	CF3R	<a href="#">Download</a> <a href="#">Refresh PDF</a>	<input type="checkbox"/> Check to Select	Johnny Installer (DEV INSTALLERS &)	Johnny Installer (DEV INSTALLERS &)
<p>*** ALERT *** There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the 'Check to Select' box, you are certifying that the content in the PDF is complete and accurate. Click 'Approve PDFs' to approve all documents that you have selected with 'Check to Select' box.</p> <p><a href="#">Select All PDF Documents to Sign</a> <a href="#">Approve PDFs</a></p>									

- Click **Approve PDF** .
- Click the **PDF** icons  to access the Official Certificate and close once complete.
  - Note:** Next step is to input the CF3Rs.


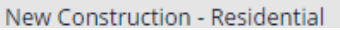





















- Click directly on the **CF3R** icon located at the top of the Project Home page.
- Click the **Report Results** link [Report Results](#) located to the right of the CF3R you would like to submit.
- On the final page click the drop down to select the **Responsible Rater Name** and **HERS Company Name**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

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

- Note:** Next you can input any remaining CF3Rs by Clicking [Report Results](#).
- Click the **Pay** icon .
- Follow the prompts in the shopping 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** .
- 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) <i>Note - these type of projects ARE NOT FOR HOMEOWNERS.</i> <i>Performance Calculation File ONLY ?</i>						
- Single Family Residence (SFR) - Custom Home - SINGLE BUILDING (Single Address, Single Orientation, Single Lot, etc) <i>Performance Calculation File or Prescriptive CF1R-NCB-01 ?</i>						
- Single Family Residence (SFR) - SINGLE ADDRESS <b>ADDITION ONLY</b> <i>Performance Calculation File or Prescriptive CF1R-ADD-01 ?</i>	N/A	N/A				

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

**New 2019 New Construction SINGLE FAMILY RESIDENCE SINGLE ADDRESS Project**

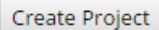
Project Name:

Project Type:

Zip Code:  Required before ANY CF1R can be issued.

Default Gas Utility:

Default Electric Utility:

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

**2019 New Construction SINGLE FAMILY Multi and/or Single Orientation Project**

Energy Standards Code Year: 2019

Company Controlling Project: John Rater's HVAC

Project Name: RTM SF NC

Region: N/A

Project Type: Single Family Residence (Multi and/or Single Orientation)

Builder:  NOTE: Homeowners cannot be a Builder for Multi-Orientation Projects.

Builder Contact Name:

Builder Contact Phone:

Zip Code: 00000

Project Address 1:

Project Address 2:

Project City:

Enforcement Agency / Building Department:

Default Gas Utility:

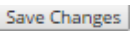
Default Electric Utility:

Project Superintendent:



Contact Phone Number:

Status:

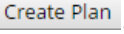
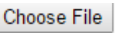
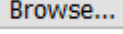
Block MCH-25 Weigh-In Option for Entire Project?:

- **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.

Plan Name: <i>(Please do not use double or single quotes in the name)</i>	<input type="text" value="Testing"/>
Gas Utility:	<input type="text" value="None"/> ▼
Electric Utility:	<input type="text" value="None"/> ▼
OTHER PROVIDER REGISTRATION:	Check this box if this plan is being transferred from another HERS Provider: <input type="checkbox"/> This Plan File is from another HERS Provider. Registration Number: <input type="text"/> <i>Must be in proper format. For example: 116-P010000105A</i>
<input type="button" value="Create Plan"/>	

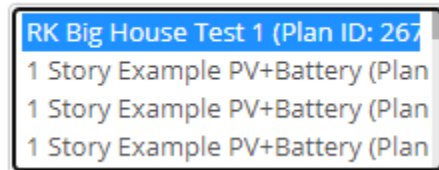
- **Note:** **OTHER PROVIDER REGISTRATION** only applies if the plan is being transferred from another HERS Provider.
- Click the **Create Plan** link .
- Click the Performance CF1R: Click Here link. **PERFORMANCE CF1R: [\[CLICK HERE\]](#)** in order to upload a new Energy Calculation file.
- Click the 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.

<b>What Certifications will this plan be needing?</b> Please select any additional certifications that you wish this file to qualify for: <input checked="" type="checkbox"/> Compliance <input type="checkbox"/> Energy Star <input type="checkbox"/> I certify that this plan meets the Energy Star requirement of being at least 15% better than the <b>California 2008 Building Energy Efficiency Standards</b> . <input type="checkbox"/> CAHP
<input type="button" value="Upload File"/>

- 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.




**Select plan to be transferred**



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

Press 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.

Select Signing Options Below:

**DOCUMENTATION AUTHOR**

Assign Documentation Author: Use this option to assign SOMEONE ELSE to sign as Documentation Author

-OR-

I want to SIGN as the Documentation Author: Use this option if YOU want to sign as Documentation Author  
Johnny Rater (John Rater's HVAC)  
My CEA/HERS Certification Identification:  (optional)

**RESPONSIBLE PERSON**

Assign Responsible Person: Use this option to assign SOMEONE ELSE to sign as Responsible Person

-OR-

I want to SIGN as the Responsible Designer: Use this option if YOU want to sign as Responsible Person  
Johnny Rater (John Rater's HVAC)  
My Designer's License:  (required)




- **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.
- 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.


2019 New Construction SINGLE FAMILY Single Orientation Project	
Energy Standards Code Year:	2019
Company Controlling Project:	John Rater's HVAC
Project Name:	<input type="text" value="RTM SA SF"/>
Region:	N/A
Project Type:	Single Family Residence (Single Orientation)
Builder:	<input type="text" value="--- SELECT FROM LIST ---"/> <small>NOTE: Homeowners cannot be a Builder for Multi-Orientation Projects.</small>
Builder Contact Name:	<input type="text"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Builder Contact Phone:	<input type="text"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Zip Code:	<input type="text" value="00000"/>
Project Address 1:	<input type="text"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Project Address 2:	<input type="text"/>
Project City:	<input type="text" value="--- SELECT FROM LIST ---"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Enforcement Agency / Building Department:	<input type="text" value="--- SELECT FROM LIST ---"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Default Gas Utility:	<input type="text" value="None"/>
Default Electric Utility:	<input type="text" value="None"/>
Project Superintendent:	<input type="text"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Contact Phone Number:	<input type="text"/> <small>Required before ANY CF2R Certificate can be issued.</small>
Status	<input type="text" value="Active"/>
Block MCH-25 Weigh-In Option for Entire Project?	<input type="text" value="No"/>
<input type="button" value="Save Changes"/>	


- 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.



- **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.




 Edit Lot for RTM SA SF (1619231)

Phase:	Start a new Phase with this lot	
Lot Label:	<input type="text"/>	<small>This is typically the lot number.</small>
Address:	<input type="text"/>	
Zip:	95630	
City:	Folsom	
State:	CA	
Permit Number:	<input type="text"/>	<small>Required before any CF2Rs can be done.</small>
Number of Kitchens:	1	<small>Required before any CF2Rs can be done.</small>
Plan:	Select a Plan	
Gas Utility:	None	
Electric Utility:	None	
Default Rater:	Select Default Rater	<a href="#">Manage Default Raters</a>
Block MCH-25 Weigh-In Option? 	No	
Is this the Model Home for the plan (Initial Test)?	<input type="button" value="No"/>	
<b>SUPPLEMENTAL CF2Rs</b>		
<small>Indicate which additional CF-2Rs are needed.</small>		
CF2R-PLB-03	Pool and Spa	<input type="button" value="No"/>
<input type="button" value="Add Lot"/>		


- Click **Add Lot** 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 .
- 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** .
- 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**.





Please select the sampling type to work with Barnes Residence



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

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

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

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

ID	Lot Name	Phase	Plan	Permit	Address	City	Zip	Sample	Address
78188	Lot 22	Phase 1	Plan 101	15-0336	459 Heider Grove Court	Tulare	93274		
832291	Lot 31	Phase 1	Plan 100	15-0336	450 Heider Grove Court	Tulare	93274		
832292	Lot 32	Phase 1	Plan 100	15-0472	472 Heider Grove Court	Tulare	93274		
78189	Lot 23	Phase 1	Plan 104	15-0471	460 Heider Grove Court	Tulare	93274		

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

ID	Lot Label	Address	City	Zip	Group	Sample
78188	Lot 22	459 Heider Grove Court	Tulare	93274		<input type="button" value="No"/>
832291	Lot 31	450 Heider Grove Court	Tulare	93274		<input type="button" value="No"/>
832292	Lot 32	472 Heider Grove Court	Tulare	93274		<input type="button" value="No"/>

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

Tested Features:  
 - Dust Leakage **544324** - CENTRAL AIR CONDITIONING INC  
 - Refrigerant Charge **544324** - CENTRAL AIR CONDITIONING INC  
 - Reset Equipment **544324** - CENTRAL AIR CONDITIONING INC  
 - IQC and MV **544324** - CENTRAL AIR CONDITIONING INC  
 - Airflow **544324** - CENTRAL AIR CONDITIONING INC  
 - Fan Efficiency **544324** - CENTRAL AIR CONDITIONING INC

The following addresses will be associated to the above group:

ID	Lot Label	Address	City	Zip
78188	Lot 22	459 Heider Grove Court	Tulare	93274

- Click **OK** to confirm group has been created.
- **Create an Open Sample Group.**
  - To create the Open Group, each of the five dwelling units must have been installed and self-tested by the same contractor, 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.

Please select the sampling type to work with Barnes Residence

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

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

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

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

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

ID	Lot Name	Phase	Plan	Permit	Address	City	Zip	Sample Group	Sample Size	Actions
83245	<a href="#">Lot 30</a>	Phase 1	Plan 438 - Windsor	14-03803	2087 Emerald Bay	Tulane	93274	215-01458	5	Sample Limit Reached
710103	<a href="#">Lot 07</a>	Phase 1	Plan 1204	15-04707	2537 Emerald Bay Avenue	Tulane	93274	215-02208	4	<input checked="" type="radio"/>
78192	<a href="#">Lot 31</a>	Phase 1	Plan 438 - Windsor	15-04845	2545 Emerald Bay Avenue	Tulane	93274			<input type="radio"/>
78198	<a href="#">Lot 22</a>	Phase 1	Plan 105	15-05306	400 Nelder Drive Court	Tulane	93274			<input type="radio"/>
832291	<a href="#">Lot 31</a>	Phase 1	Plan 1004	15-05306	400 Nelder Drive Court	Tulane	93274			<input type="radio"/>
832292	<a href="#">Lot 32</a>	Phase 1	Plan 1003	15-04872	472 Nelder Drive Court	Tulane	93274			<input type="radio"/>

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

**Tested Features:**  
 Duct Leakage **544324** - CENTRAL AIR CONDITIONING (INC)  
 Refrigerant Charge **544324** - CENTRAL AIR CONDITIONING (INC)  
 Retail Equipment **544324** - CENTRAL AIR CONDITIONING (INC)  
 IQG and MV **544324** - CENTRAL AIR CONDITIONING (INC)  
 Junction **544324** - CENTRAL AIR CONDITIONING (INC)  
 Fan Efficiency **544324** - CENTRAL AIR CONDITIONING (INC)

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

ID	Lot Label	Address	City	Zip	Group	Sample
78198	Lot 22	400 Nelder Grove Court	Tulane	93274		<input type="button" value="No"/>
832291	Lot 31	400 Nelder Grove Court	Tulane	93274		<input type="button" value="No"/>
832292	Lot 32	472 Nelder Grove Court	Tulane	93274		<input type="button" value="No"/>

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

**Tested Features:**  
 Duct Leakage **544324** - CENTRAL AIR CONDITIONING (INC)  
 Refrigerant Charge **544324** - CENTRAL AIR CONDITIONING (INC)  
 Retail Equipment **544324** - CENTRAL AIR CONDITIONING (INC)  
 IQG and MV **544324** - CENTRAL AIR CONDITIONING (INC)  
 Junction **544324** - CENTRAL AIR CONDITIONING (INC)  
 Fan Efficiency **544324** - CENTRAL AIR CONDITIONING (INC)

The following addresses will be associated to the above group:

ID	Lot Label	Address	City	Zip
78198	Lot 22	400 Nelder Grove Court	Tulane	93274

- 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.


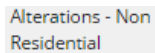

- After any form in the Registry is submitted and signed it can be processed for payment. Payment is required before the form can be printed. Payment may be made by any user who has access to the Project.



- 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  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.


Project Home (ID: 0)

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

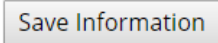

- Click Create Project .
- Click OK  to confirm your project has been created.
- Input all Required information on the Project Home page such as **Project Address**, **Permit Number**, **Permit Date** and **Installer information**.

Project Information (Non-Res Alteration)	
Energy Standards Code Year:	2019
Company Controlling Project:	John Rater's HVAC
Project Name:	<input type="text" value="RTM NON-Res ALT"/>
Zip Code:	<input type="text" value="00000"/>
Project Address:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project City:	<input type="text" value="--- SELECT FROM LIST ---"/> <small>▼</small>
Enforcement Agency / Building Department:	<input type="text" value="--- SELECT FROM LIST ---"/> <small>▼</small>
Permit Number:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Permit Date:	<input type="text"/> <small>Date must be no greater than today and is required before ANY NRCV Certificate can be issued.</small>
Utility - GAS:	<input type="text" value="None"/> <small>▼</small>
Utility - ELECTRICITY:	<input type="text" value="None"/> <small>▼</small>
Project Construction Manager:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Contact Phone Number:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
NRCV-MCH information	
NRCV-MCH Installer CSLB: <small>Enter 0 if installed by owner</small>	<input type="text" value="137345"/> <small>Must be a valid whole number, no decimals</small>
NRCV-MCH Installer Company Name:	Dev installers
Installer Contact Name:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Installer Contact Phone:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project Status:	<input type="text" value="Active"/> <small>▼</small>
<input type="button" value="SAVE"/>	

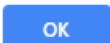
- Click SAVE .




- 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.**

ID	HVAC System Identification or Name	System Location or Area Served	System Type	Action
1580198	System 001			
1580199	System 002			




- Click Save Information 
- Click green add  Action icon to **Add Addition Systems.**
- Input how many Systems would you like to add

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

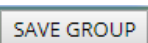
- Click Sample  icon in the project road map located at the top of the page.
- Click the **HVAC Systems** for the group by selecting default No  to Yes  .



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

ID	System Name	System Location or Area Served	System Type	Group	Group Size	Select
1715499	System 001	1000	HVAC			
1716652	System 002	1000	HVAC			
1716653	System 003	1000	HVAC			

- Click NEXT  .

ID	System Name	System Location or Area Served	System Type	Group
1715499	System 001	1000	HVAC	
1716652	System 002	1000	HVAC	
1716653	System 003	1000	HVAC	

Select Sample Group Number:  

- 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.





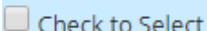
Project ID	Project Name	Lot ID	Address	Sample Group	Project Info Complete
91521	The Shop	107943	31 Napa Street System 11		Yes




Features of Project Systems being reported:

Tested Feature	Form Name	Tested System	Status	Next Step	Unmet	Document	Document Status	Documentation Author	Responsible Person
Duct Leakage	NRCV-MCH-04	31 Napa Street System 11	Not Started	Report Results	N/A				

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

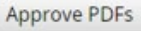

RESPONSIBLE PERSON	
Responsible Rater Name	Rater, Johnny (USR999999) ▼
HERS Rater Company Name	CalCERTS, Inc. ▼

- 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.

ID	System Name	Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
1715499	System 001	Duct Leakage	NRCV-MCH-04	(System 001)	Complete 	Done	<a href="#">Download</a>  <a href="#">Refresh PDF</a> 	<input type="checkbox"/> Check to Select	Johnny Rater (john Rater's HVAC)	Johnny Rater (john Rater's HVAC)

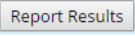
\*\*\* ALERT \*\*\* There are PDF documents ready for review and approval. Please download the PDFs and review them for completeness and accuracy. If the information is NOT correct, click on the RESUBMIT link to correct the information. By checking the 'Check to Select' box, you are certifying that the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

Select All PDF Documents to Sign




- 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




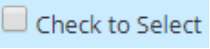
- Click NRCV icon for Non-Residential Certificates of Verification.
- Click the Report Results link 
- Input results and Click the drop down to select the **Responsible Rater Name** and **Company Name**.

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

- Click the SUBMIT link 
- Click OK  to confirm your NRCV-MCH-04 has been certified.
- Click the Pay icon .
- Follow the prompts in the shopping cart to proceed with payment.
- Choose the appropriate payment type.
  - **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account, you will see an additional option to **Pay On Account**.




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

- **Note:** Click the PDF  icon to review any documents before approving them.
- **Note:** Users must sign the NRCV form for each project.

- Click the **check boxes**  to the right of the NRCV form located under Document Status.

Project ID	Project Name	Lot ID	Address	Sample Group	Project Info Complete
707050	The Shop	254035	31 Natoma (System 1)		Yes

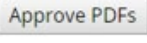

Features of Project Systems being reported:

Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
Duct Leakage	NRCV-MCH-04	31 Natoma (System 1)	Completed 	Done	<a href="#">Click To Download</a> SROV.XML  	<input type="checkbox"/>	Johnny Rater (CalCERTS, Inc.)	Johnny Rater (CalCERTS, Inc.)

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

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

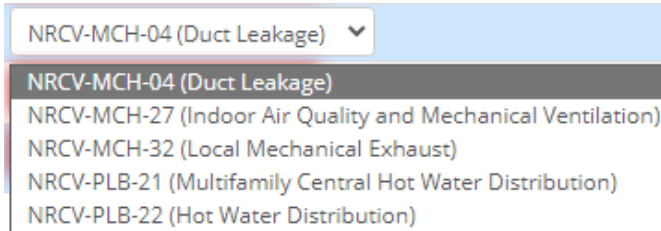
Approve PDF

- 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

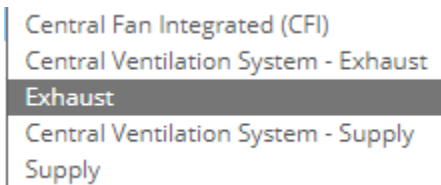
CalCERTS supports Non-Residential Verifications forms. The following NRCV forms are certified through the registry NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-21 and NRCV-PLB-22. These forms are listed as the type of project dropdown when creating the project.



A screenshot of a dropdown menu. The selected option is "NRCV-MCH-04 (Duct Leakage)". Other options listed are "NRCV-MCH-27 (Indoor Air Quality and Mechanical Ventilation)", "NRCV-MCH-32 (Local Mechanical Exhaust)", "NRCV-PLB-21 (Multifamily Central Hot Water Distribution)", and "NRCV-PLB-22 (Hot Water Distribution)".

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 must be completed if C**




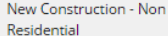

A screenshot of a dropdown menu. The selected option is "Exhaust". Other options listed are "Central Fan Integrated (CFI)", "Central Ventilation System - Exhaust", "Central Ventilation System - Supply", and "Supply".

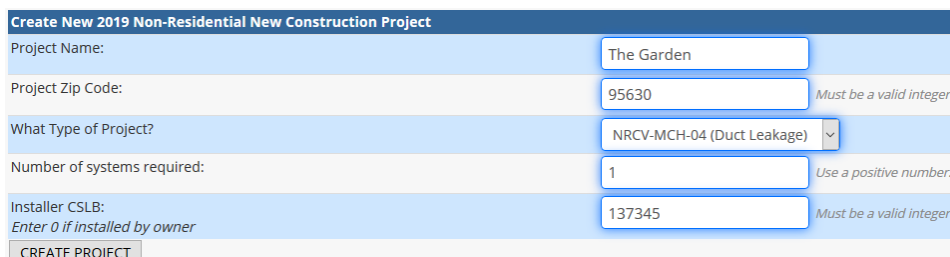
The NRCV-MCH-24 is accessed by clicking the link from inside the NRCV-MCH-27.

[CLICK HERE to Register NRCV-MCH-24](#)

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  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 systems and the Installer CSLB.




A screenshot of a form titled "Create New 2019 Non-Residential New Construction Project". The form has the following fields:



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

At the bottom of the form is a button labeled "CREATE PROJECT".

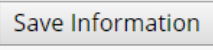

- Click CREATE PROJECT [CREATE PROJECT](#).

- 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**.


Project Information (Non-Res Alteration)	
Energy Standards Code Year:	2019
Company Controlling Project:	John Rater's HVAC
Project Name:	RTM NON-Res ALT
Zip Code:	00000
Project Address:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project City:	--- SELECT FROM LIST ---
Enforcement Agency / Building Department:	--- SELECT FROM LIST ---
Permit Number:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Permit Date:	<input type="text"/> <small>Date must be no greater than today and is required before ANY NRCV Certificate can be issued.</small>
Utility - GAS:	None
Utility - ELECTRICITY:	None
Project Construction Manager:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Contact Phone Number:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
NRCV-MCH Information	
NRCV-MCH Installer CSLB: <small>Enter 0 if installed by owner</small>	137345 <small>Must be a valid whole number, no decimals</small>
NRCV-MCH Installer Company Name:	Dev Installers
Installer Contact Name:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Installer Contact Phone:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project Status:	Active
<input type="button" value="SAVE"/>	


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



ID	HVAC System Identification or Name	System Location or Area Served	System Type	 Action
1715489	System 001	1000	HVAC	

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

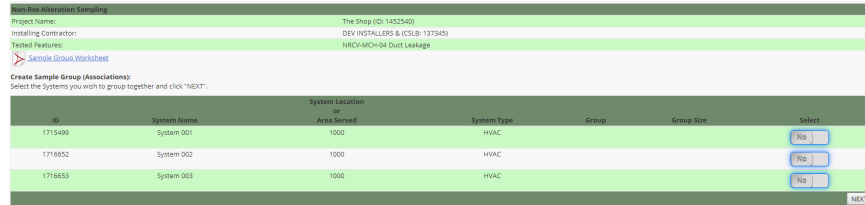
How many Systems would you like to add?

- 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.



Non-Residential Sampling

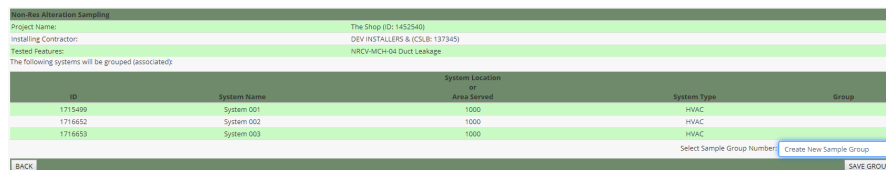
Project Name: The Shop (ID: 1452340)  
 Installing Contractor: DEV INSTALLERS & (CSLB: 137345)  
 Tested Features: NRCV/MCH-04 Duct Leakage

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

ID	System Name	System Location or Area Served	System Type	Group	Group Size	Select
1715409	System 001	1000	HVAC			No
1716652	System 002	1000	HVAC			No
1716653	System 003	1000	HVAC			No

NEXT

- Click NEXT 



Non-Residential Sampling

Project Name: The Shop (ID: 1452340)  
 Installing Contractor: DEV INSTALLERS & (CSLB: 137345)  
 Tested Features: NRCV/MCH-04 Duct Leakage

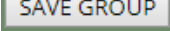
The following systems will be grouped (associately):


ID	System Name	System Location or Area Served	System Type	Group
1715409	System 001	1000	HVAC	
1716652	System 002	1000	HVAC	
1716653	System 003	1000	HVAC	

BACK

Select Sample Group Number:

SAVE GROUP

- 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.

Features of Project Systems being reported:

ID	System Name	Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
1716653	System 001	Duct Leakage	NRCV-MCH-04	System 001	Not Started	Report Results				

- Click Report Results 


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

RESPONSIBLE PERSON

Responsible Rater Name:

HERS Rater 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.

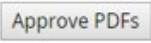

- Choose the appropriate payment type.

- **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.


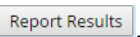
ID	System Name	Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
1716565	System 001	Duct Leakage	NRCV-MCH-04	(System 001)	Complete	Done	Download Refresh PDF	<input type="checkbox"/> Check to Select	Johnny Rater (john.rater@HERS)	Johnny Rater (john.rater@HERS)

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

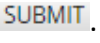


Select All PDF Documents to Sign  
Approve PDFs


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




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

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


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

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

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

ID	System Name	Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
1716565	System 001	Duct Leakage	NRCV-MCH-04	(System 001)	Complete 	Done	<a href="#">Download</a>  <a href="#">Return PDF</a> 	<input type="checkbox"/> Check to Select	Johnny Rater (John Rater's HVAC)	Johnny Rater (John Rater's HVAC)


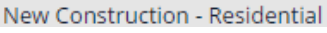


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- Click **Approve PDFs**  .
  - **Note:** Click the **PDF**  icon to access the official registered NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-22, or NRCV-PLB-21.

## 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  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) <i>Performance Calculation File ONLY</i> ?					
- Single Family Residence (SFR) - SINGLE ADDRESS (Custom Home - Single Orientation, Single Lot, etc) <i>Performance Calculation File or Prescriptive CF1R-NCB-01</i> ?					
- Single Family Residence (SFR) - SINGLE ADDRESS <b>ADDITION ONLY</b> <i>Performance Calculation File or Prescriptive CF1R-ADD-01</i> ?	N/A	N/A			
- Multi-Family Residence (MFR) <i>Performance Calculation File ONLY</i> ?					
- Multi-Family Residence (MFR) - SINGLE BUILDING PRESCRIPTIVE ONLY <i>Prescriptive CF1R-NCB-01 OR CF1R-ADD-01</i> ?	N/A	N/A			

- Input all project specific information.

**New 2019 New Construction MULTI-FAMILY Multi-Orientation Project**



Project Name:

Project Type:

Zip Code:  Required before ANY CF1R can be issued.

Default Gas Utility:

Default Electric Utility:

- Click CREATE PROJECT 
- Click OK  to confirm your project has been created.
- Input the Project Home information.

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

- **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

New Plan (CF1R) for Test (1385364)

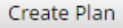

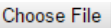
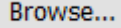
Plan Name: (Please do not use double or single quotes in the name)

Gas Utility:

Electric Utility:

OTHER PROVIDER REGISTRATION:  Check this box if this plan is being transferred from another HERS Provider.  
This Plan File is from another HERS Provider.  
Registration Number:   
Must be in proper format. For example: 116-P0100001054

- **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 .
- 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.

What Certifications will this plan be needing?


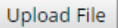


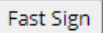
Please select any additional certifications that you wish this file to qualify for:

Compliance


Energy Star

I certify that this plan meets the Energy Star requirement of being at least 15% better than the California 2008 Building Energy Efficiency Standards.

CAHP

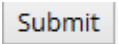
- 
- Click the Upload File link .
  - **Note:** Each Plan generates its own unique Plan ID number and Registration Number.
- Click OK to confirm the file has been processed.
- Click the PDF  icon to review the CF1R document, then click   to **Sign** or **Assign** the CF1R signature.

- **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.

**Select plan to be transferred**

RK Big House Test 1 (Plan ID: 267)
1 Story Example PV+Battery (Plan
1 Story Example PV+Battery (Plan
1 Story Example PV+Battery (Plan


- **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.



Press 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  **Fast Sign** to **Assign** or **Sign** the CF1R.

Select Signing Options Below:

**DOCUMENTATION AUTHOR**

Assign Documentation Author: Use this option to assign SOMEONE ELSE to sign as Documentation Author

-OR-

I want to SIGN as the Documentation Author: Use this option if YOU want to sign as Documentation Author

Johnny Rater (John Rater's HVAC)

My CEA/HERS Certification Identification:  (optional)

**RESPONSIBLE PERSON**

Assign Responsible Person: Use this option to assign SOMEONE ELSE to sign as Responsible Person

-OR-


I want to SIGN as the Responsible Designer: Use this option if YOU want to sign as Responsible Person

Johnny Rater (John Rater's HVAC)


My Designer's License:  (required)

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

**\*\*\* ALERT \*\*\*** - What's next? Buildings/Dwelling Units Needs to be Defined: [Define Buildings/Dwelling Units](#)

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

Energy Calculation Files | Sign Off | Systems Per Dwelling Units | Buildings/Dwelling Units

No dwelling units have been created for this calculation file. This file has **10 dwelling unit(s)** in the calculation.  
If you wish to create a building with 10 dwelling unit(s) so you can record CF2R and CF3R information, click the PLUS icon. 

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

**Create Building from Plan**

Plan Template:

Building Name:


Building Address:


Building Permit Number:

Use Building Permit Number for the Dwelling Units as well?

Is Building the Model for Sampling?




Are You SURE you want to Create this 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**.


Building:

**BUILDING GENERAL INFORMATION**

ID	Building Name	Address	Plan	Permit	Model	Units	Actions
15360	Testing	7243 Saffron Way	Test	231423	Yes	10	  

**DWELLING UNIT DETAILS**

ID	Dwelling Label	Address <small>(Copy from Building)</small>	Permit <small>(Copy from Building)</small>	Kitchens	Model ?	Default Rater ? <small>Manage Default Rater</small>	Block MCH-25 Weigh-In Option? ?	Actions
1889421	DDU-1 1 Bedr		231423	1	No	Select Default Rater	Use Project Default (NOT BLOC)	  
1889422	DDU-1 1 Bedr		231423	1	No	Select Default Rater	Use Project Default (NOT BLOC)	  
1889423	DDU-1 1 Bedr		231423	1	No	Select Default Rater	Use Project Default (NOT BLOC)	  
1889424	DDU-1 1 Bedr		231423	1	No	Select Default Rater	Use Project Default (NOT BLOC)	  
1889425	DDU-2 Studio		231423	1	No	Select Default Rater	Use Project Default (NOT BLOC)	  
1889426	DDU-2 Studio		231423	1	No	Select Default Rater	Use Project Default (NOT BLOC)	  
1889427	DDU-3 2 br-(1)		231423	1	No	Select Default Rater	Use Project Default (NOT BLOC)	  
1889428	DDU-3 2 br-(2)		231423	1	No	Select Default Rater	Use Project Default (NOT BLOC)	  
1889429	DDU-3 2 br-(3)		231423	1	No	Select Default Rater	Use Project Default (NOT BLOC)	  
1889430	DDU-3 2 br-(4)		231423	1	No	Select Default Rater	Use Project Default (NOT BLOC)	  

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

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

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

- Click the **Check Box to Sign**  **Check 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**


Please select the sampling type to work with Barnes Residence

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

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

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

- Click the **NEXT** link 
- The Registry will list all dwelling units as lots available for sampling.

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

ID	Lot Name	Phase	Plan	Permit	Address	City	Zip	Sample Group	Actions
783188	<a href="#">Lot 22</a>	Phase 1	Plan 105	15-05305	489 Nelder Grove Court	Tulare	93274		
832291	<a href="#">Lot 31</a>	Phase 1	Plan 1001	15-05305	485 Nelder Grove Court	Tulare	93274		
832292	<a href="#">Lot 32</a>	Phase 1	Plan 1050	15-04672	472 Nelder Grove Court	Tulare	93274		
783189	<a href="#">Lot 33</a>	Phase 1	Plan 204	15-04671	480 Nelder Grove Court	Tulare	93274		

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

ID	Lot Label	Address	City	Zip	Group	Sample
783188	Lot 22	489 Nelder Grove Court	Tulare	93274		<input checked="" type="button" value="Yes"/>
832291	Lot 31	480 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>
832292	Lot 32	472 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>

- Click the **NEXT** link 

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


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

The following addresses will be associated to the above group:

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

BACK 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.


Please select the sampling type to work with Barnes Residence

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

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

NEXT

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

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

ID	Lot Name	Phase	Plan	Permit	Address	City	Zip	Sample Group	Sample Size	Actions
832045	Lot_22	Phase 1	Plan 428 - Window	15-03963	2087 Emerald Bay	Tulare	93274	215-01456	5	Sample Limit Reached
719103	Lot_07	Phase 1	Plan 120K	15-04707	2037 Emerald Bay Avenue	Tulare	93274	215-02208	4	
783182	Lot_13	Phase 1	Plan 428 - Window	15-04640	2540 Emerald Bay Avenue	Tulare	93274			
783188	Lot_22	Phase 1	Plan 155	15-03360	400 Nelder Grove Court	Tulare	93274			
832291	Lot_31	Phase 1	Plan 132K	15-05365	400 Nelder Grove Court	Tulare	93274			
832292	Lot_32	Phase 1	Plan 155D	15-04072	472 Nelder Grove Court	Tulare	93274			

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

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

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

ID	Lot Label	Address	City	Zip	Group	Sample
783188	Lot 22	469 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>
832291	Lot 31	400 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>
832292	Lot 32	472 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>

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

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

The following addresses will be associated to the above group:

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


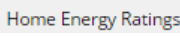

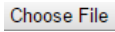

- Click **OK**  to confirm the group has been created.

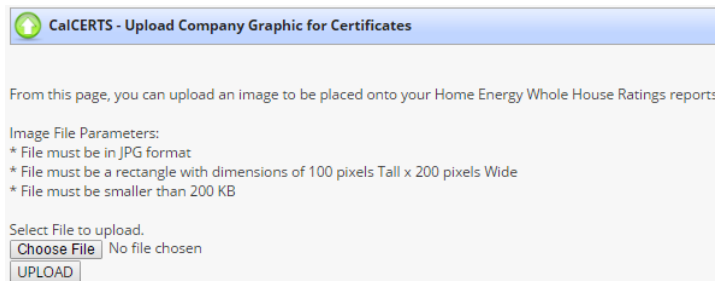





- Once the desired group has been created, click the CF3R icon located in the project road map at the top of the page to complete the CF3R forms used by the Rater for HERS Verification.
- After all test information has been entered, it must be signed before it can be completed. To review and sign multiple forms at once, use the Mass Signing Page for the selected form.

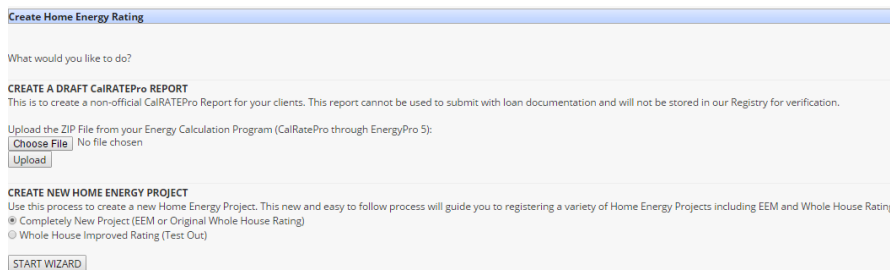
## Home Energy Ratings


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

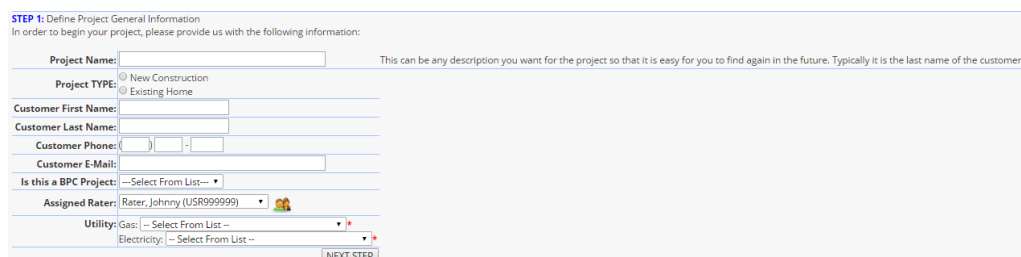
- Click the **Projects** link  located on the left side menu bar.
- Click the **Home Energy Ratings** link 
- **Here you have an additional option before you create your project.**
  - Upload Company Graphic to be placed onto your Home Energy Whole House Rating Reports:
  - Click the **Upload Company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

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

Calculation File:  No file chosen

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

- Click **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**
  - **OR**
  - Click the [\[CLICK HERE\]](#) link to proceed as a Brand New Project.

**\*\*\* ALERT \*\*\***

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

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

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

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

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

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

EEM Report  
 **Whole House Rating Report**

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

Rater: Johnny (USR999999)

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

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



Please verify the information below.

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

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

[Check Out](#)

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

**THANK YOU!!!**

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

Billing Info


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

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

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

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



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

**STEP 4: Review, Pay for Final and Certify**

Your DRAFT Report(s) are ready to review.

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

[EDIT PROJECT INFO](#)









**HOME ENERGY FILE UPLOAD**  
FILE INFORMATION

<b>Climate Zone:</b> 12	<b>Orientation:</b> 0
<b>Conditioned Floor Area:</b> 2519	<b>Volume:</b> 22671
<b>Number of Stories:</b> 1	<a href="#">REPLACE FILE</a>

**REPORTS**

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

**Whole House Rating:**


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

[PAY FOR FINAL/OFFICIAL Report](#)

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

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

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



Please verify the information below.

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

**Method To Pay:**

Credit Card  
 On Account (\$1,084.50 Balance)

[Check Out](#)

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

**THANK YOU!!!**

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

Billing Info

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

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

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









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

**STEP 5: CERTIFIED AND COMPLETE**

Your OFFICIAL Report(s) are ready to review.

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


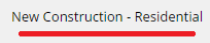



HOME ENERGY FILE UPLOAD FILE INFORMATION			
<b>Climate Zone:</b>	12	<b>Orientation:</b>	0
<b>Conditioned Floor Area:</b>	2519	<b>Volume:</b>	22671
<b>Number of Stories:</b>	1		

REPORTS	
<b>Pay for EEM:</b>	Would you like to purchase an EEM Report? <input type="button" value="Pay for Draft"/>
<b>Whole House Rating:</b>	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: 
	<b>REGISTER TEST-OUT:</b> Whole House Rating Improved: <a href="#">REGISTER Whole House Rating Improved</a>


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

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

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

 **EnergyStar Version:** 3.2 (.09) 

- 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.

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

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

Responsible Rater's Name

Responsible HERS Company Name:  (required)

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




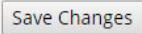

Forms for 3.2 Revision .09	Inspected Dwelling Unit	Status	Start
National HVAC Commissioning Checklist (Rev .09)	31 Natoma Street (1stFlrOneBR-(1/2))	Complete	1stFlrOneBR-(1/2) 31 Natoma Street




- 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 [CLICK HERE](#) hyperlink to return to the page you came from
- Click on the **PDF** icon for Energy Star Certificate in order to download.


# Completing Projects

## CF1R Signature Notifications

- Within the CF1R Registration Bin

- Click **CF-1R Registration**  **CF-1R Registration** 
- Select the year code for the bin you would like to access. This feature only applies to the 2013, 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.




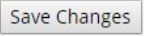

<b>DOCUMENTATION AUTHOR - Alert: Needs Signature</b>	
Documentation Author:	Test Tester
Documentation Author Company:	Builder Two
CEA/HERS	
Certification Identification:	
Signed On:	 Fast Sign
<b>RESPONSIBLE DESIGNER - Alert: Needs Signature</b>  <input type="checkbox"/> Check this box if you want to be included in e-mail to Responsible Person.	
Responsible Designer Name:	Johnny Builder
Responsible Designer Company Name:	Builder One
Designer's License:	Test
Signed On:	 Fast Sign

- 
- 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.

<b>RESPONSIBLE DESIGNER - Alert: Needs Signature</b>  <input checked="" type="checkbox"/> Check this box if you want to be included in e-mail to Responsible Person. <i>Johnny Installer has already made a request for a signature.</i>	
Responsible Designer Name:	Johnny Builder
Responsible Designer Company Name:	Builder One
Designer's License:	Test
Signed On:	 Fast Sign



- 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.

DOCUMENTATION AUTHOR - Alert: Needs Signature	
Documentation Author:	Test Tester
Documentation Author Company:	Builder Two
CEA/HERS Certification Identification:	
Signed On:	 Fast Sign
RESPONSIBLE DESIGNER - Alert: Needs Signature <input type="checkbox"/> Check this box if you want to be included in e-mail to Responsible Person.	
Responsible Designer Name:	Johnny Builder
Responsible Designer Company Name:	Builder One
Designer's License:	Test
Signed On:	 Fast Sign
	



- 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.

RESPONSIBLE DESIGNER - Alert: Needs Signature <input checked="" type="checkbox"/> Check this box if you want to be included in e-mail to Responsible Person. Johnny Installer has already made a request for a signature.	
Responsible Designer Name:	Johnny Builder
Responsible Designer Company Name:	Builder One
Designer's License:	Test
Signed On:	 Fast Sign
	

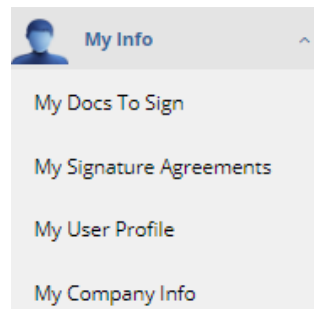
## Signing Documents

- 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 Select  **Check to Select** box to the right of the form name located under Document Status.
- Click 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.



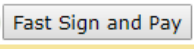
Document Type		
	CF1R Performance Documents	N/A
	CF1R Prescriptive Documents	<a href="#">Click To Sign Document(s)</a>
	CF1R Supplemental Documents	N/A
	CF2R Documents	N/A
	CF3R Documents	N/A

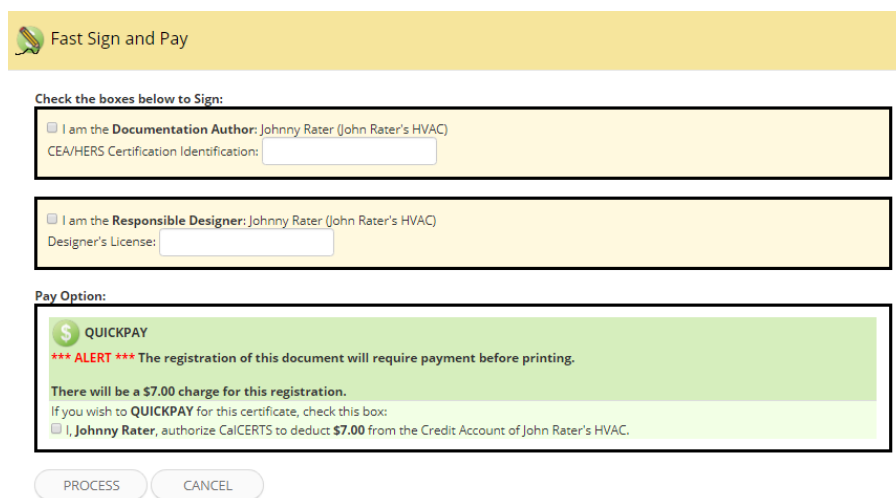
- Select **Click To Sign Document(s)** [Click To Sign Document\(s\)](#).
  - **Note:** The **Click To Sign Documents** will only appear if there are documents to sign for that document type.
- Click the PDF  icon to review the unofficial document before approval.


- 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](mailto:Billing@calcerts.com). Once the request is received, the Billing Department will verify the invoice and work with the user to initiate the credit.

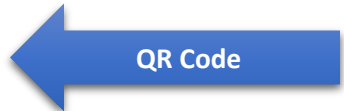
## Status Reports

- **Project Status Report (PSR)**

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

Project Status Report		CalCERTS, Inc	
		1 of 2	
<b>GENERAL INFORMATION</b>			
Code Year Reference:	08-13		Post to: psr@calcerts.com
Project Name:	East Project 1		
Project Type:	New Construction 2013		
Address:	1234 N. 1st Ave		
City / State / Zip:	Camden NJ / NJ / 08104		
Licensing Authority:	City of Easton		
Number:	12345		
JRS: 08/13/2013 COMPLETE			
<b>OSCCALS XLS: COMPLETE</b>			
<b>GENERAL INFORMATION - Certificate of Compliance</b>			
OSCCALS Type:	6 - Compliance		
Registered User:	0 - 0/0/0/0/0		
Registration Date:	11/03/2014 09:20		
Registration Number:	14-103400000-000000000000		
<b>PSR INFORMATION - Certificate of Installation</b>			
System	Form	Registered Date	Registration Number
System 1	Q 244-191-01 (No. 191) 191-01	07/21/2016	22-HER40229-1110011-0001
System 1	Q 244-191-02 (No. 191) 191-02	07/21/2016	22-HER40229-1110011-0002
System 1	Q 244-191-03 (No. 191) 191-03	07/21/2016	22-HER40229-1110011-0003
System 1	Q 244-191-04 (No. 191) 191-04	07/21/2016	22-HER40229-1110011-0004
System 1	Q 244-191-05 (No. 191) 191-05	07/21/2016	22-HER40229-1110011-0005
System 1	Q 244-191-06 (No. 191) 191-06	07/21/2016	22-HER40229-1110011-0006
System 1	Q 244-191-07 (No. 191) 191-07	07/21/2016	22-HER40229-1110011-0007
System 1	Q 244-191-08 (No. 191) 191-08	07/21/2016	22-HER40229-1110011-0008
System 1	Q 244-191-09 (No. 191) 191-09	07/21/2016	22-HER40229-1110011-0009
System 1	Q 244-191-10 (No. 191) 191-10	07/21/2016	22-HER40229-1110011-0010
System 1	Q 244-191-11 (No. 191) 191-11	07/21/2016	22-HER40229-1110011-0011
System 1	Q 244-191-12 (No. 191) 191-12	07/21/2016	22-HER40229-1110011-0012
System 1	Q 244-191-13 (No. 191) 191-13	07/21/2016	22-HER40229-1110011-0013
System 1	Q 244-191-14 (No. 191) 191-14	07/21/2016	22-HER40229-1110011-0014
System 1	Q 244-191-15 (No. 191) 191-15	07/21/2016	22-HER40229-1110011-0015
System 1	Q 244-191-16 (No. 191) 191-16	07/21/2016	22-HER40229-1110011-0016
System 1	Q 244-191-17 (No. 191) 191-17	07/21/2016	22-HER40229-1110011-0017
System 1	Q 244-191-18 (No. 191) 191-18	07/21/2016	22-HER40229-1110011-0018
System 1	Q 244-191-19 (No. 191) 191-19	07/21/2016	22-HER40229-1110011-0019
System 1	Q 244-191-20 (No. 191) 191-20	07/21/2016	22-HER40229-1110011-0020
<b>PSR INFORMATION - Certificate of Verification</b>			
FA: 12/13/2013 10:00:00 AM		JRS: 08/13/2013 09:20	
PSR Number: 12345		CalCERTS, Inc	
Date: 07/21/2016			

Project Status Report		CalCERTS, Inc	
		1 of 2	
<b>GENERAL INFORMATION</b>			
Code Year Reference:	08-13		Post to: psr@calcerts.com
Project Name:	East Project 1		
Project Type:	New Construction 2013		
Address:	1234 N. 1st Ave		
City / State / Zip:	Camden NJ / NJ / 08104		
Licensing Authority:	City of Easton		
Number:	12345		
JRS: 08/13/2013 COMPLETE			
<b>GENERAL INFORMATION - Certificate of Compliance</b>			
OSCCALS Type:	6 - Compliance		
Registered User:	0 - 0/0/0/0/0		
Registration Date:	11/03/2014 09:20		
Registration Number:	14-103400000-000000000000		
<b>PSR INFORMATION - Certificate of Installation</b>			
System	Form	Registered Date	Registration Number
System 1	Q 244-191-01 (No. 191) 191-01	07/21/2016	22-HER40229-1110011-0001
System 1	Q 244-191-02 (No. 191) 191-02	07/21/2016	22-HER40229-1110011-0002
System 1	Q 244-191-03 (No. 191) 191-03	07/21/2016	22-HER40229-1110011-0003
System 1	Q 244-191-04 (No. 191) 191-04	07/21/2016	22-HER40229-1110011-0004
System 1	Q 244-191-05 (No. 191) 191-05	07/21/2016	22-HER40229-1110011-0005
System 1	Q 244-191-06 (No. 191) 191-06	07/21/2016	22-HER40229-1110011-0006
System 1	Q 244-191-07 (No. 191) 191-07	07/21/2016	22-HER40229-1110011-0007
System 1	Q 244-191-08 (No. 191) 191-08	07/21/2016	22-HER40229-1110011-0008
System 1	Q 244-191-09 (No. 191) 191-09	07/21/2016	22-HER40229-1110011-0009
System 1	Q 244-191-10 (No. 191) 191-10	07/21/2016	22-HER40229-1110011-0010
System 1	Q 244-191-11 (No. 191) 191-11	07/21/2016	22-HER40229-1110011-0011
System 1	Q 244-191-12 (No. 191) 191-12	07/21/2016	22-HER40229-1110011-0012
System 1	Q 244-191-13 (No. 191) 191-13	07/21/2016	22-HER40229-1110011-0013
System 1	Q 244-191-14 (No. 191) 191-14	07/21/2016	22-HER40229-1110011-0014
System 1	Q 244-191-15 (No. 191) 191-15	07/21/2016	22-HER40229-1110011-0015
System 1	Q 244-191-16 (No. 191) 191-16	07/21/2016	22-HER40229-1110011-0016
System 1	Q 244-191-17 (No. 191) 191-17	07/21/2016	22-HER40229-1110011-0017
System 1	Q 244-191-18 (No. 191) 191-18	07/21/2016	22-HER40229-1110011-0018
System 1	Q 244-191-19 (No. 191) 191-19	07/21/2016	22-HER40229-1110011-0019
System 1	Q 244-191-20 (No. 191) 191-20	07/21/2016	22-HER40229-1110011-0020
<b>PSR INFORMATION - Certificate of Verification</b>			
FA: 12/13/2013 10:00:00 AM		JRS: 08/13/2013 09:20	
PSR Number: 12345		CalCERTS, Inc	
Date: 07/21/2016			



- 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.

**Search for Project Status Report**

Please select a Building Department and a Search Type from the lists below.

**Building Department:**

**Search For Single Project By:**

Street Address

CEC Registration Number


HERS Rater (Name)

HERS Rater (CalCERTS ID #)

Building Department Permit #




**View List of All Projects By Calendar Year:**

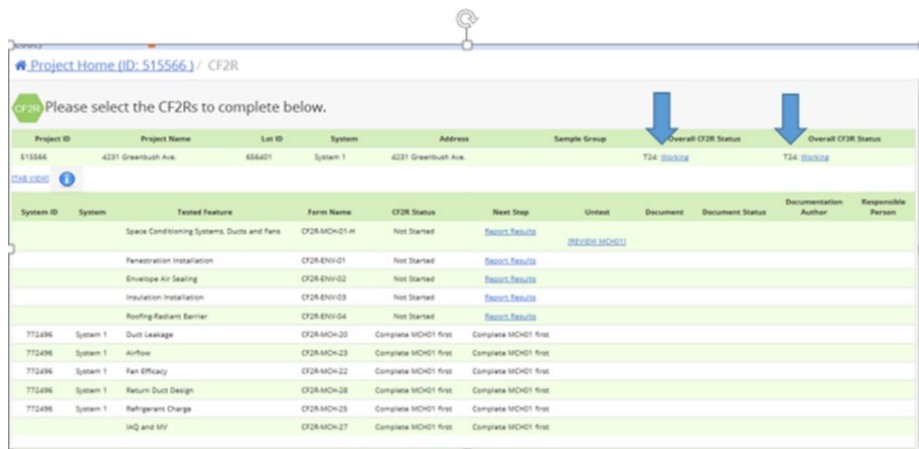
All Projects by Year

- 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.

▲ 10 record(s) found Matching Records OUTSIDE your jurisdiction

- **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: [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**:




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

System ID	System	Tested Feature	Form Name	CF2R Status	Next Step	Unitest	Document	Document Status	Documentation Author	Responsible Person
		Space Conditioning Systems, Ducts and Fans	CF2R-MCH-01-H	Not Started	<a href="#">Report Results</a>					
		Remediation Installation	CF2R-ENV-01	Not Started	<a href="#">Report Results</a>					
		Envelope Air Sealing	CF2R-ENV-02	Not Started	<a href="#">Report Results</a>					
		Insulation Installation	CF2R-ENV-03	Not Started	<a href="#">Report Results</a>					
		Roofing/Radiant Barrier	CF2R-ENV-04	Not Started	<a href="#">Report Results</a>					
772496	System 1	Duct Leakage	CF2R-MCH-20	Complete MCH01 First	Complete MCH01 First					
772496	System 1	Airflow	CF2R-MCH-23	Complete MCH01 First	Complete MCH01 First					
772496	System 1	Fan Efficacy	CF2R-MCH-22	Complete MCH01 First	Complete MCH01 First					
772496	System 1	Return Duct Design	CF2R-MCH-26	Complete MCH01 First	Complete MCH01 First					
772496	System 1	Refrigerant Charge	CF2R-MCH-25	Complete MCH01 First	Complete MCH01 First					
		HQ and MV	CF2R-MCH-27	Complete MCH01 First	Complete MCH01 First					

- **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 (Penetration Installation)	●
	CF2R-ENV-02 (Envelope Air Sealing)	●
	CF2R-ENV-03 (Insulation Installation)	●
	CF2R-MCH-01 (Space Conditioning Systems, Ducts and Fans)	●
System 1	CF2R-MCH-20 (Duct Leakage)	●
System 1	CF2R-MCH-23 (Airflow)	●
System 1	CF2R-MCH-22 (Fan Efficacy)	●
System 1	CF2R-MCH-25 (Refrigerant Charge)	●
	CF2R-MCH-27 (IAQ and MV)	●
	CF2R-LTG-01 (Lighting)	●
	CF2R-PUB-02 (SD HVS Distribution)	●
CF3R INFORMATION - Certificate of Verification		
System	Form	Compliance
System 1	CF3R-MCH-20 (Duct Leakage)	●
System 1	CF3R-MCH-23 (Airflow)	●
System 1	CF3R-MCH-22 (Fan Efficacy)	●
System 1	CF3R-MCH-25 (Refrigerant Charge)	●
	CF3R-MCH-27 (IAQ and MV)	●

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

● Green = Complete  
● Red = Incomplete

- To access the QSR:

- Log 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](mailto: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](mailto:Support@calcerts.com), or by calling (916) 985-3400 ext. \*.

CalCERTS also has a [Helpdesk](https://calcerts.zendesk.com/hc/en-us) 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](mailto: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](mailto:Support@calcerts.com) or call (916) 985-3400 ext \*.

### Training Questions – [Training@calcerts.com](mailto: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](mailto:Training@calcerts.com) or call (916) 985-3400 ext. 2013.

### Quality Assurance Questions – [QA@calcerts.com](mailto: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](mailto:QA@calcerts.com) or call (916) 805-5235.

### Billing Questions – [Billing@calcerts.com](mailto: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](mailto:Billing@calcerts.com) or call (916) 985-3400 ext. 2010.

### General Questions – [Info@calcerts.com](mailto:Info@calcerts.com)

If none of the above options apply to your questions or comments, please contact us at [info@calcerts.com](mailto:info@calcerts.com).